Jenzabar CX

Financial Aid

JENZABAR

User Guide

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JENZABAR, INC.
FINANCIAL AID USER GUIDE

TABLE OF CONTENTS

SECTION 1 - GETTING STARTED

Overview

Introduction

Financial Aid is an application developed by Jenzabar that includes the Financial Aid Entry product that lets you enter and maintain financial aid information. This application also allows you to view a student's award disbursements and compliance to your institution's financial aid policies. In addition, you can create and print award notification forms and transcripts.

Note: You will find that most of this guide explains the Financial Aid Entry product. However, the guide also discusses other financial aid features, such as refunding aid.

Product Differences

This guide contains information for using all features developed for the Financial Aid Entry product. Your institution may or may not have all the features discussed in this guide.

Purpose of This Guide

This guide serves as a learning tool and a reference guide for viewing, adding, updating, and deleting financial aid information.

Intended Audience

This guide is intended for menu users in the Financial Aid office who perform data entry operations. Menu users include the application coordinator, administrative assistants, and operators.

Learning Objectives

Using this guide you will be able to:

- Add and update financial aid information in specific sessions.
- Add and update a student's cumulative award history.
- Check a student's compliance for specific financial aid.
- Use the Satisfactory Academic Progress (SAP) processes.
- Refund financial aid.
- Enter and print comments associated with a student's financial aid.
- Update and print financial aid transcripts.
- Produce financial aid award notification forms.
- Produce financial aid reports.

How to Use This Guide

If you are not familiar with how your institution maintains its financial aid award information, read this guide for detailed information about how to use the Financial Aid application.

If you are familiar with how your institution maintains this information and just need information in a particular area of CX, look through the table of contents or index; then refer to the pages you need.

Structure of Jenzabar CX User Guides

Jenzabar CX user guides contain the following sections:

- Section 1 - An overview of general information
- Section 2 - A reference of the screens, fields, and commands for the application

- Section 3 (and up) - Detailed procedures for using the application
- Last Section - A reference of application error and warning messages
- Index

Other Information Resources

Introduction

This user guide contains information about the screens, options, and procedures that are specific to Financial Aid. However, some of these may be used in other CX products. Documentation for these common features appears in the manuals or guides to which they most specifically relate.

Resource List

The following provides references to other CX documentation for certain functions, screens, and options that are not described in this user guide.

For more information about:	***See:***
Common windows	*Getting Started User Guide*
Communications management	*Communications Management User Guide*
Detail windows	*Getting Started User Guide*
CX menus	*Getting Started User Guide*
CX universal commands: Help ID-type Query Scroll Table Lookup	*Getting Started User Guide*
Financial Aid Electronic Data Exchange	*Financial Aid Electronic Data Exchange (EDE) User Guide*
Financial Aid Need Analysis	*Financial Aid Need Analysis User Guide*
Financial Aid Packaging	*Financial Aid Packaging User Guide*
Financial Aid Pell Grant processing	*Financial Aid Electronic Data Exchange (EDE) User Guide*
Financial Aid reports	*Financial Aid Technical Manual*
Financial Aid screen flow diagram	*Financial Aid Technical Manual*
Financial Aid tables and table maintenance	*Financial Aid Technical Manual*
PERFORM screens: Common commands General description Ring menus	*Getting Started User Guide*
Program screens: Common commands General description Toolbars	*Getting Started User Guide*
Query tools	*Getting Started User Guide*
QuickMate	*QuickMate Installation Guide* and QuickMate online help
Registration	*Registration User Guide*
Reporting tools	*Getting Started User Guide*
Student Billing	*Student Billing User Guide*
Terminology	*Master Glossary*

Before You Begin Using Financial Aid Entry

Introduction

This section provides the following:

- The purpose of Financial Aid Entry.
- A checklist of information you need to know and tasks you need to perform before using Financial Aid Entry.
- Background knowledge you must possess to use Financial Aid Entry.
- A summary of the financial aid reports.
- A summary of the Financial Aid Entry process.

Purpose of Financial Aid Entry

The primary purpose of Financial Aid Entry is to enable you to add, update, and maintain financial aid awards for specific sessions. Using Financial Aid Entry, you can access associated Financial Aid products including Financial Aid Need Analysis and Financial Aid Packaging.

Note: While you can access Financial Aid Need Analysis from Financial Aid Entry, you cannot access Financial Aid Entry from Financial Aid Need Analysis. You can access Financial Aid Packaging from Financial Aid Entry only if the product is available.

Prerequisite Tasks

Use the following checklist to ensure you have reviewed all required tasks before you begin using Financial Aid Entry.

- Use the Financial Aid Need Analysis program to perform a need analysis and assign budgets.
- Identify the specific programs, sessions, and award year for which you are entering financial aid information.
- Identify the valid codes for the award notification forms to complete the Output Form field on the Financial Aid Entry.

Background Knowledge

This list describes the necessary background information that you should know.

Jenzabar CX

Know how to use the following, as described in the *Getting Started User Guide*:

- CX menu structure
- CX screen toolbars, command lines, ring menus, and comment lines
- CX universal commands, including:
  - **Help**
  - **ID-Type**
  - **Query**
  - **Scroll**
  - **Table Lookup**

Authorized personnel

Know answers to the following questions:

- Who is authorized to access online financial aid information?
- Who is authorized to add and update financial aid need analysis information?
- Who is authorized to add and update financial aid budgets and awards?

Important dates

Know when the following events occur:

- Advance registration

- Open registration
- Late registration
- Refund periods
- Withdrawal dates
- When the Business office posts aid to students' accounts
- When Automatic Recalculation ceases to occur

Note: Ensure the CX Registration and Fiscal/Financial applications have been set up so the fiscal and academic calendars include the sessions for which you are awarding aid. Ensure all offices use the same values for sessions (e.g., FA for fall, SP for spring, SM for summer).

Financial aid policies and procedures

Know answers to the following questions:

- Does any other office(s) at your institution award financial aid?
- Which office at your institution is in charge of handling students' accounts? (Contact this office for coordination of posting financial aid and/or refunding financial aid.)
- Does your institution award financial aid in the summer based on awards remaining from the previous year or based on awards to be given in the upcoming year?
- Does your institution register graduate students in undergraduate courses or register undergraduates in graduate courses (since aid is awarded by program)?

Reporting Tools

Jenzabar provides several solutions to serve the Financial Aid application reporting needs. In addition to standard reports located on the Table Maintenance menu, your institution can choose from a variety of reporting tools. The reporting tools are as follows:

ACE Reports

The standard reports located in the CX menu system. You can access and run ACE reports from the menus to which they relate. For example, standard financial aid reports appear on the Financial Aid: Reports menu.

The initial screen that appears when you select a report prompts you to enter any required parameters for producing it. Once you have entered these, you can send the output to the screen or to a file, print the report immediately, or schedule it to be produced at a later time.

Note: For more information on running ACE reports, see *Producing Standard and Customized Reports* in the *Getting Started User Guide*.

Impromptu®

A PC/Windows-based reporting tool intended for technical users. Using Impromptu and the Jenzabar CX ODBC driver, you can access *CX* data to produce reports. Impromptu organizes reporting information in *catalogs*. Jenzabar created the Financial Aid Services catalog to serve the reporting needs of financial aid.

Note: For more information on using Impromptu, see the online help provided with the product.

IQ®

A UNIX/character-based reporting tool created by IQ Software Corporation. Using IQ, you can access *CX* data to produce reports. IQ organizes reporting information in *categories/views*. Jenzabar created the Financial Aid views to serve the reporting needs of financial aid.

Note: For more information on using IQ, see the following:

- *Producing Standard and Customized Reports* in the *Getting Started User Guide*

– *Intelligent Query® Users Guide* (Jenzabar distributes this guide provided by the IQ Software Corporation)

PowerPlay®

A PC/Windows-based executive and management data analysis tool. Using static data files downloaded from *CX*, you can use PowerPlay to display and analyze data in a graphical, multilevel, drill-down structure.

Note: For more information on using PowerPlay, see the online help provided with the product.

Prism

A PC/Windows-based reporting tool intended for nontechnical users. Using Prism and the Jenzabar CX ODBC driver, you can access *CX* data to produce reports. Prism contains specific information lookup and retrieval windows for financial aid.

Note: For more information on using Prism, see the online help provided with the product.

Financial Aid Entry Process

Before you perform the Financial Aid Entry procedures, other processes must occur in other administrative offices at your institution. The following list describes these processes and shows where Financial Aid Entry fits into the overall process, assuming that no other offices at your institution award financial aid.

Note: The process shown below is an example; your institution's financial aid entry process may or may not include the following phases.

1. The Admissions office/Registration office enters student ID numbers and other enrollment information.
2. The Financial Aid office determines need, amount, and type of financial aid for each student.
3. The Registration office registers students for courses.
4. The Registration office/Student Billing office bills and receives payments from students.
5. The Accounting office invoices, receives payments from, and reconciles payments and refunds for deferment agencies.
6. The Business office/Financial Aid office reconciles payments and refunds with financial aid sources.

Conventions Used in This Guide

Introduction

Jenzabar has established a set of conventions to help you use this guide. The conventions presented below are not exhaustive, but they include the more frequently used styles and terms.

Style Conventions

Jenzabar CX guides observe the following style conventions.

Boldface type
Represents text that you type into the system (e.g., Type **UNDG**), command names (e.g., **Finish**), or keys you use to execute a command or function (e.g., **<Enter>**).

Bulleted lists
Show items not ranked or without a sequential performance.

CAUTION:
Indicates a caution or warning of a potential risk or condition.

<Enter>
Represents the Enter, Return, Line Feed, or ↵ key on your keyboard.

Italic type
Is used in any of these ways:

- To represent a new or key term
- To add emphasis to a word
- To reference another manual or a section within this guide
- To represent a variable for which you substitute another variable (e.g., substitute *filename* with an appropriate filename)

<Key name>
Represents a key that you must press.

Note:
Indicates a note, tip, hint, or additional information.

Numbered lists
Show ranking of items or sequence of performance.

Parentheses
When used around a field name, indicate the field is unlabeled. The field description includes the location of the field.

Quotation marks
Represent information written in this guide exactly as it appears on the screen.

Example: The message, "Now Running..." appears.

Jenzabar-Specific Terms

Some terms used in this guide may be unfamiliar to you, either because they are terms you have not used before or because Jenzabar has assigned a slightly different meaning to a familiar term. The following list identifies and explains the most common Jenzabar-specific terms:

Application
One or more software programs that enable you to perform a particular procedure (e.g., registering students).

Data

Specific information you enter into fields on a particular data entry screen.

Enter

To type information on a keyboard and execute by doing one of the following actions:

- Pressing the **<Enter>** key
- Clicking on the **OK** button
- Selecting **Finish**

F key

Any of the function keys located on your keyboard (e.g., **<F1>**).

Hot key

The capitalized and highlighted letter of a command on a command line, menu bar, or ring menu.

ID

The number assigned to each student or organization associated with your institution (e.g., 12345).

Parameter

A variable in the system that is given a constant value for a specific application (e.g., a date can be a parameter for producing a report).

Select

To execute a command by any of the following actions:

- Performing the keystrokes
- Pressing the hot key
- Highlighting the command or option and pressing **<Enter>**
- Clicking the mouse

System

The Jenzabar product, CX.

Keystrokes

When you see two keys separated by a dash (e.g., **<Ctrl-c>**), hold down the first key (**<Ctrl>**) while pressing the second (**<c>**).

SECTION 2 - USING THE FINANCIAL AID SCREENS

Overview

Introduction

The purpose of this section is to show each screen and window that you use for the Financial Aid application and to provide explanations for each of the fields on those screens and windows. This section also provides a quick reference of the commands and options you use to perform procedures in the Financial Aid application.

Refer to this section when you have questions about a specific field or command, or when you are performing procedures associated with Financial Aid.

Organization

The screens, windows, field names, and commands are listed by title in alphabetical order (unless otherwise noted) so you can locate the information quickly.

Screen Access

Access instructions for screens presume you are starting at the Student Processing: Financial Aid Main Menu, unless otherwise noted.

Screen Differences

The screen and window examples in this section represent those contained in the CX standard product in GUI format unless otherwise noted. Screen examples show question marks (?) for the **Table Lookup** option where space permits. If your institution changes these screens and windows to meet its specific needs, yours will differ from those shown in this section. Your screens and windows will also look different if you use CX in character-based format.

Aid by Enrollment Status List Window

Purpose

The Aid by Enrollment Status List window enables you to add or update the total amount of financial aid awarded to a student based on the student's current enrollment status for each session.

Access

Access the Aid by Enrollment Status List window by selecting the following, beginning at the Financial Aid Entry screen:

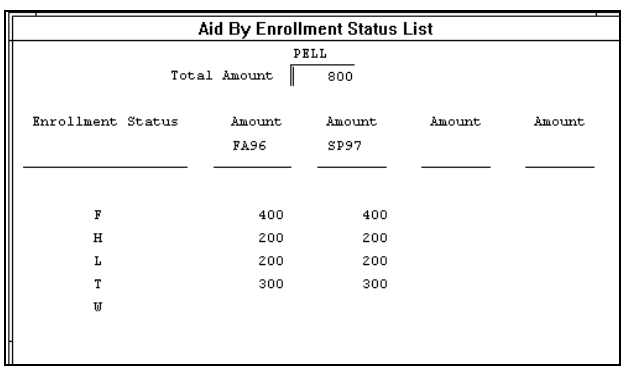
Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Update**.
3. Change the Prog and Pkg fields, if necessary, and select **Finish**.
4. Move the cursor to the line with the type of aid you want to view or update.
5. Select **Detail**.

Note: This window is only available if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled. If you cannot display this window, contact your Jenzabar coordinator.

Example

Following is an example of the Aid by Enrollment Status List window.



Fields

The following list describes the fields that appear on the Aid by Enrollment Status List window.

(Aid Code)
This is an unlabeled field located above the Total Amount field. A code identifying the type of aid (e.g., PELL) you are awarding for each enrollment status for each session. This is a display-only field.

Amount
The whole dollar amount awarded for the specific session (e.g. 400 dollars for the session FA96).

Note: The specific sessions displayed depend on the session codes you entered (up to four) on the Financial Aid Entry Program Parameters screen.

Enrollment Status

A code identifying the possible enrollment statuses. Valid codes are:

- F (Full-time)
- H (Half-time)
- L (Less than half-time)
- T (3/4-time)
- W (Withdrawn)

Total Amount

The total dollar amount of the award (e.g., 800). Defaults to the amount awarded for full-time enrollment.

Commands

The following list describes the commands you can execute from the Aid by Enrollment Status List Window.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Back

Enables you to move back one screen of data if additional screens exist.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Del-Line

Enables you to delete a line.

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Forward

Enables you to move forward one screen of data if additional screens exist.

Lookup

Accesses a **Table Lookup** window listing valid codes or values from which you can choose.

Award Disbursements Screen

Purpose

The Award Disbursements screen enables you to view a student's awards and the amount of each award that has been disbursed. The system displays this information in total and for each session.

Access

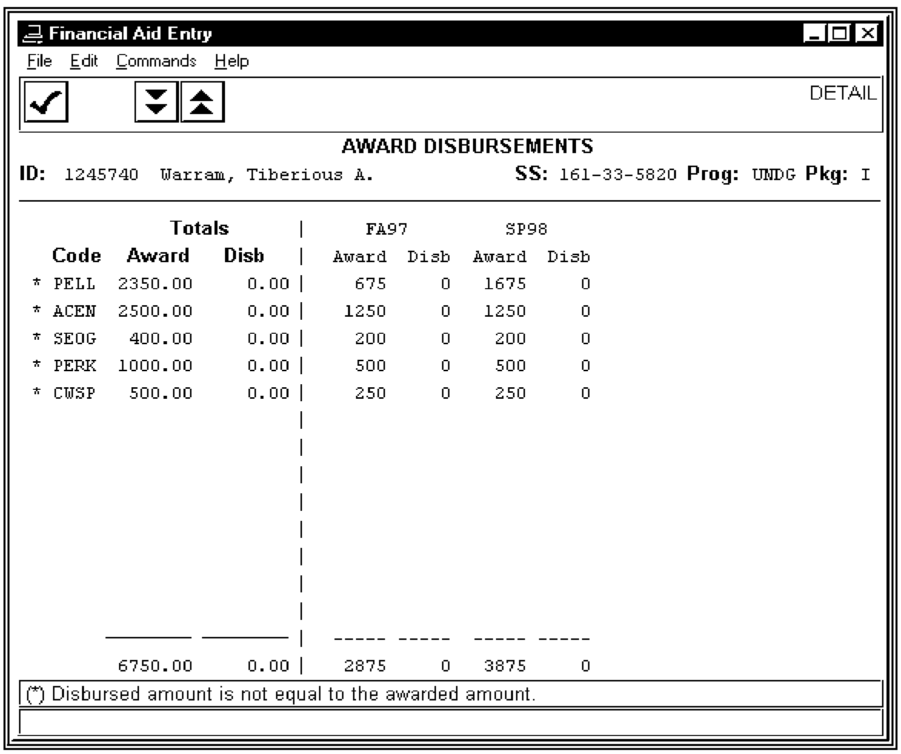
Access the Award Disbursements screen by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Disbursed**.

Example

Following is an example of the Award Disbursements screen.



Segments

The Award Disbursements screen is divided into three segments.

- The Header segment provides information about the student whose awards and disbursements you are viewing.
- The Totals segment displays the total amount and the disbursed amount of each award.
- The Sessions segment displays the amount and the disbursed amount of each award for each session.

Fields on the Header Segment

The following list describes the fields that appear on the Header segment of the Award Disbursements screen.

Note: The system maintains all fields, which are display-only.

ID

The system-generated number identifying the student in the database (e.g., 1245740). The student's name appears to the right.

Pkg

A code identifying the student's financial aid package status. Valid codes are:

- A (Packaged accepted by student)
- D (Denied by institution)
- I (Intended package)
- H (Hold disbursement of package)
- N (Nullified by institution)
- P (Pending student acceptance)
- R (Rejected by student)

Prog

A code identifying the student's academic program (e.g., UNDG for undergraduate).

SS

The student's social security number (e.g., 161-33-5820).

Fields on the Totals Segment

The following list describes the fields that appear on the Totals segment of the Award Disbursements screen.

Note: The system maintains all fields, which are display-only.

Award

The total dollar amount of the award (e.g., 960.00).

Code

A code identifying the type of award (e.g., PELL).

Disb

The total dollar amount of the award that has been disbursed (e.g., 0.00).

(Total)

This is an unlabeled field located at the bottom of the screen. The total amount of all awards and the amount disbursed.

Fields on the Sessions Segment

The following list describes the fields that appear on the Sessions segment of the Award Disbursements screen.

Note: The system maintains all fields, which are display-only. The specific sessions depend on the session codes you entered in the Financial Aid Entry Program Parameters screen, a maximum of four, and whether or not you are working with current and/or historical aid.

Award

The dollar amount of the award for each session (e.g., 530 has been awarded for the Fall 1996 session).

Disb

The dollar amount of the award that has been disbursed for each session(e.g., 0 has been disbursed for the Fall 1996 session).

(Total)
This is an unlabeled field located at the bottom of the screen. The total amount of all awards and the amount disbursed for each session.

Commands

The following lists the commands that you can execute from the Award Disbursements screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Page Down
Enables you to move forward one screen of data if additional screens exist.

Page Up
Enables you to move back one screen of data if additional screens exist.

Re-Execute
Enables you to display the most up-to-date award disbursement information.

Refund
Enables you to access the Refunds screen, if refundable aid exists for the student, and if your institution refunds aid to students.

Comments Screen

Purpose

The Comments screen enables you to view, add, delete, and/or update any comments associated with a student and his/her financial aid record(s).

Access

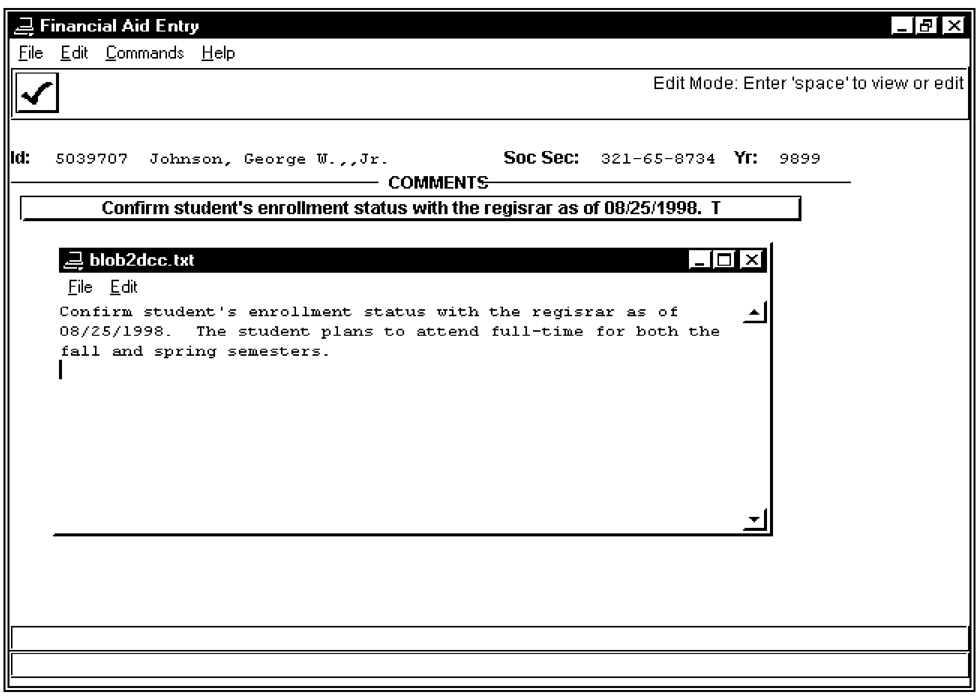
Access the Comment screen by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Text**.

Example

Following is an example of the Comments screen.



Fields

The following list describes the fields that appear on the Comments screen.

(Comments)
This is an unlabeled field located below the Comments title. It is a button you can click on to access a blob text window. You can view, enter, or edit any comment in this window that is associated with the student. If a comment exists, the first line of text in the blob text window appears on the button. Otherwise, an asterisk (*) appears.

Id

The system-generated number identifying the student in the database (e.g., 5039707). A display-only field, the student's name appears to the right (e.g., Johnson, George W., , Jr.).

Soc Sec
The student's social security number (e.g., 321-65-8734). This is a display-only field.

Yr
The financial aid award year for which you are processing awards (e.g., 9899). This is a display-only field.

Commands

The following lists the commands you can execute from the Comments screen and blob text window and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Edit
Available on the menu bar of the blob text window. Enables you to access the following commands:

- **Copy** - Duplicates selected (highlighted) text and sends it to the clipboard, enabling you to paste it in another area. Text remains on the clipboard until you **Copy** or **Cut** new text.
- **Cut** - Removes selected (highlighted) text and sends it to the clipboard, enabling you to paste it in another area. Text remains on the clipboard until you **Copy** or **Cut** new text.
- **Delete** - Permanently removes selected (highlighted) text.
- **Paste** - Inserts a copy of the text from the clipboard where the cursor is located. Replaces selected (highlighted) text.
- **Undo** - Reverses one action (e.g., typing, deleting, or pasting an incorrect word or sentence).

File
Available on the menu bar of the blob text window. Enables you to access the following commands:

- **Exit** - Closes the blob text window without saving any changes you made. If you made changes, the message "There are changes in this file. Should these changes be kept?" appears. Select **Yes** to save them or **No** not to.
- **Update and Exit** - Saves any changes you have made and closes the blob text window.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Compliance Detail Information Screen

Purpose

The Compliance Detail Information screen enables you to view the sequence of criteria associated with a compliance requirement and a student's compliance results for each criterion. When viewing compliance requirements, you can display the detailed compliance criteria that a student must satisfy for financial aid.

Access

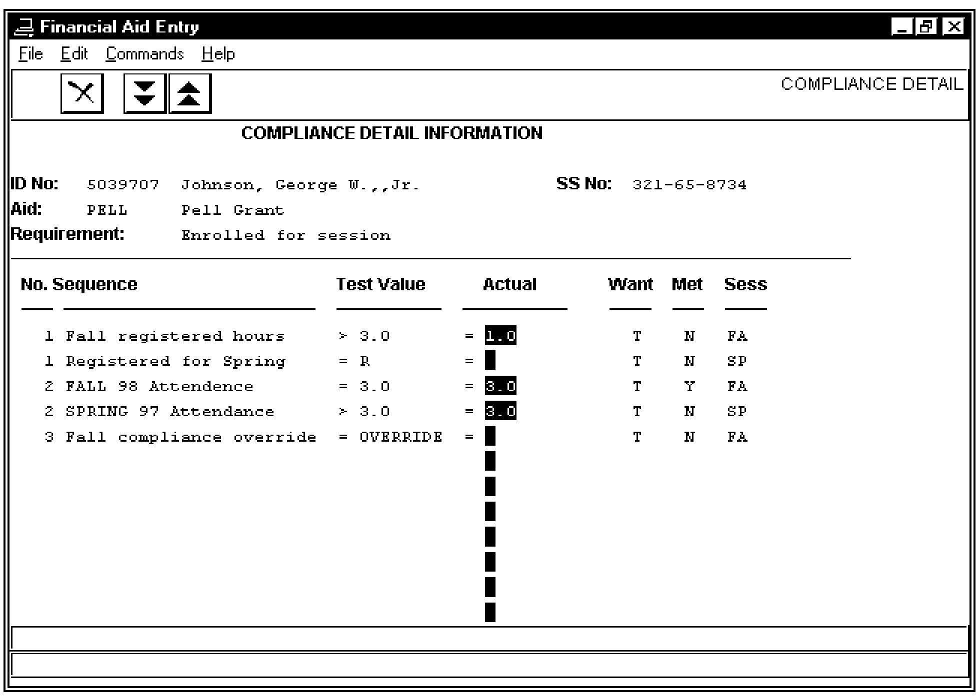
Access the Compliance Detail Information screen by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Compliance**.
3. At the Compliance Requirements screen, enter the desired aid code.
4. Select **Detail**.

Example

Following is an example of the Compliance Detail Information screen.



Segments

The Compliance Detail Information screen is divided into two segments:

- The Header segment provides information about the student whose requirement(s) you are viewing and the specific requirement for which you are viewing detail information.
- The Detail segment displays the detailed compliance criteria for the specific requirement that the student must satisfy.

Fields on the Header Segment

The following list describes the fields that appear on the Header segment of the Compliance Detail Information screen.

Note: The system maintains all fields, which are display-only.

Aid
A code identifying the aid for which you are viewing requirements and sequence of criteria (e.g., PELL). The description of the code appears to the right.

ID No
The system-generated number identifying the student in the database (e.g., 5039707). The student's name appears to the right.

Requirement
The requirement for which you are viewing detailed compliance criteria that the student must satisfy (e.g., Enrolled for session).

SS No
The student's social security number (e.g., 321-65-8734).

Fields on the Detail Segment

The following list describes the fields that appear on the Detail segment of the Compliance Detail Information screen.

Note: The system maintains all fields, which are display-only.

Actual
The actual value from the student's records used to verify compliance (e.g., 1.0).

Met
A code indicating whether the compliance criteria has been met (Y) or not (N) based on what the Test Value should be, what the Actual value is, and whether the Want value should be true (T) or false (F).

No.
The sequence number of compliance criteria. Each sequence number is arranged consecutively. All criteria with the same sequence number are included in a sequence of compliance, and the student must meet all to pass the criteria. Otherwise the student can meet the next sequence of criteria. For example, the student in the screen example must meet all criteria with a number 1 OR meet all criteria with a number 2 OR meet the criteria with a number 3 to comply with the requirement.

Sequence
A description of the compliance criteria the student must satisfy (e.g., Fall registered hours).

Sess
The session with which the compliance criteria is associated (e.g., FA for fall). If the compliance criteria is session-specific, the code in the Sess field is a session. If it is year-specific (i.e., the student must meet it on an annual basis), the code YEAR appears in this field.

Test Value
The value against which the value in the Actual field is tested (e.g., > 3.0 for Fall full time hours). The test value is made up of a relational operator, such as =, <, >, and a test value which you want the system to compare to the value in the Actual field.

Want

The code indicating whether the value in the Test Value field should be true (T) or false (F).

Commands

The following lists the commands you can execute from the Compliance Detail Information screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Page Down
Enables you to move forward one screen of data if additional screens exist.

Page Up
Enables you to move back one screen of data if additional screens exist.

Compliance Requirements Screen

Purpose

The Compliance Requirements screen enables you to view your institution's compliance requirements for a specific type of financial aid (e.g., for the Pell Grant) and a student's compliance results whether or not the aid has been awarded to the student. You can also verify that compliance requirements have been met and that the restrictions have not been exceeded.

Access

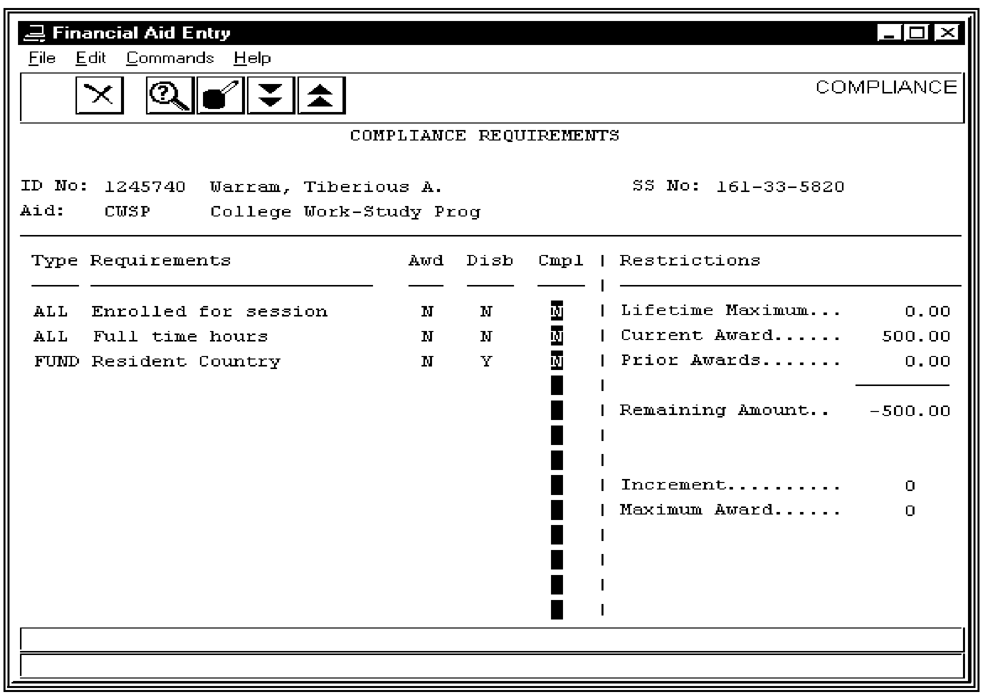
Access the Compliance Requirements screen by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Compliance**. Information appears when you enter an aid code.

Example

Following is an example of the Compliance Requirements screen.



Segments

The Compliance Requirements screen is divided into three segments:

- The Header segment provides information about the student whose requirements you are viewing and the specific type of aid for which you are viewing requirements.
- The Requirements segment identifies the requirements that must be met.
- The Restrictions segment displays specific restrictions for the student, such as the amount awarded, if applicable. This information comes from the Aid Package table (aidpkg_table; also known as the Fund Balance table).

Fields on the Header Segment

The following list describes the fields that appear on the Header Segment of the Compliance Requirements screen.

Aid
A code identifying the aid for which you are viewing requirements and sequence of criteria (e.g., PELL). The description of the code appears to the right. Use **Table Lookup** for a list of valid codes.

Note: The aid does not have to be currently awarded.

ID No
The system-generated number identifying the student in the database (e.g., 1245740). A display-only field, the student's name appears to the right.

SS No
The student's social security number (e.g., 161-33-5820). This is a display-only field.

Fields on the Requirements Segment

The following list describes the fields that appear on the Requirements Segment of the Compliance Requirements screen.

Note: The system maintains all fields, which are display-only.

Awd
A code indicating whether the requirement must be satisfied at the time the aid is awarded (Y) or not (N).

Cmpl
A code indicating whether the student meets the requirement (Y) or not (N).

Note: Highlighted codes indicate that default values were used to check compliance. Access the Compliance Detail Information screen to determine what specific criteria the student meets or does not meet.

Disb
A code indicating whether the requirement has to be satisfied before aid can be disbursed/posted (Y) or not (N).

Requirements
The compliance requirement(s) that must be satisfied to obtain aid (e.g., Enrolled for session).

Type
A code identifying the specific Aid Funding code to which the compliance requirement applies (e.g., ALL).

Fields on the Restrictions Segment

The following list describes the fields that appear on the Restrictions Segment of the Compliance Requirements screen.

Note: The system maintains all fields, which are display-only.

Current Award
The total dollar amount of the aid currently awarded to the student, if it exists (e.g., 800.00).

Increment

The dollar amount in increments that the automated Financial Aid Packaging processes use to award the aid.

Note: If the automated Financial Aid Packaging product is not enabled, this field is not used. For more information, see the *Financial Aid Packaging User Guide*.

Lifetime Maximum
The highest dollar amount of the specific aid that can be awarded to the student in a lifetime.

Maximum Award
The highest dollar amount of aid allowed to be awarded to the student under a packaging objective of the automated Financial Aid Packaging processes.

Note: If the automated Financial Aid Packaging product is not enabled, this field is not used. For more information, see the *Financial Aid Packaging User Guide*.

Prior Awards
The total dollar amount of all aid previously awarded to the student.

Remaining Amount
The total dollar amount of the specified aid currently awarded minus all aid previously awarded to the student.

Commands

The following lists the commands that you can execute from the Compliance Requirements screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close
Enables you to exit from the current screen or window.

Detail
Accesses the Compliance Detail Information screen enabling you to view the sequence of criteria associated with the selected compliance requirement.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Lookup
Accesses a **Table Lookup** window listing valid codes or values from which you can choose.

Query
Enables you to select another Aid code.

Contact Entry Screen

Purpose

The Contact Entry screen enables you to query a student's records for the purpose of viewing, adding, and updating the student's Contact records.

Access

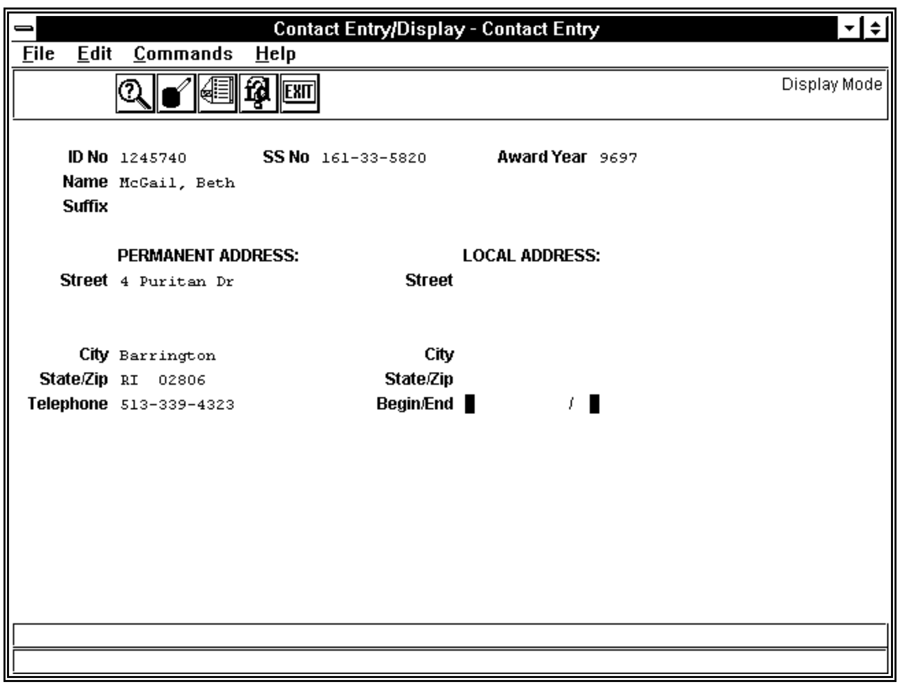
Access the Contact Entry screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Pell Payment Processing
3. Contact Entry/Display
4. Enter a financial aid award year, then select **Finish**

Display information on this screen by performing a query.

Example

Following is an example of the Contact Entry screen.



Fields

The following list describes the fields that appear on the Contact Entry screen.

Note: The system maintains all fields, which are display-only.

Award Year
The financial aid award year in which you are processing awards (e.g., 9697). Defaults to the year you entered on the Contact Entry/Display screen.

Begin/End
The beginning and ending dates that the student resided at the local address.

City (Local Address)

The city of the student's local address.

City (Permanent Address)
The city of the student's permanent address (e.g., Barrington).

ID No
The system-generated number identifying the student in the database (e.g., 1245740).

Name
The student's full name (e.g., McGail, Beth).

SS No
The student's social security number (e.g., 161-33-5820).

State/Zip (Local Address)
The state and zip code of the student's local address.

State/Zip (Permanent Address)
The state and zip code of the student's permanent address (e.g., RI 02806).

Street (Local Address)
The street name of the student's local address.

Street (Permanent Address)
The street name of the student's permanent address (e.g., 4 Puritan Dr).

Suffix
A letter or sequence of letters at the end of the student's name representing a professional title (e.g., MD for a Doctor of Medicine).

Note: The CX name and address management program (ADR) uses the Suffix field to format a name. ADR distinguishes between a professional suffix (e.g., M.D.) and a family suffix (e.g., Jr.). The family suffix remains a part of the Name field.

Telephone
The student's permanent area code and telephone number (e.g., 513-339-4323).

Commands

The following lists the commands that you can execute from the Contact Entry screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Auto-Mode
By-passes the Display mode and automatically puts the screen into Query mode, then Update or Insert mode.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close
Enables you to exit from the current screen or window.

Detail
Displays the Detail windows enabling you to select the student's Contact records.

Note: You can choose to view the contacts only or to include any names associated with the contacts (e.g., the name of a school from which you need transcripts).

Display ID

In Query mode, enters information into the fields for the ID being queried. Enables you to select it or query on another.

Exit

Enables you to leave the current screen or program.

Find ID

In Query mode, accesses the ID Query screen. Enables you to enter additional search criteria (e.g., name, social security number, etc.) and narrow the search for an ID record.

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Finished

Saves your field entries when you have completed your data entry or selection and want to continue.

ID-Type

Displays the view-only ID Type/Associated Records window containing information about the student. The window contains a variety of logical (Y/N) fields; the codes in the fields vary, depending on the types of records that exist in CX for the student. For example:

- If the student has a Donor record, the Donor field contains Y.
- If the student has a Financial Aid record, the Financial Aid field contains Y.

Query

Puts the screen into Query mode enabling you to search for a student.

Scroll

Accesses the Detail windows enabling you to select another method of viewing the student's Contact records. This command is available if you are already viewing the records.

> **Note:** You can choose to view the contacts only or to include any names associated with the contacts (e.g., the name of a school from which you need transcripts).

Select

In Query mode, enables you to select a student.

Update

Puts the screen into Update mode enabling you to edit records.

Contact Entry Window

Purpose

The Contact Entry window enables you to view and/or update a student's Contact records.

Access

Access the Contact Entry window by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Pell Payment Processing
3. Contact Entry/Display
4. Enter a financial aid award year, then select **Finish**
5. Perform a query, then select **Detail**
6. From the Detail Windows box, select one of the following:
   - **Contacts -** To view the student’s contacts only
   - **Names Displayed With Contacts -** To display any names associated with the student’s contacts (e.g., the name of a school from which you need financial aid transcripts)

Example

Following is an example of the Contact Entry window. This example shows only the Contact records with names.

Contact Entry

Tickler FY96   Record 1 of 70

Contact	Description	Add Date	Cmpl Date	Corr ID	Rt	Stat	Txt
FASAPSEL	Finaid SAP Selection	02/11/1997			O	E	*
VER	Verification Complete	11/18/1996	11/18/1996		O	C	*
PROBAT	Probate SAP	11/11/1996			O	E	*
FASAPSEL	Finaid SAP Selection	11/11/1996	11/11/1996		O	C	*
FASAPACT	Finaid SAP Action	11/11/1996	11/11/1996		O	C	*
ANFSGN05	FA Awrd Lett Recvd-Rev	11/02/1996	01/08/1997		I	C	*
PELLPMT	Pell Payment Reporting	10/31/1996			O	C	*
PELLPMT	Pell Payment Reporting	09/12/1996			O	C	*
ANFSGN04	FA Awrd Lett Recvd-Rev	09/05/1996			I	E	*
PELLPMT	Pell Payment Reporting	09/05/1996			O	C	*
ANFORM04	FA Award Letter - Rev	09/05/1996	09/05/1996		O	C	*

Fields

The following list describes the fields that appear on the Contact Entry window.

Add Date
The date (mm/dd/yyyy) the system or a user added the contact to the student’s record. Defaults to the current date, if the contact is being added.

Cmpl Date
The date (mm/dd/yyyy) the contact was completed.

Contact
A code identifying the contact (e.g., ANFORM). Use **Table Lookup** for a list of valid codes.

Corr ID

The correspondent ID number of an institution from which a financial aid transcript is expected. Press **<F6>** to perform a query. The name associated with the ID number appears in the (Name) field.

> **Note:** Jenzabar designed this field to be used in conjunction with expected financial aid transcripts from other institutions. However, you can use the field for any ID corresponding to the contact. For example, if you have a contact for a student loan, you can use the field to identify the lender or guarantee agency associated with the loan.

Description
The description of the contact from the Contact table (ctc_table). This is a display-only field.

(Name)
This is an unlabeled field located below the Description field. The name associated with the ID number in the Corr ID field (e.g., Wheaton College).

> **Note:** This field does not appear if you are viewing the contacts only.

Record
The number of the record being viewed and the total number of records for the student (e.g., Record 31 of 69 indicates you are viewing the 31st of 69 total records).

Rt
A code indicating the routing of the contact; that is, if the contact is incoming (I) or outgoing (O).

Stat
A code identifying the status of the contact. Valid codes are as follows. Generally, defaults to E, if the Contact record is being added.

- C (Completed)
- E (Expected)
- V (Voided)

Tickler
A code identifying the tickler to which the Contact records are associated (e.g., FY96). Defaults to the tickler associated with the financial aid year you entered on the Contact Entry/Display screen.

Txt
Any text comment associated with the Contact record. If the field displays an asterisk (*), no comment exists. Otherwise, the first character (a letter or blank space) of the comment appears.

> **Note:** In Update mode, if you click on the button, a blob text window similar to the Comments window appears. For more information and the commands to use for this window, see the *Comments Window* in this section.

Commands

The following lists the commands you can execute from the screen and their purposes.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Back
Enables you to move back one screen of data if additional screens exist.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command

- Returns to the previous command
- Exits from the current screen or window

Del-Line

In Update mode, removes a line in the Contact Entry window enabling you to delete a Contact record.

> **Note:** You must have permission to delete a Contact record.

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Forward

Enables you to move forward one screen of data if additional screens exist.

Insert

In Update mode, creates a blank line in the Contact Entry window enabling you to create a Contact record.

Sort

Displays a **Table Lookup** window enabling you to select another method of sorting the records.

Contact List Window

Purpose

The Contact List window enables you to view a student's Contact records from the Financial Aid Entry screen.

Note: The Contact List window is a view-only window. If you wish to add, delete, or update a Student's Contact records, you must access the Contact Entry window from Pell Payment Processing. For more information see *Contact Entry Window* in this section.

Access

Access the Contact List window by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Financial Aid Entry
3. Select **Finish**
4. Enter the desired parameters and select **Finish**
5. Perform a query, then select **Scroll Screens**
6. From the Scroll Screens menu, select **Ctc-info**

Example

Following is an example of the Contact List window.

Contact List

Thomas, Dave   Tickler FY98   Record 1 of 16

Contact	Description	Add Date	Cmpl Date	Corr ID	Route	Stat
ADMNOTE	Student Not Admitted	06/17/1998			O	E
AIDAPPIN	Aid Application Receive	06/17/1998			I	E
FAFIN	FAF Form Received	06/17/1998			I	E
FASTAT	Fin Aid Status Letter	07/07/1998			O	E
FEDIN	Federal Form Received	06/17/1998			I	E
FFSIN	FFS Form Received	06/17/1998			I	E
NAFIN	Need Form Received	06/17/1998			I	E
PACKAGE	Ready To Package	06/17/1998			O	E
PARTAXIN	Parent's Tax Form Recv'	06/17/1998			I	E
PELLPMT	Pell Payment Reporting	07/02/1998			O	C
PELLPMT	Pell Payment Reporting	06/24/1998			O	C

Fields

The following list describes the fields that appear on the Contact List window. All fields are Display only.

Add Date
The date (mm/dd/yyyy) the system or a user added the contact to the student's record. Defaults to the current date, if the contact is being added.

Cmpl Date
The date (mm/dd/yyyy) the contact was completed.

Contact
A code identifying the contact (e.g., ADMNOTE).

Corr ID

The correspondent ID number of an institution from which a financial aid transcript is expected.

Note: Jenzabar designed this field to be used in conjunction with expected financial aid transcripts from other institutions. However, you can use the field for any ID corresponding to the contact. For example, if you have a contact for a student loan, you can use the field to identify the lender or guarantee agency associated with the loan.

Description

The description of the contact from the Contact table (e.g., Student Not Admitted).

(Name)

This is an unlabeled field located above the Contact field. The student's full name (e.g., Thomas, Dave).

Record

The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 16 indicates you are viewing the 1st of 16 total records).

Route

A code indicating the routing of the contact; that is, if the contact is incoming (I) or outgoing (O).

Stat

A code identifying the status of the contact. Valid codes are as follows. Generally, defaults to E, if the Contact record is being added.

- C (Completed)
- E (Expected)
- V (Voided)

Tickler

A code identifying the tickler to which the Contact records are associated (e.g., FY98). Defaults to the tickler associated with the financial aid year you entered on the Contact Entry/Display screen.

Txt

Any text comment associated with the Contact record. If the field displays an asterisk (*), no comment exists. Otherwise, the first character (a letter or blank space) of the comment appears.

Commands

The following lists the commands you can execute from the screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close

Enables you to exit from the current screen or window.

Next

Enables you to move forward one screen of data if additional screens exist.

Previous

Enables you to move back one screen of data if additional screens exist.

Current Fund Balances Screen

Purpose

The Current Fund Balances screen enables you to view the current financial aid fund balances information. You can display fund balance information for any Aid code existing in the Aid table (aid_table).

Note: The system maintains the current fund balance information on this screen. Each time a financial aid award is added or updated, the system automatically updates the information.

Access

Access the Current Fund Balances screen by selecting the following, beginning at the Financial Aid Entry screen:

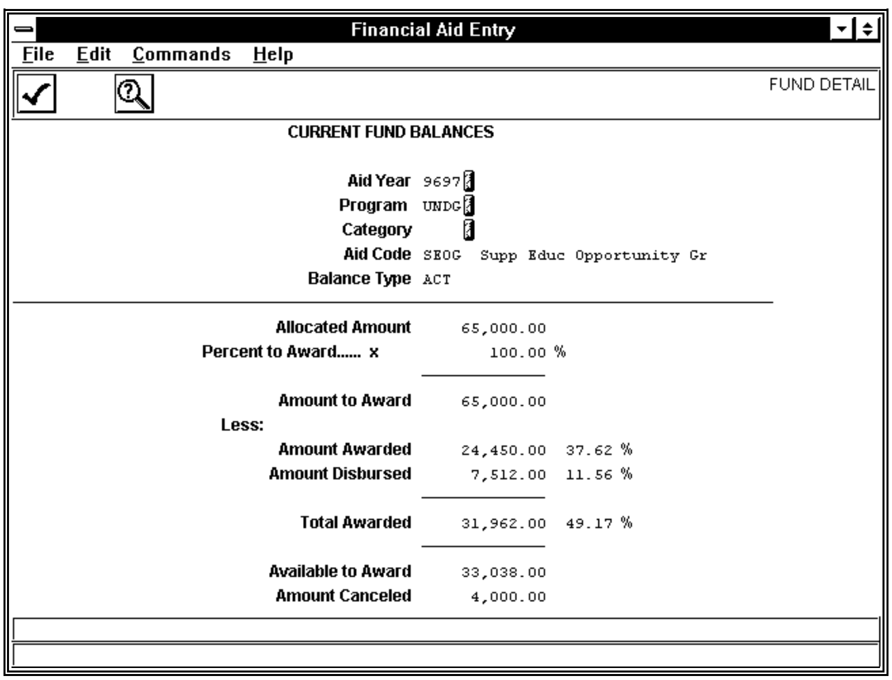
Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Funds**. Information appears when you perform a query.

Note: Other paths may exist.

Example

Following is an example of the Current Fund Balances screen.



Segments

The Current Fund Balances screen is divided into two segments:

- The Header segment displays the specific information for the Aid code for which you want to display current financial aid fund balances.

- The Fund Balances segment displays the fund balances for the specified Aid code and Category (if applicable).

Fields on the Header Segment

The following list describes the fields that appear on the Header segment of the Current Fund Balances screen.

Aid Code
A code identifying the aid for which you want to check the fund balance (e.g., SEOG). The description of the code appears to the right.

> **Note:** The aid does not have to be awarded to the student whom you have queried.

Aid Year
The financial aid year in which the aid is awarded and for which you want to check the fund balance (e.g., 9697). Defaults to the current year. Use **Table Lookup** for a list of valid years.

Balance Type
A code identifying the Packaging method from the Aid Package table (aidpkg_table; also known as the Fund Balance table). Enter the method to view the fund balance information from aid packaging Simulation records. Enter **ACT** (default) for the actual fund amounts.

Category
A code identifying the students' financial aid funding category (e.g., NEW for new students). Use **Table Lookup** for a list of valid codes.

> **Note:** If your institution makes distinctions among students, such as new or returning, you can split fund balances among the different categories, and you must enter a value in this field. Otherwise, leave this field blank.

Program
A code identifying the academic program in which aid is awarded and for which you want to check the fund balance. Defaults to UNDG (Undergraduate). Use **Table Lookup** for a list of valid codes.

Fields on the Fund Balances Segment

The following list describes the fields that appear on the Fund Balances segment of the Current Fund Balances screen.

> **Note:** The system maintains all fields, which are display-only. After posting occurs, the value in the Amount Disbursed field increases, and the values in the Available to Award and Amount Awarded fields decrease.

Allocated Amount
The total dollar amount allocated (e.g., 65,000.00) as specified in the Aid Package table (aidpkg_table; also known as the Fund Balance table).

Amount Awarded
The total dollar amount of the aid that has been awarded but not disbursed (e.g., 24,450.00) and its percentage of the Amount to Award (e.g., 37.62%).

Amount Canceled
The total dollar amount of the aid that has been canceled (e.g., 4,000.00). That is, aid with an aid status of R (Rejected by student) or N (Nullified by college).

Amount Disbursed

The total dollar amount of the aid that has been awarded and disbursed (e.g., 7,512.00) and its percentage of the Amount to Award (e.g., 11.56%).

Amount to Award
The total dollar amount of the aid that is to be awarded (e.g., 65,000.00) calculated using the formula: Allocated Amount multiplied by the Percent to Award.

Available to Award
The total dollar amount of the aid that is available to be awarded (e.g., 33,038.00) calculated using the formula: Amount to Award minus the Total Awarded.

Percent to Award
The percentage of the total dollars allocated that can be awarded (e.g., 100.00%) as specified in the Aid Package table (aidpkg_table; also known as the Fund Balance table).

Note: The award percentage for work-study programs can be over 100 percent because students in those programs earn less money than they are awarded.

Total Awarded
The total dollar amount of aid that has been awarded and disbursed (e.g., 31,962.00) and its percentage of the Amount to Award (e.g., 49.17%) calculated using the formula: Amount Awarded plus the Amount Disbursed.

Commands

The following lists the commands you can execute from the Current Fund Balances screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel
Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close
Enables you to exit from the current screen or window.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Query
Enables you to search for current fund balance information for a specific financial aid year, academic program, category, Aid code, and/or Packaging Method.

Default Initial Values Screen

Purpose

The Default Initial Values screen enables you to set the default values in specific FISAP status fields in students' financial aid records.

CAUTION: Each time you run this process, it resets all FISAP flags to the default data values. Consequently, you should not run this process after you manually enter FISAP data.

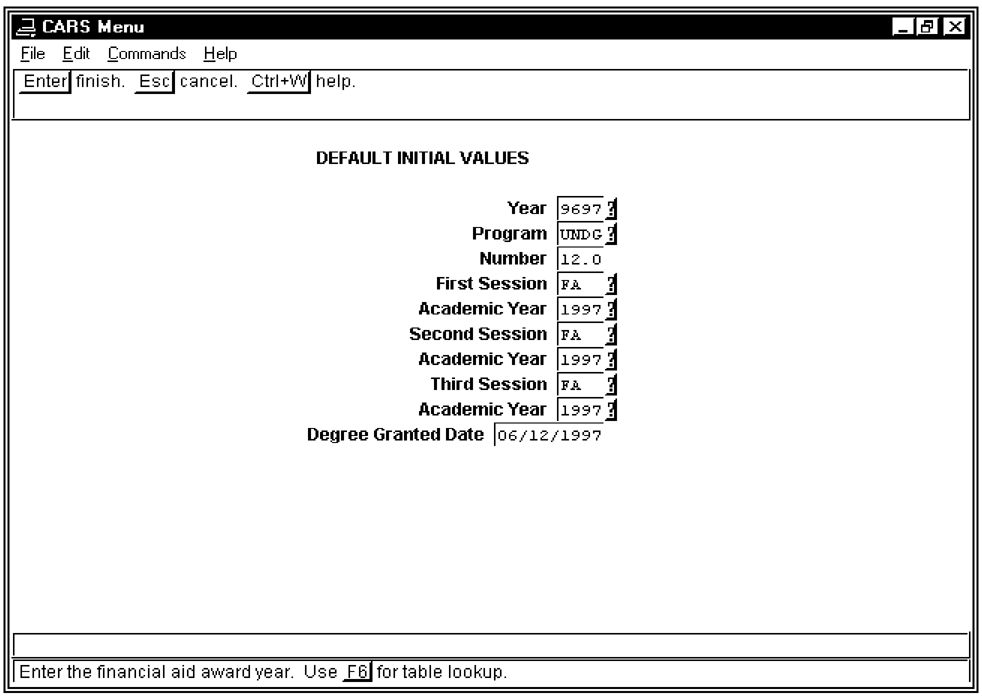
Access

Access the Default Initial Values screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Reports
2. FISAP
3. Default Initial Values

Example

Following is an example of the Default Initial Values screen.



Fields

The following list describes the fields that appear on the Default Initial Values screen.

Academic Year `(all fields)`
The calendar year (yyyy) associated with the respective session that you want to process. Use **Table Lookup** for a list of valid years.

Degree Granted Date

The latest date that students may have received a Baccalaureate or first professional degree. The Baccalaureate Degree field will be updated to Y if the student received a Baccalaureate or first professional degree prior to or on the date passed.

First Session
The first session in which aid has been awarded that you want to process (e.g., FA for fall). Use **Table Lookup** for list of valid sessions.

Number
The minimum number of hours required for full-time enrollment (e.g., 12.0).

Program
A code identifying the program you want to process. Defaults to UNDG (undergraduate). Use **Table Lookup** for a list of valid codes.

Second Session
The second session in which aid has been awarded that you want to process (e.g., FA for fall). Use **Table Lookup** for list of valid sessions.

Third Session
The third session in which aid has been awarded that you want to process (e.g., FA for fall). Use **Table Lookup** for list of valid sessions.

Year
The financial aid award year that you want to process (e.g., 9697). Defaults to the previous year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Create FISAP Records screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Enrollment Variance Screen

Purpose

The Enrollment Variance screen enables you to produce a variance report for up to three financial aid award codes.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

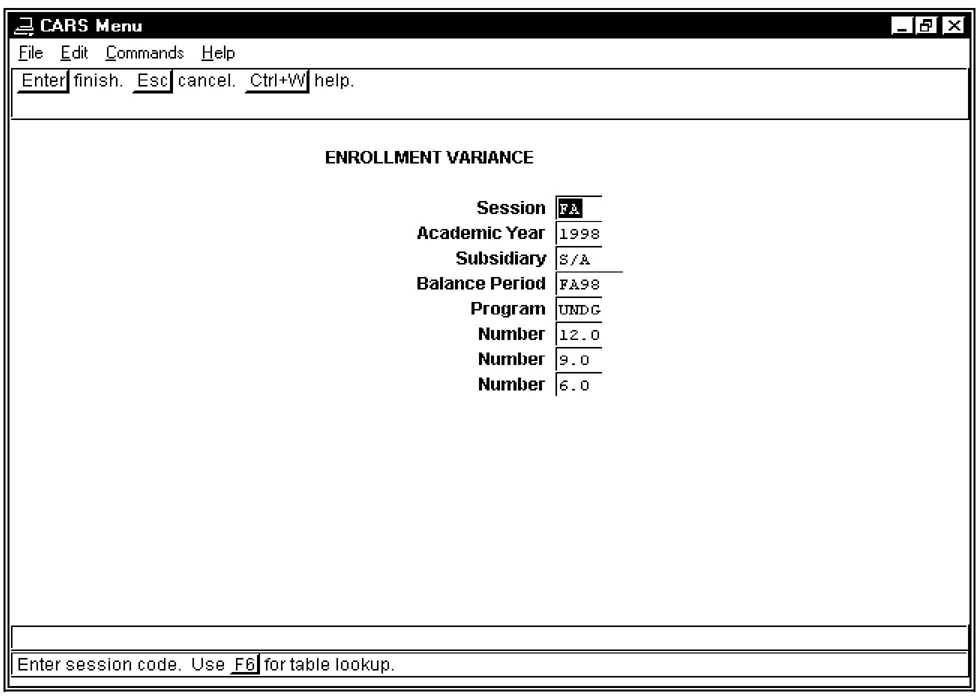
Access the Enrollment Variance screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Reports
2. Aid
3. Enrollment Variance

Note: Entering a password may be necessary when selecting Aid.

Example

Following is an example of the Enrollment Variance screen.



Fields

The following list describes the fields that appear on the Enrollment Variance screen.

Academic Year
The calendar year (yyyy) to be considered for the report. Use **Table Lookup** for a list of valid years.

Balance Period

A code identifying the balance period (e.g., FA98 for Fall 1998) to be considered for the report. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Number (Half Time Hours)
The number of enrolled hours required for a student to be considered in attendance half of the time. Defaults to 6.0.

Number (Minimum Hours)
The minimum number of enrolled hours required for a student to be considered a full-time student. Defaults to 12.0.

Number (Three Quarter Time Hours)
The number of enrolled hours required for a student to be considered in attendance three fourths of the time. Defaults to 9.0.

Program
A code identifying the program to be considered for the report. Defaults to UNDG (undergraduate). Use **Table Lookup** for a list of valid codes.

Session
The session to be considered for the report. Defaults to FA (fall). Use **Table Lookup** for a list of valid sessions.

Subsidiary
A code identifying the subsidiary to be considered for the report. Defaults to S/A (Student Accounts). Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Enrollment Variance screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Financial Aid Entry Program Parameters Screen

Purpose

The Financial Aid Entry Program Parameters screen enables you to enter specific information, such as the award year and current session, if you want to begin a processing session in Financial Aid Entry or if you are processing historical financial aid.

Access

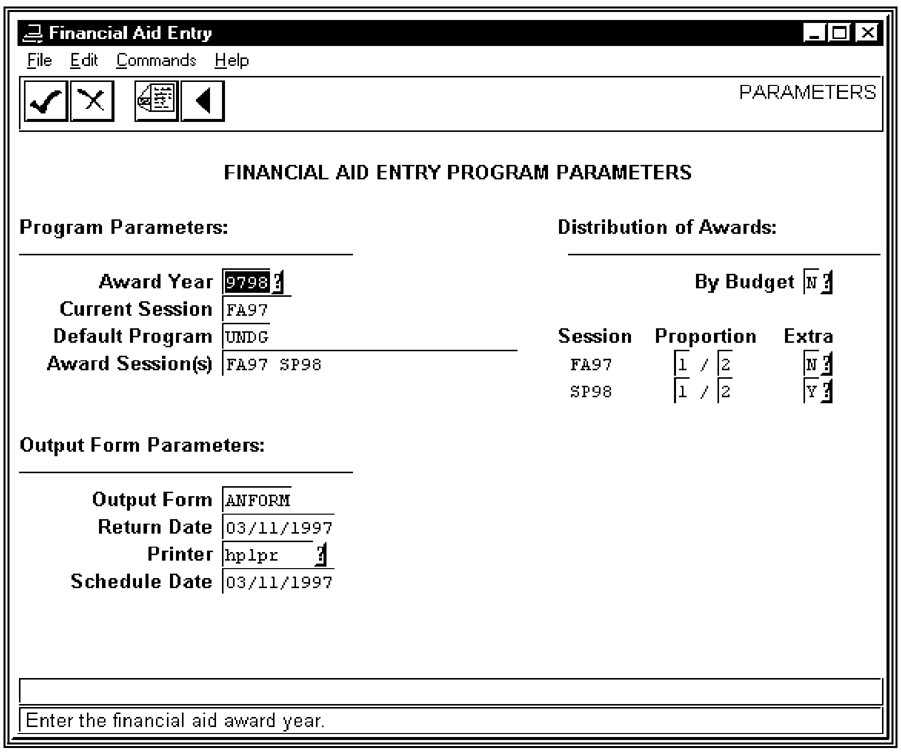
Access the Financial Aid Entry Program Parameters screen by selecting the following, beginning at the Financial Aid Main menu:

1. Student Processing
2. Financial Aid Entry
3. At the Financial Aid Entry screen, select **Finish**

Note: Other paths may exist.

Example

Following is an example of the Financial Aid Entry Program Parameters screen.



Fields

The following list describes the fields that appear on the Financial Aid Entry Program Parameters screen.

Award Session(s)

The session(s) for which you want to display and enter financial aid awards (e.g., FA96 SP97). Defaults to the sessions defined in the system setup. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).

Note: If you select **Cumulative History** to work with historical financial aid, the system automatically enters the following historical codes in the field:
- PREV **-** To include financial aid received at your institution prior to implementation of CX.
- XFR **-** To include financial aid received at a transfer institution.

Award Year

The financial aid award year for which you are processing awards (e.g., 9697). Defaults to the current year. Use **Table Lookup** for a list of valid years.

Note: If you select **Cumulative History** to work with historical financial aid, the system automatically enters the historical code HIST in the field.

By Budget

A code indicating whether aid is to be distributed according to each session's budget amount (Y) or not (N).

Note: If you enter **Y**, Financial Aid Entry uses the expense budget proportions for each session when determining the distribution of aid. If you enter **N**, it uses the award ratios that appear Proportion field.

Current Session

The current academic session (e.g., FA96), according to your institution's academic calendar. Defaults to the current session.

Default Program

A code identifying the academic program for which you want to process awards (e.g., UNDG). Defaults to the program defined in the system setup.

Note: If you select **Cumulative History** to work with historical financial aid, the system automatically enters the historical code HIST in the field.

Extra

A code indicating whether the session should have any remaining dollar amounts applied when an award cannot be evenly distributed across all sessions (Y) or not (N).

Note: If you enter **Y** in the By Budget field, the system ignores the Proportion field, and uses the value in this field to identify the session to receive any remaining dollar amount.

Output Form

A code identifying the award notification form (e.g., ANFORM) to use when you:
- Select **Output** from the Financial Aid Entry screen to print an award notification form immediately.
- Select **Schedule** from the Financial Aid Entry screen to add an award notification form contact to the student's Contact record.

Note: When you select either command, the system gives you an opportunity to change the value in this field.

Printer

The name of the printer from which to produce the award notification form or financial aid transcript. Use **Table Lookup** for a list of valid printers.

Proportion

The ratio of financial aid distributed for the award session. Defaults to equally distribute awards for each award session processed. You can change the ratios to any fractional amount as long as the total equals one (e.g., 1/2 plus 1/2 equals 1).

Return Date

The date (mm/dd/yyyy) to be printed on the award notification form as the date that the student must return the form to your Financial Aid office. Defaults to the current date.

Note: Financial Aid Entry uses the field only if you select **Output** to print an award notification form immediately.

Schedule Date

The due date (mm/dd/yyyy) to batch process award notification forms. Defaults to the current date.

Note: You can use this field to delay printing award notification forms for selected students or to print the forms for a group of students. The Select Award Notices batch process selects students with award notification forms scheduled for printing on or before the date entered.

Session

The award session(s) you entered in the Award Session(s) field. This is a display-only field.

Note: If you select **Cumulative History** to work with historical financial aid, the system automatically enters the following historical codes in the field:

- PREV - To include financial aid received at your institution prior to implementation of CX.
- XFR **-** To include financial aid received at a transfer institution.

Commands

The following lists the commands you can execute from the Financial Aid Entry Program Parameters screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Cumulative History

Displays historical codes in specific fields enabling you to add and maintain historical financial aid records.

Note: This command switches with **Session Awards**.

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Lookup

Accesses a **Table Lookup** window listing valid codes or values from which you can choose.

Session Awards

Displays session codes in specific fields enabling you to work with current financial aid records by session.

Note: This command switches with **Cumulative History**.

Financial Aid Entry Screen

Purpose

The Financial Aid Entry screen enables you to:

- Access the Financial Aid Need Analysis program
- Check disbursed aid information
- Access the interactive Financial Aid Packaging processes, if available
- Check fund balance information
- Enter initial aid awards
- Enter cumulative history information
- Modify existing aid awards
- Perform compliance checking
- Schedule or print award notification forms
- Maintain and print financial aid transcripts

Access

Access the Financial Aid Entry Query screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Financial Aid Entry
3. Select **Finish**
4. Enter the desired parameters and select **Finish**

Other Financial Aid Programs

By selecting the following commands on the Financial Aid Entry screen, you can access other financial aid programs that relate to Financial Aid Entry:

- **Need** - To access the Financial Aid Need Analysis program

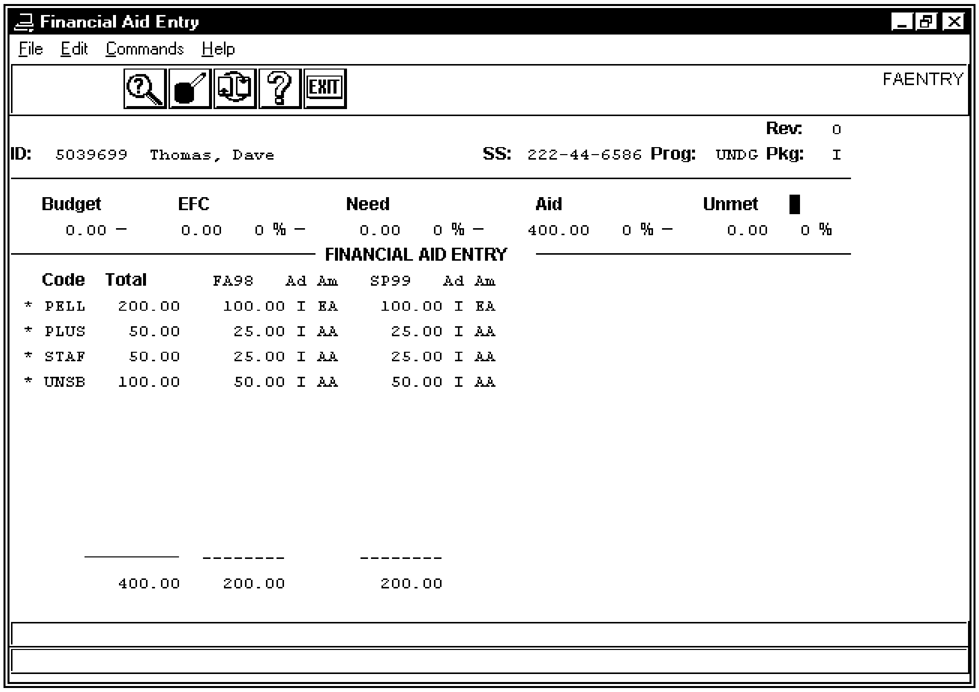
  Note: For more information, see the *Financial Aid Need Analysis User Guide*.

- **Package** - To access the interactive Financial Aid Packaging program

  Note: If the Financial Aid Packaging program is not enabled, this command is not available. For more information, see the *Financial Aid Packaging User Guide*.

Example

Following is an example of the Financial Aid Entry screen.



Segments

The Financial Aid Entry screen is divided into three segments:

- The Header segment provides information about the student.
- The Need segment displays information about the student's financial aid requirements. The values displayed depend on the methodology appearing to the right of the Unmet field.
- The Aid segment displays information about the financial aid awards that the student has received.

Fields on the Header Segment

The following list describes the fields that appear on the Header segment of the Financial Aid Entry - ID Query screen.

Note: The system maintains all fields, which are display-only.

ID

The system-generated number identifying the student in the database (e.g., 5039699). The student's name appears to the right (e.g., Thomas, Dave).

Pkg

A code identifying the student's financial aid package status. Valid codes are:

- A (Package accepted by student)
- D (Denied by college)
- H (Hold disbursement of package)
- I (Intended package)
- N (Nullified by college)
- P (Pending student acceptance)
- R (Rejected by student)

Prog

A code identifying the student's academic program (e.g., UNDG for undergraduate).

Rev

The revision number of the last award notification form printed (e.g., 0).

SS

The student's social security number (e.g., 222-44-6586).

Fields on the Need Segment

The following list describes the fields that appear on the Need segment of the Financial Aid Entry screen.

Note: The system maintains all fields, which are display-only.

Aid

The total dollar amount of financial aid awarded to the student (e.g., 0.00), and the percentage of the need it represents (e.g., 0%).

Budget

The total dollar amount of all estimated costs of attendance that the student must pay (e.g., 0.00).

EFC

The total dollar amount of the Estimated Family Contribution (e.g., 0.00), and the percentage of the budget it represents.

(Financial Aid Need Analysis Form Record/Method)

This is an unlabeled field located to the right of the Unmet field. A code identifying the Need Analysis Form record or methodology to which the information is associated. Defaults to the primary methodology that appears in the Primary FC field on the Need Analysis Information screen. If this field is blank, the system searches for the primary methodology from the Financial Aid Methodology Selection window. For more information, see the *Financial Aid Need Analysis User Guide*.

Need

The total dollar amount of the student's need (e.g., 0.00), and the percentage of the budget it represents (0%) calculated using the formula: Budget minus EFC.

Unmet

The total dollar amount of unmet expenses (e.g., 0.00) and the percentage of the need it represents (0%) calculated using the formula: Need minus Aid.

Fields on the Aid Segment

The following list describes the fields that appear on the Aid segment of the Financial Aid Entry screen.

Note:

- The sessions displayed depend on the session codes you entered in the Financial Aid Entry Program Parameters screen, a maximum of four, and whether or not you are working with current and/or historical aid.
- An asterisk (*) appears to the left of each award for which the student does not meet compliance.

Ad

A code identifying the individual aid status for each award for each session. Valid codes are:

- A (Award accepted by student)
- C (Campus-authorized disbursement)
- H (Hold disbursement of award)
- I (Intended award)
- N (Nullified by college)
- P (Pending student acceptance)

- R (Rejected by student)
- V (Verified award)

Note: The system ignores this field if you are entering cumulative history information (i.e., if you selected **Cumulative History** on the Financial Aid Entry Program Parameters screen).

(Aid ID)

This is an unlabeled field that appears at the bottom of the Aid segment if an award is associated with a specific donor who is offering the award. For example, an individual who has set up a scholarship fund. The Aid ID number is used to track the disbursement of the award. The field appears only if the cursor is on the associated award line and you select **Aid ID**, or if you are entering such an award. Use **<Ctrl-u>** to look up the ID number.

Am

A code identifying the aid amount status of the aid for each session. Valid codes are:

- AA (Actual award not yet disbursed)
- EA (Estimated award amount)

When the aid is disbursed, the system updates the field and enters one of the following codes:

- AD (Actual award totally disbursed)
- AP (Actual award partially disbursed; this code is used when the award amount has been increased or decreased after the aid was disbursed to the student's account)

Note: This field switches to the Pk field when you select **Toggle**. The system ignores this field if you are entering cumulative history information (i.e., if you selected **Cumulative History** on the Financial Aid Entry Program Parameters screen).

Code

A code identifying the type of aid (e.g., PLUS). Use **Table Lookup** for a list of valid codes.

FA*YY*

The session in which the aid was awarded and the amount awarded for the session (e.g., for the code PLUS, 25.00 has been awarded for the Fall 1998 session).

Note: This field appears if you selected **Session Awards** on the Financial Aid Entry Program Parameters screen. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).

(Grand Total)

This is an unlabeled field located at the bottom of the screen below the Total field. The grand total dollar amount of all aid awarded (e.g., 200.00).

Pk

A code identifying the packaging method status of the aid for each session. Valid codes are:

- A (Allow computer to package)
- M (Manually packaged only)
- P (Computer packaged aid)

Note: This field switches to the Am field when you select **Toggle**. The packaging method status is available only if the interactive Financial Aid Packaging product is available. The system ignores this field if you are entering cumulative history information (i.e., if you selected **Cumulative History** on the Financial Aid Entry Program Parameters screen).

PREV

The cumulative amount of the aid awarded to the student in a session prior to the implementation of CX.

Note: This field appears if you selected **Cumulative History** on the Financial Aid Entry Program Parameters screen.

(Session Total)
This is an unlabeled field located at the bottom of the screen below each session field (i.e., the FA*YY* and SP*YY* fields). The total dollar amount of all aid awarded for each session (e.g., 200.00 has been awarded for the Fall 1998 session and 200.00 for the Spring 1999 session).

SP*YY*
The session in which the aid was awarded and the amount awarded for the session (e.g., for the code PLUS, 25.00 has been awarded for the Spring 1999 session).

Note: This field appears if you selected **Session Awards** on the Financial Aid Entry Program Parameters screen. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).

Total
The total dollar amount of the aid awarded (e.g., for the code PLUS, a total of 50.00 has been awarded) for the displayed sessions and award year.

XFER
The cumulative amount of the aid awarded to the student while attending another institution.

Note: This field appears if you selected **Cumulative History** on the Financial Aid Entry Program Parameters screen.

Commands

The following lists the commands you can execute from the Financial Aid Entry screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Add-Line
In Update mode, creates a blank line in the Aid segment enabling you to add aid.

Aid ID
In Update mode, enables you to enter an aid ID number which identifies the specific donor who is offering the award. For example, an individual who has set up a scholarship fund. The aid ID number is used to track the disbursement of the award.

Note: You can only use this command if the cursor is on the associated award line. Otherwise, the message "Cannot enter aid ID number. Aid Table does not allow usage of this field." appears in the comment line.

Cancel
Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close

Enables you to exit from the current screen or window.

Compliance

Accesses the Compliance Requirements screen enabling you to view the student's compliance results for an award.

Del-Line

In Update mode, enables you to delete aid, if it has not yet been disbursed/posted.

Detail

In Update mode, accesses the Aid by Enrollment Status List window enabling you to add or update the total amount of financial aid awarded to the student based on the student's current enrollment status for each session.

Note: This command is only available if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

Disbursed

Accesses the Award Disbursements screen enabling you to view the student's awarded aid and the amount of each award that has been disbursed in total and for each session.

Display ID-Type

In Query mode, displays the view-only ID Type/Associated Records window containing information about the student. The window contains a variety of logical (Y/N) fields; the codes in the fields vary, depending on the types of records that exist in CX for the student. For example:

- If the student has a Donor record, the Donor field contains Y.
- If the student has a Financial Aid record, the Financial Aid field contains Y.

Exit

Enables you to leave the current screen or program.

Fa-Trans

Accesses the Financial Aid Transcript Information screen enabling you to view, update, and/or print financial aid transcript information for the student.

Finish

In Update mode, saves your field entries when you have completed your data entry or selection and want to continue.

Finished

In Query mode, saves your field entries when you have completed your selection and want to continue.

Funds

Accesses the Current Fund Balances screen enabling you to view the current financial aid fund balances information.

Help

Displays help information about the associated screen or process.

Initialize

Accesses the Financial Aid Entry Program Parameters screen enabling you to view and/or update the program parameters you entered earlier.

Lookup

In Update mode, accesses a **Table Lookup** window listing valid codes or values from which you can choose.

Method

Accesses the Financial Aid Methodology Selection window enabling you to select another methodology.

Need

Accesses the Need Analysis Information screen of the Financial Aid Need Analysis program enabling you to view and/or update a variety of financial aid information for the student.

Note: For more information about the Financial Aid Need Analysis program, see the *Financial Aid Need Analysis User Guide*.

Output

Enables you to print an award notification form immediately.

Package

Accesses the Packaging Detail screen enabling you to simulate and interactively package the student's financial aid awards for the year.

Note: If the Financial Aid Packaging product is not enabled, this command is not available. For more information, see the *Financial Aid Packaging User Guide*.

Query

Does one of the following:

- Enables you to enter an ID or social security number to search for an ID record.
- In Query mode, accesses the ID Query screen enabling you to enter additional search criteria (e.g., name, social security number, etc.) and narrow the search for an ID record.

Schedule

Enables you to add an award notification form contact to the student's Contact record for later batch production of award notification forms.

Scroll-Screens

Enables you to select the following commands to access the corresponding windows with additional information relating to the student:

- **Ctc-Info** – Accesses the Contact List window enabling you to view the student's Contact records.
- **Holds-Info** - Access the Holds window enabling you to view the student's hold information.
- **Svc-Info** - Accesses the Support Services window enabling you to view or manage the student's support services information.

Text

Accesses the Comments screen enabling you to view, add, delete, and update any text comments associated with the student's financial aid information.

Note: If a comment exists for the student or after you enter a comment, the word TEXT appears highlighted to the left of the Rev field.

Toggle

Switches the display of the Am (aid amount statuses) field and Pk (packaging method statuses) field on the Aid segment.

Update

Enables you to add and/or update financial aid awards and statuses.

Verify-Comp

Enables you to verify the student's compliance for all displayed awards.

Note: An asterisk (*) appears to the left of each award for which the student does not meet compliance.

Financial Aid Methodology Selection Window

Purpose

The Financial Aid Methodology Selection window is a view-only window that enables you to select the financial aid need analysis methodology and its associated records that you want to view on the Financial Aid Entry screen.

Note:
- You can also select the methodology that you want to use for your need analysis processing. For more information, see the *Financial Aid Need Analysis User Guide*.
- If the Financial Aid Packaging product is available, before you access it, you can select the appropriate need analysis methodology to use, such as FM (Federal Methodology) or FMS (Simple Federal Methodology). For more information, see the *Financial Aid Packaging User Guide.*

Access

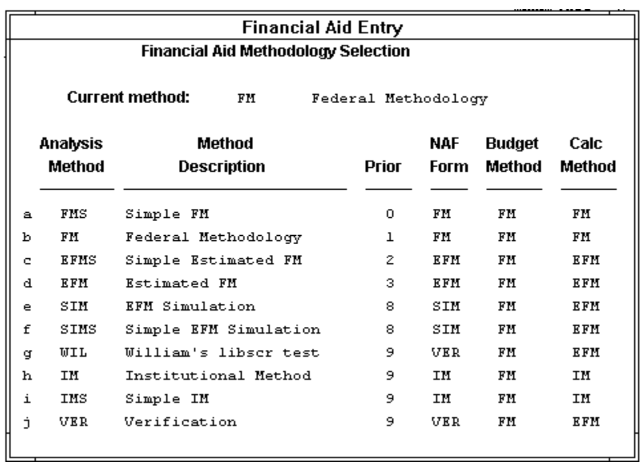
Access the Financial Aid Methodology Selection window by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. At the Financial Aid Entry Program parameters screen, enter the desired parameters and select **Finish**
2. Enter the desired student ID or social security number in the ID field, or perform a query to find the student and select **Finished**
3. Select **Method** under **Commands**

Example

Following is an example of the Financial Aid Methodology Selection window.


Financial Aid Entry

Financial Aid Methodology Selection

Current method: FM Federal Methodology

	Analysis Method	Method Description	Prior	NAF Form	Budget Method	Calc Method
a	FMS	Simple FM	0	FM	FM	FM
b	FM	Federal Methodology	1	FM	FM	FM
c	EFMS	Simple Estimated FM	2	EFM	FM	EFM
d	EFM	Estimated FM	3	EFM	FM	EFM
e	SIM	EFM Simulation	8	SIM	FM	EFM
f	SIMS	Simple EFM Simulation	8	SIM	FM	EFM
g	WIL	William's libscr test	9	VER	FM	EFM
h	IM	Institutional Method	9	IM	FM	IM
i	IMS	Simple IM	9	IM	FM	IM
j	VER	Verification	9	VER	FM	EFM

Fields

The following list describes the fields that appear on the Financial Aid Methodology Selection window.

Note: The system maintains all fields, which are display-only. This information is defined in the Need Analysis Method table (fameth_table).

Analysis Method

The codes for the available financial aid need analysis methodologies (e.g., FMS for Simple FM).

Note: Each methodology is assigned a letter, shown to the left, which you use to select one (e.g., in the screen example, FMS is assigned the letter a).

Budget Method
The methodology associated with the financial aid need budget (e.g., FM).

Calc Method
The methodology used to calculate the financial aid need (e.g., FM).

Current method
The current methodology or record being viewed and its description (e.g., FM Federal Methodology). This information appears in the (Financial Aid Need Analysis Form Record/Method) field on the Financial Aid Entry screen.

Method Description
The descriptions of the available financial aid need analysis methodology codes.

NAF Form
The Need Analysis Form (NAF) associated with the financial aid need budget (e.g., FM).

Prior
The priority of the methodology, with zero as the highest priority.

Commands

The following lists the commands you can execute from the screen and their purposes.

Abort
Enables you to exit from the Financial Aid Methodology Selection window without making a selection.

Backward
Enables you to move back one screen of data if additional screens exist.

Forward
Enables you to move forward one screen of data if additional screens exist.

Return
Enables you to exit from the Financial Aid Methodology Selection window without making a selection.

Select Method
Enables you to select the methodology to use.

Note: To select a methodology, type the letter assigned to the code (e.g., in the screen example, you would type **a** to select FMS).

Financial Aid Transcript Information Screen

Purpose

The Financial Aid Transcript Information screen enables you to view, update, and/or print financial aid transcript information for a student. This screen contains information used for the production of the student's financial aid transcript.

Access

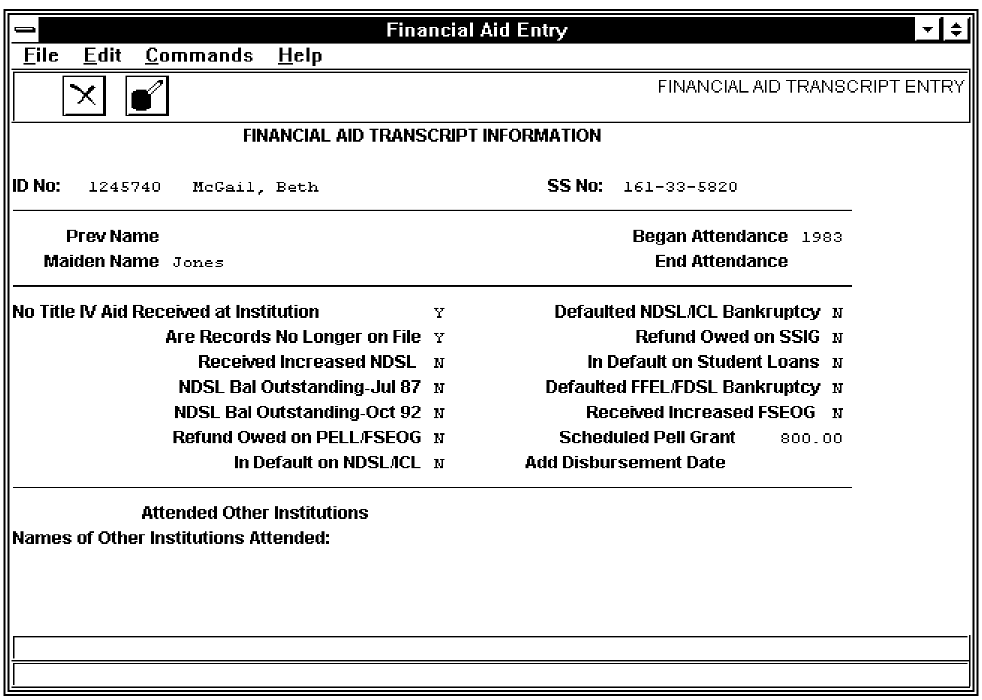
Access the Financial Aid Transcript Information screen by selecting the following, beginning at the Financial Aid Entry Screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Fa-trans** under **Commands**.

Example

Following is an example of the Financial Aid Transcript Information screen.



Fields

The following list describes the fields that appear on the Financial Aid Transcript Information screen.

Note: All fields become active when you select **Update**, unless otherwise noted.

Add Disbursement Date
The date (mm/dd/yyyy) of additional disbursements to the student.

Are Records No Longer on File

A code indicating whether the transcript pertains to years for which records are no longer available (Y) or not (N).

Note: Current federal law mandates that an institution keep the student's records on file for five years.

Attended Other Institutions
A code indicating whether the student attended other institutions (Y) or not (N).

Began Attendance
The year that the student began attending your institution (e.g., 1983).

Defaulted FFEL/FDSL Bankruptcy
A code indicating whether the defaulted FFEL or FDSL has been discharged in bankruptcy (Y) or not (N).

Defaulted NDSL/ICL Bankruptcy
A code indicating whether one or more of the following defaulted loans has been discharged in bankruptcy (Y) or not (N).

- Federal Perkins Loan
- ICL (Income Contingent Loan)
- NDSL (National Direct Student Loan)

End Attendance
The year (yyyy) that the student last attended your institution.

ID No
The system-generated number identifying the student in the database (e.g., 1245740). A display-only field, the student's name appears to the right.

In Default on NDSL/ICL
A code indicating whether the student is in default on one or more of the following loans (Y) or not (N).

- Federal Perkins Loan
- ICL (Income Contingent Loan)
- NDSL (National Direct Student Loan)

In Default on Student Loans
A code indicating whether the student is in default on one or both of the following loans (Y) or not (N).

- FDSL (Federal Direct Student Loan)
- FFEL (Federal Family Education Loan)

Maiden Name
The student's maiden name (e.g., Jones), if applicable.

Names of Other Institutions Attended
The name(s) of other institution(s) that the student previously attended.

NDSL Bal Outstanding-Jul 87
A code indicating whether the student has an outstanding NDSL (National Direct Student Loan) balance on or before July 1, 1987, at your institution (Y) or not (N).

NDSL Bal Outstanding-Oct 92
A code indicating whether the student has an outstanding NDSL (National Direct Student Loan) balance on or before October 1, 1992, at your institution (Y) or not (N).

No Title IV Aid Received at Institution
A code indicating whether the student did not receive/benefit from Title IV at you institution (Y) or not (N).

Prev Name

The first and last name previously used by the student at your institution, if applicable.

Received Increased FSEOG
A code indicating whether the student received increased FSEOG due to study abroad (Y) or not (N).

Received Increased NDSL
A code indicating whether the student received increased Federal Perkins Loan/NDSL (Y) or not (N).

Refund Owed on PELL/FSEOG
A code indicating whether the student owes a refund on one or more of the following aid awards (Y) or not (N).

- FSEOG (Federal Supplemental Educational Opportunity Grant)
- NDSL (National Direct Student Loan)
- Pell (Federal Pell Grant)

Refund Owed on SSIG
A code indicating whether the student owes a refund on an SSIG (State Student Incentive Grant) due to overpayment (Y) or not (N).

Scheduled Pell Grant
The total dollar amount of the student's Pell award for the current year (e.g., 800.00).

SS No
The student's social security number (e.g., 161-33-5820). This is a display-only field.

Commands

The following lists the commands you can execute from the Financial Aid Transcript Information screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command.
- Returns to the previous command.
- Exits from the current screen or window.

Close
Enables you to exit from the current screen or window.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Loans
Accesses the Financial Aid Transcript History screen enabling you to view and update the student's financial aid transcript loan history information.

Lookup
Accesses a **Table Lookup** window listing valid codes or values from which you can choose.

Output
Enables you to print the financial aid transcript form.

Update
Enables you to update the student's financial aid transcript information.

Financial Aid Transcript Loan History Screen

Purpose

The Financial Aid Transcript Loan History screen enables you to view and update a student's financial aid transcript loan history information.

Access

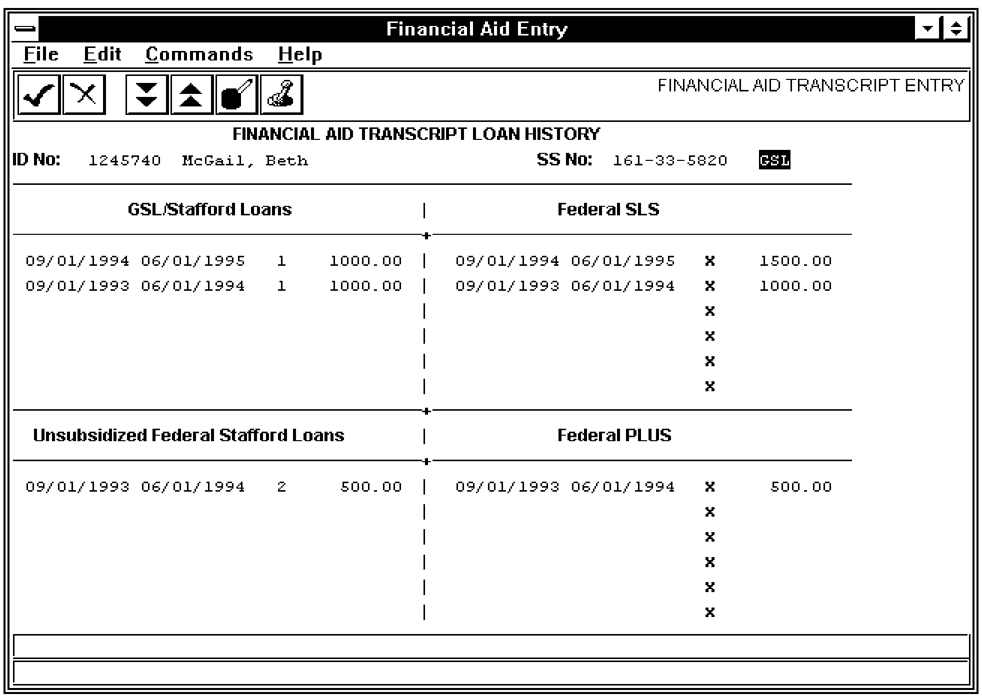
Access the Financial Aid Transcript Loan History screen by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Fa-trans** under **Commands**.
3. Select **Loans** under **Commands**.

Example

Following is an example of the Financial Aid Transcript Loan History screen.



Fields

The following list describes the fields that appear on the Financial Aid Transcript Loan History screen.

Note: This screen shows loan history information for the following four loans. Each area or Loan record includes the same fields, unless otherwise noted.

- Federal PLUS
- Federal SLS
- GSL/Stafford Loans
- Unsubsidized Federal Stafford Loans

Note: All fields become active when you select **Update**, unless otherwise noted.

(Beginning Date)
This is an unlabeled field located to the far left in each area. The beginning date for the loan period (e.g., 09/01/1993).

(Ending Date)
This is an unlabeled field located to the right of the (Beginning Date) field in each area. The ending date for the loan period (e.g., 06/01/1994).

(Grade Level)
This is an unlabeled field located to the right of the (Ending Date) field in the GSL/Stafford Loans and the Unsubsidized Federal Stafford Loans areas. A code identifying the student's grade level for the loan period (e.g., 1)

ID No
The system-generated number identifying the student in the database (e.g., 1245740). A display-only field, the student's name appears to the right.

(Loan)
This is an unlabeled field located to the right of the SS No field. A code identifying the loan you will update if you select the **Update** command, or the loan you are currently updating. The following codes identify the corresponding loans:

- GSL (GSL/Stafford Loans)
- UN_GSL (Unsubsidized Federal Stafford Loans)
- SLS (Federal SLS)
- PAR_PLUS (Federal PLUS)

(Loan Amount)
This is an unlabeled field located to the far right in each loan area. The total dollar amount of the loan for the loan period (e.g., 1,000.00).

SS No
The student's social security number (e.g., 161-33-5820). This is a display-only field.

Commands

The following lists the commands you can execute from the Financial Aid Transcript Loan History screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Add
In Update mode, enables you to create another Loan record.

Back
In Update mode, enables you to move back one screen of data if additional screens exist.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close
Enables you to exit from the current screen or window.

Delete

In Update mode, enables you to remove an existing Loan record.

Finish
In Update mode, saves your field entries when you have completed your data entry or selection and want to continue.

Forward
In Update mode, enables you to move forward one screen of data if additional screens exist.

Page Down
Enables you to move forward one screen of data if additional screens exist.

Page Up
Enables you to move back one screen of data if additional screens exist.

Section
Enables you to access another area or Loan record on the screen.

Update
Enables you to update the student's loan history information.

FISAP Data Entry Screen

Purpose

The FISAP Data Entry screen enables you to view and update the FISAP record for a student with financial aid posted in one of the following programs: Perkins Loan, the Supplemental Educational Opportunity Grant, or the Federal Work Study Program.

Access

Access the FISAP Data Entry screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Reports
2. FISAP
3. FISAP Data Entry
4. **Finish**

Example

Following is an example of the FISAP Data Entry screen.

```
PERFORM:   Query  Next  Previous  View  Add  Update  Remove  Table  Screen  .
Shows the next row in the Current List.         ** 2: stufa_rec table**
===================== ID, PROFILE, AND PROGRAM INFORMATION ==================
ID No.....[1000    ]    SS No.. 319-48-9649
Title..... MRS   Mrs.
Name...... Hood, Charles Edward             Telephone.. 513-874-6464
Address... Rt 1                             Program.... GRAD
           Apt. 337                         Class...... SR
City...... Falls Church                     Plan Grad..       0
State/Zip. OH  45056                        Deg Grant..       0

====================== STUDENT FINANCIAL AID INFORMATION ====================
Award Year....[9798]                      Fulltime.............[N]
Need Entered..[N]                         Total Income.........[   9,251.00]
In Attendance.[Y]                         Home Site............[CARS]
Dependent.....[D]                         Include In Report....[Y]
Aid Offered...[$5,000.00   ]              Package Group........[    ]
Zero EFC......[N]                         Baccalaureate Degree.[Y]

============================== FISAP INFORMATION ===========================
Award Code....                              Amount....... $
Program.......
```

Segments

The FISAP Data Entry screen is divided into three segments.

- The ID, Profile, and Program Information segment identifies the student whose FISAP data you are viewing.
- The Student Financial Aid Information segment provides detail information about the financial aid awards and payments.
- The FISAP Information segment provides detail information about the FISAP awards and payments.

Fields on the ID, Profile, and Program Information Segment

The following list describes the fields that appear on the ID, Profile, and Program Information segment of the FISAP Data Entry screen.

Note: The system maintains all fields, which are display-only.

Address

The street name of the student’s permanent address (e.g., Rt. 1). There are two lines in this field; the second is used if the entire address does not fit on the first (e.g., Apt. 337).

City
The city of the student’s permanent address (e.g., Falls Church).

Class
A code indicating the category in which your institution places a student at the time of acceptance (e.g., SR for senior).

Deg Grant
The session, year, and date (mm/dd/yyyy) of the student’s actual graduation from a specific program.

ID No
The system-generated number identifying the student in the database (e.g., 1000).

Name
The student’s full name (e.g., Hood, Charles Edward).

Plan Grad
The session and year of the student’s planned graduation from a specific program.

Program
A code identifying the student’s academic program (e.g., GRAD for graduate.)

SS No
The student’s social security number (e.g., 319-48-9649).

State/Zip
Consists of two fields: State (e.g., OH) and Zip Code (e.g., 45056) of the student’s permanent address.

Telephone
The student’s permanent area code and telephone number (e.g., 513-874-6464).

Title
The code and corresponding text indicating a student’s title (e.g., MRS for Mrs.).

Fields on the Student Financial Aid Information Segment

The following list describes the fields that appear on the Student Financial Aid segment of the FISAP Data Entry screen.

Aid Offered
The total amount of the student's financial aid awarded in the award year (e.g., $5,000.00).

Award Year
The financial aid award year for the FISAP report (e.g., 9798 for 1997-1998).

Baccalaureate Degree.
A Y (Yes) or N (No) indicating whether a dependent student has a baccalaureate or other professional degree.

Dependent
A code indicating whether the student is dependent (D) or independent (I).

Fulltime
A Y (Yes) or N (No) indicating whether the student is enrolled full-time.

Home Site

The location where the student attends classes. This field determines which site a student will be grouped with for reporting purposes (e.g., CX).

Note: Home Site records are generally used by institutions with more than one campus.

In Attendance
A Y (Yes) or N (No) indicating whether the student attended classes in the FISAP year.

Include In Report
A Y (Yes) or N (No) indicating whether you want this student included in the FISAP report.

Need Entered
A Y (Yes) or N (No) indicating whether a valid need analysis is complete for the student for the current FISAP year.

Package Group
A code identifying those students who are to be packaged as a group.

Note: For more information, see the *Financial Aid Need Analysis User Guide* and the *Financial Aid Packaging User Guide*.

Total Income
The student's total income (e.g., 9,251.00).

Zero EFC
A Y (Yes) or N (No) indicating whether the student meets the automatic Zero EFC (Expected Family Contribution) condition.

Fields on the FISAP Information Segment

The following list describes the fields that appear on the FISAP Information segment of the FISAP Data Entry screen.

Amount
The amount of aid appearing in the Award Code field that has been disbursed to the student for the FISAP report year.

Award Code
The FISAP award code (e.g., PERK, SEOG, or CWSP).

Program
A code identifying the student's academic program.

Note: This code should be the same as the Program code that appears in the ID, Profile, and Program Information segment.

Commands

The following list describes the commands you can execute from the FISAP Data Entry screen.

Note: You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

Add
Adds a row to the active database table.

Current
Displays the current row of the current table.

Detail

Selects a detail table of the current table.

Escape
In Query mode, searches the active database for records meeting your search criteria.

Exit
Returns to the CX menu.

Interrupt
Does one of the following:

- In Add mode, discards new data and exits the mode
- In Query mode, discards a query and exits the mode
- In Update mode, discards changes and exits the mode

Note: The keys (e.g., **<Ctrl-c>**) that correspond to the Interrupt command depend on the setup of your terminal.

Master
Selects the master table of the current table.

Next
Shows the next row in the current list.

Output
Outputs selected rows in form or report format.

Previous
Shows the previous row in the current list.

Query
Puts the screen into Query mode. Searches the active database table for rows that match the data you enter into one or more fields. If you do not enter any data, the system selects the entire database table beginning with the first row.

Remove
Deletes a row from the active database table.

Screen
Shows the next page of the form, if one exists.

Table
Selects the current table.

Update
Changes a row in the active database table.

View
Allows you to view, enter, or edit any comment associated with the student in a blob text field.

Note: CX gives you this message if no blob text fields exist for the student: "There are no BLOB fields to view."

Holds Window

Purpose

The Holds window is a view-only window that enables you to view a student’s hold information.

Access

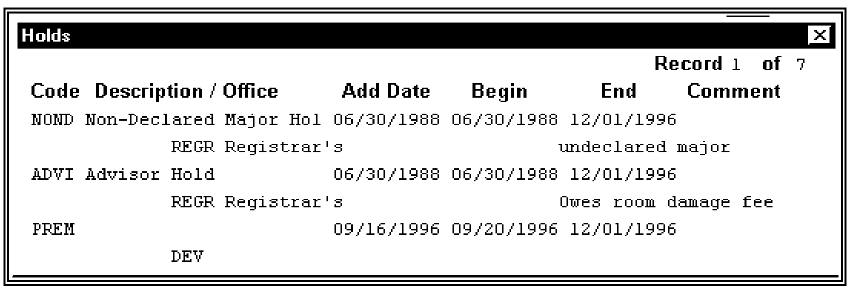
Access the Holds window from the Financial Aid Entry screen by selecting the following:

1. Scroll Screens
2. Holds-Info

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

Example

Following is an example of the Holds window.



Holds

Record 1 of 7

Code	Description / Office	Add Date	Begin	End	Comment
NOND	Non-Declared Major Hol	06/30/1988	06/30/1988	12/01/1996	
	REGR Registrar's			undeclared major	
ADVI	Advisor Hold	06/30/1988	06/30/1988	12/01/1996	
	REGR Registrar's			Owes room damage fee	
PREM		09/16/1996	09/20/1996	12/01/1996	
	DEV				

Fields

The following list describes the fields that appear on the Holds window.

Note: The system maintains all fields, which are display-only.

Add Date
The date that the Hold record was added (e.g., 06/30/1988).

Begin
The beginning date of the hold (e.g., 06/30/1988).

Code
A code identifying the type of hold (e.g., NOND).

Comment
This field is located below the End field. Any comment associated with the Hold record (e.g., undeclared major).

Description/Office
These are two fields. The first field, located to the left of the Code field, is the description of the type of hold (e.g., Non-Declared Major Hol). The second field, located directly below, is the office that placed the hold (e.g., REGR Registrar’s).

End
The ending date of the hold (e.g., 12/01/1996).

Record

The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 7 indicates you are viewing the first of seven total records).

Commands

The following lists the commands you can execute from the screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Next
Enables you to move forward one screen of data if additional screens exist.

Previous
Enables you to move back one screen of data if additional screens exist.

Label Parameters Window

Purpose

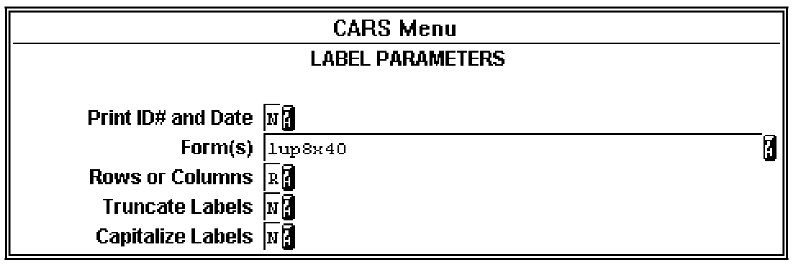
Many of the processes relating to Financial Aid result in a Label Parameters window. This window appears throughout CX when you are creating letters and/or labels, and lets you specify certain parameters for creating address labels.

Access

The Label Parameters window automatically appears on the screen for specific processes. The window appears when you have completed your data entry or selection and want to continue by selecting **Finish**.

Example

Following is an example of the Label Parameters window.



Fields

The following list describes the fields that appear on the Label Parameters window.

Capitalize Labels
A code indicating whether you want to capitalize the names and addresses on the labels (Y) or not (N).

Note: Used primarily for bulk mailings.

Form(s)
A code identifying the form(s) to use for the labels (e.g., 1up5x35 which represents a sheet of one column of labels, up to 5 lines per label, and no more than 35 characters per line). Use **Table Lookup** for a list of valid codes.

Note: If a valid code has two forms listed (e.g., 3up5x35 1up8x40), the system saves any label too long for the first form in another file which you can print later on the larger label. If you select such a code, enter **N** in the Truncate Labels field.

Print ID# and Date
A code indicating whether you want to print the ID number and date on the first line of each label (Y) or not (N).

Rows or Columns
A code indicating whether you want to print the output in row (R) or column (C) format.

Truncate Labels
A code indicating whether you want to truncate (cut-off) the labels so they fit the form used (Y) or not (N).

Note: If you entered two forms in the Form(s) field, enter **N**.

Commands

The following lists the commands you can execute from the screen and their purposes.

Note: You select one of these commands after you enter data into the fields on the Label Parameters window.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

Output Parameters and Scheduling Window

Purpose

Many of the processes relating to Financial Aid result in an Output Parameters and Scheduling window. This window appears throughout CX when you are ready to execute a program or produce a report. The Output Parameters and Scheduling window allows you to run these processes in the background so you can continue to use your PC or terminal for other work. You change the fields in the window so the program executes according to your needs. After the system completes the process, it sends you a message regarding its completion status by e-mail.

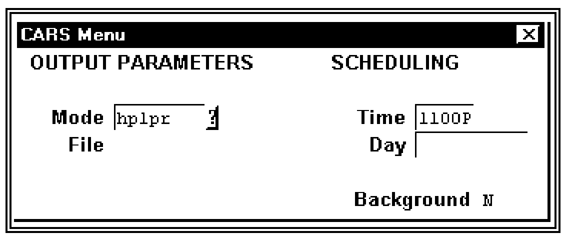
Note: For more information about this window, see the *Getting Started User Guide*.

Access

The Output Parameters and Scheduling window automatically appears on the screen for specific processes. The window appears when you have completed your data entry or selection and want to continue by selecting **Finish**.

Example

Following is an example of the Output Parameters and Scheduling window.



Fields

The following list describes the fields that appear on the Output Parameters and Scheduling window. Access to all fields depends on the process you are running or the data entered in other fields. For example, you will be able to access the Mode field for a process that produces a report, but not for a process that schedules a review. The cursor will appear only in fields in which you may enter data. For more information about the Output Parameter and Scheduling window, see the Jenzabar CX guide the *Getting Started User Guide*.

Background

A code indicating whether you want to run the process in the background. Valid codes are:

- **Y** (Runs the process in the background and allows you to use your PC or terminal for other work).
- **N** (Runs the process in the foreground and does not allow you to use your PC or terminal for other work).

Day

The day of the week or date the process will run. You can enter a weekday (e.g., **Wednesday**) or a date (e.g., **Jan 1**). The process will always run on the day or date you enter unless you change it. Leave this field blank to run the process on the current day.

Note: You must enter the weekday or date in lower-case letters.

File

The name of the file in your home directory to which the system sends the output, if you do not send it to a printer or to the screen.

Note: If you enter **file** in the Mode field, you can enter a filename in this field. If you leave this field blank, the system will use the application name with an *.out* extension as the filename.

Mode

The name of the printer from which to produce the output. Use **Table Lookup** for list of valid values.

Note: Enter **more** to send the output to the screen so you can view it. Enter **file** to send the output to a file. If you enter **file**, you can enter a filename in the File field.

Time

The time of day the process should run.

Note: Enter **NOW** to run it immediately.

Commands

The following lists the commands you can execute from this window and their purposes.

Note: You select one of these commands after you enter data into the fields on the Output Parameters and Scheduling window.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and what to continue.

When the menu reappears, if you entered **NOW** in the Time field, “Exist” will appear next to the menu option Tasks. Otherwise, “Are Queued” will appear next to the menu option Sched Procs. The process will execute at the day and time you specify and will send e-mail informing you the process is complete.

Help

Displays help information about the associated screen or process.

Post Refunds-Contacts Screen

Purpose

The Post Refunds-Contacts screen enables the system to post refundable financial aid from Student Accounts (S/A) to Student Refunds (S/R) for every contact the system adds when you run the Refund-Contacts process. You can post refundable aid from multiple types of financial aid.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

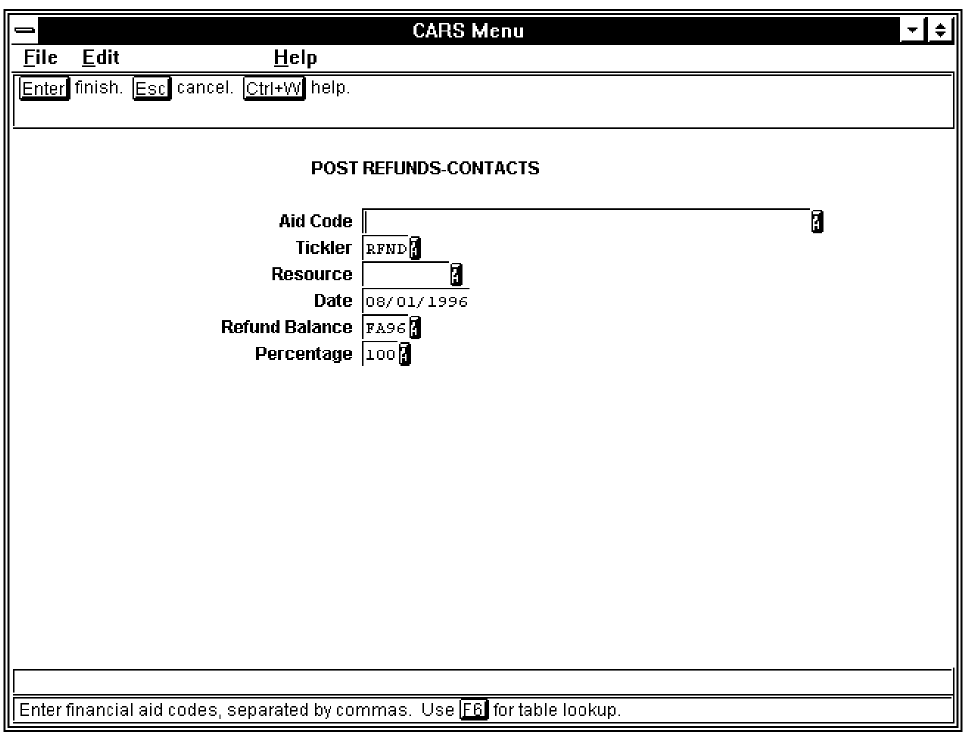
Access the Post Refunds-Contacts screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Post Refunds-Contacts

Note: The screen is only available if the Refund by Contact macro (ENABLE_FEAT_RFND_CTC) is enabled. If Post Refunds-Contacts is not an option on your Refundable Aid Menu, contact your Jenzabar coordinator.

Example

Following is an example of the Post Refunds-Contacts screen.



Fields

The following list describes the fields that appear on the Post Refunds-Contacts screen.

Aid Code

The code(s) identifying the type(s) of financial aid for which you want to post refundable amounts. Use **Table Lookup** for a list of valid codes.

Note: If you enter more than one code, separate each with a comma.

Date
The due date (mm/dd/yyyy) for the refund contact. Defaults to the current date. The system uses this date to select expected contacts with a due date less than or equal to the date entered.

Percentage
The percentage of excess financial aid to be refunded (e.g., 100). This determines the amount to be moved/posted from the Student Accounts (S/A) to the Student Refunds (S/R). For example, if you make two payments in a term-percentage, enter **50** as the first payment, then **100** to refund the remaining amount.

Refund Balance
A code identifying the balance period (e.g., FA96) used to post refund amounts. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Resource
A code identifying the refund contact the system added when you ran the Refund-Contacts process. Use **Table Lookup** for a list of valid codes.

Tickler
A code identifying the tickler to which the refund contact is associated. Defaults to RFND. Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Post Refunds-Contacts screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Post Refunds-ID Screen

Purpose

The Post Refunds-ID screen enables the system to post refundable financial aid from Student Accounts (S/A) to Student Refunds (S/R) for the ID number you specify or for all qualifying ID numbers. You can post refundable aid from multiple types of financial aid.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

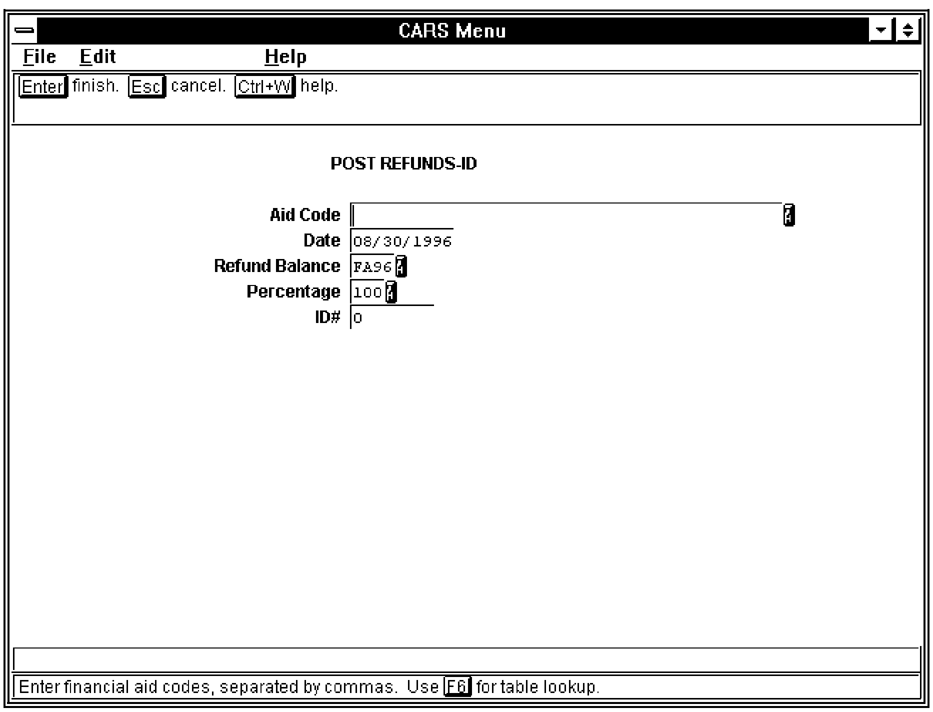
Access the Post Refunds-ID screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Post Refunds-ID

Note: The screen is only available if the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) is enabled. If Post Refunds-ID is not an option on your Refundable Aid Menu, contact your Jenzabar coordinator.

Example

Following is an example of the Post Refunds-ID screen.



Fields

The following list describes the fields that appear on the Post Refund-ID screen.

Aid Code

The code(s) identifying the type(s) of financial aid for which you want to post refundable amounts. Use **Table Lookup** for a list of valid codes.

Note: If you enter more than one code, separate each with a comma.

Date
The date (mm/dd/yyyy) the refund payment should occur.

ID#
The ID number of the student who is to receive the refund, or enter **0** (zero) for all qualifying students.

Percentage
The percentage of excess financial aid to be refunded (e.g., 100). This determines the amount to be moved/posted from the Student Accounts (S/A) to the Student Refunds (S/R). For example, if you make two payments in a term-percentage, enter **50** as the first payment, then **100** to refund the remaining amount.

Refund Balance
A code identifying the balance period (e.g., FA96) used to post refund amounts. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Post Refunds-ID screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Print Award Notices Screen

Purpose

The Print Award Notices screen enables you to print the financial aid award notices that the system creates when you run the Select Award Notices process. This is the final step in generating financial aid award notices and utilizes the Form Production System (FPS) of CX. All form production processes use FPS.

For details on how to use the Print Award/Cover Letters screen to print, see *Creating Award Notification Cover Letters* in this guide.

Note: You must run the Select Award Notices process before you run this process.

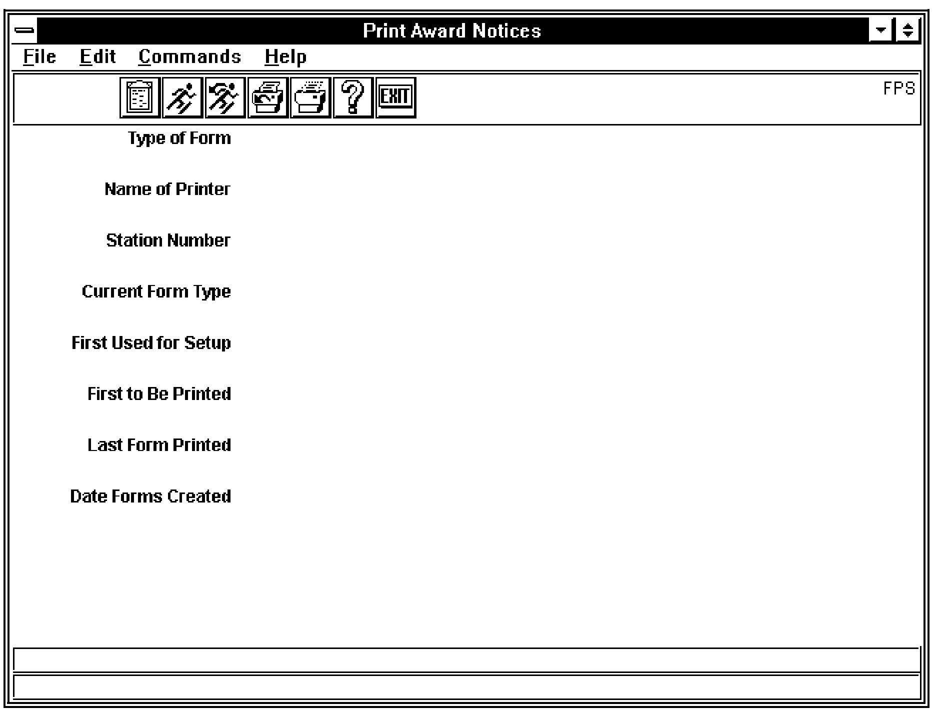
Access

Access the Print Award Notices screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Award/Cover Letters
3. Print Award Notices
4. At the Print Award Notices screen, select **Finish**

Example

Following is an example of the Print Award Notices screen.



Fields

The following list describes the fields that appear on the Print Award Notices screen.

Current Form Type

A code identifying the current type of form to be printed (e.g., anform). The system enters this information depending on the form you enter in the Type of Form field.

Date Forms Created
The date and time the forms were created. This is a display-only field.

(First Form Identifier)
This is an unlabeled field located to the right of the First to Be Printed field. The number identifying the first form printed. The system enters this information.

First to Be Printed
The physical form number of the first form to be printed. The system enters this information.

First Used for Setup
The first physical form number of the form used to ensure it will print correctly. The system enters this information and assumes it is used to ensure the forms are properly aligned and is therefore voided.

Note: Award notices do not use this field.

(Last Form Identifier)
This is an unlabeled field located to the right of the Last Form Printed field. The number identifying the last form printed. The system enters this information.

Last Form Printed
The physical form number of the last form to be printed. The system enters this information.

Name of Printer
The name of the printer from which to produce forms. Use **Table Lookup** for a list of valid printers.

Station Number
The Station number for the forms. Defaults to 0.

Note: Generally, award notices do not use this field.

Type of Form
A code identifying the type of form to be printed (e.g., anform). Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Print Award Notices screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Again
Enables you to print another copy of previously printed forms, using the original form numbers, with a “void” message on the forms.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

Draft

Enables you to print a draft copy of the form, using no form numbers, with a “void” message on the forms.

Exit
Enables you to quit the program and return to the menu.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Formtype
Enables you to select the type of form to print.

Help
Displays help information about the associated screen or process.

Lookup
Accesses a window listing valid form types waiting to be printed from which you can choose.

Page Backward
Enables you to move back one screen of data if additional screens exist.

Page Forward
Enables you to move forward one screen of data if additional screens exist.

Restart
Enables you to restart the printer after a printer error.

Note: You must contact your Jenzabar coordinator to use this command.

Start
Enables you to start printing forms.

Print Award/Cover Letters Screens - Current Status Segment

Purpose

The Print Award/Cover Letters screens enable you to print the award cover letters that the system creates when you run the Create Cover Letters process. This is the final step in printing award cover letters and utilizes the Letter Production System (LPS) of CX. All letter production processes use LPS.

The Current Status segment provides information about the subtype (e.g., letters or envelopes) you selected to print.

Note: You must run the Create Cover Letters process before you run this process.

Access

Access the Print Award/Cover Letters screens by selecting the following, beginning at the Financial Aid: Student Processing menu:

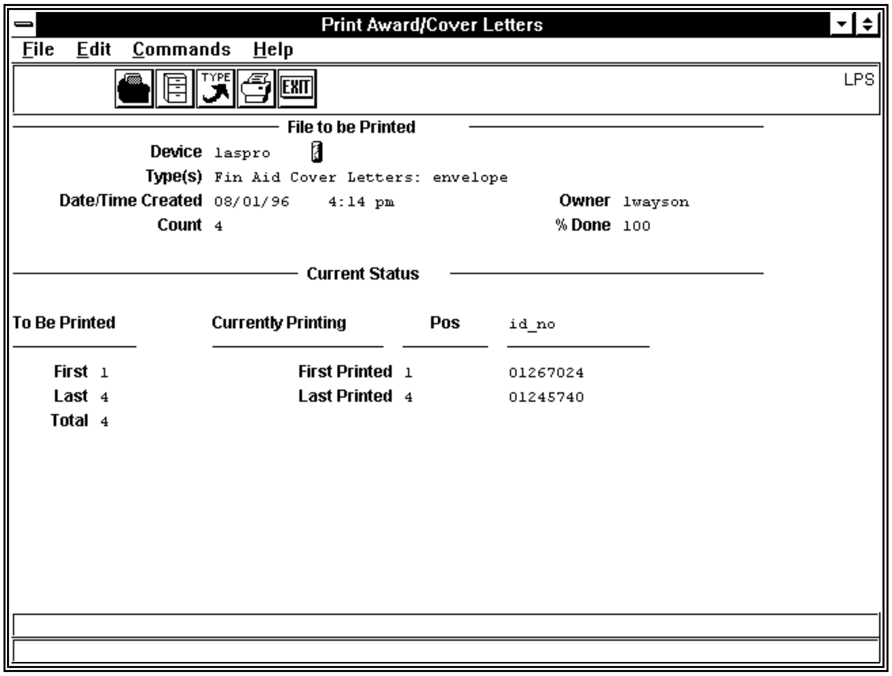
1. Award/Cover Letters
2. Print Award/Cover Letters
3. **Finish**
4. Enter the information in the appropriate fields on the Print Award/Cover Letters screen in the Print Log segment.
5. **Done**.
6. Enter a printer name in the Device field.
7. **Done** (if necessary)
8. **Start Printing**

Note: For more information about printing letters, see *Printing Letters* in the *Communications Management User Guide*.

Example

Following is an example of the Print Award/Cover Letters screen with the Current Status segment.

Note: The complete Print Award/Cover Letters screen occupies four screens. For more information about these screens, see the *Print Award/Cover Letters Screens* (with each segment) in this section.



Segments

The Print Award/Cover Letters screen with the Current Status segment is divided into two segments:

- The File to Be Printed segment provides information about the file you selected to print. This segment appears in the same area on each screen and does not change. However, the information that appears in the fields changes depending on the information you entered in the fields on the preceding screens.
- The Current Status segment provides information about the subtype (e.g., letters or envelopes) you selected to print.

Fields on the File to Be Printed Segment

For a list of the fields that appear on the File to Be Printed segment of the Print Award/Cover Letters screens and their descriptions, see the *Print Award/Cover Letters Screens - Files to Be Printed Segment* in this section.

Fields on the Current Status Segment

The following list describes the fields that appear on the Current Status segment of the Print Award/Cover Letters screens.

Note: The system maintains all fields, which are display-only. Subtype refers to what you selected to print from the Subtypes to Be Printed segment (e.g., letters or envelopes).

Currently Printing
Displays information about what was printed.

First
The first subtype printed (e.g., 1).

First Printed
The first subtype printed (e.g., 1).

id_no

The first and last ID number associated with the subtype printed (e.g., 01267024 and 01245740).

Last
The last subtype printed (e.g., 4).

Last Printed
The last subtype printed (e.g., 4).

Pos
The first and last subtype printed (e.g., 1 and 4).

To Be Printed
The first, last, and total number of the subtype printed (e.g., 1, 4, and 4).

Total
The total number of the subtype printed (e.g., 4).

Commands

The following is the list of commands that you can execute from the Print Award/Cover Letters screen with the Current Status segment and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Device
Enables you to select the printer from which to produce the output.

Exit
Does one or both of the following:

- Quits the current screen
- Exits the program

File
Enables you to select the file from the Files to Be Printed segment that you want to print.

Print
Not used on this screen. You must select the **File** command first.

Subtype
Not used on this screen. You must select the **File** command first.

Print Award/Cover Letters Screens - Files to Be Printed Segment

Purpose

The Print Award/Cover Letters screens enable you to print the award cover letters that the system creates when you run the Create Cover Letters process. This is the final step in printing award cover letters and utilizes the Letter Production System (LPS) of CX. All letter production processes use LPS.

The Files to Be Printed segment enables you to select the file you want to print.

> **Note:** You must run the Create Cover Letters process before you run this process.

Access

Access the Print Award/Cover Letters screens by selecting the following, beginning at the Financial Aid: Student Processing menu:

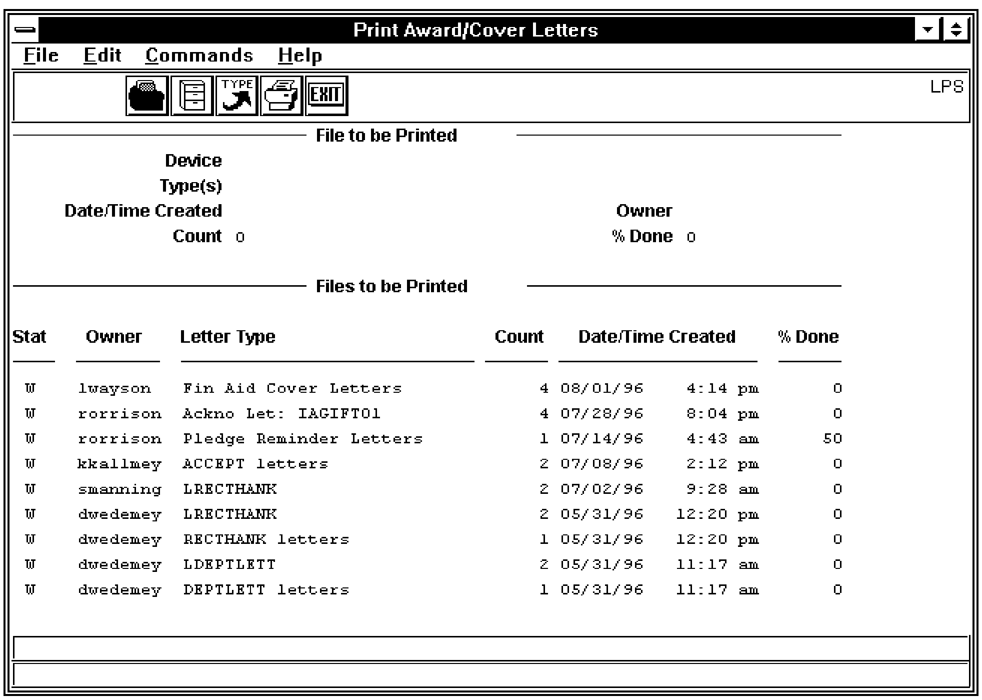
1. Award/Cover Letters
2. Print Award/Cover Letters
3. **Finish**

> **Note:** For more information about printing letters, see *Printing Letters* in the *Communications Management User Guide*.

Example

Following is an example of the Print Award/Cover Letters screen with the Files to Be Printed segment.

> **Note:** The complete Print Award/Cover Letters screen occupies four screens. For more information about these screens, see the *Print Award/Cover Letters Screens* (with each segment) in this section.



Segments

The Print Award/Cover Letters screen with the Files to Be Printed segment is divided into two segments:

- The File to Be Printed segment provides information about the file you selected to print. This segment appears in the same area on each screen and does not change. However, the information that appears in the fields changes depending on the information you enter in the fields on the subsequent screens.
- The Files to Be Printed segment displays a list of files that contain letters and envelopes, or labels to be printed.

Fields on the File to Be Printed Segment

The following list describes the fields that appear on the File to Be Printed segment of the Print Award/Cover Letters screens.

Note: The system maintains all fields, which are display-only, unless otherwise noted.

Count
The number of letters and envelopes, or labels in the file to be printed.

Date/Time Created
The date and time the file was created.

Device
The name of the printer from which to produce the output. Use **Table Lookup** for list of valid printers.

Type(s)
The file to be printed and the subtype selected to print.

Owner
The login name of the person who created the file.

% Done
The percentage of the file that has been printed.

Fields on the Files to Be Printed Segment

The following list describes the fields that appear on the Files to Be Printed segment of the Print Award/Cover Letters screens.

Note: The system maintains all fields, which are display-only.

Count
The number of letters and envelopes, or labels in the file to be printed (e.g., 4).

Date/Time Created
The date and time the file was created (e.g., 08/01/96 4:14 pm).

Letter Type
The file and its contents to be printed (e.g., Fin Aid Cover Letters).

Note: The system designates label-only files with an “L” in front of the filename (e.g., LRECTHANK). The Count field for this type of file always shows one more than the actual number of labels created because the system creates an additional label identifying the label file. Otherwise, the field displays a description of the file followed by “letters” (e.g., Fin Aid Cover Letters) which includes letters and envelopes.

Owner

The login name of the person who created the file (e.g., lwayson).

% Done

The percentage of the file that has been printed (e.g., 0).

> **Note:** If a file contains letters and envelopes, and only the letters were printed, 50 would appear in this field. This indicates that 50 percent of the file had been printed earlier (i.e., the letters) but not the envelopes.

Stat

A code identifying the status of the file. Valid codes are:

- D (Done printing)
- P (Print this file)
- R (Remove)
- W (Waiting to be printed)

Commands

The following lists the commands you can execute from the Print Award/Cover Letters screen with the Files to Be Printed segment and their purposes.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Device

Enables you to select the printer from which to produce the output.

Done

Saves your field entries when you have completed your data entry or selection and want to continue.

Down

Enables you to move forward one line at a time in the list.

Exit

Does one or both of the following:

- Quits the current screen
- Exits the program

File

Enables you to select the file to be printed.

Page Backward

Enables you to move back one screen of data if additional screens exist.

Page Forward

Enables you to move forward one screen of data if additional screens exist.

Print

Not used on this screen. You must select the **File** command first.

Subtype

Not used on this screen. You must select the **File** command first.

Up

Enables you to move back one line at a time in the list.

Print Award/Cover Letters Screens - Print Log Segment

Purpose

The Print Award/Cover Letters screens enable you to print the award cover letters that the system creates when you run the Create Cover Letters process. This is the final step in printing award cover letters and utilizes the Letter Production System (LPS) of CX. All letter production processes use LPS.

The Print Log segment provides information about the subtype you selected to print and enables you to select only a portion of the subtype to print, if necessary.

Note: You must run the Create Cover Letters process before you run this process.

Access

Access the Print Award/Cover Letters screens by selecting the following, beginning at the Financial Aid: Student Processing menu:

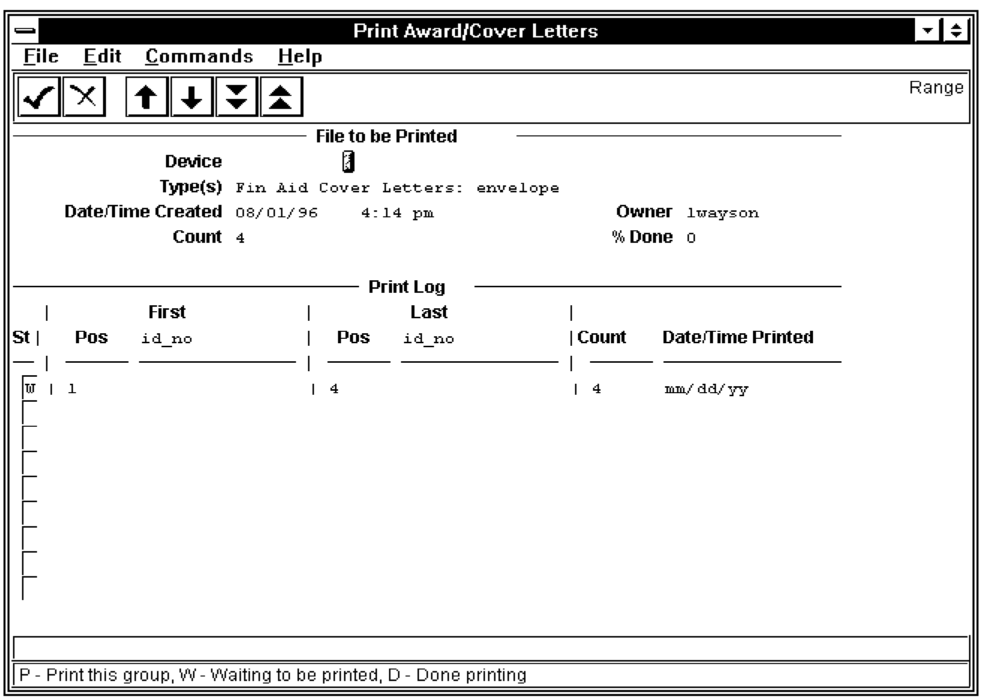
1. Award/Cover Letters.
2. Print Award/Cover Letters.
3. **Finish**.
4. Enter information in the appropriate fields on the Print Award/Cover Letters screen in the Subtypes to Be Printed segment.
5. **Done**.

Note: For more information about printing letters, see *Printing Letters* in the *Communications Management User Guide*.

Example

Following is an example of the Print Award/Cover Letters screen with the Print Log segment.

Note: The complete Print Award/Cover Letters screen occupies four screens. For more information about these screens, see the *Print Award/Cover Letters Screens* (with each segment) in this section.



Segments

The Print Award/Cover Letters screen with the Print Log segment is divided into two segments:

- The File to Be Printed segment provides information about the file you selected to print. This segment appears in the same area on each screen and does not change. However, the information that appears in the fields changes depending on the information you entered in the fields on the preceding screens.
- The Print Log segment provides information about the subtype you selected to print. You can select only a portion of the subtype to print, if necessary.

Fields on the File to Be Printed Segment

For a list of the fields that appear on the File to Be Printed segment of the Print Award/Cover Letters screens and their descriptions, see the *Print Award/Cover Letters Screens - Files to Be Printed Segment* in this section.

Fields on the Print Log Segment

The following list describes the fields that appear on the Print Log segment of the Print Award/Cover Letters screens.

Count
The total number of the subtype to be printed (e.g., 4).

Date/Time Printed
The date and time the subtype is to be printed.

First Pos
The first of the subtype to be printed (e.g., 1).

First id_no
The ID number of the first subtype to be printed.

Last Pos
The last of the subtype to be printed (e.g., 4).

Last id_no
The ID number of the subtype to be printed.

St
A code identifying the status of the subtype. Valid codes are:

- D (Done printing)
- P (Print this file)
- R (Remove)
- W (Waiting to be printed)

Commands

For a list of the commands that you can execute from the Print Award/Cover Letters screen with the Print Log segment and their purposes, see the *Print Award/Cover Letters Screens - Subtypes to Be Printed Segment* in this section.

Print Award/Cover Letters Screens - Subtypes to Be Printed Segment

Purpose

The Print Award/Cover Letters screens enable you to print the award cover letters that the system creates when you run the Create Cover Letters process. This is the final step in printing award cover letters and utilizes the Letter Production System (LPS) of CX. All letter production processes use LPS.

The Subtypes to Be printed segment provides information about the subtypes (e.g., letters and envelopes) in the file you selected to print and enables you to select which subtype you want to print.

Note: You must run the Create Cover Letters process before you run this process.

Access

Access the Print Award/Cover Letters screens by selecting the following, beginning at the Financial Aid: Student Processing menu:

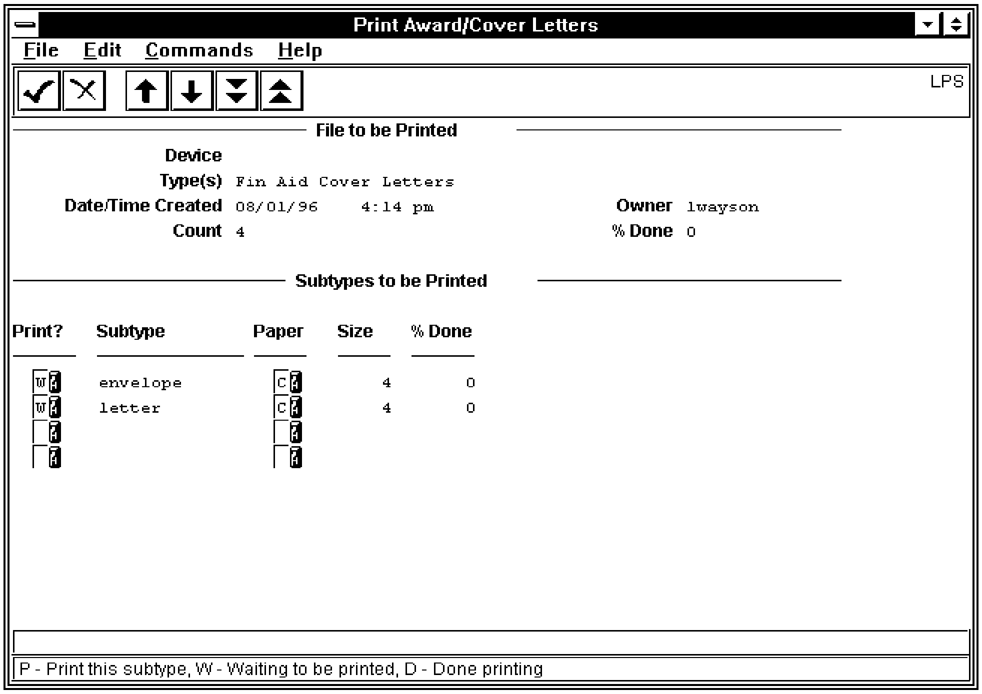
1. Award/Cover Letters.
2. Print Award/Cover Letters.
3. **Finish**.
4. Select the file(s) you want to print from the list on the Print Award/Cover Letters screen located in the Files to Be Printed segment.
5. **Done**.

Note: For more information about printing letters, see *Printing Letters* in the *Communications Management User Guide*.

Example

Following is an example of the Print Award/Cover Letters screen with the Subtypes to Be Printed segment.

Note: The complete Print Award/Cover Letters screen occupies four screens. For more information about these screens, see the *Print Award/Cover Letters Screens* (with each segment) in this section.



Segments

The Print Award/Cover Letters screen with the Subtypes to Be Printed segment is divided into two segments:

- The File to Be Printed segment provides information about the file you selected to print. This segment appears in the same area on each screen and does not change. However, the information that appears in the fields changes depending on the information you entered in the fields on the preceding screens.
- The Subtypes to Be Printed segment provides information about the subtypes (e.g., letters and envelopes) in the file you selected to print. You can select which subtype to print.

Fields on the File to Be Printed Segment

For a list of the fields that appear on the File to Be Printed segment of the Print Award/Cover Letters screens and their descriptions, see the *Print Award/Cover Letters Screens - Files to Be Printed Segment* in this section.

Fields on the Subtypes to Be Printed Segment

The following list describes the fields that appear on the Subtypes to Be Printed segment of the Print Award/Cover Letters screens.

Paper
A code indicating whether you want to print the output on continuous form (C) or single sheet (S) paper.

% Done
The percentage of the subtype that has been printed.

Note: For example, if all the envelopes in a file were printed, 100 would appear in this field for that subtype. This indicates that 100 percent of the envelopes have been printed.

Print

A code identifying the status of the subtype. Valid codes are:

- D (Done printing)
- P (Print this file)
- R (Remove)
- W (Waiting to be printed)

Size

The number of the subtype to be printed (e.g., 4).

Subtype

The type of contents in the file (e.g., letters or envelopes). The Subtype informs the printer of the size of the output.

Commands

The following lists the commands you can execute from the Print Award/Cover Letters screen with the Subtypes to Be Printed segment and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. The command line does not change for the subsequent screens.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Done

Saves your field entries when you have completed your data entry or selection and want to continue.

Down

Enables you to move forward one line at a time in the list of files or subtypes.

Page Backward

Enables you to move back one screen of data if additional screens exist.

Page Forward

Enables you to move forward one screen of data if additional screens exist.

Up

Enables you to move back one line at a time in the list of files or subtypes.

Print Text Comments Screen

Purpose

The Print Text Comments screen enables you to print text comments associated with a student's financial aid record(s).

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

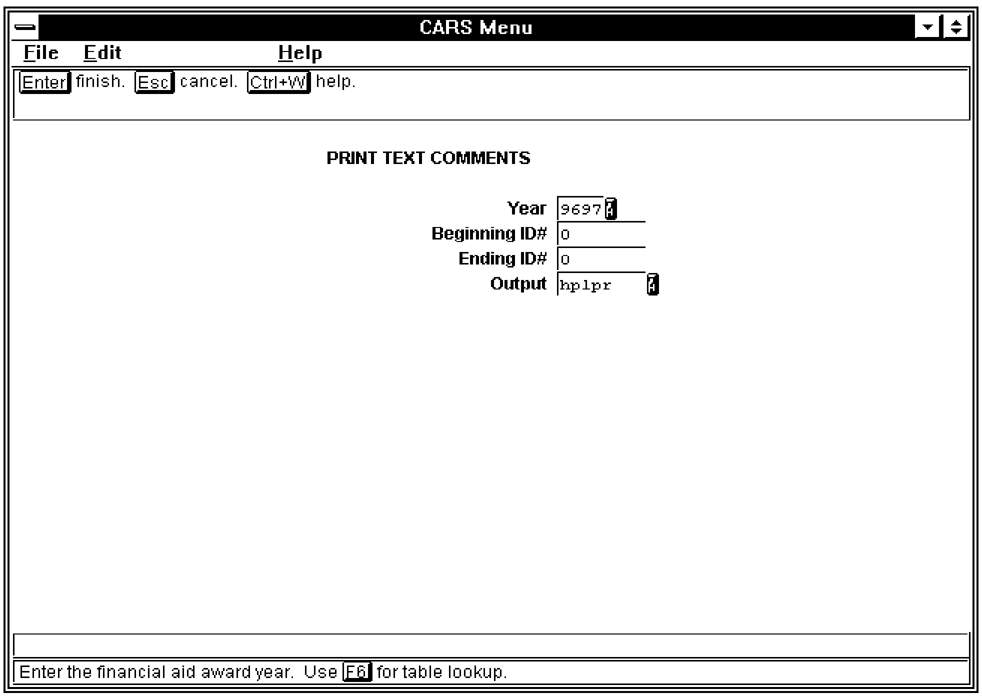
Access

Access the Print Text Comments screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Print Text Comments

Example

Following is an example of the Print Text Comments screen.



Fields

The following list describes the fields that appear on the Print Text Comments screen.

Beginning ID#
The first student's ID number in the range you want to print. Press **<F6>** to perform a query.

Ending ID#
The last student's ID number in the range you want to print. Press **<F6>** to perform a query.

Output

The name of the printer from which to produce the output. Use **Table Lookup** for a list of valid printers, or enter **more** to send the output to the screen.

Year

The financial aid award year (e.g., 9697). Defaults to the current award year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Print Text Comments screen and their purposes.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

Refund Check-Fund Screen

Purpose

The Refund Check-Fund screen enables you to produce a check register report of refund checks for financial aid, sorted by type of aid.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

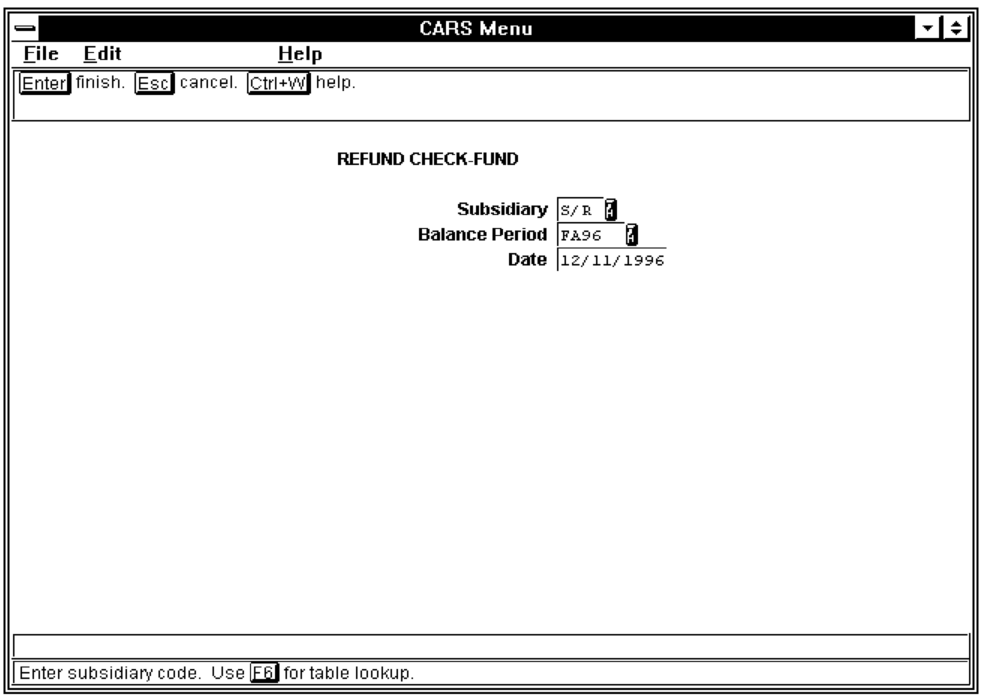
Access

Access the Refund Check-Fund screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports
4. Refund Check-Fund

Example

Following is an example of the Refund Check-Fund screen.



Fields

The following list describes the fields that appear on the Refund Check-Fund screen.

Balance Period
A code identifying the balance period (e.g., FA96) to be considered for the report. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Date
The date (mm/dd/yyyy) the checks will be run. Defaults to the current date.

Subsidiary

A code identifying the subsidiary to be considered for the report. Defaults to S/R (Student Refunds). Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Refund Check-Fund screen and their purposes.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

Refund Check-Student Screen

Purpose

The Refund Check-Student screen enables you to produce a check register report of refund checks for financial aid, sorted by ID number.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

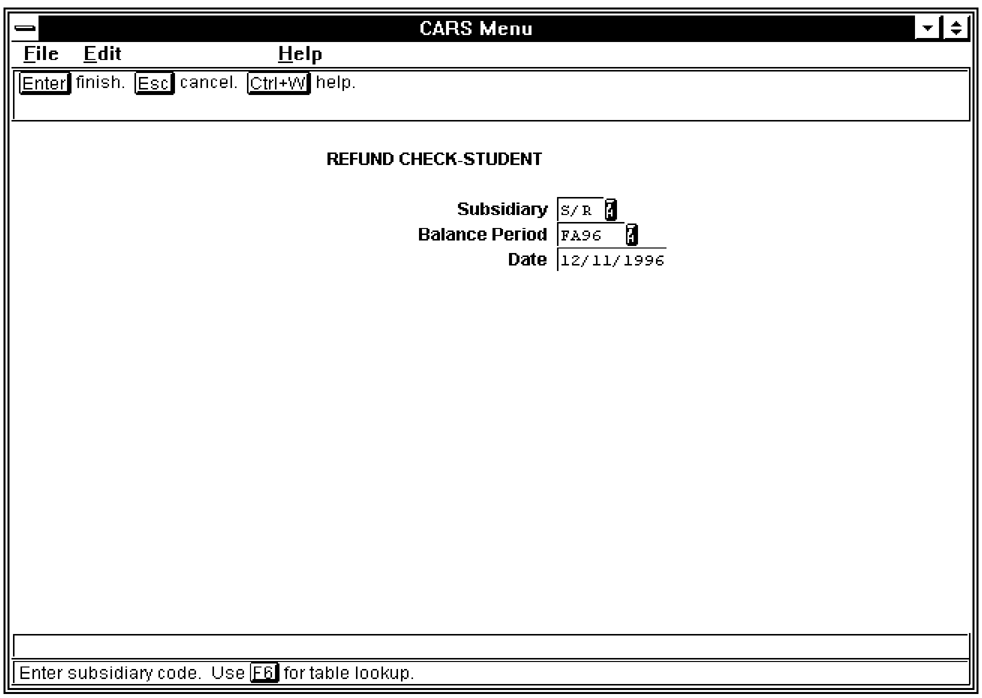
Access

Access the Refund Check-Student screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports
4. Refund Check-Student

Example

Following is an example of the Refund Check-Student screen.



Fields

The following list describes the fields that appear on the Refund Check-Student Report screen.

Balance Period
A code identifying the balance period (e.g., FA96) to be considered for the report. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Date
The date (mm/dd/yyyy) the checks will be run. Defaults to the current date.

Subsidiary

A code identifying the subsidiary to be considered for the report. Defaults to S/R (Student Refunds). Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Refund Check-Student screen and their purposes.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

Refund Eligible-Fund Screen

Purpose

The Refund Eligible-Fund screen enables you to produce the Expected Refund Proof List report listing all eligible refundable aid checks for the specified tickler and contact, sorted by the type of aid.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

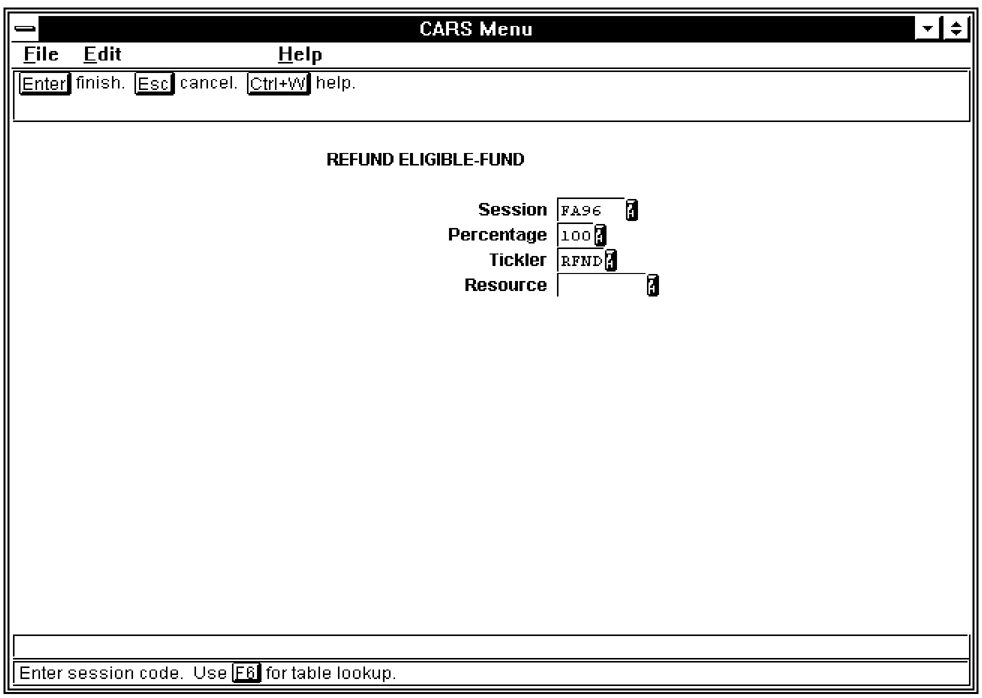
Access

Access the Refund Eligible-Fund screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports
4. Refund Eligible-Fund

Example

Following is an example of the Refund Eligible-Fund screen.



Fields

The following list describes the fields that appear on the Refund Eligible-Fund screen.

Percentage

The percentage of excess financial aid to be refunded which you want to reflect on the report. Defaults to 100.

Resource

A code identifying the refund contact the system added to the students' records in order for them to receive refund checks. Use **Table Lookup** for a list of valid codes.

Session

The session (e.g., FA96) for which the refund contact was added. Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Tickler

A code identifying the tickler to which the refund contact is associated. Defaults to RFND. Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Refund Eligible-Fund screen and their purposes.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

Refund Eligible-Student Screen

Purpose

The Refund Eligible-Student screen enables you to produce Expected Refund Proof List report listing all eligible refundable aid checks for the specified tickler and contact, sorted by the ID number.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

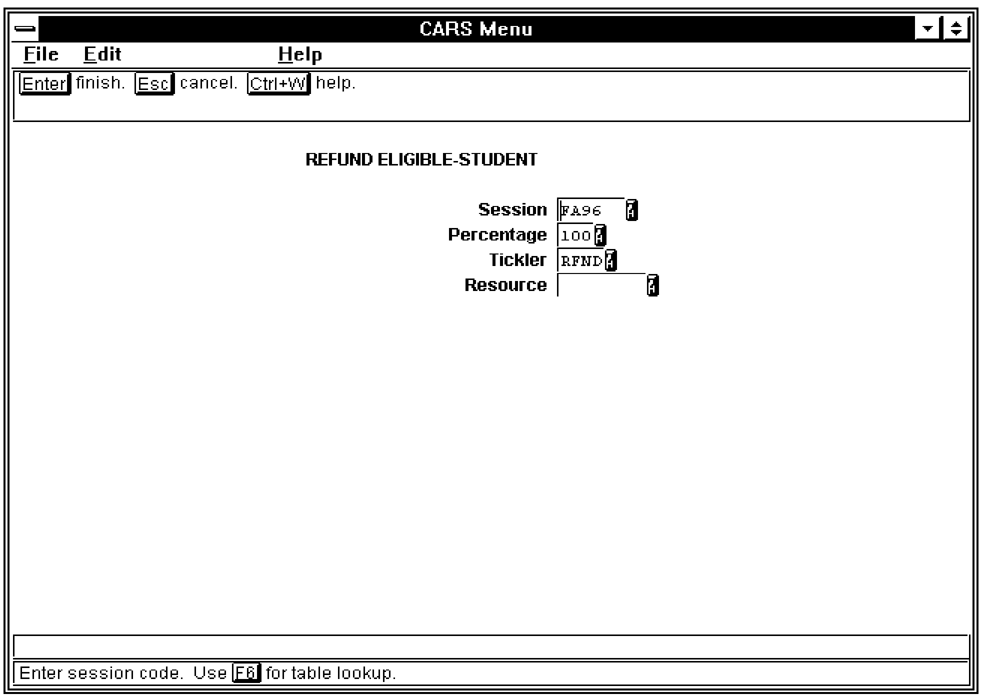
Access

Access the Refund Eligible-Student screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports
4. Refund Eligible-Student

Example

Following is an example of the Refund Eligible-Student screen.



Fields

The following list describes the fields that appear on the Refund Eligible-Student screen.

Percentage

The percentage of excess financial aid to be refunded which you want to reflect on the report. Defaults to 100.

Resource

A code identifying the refund contact the system added to the students' records in order for them to receive refund checks. Use **Table Lookup** for a list of valid codes.

Session
The session (e.g., FA96) for which the refund contact was added. Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Tickler
A code identifying the tickler to which the refund contact is associated. Defaults to RFND. Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Refund Eligible-Student screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Refunds Screen

Purpose

The Refunds screen enables you to view a student's refundable financial aid amounts and to interactively move refundable financial aid from the Student Accounts (S/A) to the Student Refunds (S/R) prior to processing a refund check. This enables you to process a specific student's refund amount rather than use the batch refund processes. The system also displays any checks processed from refundable financial aid.

Note: A student's refundable aid must be posted/disbursed before you use this screen. Your institution must also use the Fee Collection product in the Business office.

Access

Access the Refunds screen by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Disbursed**.
3. Select **Refund**.

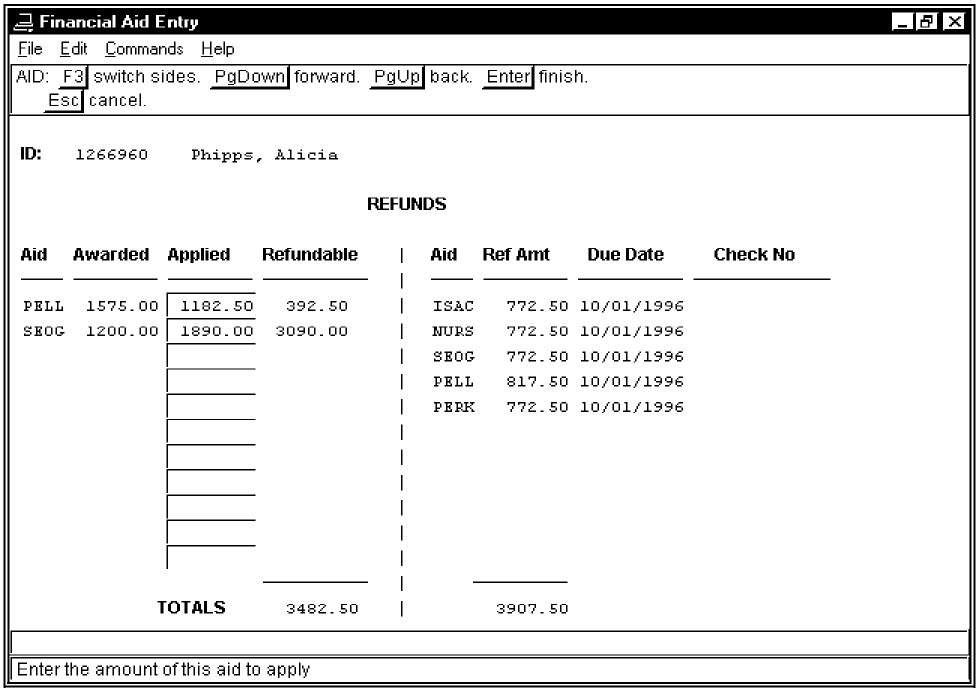
Refundable Aid Processes

You can use the Refunds screen only if your institution uses the processes on the Refundable Aid menu. If your institution's financial aid program allows excess funds to be given to students, your institution may decide to use the Refundable Aid processes instead of the voucher transaction and check production processes to produce checks for overages/credit.

Note: Specific ENABLE macros must be enabled to use this screen and the associated procedures.

Example

Following is an example of the Refunds screen.



Fields

The following list describes the fields that appear on the Refunds screen.

Note: The fields on the right side of the screen reflect the amount of refundable financial aid the student has already received or is scheduled to receive.

Aid

A code identifying the aid type (e.g., PELL) that can be refunded, is scheduled, or has been received by the student.

Applied

The dollar amount of the aid already used by the student (e.g., 1182.50). This value includes any charges (e.g., parking fees, activity fees, etc.).

Awarded

The total dollar amount of aid awarded to the student (e.g., 1575.00).

Check No

The number of the check written for the student, if applicable. The system enters this information after checks have been written.

Note: The student can have multiple refund amounts for one check; therefore, this number can be duplicated for multiple Aid codes.

Due Date

The date (mm/dd/yyyy) the refund check is due to be or was written for the student, if applicable.

ID

The system-generated number identifying the student in the database (e.g., 1266960). A display-only field, the student's name appears to the right.

Ref Amt

The dollar amount of aid being refunded to the student (772.50), if applicable. The system enters this value.

Refundable

The maximum dollar amount of the aid that can be refunded to the student (e.g., 392.50) calculated using the formula: Awarded less Applied.

Totals
The total dollar amount of all aid that can be refunded to the student (e.g., 3482.50), and the total dollar amount of all aid that is due to be or has been refunded to the student, if applicable (e.g., 3907.50).

Commands

The following lists the commands you can execute from the Refunds screen and their purposes.

Note: You can use a specific command only when it appears on the current command line.

Back
Enables you to move back one screen of data if additional screens exist.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Forward
Enables you to move forward one screen of data if additional screens exist.

Split
Accesses the Split Payment window enabling you to schedule multiple payments to be made the student on different dates for the same refund.

Switch Sides
Enables you to access some of the fields on the right side of the screen.

Refund-Contacts Screen

Purpose

The Refund-Contacts screen enables you to add a refund contact for students who should receive a refund check. This is the first step in the process to refund financial aid using contacts. This process also runs the Batch Fee Calculation for all students who receive a contact.

Note: Specific ENABLE macros must be enabled to use this screen and the associated procedures. This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

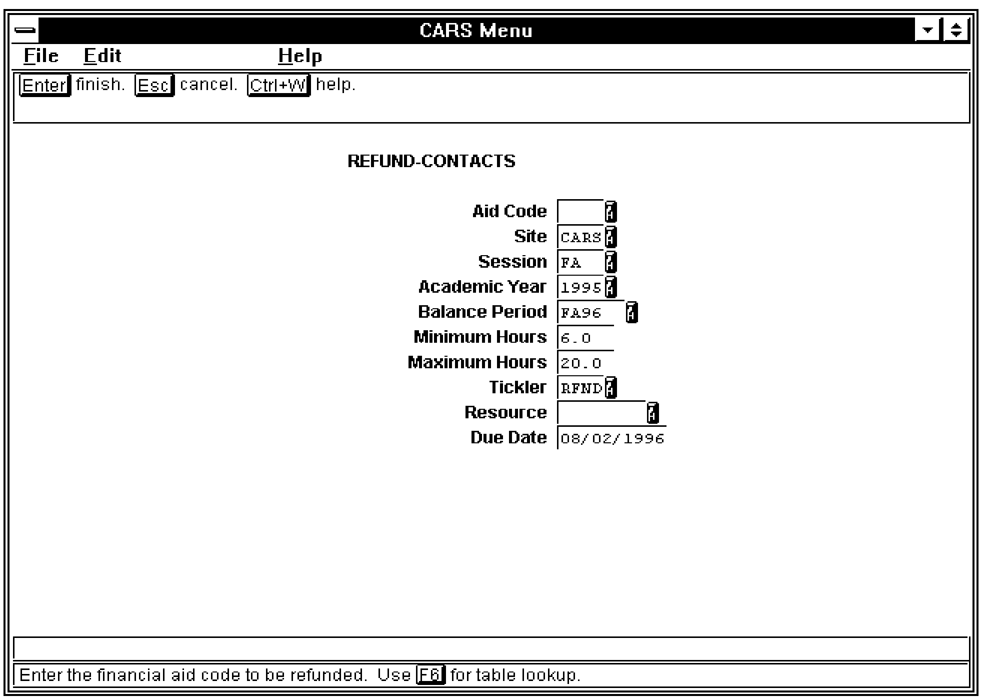
Access the Refund-Contacts screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Refund-Contacts

Note: The screen is available only if the Refund by Contact macro (ENABLE_FEAT_RFND_CTC) is enabled. If this does not appear on your menu, contact your Jenzabar coordinator.

Example

Following is an example of the Refund-Contacts screen.



Fields

The following list describes the fields that appear on the Refund-Contacts screen.

Academic Year

The calendar year (e.g., 1997) for which you are adding the refund contact. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Aid Code
A code identifying the type of aid (e.g., PELL) for which you are adding the refund contact. Use **Table Lookup** for a list of valid codes.

Balance Period
A code identifying the balance period (e.g., FA96) for which you are adding the refund contact. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Due Date
The due date (mm/dd/yyyy) for the refund contact. Defaults to the current date.

Maximum Hours
The maximum number of hours in which a student must be enrolled in order to have the refund contact added to his/her record. Defaults to 20.0.

Minimum Hours
The minimum number of hours in which a student must be enrolled in order to have the refund contact added to his/her record. Defaults to 6.0.

Resource
A code identifying the refund contact you want to add to the students' records in order for them to receive refund checks. Use **Table Lookup** for a list of valid codes.

> **Note:** You must enter the same contact and tickler for each disbursement with the same aid, site (if applicable), session, year, and refund percentage.

Session
The session in which the students who should receive the refund contact are enrolled. Defaults to FA (fall). Use **Table Lookup** for a list of valid sessions.

Site
The location where the students who should receive the refund contact attends classes. Use **Table Lookup** for a list of valid sites.

> **Note:** Site records are generally used by institutions with more than one campus.

Tickler
A code identifying the tickler to which the refund contact is associated. Defaults to RFND. Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Refund-Contacts screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Refund-ID Screen

Purpose

The Refund-ID screen enables you to refund unused financial aid for the ID number you specify or for all qualifying ID numbers. This is the first step in the process to refund financial aid using ID numbers. This process also runs the Batch Fee Calculation for the ID number you specify or for all qualifying ID numbers.

Note: Specific ENABLE macros must be enabled to use this screen and the associated procedures. This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

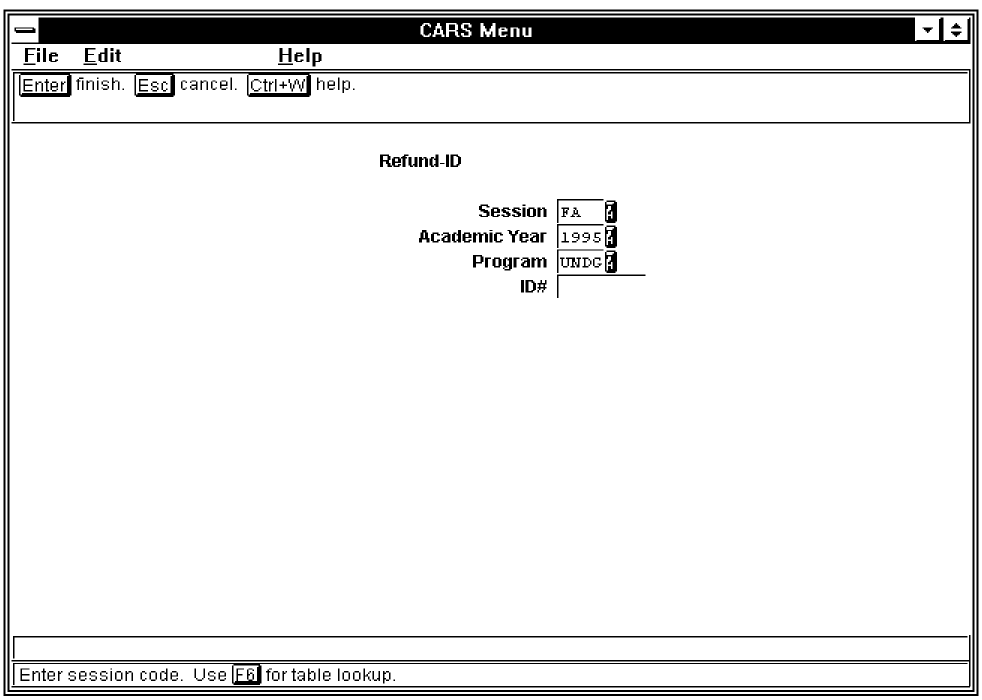
Access the Refund-ID screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Refund-ID

Note: The screen is only available if the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) is enabled. If this does not appear on your menu, contact your Jenzabar coordinator.

Example

Following is an example of the Refund-ID screen.



Fields

The following list describes the fields that appear on the Refund-ID screen.

Academic Year
The calendar year (e.g., 1997) for which you are refunding aid. Defaults to the current year. Use **Table Lookup** for a list of valid years.

ID#
The ID number of the student who is to receive the refund, or enter **0** (zero) for all qualifying students.

Program
The academic program to which the students who are to receive a refund belong. Defaults to UNDG (undergraduate). Use **Table Lookup** for a list of valid programs.

Session
The session in which the students who are to receive a refund are enrolled. Defaults to FA (fall). Use **Table Lookup** for a list of valid sessions.

Commands

The following lists the commands you can execute from the Refund-ID screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

SAP Action Process Screen

Purpose

The SAP Action Process screen enables the system to perform the following actions for each student who does not meet SAP (Satisfactory Academic Progress). This process can be run for up to four sessions.

1. Selects those students who have a SAP action contact with an expected status.
2. Performs actions on the students based on values in the Financial SAP Action table (fasapact_table).
3. Updates the contact status to completed.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Actions taken can include holding certain aid, creating letters, or notifying advisors. Creating letters and notifying advisors is simplified by creating contacts for the appropriate letter or reports, which you can produce for those students who have the contact(s).

Note: For more information about using contacts to create letters and to notify advisors, see the *Communications Management User Guide*.

Access

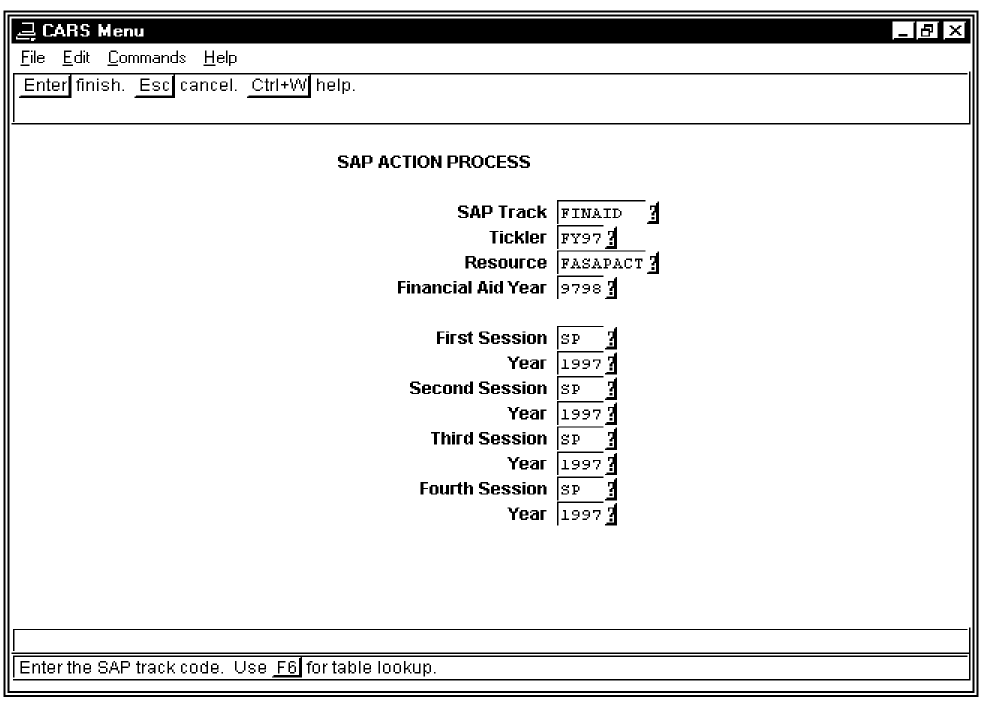
Access the SAP Action Process screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. SAP Action Process

Note: SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the SAP Action Process screen.



Fields

The following list describes the fields that appear on the SAP Action Process screen.

Financial Aid Year
The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

First Session
The first session in which aid has been awarded that you want to process. Defaults to the next session. Use **Table Lookup** for list of valid sessions.

> **Note:** If you want the process to update the aid statuses for more sessions, use the Second Session - Fourth Session fields as needed.

Fourth Session
The fourth session in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Resource
A code identifying the SAP action contact with an expected status. The system uses this contact to perform the necessary action on students requiring action. Use **Table Lookup** for a list of valid codes.

SAP Track
A code identifying the SAP track to which the SAP action contact belongs (e.g., FINAID for the Financial Aid track). Use **Table Lookup** for a list of valid codes.

Second Session
The second session in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Third Session
The third session in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Tickler
A code identifying the Tickler to which the SAP action contact is associated. Defaults to the current year's Tickler. Use **Table Lookup** for a list of valid codes.

Year (all fields)
The calendar year (yyyy) associated with the respective session that you want to process. Use **Table Lookup** for list of valid years.

Commands

The following lists the commands you can execute from the SAP Action Process screen and their purposes.

Cancel
Does not save any of the field entries you have made and exits from the current screen.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

SAP Compliance Process Screen

Purpose

The SAP Compliance Process screen produces a printed report. It enables the system to perform the following actions for students selected for SAP (Satisfactory Academic Progress) compliance:

1. Updates the SAP contact status to completed.
2. Creates a SAP action contact with an expected status for each student requiring action.
3. Updates the SAP and Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen. For more information, see the *Financial Aid Need Analysis User Guide*.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

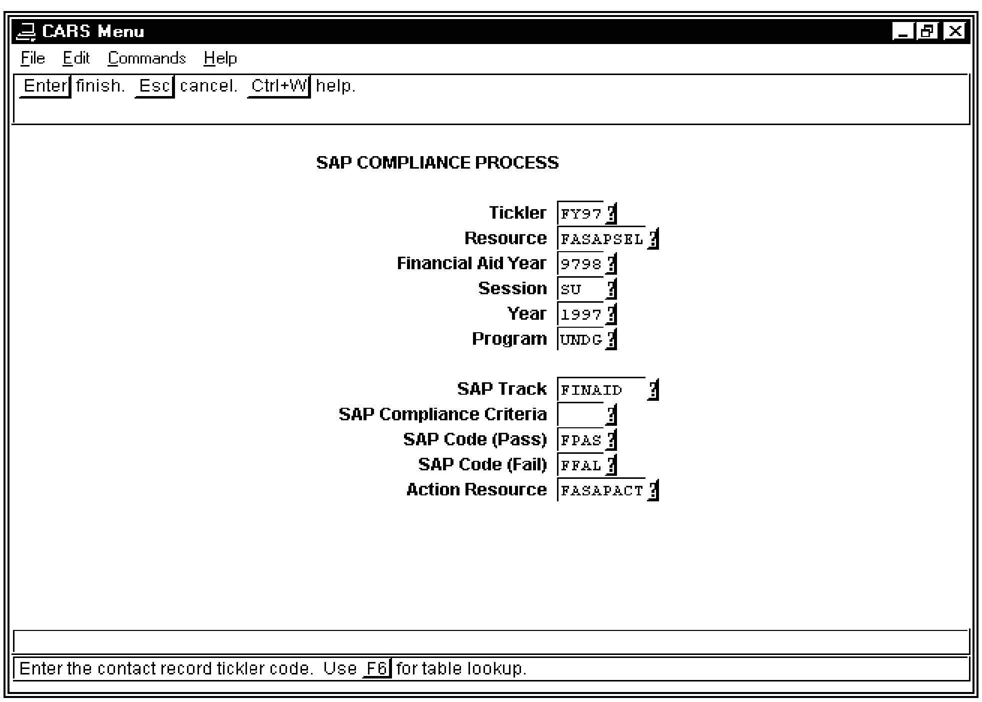
Access the SAP Compliance Process screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. SAP Compliance Process

Note: SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the SAP Compliance Process screen.



Fields

The following list describes the fields that appear on the SAP Compliance Process screen.

Action Resource
A code identifying the SAP action contact that the system adds to the contact records of those students requiring action.

Financial Aid Year
The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Program
A code identifying the program you want to process. Defaults to UNDG (undergraduate). Use **Table Lookup** for a list of valid codes.

Resource
A code identifying the SAP contact with an Expected status. The system uses this contact to run compliance criteria on students selected for SAP. Use **Table Lookup** for a list of valid codes.

> **Note:** Jenzabar recommends you use a contact similar to the name of the track of compliance you intend to use (e.g., GENERAL or SCHOLAR for the general financial aid group or the scholarship group).

SAP Code (Fail)
A code identifying the SAP status if a student fails the compliance criteria. Defaults to FISAP. The system enters this code in the SAP and/or Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen when this process is run. Use **Table Lookup** for a list of valid codes.

SAP Code (Pass)
A code identifying the SAP status if a student passes the compliance criteria. Defaults to PSAP. The system enters this code in the SAP and/or Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen when this process is run. Use **Table Lookup** for a list of valid codes.

SAP Compliance Criteria
A code identifying the criteria against which the selected students are checked. Use **Table Lookup** for a list of valid codes.

SAP Track
A code identifying the SAP track to which the SAP and SAP action contacts belong (e.g., FINAID for the Financial Aid track). Use **Table Lookup** for a list of valid codes.

Session
The session in which aid has been awarded that you want to process. Defaults to the previous session. Use **Table Lookup** for list of valid sessions.

Tickler
A code identifying the Tickler to which the SAP and SAP action contacts are associated. Defaults to the current year's Tickler. Use **Table Lookup** for a list of valid codes.

Year
The calendar year (yyyy) associated with the session that you want to process. Use **Table Lookup** for list of valid years.

Commands

The following lists the commands you can execute from the SAP Compliance Process screen and their purposes.

Cancel
Does not save any of the field entries you have made and exits from the current screen.

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

SAP Listing Screen

Purpose

The SAP Listing screen enables you to create a list of students who have the specified SAP status code. You can use this list to verify students' SAP statuses.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

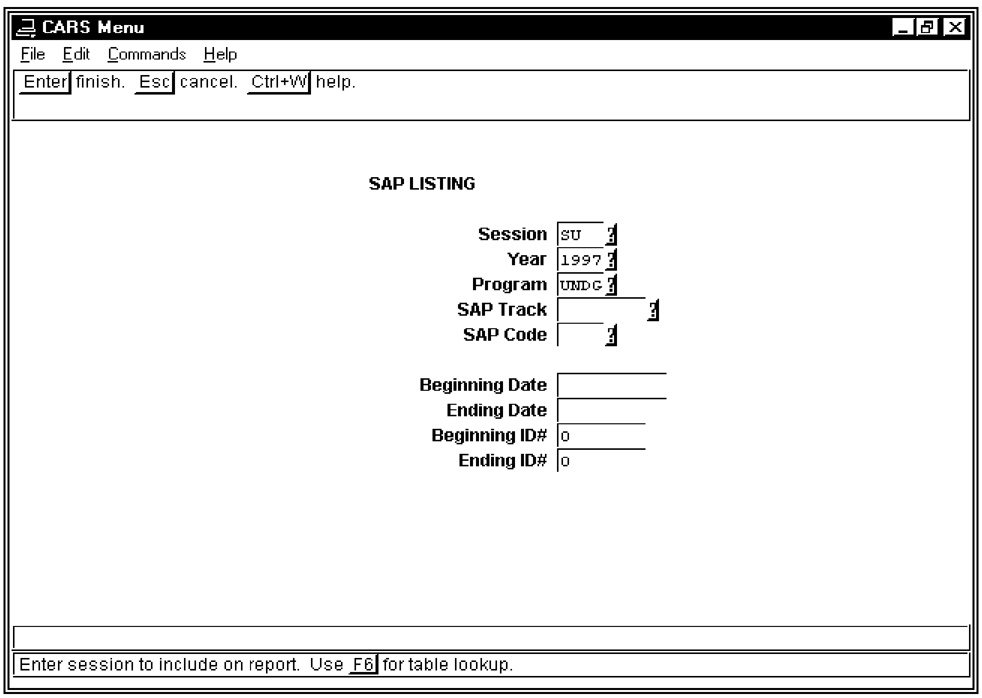
Access the SAP Listing screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. SAP Listing

Note: SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the SAP Listing screen.



Fields

The following list describes the fields that appear on the SAP Listing screen.

Beginning Date
The earliest date (mm/dd/yyyy) for which you want the indicated SAP status to be reported, or leave blank to report on all dates. Students whose SAP status changed or was added on or after this date and whose SAP status matches the status specified in the SAP code field will be included in the list.

Beginning ID#

The first (lowest) ID number for which you want the indicated SAP status reported. To report on one student only, enter the same ID number in this field and in the Ending ID# field, or enter zero (0) to report on all students.

Ending Date
The latest date (mm/dd/yyyy) for which you want the indicated SAP status to be reported, or leave blank to report on all dates. Students whose SAP status changed or was added on or before this date and whose SAP status matches the status specified in the SAP code field will be included in the list.

Ending ID#
The last (highest) ID number for which you want the indicated SAP status reported. To report on one student only, enter the same ID number in this field and in the Beginning ID# field, or enter zero (0) to report on all students.

Program
A code identifying the program (e.g., UNDG for undergraduate) that you want to process for the list, or leave blank to report on all programs.

SAP Code
A code identifying the SAP status for which you want to search (e.g., FAIL for Failed SAP), or leave blank to search for all statuses. Use **Table Lookup** for a list of valid codes.

Note: If you run the report after the SAP Compliance process to determine which students passed or failed the criteria you passed, make sure you use the same pass/fail codes you used in the Compliance process.

SAP Track
A code identifying the SAP track for which you want to search (e.g., FINAID for the Financial Aid track), or leave blank to report on all tracks. Use **Table Lookup** for a list of valid codes.

Session
The session that you want to process for the list. Defaults to the previous session. Use **Table Lookup** for list of valid sessions.

Year
The calendar year (yyyy) associated with the specified session that you want to process. Defaults to the current year. Use **Table Lookup** for list of valid years.

Commands

The following lists the commands you can execute from the SAP Listing screen and their purposes.

Cancel
Does not save any of the field entries you have made and exits from the current screen.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Select Award Notices Screen

Purpose

The Select Award Notices screen enables the system to select and format award notification forms for batch printing. You can include a maximum of four sessions on the same form.

> **Note:** You must run this process before you run the Print Award Notices process. This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

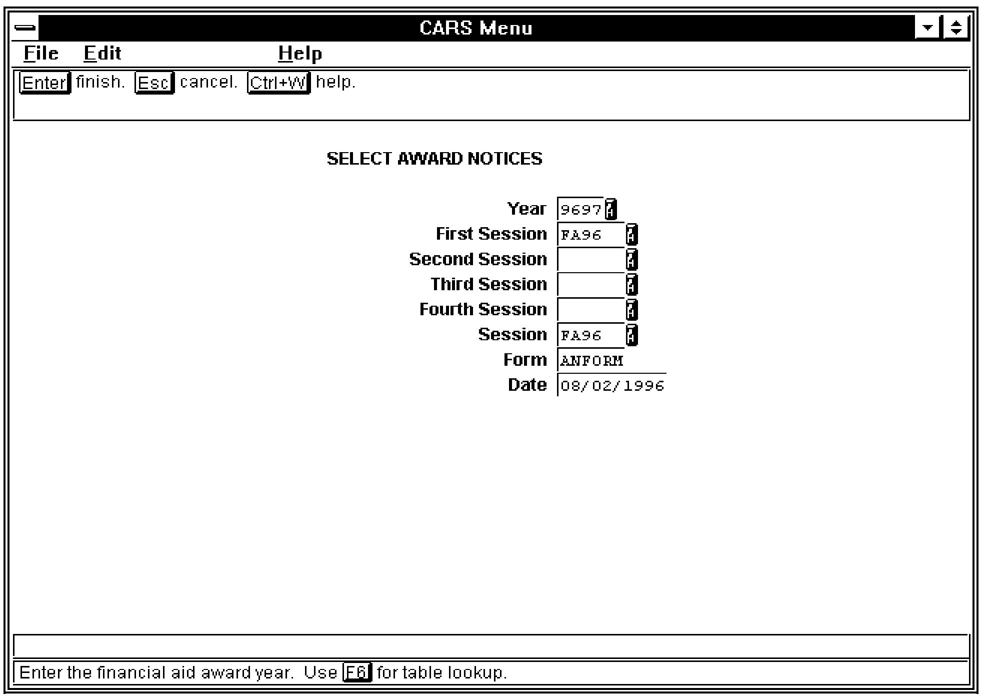
Access

Access the Select Award Notices screen by selecting the following, beginning at the Financial Aid Main: Student Processing menu:

1. Award/Cover Letters
2. Award Notices

Example

Following is an example of the Select Award Notices screen.



Fields

The following list describes the fields that appear on the Select Award Notices screen.

> **Note:** The sessions are printed on the award notification form in the order that you enter them.

Date

The date (mm/dd/yyyy) to be printed on the award notification form as the date the student must return the form to your Financial Aid office. Defaults to the current date.

First Session

The first award session (e.g., FA96) to be included on the award notification form. Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Form
A code identifying the award notification form (e.g., ANFORM) to use.

Fourth Session
The fourth award session to be included on the award notification form. Use **Table Lookup** for a list of valid sessions, or leave blank.

Second Session
The second award session to be included on the award notification form. Use **Table Lookup** for a list of valid sessions, or leave blank.

Session
The current session (e.g., FA96). Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Third Session
The third award session to be included on the award notification form. Use **Table Lookup** for a list of valid sessions, or leave blank.

Year
The financial aid award year in which aid has been awarded that you want to consider for the process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Create Cover Letters screen and their purposes.

Cancel
Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Help
Displays help information about the associated screen or process.

Select FA SAP IDs Screen

Purpose

The Select FA SAP IDs screen enables the system to select the students whom you want to process for SAP (Satisfactory Academic Progress). When you run this process, the system selects those students who have been awarded aid and who require checking for pass/fail academic progress requirements. The sessions passed identify all those the system will check for awarded aid that is used for SAP processing. The process creates a SAP contact with an expected status for all selected students.

Note: This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

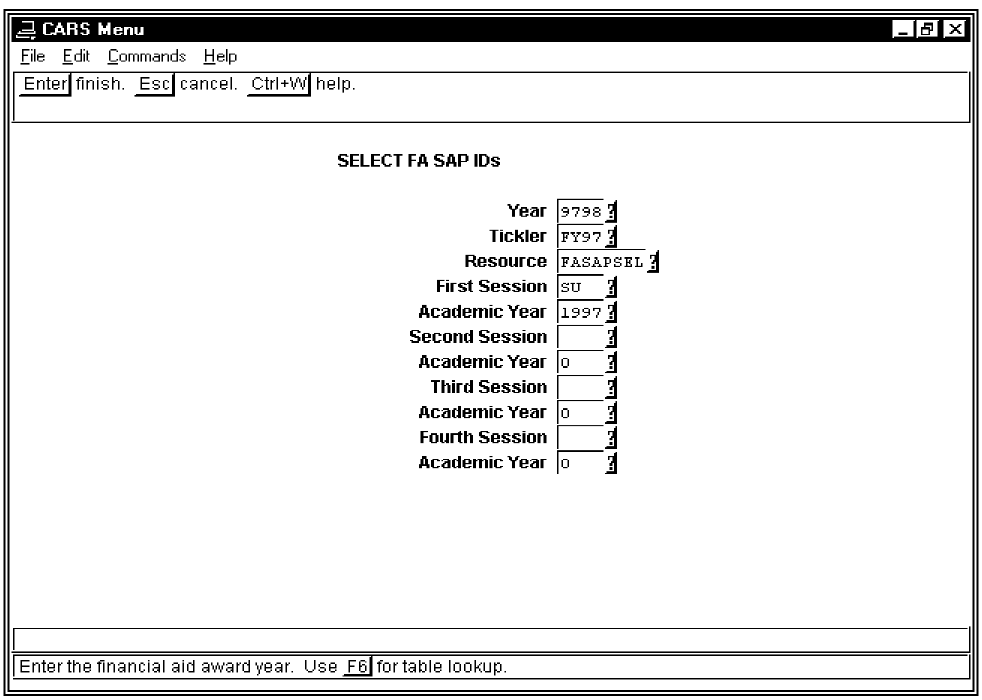
Access the Select FA SAP IDs screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. FA SAP IDs

Note: SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the Select FA SAP IDs screen.



Fields

The following list describes the fields that appear on the Select FA SAP IDs screen.

Academic Year `(all fields)`

The `calendar year (yyyy) associated` with the respective session that you want to process. Use **Table Lookup** for a list of valid years.

First Session

The first session for the year in which aid has been awarded that you want to process. Defaults to the previous session. Use **Table Lookup** for list of valid sessions.

Fourth Session

The fourth session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Resource

A code identifying the SAP contact the system will add to the selected students' contact records.

Second Session

The second session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Third Session

The third session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Tickler

A code identifying the Tickler to which the SAP contact is associated. Defaults to the current year's Tickler. Use **Table Lookup** for a list of valid codes.

Year

The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Select FA SAP IDs screen and their purposes.

Cancel

Does not save any of the field entries you have made and exits from the current screen.

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

Split Payment Window

Purpose

The Split Payment window enables you to schedule multiple refund payments to be made to a student on different dates for the same refund.

Access

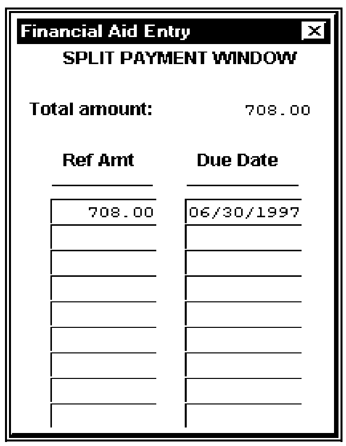
Access the Split Payment window from the Refunds screen by selecting the following, beginning at the Financial Aid Entry screen:

Note: For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student's ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Disbursed.
3. Refund.
4. Switch Sides.
5. Split.

Example

Following is an example of the Split Payment window.



Fields

The following list describes the fields that appear on the Split Payment window.

Due Date
The date (mm/dd/yyyy) the payment is scheduled to be made. Defaults to the current date.

Ref Amt
The dollar amount of the payment to be made to the student (e.g., 708.00). Defaults to a value based on the total amount of aid being refunded and the amount of each payment to be made.

Total Amount
The total amount of aid being refunded to the student (e.g., 708.00).

Commands

The following lists the commands you can execute from this screen and their purposes.

Add-Payment
Enables you to add another payment to be scheduled.

Back
Enables you to move back one screen of data if additional screens exist.

Cancel
Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Forward
Enables you to move forward one screen of data if additional screens exist.

Support Services Window

Purpose

The Support Services window enables you to view, add, update, and/or delete a student's support services information. Support services can include orientation, counseling, and tutoring.

Access

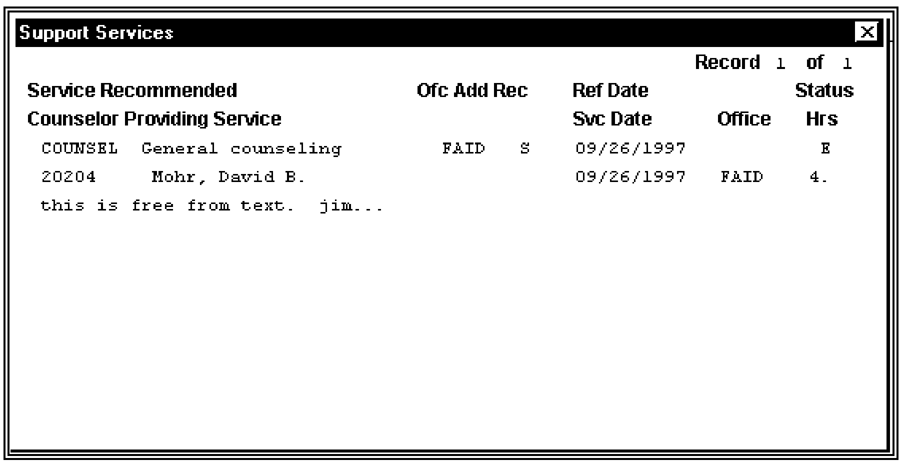
Access the Support Services window by selecting the following, beginning at the Financial Aid Entry screen:

`Note:` For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Scroll Screens.
3. Svc-Info.

Example

Following is an example of the Support Services window.



Fields

The following list describes the fields that appear on the Support Services window.

(Comment)
This is an unlabeled field located on the third line, below the Counselor Providing Service field. Any comment associated with the support service being recommended or requested.

Counselor Providing Service
The ID number (e.g., 20204) of the individual providing the service. Press <F6> to perform a query. The individual's name appears to the right of the ID number.

Note: This value is displayed below the value for Service Recommended.

Hrs
The number of hours spent providing the service (e.g., 4).

Note: This value is displayed below the value for Status.

Ofc Add

A code identifying the office making the service referral (e.g., FAID for the Financial Aid office). Use **Table Lookup** for a list of valid values.

Office

A code identifying the office providing the support service (e.g., FAID for the Financial Aid office). Use **Table Lookup** for a list of valid values.

Rec

A code identifying the person(s) who recommended the support service. Valid values are:
- B (Both)
- E (Either)
- S (Student)
- T (Staff)

Ref Date

The date the Support Services record was added (e.g., 01/15/1996). This is a display-only field. Defaults to the current date if the record is being added.

Note: This value is displayed directly below the Svc Date field name.

Service Recommended

A code identifying the support (e.g., COUNSEL). Use **Table Lookup** for a list of valid codes. The description appears to the right of the code.

Note: This value is displayed directly below the Counselor Providing Service field name.

Status

A code identifying the status of the service. Valid codes are:
- C (Completed)
- E (Expected)
- R (Refused)

Note: This value is displayed directly below the Hrs field name.

Svc Date

The date (e.g., 1/15/1996) the support service was provided.

Note: This value is displayed below the value for Ref Date.

Commands

The following lists the commands you can execute from the screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Add

Creates a blank line enabling you to add another record.

Cancel

Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close

Enables you to exit from the current screen or window.

Delete

Enables you to remove a record.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Next
Enables you to move forward one screen of data if additional screens exist.

Previous
Enables you to move back one screen of data if additional screens exist.

Update
Enables you to change an existing record.

Transfer Monies Window

Purpose

The Transfer Monies window enables you to enter the date the refund check is due to be written for a student and change the amount of the aid to be refunded, if necessary.

Access

Access the Transfer Monies window by selecting the following, beginning at the Financial Aid Entry screen:

`Note:` For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

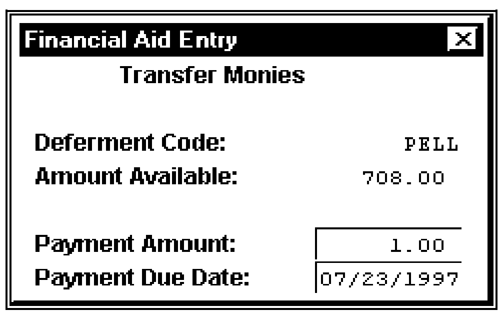
1. Enter the desired student's ID or social security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Disbursed**.
3. Select **Refund**.
4. Enter an amount in the Applied field.

   `Note:` The amount you enter must be more than the amount that was originally applied and less than the total amount awarded.

5. Select **Finish**.

Example

Following is an example of the Transfer Monies window.



Fields

The following list describes the fields that appear on the Transfer Monies window.

Amount Available
The maximum dollar amount of the aid that can be refunded to the student (e.g., 708.00).

Deferment Code
A code identifying the aid type (e.g., PELL) that is being refunded.

Payment Amount
The total dollar amount of the aid being refunded to the student (e.g., 1.00). Defaults to the amount by which you increased the amount in the Applied field on the Refunds screen.

Payment Due Date

The date (mm/dd/yyyy) the refund check is due to be written for the student. Defaults to the current date.

Commands

The following lists the commands you can execute from this screen and their purposes.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Update Total Income Screen

Purpose

The Update Total Income screen enables you to update students' total income if you received an error message after you created FISAP records. You can update the total income for one student, specific students, or for a range by specifying the beginning ID number.

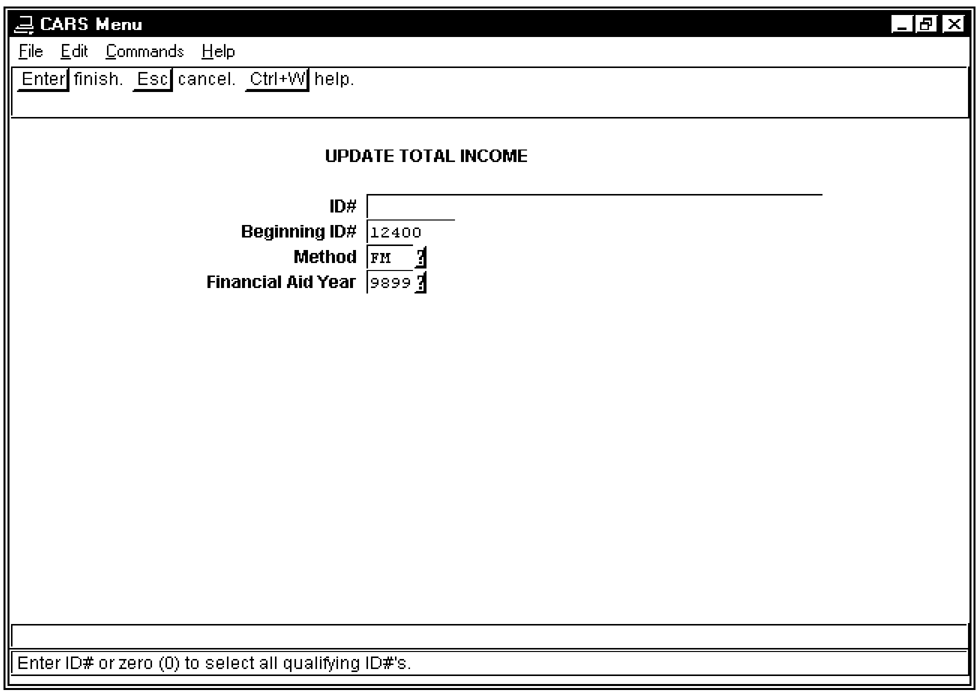
Access

Access the Update Total Income screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Reports
2. FISAP
3. Update Total Income

Example

Following is an example of the Update Total Income screen.



Fields

The following list describes the fields that appear on the Update Total Income screen.

Beginning ID#
The first student's ID number in the range you want to process, or enter **0** (zero) to select all qualifying IDs. Press **<F6>** to perform a query.

Financial Aid Year
The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

ID#

The ID number(s) of the student(s) whose total income(s) you want to update.

Method

A code identifying the need analysis methodology that you want to process (e.g., FM). Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Update Total Income screen and their purposes.

Cancel

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish

Saves your field entries when you have completed your data entry or selection and want to continue.

Help

Displays help information about the associated screen or process.

SECTION 3 - MANAGING STUDENTS' FINANCIAL AID INFORMATION

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Display a student's financial aid and statuses
- Select a need analysis methodology to display the student's desired budget, Expected Family Contribution (EFC), and need amounts
- Add, update, and/or delete a student's financial aid award(s) and status(es)
- Reverse a student's posted financial aid award(s)
- Add, update, and/or delete a student's cumulative financial aid award history.
- Run the audit process after making any changes

Before You Begin

Before you begin to use the following procedures for managing financial aid information, remember:

- An ID record for the student must already exist on the system.
- The student does not have to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in this guide when you complete the fields on the screens.

Previous and Transfer Sessions

Financial Aid Entry allows you to enter a student's historical financial aid information from previous and transfer sessions. Following is the description of these two session types.

Previous

The student was awarded financial aid in a session prior to the implementation of CX. The Historical code for a previous session is PREV.

Transfer

The student was awarded financial aid while attending another institution. The Historical code for a transfer session is XFR.

Historical Information on Transcripts

Financial Aid Entry accumulates a student's historical awards for previous sessions (PREV) in the totals printed in Section D of the financial aid transcript. The transcript does not include amounts for transfer sessions (XFR) because it reflects only those awards made to the student at the current institution.

The Process

The following list shows the general phases that take place before, during, and after managing students' financial aid information.

1. Access Financial Aid Entry and enter appropriate parameters for processing financial aid information. If entering award history, select **Cumulative History**.
2. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
3. Select **Update**.
4. Complete and save all field entries.

5. Run the audit process to check Aid records (aid_rec) and Student Financial Aid records (stufa_rec), verify aid fund balances, and update any error conditions found after making any changes.

Commands to Use

Select the following commands to manage financial aid information for a student:

- **Cumulative History -** If you are managing cumulative history information.

  `Note:` You execute this command from the Financial Aid Entry Program Parameters screen.

- **Update -** To add, update, and/or delete financial aid award information or cumulative history information for a student. This command is an instruction from you to the system that does the following:
  - Notifies the system to begin the Update mode.
  - Changes the command line by adding **Add** and **Delete** commands allowing you to access other commands such as **Compliance**, **Funds**, **Toggle**, and **Help.**

Displaying a Student’s Award Information

Commands Affecting Displayed Information

The Financial Aid Entry screen contains commands that adjust the display and/or calculation of a student’s financial aid information. Review the usage of the commands below before you add, update, and/or delete financial aid information.

Toggle

This command allows you to display a student's records with either Amount Status codes or Packaging Method Status codes. When you select the **Toggle** command, the following occurs:

- If the Am field is currently displayed, the system replaces the Am field with the Pk field.
- If the Pk field is currently displayed, the system replaces the Pk field with the Am field.

The Am field displays the amount status for the specific aid code. The Pk field displays the packaging method status for the specific aid code. For more information on valid statuses for each field, see the section *Using the Financial Aid Screens* in this guide, or select the **Help** command on the Financial Aid Entry screen.

Note: The packaging method status is available only if the interactive Financial Aid Packaging product is available.

Method

This command allows you to access the Financial Aid Methodology Selection window that lets you select the need analysis methodology for the student. When you select a need analysis methodology (e.g., FM), it appears in the (Financial Aid Need Analysis Form Record/Method) field on the Financial Aid Entry screen, which displays information about the student’s budget, need, and unmet amount.

Note: For more information about selecting a methodology, see the *Financial Aid Methodology Selection Window* in this guide.

Adding Financial Aid Information

Introduction

This section provides two procedures for adding financial aid information: a standard procedure and a procedure if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

How to Add Financial Aid Information

Follow these steps to add financial aid information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student’s ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.
4. The system loads the student’s financial aid information and verifies compliance.

   Note:
   - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution’s fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message “Program Enrollment record not found for this student” may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Does the student have existing financial aid entries?
   - If <u>yes</u>, the cursor appears in the Total field. Select **Add-Line**, and a blank line appears with the cursor in the Code field.
   - If <u>no</u>, the cursor appears in the Code field.
8. Enter the financial aid code. The cursor moves to the Total field.
9. Enter the total amount of the aid, and press **<Tab>**. The system calculates the amount to be awarded for each session and enters this information in the remaining fields, and enters statuses in the Ad and Am fields.
10. Do you want to enter additional financial aid information?
    - If <u>yes</u>, select **Add-Line**. A blank line appears with the cursor in the Code field. Go to step 7.
    - If <u>no</u>, select **Finish**. Go to step 10.
11. Do you want to add financial aid information for another student?
    - If <u>yes</u>, select **Query** and go to step 3.
    - If <u>no</u>, select **Exit**. The message “Are you sure you want to exit?” appears.
12. Select **Yes**. The Financial Aid: Student Processing menu reappears.

How to Add Financial Aid Information Using Automatic Recalculation

Follow these steps to add financial aid information when the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

   Note:
   - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Does the student have existing financial aid entries?
   - If yes, the cursor appears in the Ad field. Select **Add-Line**, and a blank line appears with the cursor in the Code field.
   - If no, the cursor appears in the Code field.
8. Enter the financial aid code. The Aid by Enrollment Status List window appears.
9. Enter the total amount of the aid in the Total Amount field, and select **Finish**. The message "Update all enrollment amounts?" appears.
10. Do you want the system to automatically update enrollment amounts?
    - If yes, select **Yes**. The system calculates the aid to be awarded for each session based on the ratios you entered in the Proportion fields on the Financial Aid Entry Program Parameters screen, and the amounts for each enrollment status based on the values in the Aid Detail table (aiddtl_table).

      Note: If the system does not find a value in this table, you may get warning messages informing you it will use the full award for each enrollment status. Select **OK** for each message. The system equally distributes the aid among all sessions.
    - If no, select **No**. The cursor appears in the first Enrollment Status field. Enter the amount for each session for the appropriate enrollment status. Press **<Tab>** to move to each field, if necessary.
11. Select **Finish**. The Financial Aid Entry screen reappears displaying the new financial aid information.
12. Do you want to add additional financial aid information?
    - If yes, go to step 6.

- If no, select **Finish**.

13. Do you want to add financial aid information for another student?
    - If yes, select **Query** and go to step 3
    - If no, select **Exit**. The message “Are you sure you want to exit?” appears

14. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Updating Financial Aid Information

Introduction

This section provides two procedures for updating financial aid information: a standard procedure and a procedure if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

How to Update Financial Aid Information

Follow these steps to update financial aid information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

   Note:
   - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row you want to update?
   - If yes, go to step 7.
   - If no, use the **<Arrow>** keys to move the cursor to the correct row.
8. Update the necessary information in the appropriate fields (e.g., the award amount). Press **<Tab>** to move to each field, if necessary. The system recalculates and updates the affected fields.

   Note: You cannot delete the aid code. If you want to change the aid code, you must delete it first, then add the new financial aid information. For these procedures, see *Deleting Financial Aid Information* and *Adding Financial Aid Information* in this section.
9. Do you want to update additional financial aid information?
   - If yes, go to step 6.
   - If no, select **Finish**.
10. Do you want to update financial aid information for another student?
    - If yes, select **Query** and go to step 3.
    - If no, select **Exit**. The message "Are you sure you want to exit?" appears.

11. Select **Yes**. The Financial Aid: Student Processing menu reappears.

How to Update Financial Aid Information Using Automatic Recalculation

Follow these steps to update financial aid information when the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

   Note:
   - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row you want to update?
   - If <u>yes</u>, go to step 7.
   - If <u>no</u>, use the **<Arrow>** keys to move the cursor to the correct row.
8. Select **Detail**. The Aid by Enrollment Status List window appears.
9. Update the amount of the award in the Total Amount field, and select **Finish**. The message "Update all enrollment amounts?" appears.
10. Do you want the system to automatically update enrollment amounts?
    - If <u>yes</u>, select **Yes**. The system calculates the aid to be awarded for each session based on the ratios you entered in the Proportion fields on the Financial Aid Entry Program Parameters screen, and the amounts for each enrollment status based on the values in the Aid Detail table (aiddtl_table).

      Note: If the system does not find a value in this table, you may get warning messages informing you it will use the full award for each enrollment status. Select **OK** for each message. The system equally distributes the aid among all sessions.
    - If <u>no</u>, select **No**. The cursor appears in the first Enrollment Status field. Enter the amount for each session for the appropriate enrollment status. Press **<Tab>** to move to each field, if necessary.
11. Select **Finish**. The Financial Aid Entry screen reappears displaying the new financial aid information.
12. Do you want to update additional financial aid information?

- If <u>yes</u>, go to step 6.
- If <u>no</u>, select **Finish**.

13. Do you want to update financial aid information for another student?
    - If <u>yes</u>, select **Query** and go to step 3.
    - If <u>no</u>, select **Exit**. The message “Are you sure you want to exit?” appears.
14. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Processing Financial Aid Following an Automatic Recalculation Error

Purpose

The Financial Aid office of your institution must inform the Registration office as to the time period when the Automatic Recalculation processes will occur as defined in the Financial Aid Session table (fasess_table). However, situations may arise in the Registration office when Automatic Recalculation does not occur, such as if a student's records are locked or as a result of a billing error.

In these situations, the system performs the following actions:

1. Sends two messages to the user's computer in the Registration office. The first message indicates that the system is attempting to run Automatic Recalculation. The second message informs the user the system could not do Automatic Recalculation.
2. Sends one or more e-mail messages to the user in the Registration office and other individuals as defined in the Mail Group macro (MPKG_MAIL_GROUP). Other recipients can include the Financial Aid office and the Jenzabar coordinator. The message(s) notifies the recipients that an error has occurred with Automatic Recalculation and why.
3. Adds an Automatic Recalculation error contact (RCALERR) to the student's Contact record with an expected status. If necessary, you can obtain a list of the students who had this contact added to their records from the Financial Aid office. After the problem has been resolved or the records unlocked, either office (Registration or Financial Aid) can use this list to identify those students whose records need to be accessed in order to cause Automatic Recalculation to occur.

   Note: If the process to run Automatic Recalculation following an error is done on a date after the Automatic Recalculation period, the Registration office must run the process. The Registration office sets the Effective Date field on the Registration Initialization screen to a date within the automatic recalculation period and forces Automatic Recalculation to take place. For more information, see the *Registration User Guide*.

How to Create the Contact Status Report by Contact Resource

Follow these steps to create a list of the students who had the Automatic Recalculation error contact (RCALERR) added to their records.

1. From the Document Tracking: Reports menu, select the menu option Contact Range.
2. Enter the name of the Automatic Recalculation error contact (i.e., RCALERR) in the First and Second fields, and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: Ensure E appears in the Status field to include only new students who had the contact added to their records.

3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Document Tracking: Reports menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for those students who have the contact you specified with an expected status and creates the report. After the system completes the process, it sends you e-mail informing you if it completed

successfully. If you sent the report to a file, it includes the name of that file in your home directory.

How to Process Financial Aid Following an Error in Automatic Recalculation

After you create the list of students who had the Automatic Recalculation error contact added to their records, the Financial Aid office should follow these steps to process financial aid following an error in Automatic Recalculation.

1. From the menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Enter the student's ID number from the Contact Status Report by Contact Resource. The system loads the student's financial aid information and verifies compliance.

   Note:
   - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
4. Select **Update**, then select **Finish**. The system processes the student's financial aid using Automatic Recalculation and updates the status of the Automatic Recalculation error contact (RCALERR) to completed.
5. Do you want to query on another student?
   - If <u>yes</u>, select **Query** and go to step 3.
   - If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.
6. Select **Yes**. The menu reappears.

Deleting Financial Aid Information

How to Delete Financial Aid Information

Follow these steps to delete financial aid information.

Note: You cannot delete aid that has been disbursed/posted; that is, an award with an amount status (in the Am field) of AD (Actual award totally disbursed) or AP (Actual award partially disbursed). You can, however, reverse a portion of the amount or the total amount of the award in the Student Accounts (S/A). For this procedure, see *Reversing Posted Financial Aid Information* in this section.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

   Note:
   - You may get a warning message if the student has been awarded aid in other sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row you want to delete?
   - If <u>yes</u>, go to step 7.
   - If <u>no</u>, use the **<Arrow>** keys to move the cursor to the correct row.
8. Select **Del-Line**. The message "Delete '*code*' award? (Y/N)" appears.
9. Select **Yes**. The message "*Code* has been deleted" appears in the comment line.

   Note: If you select **No**, no action occurs.
10. Do you want to delete additional financial aid information?
    - If <u>yes</u>, go to step 6.
    - If <u>no</u>, select **Finish**.
11. Do you want to delete financial aid information for another student?
    - If <u>yes</u>, select **Query** and go to step 3.
    - If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.
12. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Reversing Posted Financial Aid Information

Introduction

You cannot delete financial aid information that has been disbursed/posted. However, you can reverse a portion of the amount or the total amount of the award in the Student Accounts (S/A). This section provides two procedures for reversing posted financial aid information: a standard procedure and a procedure if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

How to Reverse Posted Financial Aid Information

Follow these steps to reverse posted financial aid information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

   Note: You may get a warning message if the student has been awarded aid in other sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row you want to reverse (i.e., the status of the aid amount in the Am field is AD)?
   - If yes, go to step 7.
   - If no, use the **<Arrow>** keys to move the cursor to the correct row.

   Note: To maintain the student's award information for historical purposes, Jenzabar recommends that you use the Comments screen and enter a note including the amount that was reversed and why. For more information about using comments, see the section *Using Financial Aid Comments* in this guide.
8. Do you want to reverse the total award?
   - If yes, enter **0** in the Total field, then press **<Tab>**. The system updates the amount awarded for each session to 0 and updates the aid amount status in the Am field for the posted aid from AD to AP.

     Note: If you do not want to reverse the total award, you can reverse a portion of it by entering the new amount in the Total field. The system recalculates the amount for each session and displays these values. It also updates the aid amount status in the Am field for the posted aid from AD to AP.
   - If no, press **<Tab>** to move the cursor to the session field displaying the amount awarded you want to reverse (e.g., FA96). Enter **0**, then press **<Tab>**. The system updates the aid amount status in the Am field for the posted aid from AD to AP. The

system also updates the Total field to reflect the amount of the award(s) remaining in the other session(s).

Note: If you do not want to reverse the total award for the session, you can reverse a portion of it by entering the new amount in the session field. The system updates the aid amount status in the Am field for the posted aid from AD to AP. The system also updates the Total field to reflect the amount of the award(s) remaining in the other session(s).

9. Do you want to reverse additional posted financial aid information for the student?
   - If yes, go to step 6.
   - If no, select **Finish**.
10. Do you want to reverse financial aid information for another student?
    - If yes, select **Query** and go to step 3.
    - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
11. Select **Yes**. The Financial Aid: Student Processing menu reappears.

The student’s financial aid must be posted again in order to reverse the amount of the award you changed in the Student Accounts (S/A). For more information about posting financial aid by running the Post Financial Aid process, see the *Student Billing User Guide*. When the Post Financial Aid process is run, the system debits the Student Accounts (S/A) for the amount of the reversed financial aid and updates the status of the aid amount in the Am field to AD.

How to Reverse Posted Financial Aid Information Using Automatic Recalculation

Follow these steps to reverse posted financial aid information when the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student’s ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.
4. The system loads the student’s financial aid information and verifies compliance.

   Note: You may get a warning message if the student has been awarded aid in other sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution’s fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row and in the correct session you want to reverse (i.e., the status of the aid amount in the Am field is AD)?
   - If yes, go to step 7.
   - If no, use the **<Arrow>** keys to move the cursor to the correct row and session.

   Note: To maintain the student’s award information for historical purposes, Jenzabar recommends that you use the Comments screen and enter a note including the amount that was reversed and why. For more information about using comments, see the section *Using Financial Aid Comments* in this guide.

8. Select **Detail**. The Aid by Enrollment Status List window appears.
9. Enter **0** in the Total Amount field, and select **Finish**. The message "Update all enrollment amounts?" appears.

   Note: You can reverse a portion of the total award by entering the new amount in the Total Amount field.

10. Select **Yes**. The system zeros out the amount for each enrollment status.

    Note: If you reversed a portion of the award, the system recalculates the amount for each enrollment status.

11. Select **Finish**. The Financial Aid Entry screen reappears displaying the new financial aid information: The system updates the aid amount status in the Am field for the posted aid from AD to AP, and it updates the Total field to reflect the amount of the award(s) remaining in the other session(s).
12. Do you want to reverse additional posted financial aid information for the student?
    - If yes, go to step 6.
    - If no, select **Finish**.
13. Do you want to reverse financial aid information for another student?
    - If yes, select **Query** and go to step 3.
    - If no, select **Exit**. The message "Are you sure you want to exit?" appears.
14. Select **Yes**. The Financial Aid: Student Processing menu reappears.

The student's financial aid must be posted again in order to reverse the amount of the award you changed in the Student Accounts (S/A). For more information about posting financial aid by running the Post Financial Aid process, see the *Student Billing User Guide*. When the Post Financial Aid process is run, the system debits the Student Accounts (S/A) for the amount of the reversed financial aid and updates the status of the aid amount in the Am field to AD.

Adding Cumulative Award History Information

How to Add Cumulative Award History

Follow these steps to add cumulative award history information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.

   Note: If you are currently in Financial Aid Entry, select the **Initialize** command to access the Financial Aid Entry Program Parameters screen.

2. Select **Cumulative History**. The system enters historical codes in the associated fields:
   - Award Session(s) = PREV XFR
   - Award Year = HIST
   - Default Program = HIST
   - Session = PREV XFR

   Note: These fields become display-only to ensure you do not enter current awards as historical awards. The system ignores entries in the Current Session, Proportion, and Extra fields.

3. Select **Finish**. The Financial Aid Entry screen appears in Query mode.

4. Do you know the student's ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.

   Note:
   - You may get a warning message if the student has been awarded aid in other HIST sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.

5. Select **Update**.

6. Select **Finish** to accept the default code in the Pkg field.

7. Does the student have existing financial aid entries?
   - If yes, the cursor appears in the PREV field. Select **Add-Line**, and a blank line appears with the cursor in the Code field.
   - If no, the cursor appears in the Code field. Go to step 8.

8. Enter the financial aid code (e.g., PELL). The cursor advances to the PREV field.

9. Enter the cumulative dollar amount of the aid awarded in the following fields. Press **<Tab>** to move to each field, if necessary.
   - PREV (For aid awarded to the student in a session prior to the implementation of CX).
   - XFR (For aid awarded to the student while attending another institution).

10. The system enters the total of both fields in the Total field and recalculates the amount in the (Grand Total) and (Session Total) fields.

    Note: The system displays and ignores default values in the Ad and Am fields.

11. Do you want to enter cumulative award history for another financial code?
    - If yes, go to step 7.
    - If no, select **Finish**.
12. Do you want to enter cumulative award history for another student?
    - If yes, select **Query** and go to step 4.
    - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
13. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Updating Cumulative Award History Information

How to Update Cumulative Award History Information

Follow these steps to update cumulative award history information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.

   Note: If you are currently in Financial Aid Entry, select the **Initialize** command to access the Financial Aid Entry Program Parameters screen.

2. Select **Cumulative History**. The system enters historical codes in the associated fields:
   - Award Session(s) = PREV XFR
   - Award Year = HIST
   - Default Program = HIST
   - Session = PREV XFR

   Note: These fields become display-only to ensure you do not enter current awards as historical awards. The system ignores entries in the Current Session, Proportion, and Extra fields.

3. Select **Finish**. The Financial Aid Entry screen appears in Query mode.

4. Do you know the student’s ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.

   Note:
   - You may get a warning message if the student has been awarded aid in other HIST sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution’s fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message “Program Enrollment record not found for this student” may also appear in the comment line if the student is not yet enrolled. This is a warning message only.

5. Select **Update**.

6. Select **Finish** to accept the default code in the Pkg field.

7. Is the cursor on the row you want to update?
   - If <u>yes</u>, go to step 8.
   - If <u>no</u>, press the **<Arrow>** keys to move the cursor to the correct row.

8. Update the necessary fields (i.e., the PREV and/or XFER fields). Press **<Tab>** to move to each field, if necessary. The system recalculates the amount in the Total, (Grand Total) and (Session Total) fields.

9. Do you want to update cumulative award history for another financial code?
   - If <u>yes</u>, go to step 7.
   - If <u>no</u>, select **Finish**.

10. Do you want to update cumulative award history for another student?
    - If <u>yes</u>, select **Query** and go to step 4.
    - If <u>no</u>, select **Exit**. The message “Are you sure you want to exit?” appears.

11. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Deleting Cumulative Award History Information

How to Delete Cumulative Award History Information

Follow these steps to delete cumulative award history information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.

   Note: If you are currently in Financial Aid Entry, select the **Initialize** command to access the Financial Aid Entry Program Parameters screen.

2. Select **Cumulative History**. The system enters historical codes in the associated fields:
   - Award Session(s) = PREV XFR
   - Award Year = HIST
   - Default Program = HIST
   - Session = PREV XFR

   Note: These fields become display-only to ensure you do not enter current awards as historical awards. The system ignores entries in the Current Session, Proportion, and Extra fields.

3. Select **Finish**. The Financial Aid Entry screen appears in Query mode.

4. Do you know the student's ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.

   Note:
   - You may get a warning message if the student has been awarded aid in other HIST sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
   - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.

5. Select **Update**.

6. Select **Finish** to accept the default code in the Pkg field.

7. Is the cursor on the row you want to delete?
   - If yes, go to step 8.
   - If no, press the **<Arrow>** keys to move the cursor to the correct row.

8. Select **Del-Line**, and the message "Delete '*code*' award? (Y/N)" appears.

9. Select **Yes**. The message "*Code* has been deleted" appears in the comment line.

10. Do you want to delete cumulative award history for another financial code?
    - If yes, go to step 7.
    - If no, select **Finish**.

11. Do you want to delete cumulative award history for another student?
    - If yes, select **Query** and go to step 4.
    - If no, select **Exit**. The message "Are you sure you want to exit?" appears.

12. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Running the Audit Process

How to Run the Audit Process

Follow these steps to run the audit process to check Aid records (aid_rec) and Student Financial Aid records (stufa_rec), verify aid fund balances, and update any error conditions found after making any changes.

Note: Jenzabar recommends that you run the audit process on a regular basis to ensure fund balances are accurate and to correct any errors found. You should run the process before posting financial aid. For more information about posting financial aid, see the *Student Billing User Guide*.

CAUTION: You should run the audit process when no one else is on the system to avoid any problems with locked records.

1. From the Student Management: Financial Aid Main menu, select the menu option Audits. The Financial Aid: Audit menu appears.
2. Select the menu option Audit - With Update. The Audit - With Update screen appears.

   Note: This option may be password protected. Contact your Jenzabar coordinator if you need help accessing this option.
3. Enter the financial aid award year and the financial packaging method code and select **Finish**. The Output Parameters and Scheduling window appears.
4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: Audit menu reappears.

   Note: For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.

If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system runs the process for the parameters you specified. After the system completes the process, it sends you e-mail informing you if it completed successfully.

SECTION 4 - DISPLAYING FINANCIAL AID INFORMATION

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Display current financial aid fund balances
- Display a student's awarded and posted financial aid amounts
- Verify a student's compliance to awarded financial aid
- Display the compliance requirements for a financial aid type

Before You Begin

Before you begin to use the following procedures for displaying financial aid information, remember:

- An ID record for the student must already exist on the system.
- The student does not have to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in this guide when you complete the fields on the screens.

Process

The following list shows the general phases that take place before displaying financial aid information.

1. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information.
2. Query a student's financial aid record(s) to display them on the Financial Aid Entry screen.
3. Display financial aid information.

Commands to Use

Select the following commands to display financial aid information for a student:

- **Funds** - To access the Current Fund Balances screen enabling you to view the current financial aid fund balances information.
- **Disbursed** - To access the Award Disbursements screen enabling you to view a student's awarded aid and the amount of each award that has been disbursed in total and for each session.
- **Verify-Comp** - To verify a student's compliance on each award displayed.
- **Compliance** - To access the Compliance Requirements screen enabling you to view a student's compliance results for a specific type of financial aid.

Note: You can display current fund balances and compliance requirements for any aid before awarding financial aid to a student regardless of the particular student's award(s) that currently appear in the Financial Aid Entry screen.

Displaying Current Fund Balances

How to Display Current Fund Balances

Follow these steps to display current fund balances.

Note: This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Funds**. The Current Fund Balances screen appears.
2. Select **Query** and enter the necessary information in the appropriate fields.

   Note:
   - If your institution makes distinctions among students, such as new or returning, you can split fund balances among the different categories, and you must enter a value in the Category field. Otherwise, leave this field blank.
   - In the Balance Type field, enter a method to view the fund balance information from aid packaging simulation records or enter **ACT** (default method) for the actual fund amounts.
3. Select **Finish**. The fund balance information appears.
4. Do you want to view another financial aid fund balance?
   - If <u>yes</u>, go to step 2.
   - If <u>no</u>, select **Close**. The Financial Aid Entry screen reappears.

Displaying Awarded and Disbursed Financial Aid

How to Display Awarded and Disbursed Financial Aid

Follow these steps to display awarded and disbursed financial aid.

Note: This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Disbursed**. The Award Disbursements screen appears, displaying the student's awarded aid and the amount of each award that has been disbursed. The system displays this information in total and for each session. The sessions displayed depend on the sessions you entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four.

   Note: If the student's disbursed amount is not equal to the awarded amount for a financial aid award, an asterisk (*) appears to the left of the code, and the message "(*) Disbursed amount is not equal to the awarded amount." appears in the comment line.

2. Do you want to display up-to-date award disbursement information for the student?
   - If yes, select **Re-Execute**. If the student's award disbursement information has changed since you (or another user) last accessed the Award Disbursements screen, the system updates the information displayed on the screen.
   - If no, go to step 3.

3. Do you want to display a student's refund amount?

   Note: You can access the Refunds screen if your institution refunds unused financial aid to students, if the system is set up to utilize the Refundable Aid processes, and if the student has refundable aid awarded. For more information, see the section *Refunding Financial Aid* in this guide.

   - If yes, select **Refund**. The Refunds screen appears, enabling you to view refundable financial aid amounts and to interactively move refundable financial aid from the Student Accounts (S/A) to the Student Refunds (S/R) prior to processing a refund check. The system also displays any checks processed from refundable financial aid.
   - If no, go to step 4.

4. When you finish viewing the student's awarded and disbursed awards, select **Close**. The Financial Aid Entry screen reappears.

Displaying Compliance to Financial Aid

How to Display Financial Aid Compliance Information

Follow these steps to display financial aid compliance information for any of the following reasons:

- To verify a student's compliance for each displayed financial aid award.
- To view the institution's compliance requirements for any financial aid code/fund and the student's compliance results whether or not the aid has been awarded to the student.
- To view the sequence of criteria associated with the compliance requirements and the student's compliance results for each criterion.

> **Note:** This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, do you want to verify a student's compliance for all awards displayed?
   - If yes, select **Verify-Comp**. The message "Verifying compliances..." appears in the comment line.

     > **Note:** If the student passes compliance for all awards displayed, the message "Award compliance is met on all displayed financial aid." appears in the comment line. If the student fails compliance for any award displayed, the message "(*) Aid failed compliance. Use the Compliance command to see more detail." appears in the comment line, and an asterisk (*) appears to the left of each award for which the student fails to meet compliance requirements.

   - If no, go to step 2.
2. Do you want to view the institution's compliance requirements for a specific type of financial aid award?
   - If yes, select **Compliance**. The Compliance Requirements screen appears with the cursor in the Aid field.
   - If no, go to step 8.
3. Enter the type of aid for which you want to view compliance requirements, and select **Finish**. Your institution's compliance requirements for that aid appears.
4. Do you want to view the sequence of criteria associated with a compliance requirement and the student's compliance results for each criterion?
   - If yes, select **Detail**. The Type field in the Requirements segment becomes active (i.e., a dotted square appears around the type).
   - If no, go to step 8.
5. Move the cursor to the requirement for which you want to view the sequence of criteria. Use the **<Arrow>** keys, and **Forward** and **Back** to move the cursor to the appropriate line. Select **Finish**. The Compliance Detail Information screen appears displaying the sequence of criteria for the requirement and the student's results.
6. When you have completed viewing the sequence of criteria, select **Close**. The Compliance Requirements screen reappears.
7. Do you want to view the sequence of criteria associated with another compliance requirement and the student's compliance results for each criterion?
   - If yes, go to step 4.
   - If no, go to step 8.
8. Do you want to view the institution's compliance requirements for another specific type of financial aid award?
   - If yes, select **Query** and go to step 3.

- If no, select **Close**. The Financial Aid Entry screen reappears.

SECTION 5 - USING THE SATISFACTORY ACADEMIC PROGRESS PROCESSES

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Select students to be processed for Satisfactory Academic Progress (SAP)
- Process selected students for SAP compliance
- Perform SAP actions
- Create the Contact Status Report by Contact Resource to produce a list of students whose records have been updated by the SAP processes
- Create a SAP Listing Report to verify students' SAP statuses

The SAP processes review the academic progress of financial aid recipients at the end of each session as well as at the end of the year. Conditions checked by the system include each student's minimum grade point average, cumulative earned hours, and percentage of the current year and session attempted hours.

The SAP Compliance process compares a student's records with the compliance criteria as determined by your institution and updates specific fields in the student's records. The awarding and posting process uses these updated fields to determine the student's aid level.

Before You Begin

Before you begin to use the procedures for running the SAP processes, remember the following:

- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- Your institution must determine the criteria that students' records are compared to during the SAP compliance process.
- Your institution must also determine under what conditions certain actions will be taken. These actions might include sending warning letters or placing financial aid on hold.
- You run all SAP processes in the background. When the system completes each process, it sends e-mail informing you if the process completed successfully and what action was taken for each student.
- You should run all SAP processes consecutively. After you run the select and compliance processes, you can create the Contact Status Report by Contact Resource for a list of students who had SAP contact(s) added to their records. For more information, see *How to Create the Contact Status Report by Contact Resource* in this section.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in this guide when you complete the fields on the screens.

Process

This list shows the general phases that take place before, during, and after running the SAP processes.

1. Select the students to be processed for SAP. The system selects those students who have been awarded aid that applies to SAP, and all sessions to be considered must be passed. The system creates a SAP contact with an expected status for all selected students.
2. Process selected students for SAP compliance. The system updates the SAP contact status to completed and creates a SAP action contact with an expected status for each student requiring action. The system also updates the SAP and Prev SAP fields on the Need

Analysis Information segment of the Need Analysis Information screen. For more information, see the *Financial Aid Need Analysis User Guide*.

3. Perform the defined action for each student who has a SAP action contact with an expected status. The system selects those students with a SAP action contact with an expected status, performs actions on the students based on values in the Financial SAP Action table (fasapact_table), and updates the status to completed. Actions taken can include holding certain aid, creating letters, or notifying advisors. Creating letters and notifying advisors is simplified by creating a contact for the appropriate letter or reports, which you can produce for those students who have the contact.

   Note: For more information about using contacts to create letters and to notify advisors, see the *Communications Management User Guide*.

Selecting Students to Be Processed for SAP

How to Select Students to Be Processed for SAP

Follow these steps to select students to be processed for SAP.

1. From the Financial Aid: SAP Processing menu, select the menu option Select SAP IDs. The Select SAP IDs screen appears.
2. Change the parameters, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: SAP Processing menu reappears.

   Note: For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.

If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have been awarded aid that applies to SAP and adds the SAP contact with an expected status to those records it finds. After the system completes the process, it sends you e-mail informing you if it completed successfully and the name of the file in your home directory that provides additional information.

Note: If you want to see a list of those students who had the SAP contact added to their records, see *Creating the Contact Status Report by Contact Resource* in this section.

Processing Selected Students for SAP Compliance

How to Process Selected Students for SAP Compliance

Follow these steps to process selected students to be processed for SAP compliance.

Note: If your institution creates multiple SAP tracks and SAP action contacts, run this process for each track and contact.

1. From the Financial Aid: SAP Processing menu, select the menu option SAP Compliance Process. The SAP Compliance Process screen appears.
2. Enter the appropriate information in the following fields. Change the other parameters, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
   - Resource
   - SAP Track
   - SAP Compliance Criteria
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students with an expected SAP contact, updates it to completed, and adds a SAP action contact with an expected status for each student requiring action. The system also updates the SAP and Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen. After the system completes the process, it sends you e-mail informing you if it completed successfully and lists the ID numbers that were processed.
   - For more information about the Need Analysis Information screen, see the *Financial Aid Need Analysis User Guide*. If you want to see a list of those students who had the SAP action contact added to their records, see *Creating the Contact Status Report by Contact Resource* in this section.

Example of SAP Compliance Process Parameters

The following parameters can be used to process SAP compliance:

Resource	Tickler	FA Yr	Session	Year	Prog	Track	Criteria	PASS	FAIL	Contact
SELCTSAP	FY97	9798	FA	1997	UNDG	FINAID	GEN	PASS	FAIL	SAPACTIN

Performing SAP Actions

Introduction

The SAP Action process performs the following actions for each student who does not meet SAP:

- Selects the students with a SAP action contact with an Expected status
- Performs actions on the students' records based on values in the SAP Action table

Actions taken can include, for example, holding certain aid, creating contacts for letters, updating the current SAP status, adding more contacts, or updating other fields on the system.

How to Perform SAP Actions

Follow these steps to perform the necessary SAP actions for selected students.

Note: If your institution creates multiple SAP tracks and SAP action contacts, run this process for each track and contact.

1. From the Financial Aid: SAP Processing menu, select the menu option SAP Action Process. The SAP Action Process screen appears.
2. Enter the appropriate information into the following fields. Change the other parameters, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
   - Resource
   - SAP Track
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students with an expected SAP action contact, performs the actions based on values in the Financial SAP Action table (fasapact_table), and updates the contact status to completed. After the system completes the process, it sends you e-mail informing you if it completed successfully and what action was taken for each student.

Running Reports After SAP Actions

You can run the Contact Status report and the SAP Listing report after the SAP Action process completes to view the changes resulting from the SAP Actions. When you run the Contact Status report to view the changes, use the SAP Action contact rather than the SAP Selection contact.

Creating the Contact Status Report by Contact Resource

How to Create the Contact Status Report by Contact Resource

After you select students to be processed for SAP and process them for SAP compliance, you can produce a list of students whose records the system updated by creating the Contact Status Report by Contact Resource. Follow these steps to create the report.

1. From the Financial Aid: SAP Processing menu, select the menu option Contact Range. The Contact Range screen appears.
2. Enter the name of the contact (i.e., the SAP contact or the SAP action contact) in the First and Second fields, using the same contact (e.g., SELCTSAP) in both fields. Select **Finish**. The Output Parameters and Scheduling window appears.

   Note: Ensure E appears in the Status field to include the students who had the contact added to their records.
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for those students who have the contact you specified with an expected status and creates the report. After the system completes the process, it sends you e-mail informing you if it completed successfully. If you sent the report to a file, it includes the name of that file in your home directory.

Creating a SAP Listing Report

How to Create a SAP Listing Report

After the SAP Compliance process, you can run the SAP Listing report to determine which students passed or failed the criteria used in that process. You can also create a list of students with a specified SAP status to verify students' SAP statuses after you complete the SAP Action process. Follow these steps to create the SAP Listing report.

1. From the Financial Aid: SAP Processing menu, select the menu option SAP Listing. The SAP Listing screen appears.
2. Enter the appropriate information in the fields, and select **Finish**. The Output Parameters and Scheduling window appears.
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.

Note:

- For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
- If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for those students who match the criteria you specified and creates the report. After the system completes the process, it sends you e-mail informing you if it completed successfully. If you sent the report to a file, it includes the name of that file in your home directory.
- If you run this report after the SAP Action process is completed, the students will have a SAP code based on the SAP Action table.

SECTION 6 - REFUNDING FINANCIAL AID

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Refund financial aid using ID numbers
- Create refund contacts and calculate fees in students' accounts
- Create reports listing students who have been selected to have refund checks produced
- Post refundable aid from the Student Accounts (S/A) to the Student Refunds (S/R)
- Manually enter updates/corrections to students' refunds
- Create check register reports

Note: You can use these procedures only if your institution refunds unused financial aid to students, if the system is set up to utilize the Refundable Aid processes, and if the student has refundable aid awarded.

Before You Begin

Before you begin to use the following procedures for refunding aid, remember:

- In order for the Refundable Aid processes to function correctly, all of the following products must be set up on CX. Check with your Jenzabar coordinator to verify that these processes are available:
  - Financial Aid Posting
  - Fee Collection
  - Third Party Billing
- The student must have the following records existing on the system:
  - ID record
  - Program Enrollment record
  - Student Academic record
  - Student services record
  - Subsidiary Account record
  - Financial Aid record
- The student's financial aid must be posted.

  Note: For more information about posting financial aid by running the Post Financial Aid process, see the *Student Billing User Guide*.

- Cashier and Fee Collection should be run on the student.

  Note: For more information about running the Cashier and Fee Collection processes, see the *Cashier User Guide* and the *Fee Collection User Guide*.

- You can use the field descriptions in the section *Using the Financial Aid Screens* in this guide when you complete the fields on the screens.

Refunding Aid Using ID Numbers or Contacts

Your institution has the option to refund financial aid either using ID numbers or contacts. To refund aid using ID numbers, the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) must be enabled. To use contacts, enable the Refund by Contact macro (ENABLE_FEAT_RFND_CTC). In addition, your Jenzabar coordinator must perform some further system modifications.

Group Award Periods

The Refundable Aid processes in the standard CX are designed to be executed for groups of students who have been awarded financial aid during a time period as determined by your institution (e.g., May 15 through May 31). The institution's specified time period for a group of students is called a Group Award Period (GAP).

Required Table Entries

If your institution refunds financial aid using contacts, the following tables must contain specific entries for the Refundable Aid processes to work properly.

- The Contact table (ctc_table) must contain a series of entries with a numbered suffix for financial aid check refunds (e.g., FACHK*XXX*). The suffix of each refund entry must correspond to an associated Group Award Period (GAP) number. For example, FACHK001 would correspond to financial aid refund checks for GAP 001.
- The Tickler table (tick_table) must contain the tickler code, RFND, which is used specifically for the Refundable Aid processes.

Refundable Aid Menu

Following are the menu options available on the Refundable Aid menu and any sub-menu options including a brief description of each.

Financial Aid Entry
Accesses Financial Aid Entry program when you need to access the Refunds screen to manually modify students' refund amounts.

Post Refunds-Contacts
This is the second step in the Refundable Aid processes to refund aid using contacts. Posts refundable financial aid from the Student Accounts (S/A) to the Student Refunds (S/R) for every contact added when you run the Refund-Contacts process.

Note: This menu option is only available if the Refund by Contact macro (ENABLE_FEAT_RFND_CTC) is enabled.

Post Refunds-ID
This is the second step in the Refundable Aid processes to refund aid for specific ID numbers. Posts refundable financial aid from the Student Accounts (S/A) to the Student Refunds (S/R) for the ID number you specify or for all qualifying ID numbers.

Note: This menu option is only available if the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) is enabled.

Refund-Contacts
This is the first step in the Refundable Aid processes to refund aid using contacts. Creates contacts for students who are to receive a refund. Also runs the Batch Fee Calculation process for all students with refund contacts.

Note: You must enter the same contact and tickler for each disbursement with the same aid, site (if applicable), session, year, and refund percentage. This menu option is only available if the Refund by Contact macro (ENABLE_FEAT_RFND_CTC) is enabled.

Refund-ID
This is the first step in the Refundable Aid processes to refund aid for specific ID numbers. Refunds unused financial aid for the ID number you specify or for all qualifying ID numbers. Also runs the Batch Fee Calculation for the ID number you specify or for all qualifying ID numbers.

Note: This menu option is only available if the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) is enabled.

Reports Menu

Accesses the Refundable Aid: Reports menu. The sub-menu options are described below:

- Enrollment Variance-Fund - Generates a variance report for up to three aid codes similar to the Refund Eligible-Fund process but provides additional variance information. Can also be run before the Refund-Contacts process to preview the list of contacts the system will create.
- Refund Eligible-Fund - Generates a proof list report (Expected Refund Proof List) of eligible refundable aid checks for the specified tickler and resource codes, sorted by aid.
- Refund Eligible-Student - Generates a proof list report (Expected Refund Proof List) of eligible refundable aid checks for the specified tickler and resource codes, sorted by ID number.
- Refund Check-Fund - Generates a check register of refundable aid checks, sorted by aid.
- Refund Check-Student - Generates a check register of refundable aid checks, sorted by ID number.

Process to Refund Financial Aid Using ID Numbers

The following list shows the general phases that take place before, during, and after you run the Refunding Aid processes to refund financial aid using ID numbers.

1. Access the Refundable Aid menu from the Financial Aid: Student Processing menu.
2. Select the menu option Refund-ID, make appropriate entries, and execute the process.
3. Select the menu option Reports Menu to access the Refundable Aid: Reports menu.
4. Select the following menu options to create the Expected Refund Proof List report:
   - Refund Eligible-Fund (sorted by aid)
   - Refund Eligible-Student (sorted by ID number)
5. Use the reports to verify that the refund information was correct. Determine those students who should:
   - Not receive a check
   - Receive a greater or lesser refund amount
6. For those students who you identified above, access the Financial Aid: Document Tracking menu and select the menu option Contact Entry/Display. For each student, select **Auto-Mode,** perform a query, and access the student's Contacts window. Change the refund contact status to one of the following. When completed, select **Finish**.
   - C (Completed) - For students receiving greater or lesser refund amounts
   - V (Voided) - For students not receiving refunds
7. Return to the Refundable Aid menu and select the menu option Post Refunds-ID. Make appropriate entries and execute the process.
8. For those students who should receive greater or lesser refund amounts, access Financial Aid Entry and enter parameters for updating financial aid information. For each student, perform a query, access the Award Disbursements screen, then access the Refunds screen. Set the student's refund amount and select **Finish**. When completed, exit from Financial Aid Entry.
9. Return to the Refundable Aid: Reports menu and select the following menu options to create reports. The reports list the students receiving refunds and the total amounts being refunded from each financial aid program.
   - Refund Check-Fund (sorted by aid)
   - Refund Check-Student (sorted by ID number)
10. Submit the reports to your institution's Business office.

Process to Refund Financial Aid Using Contacts

The following list shows the general phases that take place before, during, and after you run the Refunding Aid processes to refund financial aid using contacts.

1. Access the Refundable Aid menu from the Financial Aid: Student Processing menu.
2. Select the menu option Refund-Contacts, make appropriate entries, and execute the process.
3. Select the menu option Reports Menu to access the Refundable Aid: Reports menu.
4. Select the following menu options to create the Expected Refund Proof List report:
   - Refund Eligible-Fund (sorted by aid)
   - Refund Eligible-Student (sorted by ID number)
5. Use the reports to verify that the refund information was correct. Determine those students who should:
   - Not receive a check
   - Receive a greater or lesser refund amount
6. For those students who you identified above, access the Financial Aid: Document Tracking menu and select the menu option Contact Entry/Display. For each student, select **Auto-Mode** perform a query and access the student's Contacts window. Change the refund contact status to one of the following. When completed, select **Finish**.
   - C (Completed) - For students receiving greater or lesser refund amounts.
   - V (Voided) - For students not receiving refunds.
7. Return to the Refundable Aid menu and select the menu option Post Refunds-Contacts. Make appropriate entries and execute the process.
8. For those students who should receive greater or lesser refund amounts, access Financial Aid Entry and enter parameters for updating financial aid information. For each student, perform a query, access the Award Disbursements screen, then access the Refunds screen. Set the student's refund amount and select **Finish**. When completed, exit from Financial Aid Entry.
9. Return to the Refundable Aid: Reports menu and select the following menu options to create reports. The reports list the students receiving refunds and the total amounts being refunded from each financial aid program.
   - Refund Check-Fund (sorted by aid)
   - Refund Check-Student (sorted by ID number)
10. Submit the reports to your institution's Business office.

Refunding Financial Aid Using ID Numbers

How to Refund Financial Aid Using ID Numbers

Follow these steps to refund financial aid using ID numbers.

1. From the Refundable Aid menu, select the menu option Refund-ID. The Refund-ID screen appears.
2. Enter the necessary information in the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: Generally, you enter **0** (zero) in the ID# field to process all qualifying students.
3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who meet the criteria you specified and runs the Batch Fee Calculation for those students it finds. After the system completes the process, it sends you e-mail informing you if it completed successfully.

Creating Refund Contacts

How to Create Refund Contacts

Follow these steps to create refund contacts for students in a GAP.

1. From the Refundable Aid menu, select the menu option Refund-Contacts. The Refund-Contacts screen appears.
2. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: You must enter the same contact (e.g., FACHK001) and tickler (i.e., RFND) for each disbursement with the same aid, site (if applicable), session, year, and refund percentage.

3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who meet the criteria you specified, runs the Batch Fee Calculation, and adds the refund contact with an expected status to those records it finds. After the system completes the process, it sends you e-mail informing you if it completed successfully.

Updating Refund Contact Statuses for Individual Students

Introduction

For those students who should not receive a check or who should receive either a greater or lesser refund amount, you must manually update the refund contact status. To determine who those students are, you must first create the Expected Refund Proof List report. You can create the report in two formats: the Refund Eligible-Fund sorts the information by aid and the Refund Eligible-Student sorts it by ID number.

After you review the reports and ascertain those students whose refund contact status should be updated, you access the students' Contact records and change the refund contact status to one of the following:

- C (Completed) - For students receiving greater or lesser refund amounts
- V (Voided) - For students not receiving refunds

How to Create the Expected Refund Proof List Reports

Follow these steps to create both formats of the Expected Refund Proof List reports you use to determine those students whose refund contact status should be updated.

1. From the Refundable Aid menu, select the menu option Reports Menu. The Refundable Aid: Reports menu appears.
2. Select the menu option Refund Eligible-Fund. The Refund Eligible-Fund screen appears.
3. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: You must enter the refund contact in the Resource field.

4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid: Reports menu reappears.

   Note: If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who have the refund contact with an expected status in their Contact records and creates the report (sorted by aid). After the system completes the process, it sends you e-mail informing you if it completed successfully.

5. Select the menu option Refund Eligible-Student. The Refund Eligible-Student screen appears.
6. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: You must enter the refund contact in the Resource field.

7. Change the fields on the window so the program executes according to your needs, and select **Finish.** The Refundable Aid: Reports menu appears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who have the refund contact with an expected status in their Contact records and creates the report (sorted by ID number). After the system completes the process, it sends you e-mail informing you if it completed successfully.

How to Update Refund Contact Statuses

Review the two Expected Refund Proof List reports to determine if students exist who:

- Should not receive a check but have Contact records indicating they should receive a check
- Should receive a refund check for greater or lesser than the batch process percentage

If there are students who meet one or both of the criteria above, follow these steps to manually update the refund contact statuses for those students.

1. From the Financial Aid: Documentation Tracking menu select the menu option Contact Entry/Display. The Contact Entry/Display screen appears.
2. Enter the appropriate financial aid award year and select **Finish**. The Contact Entry screen appears.
3. Select **Auto-Mode**.
4. Enter the student's ID number from the report, and select **Select**. The student's data appears.
5. Select **Detail**. The Detail window appears.
6. Select **Contacts**, then **OK**. The Contact Entry window appears in Update mode.
7. Locate the refund contact (e.g., FACHK001). You can use **Back** and **Forward** to move backward and forward one full screen of data, or you can use the **<Arrow>** keys to move one line at a time.
8. Press **<Tab>** to move the cursor to the Stat field, and change the status value to one of the following codes:
    - **C** (Completed) - For students receiving greater or lesser refund amounts
    - **V** (Voided) - For students not receiving refunds

    Note: For all students for whom you set the Contact status to C, you must manually set the refund amount in the Refunds screen from Financial Aid Entry. For more information, see *Manually Setting Refund Amounts* in this section.
9. Select **Finish**. The Contact Entry window disappears.
10. Select **Finish**.
11. Do you need to update another student's refund contact status?
    - If yes, go to step 4.
    - If no, select **Cancel**, then select **Exit**. The message "Are you sure you want to exit?" appears.
12. Select **Yes**. The Financial Aid: Document Tracking menu reappears.

Posting Refundable Financial Aid

Introduction

This section provides two procedures for posting refundable financial aid: one if your institution uses ID numbers to refund financial aid and one if your institution uses contacts.

Note: You must run either the Refund-ID or the Refund-Contacts process, depending on what your institution uses to refund financial aid, before you run either of these procedures.

How to Post Refundable Financial Aid Using ID Numbers

Follow these steps to refund financial aid using ID numbers.

1. From the Refundable Aid menu, select the menu option Post Refunds-ID. The Post Refunds-ID screen appears.
2. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: You can enter multiple financial aid codes to process more than one aid program. If you enter more than one code, separate each with a comma. The number you enter in the Percentage field determines the amount to be moved/posted to the Student Refunds (S/R). For example, if you make two payments in a term-percentage, enter **50** as the first payment. Then the next time you run the process, enter **100** to refund the remaining amount.

3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system posts the refundable financial aid for those students to the Student Refunds (S/R). After the system completes the process, it sends you e-mail informing you if it completed successfully.

How to Post Refundable Financial Aid Using Contacts

Follow these steps to refund financial aid for students in a GAP using contacts.

1. From the Refundable Aid menu, select the menu option Post Refunds-Contacts. The Post Refunds-Contacts screen appears.
2. Enter the necessary information in the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: You can enter multiple financial aid codes to process more than one aid program. If you enter more than one code, separate each with a comma. You must enter the refund contact in the Resource field.

3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.

   Note: For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.

If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system does the following:

1. Searches the database for all students who have the refund contact with an expected status in their Contact records.
2. Updates the contact status to completed.
3. Posts the refundable financial aid for those students to the Student Refunds (S/R).

After the system completes the process, it sends you e-mail informing you if it completed successfully.

Manually Setting Refund Amounts

Introduction

You must manually set the refund amount in the Refunds screen from Financial Aid Entry for all students for whom you set the Contact status to C (Completed) in the procedure *How to Update Contact Statuses*. For more information, see *Updating Refund Contact Statuses for Individual Students* in this section.

How to Manually Set Refund Amounts

Follow these steps to manually set the refund amount for individual students.

1. From the menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

   Note: You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
5. Select **Disbursed**. The Award Disbursements screen appears.
6. Select **Refund**. The Refunds screen appears.

   Note: If the Business office posted refundable aid to the student, the screen appears in Update mode with the cursor in the Applied field.
7. Increase the amount appearing in the Applied field by the amount of the refund you want the student to receive. For example, if the student has a $1000.00 Pell award, $100.50 in fees have been applied against it, and you want the student to receive a refund of $500.00, you would enter $600.50.
8. Select **Finish**. The Transfer Monies window appears with the cursor in the Payment Due Date field.
9. Enter the date by which the payment should be made to the student in the Payment Due Date field and select **Finish**. The Refunds screen reappears, and the system enters the appropriate values in the Aid, Ref Amt, and Due Date fields on the right side of the screen.

   Note: You can also change the amount of the refund by changing the amount in the Payment Amount field.
10. Do you want to change the due date by which the check should be written or schedule multiple payments to be made to the student on different dates for the same refund?
    - If <u>yes</u>, select **Switch Sides**. The cursor moves to the Due Date field. Enter the new due date, if necessary. Go to step 10.
    - If <u>no</u>, go to 15.

Note: Ensure the cursor appears on the row for which you want to change the due date or schedule multiple payments.

11. Do you want to schedule multiple payments to be made to the student on different dates for the same refund?
    - If yes, select **Split** and the Split Payment window appears. Go to step 11.
    - If no, go to 13.
12. Enter the amount of the first payment in the Ref Amt field and press **<Tab>** to move the cursor to the Due Date field. Enter the due date for the first payment.
13. Select **Add-Payment** and enter the amount of the next payment. Press **<Tab>** to move the cursor to the Due Date field. Enter the due date for the next payment.

    Note: The system recalculates each new payment based on the total refund to be made less each payment you enter. Repeat this step for each payment to be made until the total payments equals the total amount of the refund.
14. Select **Finish**. The Refunds screen reappears, and the system enters the appropriate values in the Aid, Ref Amt, and Due Date fields on the right side of the screen for each payment to be made.
15. Do you want to refund another aid type?
    - If yes, select **Switch Sides**, and the cursor moves to the Applied field. Press **<Tab>** to move to the next aid type and go to step 6.
    - If no, go to 15.
16. Select **Finish**. The Award Disbursements screen reappears.
17. Select **Close**. The Financial Aid Entry Screen reappears.
18. Do you want to manually set the refund amount for another student?
    - If yes, select **Query** and go to step 3.
    - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
19. Select **Yes**. The menu reappears.

Creating Refund Check Register Reports

Introduction

You create a check register report to give to your institution's Business office, which uses them to print the required refund checks. You can create the check register in two formats: the Refund Check-Fund sorts the information by aid and the Refund Check-Student sorts it by ID number.

How to Create Refund Check Register Reports

Follow these steps to create both formats of the check register which you submit to your institution's Business office.

1. From the Refundable Aid menu, select the menu option Reports Menu. The Refundable Aid: Reports menu appears.
2. Select the menu option Refund Check-Fund. The Refund Check-Fund screen appears.
3. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid: Reports menu reappears.

   Note: If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who match the criteria you specified and creates the report (sorted by aid). After the system completes the process, it sends you e-mail informing you if it completed successfully.
5. Select the menu option Refund Check-Student. The Refund Check-Student screen appears.
6. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
7. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid: Reports menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who match the criteria you specified and creates the report (sorted by ID number). After the system completes the process, it sends you e-mail informing you if it completed successfully.
8. When you have the reports, submit them to the Business office which prints the refund checks following its normal check production process.

   Note: If you processed more than one GAP (e.g., FACHK001 through FACHK005), the check processing system cannot distinguish among the groups. The system creates all the checks as one group. If necessary, separate the checks into the appropriate groups, then using the reports, separate the checks into the appropriate GAPs.

SECTION 7 - USING FINANCIAL AID COMMENTS

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Display a comment associated with a student's financial aid
- Add a comment associated with a student's financial aid
- Update a comment associated with a student's financial aid
- Delete a comment associated with a student's financial aid
- Print a comment associated with a student's financial aid

Before You Begin

Before you begin to use the following procedures for financial aid comments, remember:

- An ID record for the student must already exist on the system.
- The student does not have to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in this guide when you complete the fields on the Comments screen.

Process

The following list shows the general phases that take place before, during, and after editing and printing comments associated with financial aid records.

1. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information.
2. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
3. Use the **Text** command to access the Comments screen.
4. View, add, update, and/or delete any comment associated with the student's financial aid.
5. Exit from Financial Aid Entry.
6. Access the Print Text Comments screen to print the comments, if necessary.

Adding Financial Aid Comments

How to Add Financial Aid Comments

Follow these steps to add financial aid comments.

Note: This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Text**. The Comments screen appears.
2. Click on the Comments button to display the blob text window.
3. Enter your comments in the blob text window.

   Note: Jenzabar recommends that you enter your name and date after the comments.
4. Select **File** from the menu bar of the blob text window, then select **Update and Exit**. The Comments screen reappears, and the first line of the comment appears on the Comments button.
5. Select **Finish**. The Financial Aid Entry screen reappears.

   Note: After you enter a comment, the word TEXT appears highlighted to the left of the Rev field on the Financial Aid Entry screen.

Updating Financial Aid Comments

How to Update Financial Aid Comments

Follow these steps to update financial aid comments.

Note: This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records. If a comment exists for the student, the word TEXT appears highlighted to the left of the Rev field on the Financial Aid Entry screen.

1. From the Financial Aid Entry screen, select **Text**. The Comments screen appears.
2. Click on the Comments button to display the blob text window.
3. Update the comments in the blob text window.

   Note: Jenzabar recommends that you enter your name and date after the comments.
4. Select **File** from the menu bar of the blob text window, then select **Update and Exit**. The Comments screen reappears, and the first line of the comment appears on the Comments button.
5. Select **Finish**. The Financial Aid Entry screen reappears.

Deleting Financial Aid Comments

How to Delete Financial Aid Comments

Follow these steps to delete financial aid comments.

Note: This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records. If a comment exists for the student, the word TEXT appears highlighted to the left of the Rev field on the Financial Aid Entry screen.

1. From the Financial Aid Entry screen, select **Text**. The Comments screen appears.
2. Click on the Comments button to display the blob text window.
3. Highlight the comment(s) you want to delete, select **Edit** from the menu bar on the blob text window, then select **Delete**.

   CAUTION: Jenzabar recommends using caution when deleting comments as you may lose important information.
4. Select **File** from the menu bar of the blob text window, then select **Update and Exit**. The Comments screen reappears, and the first line of the comment appears on the Comments button.
5. Select **Finish**. The Financial Aid Entry screen reappears.

Printing Financial Aid Comments

How to Print Financial Aid Comments

Follow these steps to print financial aid comments.

1. From the Financial Aid: Student Processing menu, select the menu option Print Text Comments. The Print Text Comments window appears.
2. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: If you want to print one student's comments, enter the same ID number in both the Beginning ID# and Ending ID# fields. If you want to print the comments for a range, enter different ID numbers in the fields.

3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: Student Processing menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for the ID number(s) you specified. After the system completes the process, it sends you e-mail informing you if it completed successfully.

SECTION 8 - MANAGING FINANCIAL AID TRANSCRIPTS

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Update a student's financial aid transcript
- Update a student's financial aid loan history
- Print financial aid transcripts

Before You Begin

Before you begin to use the following procedures for updating and printing financial aid transcripts, remember:

- An ID record for the student must already exist on the system.
- The student's Historical Aid records must be completed as necessary. For more information, see the section *Managing Students' Financial Information* in this guide.
- You cannot print blank financial aid transcript forms.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in this guide when you complete the fields on the screens.

Customizing the Transcript

Your institution should customize the transcript form to display the Financial Aid director's name and your institution's name and address. Although Jenzabar does not recommend making any other changes to the transcript form, your institution can change other items on the form.

While federal law requires that the financial aid transcripts display Title IV aid, your Financial Aid office can determine the other aid codes to print on the transcript. For example, your Financial Aid office may also want other aid codes to print, such as Health Education Assistance, Nursing, and Health Professions loans.

Note: Financial Aid transcripts are normally customized during implementation of CX. See your Jenzabar coordinator if you wish to modify the setup of the financial aid transcript.

What Prints on the Transcript

The Aid table (aid_table) controls what financial aid awards will print on the financial aid transcript. Your Financial Aid office, when adding or updating an aid code in the Aid table, can indicate whether or not to print the financial aid on the transcript by entering **Y** (yes) or **N** (no) in the Print on FA Trans field.

Transcript Printing Order

The Aid table (aid_table) determines the order in which awards print on the transcript. Your Financial Aid office can change the order in which the financial aid appears on the transcript in the Section D Order field. This also controls the print order of financial aid categories in Section D of the transcript form. You can enter financial aid in six categories to indicate which Aid code or codes correspond to the following aid programs:

- 1 - PELL
- 2 - SEOG
- 3 - PERK/NDSL
- 4 - ICL (Income Contingent Loan)
- 5 - SSIG (optional)
- 6 - OTHER (e.g., HEAL, Nursing Loans, or HPSL)

When your institution has more than one aid code that corresponds to a category above, you can enter the same print order number for more than one aid code. The transcript displays a total of all amounts awarded to a student for all of the aid codes.

Loan History

The system creates a separate Loan record for each period and loan amount combination that you enter in the Financial Aid Transcript Loan History screen. A student can have multiple Loan records, if necessary. The system prints the student's borrowing history in Section E of the transcript. After you create Financial Aid Transcript Loan History records, you do not have to re-enter the records every year. The system considers the Financial Aid Loan records as permanent and retains the records from year to year.

Process

The following list shows the general phases that take place before, during, and after you update and print transcripts:

1. Your institution customizes the format of the transcript.
2. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information.
3. Query a student’s financial aid record(s) to appear on the Financial Aid Entry screen.
4. Select **Fa-Trans** to access the Financial Aid Transcript Information screen and add/update the student’s financial aid transcript information.
5. If necessary, select **Loans** to access the Financial Aid Transcript Loan History screen and add/update historical financial aid information.
6. Print financial aid transcript(s).

Updating a Student's Financial Aid Transcript

How to Update a Student's Financial Aid Transcript

Follow these steps to update a student's financial aid transcript.

Note: This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Fa-Trans**. The Financial Aid Transcript Information screen appears.
2. Select **Update**. The cursor appears in the Prev Name field.
3. Enter or change the necessary information in the appropriate fields. Press **<Tab>** to move to each field, if necessary.
4. Select **Finish** to accept your field entries.
5. Select **Close** to return to the Financial Aid Entry screen.

Updating a Student's Financial Aid Loan History

How to Update a Student's Financial Aid Loan Information

Follow these steps to update a student's financial aid loan information.

Note: This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Fa-Trans**. The Financial Aid Transcript Information screen appears.
2. Select **Loans**. The Financial Aid Transcript Loan History screen appears.
3. Select **Update**. The screen goes into Update mode and one loan area becomes active.
4. Is the loan area that you want to update active?
   - If yes, go to step 5.
   - If no, select **Section** until the loan area that you want to update becomes active.
5. Enter or change the necessary information into the appropriate fields.
6. Do you want to update another loan area?
   - If yes, go to step 4.
   - If no, go to step 7.
7. Select **Finish**.
8. Select **Close** to return to the Financial Aid Transcript Information screen.

   Note: If you select **Cancel** to return to the Financial Aid Transcript Information screen, the message: "Abort all loan updates (Y/N)?" appears.
   – If you select **Y**, the system does not save any of your changes
   – If you select **N**, the system saves your changes
9. Select **Close** to return to the Financial Aid Entry screen.

Printing Financial Aid Transcripts

How to Print Financial Aid Transcripts

Follow these steps to print financial aid transcripts.

Note:

- If your Financial Aid office has a dedicated printer with the form type set to *fatran*, the transcript prints immediately. If you need to set the form type to *fatran*, see *Setting Financial Aid Transcript Form Type to Print* in this section.
- This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records. The financial aid transcript is designed to print on standard paper.

1. From the Financial Aid Entry screen, select **Fa-Trans**. The Financial Aid Transcript Information screen appears.
2. Select **Output** and the message, “Print Financial Aid Transcript form (Y/N)?” appears.
3. Select **Yes**. The message “Printing Financial Aid Transcript” appears in the comment line.
4. Select **Close** to return to the Financial Aid Entry screen.

Setting Financial Aid Transcript Form Type to Print

How to Set the Financial Aid Transcript Form Type

Follow these steps to set the financial aid transcript form type on a printer.

Note: Jenzabar recommends that your Financial Aid office obtain its own dedicated printer to print financial aid transcripts. This allows you to load your institution's financial aid transcript form into the printer so you do not have to depend on the Computer Center to print the form.

1. From any screen, select the menu option Utility Menu. The Utilities: Main menu appears.
2. Select the menu option Printer Control. The Utilities: Printer Control menu appears.
3. Select the menu option Display Spooler Status. The Display Spooler Status screen appears.
4. Enter the name of the dedicated printer and select **Finish**. A spooler status report appears displaying all forms queued to print and the associated form types. This information is prefaced by the message "Spooler Status Report for '*printer name*'."
5. When you finish viewing the spooler status, press **<Enter>**. The Utilities: Printer Control menu reappears.
6. Select the menu option Load Form Type. The Load Form Type screen appears.
7. Enter the name of the dedicated printer in the Printer field and the form type (i.e., fatran) in the Output Form Type field. Press **<Tab>** to move to each field, if necessary.
8. Select **Finish**, then press **<Enter>**. The Utilities: Printer Control menu appears.
9. Load the blank paper into the dedicated printer and align the form.
10. Select the menu option Start Printer to cause the printer to start printing. The Start Printer screen appears.
11. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press **<Enter>**. The printer begins to print.
12. Are you finished printing financial aid transcript forms?
    - If yes, select the menu option Clear Form Type and go to step 13.
    - If no, go to step 3.
13. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press **<Enter>**. The Utilities: Printer Control menu reappears.

SECTION 9 - CREATING AWARD NOTIFICATION FORMS AND COVER LETTERS

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Immediately print a student’s award notification form
- Set the award notification form to print
- Schedule a student’s award notification form to print for later batch production
- Select and print award notification forms in a batch process
- Select and print award notification cover letters in a batch process
- Confirm a student’s receipt of an award notification form

Before You Begin

Before you begin to use the following procedures for creating and printing award notification forms, remember:

- An ID record for the student must already exist on the system.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in this guide when you complete the fields on the Financial Aid Entry screen.

Using the Output Command

Before you begin to use the following procedures for printing award notification forms using the **Output** command in the Financial Aid Entry screen, remember the following about Contact records:

- After the system formats the award notification form and sends it to a printer, the Financial Aid Entry program does the following to the student's records:
  - Updates the package status (Pkg field) to P (Pending student acceptance).
  - Increments the award notification form revision number.
  - Adds a contact for the award notification cover letter and a contact for the receipt of a signed award notification, each with an expected status.

Note: The system only performs these updates when the following is true:

- The Contact table (ctc_table) contains entries for the contact and the revision number of the award notification form.
- The system is configured to automatically add contacts for the award notification form used.

Using the Schedule Command

Before you begin to use the following procedures for printing award notification forms using the **Schedule** command in the Financial Aid Entry screen, remember the following about Contact records:

- The system adds a contact for the award notification cover letter and a contact for the receipt of a signed award notification, each with an expected status, when you run the Select Award Notices process.
- The Select Award Notices process updates the status of the scheduled contact (e.g., ANFORM01) for the award notification form created when you selected the **Schedule** command in Financial Aid Entry.

Cover Letter Contacts

Depending on how your institution sets up CX, you have the following two options when creating cover letter contacts:

- Add a cover letter contact with each award notification form printed
- Add a cover letter contact with the production of the initial award notification form

Contact your account manager at Jenzabar if you need additional information.

Document Tracking System Processes

The Financial Aid Document Tracking system automatically tracks a maximum of two award notification forms printed for students and tracks cover letters and receipt of signed award notifications. You are not limited to using only two award notifications, but the Document Tracking system does require further manual processes.

Financial Aid Entry Program Parameters Screen

Before you begin to use the procedures for printing award notification forms, remember the following about the Financial Aid Entry Program Parameter screen:

- Financial aid information entered for the specified award year and sessions print on the award notification form.
- To print a return date on the award notification form, you must enter a date in the Return Date field. This date represents the date by which the student must return the award notification form in order to secure the awards.
- The Financial Aid Entry program uses the Schedule Date field when you use the **Schedule** command on the Financial Aid Entry screen to schedule award notification forms for future batch printing. The program does not use the field when you use the **Output** command on the Financial Aid Entry screen.

Cumulative History Entry

When you enter cumulative history information, you can print award notification forms, but you cannot schedule them. The printing process differs in the following ways:

- No increments to revision numbering
- No upgrades to the package status (Pkg field) from I (Intended package) to P (Pending student acceptance)

Note: Your institution should have little or no need to use the print process in conjunction with entering cumulative history information.

Process

The following list shows the general phases that take place before, during, and after printing award notification forms.

1. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information. If entering award history, select **Cumulative History**.

   Note: When you access Financial Aid Entry, set the award year, session(s), and output form to be used for the award notification forms on the Financial Aid Entry Program Parameters screen. If you are already using Financial Aid Entry, use the **Initialize** command to set these parameters.

2. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
3. If necessary, add/update student financial aid information on the Financial Aid Entry screen.
4. Take one of the following actions:
   - If your Financial Aid office has a dedicated printer to print award notification forms, use the **Output** command to immediately print the forms.

- Use the **Schedule** command to add a scheduling contact with an expected status to allow for later batch production of award notification forms.

5. Did you use the **Schedule** command to print award notification forms?
   - If yes, exit from Financial Aid Entry and access the Student Processing: Award/Cover Letter menu. Go to phase 6.
   - If no, go to phase 10.
6. Execute the Select Award Notices process to select the students who have the scheduling contact with an expected status.
7. After selecting the award notification forms to print, execute the Print Award Notices process to print the forms in batch mode.
8. Execute the Create Cover Letters process to create and format cover letters for students who have the cover letter contact with an expected status.
9. After creating the award notification cover letters, execute the Print Award/Cover Letters process to print the letters in batch mode.
10. When you receive the signed award notice, confirm the receipt by accessing the Financial Aid Entry screen and updating the package status (Pkg field) value for the student.

Award Notification Form Scheduling Process

The following list describes the process the system performs when you schedule award notification forms with the **Schedule** command on the Financial Aid Entry screen.

1. The system adds a scheduled contact with an expected status to the student's Contact record.
2. The Select Award Notices process searches for the scheduled contact with an expected status.
3. The system selects students who were scheduled for printing on or before the schedule date.
4. When the Select Award Notices process finishes, the system sends you an e-mail message informing you if it successfully completed. If so, you can print the award notification forms.

   Note: If the e-mail message contains any errors, contact your Jenzabar coordinator.

Immediately Printing an Award Notification Form

How to Immediately Print an Award Notification Form

Follow these steps to immediately print an award notification form.

Note: The code ANFORM is the default name of your institution's primary award notification form; however, your institution can change this code. You can only print an award notification form for a student whose financial aid records appear on the Financial Aid Entry screen. This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Output**. The message “Print award notice form ‘ANFORM’ for this student (Y/N) (Ctrl-U Change Form)?” appears in the comment line.
2. Take one of the following actions:
   - If you don’t want to print the award notification form, enter **N**. The toolbar reappears and no action occurs.
   - If you want to use ANFORM, enter **Y**. The messages “Loading award notice” then "Printing award notice" appear in the comment line. Go to step 5.
   - If you want to change the form, press **<Ctrl-u>**. The Financial Aid Entry Program Parameters screen appears with the cursor in the Output Form field, and the system prompts you to verify the parameters before printing. Go to step 3.
3. Enter the name of the award notification form you want to use and select **Finish**. The Financial Aid Entry screen reappears, and the message “Print award notice form ‘*form name*’ for this student (Y/N) (Ctrl-U Change Form)?” appears in the comment line, where *form name* is the name of the new award notification form you want to use.
4. Enter **Y**. The messages “Loading award notice” then "Printing award notice" appear in the comment line.
5. Does your Financial Aid office have a dedicated printer with blank forms loaded, and the printer's form type set to the form type of the award notification form?
   - If yes, the system immediately prints the award notification forms on the printer.
   - If no, see *How to Set the Award Notification Form Type* in this section.

   Note: If the award notification form type is not loaded on the printer, or if no form type is loaded on the printer, the award notification forms produced will remain in the printer queue until you change the form type on the printer.

Setting Award Notification Form Type to Print

How to Set the Award Notification Form Type

Follow these steps to set the award notification form type on a printer.

Note: Jenzabar recommends that your Financial Aid office obtain its own dedicated printer to print award notification forms. This allows you to load your institution's award notification form into the printer so you do not have to depend on the Computer Center to print the form.

1. From any screen, select the menu option Utility Menu. The Utilities: Main menu appears.
2. Select the menu option Printer Control. The Utilities: Printer Control menu appears.
3. Select the menu option Display Spooler Status. The Display Spooler Status screen appears.
4. Enter the name of the dedicated printer and select **Finish**. A spooler status report appears displaying all forms queued to print and the associated form types. This information is prefaced by the message "Spooler Status Report for '*printer name*'" where *printer name* is the name of the printer you entered.
5. When you finish viewing the spooler status, press **<Enter>**. The Utilities: Printer Control menu reappears.
6. Select the menu option Load Form Type. The Load Form Type screen appears.
7. Enter the name of the dedicated printer in the Printer field and the form type (i.e., **anform**) in the Output Form Type field. Press **<Tab>** to move to each field, if necessary.
8. Select **Finish**, then press **<Enter>**. The Utilities: Printer Control menu appears.
9. Load the blank paper into the dedicated printer and align the form.
10. Select the menu option Start Printer to cause the printer to start printing. The Start Printer screen appears.
11. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press **<Enter>**. The printer begins to print.
12. Are you finished printing financial aid transcript forms?
    - If <u>yes</u>, select the menu option Clear Form Type and the Clear Form Type screen appears. Go to step 13.
    - If <u>no</u>, go to step 3.
13. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press **<Enter>**. The Utilities: Printer Control menu reappears.

Scheduling Award Notification Forms to Print

How to Schedule an Award Notification Form to Print

Follow these steps to schedule award notification forms for printing.

Note:

- The code ANFORM is the default name of your institution's primary award notification form; however, your institution can change this code. When you schedule an award notification form, the system adds a scheduled contact with an expected status to the student's Contact record. The system searches for this contact to print award notification forms in batch mode.
- You can only schedule an award notification form for a student whose financial aid records appear on the Financial Aid Entry screen. This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Schedule**. The message "Print award notice form 'ANFORM' for this student (Y/N/Ctrl-U Change Form)?" appears in the comment line.
2. Take one of the following actions:
   - If you don't want to print the award notification form, enter **N**. The toolbar reappears and no action occurs.
   - If you want to use the ANFORM, enter **Y**. The messages "Loading award notice" then "Printing award notice" appear in the comment line. Go to step 5.
   - If you want to change the form, press **<Ctrl-u>**. The Financial Aid Entry Program Parameters screen appears with the cursor in the Output Form field and the system prompts you to verify the parameters before printing. Go to step 3.
3. Enter the name of the award notification form you want to schedule to be used and select **Finish**. The Financial Aid Entry screen reappears, and the message "Print award notice form '*form name*' for this student (Y/N/Ctrl-U Change Form)?" appears in the comment line, where *form name* is the name of the new award notification form you want to schedule to be used.

   Note: The Schedule Date field in the Financial Aid Entry Program Parameters screen allows you to print award notification forms in different groups. You can use the schedule date to delay printing award notifications for selected students.
4. Enter **Y**. The system adds the scheduling contact to the student's Contact record.
5. Do you want to schedule another award notification form for another student?
   - If <u>yes</u>, select **Query** to find the student and display his/her financial aid records. Go to step 1.
   - If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.
6. Select **Yes**. The menu reappears.

Selecting Award Notification Forms to Print

How to Select Award Notification Forms to Print

Follow these steps to select award notification forms to be printed.

Note: When you run this process, the system searches for the scheduled contact with an expected status that the system added when you selected the **Schedule** command in Financial Aid Entry. The system then selects award notification forms for those students it finds.

1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
2. Select the menu option Select Award Notices. The Select Award Notice screen appears.
3. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.

   Note: You can include a maximum of four sessions on the same form. The sessions are printed on the form in the order that you enter them.

4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Student Processing: Award/Cover Letters menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have the scheduled contact with an expected status, updates the status to completed, and selects those students to have award notification forms printed. After the system completes the process, it sends you e-mail informing you if it completed successfully.

Printing Award Notification Forms

How to Print Award Notification Forms

Follow these steps to print award notification forms.

1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
2. Select the menu option Print Award Notices and select **Finish**. The Print Award Notices screen appears.
3. Select **Formtype**. The cursor advances to the Type of Form field.
4. Enter the type of form that you want to print (i.e., **anform**) and press **<Tab>** to move the cursor to the Name of Printer field.
5. Enter the name of the printer on which to print the forms and press **<Tab>** to move the cursor to the Station Number field.
6. Enter the station number (if required) and select **Finish**. The message "Please load the ‘anform’ forms into ‘*printer*’" appears, where *printer* is the name of the printer you entered in the Name of Printer field.
7. Load the necessary form type into the printer and select **Loaded**.
8. Select **Start**. The message "Are forms correctly aligned" appears.
9. Do you want to print a test form to ensure the forms are correctly aligned?
   - If <u>yes</u>, select **No**. A test form prints and the message "Are forms correctly aligned" reappears.
   - If <u>no</u>, select **Yes**. The message "Begin printing or Skip this form" appears. Go to step 11.
10. Are the forms correctly aligned?
    - If <u>yes</u>, select **Yes** to continue printing. The message "Begin printing or Skip this form" appears. Go to step 11.
    - If <u>no</u>, select **No** to repeat the alignment test. Go to step 9.
11. Select **Print**. The message "Printing completed" appears in the comment line, and the forms print.
12. Select **Exit**. The message “Are you sure you want to exit?” appears.
13. Select **Yes**. The message "You should change the form type back before changing printers. Change printer '*printer*' to original form type '*form type*'?" appears, where *printer* is the name of the printer you entered in the Name of Printer field and *form type* is the form type usually loaded into the printer.
14. Select **Yes**. The Student Processing: Award/Cover Letters menu reappears.

Creating Award Notification Cover Letters

How to Create Cover Letters

Follow these steps to create award notification cover letters to be printed.

Note: When you run this process, the system searches for the cover letter contact with an expected status that the system added when you selected one of the following commands in Financial Aid Entry. The system then creates cover letters for those students it finds with the contact.

- **Schedule -** To schedule an award notification form.
- **Output -** To immediately print an award notification form.

1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
2. Select the menu option Create Cover Letters. The Create Cover Letters screen appears.
3. Enter or change the necessary information in the appropriate fields and select **Finish**. The Addressing Parameters window appears.
4. Enter or change the necessary information into the appropriate fields and select **Finish**. The Labels Parameters window appears.
5. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.
6. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Student Processing: Award/Cover Letters menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have the cover letter contact with an expected status, updates the status to completed, and selects those students to have cover letters printed. After the system completes the process, it sends you e-mail informing you if it completed successfully.

Printing Award Notification Cover Letters

How to Print Cover Letters

Follow these steps to print award notification cover letters.

1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
2. Select the menu option Print Award/Cover Letters and select **Finish**. The Print Award/Cover Letters screen appears.
3. Select **Finish**. The Print Award/Cover Letters screen with the Files to Be Printed segment appears.
4. Select **File**. This enables you to select the file you want to print from the list in the Files to Be Printed segment in the lower portion of the screen.

   Note: The system designates label-only files with an "L" in front of the filename (e.g., LRECTHANK). The Count field for this type of file always shows one more than the actual number of labels created because the system creates an additional label identifying the label file. Otherwise, the field displays a description of the file followed by "letters" (e.g., Fin Aid Cover Letters) which includes letters and envelopes.

5. Move the cursor to the line with the file you want to print and enter **P** in the Stat field.

   Note: You can use the **Up**, **Down**, **Page Backward**, **Page Forward** commands or the **<Arrow>** keys to move the cursor through the list.

6. Select **Done**. The Subtypes to Be Printed segment appears.
7. Move the cursor to the first subtype you want to print (e.g., envelopes or letters). Enter **P** in the Print field. The cursor moves to the Paper field.
8. Enter the appropriate code for the paper type to use. Generally, you will enter **C** (Continuous).
9. Select **Done**. The Print Log segment appears.
10. Enter **P** in the St field. The cursor moves to the First Pos field.
11. Do you want to print a specific range?
    - If yes, update the numbers in the First Pos and Last Pos fields. Press **<Tab>** to move to the next field, if necessary. For example, to print the first 100 of 200 letters, enter **1** in the First Pos field, then enter **100** in the Last Pos field. The Count field automatically changes to reflect the number to print. You may also change the number in the Count field to the total number to print. The number in the Last Pos field automatically changes, depending on the number entered in the First Pos field and the total count number.
    - If no, go to step 12.
12. Select **Done**. The cursor moves to the Device field in the File to Be Printed segment in the upper portion of the screen.
13. Enter the printer name where you want to print the output or select **Table Lookup** for a list of valid printers.

    Note: This step is skipped if you've already printed a file or a portion of a file (i.e., one subtype) and previously entered the name of the printer.

14. Select **Done**, if necessary. The Current Status segment appears in addition to the message "Print Options."

15. Select **Start Printing**. The message "Printing completed" appears in the comment line.

16. Do you want to print another subtype or file?
    - If yes, go to step 4.
    - If no, select **Exit**. The message "Are you sure you want to exit?" appears.

17. Select **Yes**. The Student Processing: Award/Cover Letters menu reappears.

    Note: If you only printed one subtype (e.g., only letters), the % Done field on the Files to Be Printed segment displays 50 (for 50%) and the Stat field displays W because a portion of the file remains to be printed. If you do not print the remaining portion, or subtype (e.g., the envelopes), you need to manually update the Stat field to D (Done). When all subtypes (e.g., letters and envelopes) are printed, the system automatically updates the status of the file to D (Done).

Confirming Receipt of Award Notification Forms

Introduction

When your Financial Aid office receives signed award notification forms, you use Financial Aid Entry to confirm receipt of the forms and complete the document tracking step for the award notifications.

Note: You can also use the Contact Entry program in the Financial Aid: Documentation Tracking menu to manually confirm the receipt of signed award notification forms. In the Contact Entry window, you update the status (i.e., St field) of the signed award notice contact from expected (E) to completed (C) and enter the date of receipt in the Cmpl Date field.

How to Confirm the Receipt of Award Notification Forms

Follow these steps to confirm the receipt of an award notification form.

Note: You can only confirm the receipt of an award notification form for a student whose financial aid records appear on the Financial Aid Entry screen. This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display his/her financial records.

1. From the Financial Aid Entry screen, select **Update**. The cursor appears in the Prog field.
2. Press **<Tab>** to move the cursor to the Pkg field.
3. Change the package status from **P** (Pending student acceptance) to **A** (Package accepted by student). The message "Default aid statuses to ACCEPTED (Y/N)?" appears.
4. Do you want to default individual aid status for each session for all awards?
   - If <u>yes</u>, enter **Y**. The system updates the individual aid status for each award for each session (i.e., the Ad field) to A (Award accepted by student).
   - If <u>no</u>, enter **N** to designate specific aid codes and amounts as being rejected by the student on an individual basis for the aid code and the session.
5. The message "Confirm that the current award notice form has been received (Y/N)?" appears.
6. Can you confirm that the Financial Aid office has received the current award notification form?
   - If <u>yes</u>, enter **Y**. The system updates the status of the award notification form contact to completed and enters the current date as the completion date. The cursor moves to the Ad field for the first award.
   - If <u>no</u>, enter **N**. The system does not update the status of the award notification form contact to completed. The cursor moves to the Ad field for the first award.
7. Do you want to change or designate specific aid codes and amounts as being rejected by the student on an individual basis for the aid code and the session?
   - If <u>yes</u>, change or enter the necessary information in the appropriate fields and select **Finish**.
   - If <u>no</u>, select **Finish**.
8. The messages “Updating aid records,” "Aid records updated," and “Adjusting financial aid” appear in the comment line.

SECTION 10 - USING FINANCIAL AID REPORTS

Overview

Introduction

This section provides:

- The procedure to generate and print reports
- Information about the standard reports you can produce using Financial Aid

How to Generate and Print Reports

When you select a report from a CX menu, comments on a parameter screen prompt you to enter the following types of parameters:

- Report (e.g., dates, IDs, or document numbers)
- Output (e.g., filenames, printers, dates, and times)

These parameters control the contents of the report and the time and type of output produced.

Follow these steps to generate any of the standard CX reports.

1. Access the desired Reports menu, then select the report you want to generate. A screen containing the processing parameters for the report appears.
2. Enter the required or relevant parameters, then select **Finish**. The Output Parameters and Scheduling window appears.
3. Indicate the type of output you want to produce and the time and day you want to generate the report. Select **Finish** either to generate the report or to schedule it for production on the specified date and time.

   Notes:

   - If you route the output to a file and do not define a name for the file, CX places the output in a file called *filename.out*, where *filename* is the technical name of the report. See *Reports for Financial Aid* for the technical name for each report.
   - For more information about using the Output Parameters and Scheduling window, see *Performing Background Tasks* and *Scheduling Processes* in the *Getting Started User Guide*.

Reports For Financial Aid

Document Tracking Reports

The following reports relate to Document Tracking reports. You can produce each of these reports from the Document Tracking: Reports menu.

Contact Status Report By Student

Menu option: Contact Status
Technical name: ctcstatus
Parameters:
Tickler: Optional - The Contact Record Tickler code (e.g., FY98 for the Financial Aid Tickler for 1998-1999).
Program: Optional - The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.
Status: Required - The Contact Selection Status code for which you wish to create the report. Valid codes are:

- A (All)
- C (Completed)
- E (Expected
- V (Void)

First: Required - The Contact code or the beginning of the Contact code range (e.g., AIDAPPIN for aid application received).
Second: Required - The Contact code or the ending of the Contact code range (e.g., WARN for warning letter).

Contact Status Report By Contact Resource

Menu option: Contact Range
Technical name: ctcrange
Parameters:
Tickler: Optional - The Contact Record Tickler code (e.g., FY98 for the Financial Aid Tickler for 1998-1999).
Program: Optional - The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.
Status: Required - The Contact Selection Status code for which you wish to create the report. Valid codes are:

- A (All)
- C (Completed)
- E (Expected
- V (Void)

First: Required - The beginning Contact code (e.g., AIDAPPIN for Aid Application Received) for which you wish to create the report.
Second: Required - The ending Contact code (e.g., PELLPMT for Pell Payment Reporting) for which you wish to create the report.
Description: Lists contacts in name order for a given tickler, program, and status. The report prints out the name for corresponding ID.
Special considerations: None

Note: You can also access this report from the Student Processing: SAP Processing menu.

Institutional Verification Contact Status Report

Menu option: Verification
Technical name: pellverify
Parameters:

Tickler: Optional - The Contact Record Tickler code (e.g., FY98 for the Financial Aid Tickler for 1998-1999).

Status: Required - The Contact Selection Status code for which you wish to create the report. Valid codes are:

- A (All)
- C (Completed)
- E (Expected
- V (Void)

Contact: Required - The Contact code (e.g., ACCEPTED for accepted for admission) designating institutional verification.

Program: Optional - The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.

Description: Prints information about students who have completed institutional verification.
Special considerations: None

Outstanding Financial Aid Transcripts

Menu option: Outstanding FA Transcripts
Technical name: transreq
Parameters:

Year: Required - The Financial Aid Award Year code (e.g. 9899 for 1998-1999).

Tickler: Optional - The Contact Record Tickler code (e.g., FY98 for the Financial Aid Tickler for 1998-1999).

Description: Prints all the institution's outstanding or expected Financial Aid transcript requested for each student.
Special considerations: None

Financial Aid Termination Report

Menu option: Package Termination
Technical name: termaid
Parameters:

Tickler: Optional - The Contact Record Tickler code (e.g., FY98 for the Financial Aid Tickler for 1998-1999).

Date: Optional - The Contact Completion date (mm/dd/yyyy).

Description: Prints information about all students who have awards that have been rejected, denied, or nullified.
Special considerations: None

Using Financial Aid Audit Reports

Introduction

The Financial Aid Audit reports allow you to maintain an audit trail of all student financial aid data, except the budget item information. Data includes Aid Record, Need Analysis Form, Student Financial Aid, or Financial Aid Need.

You can select each report to include the following data:

- All changes made to all students by all individuals who are making revisions
- Only those changes made to all students by one individual who is making revisions
- All changes made to one student by all individuals who are making revisions
- All changes made to one student by one individual who is making revisions

Note: To better maintain your audit trail, Jenzabar recommends you assign each individual making changes a personal User ID rather than using a common User ID. By assigning personal User IDs, you will know the specific individuals making changes to students' information.

You can run each report process on a regular basis by using the Output Parameters and Scheduling window or automatically by using *cron*, a UNIX utility that runs other programs and executes the commands found according to time specifications.

Note: For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*. For more information about using cron, see the system manuals available for UNIX.

Before You Begin

Before you begin to use the following Financial Aid Audit reports, remember:

- An ID record for the student must already exist on the system
- The user ID number, date and time of change, and a complete copy of each record before and after the change is saved in an audit database

  Note: For more information about creating an audit database, contact your Jenzabar coordinator.

Reports for Financial Aid Audit

Audit Reports Summary

The following is a list of Financial Aid Audit reports available from the Financial Aid Audit Reports menu. This list includes the following information for each report:

- The title of the report
- The menu option you access to produce the report
- The technical name of the report
- The report parameters
- A brief description of the report

Audit Reports

The following reports relate to Financial Aid Audit. You can produce each of these reports from the Financial Aid: Audits menu:

Financial Aid Update Audit

Menu option: Transaction Audit History
Technical name: stuaudit
Parameters:
Beginning Date: Optional **-** The beginning date (mm/dd/yyyy).
Ending Date: Optional - The ending date (mm/dd/yyyy).
Description: Reports on the individuals who have updated financial aid records.
Special considerations: None

FA Transcript Aid Verification Report

Menu option: FA Trans Verification
Technical name: chktrans
Parameters: None
Description: Verifies that the Financial Aid table has been set up correctly to print the financial aid transcript.
Special considerations: None

Financial Aid Audit Reports

The following reports relate to Financial Aid Audit. You can produce each of these reports from the Financial Aid: Audit Reports menu:

Note: The Financial Aid Audit reports are only available if the fadata audit macro (ENABLE_FEAT_FADATA_AUDIT) is enabled.

Aid Record Audit Report

Menu option: Aid Record
Technical name: audaid
Parameters:
End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.
Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.
Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.
Update UID: The personal User ID number of the individual(s) who made changes.

Note: If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Aid record.

Need Analysis Form Record Audit Report

Menu option: Need Analysis Form
Technical name: audnaf
Parameters:

End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.
Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.
Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.
Update UID: The personal User ID number of the individual(s) who made changes.

Note: If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Need Analysis Form record. This report only includes those fields affecting the EFC.

Student Financial Aid Need Record Audit Report

Menu option: Student Financial Aid Need
Technical name: audfaneed
Parameters:

End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.
Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.
Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.
Update UID: The personal User ID number of the individual(s) who made changes.

Note: If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Financial Need record.

Student Financial Aid Record Audit Report

Menu option: Student Financial Aid
Technical name: audstufa
Parameters:

End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.
Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.
Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.
Update UID: The personal User ID number of the individual(s) who made changes.

Note: If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Student Financial Aid record.

Aid Reports

The following reports relate to Aid reports. You can produce each of these reports from the Reports: Aid Reports menu:

Financial Aid Offers For (Sess, Yr)

Menu option: Award Offers
Technical name: aidrpt
Parameters:
Year: Required - The school year (e.g., 9900 for 1999-2000) for which you wish to create the report.
First Session: Optional - The first Session code (e.g., FA for Fall) for which you wish to create the report.
Second Session: Optional - The second Session code (e.g., WI for Winter) for which you wish to create the report.
Third Session: Optional - The third Session code (e.g., SP for Spring) for which you wish to create the report.
Description: Lists all students and aid they have been offered for all sessions and their aid statuses.
Special considerations: None

Financial Aid Offers For (School Year) (By Code)

Menu option: Aid by Code
Technical name: aidcoderpt
Parameters:
Year: Required - The school year (e.g., 9899) for which you wish to report aid codes.
Beginning Aid Code: Optional - The beginning financial aid code (e.g., PERK for Perkins loan).
Ending Aid Code: Optional - The ending financial aid code (e.g., STAF for Subsidized Stafford loan).
First Session: Optional - The first session code (e.g., FA for Fall).
Second Session: Optional - The second session code (e.g., WI for Winter).
Third Session: Optional - The third session code (e.g., SP for Spring).
Description: Lists all students and aid they have been offered for all sessions.
Special considerations: None

Financial Aid Offers For (School Year) (Summary Version)

Menu option: Summary Aid by Code
Technical name: sumcoderpt
Parameters:
Year: Required - The school year (e.g., 9899) for which you wish to report aid codes.
First Session: Optional - The first session code (e.g., FA for Fall).
Second Session: Optional - The second session code (e.g., WI for Winter).
Third Session: Optional - The third session code (e.g., SP for Spring).
Description: Lists a summary of financial aid, sorted by aid code.
Special considerations: None

Campus Vs. Non-Campus Based Aid For (School Year)

Menu option: Aid by Funding Source
Technical name: aidcampus
Parameters:
Year: Required - The school year (e.g., 9899) for which you wish to report aid codes.
Method: Required - The code for the financial aid methodology (e.g., FM for Federal Methodology).
Need: Optional - A code indicating whether you wish to display the percentage (P) of the unmet need or the actual dollars (N) of the unmet need.
Need: Optional - Enter the beginning value for percentages on dollar needs.
Need: Optional - Enter the ending value for percentages on dollar needs.

Description: Lists all students and the aid they have been offered for all sessions sorted by Campus-Based vs. Non-Campus Based and within 1 of 3 categories:

- Jobs
- Grants
- Loans

Special considerations: None

Changes In Registration

Menu option: Changes In Registration
Technical name: regchg
Parameters:
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Subsession: Optional - The Subsession code (e.g., F1 for Fall Subsession One) for which you wish to create the report.
Academic Year: Optional - The school year (yyyy) for which you wish to create the report.
Program: Optional - The Program code (e.g., UNDG for undergraduate) for which you wish to create the report.
Subprogram: Optional - The Subprogram code (e.g., CAMP for Main Campus) for which you wish to create the report.
Status: Optional - The Student Academic Status code for which you wish to create the report.
Beginning Date: Optional - The beginning date (mm/dd/yyyy) for which you wish to display changes in registration.
Ending Date: Optional - The ending date (mm/dd/yyyy) for which you wish to display changes in registration.
Description: Lists registration changes as of a specific date.
Special considerations: None

Financial Aid Offers To No Shows For (Sess, Yr)

Menu option: Aid For No-Shows
Technical name: aidnoshow
Parameters:
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Year: Required - The school year (yyyy) for which you wish to create the report.
Description: Lists aid awarded to no-show students.
Special considerations: None

Financial Aid Offers To Part-time Students

Menu option: Aid For Part-time Students
Technical name: parttime
Parameters:
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Academic Year: Optional - The school year (yyyy) for which you wish to create the report.
Hours: Optional - The total amount of hours used to consider a student as attending your institution parttime.
Description: Lists students who are part-time and receiving aid.
Special considerations: None

Financial Aid Student Bridge Course Report

Menu option: Bridge Enrollment
Technical name: fabridge
Parameters:
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Academic Year: Optional - The school year (yyyy) for which you wish to create the report.
Program: Optional - The Program code (e.g., UNDG for undergraduate) for which you wish to create the report.
Subprogram: Optional - The Subprogram code (e.g., CAMP for Main Campus) for which you wish to create the report.
Status: Optional - The Student Academic Status code for which you wish to create the report.
Description: Prints a biographical form for the id_no specified.
Special considerations: None

Charges Paid For By Financial Aid
Menu option: Charges Paid By Aid
Technical name: aidchg
Parameters:
Balance Period: Required - The Balance Period code (e.g., FA98 for Fall 1998) for which you wish to create the report.
Amount Type: Optional - The Amount Type code (e.g., A for amounts paid) for which you wish to create the report.
Description: Lists the aid amounts that pay for specified charges.
Special considerations: None

Financial Aid Enrollment Verification
Menu option: Enrollment Variance
Technical name: enrvar
Parameters:
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Academic Year: Optional - The year (yyyy) for which you wish to create the report.
Subsidiary: Optional - The Subsidiary code (e.g., A/P for Accounts Payable) for which you wish to create the report.
Balance Period: Required - The Balance Period code (e.g., FA98 for Fall 1998) for which you wish to create the report.
Program: Optional - The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.
Number: Required - The minimum number of hours (e.g., 12) your institution requires for full-time enrollment.
Number: Optional - The number of hours your institution requires for three-quarter-time enrollment.
Number: Optional - The number of hours your institution requires for half-time enrollment.
Description: Lists the aid amounts that pay for specified enrollments.
Special considerations: None

Financial Aid Compliance Audit Report
Menu option: Compliance Audit
Technical name: fae.lypso
Parameters:
Year: Required - The Financial Aid Award Year code (e.g., 9899 for 1998-1999) for which you wish to create the report.
Session: Optional - The Session code(s) (e.g., FA98 for Fall, 1998) for which you wish to create the report. You can enter up to four Session codes.

Program: Optional - The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.
Output: Required - The Printer code for the printer you wish to use to print the report.
Report Type: Required - The Compliance Report Type code (e.g., A for Award) for which you wish to create the report.

Description: This is a background report that audits student financial aid compliance and lists students and their financial aid where compliance is not met.
Special considerations: None

Financial Aid History (By Year)

Menu option: Aid History By Year
Technical name: fahist
Parameters:
ID#: Optional - The ID number of the student for which you wish to create the report.
Description: Lists a financial aid history per fiscal year showing the yearly totals of the awarded and disbursed amounts (act and enc) for an individual student. The report's purpose is to quickly get a history of financial aid on the system for filling out a financial aid transcript.
Special considerations: None

Summary Of Financial Aid

Menu option: Aid History By Code
Technical name: fahistsum
Parameters:
ID#: Optional - The ID number of the student for which you wish to create the report.
Description: Summarizes each financial aid awarded to a student with the disbursed amounts.
Special considerations: None

SAP Listing

Menu option: SAP Listing

Note: You can also access the SAP Listing report from the Student Processing: SAP Processing menu.

Technical name: saplist
Parameters:
Session: Required - The Session code (e.g., FA for Fall) for which you wish to create the report.
Year: Required - The year (yyyy) for which you wish to create the report.
Program: Optional - The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.
SAP Track: Optional - The SAP Track code (e.g., FINAID for financial aid track) for which you wish to create the report.
SAP Code: Optional - The SAP Status code (e.g., APPL for SAP appeal status) for which you wish to create the report.
Beginning Date: Optional - The beginning date (mm/dd/yyyy) for which you wish to create the report.
Ending Date: Optional - The ending date (mm/dd/yyyy) for which you wish to create the report.
Beginning ID#: Optional - The beginning ID number of the students for which you wish to create the report.
Ending ID#: Optional - The ending ID number of the students for which you wish to create the report.

Description: Lists students with a specified SAP status.
Special considerations: None

Aid Transaction Reports

The following reports relate to Aid Transaction reports. You can produce each of these reports from the Reports: Aid Transaction Reports menu:

Disbursed Amounts Per Student

Menu option: Amounts Paid By Student
Technical name: stufatot
Parameters:
Balance Period: Required - The Balance Period code (e.g., FA98 for Fall 1998) for which you wish to create the report.
Description: Lists all students who have received a specified Financial Aid for a specified period.
Special considerations: None

Transactions Per Student

Menu option: Transactions/Amounts Paid
Technical name: stufatottr
Parameters:
Balance Period: Required - The Balance Period code (e.g., FA98 for Fall 1998) for which you wish to create the report.
Description: Lists all transactions for each student who has received Financial Aid for a specified period.
Special considerations: None

Disbursed Amounts Per Financial Aid Code

Menu option: Amounts Paid By Code
Technical name: codfatot
Parameters:
Balance Period: Required - The Balance Period code (e.g., FA98 for Fall 1998) for which you wish to create the report.
Beginning Aid Code: Optional - the beginning Financial Aid code (e.g., PELL for Pell grant) for which you wish to create the report.
Ending Aid Code: Optional - the ending Financial Aid code (e.g., STAF for Subsidized Stafford Loan) for which you wish to create the report.
Post Code A: Optional - Enter 'A' to include Financial Aid Post codes on the report.
Post Code L: Optional - Enter 'L' to include Loan Post codes on the report.
Post Code Y: Optional - Enter 'Y' to include the Cash/Refunds Post codes on the report.
Post Code N: Optional - Enter 'N' to include the N Post codes on the report.
Description: Lists all students who have received a certain Financial Aid for a certain period.
Special considerations: None

Transactions Per Financial Aid Code

Menu option: Transactions/Paid By Code
Technical name: codfatottr
Parameters:
Balance Period: Required - The Balance Period code (e.g., FA98 for Fall 1998) for which you wish to create the report.
Beginning Aid Code: Optional - the beginning Financial Aid code (e.g., PELL for Pell grant) for which you wish to create the report.
Ending Aid Code: Optional - the ending Financial Aid code (e.g., STAF for Subsidized Stafford Loan) for which you wish to create the report.
Post Code A: Optional - Enter 'A' to include Financial Aid Post codes on the report.
Post Code L: Optional - Enter 'L' to include Loan Post codes on the report.
Post Code Y: Optional - Enter 'Y' to include the Cash/Refunds Post codes on the report.

Post Code N: Optional - Enter 'N' to include the N Post codes on the report.
Description: Lists all transactions for each student who has received Financial Aid for a certain period.
Special considerations: None

Students Owing Refund For Financial Aid
Menu option: Students Owing Refund
Technical name: aidrfnd
Parameters:
Subsidiary: Optional - The Subsidiary code (e.g., S/A for Student Accounts) for which you wish to create the report.
Balance Period: Required - The Balance Period code (e.g., FA98 for Fall 1998) for which you wish to create the report.
Description: Lists the aid amounts that pay for specified refunds.
Special considerations: None

Journal By Entry
Menu option: G/L Journal Reports
Technical name: jrnlent
Parameters:
Beginning Journal Number: Optional - Enter the journal number corresponding the reference code.
Ending Journal Number: Optional - Enter the journal number corresponding the reference code.
Output: Required - The Printer code for the printer you wish to use to print the report.
Description: Lists a specified journal with related entries and transactions.
Special considerations: None

Journal By Subsidiary Entry
Menu option: S/L Journal Reports
Technical name: jrnlslent
Parameters:
Beginning Journal Number: Optional - Enter the journal number corresponding the reference code.
Ending Journal Number: Optional - Enter the journal number corresponding the reference code.
Output: Required - The Printer code for the printer you wish to use to print the report.
Description: Lists subsidiary transactions by journal.
Special considerations: None

College Work Study Reports

The following reports relate to College Work Study reports. You can produce each of these reports from the Reports: College Work Study Program menu:

Student Payrolls/Student Ledger
Menu option: Student Payroll/Ledger
Technical name: prstuldgr
Parameters:
Beginning Date: Optional - The beginning date (mm/dd/yyyy) for which you wish to create the report.
Ending Date: Optional - The ending date (mm/dd/yyyy) for which you wish to create the report.
Fiscal Year: Required - The fiscal year (e.g., 9899 for 1998-1999) for which you wish to create the report.
College Work Study Aid Code: Optional - Enter the College Work Study Aid Code.
Institution Work Study Aid Code: Optional - Enter the Institution Work Study Aid Code.

Description: Prints a Student Payroll Ledger sorted by student.
Special considerations: Report requires wide paper.

Summary of Student Payrolls

Menu option: Student Payrolls - Summary
Technical name: sumstupr
Parameters:

Beginning Date: Optional - The beginning date (mm/dd/yyyy) for which you wish to create the report.
Ending Date: Optional - The ending date (mm/dd/yyyy) for which you wish to create the report.

Description: Prints a Summary of Student Payrolls. The report uses the payroll codes of CWSP and INST.
Special considerations: None

Student Work Study Aid Report

Menu option: Student Work Study Aid
Technical name: wsneedrpt
Parameters:

Subsidiary: Optional - The Subsidiary code (e.g., A/P for Accounts Payable) for which you wish to create the report.
Fiscal Year: Required - The fiscal year (e.g., 9899 for 1998-1999) for which you wish to create the report.
College Work Study Aid Code: Optional - Enter the College Work Study Aid Code.
Institution Work Study Aid Code: Optional - Enter the Institution Work Study Aid Code.
Amount: Optional - Enter the amount awarded.

Description: Prints a Student Work Study Need report. The report prints Total Aid without Work Study plus the Actual Amount Paid for Work Study and only lists students who have been paid aid.
Special considerations: None

Using FISAP Reports

Introduction

You can use the FISAP reporting options in CX to gather the necessary data for the Department of Education's annual Fiscal Operations Report and Application to Participate form. The information for the FISAP reports comes primarily from existing data in CX, provided the Financial Aid application has been implemented and the need analysis data has been entered (e.g., the parents' and student's income). The disbursed amounts for the Title IV aid come directly from the Student Accounts (S/A) subsidiary records for all students during the award year. Other information must be entered and validated manually before the FISAP reports can be finalized. This data consists of various flags along with verified data values in the system to note whether or not the students meet the FISAP reporting requirements.

Before You Begin

Before you can begin using the FISAP reporting options, you must complete the following tasks:

1. Verify the posted financial aid data in the system.
2. Set the FISAP flags and values.
3. Create FISAP records.

   Note: When you create FISAP records, the system automatically updates students' total incomes. However, if you get an error message when you create FISAP records, you will need to recalculate these. You can do this following the procedure *Updating Students' Total Income* in this section.

4. Verify FISAP data.

Verifying the Posted Financial Aid Data

The first task you must complete before using the FISAP reports is to verify the posted financial aid data. Follow these steps to create the Student Financial Aid Audit report which you use to verify the data.

1. From the Student Management: Financial Aid Main menu, select the menu option Audits. The Financial Aid: Audit menu appears.
2. Select the menu option Audit - With Update. The Audit - With Update screen appears.

   Note: This option may be password protected. Contact your Jenzabar coordinator if you need help accessing this option.

3. Enter the financial aid award year and the financial packaging method code and select **Finish**. The Output Parameters and Scheduling window appears.
4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: Audit menu reappears.

   Note: For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.

5. After you create the Student Financial Aid Audit report, resolve any errors from the audit. However, because you ran the Audit - With Update menu option, the system generally updates any error conditions found. For more information about running and interpreting this report, see the section *Financial Aid Auditing* in the *Financial Aid Technical Manual*.

Setting the FISAP Flags and Values

The second task you must complete is setting the FISAP flags and values. To save time and data entry, you can run the Default Initial Values process from the Reports: FISAP Reports menu. This process asks for the minimum hours required for at least full-time status during the year and up to three sessions to check for attendance. If a student was confirmed in any of the sessions passed, the system will set the In Attendance flag to **Y**.

CAUTION: Each time you run this process, it resets all FISAP flags to the default data values. Consequently, you should not run this process after you manually enter FISAP data.

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP Reports menu appears.
3. Select the menu option Default Initial Values. The Default Initial Values screen appears.

   Note: This process will prepare the FISAP data by updating the applicants' financial aid record with default values based on the existing data. You should only run this process once. Running it more often will overwrite updated information.

4. Update the default values in the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
5. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Reports: FISAP Reports menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system runs the process for the parameters you specified. After the system completes the process, it sends you e-mail informing you if it completed successfully.

Creating FISAP Records

The third task you must complete is creating FISAP records (fisap_rec). To do this, run the Create FISAP Records process from the Reports: FISAP Reports menu. The system creates FISAP records using information from the Subsidiary Total records for all students with financial aid posted for the following programs: Perkins Loan, the Supplemental Educational Opportunity Grant, and the Federal Work Study Program.

The FISAP record contains a program code that should be the same value as the program code in the student's Student Financial Aid record (stufa_rec). If it is not, or if the student has a blank program code in the FISAP record, access the FISAP Data Entry menu option from the Reports: FISAP Reports menu to update or add a FISAP program code.

CAUTION: If you run this process more than once, the system replaces existing FISAP records with new ones for all eligible students or for the specified ID numbers. Consequently, you should not run this process after you manually enter FISAP data.

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP Reports menu appears.
3. Select the menu option Create FISAP Records. The Create FISAP Records screen appears.

4. Update the default values in the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
5. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Reports: FISAP Reports menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system runs the process for the parameters you specified. After the system completes the process, it sends you e-mail informing you if it completed successfully, including information about what the process did.

Updating Students’ Total Income

To produce a valid Fiscal Operations report, all applications on file must have been entered into the Need Analysis Form record (naf_rec). For more information, see the section *Entering Financial Aid Need Analysis Information* in the *Financial Aid Need Analysis User Guide*. The program then uses the appropriate income, dependency status, and zero EFC values to update the stufa_rec.tot_inc, stufa_rec.dep, and stufa_rec.zero_efc respectively.

When you create the FISAP records, the system updates students’ total income. However, if you get an error message when you create FISAP records, you will need to recalculate these following this procedure.

Note: During the calculation of the total income, the FISAP program may encounter a case where the need analysis is rejected. The student’s ID number and the reason why the need analysis was rejected will be printed.

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP menu appears.
3. Select the menu option Update Total Income. The Update Total Income screen appears.
4. Update the default values in the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
5. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Reports: FISAP Reports menu reappears.

   Note:
   - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
   - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system runs the process for the parameters you specified. After the system completes the process, it sends you e-mail informing you if it completed successfully.

Verifying FISAP Data

The last task you must complete is to set up a series of flags and data values in the FISAP Data Entry screen. The following conditions must be entered and validated for each student before his/her information will appear on FISAP reports:

- The Include in Report field must be set to Y, if the student is to be included in the FISAP report.
- The Program fields must contain either a valid undergraduate or graduate code.

- The Dependent field must be set to either D for dependent or I for independent.
- The Need Entered field must be set to Y, if a valid need analysis of the student has been done.
- The In Attendance field must be set to Y, if the student was not only enrolled in a program but also attended classes during the year.
- The Fulltime field must be set to Y, if the student attended full-time or more during the year. This field must be set to N, if the student attended less than full-time.
- The Home Site field determines which site a student will be grouped with for reporting purposes. This field must be set to NONE, if the student does not have a home site.

> **Note:** Site records are generally used by institutions with more than one campus.

If necessary, you can manually update these fields using the following procedure:

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP Reports menu appears.
3. Select the menu option FISAP Data Entry.
4. Select **Finish**. The FISAP Data Entry screen appears.
5. Select **Query** to find the first student whose information you want to verify. After entering some search criteria (e.g., an ID number in the ID No field or social security number in the SS No field), press the **<Esc>** key. The system searches the database for any records that match the specified criteria, and if at least one is found, the student's information appears in the fields.

   > **Note:**
   > - The number of records, or rows, found that match the specified criteria appears in the lower left corner of the screen; for example, "1 row(s) found." If more than one was found, use the **Next** and/or **Previous** commands to move to each record.
   > - If no records are found, the message "There are no rows satisfying the conditions" appears.

6. Are the fields set to the correct values as defined above?
   - If yes, go to step 10.
   - If no, select the **Detail** command to access the record in which the field(s) you need to update appear. Go to step 7.

   > **Note:** The screen includes information from the ID record (id_rec), the Student Financial Aid record (stufa_rec), the FISAP record (fisap_rec), and the Program Enrollment record (prog_enr_rec). The fields that you might need to update can be in any of these records. You access each record using the **Detail** command; each time you select the command, the record that you have access to changes. The name of the record you are currently accessing appears in the upper right corner of the screen, below the ring menu (e.g., ** 1: id_rec table**).

7. Select **Update**. The cursor moves to the first field in the record that you can update. Update the appropriate field(s). If necessary, press the **<Enter>** or **<Tab>** key to move to the next field.

   > **Note:** The student may have more than one Student Financial Aid record (stufa_rec) depending on the award year. This information appears in the Award Year field on the Student Financial Aid Information segment of the screen. Use the **Next** and/or **Previous** commands to ensure you are updating the correct award year.

8. Press the **<Esc>** key to accept the changes.
9. Do you need to update additional fields in another record (e.g., the Program fields in either

the FISAP record or in the Program Enrollment record)?

- If yes, go to step 6.
- If no, go to step 10.

10. Do you need to verify another student's information?
    - If yes, go to step 5.
    - If no, select **Exit**, then press **<Enter>**. The Reports: FISAP Reports menu reappears.

Summary of FISAP Reports

The following is a list of FISAP reports available from the Reports: FISAP Reports menu. Each report only displays records for sites that are the same as the operator's or that have a site of NONE or blank. This list includes the following information for each report:

- The title of the report
- The menu option you access to produce the report
- The technical name of the report
- The report parameters
- A brief description of the report

Note: You can run each report process on a regular basis by using the Output Parameters and Scheduling window. For information, see the *Getting Started User Guide*.

Students Without Income or Need Amounts Report

Menu option: No Need/No Income
Technical name: noneedinc
Parameters:
Year: Required **-** A code indicating the financial aid award year the report should use to create the list of students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.
Description: Creates a list of students with zero income in either the Parent or Student Income fields as well as students who have a financial need of zero, or less than zero.

Students Not in Attendance With Need Records

Menu option: Students Not Attending
Technical name: noattend
Parameters:
Year: Required **-** A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.
First Session: Optional - a code indicating the first session to exclude from the report (e.g., FA for fall). Use **Table Lookup** for a list of valid codes.
Academic Year: Optional - the calendar year of the first session to exclude from the report (e.g., 1998). Use **Table Lookup** for a list of valid options.
Second Session: Optional - a code indicating the second session to exclude from the report (e.g., SP for spring). use **Table Lookup** for a list of valid codes.
Academic Year: Optional **-** the calendar year of the second session to exclude from the report (e.g., 1998). Use **Table Lookup** for a list of valid options.
Third Session: Optional - a code indicating the third session to exclude from the report (e.g., SU for Summer session). use **Table Lookup** for a list of valid codes.
Academic Year: Optional **-** the calendar year of the third session to exclude from the report (e.g., 1998). Use **Table Lookup** for a list of valid options.
Description: Creates a list of students who were not in attendance or not confirmed in any of the sessions entered as parameters during the reporting year. You can use this report to set the FISAP In Attendance flag value. The report will list all previously attended sessions for each student selected.

FISAP Data Audit Report

Creates a list of students who are missing at least one of the required FISAP record fields or FISAP required data for all students.
Menu option: FISAP Data Audit
Technical name: fisapau
Parameters:

Year: Required - A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.
Students: Required - A code indicating whether to print only students with missing data (N) or to print all students.

Description: Creates a list of students who are missing at least one of the required FISAP record fields or FISAP required data for all students.

Dependent Eligible Aid Applicants for Award Year 9*X*9*Y* Report
Menu option: Dep. Eligible for Aid
Technical name: eligdep
Parameters:

Year: Required - A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a list of dependent students in each program who are eligible for aid.

Independent Eligible Aid Applicants for Award Year 9*X*9*Y*
Menu option: Indep. Eligible for Aid
Technical name: eligindep
Parameters:

Year: Required - A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a list of independent students in each program who are eligible for aid.

Test for FISAP Eligible Aid Report: Award Year 9*X*9*Y*
Menu option: Eligible for Aid - Detail
Technical name: testelig
Parameters:

Year: Required - A code indicating the financial aid award year the report should use to create the list of students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a detailed list of students who appear on the Dependent Eligible Aid Applicants for Award year 9*X*9*Y* and/or the Independent Eligible Aid Applicants for Award Year 9*X*9*Y*. You can use this list to cross-reference the other two.

Fiscal Operations Report for 9*X*9*Y*
Menu option: FISAP Report Grid
Technical name: fisaptot
Parameters:

Year: Required - A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a grid showing the amounts disbursed for each aid type required with breakdowns for income and program. The report includes students who meet the following conditions:

- Have a Student Financial Aid record for the reporting year
- Have the Need Entered and the In Attendance flags set to Y
- Have the Dependent flag set to D for dependent or I for independent

Test for FISAP Reports: Award Year 9*X*9*Y*

Menu option: FISAP Report - Detail
Technical name: testtot
Parameters:
Year: Required - A code indicating the financial aid award year the report should use to create the list of students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.
Description: Creates a detailed list of students who appear on the Fiscal Operations Report for 9*X*9*Y*. The list shows the students' incomes and aid totals. You can use this list to cross-reference the other.

Fiscal Operations Audit Report for 9*X*9*Y*
Menu option: Missing Data Audit
Technical name: totaudit
Parameters:
Year: Required - A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 9798 for the 1997 to 1998 school year). Use **Table Lookup** for a list of valid options.
Description: Creates a list of students who are not included in the FISAP report. This report lists any students with missing records or FISAP flag values that keep the student from being included in the FISAP report.

Refundable Aid Reports

The following reports relate to Refundable Aid reports. You can produce each of these reports from the Refundable Aid: Reports menu.

Student Financial Aid Need Record Audit Report
Menu option: Enrollment Variance-Fund
Technical name: enraid
Parameters:
Site: Optional - The Site code (e.g., MAIN for main campus)
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Year: Optional - The school year (e.g., 9899) for which you wish to create the report.
Subsession: Optional - The first Subsession code (e.g., F1 for Fall Subsession One) for which you wish to create the report.
Subsession: Optional - The second Subsession code (e.g., F2 for Fall Subsession Two) for which you wish to create the report.
Program: Optional - Enter the Program code (e.g., UNDG for undergraduate) for which you wish to create the report.
Minimum Hours: Optional - Enter the minimum number of enrolled hours to list this student on the report.
Maximum Hours: Optional - Enter the maximum number of enrolled hours to list this student on the report.
Financial Aid Code: Optional - Enter the first Financial Aid Code (e.g., PELL for PELL awards).
Financial Aid Code: Optional - Enter the second Financial Aid Code (e.g., STAF for Subsidized Stafford Loan)
Financial Aid Code: Optional - Enter the third Financial Aid Code (e.g., SEOG for Supplemental Education Opportunity Grant)
Description: Prints enrollment verification lists for students.
Special considerations: None

Refund Eligible-Fund

Menu option: Refund Eligible-Fund
Technical name: rfnd.aid
Parameters:
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Percent: Optional - Enter the disbursement percentage.
Tickler: Optional - Enter the Tickler code.
Contact Resource: Optional - Enter the Contact Resource code.
Description: Produces a proof list of students with a refund due to be processed in the next check run.
Special considerations: None

Expected Refund Proof List
Menu option: Refund Eligible-Student
Technical name: rfnd.id
Parameters:
Session: Optional - The Session code (e.g., FA for Fall) for which you wish to create the report.
Percent: Optional - Enter the disbursement percentage.
Tickler: Optional - Enter the Tickler code.
Contact Resource: Optional - Enter the Contact Resource code.
Description: Reports eligible, refundable aid checks for the Tickler and Resource codes that you specify in ID number order.
Special considerations: None

Refund Check-Fund
Menu option: Refund Check-Fund
Technical name: sturfndaid
Parameters:
Subsidiary: Required - Enter the Subsidiary code (e.g., S/R Student Refunds) that you wish to use to run the report.
Balance Period: Required - Enter the Balance Period code (e.g., FA99 for Fall 1999) to be considered for the report.
Date: Required - Enter the date (mm/dd/yyyy) you wish to run the checks.
Description: Produces a check register report of refund checks for financial aid, sorted by type of aid.
Special considerations: None

Refund Checks To Be Disbursed
Menu option: Refund Check-Student
Technical name: sturfnd.id
Parameters:
Subsidiary: Required - Enter the Subsidiary code (e.g., S/R Student Refunds) that you wish to use to run the report.
Balance Period: Required - Enter the Balance Period code (e.g., FA99 for Fall 1999) to be considered for the report.
Date: Required - Enter the date (mm/dd/yyyy) you wish to run the checks.
Description: Produces a check register report of refund checks for financial aid, sorted by type of aid.
Special considerations: None

SECTION 11 - RESPONDING TO SYSTEM MESSAGES

Overview

Introduction

This section provides the following information:

- Descriptions of the status, warning, field error, and fatal error messages that can appear while you are using Financial Aid Entry
- Information you need to respond to the status, warning, and error messages

Four Types of Messages

Four types of messages can appear in Financial Aid Entry. The messages appear on the comment line, on the error line, in a dialog box, or in your e-mail. The types of messages are:

- Status message
- Field error message
- Warning message
- Fatal error message

Descriptions of Message Types

This list describes each of the four types of messages by degree of severity.

Status

Assures you that the program is working properly when you select an option involving a long pause.

- Can appear after you select a command or option, type data, or press a key
- Appears on the comment line
- Requires no action by you

Example: "Opening files ..."

Field error

Tells you of an invalid field value entered, and provides valid field values from which to choose.

- Can appear after you enter an invalid code in a field
- Appears on the error line
- Requires you to select a valid code from those provided in the field error message, a table lookup, or a query, and enter it into the field

Example: “Valid values: (A, I)”

Warning

Informs you of a condition of which you must be aware in order to continue.

- Can appear after you select a command or option, type data, or press a key to begin or end a process that requires a decision
- Appears in a dialog box
- Requires you to act or make a decision
- Instructional; does not terminate processing

Example: “Are you sure you want to exit? (Y/N)”

Fatal error

Informs you of a serious problem occurring within the system.

- Can appear when the system is missing information (such as a required table or record) needed to continue processing, or when there is a program error
- Appears in a dialog box, or in your e-mail, and/or in your Jenzabar coordinator's e-mail

- Requires you to contact the Jenzabar coordinator immediately to resolve the problem
- Terminates processing

Example: "XXXX An unrecoverable error has occurred. Contact your Jenzabar coordinator."

E-mail Messages

Occasionally, CX programs send status or error messages to your e-mail, as well as to the comment or error line. Programs do not send messages about background processes to the comment or error line, but only to your e-mail. Such messages tell you any of the following information:

A process was completed successfully
When you see this message, you can delete or save them according to your preferences or established policy.

Errors have occurred while trying to complete a process
When you see this message, tell your Jenzabar coordinator about the message to resolve the problem.

Information cannot be found
When you see this message, try the process again with new field values.

Warning and Error Messages

Messages You Might Receive

The following list contains examples of some of the field error, warning, and fatal error messages that can appear when you use Financial Aid Entry.

Warning messages do not affect program processing, while field error messages indicate problems you can correct by following the directions in the message. However, fatal error messages stop the processing of a program; if you receive a fatal error, contact your Jenzabar coordinator immediately.

#XX. Contact YY must be added manually
The contact code 'YY' cannot be added for student 'XX.' The contact must be added through Contact entry.

#XX: ID record not found: award notice not printed
This message occurs when printing award notification forms based on Contact records. Student ID 'XX' has no identification record in the database. Leave the contact status as "E" (expected). Verify that the ID number given in 'XX' is a valid ID number.

#XX: Invalid aid subsidiary ID number (SS): ID record not found
The ID number 'SS' does not exist in the student's identification record in the database. You cannot add an invalid ID number.

%ld: Not eligible for Pell award: Cost=%d, Schd=%c
The student's need amount does not fall into the range of eligibility for a Pell award. Cost equals the budget amount. Schd equals students' assumed schedule (e.g., full-term, half-term, etc.).

Aid code '%s' has the disbursed flag set to 'Y' but does not have a corresponding Subsidiary Total Table entry needed for posting information.
The Aid code is defined in the Aid Code table as an aid that can be disbursed to the Student Accounts, but the After Adding Aid Codes process has not been run. Run the process from the Table Maintenance menu.

"Cannot start the Need Analysis program"
Try the Need command again. If you continue receiving the error, write down any other errors that appear with this message, and see your Jenzabar coordinator.

Could not get need information back from the Need Analysis program
Write down the error, and any others that appear with it, and see your Jenzabar coordinator.

Could not get status back from the Need Analysis program
Write down any errors that appear with this message, and see your Jenzabar coordinator.

Could not get information back from the Need Analysis program
Write down any errors that appear with this message, and see your Jenzabar coordinator.

Criteria 'XX' for file 'YY' must have a session and year specified
The Compliance tables need to be updated.

Criteria code 'XX' not found for requirement 'YY', sequence 'ZZ'
The Compliance tables need to be updated.

Document reference 'XX' not found in the Document Table
See your Jenzabar coordinator.

Error in locating award forms: XX

The system cannot locate a valid award notification form. Write down this error, and see your Jenzabar coordinator.

Expected contacts not found for form 'XX', tick 'YY', due 'ZZ'

You are printing award notifications in batch mode, and the system cannot locate the correct Contact records. See your Jenzabar coordinator.

FATAL error occurred in the Need Analysis program. Check your mail.

Exit Financial Aid Entry, and check your mail to identify why you received this fatal error. You may need to call your Jenzabar coordinator.

Highlighted aid code(s) cannot be updated in the current academic year

The aid codes that appear on the Financial Aid Entry screen have been added for a different financial aid year than the one you specified on the Financial Aid Entry Program Parameters screen. Go to this screen and correct the year.

Invalid Aid Code

You have entered an invalid Aid code. Enter a valid code and continue.

Invalid Option

You have selected a command that is not valid. Re-make your selection and continue.

Invalid academic program code: %

You have entered an academic program code on a Financial Aid Entry screen. If using interactive mode, enter the correct code. If you are printing award notifications or posting, you must call your Jenzabar coordinator to help you restart Financial Aid Entry.

Invalid award form: 'XX'

See your Jenzabar coordinator.

Invalid relational operator 'XX' in compliance criteria table for 'YY'

The Compliance tables need to be updated.

Invalid session and year value: XX

You entered a session and year that is not defined in the Fiscal Calendar record. See your Jenzabar coordinator.

Min. State Grant Table is not set up for award year '%s', acyr

If your institution is not a Minnesota institution, the DO_MN_ST_GRANT include needs to be undefined in the /include/custom/finaid file. Contact your Jenzabar coordinator.

"Operator site differs from student's site" plus any of the following:

- Cannot access text
- Cannot output form
- Cannot output transcript
- Cannot schedule output
- No add allowed
- No delete allowed
- No packaging allowed
- No update allowed

The Jenzabar CX SITE variable for the user or the student may need to be updated. Contact your Jenzabar coordinator.

Program Enrollment record not found for this student.

This is for your information only. A Program Enrollment record is not required to award financial aid.

Warning: Student has been awarded aid in other %s sessions not displayed.

The Award Session(s) field on the Financial Aid Entry Program Parameters screen does not include all of the sessions for the award year. The student has been awarded aid in a session not entered in the Award Session(s) field.

INDEX

D

T

U

V

W