
Jenzabar CX

Financial Aid



JENZABAR

Technical Manual

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JENZABAR, INC.
FINANCIAL AID TECHNICAL MANUAL

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SECTION 1 - USING THIS MANUAL

Overview

Purpose of This Manual

This manual provides technical information required to implement, support, and maintain the Financial Aid product of CX .

Intended Audience

This manual is for use by those individuals responsible for the installation, customization, and maintenance of CX .

How to Use This Manual

If you are not familiar with the processes and features of the Financial Aid product, read the manual for:

- Detailed reference information about how the product works
- Procedures for customizing and maintaining the product

If you are familiar with the processes and features of the Financial Aid product, and just need specific reference information or a procedure, look through the Table of Contents or Index and refer to the pages you need.

Product Differences

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

Structure of This Manual

This manual contains both general reference information and procedures for installing and maintaining the Financial Aid product. The manual's organization follows:

Overview information:

- Section 1 - Information about using this manual
- Section 2 - Overview information about the product

Product reference information:

- Section 3 - Tables used in the product
- Section 4 - Macros, Includes, and Configuration Tables
- Section 5 - CX program files
- Section 6 - Financial Aid Entry
- Section 7 - Financial Aid Need Analysis
- Section 8 - Electronic Data Exchange
- Section 9 - Pell RFMS
- Section 10 - Financial Aid Loan
- Section 11 - Document Tracking
- Section 12 - Financial Aid Auditing
- Section 13 - Other Financial Aid Programs
- Section 14 - Menus, Screens, Scripts, and Reports

Product procedures:

- Section 15 - Procedures to install and customize your processes
- Section 16 - Procedures to maintain the product

Error reference/Recovery procedures:

Section 17 - A reference of errors and recovery procedures

Reference information:

Index

Related Documents and Help

The following resources are also available to assist you in implementing, supporting, maintaining and using the Financial Aid product.

Implementation/Technical Information:

Implementation Process Checksheet: Financial Aid
CX Implementation and Maintenance Technical Manual
CX System Reference Technical Manual

QuickMate online help:

QuickMate Installation Guide
Getting Started User Guide

Terminology

Master Glossary

UNIX-based help:

Help command in screens and menus

User guides:

Financial Aid User Guide
Financial Aid Electronic Data Exchange User Guide
Financial Aid Loan User Guide
Financial Aid Need Analysis User Guide
Financial Aid Packaging User Guide
Getting Started User Guide

Conventions Used in This Manual

Introduction

Jenzabar has established a set of conventions to help you use this manual. The list of conventions presented below is not exhaustive, but it includes the more frequently used styles and terms.

Style Conventions

CX technical manuals observe the following style conventions.

Boldface type

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

Bulleted list

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 designate a program name (e.g. *identry*)
- To cross-reference a section of text
- 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.

Quotation marks

Represent information written in this manual exactly as it appears on the screen (e.g., The message, "Now Running..." appears.).

Flowchart Conventions

Flowcharts representing a general overview of a particular application or process are included in this manual. Symbols are used in flowcharts as follows:



Process

Represents a processing function the system performs or the user must do.



Predefined Process

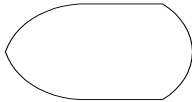
Represents a subroutine or module that can be called by an application; i.e., generally programming code.

Note: Used only for exception situations. The Process symbol is the standard symbol.



Terminator

Represents the very first or last symbol in a flowchart. Also used for references to another manual.



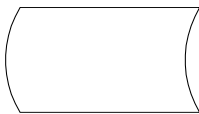
Display

Represents data displayed on a screen or window. Used for all menus including the master menu.



Document

Represents an output report, forms, or any readable data, either hardcopy or displayed on a screen.



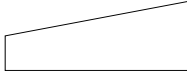
Stored data

Represents data maintained in the database including tables and records.



Manual operation

Represents any process performed manually by the user.



Manual input

Represents data entered by any manual method, such as data entry, scanning, or reading bar-codes.



Connector

Connects one section of the same flowchart to another. Usually, a connector contains a number where it exits a flowchart, and the same number in the connector showing re-entry.

Jenzabar-Specific Terms

The following list identifies term conventions used in this manual.

Application

One or more software programs that lets you perform a particular procedure, such as entering student information.

Data

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

Enter

To type information on a keyboard and execute by any 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 underlined (or highlighted) letter of a command on a 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 the <Enter> key
- Clicking with 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 - FINANCIAL AID PROCESSES

Overview

Introduction

This section provides information on the purpose and process flow of Financial Aid.

Purpose of Product

The primary purpose of Financial Aid is to enable an institution to:

- Establish and monitor financial aid eligibility
- Award and monitor financial aid
- Establish and monitor fund usage
- Produce needed reports

Background Knowledge

The following list describes the necessary background information that you should know to implement and support the Financial Aid product.

UNIX

Know the following about the UNIX operating system:

- Csh environment and commands
- Editor commands (e.g., vi)

INFORMIX-SQL

Know about the following INFORMIX tools:

- SQL database
- PERFORM screens
- ACE reports
- Scripts
- Stored procedures

Jenzabar CX database tools and utilities

Know how to use the following database tools:

- MAKE processor
- Schemas
- Macros
- Includes
- Program screens
- The SMO process

Jenzabar CX

Know the following about the CX standard product:

- CX directory structure
- The menu processor
- The CX database engine
- The product update process

QuickMate features

Know the following about the CX Graphical Server:

- Client/Server processing
- Telnet settings
- Keyboard settings
- Mouse settings

- GUI mode commands

C Programming

If you want to modify any CX programs to meet unique needs at your institution, you must know how to use the C programming language and have an in-depth knowledge of the CX code.

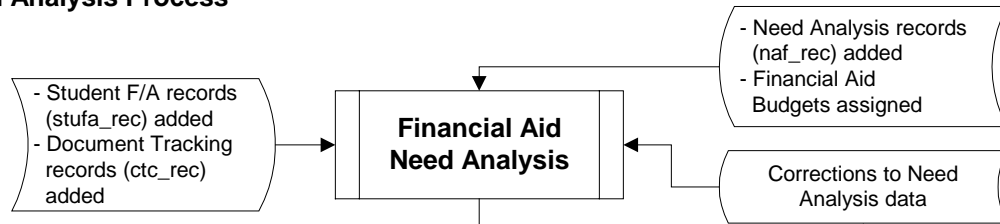
Process Flow

Diagram

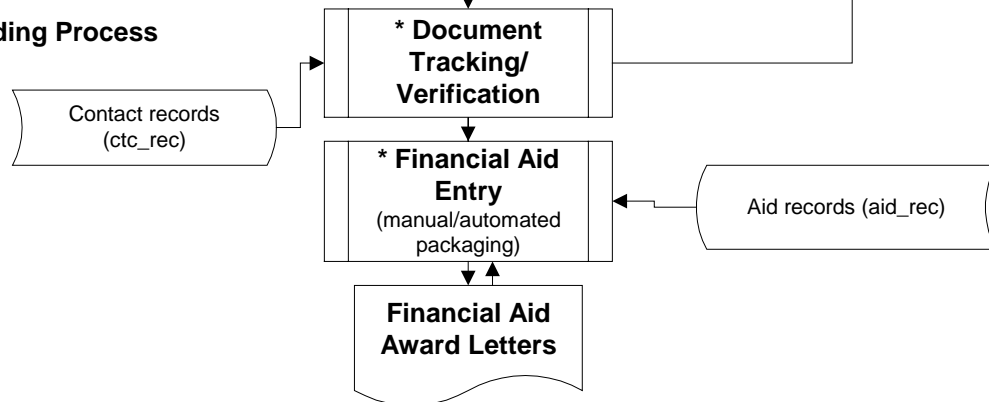
The following diagram shows the process flow of the Financial Aid product.

Note: For more information about program interrelationships and detailed data flow diagrams, see the program sections in this manual.

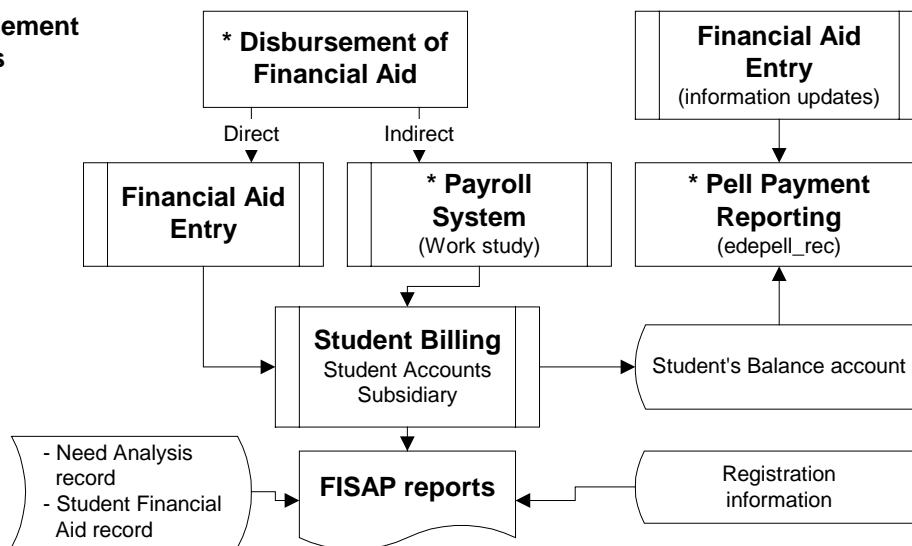
Need Analysis Process



Awarding Process



Disbursement Process



* Processes that are often used repeatedly during the year, outside the stated process flow.

Process Description

The financial aid process flow has three related processes that generally occur at various times throughout the calendar year:

- Need Analysis (usually occurs in the winter)
- Awarding (usually occurs in the spring)
- Disbursement (usually occurs each term)

The following lists the phases in the processes and is a general representation of an institution's financial aid processing.

1. The Financial Aid office uses the Need Analysis program to:
 - Add need analysis (naf_rec), National Student Loan Data System data (nslds_rec), and student data (stufa_rec) from need analysis forms and EDE processing
 - Create Contacts records (ctc_rec) for tracking the institution's contacts to students
 - Assign Financial Aid budgets to students
 - Add/monitor SAP processing results
2. The Financial Aid office uses the Document Tracking/Verification programs to:
 - Assist in performing verification procedures
 - Enter and schedule contacts (ctc_rec) with students
 - Produce letters and other forms of communication

Note: Steps in this phase can occur repeatedly during the year, outside the stated process flow.
3. The Financial Aid office uses the Financial Aid Entry (Financial Aid Packaging) program to perform manual or automated packaging of students' awards (aid_rec).

Note: Steps in this phase can occur repeatedly during the year, outside the stated process flow.
4. The Financial Aid office uses the Financial Aid Entry program to create:
 - Financial aid award letters
 - Financial Aid transcripts
5. The Financial Aid office authorizes disbursement financial aid to students. The Bursar or Business office disburses aid directly using the Financial Aid Entry program and indirectly when the aid is in the form of a Work-Study program.

Note: The Student Billing program utilizes aid posted to the student accounts subsidiary. Payroll processing handles work-study earnings. Steps in this phase can occur repeatedly during the year, outside the stated process flow.
6. The Financial Aid office creates FISAP reports based on information from the following sources:
 - Student Accounts Subsidiary (Student Billing)
 - Need Analysis information (naf_rec)
 - National Student Loan Data System (nslds_rec)
 - National Student Loan Data System Program Code record (nsldsprog_table)
 - Students' financial aid information (stufa_rec)
 - Registration information
7. The Financial Aid office creates Pell Payment reporting information from the following sources:
 - Financial Aid Entry information
 - Student's Account (Student Billing)
 - Financial Aid Need Analysis Information

Note: Steps in this phase can occur repeatedly during the year, outside the stated process flow.

Application Relationships

Related Jenzabar CX Applications

The Financial Aid product interacts with several other applications and products in CX. The following list describes the interrelationships.

Payroll/Personnel

The institution uses this product to set up and maintain students' work-study financial aid payroll processing.

Registration

Financial Aid uses registration information to:

- Produce FISAP reports
- Verify/adjust financial aid to enrollment level

Student Billing

This product uses posted financial aid information to create students' bills.

Student Affairs/Housing

Certain types of financial aid may depend upon a student's resident status. Such information appears in Housing records.

SECTION 3 - FINANCIAL AID TABLES AND RECORDS

Overview

Introduction

This section provides reference information about each table and record associated with the Financial Aid product. It also provides definitions of SQL and CX table and record terminology and differentiates among common, shared, and product-specific tables and records.

Alphabetical Organization

The tables and records appear in alphabetical order in this section.

What Is an SQL Table?

In a relational SQL database, a table is an organized set of any kind of data, regardless of its purpose for validation or information maintenance. The basic unit of organization of a table is a column, a category of data. A table can have multiple columns, and columns typically contain multiple rows of data.

The diagram shows a table with three columns: ID, Full Name, and Sess. The rows contain the following data:

	ID	Full Name	Sess
Rows	391569012	Browning, Allan T.	FA96
	345098754	Smith, Roxanne N.	FA96
	591320941	Dobrowski, George S.	FA96
	783490100	Jennings, Christina A.	SP97
	840917892	Brown, Garrett L.	FA96
	955712309	Cummings, Charles C.	SP97

What Is a Jenzabar CX Table?

CX makes name distinctions in the usage of database tables. A *table* in CX contains information that remains static and is denoted with the *_table* extension. For example, the State table, named *st_table*, contains the list of the United States of America. On the CX menu, you can access most tables from Table Maintenance menus.

What Is a Jenzabar CX Record?

CX makes name distinctions in the usage of database tables. A *record* in CX is a table that contains information that changes on a regular basis and is denoted with the *_rec* extension. For example, the Alternate Address record, named *aa_rec*, contains any other addresses at which students can be contacted, such as a summer address. You can access records in CX program screens, scroll screens, and PERFORM screens. SQL makes no distinction between tables and records; all sets of data are tables.

Summary List of Tables and Records Used

Introduction

Tables and records used in Financial Aid can be divided into the following categories:

- Common
- Shared
- Product-specific

Among these categories, some tables and records are required, while others are optional.

Impact of Changes to Tables and Records

If you make changes to schemas for any tables or records, you must reinstall each associated product or module.

Common Tables and Records

Modules in the Financial Aid product use several tables and records that are common throughout CX. These tables and records are:

- Contact record (ctc_rec)
- Contact table (ctc_table)
- Country table (ctry_table)
- ID record (id_rec)
- Profile record (profile_rec)
- Program table (prog_table)
- Site record (site_rec)
- State table (st_table)
- Tickler table (tick_table)
- Title table (title_table)

Note: For additional information about these common tables and records see the *CX System Reference Technical Manual* unless otherwise noted.

Shared Tables and Records

Some tables and records used in Financial Aid originate, or are more frequently used, within other CX product areas. These tables and records, and their originating product areas, are:

Notes:

- For additional information, see the technical manual for the primary product area. If multiple products are shown, the primary product is listed first.
 - If you make changes to schemas for the following records, you must reinstall each associated product.
- Academic Calendar record (acad_cal_rec)
 - Registration
 - Admission record (adm_rec)
 - Admissions
 - Student Services
 - Assessment table (assess_table)
 - Student Billing
 - Assignment Calculation record (assgncalc_rec)
 - Student Billing
 - Billing Fiscal Year table (fsbill_table)

- Student Billing
- Charge table (chg_table)
 - Student Billing
- Deferment Application table (defapp_table)
 - Student Billing
- Deferment table (defer_table)
 - Student Billing
- Degree table (degree_table)
 - Registration
- Education record (ed_rec)
 - Registration
 - Admissions
 - Student Services
- Fiscal Calendar record (fscl_cal_rec)
 - General Ledger and Reporting
- Personnel record (pers_rec)
 - Payroll/Personnel
- Position record (pos_rec)
 - Payroll/Personnel
- Position Funding table (posfnd_table)
 - Payroll/Personnel
- Payroll table (pr_table)
 - Payroll/Personnel
- Program Enrollment record (prog_enr_rec)
 - Admissions
 - Registration
 - Student Services
- Refund table (rfnd_table)
 - Student Billing
- School record (sch_rec)
 - Admissions
 - Registration
 - Student Services
- Student Academic record (stu_acad_rec)
 - Registration
 - Student Services
- Student Academic Sum record (acadsum_rec)
 - Admissions
- Student Statistics record (stu_stat_rec)
 - Registration
 - Student Services
- Student Total Status record (statsum_rec)
 - Registration
- Subsidiary Association table (subas_table)
 - General Ledger and Reporting
- Subsidiary Balances table (subb_table)
 - General Ledger and Reporting
- Subsidiary Total record (subt_rec)
 - General Ledger and Reporting
- Subsidiary Total table (subt_table)
 - General Ledger and Reporting
- Total Association table (totas_table)

– General Ledger and Reporting

Note: The Financial Aid Check Refunding process utilizes all of the above Financial tables. The Financial Aid *After Adding Aid Codes* SQL statement partially builds/modifies the Total Association, Subsidiary Association, and Subsidiary Total tables. The Business office must complete these tables by adding account numbers.

Financial Aid Tables and Records

Programs in the Financial Aid product use the following Financial Aid tables and records. File information about these tables and records is in this section.

- Aid Detail record (aiddtl_rec)
- Aid Form table (aid_form_table)
- Aid Packaging table (aidpkg_table)
- Aid record (aid_rec)
- Aid table (aid_table)
- Aid Transcript record (fatran_rec)
- Aid Type table (aid_type_table)
- Asset Protection table (apa_table)
- Available Taxable Income table (ati_table)
- Budget Group Association table (bgtgrpas_table)
- Budget Group table (bgtgrp_table)
- Business and Farm Net Worth table (busfarm_table)
- Compliance Association table (cplyas_table)
- Compliance Requirements table (cply_req_table)
- Compliance Sequence table (cply_seq_table)
- Compliance Criteria table (cply_crit_table)
- Criteria table (crit_table)
- Disbursements Status table (disbstat_table)
- Discretionary Net Worth table (dnw_table)
- Enrollment Schedule table (schdsess_table)
- Financial Aid Budget Detail record (fabgtdtl_rec)
- Financial Aid Budget Expense Association table (faexpas_table)
- Financial Aid Budget record (fabgt_rec)
- Financial Aid Budget table (fabgt_table)
- Financial Aid Detail table (aiddtl_table)
- Financial Aid Expense Item Association table (fabgtas_table)
- Financial Aid Expense Item table (fa_item_table)
- Financial Aid Method table (fameth_table)
- Financial Aid SAP Action table (fasapact_table)
- Financial Aid SAP Track table (saptrk_table)
- Financial Aid Schedule table (faschd_table)
- Financial Aid Session table (fasess_table)
- Financial Aid Tape Conversion record (natp_rec)
- Financial Aid Tax table (fatax_table)
- Financial Aid Transcript Loan record (faloan_rec)
- Financial Aid Verification table (faver_table)
- Financial Need record (faneed_rec)
- Financial SAP table (fasap_table)
- FISAP record (fisap_rec)
- Funding table (fndg_table)
- Grade Level table (gradlvl_table)
- Guarantor table (loanguar_table)
- Independent Student Allowance table (isa_table)

- Institutional Student Information Report (ISIR) record (esar_rec)
- Intermediate Calculations record (fana_rec)
- Lender table (lender_table)
- Loan Alternate record (loanalt_rec)
- Loan Amount Maximums table (loanmax_table)
- Loan Batch record (loanbatch_rec)
- Loan Change record (loanchg_rec)
- Loan Disbursement record (loandisb_rec)
- Loan Orig table (loanorig_table)
- Loan Period Disbursement Information table (loanprd_table)
- Loan record (loan_rec)
- Loan Stat table (loanstat_table)
- Loan Status record (loanstat_rec)
- Loan Student record (loanstu_rec)
- Loan Tracking Change table (loanchg_table)
- Loan Tracking Disbursement Information table (loandisb_table)
- Loan Tracking Format table (loanfmt_table)
- Loan Tracking Record table (loanrec_table)
- Loan Type table (loantype_table)
- National Student Loan Data System record (nslsds_rec)
- Need Analysis Form record (naf_rec)
- Package Method table (pkg_table)
- Package Objectives table (pkgobj_table)
- Packaging Parameter record (ppkg_rec)
- Pell RFMS record (edepell_rec)
- Pell RFMS table (edepell_table)
- SAP Criteria table (sapcrit_table)
- Schedule Session table (schdsess_table)
- Student Aid Report (SAR) Number table (sarno_table)
- Student Financial Aid BLOB (bstufa_blob)
- Student Financial Aid record (stufa_rec)
- Tax Allowance table (taxallow_table)

Required Tables and Records

The following records are required to run the features of the Financial Aid product. Each student must have entries in the following records:

- ID record (id_rec)
- Profile record (profile_rec)

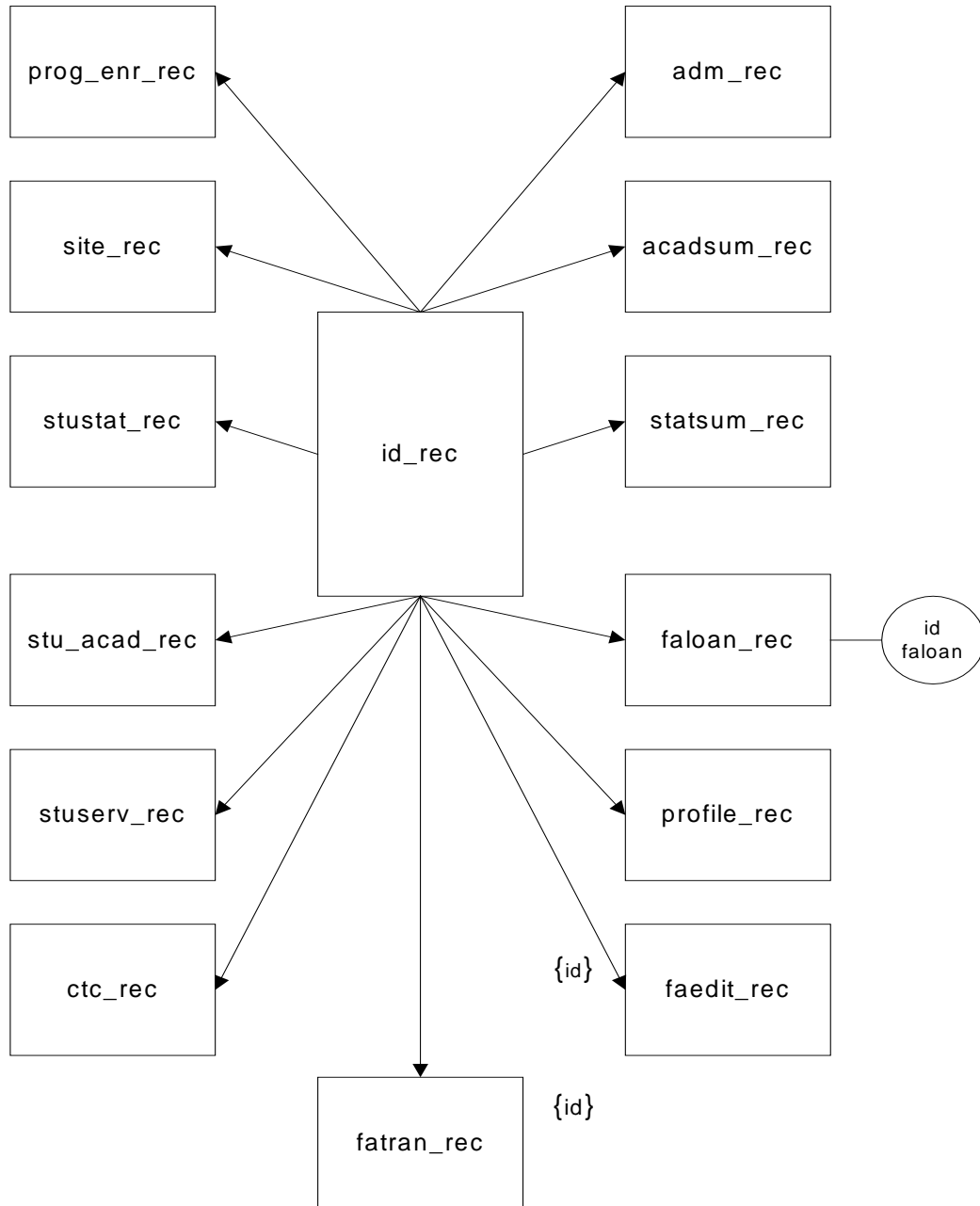
Table and Record Relationships

Entity Relationship Diagram (ID record)

The following diagram shows the relationship between the ID record (id_rec) and the records used by the Financial Aid product.

Entity Relationship Diagram (Student Financial Aid record)

The following diagram shows the relationship between the Student Financial Aid record (stufa_rec) and other records used by the Financial Aid product.



Financial Aid Schemas

Introduction

Schema files define database files and associated fields in the CX data dictionary. You can access schema files associated with the Financial Aid product in the following directory path:
\$CARSPATH/schema/student

File Naming Conventions

CX makes name distinctions in the naming of schema. For schema files containing definitions of CX tables, the UNIX file name begins with the letter *t* followed by characters describing the table's English name (e.g., *tst* for the State table). For schema files containing definitions of CX records, the UNIX file name describes the record's English name (e.g., *id* for ID record).

The first line in a schema file, after revision information, specifies the INFORMIX database table or record that the schema defines. For example, *st_table* (State table) is specified in the *tst* schema file.

Field Descriptions

Schema files contain descriptions of each field defined in a table or record. You can view descriptions of the fields in Financial Aid tables and records by accessing the schema files.

Schema File Reports

Introduction

The standard CX includes three reports that provide information about the tables and records used in each product area. When table implementation begins, you can run the reports to provide the installation team with the most current information about the tables and records, and the columns in each.

Report Locations

Access the reports from the System Management: Data Dictionary menu.

Report Descriptions

The following three reports provide information that is useful during the table setup phase of implementation:

Database Fields for the CX Database Dictionary

Report filename: *dbefield*

Menu option: Fields by File Report

Description: This report lists each column in the specified range of files (e.g., *id_rec* to *profile_rec*), including its name, short and long descriptions, field type, and size.

Database Files for the CX Database Dictionary

Report filename: *dbefile*

Menu option: Fields by Track Report

Description: This report lists each table that relates to the specified range of product areas (e.g., A for Admissions to F for Financial), including the table name, description, and purpose.

Database Files/Fields for the CX Database Dictionary by Track

Report filename: *dbetrack*

Menu option: File/Field by Track Report

Description: This report combines the contents of *dbefield* and *dbefile*, displaying the tables for the specified product areas (e.g., A for Admissions to F for Financial) and the columns in each table.

Financial Aid Tables and Records

Table and Record Information

The following list identifies the tables and records that originate from the Financial Aid product. The list includes the filenames, location, purpose, and association of each table and record with programs, products, and other tables and records. The tables and records appear in the following order:

- Compliance tables and records
- Electronic Data Exchange (EDE) tables and records
- Enrollment Status tables
- Expense Budget tables and records
- Loan tables and records
- Need Analysis tables and records
- Packaging tables and records
- Primary Financial Aid tables and records
- Pell RFMS tables and records
- Satisfactory Academic Progress (SAP) tables
- Verification tables

Note: The *Program interrelationships* in the list are included in the Financial Aid product. The *Product interrelationships* in the list are not included in the Financial Aid product.

Compliance Tables and Records

The following lists the schema files that define the fields in the tables and records used for compliance in the Financial Aid product.

Compliance Association table

Associates compliance requirements with an aid code, an aid funding code, or all financial aid codes. The aid funding code allows the same compliance requirements to be used on every aid from the funding source. This is useful for state or federal funded awards that have the same overall compliance requirements for each aid.

UNIX filename: tcplyas

Informix filename: cplyas_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: cply_seq_table

Compliance Requirements table

Defines the requirements that must be completed before compliance is met. All the requirements for an aid or funding must be completed before an aid passes compliance.

UNIX filename: tcplyreq

Informix filename: cply_req_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: none

Compliance Sequence table

Associates compliance criteria records with a compliance requirement. Sequences can be broken down into sets of sequences using a sequence number. A requirement must have at least one sequence set completed. For a sequence set to be completed, each criteria in the sequence must be completed.

UNIX filename: tcplyseq

Informix filename: cply_seq_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: cplyas_table, cply_crit_table

Compliance Criteria table

Defines the compliance test criteria used to verify if a student completes the compliance requirements for a financial aid. The criteria table defines compliance tests which *faentry* uses to compare individual student data against.

UNIX filename: tcplycrit

Informix filename: cply_crit_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: cply_seq_table

EDE Tables and Records

The following lists the schema files that define the fields in the tables and records used for electronic data exchange in the Financial Aid product.

Institutional Student Information Report (ISIR)

Contains all ISIR (Institutional Student Information Report, formerly ESAR (Electronic Student Aid Report)) data received from the CPS. The record allows the Financial Aid office to keep all CPS transactions (not just the most current) in the event that payment was not made on the most current transaction number. Therefore, a student can have multiple ISIR records (esar_rec) that correspond to each CPS transaction that the student has processed.

UNIX filename: esar

Informix filename: esar_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: none

Product interrelationships: Financial Aid

Table/record interrelationships: none

Student Aid Report (SAR) Number table

Defines the correlation between naf field name and field number of SAR as used in correction formatting.

UNIX filename: tsarno

Informix filename: sarno_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: none

Product interrelationships: Financial Aid

Table/record interrelationships: naf_rec

Enrollment Status Tables and Records

The following lists the schema files that define the fields in the tables and records used to determine enrollment status in the Financial Aid product.

Aid Detail record

Identifies the award amount for each enrollment status.

UNIX filename: aiddtl

Informix filename: aiddtl_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: aiddtl_table, aid_rec

Financial Aid Detail table

Identifies the award characteristics for an aid and session relative to the full time award amount.

UNIX filename: taiddtl

Informix filename: aiddtl_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: aid_table

Financial Aid Enrollment Schedule table

Identifies the institution's enrollment schedules.

UNIX filename: tschdsess

Informix filename: schdsess_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: faschd_table

Table/record interrelationships: none

Financial Aid Schedule table

Identifies the different enrollment schedules for the institution.

UNIX filename: tfaschd

Informix filename: faschd_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: schdsess_table

Financial Aid Session table

Contains detailed financial aid session specific information.

UNIX filename: tfasess

Informix filename: fasess_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: none

Schedule Session table

Identifies the institution's different enrollment schedules.

UNIX filename: tschdsess

Informix filename: schdsess_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: faschd_table

Expense Budget Tables and Records

The following lists the schema files that define the fields in the tables and records used for budgeting in the Financial Aid product.

Financial Aid Budget Detail record

Contains individual student financial aid expense budget item amounts.

UNIX filename: fabgtdtl

Informix filename: fabgtdtl_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry, faneed

Product interrelationships: Financial Aid

Table/record interrelationships: fabgt_rec

Budget Group Association table

Identifies the institution's enrollment status budgets to group together. For example, a full-time commuter budget is grouped with a half-time commuter budget in a commuter budget group.

UNIX filename: tbgtgrpas

Informix filename: bgtgrpas_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: bgtgrp_table

Budget Group table

Identifies the name of the budget group. For example, *commuter* is a budget group.

UNIX filename: tbgtgrp

Informix filename: bgtgrp_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: bgtgrpas_table

Financial Aid Budget Expense Association table

Associates subsidiary total codes with expense item codes for display in the *faneed* program on its budget display screen. *Faneed* uses this table to read in the actual expenses

associated with an expense item so that estimated budget expenses can be compared to the actual expenses.

UNIX filename: tfaexpas

Informix filename: faexpas_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: fa_item_table

Financial Aid Budget record

Contains individual student financial aid expense budget information and amounts by session and year.

UNIX filename: fabgt

Informix filename: fabgt_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: fabgdtl_rec, fabgt_table, stufa_rec

Financial Aid Budget table

Defines the valid student financial aid expense budget categories used by the Financial Aid product. Each budget category can contain different budget items and dollar amounts depending on the type of student.

UNIX filename: tfabgt

Informix filename: fabgt_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faneed, faentry

Product interrelationships: Financial Aid

Table/record interrelationships: fabgtas_table

Financial Aid Expense Item table

Identifies the valid expense budget items for each financial aid expense budget.

UNIX filename: tfaitem

Informix filename: fa_item_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faneed, faentry

Product interrelationships: Financial Aid

Table/record interrelationships: fabgtas_table, faexpas_table

Financial Aid Expense Item Association table

Defines the budget items and budget item amounts for a budget category for each session financial aid is awarded. The amounts are used as default amounts when a budget record is initially added for a student. Up to six budget items can be given for each budget code and for each session.

UNIX filename: tfabgtas

Informix filename: fabgtas_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faentry, faneed

Product interrelationships: Financial Aid

Table/record interrelationships: fabgt_table, fa_item_table

Loan Tables and Records

The following lists the schema files that define the fields in the tables and records used for loan processing in the Financial Aid product.

Disbursements Status Table

Defines valid disbursement statuses in loan tracking.

UNIX filename: tdisbstat

Informix filename: disbstat_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loandisb_rec, aid_rec

Grade Level Table

Defines valid grade levels used in the loan tracking module.

UNIX filename: tgradelvl

Informix filename: gradelvl_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loanorig_table

Guarantor Table

Defines valid guarantee agencies for loan tracking module.

UNIX filename: tloanguar

Informix filename: loanguar_table

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Lender Table

Defines valid lenders for the loan tracking module.

UNIX filename: tlender

Informix filename: lender_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Loan Alternate Record

Contains Alternate Loan Information.

UNIX filename: loanalt

Informix filename: loanalt_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: aid_rec

Loan Amount Maximums Table

Contains maximum loan amounts based on grade level.

UNIX filename: tloanmax

Informix filename: loanmax_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loantype_table, gradelvl_table

Loan Batch Record

Stores import/export loan tracking file information.

UNIX filename: loanbatch

Informix filename: loanbatch_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loanede

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loanorig_table

Loan Change Record

Stores change request information.

UNIX filename: loanchg

Informix filename: loanchg_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loandisb_rec

Loan Disbursement Record

Contains loan disbursement information.

UNIX filename: loandisb

Informix filename: loandisb_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loanede, loanpost

Product interrelationships: Financial Aid Loan

Table/record interrelationships: disbstat_table, loan_rec, aid_rec

Loan Orig Table

Defines valid codes for loan origination agencies that are tracked by the loan tracking module.

UNIX filename: tloanorig

Informix filename: loanorig_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Loan Period Disbursement Information Table

Contains loan period disbursement grouping information.

UNIX filename: tloanprd

Informix filename: loanprd_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Loan Record

Contains CommonLine and Direct Lending Loan Information.

UNIX filename: loan

Informix filename: loan_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: gradelvl_table, lender_table, loanchg_rec,
loandisb_rec, loanguar_table, loanorig_table, loanprd_table, loanstat_rec,
loanstat_table, loanstu_rec, loantype_table , aid_rec

Loan Stat Table

Defines valid loan statuses for the loan tracking module.

UNIX filename: tloanstat

Informix filename: loanstat_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: disbstat_table, loan_rec

Loan Status Record

Contains loan status history information.

UNIX filename: loanstat

Informix filename: loanstat_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loanstat_table

Loan Student Record

Contains Student Loan Information for PLUS loans.

UNIX filename: loanstu

Informix filename: loanstu_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Loan Tracking Change Table

Stores CommonLine loan tracking change field numbers.

UNIX filename: tloanchg

Informix filename: loanchg_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loanorig_table

Loan Tracking Disbursement Information Table

Contains loan disbursement date information.

UNIX filename: tloandisb

Informix filename: loandisb_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loandisb_rec, loan_rec

Loan Tracking Format Table

Stores import/export loan tracking format information.

UNIX filename: tloanfmt

Informix filename: loanfmt_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable, loanede

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loanorig_table, loanrec_table

Loan Tracking Record Table

Stores loan tracking record type information.

UNIX filename: tloanrec

Informix filename: loanrec_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable, loanede

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loanfmt_table

Loan Type Table

Defines valid loan types for the loan tracking module.

UNIX filename: tloantype

Informix filename: loantype_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loanorig_table

Need Analysis Tables and Records

The following lists the schema files that define the fields in the tables and records used for need analysis in the Financial Aid product.

Note: CX automatically maintains the Financial Aid Need Analysis tables. Changes to the tables are made with annual Financial Aid updates as necessary.

Asset Protection table

Contains the Department of Education-defined asset protection allowance.

UNIX filename: tapa

Informix filename: apa_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Available Taxable Income table

Contains the Department of Education-defined information used to determine the available taxable income (ATI).

UNIX filename: tati

Informix filename: ati_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Business and Farm Net Worth table

Contains the Department of Education-defined information used to determine the net worth of business and farm assets.

UNIX filename: tbusfarm

Informix filename: busfarm_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Discretionary Net Worth table

Contains the Department of Education-defined information used to calculate discretionary net worth (DNW).

UNIX filename: tdnw

Informix filename: dnw_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Financial Aid Method table

Defines the valid need analysis methods used by financial aid to calculate need analysis information. You must make entries to this table for each financial aid year in the system.

UNIX filename: tfameth

Informix filename: fameth_table

Program interrelationships: faneed, faentry

Product interrelationships: Financial Aid

Table/record interrelationships: none

Financial Aid Tape Conversion record

Contains student financial aid information received from various financial aid tapes, including: Federal Test tape, ACT, CSS, GAPFAS, and PHEAA. The record is grouped in the following way:

- Tape identification fields
- Data element dictionary
- Common information (between at least two of the need analysis services)
- rec (contains id_rec, profile_rec, and stufa_rec information so that separate sections do not need to be created for these records)
- faneed_rec
- fana_rec
- fabgt_rec
- Federal-specific information
- ACT-specific information
- CSS-specific information
- GAPFAS-specific information
- PHEAA-specific information
- NSLDS-specific information
- Composite indexes

UNIX filename: natp

Informix filename: natp_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: fabgt_rec, fana_rec, faneed_rec, id_rec, naf_rec, profile_rec, prog_table, stufa_rec

Financial Aid Tax table

Defines the tax brackets used in calculating estimated federal income tax for financial aid need analysis.

UNIX filename: tfatax

Informix filename: fatax_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Financial Need record

Contains a student's financial need information for an academic year. The record stores need analysis end result information for each student, financial aid year, and need analysis method. The information is the total expense budget, expected family contribution, and the need of the student for a need analysis method. The information for the expected family contribution can either come from faneed calculations, or manual updates to the record through faneed.

UNIX filename: faneed

Informix filename: faneed_rec

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec, id_rec, fameth_table, bgtgrp_table

Independent Student Allowance table

Contains information for determining the independent student allowance (ISA).

UNIX filename: tisa

Informix filename: isa_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Intermediate Calculations record

Contains data and results of the intermediate calculations for the financial aid need analysis. The *faneed* adds and updates this record for each need analysis method calculated. A student has a fana_rec for each financial aid award year.

UNIX filename: fana

Informix filename: fana_rec

Program interrelationships: faneed, faentry

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec

Need Analysis Form record

Contains financial aid need analysis form (NAF) information. The record stores student family information. *Faneed* adds and updates this record. A student has a *naf_rec* for each financial aid award year.

UNIX filename: naf

Informix filename: naf_rec

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec, faneed_rec, natp_rec

National Student Loan Data System record

Contains historical information about student loans from NSLDS information from the Department of Education. The record stores student loan history information. *Faneed* adds and updates this record. A student has an *nslds_rec* for each financial aid award year.

UNIX filename: nslds

Informix filename: nslds_rec

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec, faneed_rec, natp_rec, naf_rec

Tax Allowance table

Defines the data used to calculate the state and local tax allowance.

UNIX filename: ttaxallow

Informix filename: taxallow_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: st_table

Packaging Tables and Records

The following lists the schema files that define the fields in the tables and records used for packaging in the Financial Aid product.

Aid Packaging table

Defines the aid restrictions, stores aid fund balances, and defines tickler contact codes for each award code. *Faentry* adds entries to this table automatically when adding an aid code for the first time. This table's entries are unique by financial aid year, academic program, funding category, packaging code, aid type, and aid code. Even though *faentry* adds entries to this table to store accumulated aid amounts, you should manually update or add entries for financial aids which have award amount restrictions and for tickler contacts that are added when a student is awarded an aid.

UNIX filename: taidpkg

Informix filename: aidpkg_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: pkg_table, pkgobj_table

Note: This table is also known as the Fund Balance table.

Package Method table

Establishes packaging method parameters per academic year used in automated packaging of student financial aid.

UNIX filename: tpkg

Informix filename: pkg_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: pkgobj_table, aidpkg_table

Package Objectives table

Defines packaging constraints on aid types within an automated packaging method.

UNIX filename: tpkgobj

Informix filename: pkgobj_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: pkg_table, aidpkg_table,

Packaging Parameter record

Defines the parameters used to run automated Financial Aid Packaging.

UNIX filename: ppkg

Informix filename: ppkg_rec

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: pkg_table

Primary Financial Aid Tables and Records

The following lists the schema files that define the fields in the tables and records used by most of the processes in the Financial Aid product.

Aid record

Contains a student's financial aid award amount information by student, financial aid year, and session. Each student can receive different aid and awards each session a student is to receive financial aid. This record stores the amount of each award and the status of each award.

UNIX filename: aid

Informix filename: aid_rec

Program interrelationships: billing, faentry

Product interrelationships: Student Billing, Financial Aid

Table/record interrelationships: stufa_rec, aid_table

Aid table

Contains the valid aid codes used in CX and detailed descriptions of the specific aids (e.g., BOGG for Board of Governors Grant).

UNIX filename: taaid

Informix filename: aid_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: aid_rec, aid_form_table, fndg_table

Aid Form table

Identifies each of the valid forms of aid under each aid type. For example, the aid type of grants can be in the following aid forms: general scholarships, state grants, academic scholarships, performance grants.

UNIX filename: taidform

Informix filename: aid_form_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: aid_type_table, aid_table

Aid Transcript record

Contains the student's financial aid transcript information separated for each institution attended.

UNIX filename: fatran

Informix filename: fatran_rec

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: faload_rec

Aid Type table

Identifies the major types or categories of financial aid offered by the institution, including codes for grants, scholarships, and jobs.

UNIX filename: taidtype

Informix filename: aid_type_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: aid_form_table

Financial Aid Transcript Loan record

Contains the student's loan information for the financial aid transcript.

UNIX filename: faload

Informix filename: faload_rec

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec

FISAP record

Contains Title IV financial aid information needed for yearly governmental FISAP reporting.

UNIX filename: fisap

Informix filename: fisap_rec

Program interrelationships: fisap

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec, id_rec, faneed_rec, fana_rec, nslds_rec, naf_rec, profile_rec, fscl_cal_rec, aid_rec, fisap_rec, faedit_rec, immeth_table

Funding table

Contains codes for valid sources of financial aid (e.g., STAT for State Funding).

UNIX filename: tfndg

Informix filename: fndg_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: none

Student Financial Aid record

Contains general student financial aid information within an award year. *Faentry* and *faneed* add a *stufa_rec* for each student the first time you add financial aid information for a student. A student has a *stufa_rec* for each financial aid award year.

UNIX filename: stufa

Informix filename: stufa_rec

Program interrelationships: faentry, faneed, fisap, sap

Product interrelationships: Financial Aid

Table/record interrelationships: id_rec, esar_rec, fafbt_rec, fana_rec, faneed_rec, naf_rec, aid_rec

Student Financial Aid BLOB

Stores text notes associated with a student's *stufa_rec*.

UNIX filename: bstufa

Informix filename: bstufa_blob

Program interrelationships: faentry, faneed

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec

Pell RFMS Tables and Records

The following lists the schema files that define the fields in the tables and records used for Pell RFMS in the Financial Aid product.

Pell RFMS record (formerly EDE/Pell record)

Contains a student's Pell RFMS award information.

UNIX filename: edepell

Informix filename: edepell_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: rfme.y

Product interrelationships: Financial Aid

Table/record interrelationships: pelldisb_rec, id_rec, naf_rec, fabgt_rec, acad_cal_rec, aid_rec, faneed_rec, fameth_table

Pell RFMS table (formerly, EDE/Pell table)

Contains default fields for all fields in the edepell_rec that have a common assignment for the majority of students.

UNIX filename: tedepell

Informix filename: edepell_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: edepell, rfme.y

Product interrelationships: Financial Aid

Table/record interrelationships: edepell_rec, pelldisb_rec, id_rec, naf_rec, fabgt_rec, acad_cal_rec, aid_rec, faneed_rec, fameth_table

Pell Disbursement record

Maintains and tracks reported disbursement data.

UNIX filename: pelldisb

Informix filename: pelldisb_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: edepell

Product interrelationships: Financial Aid

Table/record interrelationships: edepell_rec, id_rec, naf_rec, fabgt_rec, acad_cal_rec, aid_rec, stufa_rec

Satisfactory Academic Progress Tables and Records

The following lists the schema files that define the fields in the tables and records used for determining satisfactory academic progress in the Financial Aid product.

Criteria table

Identifies the SAP criteria codes and descriptions used for each track, including:

- ROOT
- UNDG
- GRAD
- GEN
- SCHL

UNIX filename: tcrit

Informix filename: crit_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: sapcrit_table

Financial Aid SAP Action table

Identifies the characteristics of each satisfactory academic progress status. The table defines each SAP status action, including:

- An aid code to change status
- A contact to create
- A special stored procedure to run
- A SAP status to update

Note: Multiple types of actions can be assigned in the same record.

UNIX filename: tfasapact

Informix filename: fasapact_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: fasap_table, fasap_rec

Financial Aid SAP Track table

Identifies the characteristics of each satisfactory academic progress status. The table defines each valid code for every track, including:

- FINAID
- REGIST
- SCHOLAR
- VETERANS

UNIX filename: tsaptrk

Informix filename: saptrk_table

Program interrelationships: faentry, fasap

Product interrelationships: Financial Aid

Table/record interrelationships: sap_rec, fasap_table, fasap_rec

Financial SAP table

Identifies the characteristics of each satisfactory academic progress status. The table defines each SAP status and its associated compliance code, including:

- PASS
- FAIL
- WARN
- APPL
- FSAP
- PSAP

UNIX filename: tfasap

Informix filename: fasap_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: faspact_table, stufa_rec

SAP Criteria table

Identifies the characteristics of each satisfactory academic progress criteria. The table defines the logical relationships between the Parent SAP Criteria Codes and the SAP criteria codes, including:

- AND/OR operator conditions
- Stored procedures associated with SAP criteria codes

Note: The SAP Criteria Code that has ROOT as the parent will not have an operator or procedure value.

UNIX filename: tsapcrit

Informix filename: sapcrit_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: crit_table

Verification Table

The following lists the schema file that defines the fields in the table used to verify financial aid in the Financial Aid product.

Financial Aid Verification table

Identifies the characteristics of each field on the Verification screen in faneed.

UNIX filename: tfavor

Informix filename: faver_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: naf_rec

SECTION 4 - MACROS, INCLUDES, AND CONFIGURATION TABLE ENTRIES

Overview

Introduction

This section provides reference information about macros, includes, and Configuration table entries used to set up the Financial Aid product.

The Relationship Among Macros, Includes and C Programs

For all elements of the product other than C programs, m4 macros contain the definitions of features that have been designed to be modified for each institution. These macros, located under \$CARSPATH/macros, are passed through the m4 processor.

CX contains an alternative method for the setting of features in C programs. Macros in the source code of C programs are not passed through the m4 processor because the C compiler has its own preprocessor, the cc.

To provide the same apparent functionality to C programs, a section in the include source directory has been allocated for a type of include file that acts as an intermediary between the m4 processor and the cc preprocessor. In operation, m4 macros are defined whose output is a valid cc macro. These m4 macros are placed in the include files. Then the include files are translated and the appropriate cc macro is placed in the include file. The installed include file is included by the C compiler at compile time so that the result of the compilation is influenced by the m4 macro.

Some CX programs use Configuration table entries in place of macros. Configuration table entries can enable features, set up options, and define valid and default values. Unlike macros, you can update or add Configuration table entries through normal table maintenance.

Configuration Table

Some CX programs use Configuration table entries in place of macros. Configuration table entries can enable features, set up options, and define valid and default values. Unlike macros, you can update or add Configuration table entries through normal table maintenance.

General Installation Procedures

See the *CX System Reference Technical Manual* for general procedures on setting and installing changes to macros and includes.

Financial Aid Macros

Introduction

CX contains macros that define specific values used throughout the Financial Aid product. The macros and includes enable you to change the available options and functionality of the Financial Aid product without having to modify C code. By modifying macros, you can customize your implementation of the Financial Aid product, and make the product easier to maintain.

The following lists and describes the macro files that affect or have an effect on the Financial Aid product. The macros are located in the following directory path: \$CARSPATH/macros/custom.

configure

Contains macros to enable features of the Financial Aid product.

ltrwp

Contains macros that define two-character nroff (text formatter) macros.

periodic

Contains macros that you change periodically for financial aid, including:

- Government-specified academic session type
- Financial aid years
- Session order
- Session/Year values
- Tickler code
- Pell RFMS codes (formerly EDE/Pell)

student

Contains macros that enable features that are common to several types of files, including (for example):

- Document tracking
- EDE
- Pell RFMS (formerly EDE/Pell)
- Financial Aid office posting student aid
- Funding Categories
- Refund check writing
- Tape conversion menu

table

Contains macros that define the default, valid, and include values in Financial Aid tables.

Definition and Function

A macro is an instruction that causes the execution of a pre-defined sequence of instructions in the same source language. A macro consists of uppercase letters and underscores, and is used in place of a text string within source files. CX expands the macro to the longer text during the installation process for a file. CX uses the following kinds of macros:

- Enables - allows you to enable a feature of CX
- DBS_COMMON - allows you to define database values in screens
- Periodic - allows you to make changes on a periodic basis

Macros can perform one of the following functions:

- Define defaults on a screen (_DEF)
- Define valid values in a field (_VALID or _INCL)
- Enable system products (ENABLE_MOD)
- Enable system features (ENABLE_FEAT)

- Establish a valid value for an include

How to Locate Macros

To modify Financial Aid macros, access the following:

- \$CARSPATH/macros/custom/student
- \$CARSPATH/macros/custom/periodic
- \$CARSPATH/macros/custom/table
- \$CARSPATH/macros/custom/configure
- \$CARSPATH/macros/custom/ltrwp

To access Common macros, access the \$CARSPATH/macros/custom/common file.

Applocate Program

You can also locate macros using the *applocate* program. *Applocate* checks the descriptions of macro files for the product you specify, and creates a file that lists each macro found.

Note: To locate the macros used in Financial Aid, using *applocate*, you must specify the product's name.

The following procedure lists the steps to run the *applocate* program.

1. Select Utilities from the CX menu. The Utilities: Main menu appears.
2. Select File Options. The Utilities: File Options menu appears.
3. Select Locate Macro Values. The Locate Macro Values screen appears.
4. Select **Table Lookup** in the Category field. A list of product names appears in a table lookup box.
5. Select a product name (e.g., STUDENT/SERVICES). The table lookup box disappears.
6. Select **Finish**. The Output Parameters window appears.
7. Do the following:
 - In the Time field, enter **NOW**.
 - In the Background field, enter **Y**.
 - Select **Finish**.

The system places the file, *applocate.out*, in your home directory.

Enable Macros

The following lists the Financial Aid enable macros located in the *configure* and *student* macro files.

Note: The default value of each macro, either Y (yes) or N (no), appears in single quotes following the macro name.

ENABLE_EDE,`Y'

Enables the Financial Aid Office to Participate in EDE. The macro defines whether or not to display the menu options dealing with Electronic Data Exchange (EDE). The macro's default setting, Y, specifies that the following options appear in the Financial Aid: Student Processing Menu:

- EDE Processing (accesses the Financial Aid: EDE Processing menu)
- Pell Payment Processing (accesses the Financial Aid: Pell Payment Processing menu)

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_2POST,`N'

Enables the feature that allows the posting of student aid in two steps. The system first creates a (VT) transaction file for aid transactions, and then posts this file to the general ledger. The macro defines whether or not to display the menu options dealing with Financial Aid Disbursement. If you set the macro to Y, the Disburse Financial Aid option appears in the Student Management: Financial Aid Main menu. The option accesses the Financial Aid: Aid Disbursement menu.

Note: If you enable this macro, you must disable the ENABLE_FEAT_FA_POST macro.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_CTG,'Y'

Enables the funding categories feature. Categories are for example: NEW and RET.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_DOCTRK,'Y'

Enables the Financial Aid Document Tracking feature. The macro defines whether or not to display the menu options dealing with Document Tracking. The macro's default setting, Y, specifies that the Document Tracking option appears in the Student Management: Financial Aid Main menu. The option accesses the Financial Aid: Document Tracking menu.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_MNGRNT,'Y'

Enables the Financial Aid Minnesota State Grant screen. The macro defines whether or not to display the menu options dealing with the Minnesota State Grant. The macro's default setting, Y, specifies that the Minn. State Grant Table option appears in the Table Maintenance: Packaging Tables menu.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_PHEAA,'Y'

Enables the PHEAA Need Data Tape Conversion feature.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_POST,'N'

Enables the feature that allows the posting of student aid in one step. Y indicates that the Financial Aid Office will control the posting process. N indicates that the Business Office will control the posting of aid. The macro defines whether or not to display the Post Financial Aid menu option. If you set the macro to Y, the Post Financial Aid option appears in the Student Management: Financial Aid Main menu.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_SAP,'N'

Enables the Financial Aid Satisfactory Progress (fasap) feature. Defines whether or not to display the menu options dealing with Financial Aid Satisfactory Progress. If you set the macro to Y:

- The SAP Processing option appears in the Financial Aid: Student Processing Menu. The option accesses the Financial Aid: SAP Processing menu.
- The SAP Tables option appears in the Financial Aid: Table Maintenance menu. The option accesses the Table Maintenance: SAP Table menu.

Note: The macro is needed to install the src/finaid/fasap program properly. When you activate fasap, you must set up the fasap_table, sapcrit_table, and crit_table.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_STATCTC,'Y'

Enables the feature that allows the creation of Financial Aid status letters from contacts. The macro defines whether or not to display the menu options dealing with status letters in Document Tracking. The macro's default setting, Y, specifies that the following options appear in the Document tracking: Letters menu:

- Select Status Letter - One
- Select Status Letters - All
- Create Status Letters (Itrstatctc script)

If you set the macro to N, the Create Status Letters option (Itrfastat script) appears in place of the above three options.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_TPCONV,`Y'

Enables the Need Analysis Tape Conversion feature. The macro defines whether or not to display the menu options dealing with Need Analysis Tape Conversion. The macro's default setting, Y, specifies that the Tape Conversion option appears in the Student Management: Financial Aid Main menu. The option accesses the Financial Aid: Need Analysis Tape Conversion menu.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_TRANSRPTS,`Y'

Enables the Financial Aid Office to print account transaction reports. The macro defines whether or not to display the menu options dealing with Financial Aid transaction reports. The macro's default setting, Y, specifies that the Aid Transactions option appears in the Financial Aid: Reports Menu. The option accesses the Reports: Aid Transactions menu.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FA_VERIF,`N'

Enables the Verification feature for use with natp and faneed. The macro defines whether or not to display the menu options dealing with Financial Aid Verification. If you set the macro to Y, the Verification Tables option appears in the Financial Aid: Table Maintenance menu. The option accesses the Table Maintenance: Verification Table menu.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_FADATA_AUDIT,`N'

Enables the financial aid data audit feature, which creates an audit trigger in the stufa_rec, aid_rec, naf_rec, and faneed_rec. This trigger creates audit records in an audit database, which you must create. The macro also defines whether or not to display the menu options dealing with Financial Aid Audit Reports. If you set the macro to Y, the Audits option appears in the Financial Aid: Reports Menu. The option accesses the Financial Aid Audits Reports menu.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_MULTIPKG,`N'

Enables the Financial Aid Packaging multi-packaging feature. When you enable this feature, the Financial Aid office creates an award amount for each enrollment status found in the fasess_table. The system creates aiddtl_recs, and when a package is installed, the system creates multiple award amounts, used to recalculate the award online realtime. The macro defines whether or not to display the menu options dealing with Financial Aid Packaging. If you set the macro to Y:

- The Enrollment Status Tables option appears in the Financial Aid: Table Maintenance menu. The option accesses the Table Maintenance: Enrollment Status Tables menu.
- The Budget Groups and Budget Groups Report options appear in the Table Maintenance: Budget Tables menu.

Note: To use this feature, you must set up the following tables: fasess_table, schdsess_table, aiddtl_table, bgtgrp_table, bgtgrpas_table.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_NSLDS_PRINT, `Y`

Enables the unofficial NSLDS print function in faneed.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_PELLCOA, `Y`

Enables the Financial Aid Pell cost of attendance feature. This feature creates a Pell COA budget when a student budget is created. The system uses Pell COA budgets for packaging Pell and reporting Pell. The Pell RFMS program (*edepell*) cannot determine the Pell COA for a student without this option.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_PELLCOA_PRORATE, `Y`

Enables the Financial Aid Pell cost of attendance proration feature. This option in conjunction with FEAT_PELLCOA allows the Financial Aid Packaging to prorate the Pell payments. The system prorates Pell COA budget items according to the USDE regulations. If you do not enable this macro and enable the PELLCOA feature, the system can only compute Pell using formula-1. If you enable both macros, the system can compute Pell with formulas 1-3.

Note: In order for this feature to work correctly, you must:

- Set up the acad_cal_rec and fill in the weeks and hours fields.
- Set the FA_WEEKS_INSTR_TIME and FA_HOURS_INSTR_TIME macros.

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_RFND_CTC, `Y`

Enables the feature that allows the refund aid check writing to run using Contact records (ctc_rec). A Y indicates that refund aid check selection utilizes ctc_recs. The macro defines whether or not to display the menu options dealing with check refunding using contacts. The macro's default setting, Y, specifies that the following options appear in the Refundable Aid menu:

- Refund - Contacts
- Post Refunds - Contacts

And, specifies that the following reports appear in the Refundable Aid: Reports menu:

- Refund Eligible - Fund
- Refund Eligible - Student

Access: \$CARSPATH/macros/custom/student

ENABLE_FEAT_RFND_ID, `N`

Enables the feature that allows the refund aid check writing to run off IDs and not ctc_recs. A Y indicates refund aid check selection utilizes IDs for selection. The macro defines whether or not to display the menu options dealing with check refunding using student ID numbers. The macro's default setting, Y, specifies that the following options appear in the Refundable Aid menu:

- Refund - ID
- Post Refunds - ID

Access: \$CARSPATH/macros/custom/student

ENABLE_FEE_COLLECTION, `N`

Defines whether or not to display the menu options dealing with financial aid check refunding. If you set the macro to Y, the Refundable Aid option appears in the Financial Aid: Student Processing Menu. The option accesses the Refundable Aid menu.

Note: This is not a Financial Aid macro; however, you must enable the Fee Collection feature to use the Financial Aid Refund features.

Access: \$CARSPATH/macros/custom/financial

ENABLE_MOD_FINAID, `Y'

Enables the Financial Aid product.

Access: \$CARSPATH/macros/custom/configure

ENABLE_MOD_FINAID_PKG, `Y'

Enables the Financial Aid Packaging feature. The macro defines whether or not to display the menu options dealing with Financial Aid Packaging. The macro's default setting, Y, specifies that:

- The Automated Packaging option appears in the Financial Aid: Student Processing menu. The option accesses the Student Processing: Automated Packaging menu.
- The Packaging Tables option appears in the Financial Aid: Table Maintenance menu. The option accesses the Table Maintenance: Packaging Tables menu.
- The Packaging Codes, Packaging Codes Report, and Copy Packaging Tables options appear in the Table Maintenance: Packaging Tables menu.

Access: \$CARSPATH/macros/custom/configure

ENABLE_MOD_LOAN_TRACKING, `Y'

Enables the Financial Aid Loan Tracking product.

Access: \$CARSPATH/macros/custom/configure

ENABLE_MOD_PAYROLL, `Y'

Defines whether or not to display the menu options dealing with College Work study reports. The macro's default setting, Y, specifies that the College Work Study Program option appears in the Financial Aid: Reports Menu. The option accesses the Payroll: College Work Study Program menu.

Note: This is not a Financial Aid macro; however, the Payroll product must be enabled in order to set up the Financial Aid College Work Study feature.

Access: \$CARSPATH/macros/custom/configure

Periodic Macros

The following lists the Financial Aid periodic macros, located in the *periodic* macro file.

Note: The macro file is located in the following directory path:
\$CARSPATH/macros/custom/periodic

Academic Calendar type

This macro defines the type of Academic Calendar (used in Pell RFMS for creating an original Pell RFMS record):

- PELL_ACADCAL, `3'

Notes:

- 1 = Non-standard, measured by credit hours or units
- 2 = Standard Quarters, measured by credit hours
- 3 = Standard Semesters, measured by credit hours
- 4 = Standard Trimesters, measured by credit hours
- 5 = Non-standard, measured by clock hours

Financial Aid award years

These macros define Financial Aid (FA) award years:

- FA_YR_PREV, `0001'
- FA_YR_CUR, `0102'
- FA_YR_NEXT, `0203'

Financial Aid session order

This macro defines Financial Aid Session Order (you can enter up to four sessions):

- FA_SESS_ORDER, `FA01 SP02'

Financial Aid Tickler codes

These macros define Financial Aid Tickler codes:

- FA_TICK_DEF, `FY01'
- FA_TICK_VALID, `FY93,FY94,FY95,FY96,FY97,FY98,FY99,FY00, FY01, FY02'
- FA_TICK_INCL, `include=(FA_TICK_VALID), upshift')
- FA_TICK_NEXT, `FY02'

Institution ID number

This macro defines the institution's ID number:

- INSTID, `023456'

Student Macros

The following lists the Financial Aid student macros, located in the *student* macro file.

Note: The enable macros located in the *student* file are listed in the *Enable Macros* list above. The *student* macro file is located in the following directory path:
\$CARSPATH/macros/custom/student

Award Letters variable paragraphs

These macros define Financial Aid macros for defining variable paragraphs in Award Letters:

- FA_ANF_CODE1, `CWSP'
- FA_ANF_CODE2, `OUTS'
- FA_ANF_CODE3, `PELL'
- FA_ANF_CODE4, `PERK'
- FA_ANF_CODE5, `STGR'
- FA_ANF_CODE6, `GSL'
- FA_ANF_END, `ANFCLS'

Award Notices: categories

These macros define Financial Aid Award Notice categories (sections):

- FA_AWD_CTG_DEF, `A'
- FA_AWD_CTG_VALID, `A,B,C,D,E'
- FA_AWD_CTG_INCL, `include=(FA_AWD_CTG_VALID)'
- FA_AWD_CTG_EX, `(A),(B),(C),(D),(E).'

Budgets: Budget Length defaults

These macros define Budget Length defaults (Independent students only):

- BGT_LENGTH_DEF, `9'
- BGT_LENGTH_INCL, `include = (1:12)'

Budgets: Intended Schedule defaults

These macros define Budget Intended Schedule defaults:

- BGT_INTEND_SCH_DEF, `F'
- BGT_INTEND_SCH_VALID, `F,H,L,T'
- BGT_INTEND_SCH_INCL, `include = (BGT_INTEND_SCH_VALID)'
- BGT_INTEND_SCH_EX, `(F)ull, (H)alf, (L)ess than 1/2, (T)hree quarter.'

Contact Resource defaults: Financial Aid Status Letter

This macro defines the Contact Resource default value for the Financial Aid Status Letter:

- CTC_FA_STAT_DEF, `FASTAT`

Contact Resource defaults: Pell Payment selection

This macro defines the Contact Resource default value for Pell Payment selection:

- CTC_FA_EDEPELL_DEF, `PELLPMT`

Contact Resource defaults: Verification

This macro defines the Contact Resource value for when verification begins:

- VERIFICATION_CONTACT, `VER`

EDE: path names

These macros define path names for EDE file processing:

- ORIGPATH, IDS_PATH`/pcfin/original.inp`
- CORPATH, IDS_PATH`/pcfin/correct.inp`
- EDEPATH, IDS_PATH`/pcfin`

Financial Aid: Amount status values

These macros define Financial Aid Amount Status values:

- FA_AMT_STAT_DEF, `AA`
- FA_AMT_STAT_VALID, `AA,EA`
- FA_AMT_STAT_INCL, `include=(FA_AMT_STAT_VALID)`
- FA_AMT_STAT_EX, `(AA) or (EA).`

Financial Aid: Dependency values

These macros define the Financial Aid Dependency values:

- FA_DEP, `D`
- FA_INDEP, `I`

Financial Aid: Entitlement Program default

This macro defines the Financial Aid Entitlement Program default:

- FA_ENTITLE_DEF, `PELL`

Financial Aid: Examples

These macros define financial aid examples:

- AID_TYPE_EG, `, eg: WORK, LOAN, GRNT.`
- AID_TBL_EG, `, eg: ATHB, ALUM, BASK, FOOT.`
- BGT_TYPE_EG, `, eg: R/DEP/FT, C/IND/PT.`
- FA_FORM_EG, `, eg: SCLR, ATHL, ACAD, PERF, TWVR.`
- FNDG_SRC_EG, `, eg: FEDC, INSE, STAT, OUT.`
- METHOD_TBL_EG, `, eg: CM, PELL.`

Financial Aid: Funding categories

These macros define Financial Aid Funding categories:

- FA_CTG_DEF, ` `
- FA_CTG_VALID, `",RET,NEW`
- FA_CTG_INCL, `include=(FA_CTG_VALID)`
- FA_CTG_EX, `(RET) or (NEW).`

Financial Aid: Matching Subsidiary values

These macros define Financial Aid Matching Subsidiary values:

- FA_MATCH_SUBS_DEF, `N`
- FA_MATCH_SUBS_VALID, `I,N,S`
- FA_MATCH_SUBS_INCL, `include=(FA_MATCH_SUBS_VALID)`
- FA_MATCH_SUBS_EX, `(I)D# only, (N)ot used, (S)ubsidiary Acct. Posting.`

Financial Aid: Record status values

These macros define Financial Aid Record Status values:

- FA_AID_STAT_DEF, 'I'
- FA_AID_STAT_VALID, 'A,C,I,H,N,P,R'
- FA_AID_STAT_INCL, 'include=(FA_AID_STAT_VALID)'
- FA_AID_STAT_EX, '(A)ccepted,(C)ampus auth.,(H)old,(I)ntended,(P)ending.'

Financial Aid: Status values

These macros define Financial Aid Status values:

- FA_PKG_STAT_DEF, 'A'
- FA_PKG_STAT_VALID, 'A,M'
- FA_PKG_STAT_INCL, 'include=(FA_PKG_STAT_VALID)'
- FA_PKG_STAT_EX, '(A) or (M).'

Financial Aid: Years

These macros define Financial Aid years:

- FA_YR_DEF, 'FA_YR_CUR'
- FA_YR_VALID, '9596, 9697, 9798, 9899, 9900, FA_YR_PREV,FA_YR_CUR,FA_YR_NEXT'
- FA_YR_INCL, 'include=(FA_YR_VALID), upshift')

Financial Aid Need Tape: MDE Source values

These macros define the Financial Aid Need Tape MDE Source values:

- FA_NEED_TAPE_DEF, 'CSS'
- FA_NEED_TAPE_VALID, 'ACT,CSS,PHEA,FED,GES'
- FA_NEED_TAPE_INCL, 'include=(FA_NEED_TAPE_VALID)'

Financial Aid Need Tape: Media Source values

These macros define the Financial Aid Need Tape Media Source values:

- FA_MEDIA_DEF, 'TAPE'
- FA_MEDIA_VALID, 'TAPE, FILE, EFIL'
- FA_MEDIA_INCL, 'include=(FA_MEDIA_VALID)'

Financial Aid Packaging: Financial Aid Package default

This macro defines the Financial Aid Package default:

- FA_AID_PKG_DEF, 'ACT'

Financial Aid Packaging: Level Limit default

This macro defines the Financial Aid Package Level Limit default:

- FA_PKG_LEVEL_LMT_DEF, '100'

FISAP reporting: Agency default

This macro defines Financial Aid Reporting Agency default:

- FA_RPT_AGENCY_DEF, 'FISAP'

FISAP reporting: Aid codes

These macros define Aid Codes used for FISAP reporting:

- FISAP_NDSL, 'PERK' '
- FISAP_CWSP, 'CWSP' '
- FISAP_SEOG, 'SEOG' "

Need Analysis: Projection Need Methods

These macros define Projection Need Analysis Methods:

- FA_PROJ_DEF, 'PROJ'
- FA_PROJ_VALID, 'PROJ'
- FA_PROJ_INCL, 'include=(FA_PROJ_VALID)'

Need Analysis: Simulation ID

This macro defines the Financial Aid Need Analysis Simulation ID:

- FA_SIM_ID, '40000'

Pell Cost Of Attendance: Hours of instructional time

This macro defines hours (i.e. semester/quarter) for a full-time student in school's definition of award year (used to determine the PELL COA):

- FA_HOURS_INSTR_TIME, `24'

Pell Cost Of Attendance: Pell COA budget name

This macro defines the name of the PELL COA budget (used to hold a student's financial aid Pell COA budget):

- FA_PELLCOA, `PELLCOA'

Pell Cost Of Attendance: Weeks of instructional time

This macro defines weeks of instructional time for a full-time student in school's definition of award year (used to determine the PELL COA):

- FA_WEEKS_INSTR_TIME, `30'

Pennsylvania State Grant Program (PHEAA): Code default

This macro defines the Financial Aid Pennsylvania State Grant Program Code default (must be the same as the four character code in the aid table):

- FA_PA_ST_GRANT_DEF, `STGR'

Program codes: Graduate/Professional

This macro defines the Graduate/Professional Program codes:

- PROG_GRAD, `GRAD'

Note: Update as necessary. Make sure the value is consistent with prog_table and PROG_VALID in \$CARSPATH/macros/custom/table.

Program codes: Undergraduate

This macro defines the Undergraduate Program codes:

- PROG_UNDG, `UNDG'

Note: Update as necessary. Make sure the value is consistent with prog_table and PROG_VALID in \$CARSPATH/macros/custom/table.

Satisfactory Academic Progress: Fail SAP status

This macro defines the Fail SAP status assigned to those students who are processed for SAP and fail the compliance stage:

- FAIL_SAP_STAT, `FFAL'

Satisfactory Academic Progress: Pass SAP status

This macro defines the Pass SAP status assigned to those students who are processed for SAP and pass the compliance stage:

- PASS_SAP_STAT, `FPAS'

Satisfactory Academic Progress: SAP action contact

This macro defines the SAP action contact created for those students who need to have some action taken:

- SAP_ACTION_CTC, `FASAPACT'

Satisfactory Academic Progress: SAP Selection Contact

This macro defines the SAP selection contact created for those students assigned who have a stufa_rec for the financial aid year passed to the finaid version of the selsapids informer:

- FA_SAP_SELECT_CTC, `FASAPSEL'

Satisfactory Academic Progress: SAP Track Default

This macro defines the SAP Track default assigned to those students who need to have some action taken. This track defaults into the financial aid sap menu options:

- FA_SAP_TRACK_DEF, `FINAID'

Note: The fasap src program creates these contacts during the compliance stage of the process. This feature allows the institution the opportunity to void contacts for those students who are not to have actions performed on them.

Table Macros

The following lists the Financial Aid table macros, located in the *table* macro file.

Financial Aid Method Table values

These macros define the Financial Aid Method Table valid and include values:

- FA_METH_VALID, `EFM,EFMS,FM,FMS,IM,SIM'
- FA_METH_INCL, `include=(FA_METH_VALID)'

Need Analysis Method default

This macros defines the Financial Aid Need Analysis Method default:

- FA_METH_DEF, `FM'

Note: Do not change these macros. The Jenzabar representative responsible for implementing the Financial Aid product will update these macros.

Financial Aid Includes

Introduction

The Financial Aid product contains includes that determine the features that are enabled in the product. An include can either be a compile option that enables or disables a feature, or a default value include that defines a default value for a feature.

Purpose

An include allows you to activate or deactivate features in C programs without changing the C code. You can also specify compilation values for an entry program in the Financial Aid product. By modifying includes, you can customize your implementation of the Financial Aid product, and make the product easier to maintain.

Note: For more information about using the MAKE processor and modifying includes, see the *Jenzabar CX Technical Manual*.

Macro Dependency

Includes have a dependency on macros. Normally, you do not directly modify includes for the product. You must modify a corresponding macro value and then reinstall the include.

How to Locate Includes

To locate a Financial Aid include, access the `$CARSPATH/include/custom/common` file.

Note: For more information about using the MAKE processor and modifying includes, see the *CX System Reference Technical Manual*.

Custom Includes

The following lists and describes the custom include files that affect or have an effect on the Financial Aid product. The includes are located in the following directory path:
`$CARSPATH/include/custom`.

billing

Contains includes that affect the Billing program compilation options and refund policies. You can define the following to be displayed in the SDS (Student Data Sheet) bill:

- The *estimated aid note* symbol (e.g., *) that appears before a financial aid amount with an EA status
- The Stafford (GSL) award multiplied by a discount percentage

bursar

Contains includes you can use to customize Bursar, including:

- Defining where financial aid will appear in the Bursar query and on the SDS bill
- Defining the sort order in the Bursar process
- Identifying (with a menu symbol) financial aid that is currently posted, but a change in status prevents the student from receiving the credit on his/her session balance

faneed

Contains customized values commonly used in the Financial Aid Need Analysis program, including (for example):

- Default need analysis form code
- Participation in EDE
- Valid need analysis forms

finaid

Contains customized values commonly used in the Financial Aid program, including (for example):

- Admissions office contacts
- Default contacts and status values
- Default first session codes
- Special contact codes
- Tickler contact codes
- Valid financial aid year constants

libbill

Contains includes that affect how financial aid values are displayed the Student statement, including:

- Displaying the difference between awarded and posted amounts
- Defining the subsidiary codes that indicate what displays in a pending financial aid section on a statement, if applicable

Application Includes

The following lists and describes the application include files that affect or have an effect on the Financial Aid product. The includes are located in the following directory path: \$CARSPATH/include/applic.

facomm

Contains includes that define the common macros used between Financial Aid programs.

libloan

Contains includes that define the common macros used within Financial Aid Loan.

Utility Includes

The following lists and describes the utility include files that affect or have an effect on the Financial Aid product. The includes are located in the following directory path: \$CARSPATH/include/util.

fa

Contains includes that define calculation libraries used in need analysis calculations. This file contains common values shared between the faneed program and the libraries.

fa97-01

Contains includes for the header file Financial Need Analysis calculation engine for:

- 96/97
- 97/98
- 98/99
- 99/00
- 00/01

facalc

Contains includes that contain common financial aid calculation library definitions beginning with 93/94.

facomm

Contains includes that define the common macros used between Financial Aid programs.

Configuration Table Entries

Introduction

Although most Financial Aid features and processes rely on macros, the Financial Aid Loan program accesses the Configuration table for processing instructions. This section contains descriptions of the Configuration table entries that the Financial Aid Loan product uses.

The Configuration table maintains program processing information for some CX programs. Programs that use information in the Configuration table do not need to be recompiled when Configuration table values change.

Configuration Table Entries for Financial Aid Loan

If you use the Financial Aid Loan product, define the following specified values in the Configuration table that affect processes and features.

ENABLE_FAENTRY_LOAN_ACCESS

Enables access to the Financial Aid Loan screens from within the Financial Aid Entry program. If access to the Financial Aid Entry screen is display only, then access to the Financial Aid Loan screens is also display only.

LOAN_BATCH_FILE_DIR

Defines the directory for creating Loan Export files and locating Loan Import files.

LOAN_DEFAULT_LOANGUAR

Defines the default Guarantor code (e.g., 800) used by your institution.

LOAN_DEFAULT_LOANORIG

Defines the default Origination Agency (DIRECT or COMMON) used by your institution.

LOAN_DEFAULT_NEED_METHOD

Defines the default Need Method code (e.g., FM) used by your institution.

LOAN_DEFAULT_PLUS_CODE

Used for Plus loans. This macro defines the default Parent Loans code (e.g., PLUS) used by your institution.

LOAN_DEFAULT_REQ_TYPE

Used for CommonLine loans. This macro defines the default Request Type code (e.g., CR) used by your institution.

LOAN_DEFAULT_STAF_CODE

Used for Stafford loans. This macro defines the default Stafford code (e.g., STAF) used by your institution.

LOAN_DEFAULT_UNSB_CODE

Used for Unsubsidized Stafford loans. This macro defines the default Unsubsidized Stafford code (e.g., UNSB) used by your institution.

LOAN_EFT_ADD_COMPLIANCE_CTC

This macro defines whether the Post Loans to Student Account process adds a Contact record (ctc_rec) if the edit checks pass. The ctc_rec.resrc is set to be the aid_rec.aid + aid_rec.sess + aid_rec.yr [3, 4]. For example, PLUSFA99. The ctc_rec.tick is set to "FY" + aid_rec.fa_yr [1, 2]. For example, FY99.

LOAN_EFT_ATTENDANCE_COST_TEST

This macro defines whether the Post Loans to Student Account process performs the Attendance Cost test.

LOAN_EFT_COURSE_NOCOUNT_LIST

For the Credit test, this macro identifies a list of courses that are not counted in the total hours registered. If a student is found to be enrolled in any of the comma-separated list of courses specified in this macro, the course load for those courses is excluded from the total registered hours.

LOAN_EFT_COURSE_PASS_LIST

For the Credit test, this macro identifies a list of courses that pass the test automatically. If a student is found to be enrolled in any of the comma-separated list of courses specified in this macro, they automatically pass the Credit test.

LOAN_EFT_CREDIT_TEST

When set to Y, the Post Loans to Student Account process performs the Credit test.

LOAN_EFT_ENTRANCE_INTERVIEW_CTC

Lists the Resource codes used to define the entrance interview contact(s).

LOAN_EFT_ENTRANCE_INTERVIEW_TEST

When set to Y, This macro causes the Post Loans to Student Account process to perform the Attendance Cost test.

LOAN_EFT_OVERAWARD_TEST

When set to Y, This macro causes the Post Loans to Student Account process to perform the Over-award test.

LOAN_EFT_OVERDISB_TEST

When set to Y, This macro causes the Post Loans to Student Account process to perform the Over-disbursed test.

LOAN_LENDER_ID_REQUIRED

When set to Y, this macro requires you to enter a CX ID number in the ID field when adding or updating the Lender Table Entry screen. When set to N, this macro allows you to leave a zero (0) in the ID field on the Lender Table Entry screen. In either case, the lender name appears as entered in the lookup of lenders from the loan tracking entry process, allowing the loan side to have a different name than the CX ID record. Or, in the case of no CX ID record, it allows a name to be stored by which the user can select a lender.

LOAN_MPN_DELIVERY_METHOD

This macro defines the default value for the Master Promissory Note (MPN) Delivery method (loan_rec.mpn_deliv field). This value is a one-character code indicating the preferred method of delivering the Master Promissory Note to the borrower. Valid codes are:

- Blank
- E (E-mail)
- P (Paper)
- W (Web)

The standard default of this macro is blank and should be changed only if your institution is currently set up to use MPN Loans. Once your institution is set up as an MPN school you must process all Stafford loans as MPN loans (e.g., you cannot process some Stafford loans as MPN loans and others as non-MPN loans). Jenzabar strongly recommends that your institution leave this default blank until you are set up as an MPN school. In addition to defining the LOAN_MPN_DELIVERY_METHOD macro, to complete MPN setup be sure to define the LOAN_MPN_SERIAL_LOAN_CODE macro and to define the Application Code value as M in your Loan Type table entries.

LOAN_MPN_SERIAL_LOAN_CODE

This macro defines the default value for the Master Promissory Note (MPN) Serial Loan code (loan_rec.mpn field). This value is a one-character code indicating how your institution intends to use the Master Promissory Note. Valid codes are:

- Blank
- N (New - use a new Master Promissory Note)

- S (Serial - renew the existing Master Promissory Note)

The standard default of this macro is blank and should be changed only if your institution is currently set up to use MPN Loans. Once your institution is set up as an MPN school you must process all Stafford loans as MPN loans (e.g., you cannot process some Stafford loans as MPN loans and others as non-MPN loans). Jenzabar strongly recommends that your institution leave this default blank until you are set up as an MPN school. You may wish to set this macro to the most common value used by your institution or you may wish to leave it blank and allow the user to select the appropriate value for the selected MPN loan. Once you are ready to certify a selected MPN loan, you are required to enter a value in the loan_rec.mpn field. In addition to defining the LOAN_MPN_SERIAL_LOAN_CODE macro, to complete MPN setup be sure to define the LOAN_MPN_DELIVERY_METHOD macro and to define the Application Code value as M in your Loan Type table entries.

LOAN_OTHR_TOT_CODES

Identifies tot codes for alternative loans (not fully implemented).

LOAN_PLUS_TOT_CODES

Identifies the list of Tot codes for parent loans.

LOAN_RECIPIENT_BRANCH_ID

Unique (4-digit max) ID number receiving files, assigned by entity other than Department of Education.

LOAN_RECIPIENT_ED_BRANCH_ID

The 2-digit ID number assigned by the Department of Education to the branch office receiving the files.

LOAN_RECIPIENT_ID

Unique (6-digit max) ID number assigned to the organization receiving files. For guarantors, this is a 3-digit number as shown in Appendix A of CommonLine documentation. For all other organizations, this is a 6-character number assigned by the Department of Education.

LOAN_RECIPIENT_NAME

Name (32-char max) of recipient of loan origination files.

LOAN_SAME_FILE_EXTENSION

Determines how outbound file names are constructed. If "N" (default), outbound files will have an extension of .001, .002, .003, etc. for the second and subsequent filenames, respectively. If "Y", all files will have the same extension (as determined from the loanfmt_table), and the filename will include 001, 002, 003, etc. for the second and subsequent filenames (not the extension)

LOAN_SCHOOL_BRANCH_ID

Unique (4-digit max) ID number assigned by entity other than Department of Education.

LOAN_SCHOOL_ED_BRANCH_ID

School's 2-digit branch ID assigned by the department of Education.

LOAN_SCHOOL_ID

School's (6-digit max) ID number assigned by the department of ED required in all electronic communications between school and loan origination agency.

LOAN_STAFF_TOT_CODES

Identifies the list of tot codes for Stafford (subsidized) loans. Separate each tot code with a comma (e.g. STAF,STF1,STF2).

LOAN_SUMMARIZE_EFT_DEBIT

During the import of EFT roster files, should the debit side of the resulting G/L transaction represent a summarized amount for all disbursements (the debit side is typically the EFT wire cash account)? If "Y", only one G/L entry is posted with a single debit and one credit for each disbursement in the EFT roster file. If "N", the import process posts one G/L entry for

each disbursement, resulting in several debits to the EFT wire account. For schools that use bank reconciliation to reconcile the EFT wire account, setting this option to "Y" allows for the most straightforward reconciliation--EFT monies are wired to the school in a lump sum single deposit that corresponds to the total amount of the disbursements in an EFT roster file.

LOAN_TABLE_CONTROL_GROUP

Unix group in which a user must have access to enable table option in loan tracking.

LOAN_UNSB_TOT_CODES

Identifies the list of tot codes for Stafford (unsubsidized) loans. Separate each tot code with a comma (e.g. UNSB,UNS1,UNS2).

SECTION 5 – JENZABAR CX PROGRAM FILES

Overview

Introduction

This section provides reference information about the files that relate to most CX programs. By understanding the file structure and the contents of the files, you can locate most of the information you need about any program.

Program Files Detailed

This section contains details about the following files:

def.c

The `def.c` file contains the declaration of external variables (including structures) that must be available to all source files in the program. These variables can also be initialized in this file. As with other C source files, the files also contain comments. The `makedec` command uses the `def.c` file to create the `dec.h` file.

mac.h

The `mac.h` file contains preprocessor include and define statements, typedef statements, and structure template definition statements. The file also contains macro substitution defines and declarations of structures. This file is included in all source files during compilation through use of the `dec.h` file.

Note: All other files for each CX program are standard C programming files with standard components and structure.

Definition File

Every program uses a definition (`def.c`) file, located in `/src` directory path containing the program.

The `def.c` file for a screen-oriented program can contain the following information:

- Includes for a `mac.h` file
- Declaration of global variables and structures used throughout the product
- Structure and non-structure screen binds (i.e., program buffer to screen buffer binds)
- Ring menu definitions
- Prompt line information
- Program parameters
- Declarations of dynamic memory (`dmms`, `dmls`, and `dmlts`) in relation to functionality within `libdmm` (the dynamic memory management package)
- Screen pointers

The `def.c` file for a nonscreen-oriented program can contain the following information:

- Includes for a `mac.h` file
- Global program variables
- Includes for schema files `def.c` files
- Form pointers that provide the location for forms
- `Sqllda` pointers that bind the file structure to the form
- `dmm`, `dml` and `dmlt` definitions
- Program parameters
- Declarations of functions so the compiler can handle a call of that function

Example of a def.c File

The following is an edited excerpt from the def.c file for the Financial aid programs, *faentry* and *faneed*. It illustrates the common components of a standard CX def.c file.

Note: The legend for the file contents follows this illustration.

```
#include "mac.h"
#include <schema/student/aiddef.c>
#include <schema/student/progenrdef.c>

struct bind_type bgt_bind_list[] =
{
  { BGT_SCR, &bgt_scr, "meth", CHARTYPE, (char*)&bgtmeth, SCR_CBIND},
  { BGT_SCR, &bgt_scr, "methtext", CHARTYPE, (char *)&bgttext, SCR_CBIND},
  { BGT_SCR, &bgt_scr, "bgttext", CHARTYPE, (char *)&bgt_desc, SCR_CBIND},
}

/* screen definitions for a ring menu for the faneed screen */
SCR_MENUSTART(need_def)
  SCR_MENUOPT2(0,"Assum",'A',SCR_GMENABLE,"Look at assumptions for a student.",NULL),
  SCR_MENUOPT2(0,"Reject",'R',SCR_GMENABLE,"Look at rejects for a student.",NULL),
  SCR_MENUOPT2(0,"Update need",'U',SCR_GMENABLE,"Update student need section.,"Update"),
  SCR_MENUOPT2(0,"Student",'S',SCR_GMENABLE,"Update student section.",NULL),
  SCR_MENUOPT2(0,"Budget",'B',SCR_GMENABLE,"Display and/or update the Budget screen.",NULL),
  SCR_MENUOPT2(0,"Options",'O',SCR_GMENABLE,"Display and/or update student profile and/or
academic information.",NULL),

/* -----
   prompts for quikmate/characterbase display.
   ----- */

char forward_prompt[30];
char help_prompt[30];
char keyn_prompt[30];
char keyu_prompt[30];

/* parameter buffers */

char print_dev[9]; /* output printer for fps letters */
char intend_schd; /* intended schedule for PELL awards */
char divide[4][2]; /* parameter slash symbol based on nsess */

/* Program variables */
int loanindex; /* used to reference loan scrolling areas */
int loanfound = FALSE; /* T/F if loan records found */
int adr_loaded = FALSE; /* TRUE if adr functions initialized */
```

Legend for the def.c file:

1. mac.h include
2. schema file def.c's
3. screen binds
4. structure definitions
5. parameters

mac.h Files

Every program uses a macro header (mac.h) file, located in the following path:
\$CARSPATH/src/finaid/<program name>.

The *mac.h* file for a screen-oriented program can contain the following information:

- Includes related to system header files
- Includes related to CX library and other product processes
- Includes for schema files mac.h files
- Program constant definitions (i.e., *#define* statements)
- Structure definitions

Example of a mac.h File

The following is an edited excerpt from the mac.h file for *faentry*. It appears here to illustrate the common components of a standard CX mac.h file.

Note: The legend for the file contents follows this illustration.

```
#include <time.h>
#include <ctype.h>
#include <signal.h>
#include <string.h>

#include <schema/admissions/admmac.h>
#include <schema/student/progenrmac.h>

#define ADD_SCR          "accounting/fingen/add"
#define SELECT_SCR      "accounting/fingen/select"
#define BGSF_FORM       "accounting/fingen/bgsf"

/* Compliance checks */

#define CHECK_AWD        'A'
#define CHECK_DISB      'D'
#define CHECK_ALL       'B'          /* Both */

struct dist_type
{
    char    prd[7];          /* fiscal period */
    char    sessyr[7];      /* right justified session value */
    char    sess[5];
    int     yr;
    int     dist[2];
    char    extra[2];
};
```

Legend for the mac.h file:

1. includes for header files
2. includes for schema files
3. program constant definitions
4. structure definitions

SECTION 6 - FINANCIAL AID ENTRY

Overview

Introduction

This section provides reference information about the Financial Aid Entry program. The Financial Aid product uses Financial Aid Entry to allow:

- Fund balance checking
- Aid disbursement checking
- Hold records monitoring
- Manual entering and maintaining of financial aid
- Interactive and batch aid packaging
- Loan processing
- Financial aid posting
- Compliance checking
- Financial Aid transcripts, Award Notice forms, and Cover letters production

Program Features Detailed

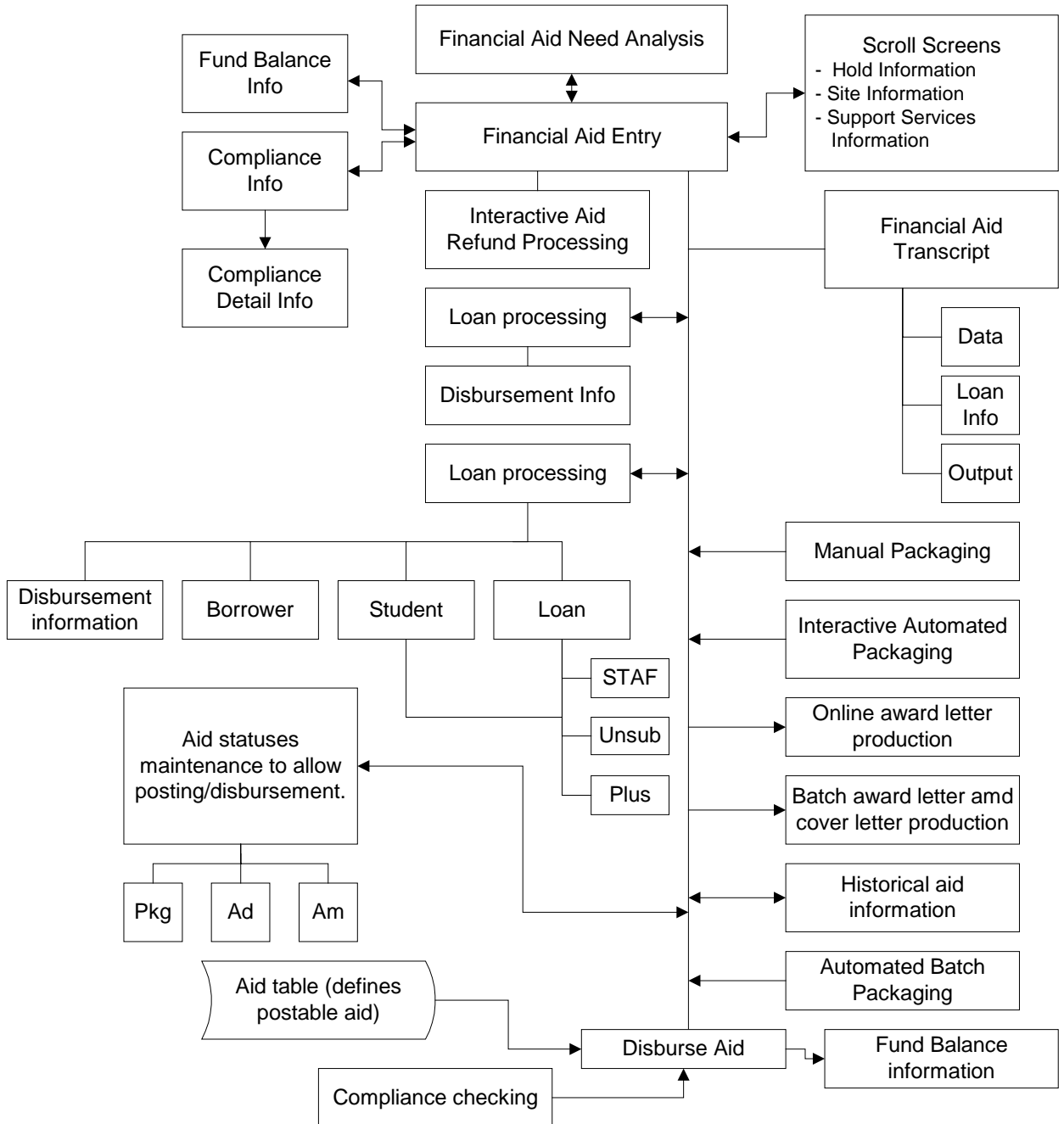
This section contains details about the following features of the Financial Aid program:

- Process flow
- Parameters
- Program screens

Process Flow

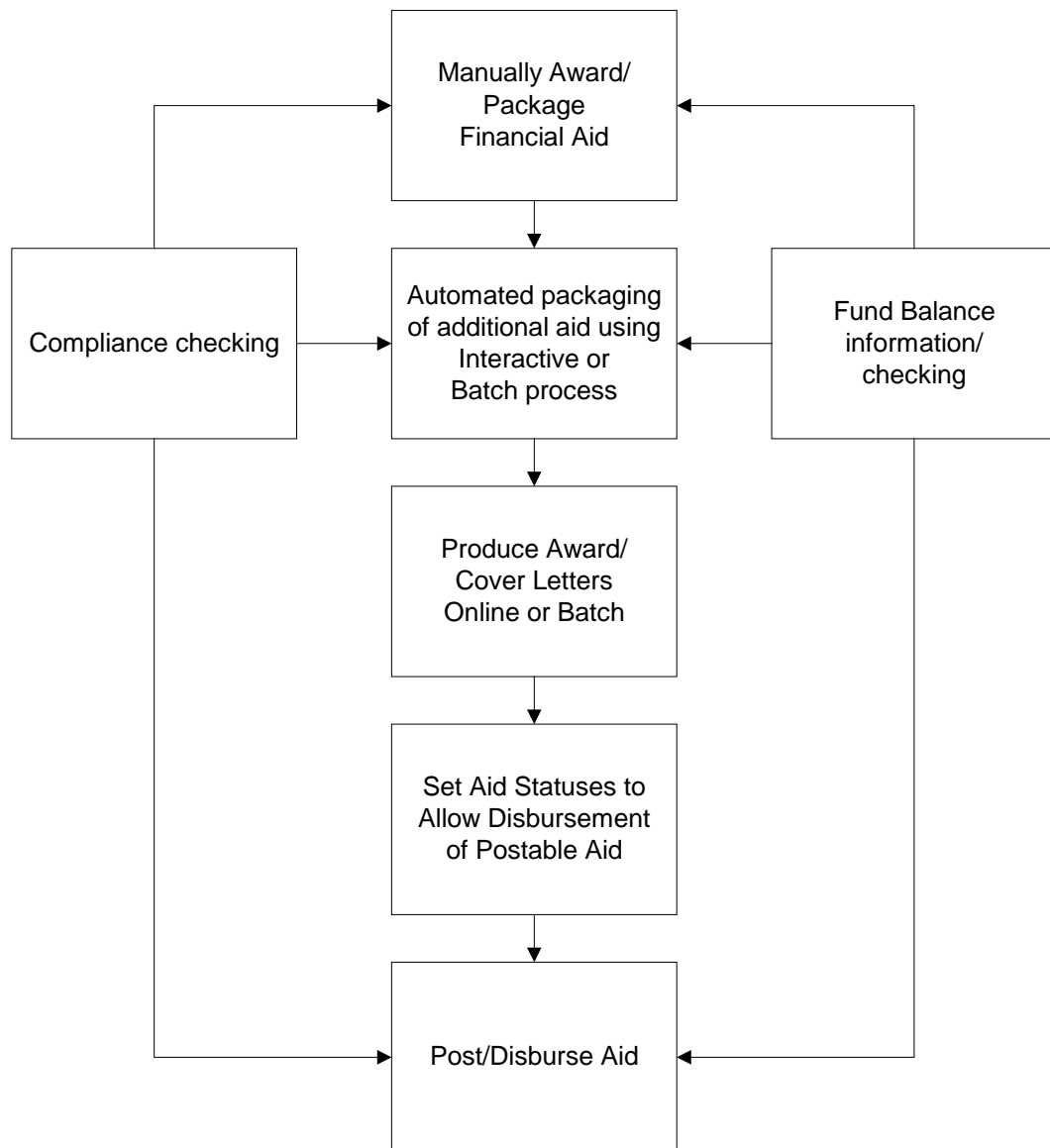
Functional Relationships

The following diagram shows the functional relationships of Financial Aid Entry.



Financial Aid Entry Diagram

The following diagram shows the flow of data in the Financial Aid Entry program.



Data Flow Description

The following describes the data flow in the Financial Aid Entry program.

1. The user uses Financial Aid Entry manually to enter and package awards to students.
Note: The user also performs compliance and fund balance information checking.
2. The user uses Financial Aid Entry to perform automated packaging of students' awards. The user can use interactive screens or the batch process.
Note: The user also performs compliance and fund balance information checking.
3. The user creates award notices and cover letters using Financial Aid Entry interactive commands or the batch process.

4. To allow for disbursement of aid to students, the user sets the students' aid status codes appropriately and ensures that the students meet compliance.

Note: The Aid table defines those aid codes that can be posted.

5. The user posts and/or disburses aid to students' accounts.

Note: The system also performs compliance and fund balance checking. The user may obtain information on compliance and/or fund balance information for any aid code.

Financial Aid Packaging Processing

Packaging Processing Methodology

The Financial Aid Packaging process uses a *best fit* methodology with table-driven calculations to determine the composition of a student's financial aid package. Your institution's packaging objectives and the allowable range of the awards (minimum, maximum, and percentage of variance) applied to the student's amounts of need determine the best fit solution.

In deciding which financial aid to package, Financial Aid Packaging can validate aid compliance and fund balance restrictions. Before awarding a student's aid, Financial Aid Packaging can perform compliance validation to ensure that the student meets the institution's compliance requirements.

Compliance Checking

The Financial Aid Packaging process can verify that students meet the institution's compliance requirements, defined in the Financial Aid Compliance tables. Automatic compliance checking occurs when the system awards and/or posts financial aid. When a student does not meet compliance for a specific financial aid, Financial Aid Packaging does not package that specific financial aid for the student.

Note: Financial Aid Packaging processes compliances by exception; when no compliance standard is associated to an aid code, the system assumes automatic compliance.

Enrollment Status Packaging

Financial Aid Packaging contains a feature that calculates packaging simulations for four different enrollment statuses, including:

- Full-time
- 3/4 time
- 1/2 time
- Less than 1/2 time

Note: The above values exist in the Financial Aid Budget and Budget Group tables.

When the feature `ENABLE_FEAT_MULTIPKG` is enabled, Financial Aid Entry automatically creates the four packaging simulations for a student. Financial Aid Entry determines the student's enrollment status for the active session in two ways:

- If the student is not registered for the session, the system uses the enrollment status in the student's active budget, which you specify in the Need Analysis program.
- If the student is registered for the session, the system determines the student's enrollment status by the number of hours in which the student is registered.

Automatic Recalculation of Financial Aid Awards

After you award financial aid to a student, the system determines the actual award amount based upon the active budget prior to registration and actual hours after the student registers. The actual amount that the student receives depends on the student's actual enrollment hours and the particulars for which the award(s) pays. For example, if the student has a full time registration (\$1200) and his aid only pays for tuition (\$850), the system awards \$850 of the \$1200 total, and the system will either:

- Return the remainder of the award to the fund account
- Keep track of how much tuition has been paid (if the student is to receive the remainder of the award)

Note: To set up this feature, you must enable the ENABLE_FEAT_MULTIPKG macro. You must also set up system tables to define the actions of the automatic recalculation processing.

Compliance Checking

Introduction

Compliance testing criteria looks at data in individual student records and uses a specified test to see if a student meets the compliance test. Financial Aid Entry performs two types of compliance testing:

- The first is to check if the student complies with the requirements for receiving an award
- The second is to check if the student passes the compliance requirements allowing the award to be disbursed

Financial Aid Entry can perform compliance testing on every student receiving any type of aid, on an individual aid basis, or on every aid belonging to an aid funding source. The program *cannot* perform compliance checking for aids that do not have any compliance requirements defined in the tables.

Types of Compliance

The Financial Aid product tests students' records for the following types of compliance:

- All (everyone receiving any type of aid award must meet)
- Aid code specific (e.g., Pell, SEOG)
- Fund/source specific (all aid codes with this source must meet the same requirements)

Categories of Compliance Requirements

Compliance requirements fall into two categories:

- The first are requirements that must be met for a student to be awarded a financial aid.
- The second are requirements that must be completed for an award to be disbursed to a student's account.

Therefore, for Financial Aid Entry to award an aid, a student must have each award requirement completed to get the award. Before disbursement can take place, each requirement necessary for disbursement must be completed. Manual awarding allows you to override compliance that must be met for awarding.

Passing Compliance Testing

Generally, for an aid to pass a compliance test on a student, each requirement must be completed (AND conditions between requirements), and at least one sequence must be completed (OR condition between sequence numbers) for each requirement. For a sequence to be completed, each criteria test must be passed. This relationship allows more flexibility in defining compliance tests. An exception to this occurs when a student is allowed to attend more than one site within a school system. At this point, the criteria test may only need to be passed at one site for compliance to be met.

Financial Aid Entry Parameters

Introduction

CX contains parameters and compilation values for executing the Financial Aid program. You can specify parameters to compile Financial Aid Entry in a specified manner at the time of execution. The Financial Aid Entry program source coding performs multiple functions, for example: Financial Aid Entry applications, disbursement of aid, and creation of award letters.

Note: You can also specify compilation values with the includes for the Financial Aid product that affect the Financial Aid Entry program.

Parameter Syntax

The following lists the methods of running the Financial Aid Entry program from the UNIX shell. The individual parameters specified in each method are described in *Parameters*, which follows this list.

Note: Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

To operate in normal interactive mode:

Usage: faentry -l subs [-D display only, -v verify compliance]

Example: faentry -l S/A -v

To post financial aid in up to 4 sessions:

Usage: faentry -y year -l subs -s session(s) -p prog -d -a [-F, -j date, -i ignore pkgstat]

Example: faentry -y 9697 -l S/A -s FA96 -p UNDG -d -a -F, -j 053196, -i ignore pkgstat

To select and format award notices:

Usage: faentry -y year -l subs -s session(s) -c current sess -f form -r return date

Example: faentry -y 9697 -l S/A -s FA96 SP97 -c SP97 -f anform -r 053196

To print Student Compliance Audit:

Usage: faentry -y year -l subs -p prog -s session(s) -o output [-v A,D, or B]

Example: faentry -y 9697 -l S/A -p UNDG -s FA96 -o audit.out -v B

To operate using Background (Batch) Packaging:

Usage: faentry -y year -l subs -s session(s) -p prog -P pkgcode

Example: faentry -y 9697 -l S/A -s FA96 SP97 -p UNDG -P SIM

Parameters

The following lists the parameters for running Financial Aid Entry.

-a

Required - Specifies that Financial Aid Entry post all financial aid awards regardless of the posting status value (stufa_pst_stat) in the stufa_rec. The program posts an ASCII file.

Example: faentry -y 9697 -l S/A -s FA96 -p UNDG -d -a

-A runcode

Optional - Specifies an ADR run code where *runcode* represents the code you specify.

Example: faentry -A SINGLEI -l S/A -v

-c current session

Required - Specifies a session code where *current session* represents the code you specify.

Example: faentry -y 9697 -l S/A -s FA96 SP97 -c **SP96** -f entry -r 053196

-d

Required - Specifies that Financial Aid Entry will disburse aid for students who have a posting status value (stufa_pst_stat) equal to Y.

Example: faentry -y 9697 -l S/A -s FA96 SP97 -p UNDG -d -a

-D

Optional - Specifies access to Financial Aid Entry in display-only mode.

Example: faentry -l S/A -D

-f form

Required - Specifies a specific award notification form to display where *form* represents the form name.

Example: faentry -y 9697 -l S/A -s FA96 -c SP96 -f **aidpkg** -r 053196

-F

Optional - Specifies for Financial Aid Entry to run the filepost program to post the ASCII file created for posting financial aid.

Example: faentry -y 9697 -l S/A -s FA96 -p UNDG -d -a -F

-j date

Optional - Specifies a journal date where *date* represents the date you specify indicating the date to be entered in the journal as the effective posting date.

Example: faentry -y 9697 -l S/A -s FA96 -p UNDG -d -a -j **053196**

-i ignore pkgstat

Optional - Specifies that the Financial Aid Entry posting process will ignore a package status of *pending*.

Example: faentry -y 9697 -l S/A -s FA96 -p UNDG -d -a -i

-I number

Optional - Specifies an ADR address used by a specific ID number where *number* represents the number you specify.

Example: faentry -l S/A -s FA96 SP97 -p UNDG -v -I 400004

-l subs

Required - Specifies a subsidiary ledger where *subs* represents the code you specify (e.g., S/A for Student Accounts).

Example: faentry -l S/A

-L cur_site

Optional - Specifies the site in which you are running Financial Aid Entry where *cur_site* represents the site code you specify (e.g., main for main campus).

Example: faentry -l S/A -L main

-o output

Required - Specifies that Financial Aid Entry produce a background compliance report ASCII file, where *output* represents the filename you specify.

Example: faentry -y 9697 -l S/A -p UNDG -s FA96 -o **cplyaudit.out**

-p prog

Required - Specifies the academic program in which to process financial aid where *prog* represents the code you specify.

Example: faentry -y 9697 -l S/A -s FA96 -p **UNDG** -d -F, -j 053196

-P pkgcode

Required - Specifies a packaging code where *pkgcode* represents the code you specify. The background/batch packaging process uses this parameter.

Example: faentry -y 9697 -l S/A -s FA96 -p **UNDG -P SIM**

-r return date

Required - Specifies a return date to be printed on an award notice form where *return date* represents the date that you want the student to return the form to your office.

Example: faentry -y 9697 -l S/A -s FA96 SP97 -c FA96 -f ANFORM -r **053197**

-s session(s)

Required - Specifies the sessions in which to process financial aid where *session(s)* represents the session(s) you specify.

Example: faentry -y 9697 -l S/A -s **FA96 SP97** -p UNDG -d -a

-v A, D, or B

Optional - Specifies that Financial Aid Entry verifies a student's compliance and where:

- A means that compliance must be met to be awarded;
- D means that compliance must be met to be disbursed
- B means both A and D.

Example: faentry -l S/A -y 9697 -s FA96 SP97 -p UNDG -v **B**

-y fayr

Required - Specifies the financial aid award year in which to process where *fayr* represents the code you specify.

Example: faentry -y **9697** -l S/A -s FA96 -c SP96 -f entry -r 053196

Program Screens

Purpose

Financial Aid Entry has 16 screens and 4 forms for performing the following interactive functions:

- Entering/updating awards
- Performing Compliance checking
- Packaging Financial Aid
- Viewing Award Disbursements
- Viewing Fund Balances
- Creating Financial Aid Transcripts
- Setting Program Parameters

Access

The screen files for Financial Aid Entry are located in the following directory paths:

- \$CARSPATH/src/finaid/faentry/SCR
- \$CARSPATH/modules/finaid/progscr/faentry

The form files for Financial Aid Entry are located in the following directory path:

- \$CARSPATH/modules/finaid/forms/faentry

Screen Files and Table/Record Usage

The Financial Aid Entry screens appear in the following files and use the indicated tables and records.

aidttl

Contains the Aid By Enrollment Status List screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_rec, aid_table, aidttl_rec, aidttl_table, faschd_table

aidhelp

Contains the Financial Aid Help screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

aidpkg

Contains the Packaging Detail screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faneed_rec, faschd_table, stufa_rec

awddisb

Contains the Award Disbursements screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: id_rec, stufa_rec

cply

Contains the Compliance Requirements screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, id_rec

cplydtl

Contains the Compliance Detail Information screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, id_rec

entry

Contains the main Financial Aid Entry screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, faneed_rec, id_rec, stufa_rec

entry2

Contains the main Financial Aid Entry screen.

Note: This screen displays only two aid sessions with the description of the aid code scrolled with the aid. If your institution does not use this screen format, move it to entry and be sure to define PR_LINE_DESC in faentry/mac.h.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faneed_rec, id_rec, stufa_rec

fabal

Contains the Current Fund Balances screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, aidpkg_table

faloan

Contains the Financial Aid Transcript Loan History screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faloan_rec, id_rec

fasite

Contains the Site Record screen.

Access: \$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: site_rec

fatran

Contains the Financial Aid Transcript Information screen.

Access: \$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: fatran_rec, id_rec

hold

Contains the Holds detail window.

Access: \$CARSPATH/modules/Lib/progscr/libentry

listpkg

Contains the Packaging Methods pop-up window.

Access: \$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: pkg_table

parms

Contains the Financial Aid Entry Program Parameters screen.

Access: \$CARSPATH/modules/finaid/progscr/faentry

pkgobj

Contains the Packaging Objectives screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faneed_rec, faschd_table, id_rec, stufa_rec

stathelp

Contains the Financial Aid Statuses Help screen.

Access: \$CARSPATH/src/finaid/faentry/SCR

svc

Contains the Support Services detail window.

Access: \$CARSPATH/modules/Lib/progscr/libentry

Forms Files and Table/Record Usage

The Financial Aid Entry forms appear in the following files and use the indicated tables and records.

anform

Contains a sample Financial Aid Award Letter form.

Access: \$CARSPATH/modules/finaid/forms/faentry

Tables/Records: fa_item_table, id_rec

awdtst

Contains a sample Financial Aid Award Letter form.

Access: \$CARSPATH/modules/finaid/forms/faentry

Tables/Records: id_rec

fatran

Contains the Financial Aid Transcript form.

Access: \$CARSPATH/modules/finaid/forms/faentry

Tables/Records: faloan_rec, fatran_rec, id_rec

I_anfi

Contains a sample Financial Aid Award Letter form.

Access: \$CARSPATH/modules/finaid/forms/faentry

Tables/Records: id_rec

Satisfactory Academic Progress

Introduction

The Financial Aid Satisfactory Academic Progress (*fasap*) program provides the ability to track and report on the academic progress of financial aid recipients.

Parameter Syntax

You can display Financial Aid Satisfactory Academic Progress parameters by entering the following: **fasap -**,

The following is the correct usage for running the Financial Aid Satisfactory Academic Progress program from the UNIX shell:

```
fasap -r resource -t tickler -c criteria -y fayr -s session [-p SAP pass]
[-f SAP fail] [-P prog] -T track -Y year [-L site] [-A]
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running Financial Aid Satisfactory Academic Progress.

-A

Optional - Specifies that the process will perform actions instead of compliance.

Example: fasap -r SAPACTN -t FY96 -y 9697 -T finaid -Y 1996 -s fa96 -Y 1997 -s sp97 -c APYE **-A**

-c compliance criteria code

Required - Specifies the compliance code (e.g., APYE for Academic) used to check students with the specified *resource* contact.

Example: fasap -r SAPACTN -t FY96 **-c APYE** -y 9697 -s fa96 -Y 1996 -T finaid

-f SAP fail

Optional - Specifies the SAP code to use if the criteria fails.

Example: fasap -r SAPACTN -t FY96 -y 9697 -Y 1996 -s fa96 -Y 1997 -s sp97 -c APYE **-f code** -T finaid

-L site

Optional - Used to specify your site.

Example: fasap -r SAPACTN -t FY96 -c APYE -y 9697 -s fa96 -T finaid -Y 1996 **-L main**

-P prog

Optional - Specifies the program (e.g., UNDG for Undergraduate)

Example: fasap -r SAPACTN -t FY96 -y 9697 -Y 1996 -s fa96 -Y 1997 -s sp97 -c APYE **-P UNDG** -T finaid

-p SAP pass

Optional - Specifies the SAP code to use if the criteria passes.

Example: fasap -r SAPACTN -t FY96 -y 9697 -Y 1996 -s fa96 -Y 1997 -s sp97 -c APYE **-p code** -T finaid

-r resource

Required - Specifies the resource code (e.g., SAPACTN) of the contact used to select students.

Example: fasap -r **SAPACTN** -t FY96 -c APYE -y 9697 -s fa96 -Y 1996 -T finaid

-s session

Required - Specifies the session for checking satisfactory academic progress.

Example: fasap -r SAPACTN -t FY96 -c APYE -y 9697 -s **fa96** -Y 1996 -T finaid

-t tickler

Required - Specifies the tickler value (e.g., FY96) of the contact used to select students.

Example: fasap -r SAPACTN -t **FY96** -c APYE -y 9697 -s fa96 -Y 1996 -T finaid

-T track

Required - Specifies the track (e.g., finaid or regist) to be processed.

Example: fasap -r SAPACTN -t FY96 -c APYE -y 9697 -s fa96 -Y 1996 -T **finaid**

-y fayr

Required - Specifies the Financial Aid Award Year code (e.g., 9697).

Example: fasap -r SAPACTN -t FY96 -c APYE -y **9697** -s fa96 -Y 1996 -T finaid

-Y year

Required - Used to specify the year for checking satisfactory academic progress.

Example: fasap -r SAPACTN -t FY96 -c APYE -y 9697 -s fa96 -T finaid -Y **1996**

SECTION 7 - FINANCIAL AID NEED ANALYSIS

Overview

Introduction

This section provides reference information about the Financial Aid Need Analysis program. The Financial Aid Need Analysis program allows you to enter and maintain financial aid need analysis information.

Program Features Detailed

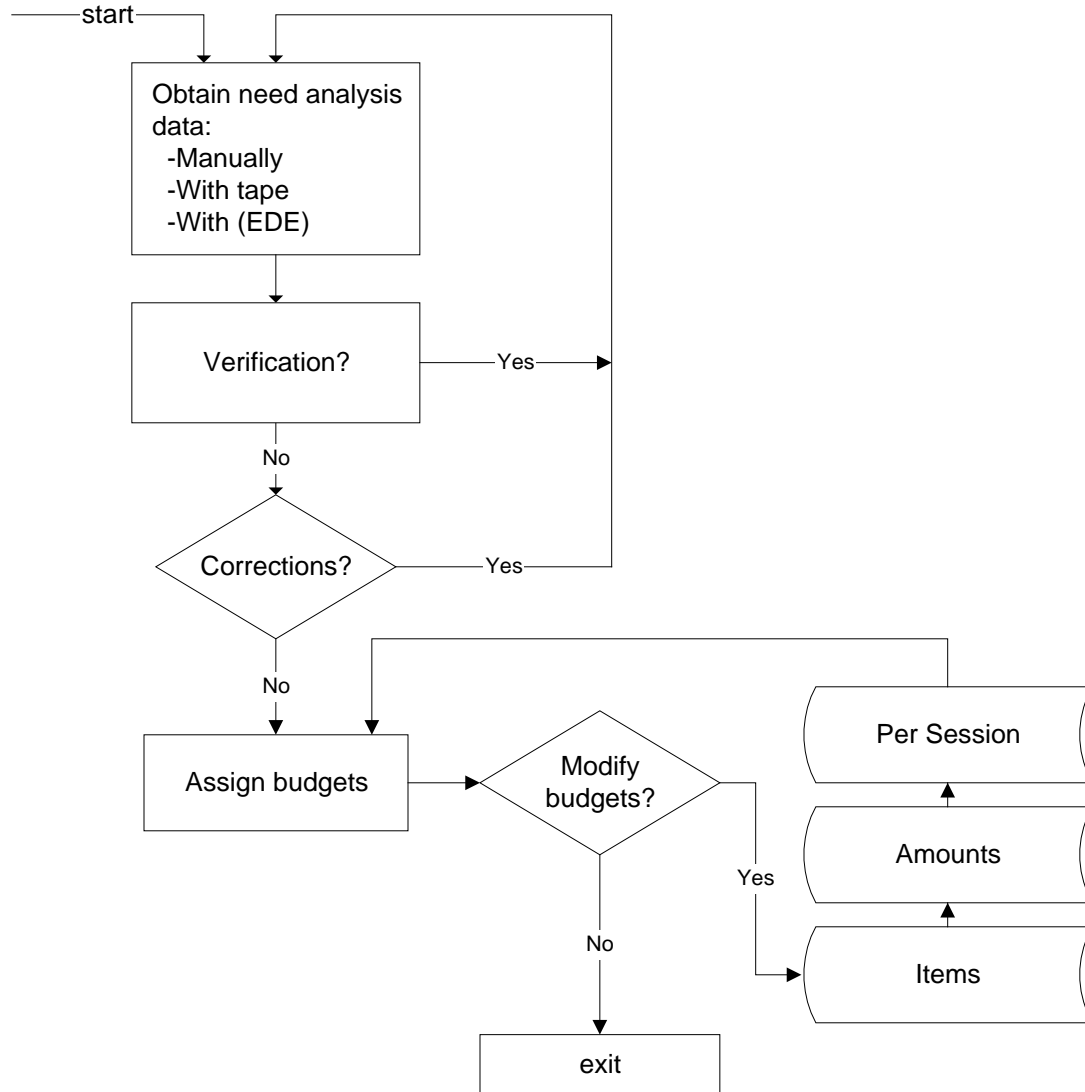
This section contains details about the following features of the Financial Aid program:

- Process flow
- Parameters
- Program screens

Process Flow

Diagram

The following diagram shows the flow of data in the Financial Aid Need Analysis program.



Data Flow Description

The following describes the data flow in the Financial Aid Need Analysis program.

1. The user loads need analysis data into CX via:
 - Manual entry
 - Tape
 - EDE
2. The user performs verification procedures to determine students' eligibility for financial aid, as necessary.
3. The user makes corrections to the need analysis data, as necessary.

4. The user assigns budgets for financial aid to students.
5. The user makes changes to the students' budgets as necessary.

Financial Aid Need Analysis Parameters

Introduction

CX contains parameters and compilation values for executing the Financial Aid Need Analysis program. You can specify parameters to compile Financial Aid Need Analysis in a specified manner at the time of execution.

Note: You can also specify compilation values with the includes for the Financial Aid product that affect the Financial Aid Need Analysis program.

Parameter Syntax

You can display Financial Aid Need Analysis parameters by entering the program's name and an invalid parameter, such as the following: **faneed -**,

The following is the correct usage for running the Financial Aid Need Analysis program from the UNIX shell:

```
faneed -y fayr [-l ledger -s session -p program -c background -f -m method -i id range]
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running Financial Aid Need Analysis.

-c background

Optional - Specifies that Need Analysis calculates need in background mode. CX uses this parameter for internal testing purposes.

Example: faneed -y 9899 -c

-f

Optional - Specifies a file parameter for reading a group of ID numbers from stdin. CX uses this parameter for internal testing purposes.

Example: faneed -y 9899 -f < file

-i ID range

Optional - Specifies a range of ID numbers for need analysis processing where *ID range* represents the ID numbers you specify. CX uses this parameter for internal testing purposes.

Example: faneed -y 9899 -i 101 2309

-l ledger

Optional - Specifies a Subsidiary Ledger code where *ledger* represents the ledger you specify (e.g., S/A for Student Accounts).

Example: faneed -y 9899 -l S/A

-L site

Optional - Specifies the site in which you are running Financial Aid Need Analysis, where *site* represents the code you specify.

Example: faneed -y 9899 -L main

-m method

Optional - Specifies method(s) to be used in calculations where *method* represents the code you specify (e.g., FM for Federal Methodology) . CX uses this parameter for internal testing purposes.

Example: faneed -y 9899 -m fm

Note: This parameter can only be used in conjunction with the -c parameter.

-o output

Optional - Specifies that Financial Aid Need Analysis produces an ASCII file containing corrections where *output* represents the file format. Currently, the program produces the file only in the GES (General Electronic Support) format.

Example: faneed -y 9899 -o GES

-O output

Optional - Specifies that Financial Aid Need Analysis produces an ASCII file containing original products where *output* represents the file format. Currently, the program produces the file only in the GES (General Electronic Support) format.

Example: faneed -y 9899 -O GES

-p program

Optional - Specifies ptp communications with Financial Aid Need Analysis where *program* represents the program name you specify.

Example: faneed -y 9899 -p faentry

-s session

Optional - Specifies the session in which to process financial aid need analysis where *session* represents the session you specify.

Example: faneed -y 9899 -s FA96

-y fayr

Required - Specifies a Financial Aid Award year where *fayr* represents the code you specify.

Example: faneed -y 9899

Program Screens

Purpose

Financial Aid Need Analysis has 32 screens and 26 forms for performing the following interactive functions:

- Budgeting for Financial Aid
- Need Analysis
- Viewing profile, program enrollment, and academic information
- Calculating available income and estimated family contribution
- Entering a financial aid application form

Access

The screen files for Financial Aid Need Analysis are located in the following directory paths:

- \$CARSPATH/src/finaid/faneed/SCR
- \$CARSPATH/modules/finaid/progscr/faneed

The form files for Financial Aid Need Analysis are located in the following directory paths:

- \$CARSPATH/modules/finaid/forms/faneed
- \$CARSPATH/modules/finaid/progscr/0102

Note: Financial Aid product forms are located in the \$CARSPATH/modules/finaid/progscr directory in subdirectories that pertain to the financial aid award year. The 0102 directory contains the most current versions of the forms.

Screen Files and Table/Record Usage

The Financial Aid Need Analysis screens appear in the following files and use the indicated tables and records.

Note: Several screen files used in prior years also appear in the Financial Aid Need Analysis program screen directories. These screen files are not specifically listed below.

95reject1

Contains the first 1995-96 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

95reject2

Contains the second 1995-96 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

96reject1

Contains the first 1996-97 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

96reject2

Contains the second 1996-97 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

97reject1

Contains the first 1997-98 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

97reject2

Contains the second 1997-98 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

97reject3

Contains the third 1997-98 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

98reject1

Contains the first 1998-99 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

98reject2

Contains the second 1998-99 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

98reject3

Contains the third 1998-99 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

99reject1

Contains the first 1999-2000 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

99reject2

Contains the second 1999-2000 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

99reject3

Contains the third 1999-2000 U.S.E.D. Reject Codes And Reasons screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

adm

Contains display-only Admission record information.

Access: \$CARSPATH/modules/Lib/progscr/libentry

bgt

Contains the upper portion of the Financial Aid Budgeting screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fabgt_rec, fabgt_table, fameth_table, id_rec

bgtctl

Contains the Item List screen. Financial Aid Need Analysis uses this screen for detail budget editing. The screen is accessed by the budget logic in Financial Aid Need Analysis.

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: fa_item_table, fabgtctl_rec

copy

Contains the Copy Command pop-up window used by the Copy command in the Need Analysis program.

Access: \$CARSPATH/src/finaid/faneed/SCR

esartran

Contains the ISIR (formerly, ESAR) Student Transaction screen, which allows access to ISIR transaction records.

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: esar_rec

faedit

Contains the Assumption screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

Contains the Site Record screen.

Access: \$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: site_rec

fastat

Contains the Site Record screen.

Access: \$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: site_rec

need

Contains the Need Analysis Information and Budget/Need Summary screens, used for 9293 and earlier. If using student asset, student income, other resource 1, or other resource 2 values on the need screen, use the following naming rules:

<u>Field Value</u>	<u>Scroll Group Name</u>
student asset	sa
student income	si
other resource 1	o1
other resource 2	o2

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: fabgt_table, faneed_rec, id_rec, naf_rec, stufa_rec

need2

Contains the Need Analysis Information and Budget/Need Summary screens used for 9394 and greater years processing. If using student asset, student income, other resource 1, or other resource 2 values on the need screen, use the following naming rules:

<u>Field Value</u>	<u>Scroll Group Name</u>
student asset	sa
student income	si
other resource 1	o1
other resource 2	o2

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: bgtgrp_table, fabgt_table, faneed_rec, id_rec, immeth_table, naf_rec, stufa_rec

norec

Contains the screen used to display the message that no records have been found for the selected student for the scroll records associated with the Options command.

Access: \$CARSPATH/modules/finaid/progscr/faneed

param

Contains the Need Analysis Program Parameters screen.

Access: \$CARSPATH/src/finaid/faneed/SCR

profile

Contains the Profile Information screen for displaying a student's profile information. The screen is used in conjunction with the Options command.

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: profile_rec

progenr

Contains the Program Enrollment Information screen for displaying a student's program enrollment information. The screen is used in conjunction with the Options command.

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: prog_enr_rec

rtfc

Contains the Available Income And Total Family Contribution Summary For 9-Month EFC screen, which is accessed with the Detail command.

Access: \$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fameth_table, fana_rec, id_rec, stufa_rec,

sap

Contains the Satisfactory Academic Process information for adding, modifying, and displaying the student's SAP status.

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: sap_rec

stuacad

Contains the Student Academic Information screen for displaying a student's academic information.

Access: \$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: stu_acad_rec

stuserv

Contains display-only Student Services record information.

Access: \$CARSPATH/modules/Lib/progscr/libentry

stustat

Contains display-only Student Statistics record information.

Access: \$CARSPATH/modules/Lib/progscr/libentry

tfc1

Contains the Available Income screen. *This screen is not currently in use.*

Access: \$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fameth_table, fana_rec, id_rec, naf_rec

tfc2

Contains the Total Family Contribution Summary screen. *This screen is not currently in use.*

Access: \$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fameth_table, fana_rec, id_rec, naf_rec,

Form Files and Table/Record Usage

The Financial Aid Need Analysis forms appear in the following files and use the indicated tables and records.

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: fameth_table, fana_rec, faneed_rec, id_rec, naf_rec, stufa_rec

97esar

Contains the 1997-98 Unofficial Institutional Student Information Report form (formerly, the Electronic Student Aid Report form).

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: fameth_table, fana_rec, faneed_rec, id_rec, naf_rec, stufa_rec

98esar

Contains the 1998-99 Unofficial Institutional Student Information Report form (formerly, the Electronic Student Aid Report form).

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: fameth_table, fana_rec, faneed_rec, id_rec, naf_rec, stufa_rec

99esar

Contains the 1999-2000 Unofficial Institutional Student Information Report form (formerly, the Electronic Student Aid Report form).

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: fameth_table, fana_rec, faneed_rec, id_rec, naf_rec, nslds_rec, stufa_rec

00esar

Contains the 2000-01 Unofficial Institutional Student Information Report form (formerly, the Electronic Student Aid Report form).

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: fameth_table, fana_rec, faneed_rec, id_rec, naf_rec, nslds_rec, stufa_rec

01esar

Contains the 2001-02 Unofficial Institutional Student Information Report form (formerly, the Electronic Student Aid Report form).

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: fameth_table, fana_rec, faneed_rec, id_rec, naf_rec, nslds_rec, stufa_rec

98nslds

Contains the 1998-99 Unofficial National Student Loan Data sheet.

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: naf_rec, nslds_rec, nsldsprog_rec

99nslds

Contains the 1999-2000 Unofficial National Student Loan Data sheet.

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: naf_rec, nslds_rec, nsldsprog_rec

00nslds

Contains the 2000-01 Unofficial National Student Loan Data sheet.

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: naf_rec, nslds_rec, nsldsprog_rec

01nslds

Contains the 2001-02 Unofficial National Student Loan Data sheet.

Access: \$CARSPATH/modules/finaid/forms/faneed

Tables/Records: naf_rec, nslds_rec, nsldsprog_rec

Financial Aid Application Form Files and Table/Record Usage 1997-1998

The Financial Aid Application form files for the 1997-1998 financial aid award year appear in the following files and use the indicated tables and records.

afsa1 through afsa10

Contain the screens of information for the Free Application for Federal Student Aid format.

Access: \$CARSPATH/modules/finaid/progscr/9798

Tables/Records: id_rec, naf_rec

faf1 through faf5

Contain the screens of information for the College Scholarship Service, CSS. The screens do *not* contain all of the data from the CSS Profile product.

Access: \$CARSPATH/modules/finaid/progscr/9798

Access: id_rec, naf_rec

im1 through im5

Contain the screens for Institutional Methodology need analysis information.

Access: \$CARSPATH/modules/finaid/progscr/9798

Tables/Records: id_rec, naf_rec

sim1 through sim2

Contains the screens for Need Analysis Simulation for student data.

Access: \$CARSPATH/modules/finaid/progscr/9798

Tables/Records: id_rec, naf_rec, stufa_rec

ver1 through ver3

Contains the screens for the verification items used in conjunction with the Need Analysis program.

Access: \$CARSPATH/modules/finaid/progscr/9798

Tables/Records: fm_rec, id_rec, naf_rec

Financial Aid Application Form Files and Table/Record Usage 1998-1999

The Financial Aid Application form files for the 1998-1999 financial aid award year appear in the following files and use the indicated tables and records.

afsa1 through afsa10

Contain the screens of information for the Free Application for Federal Student Aid format.

Access: \$CARSPATH/modules/finaid/progscr/9899

Tables/Records: id_rec, naf_rec

im1 through im5

Contain the screens for Institutional Methodology need analysis information.

Access: \$CARSPATH/modules/finaid/progscr/9899

Tables/Records: id_rec, naf_rec

sim1 through sim2

Contains the screens for Need Analysis Simulation for student data.

Access: \$CARSPATH/modules/finaid/progscr/9899

Tables/Records: id_rec, naf_rec, stufa_rec

ver1 through ver3

Contains the screens for the verification items used in conjunction with the Need Analysis program.

Access: \$CARSPATH/modules/finaid/progscr/9899

Tables/Records: fm_rec, id_rec, naf_rec

Financial Aid Application Form Files and Table/Record Usage 1999-2000

The Financial Aid Application form files for the 1999-2000 financial aid award year appear in the following files and use the indicated tables and records.

afsa1 through afsa10

Contain the screens of information for the Free Application for Federal Student Aid format.

Access: \$CARSPATH/modules/finaid/progscr/9900

Tables/Records: id_rec, naf_rec

im1 through im5

Contain the screens for Institutional Methodology need analysis information.

Access: \$CARSPATH/modules/finaid/progscr/9900

Tables/Records: id_rec, naf_rec

sim1 through sim2

Contains the screens for Need Analysis Simulation for student data.

Access: \$CARSPATH/modules/finaid/progscr/9900

Tables/Records: id_rec, naf_rec, stufa_rec

ver1 through ver3

Contains the screens for the verification items used in conjunction with the Need Analysis program.

Access: \$CARSPATH/modules/finaid/progscr/9900

Tables/Records: fm_rec, id_rec, naf_rec

Financial Aid Application Form Files and Table/Record Usage 2000-2001

The Financial Aid Application form files for the 2000-2001 financial aid award year appear in the following files and use the indicated tables and records.

afsa1 through afsa10

Contain the screens of information for the Free Application for Federal Student Aid format.

Access: \$CARSPATH/modules/finaid/progscr/0001

Tables/Records: id_rec, naf_rec

im1 through im5

Contain the screens for Institutional Methodology need analysis information.

Access: \$CARSPATH/modules/finaid/progscr/0001

Tables/Records: id_rec, naf_rec

sim1 through sim2

Contains the screens for Need Analysis Simulation for student data.

Access: \$CARSPATH/modules/finaid/progscr/0001

Tables/Records: id_rec, naf_rec, stufa_rec

ver1 through ver2

Contains the screens for the verification items used in conjunction with the Need Analysis program.

Access: \$CARSPATH/modules/finaid/progscr/0001

Tables/Records: fm_rec, id_rec, naf_rec

Financial Aid Application Form Files and Table/Record Usage 2001-2002

The Financial Aid Application form files for the 2001-2002 financial aid award year appear in the following files and use the indicated tables and records.

afsa1 through afsa10

Contain the screens of information for the Free Application for Federal Student Aid format.

Access: \$CARSPATH/modules/finaid/progscr/0102

Tables/Records: id_rec, naf_rec

im1 through im5

Contain the screens for Institutional Methodology need analysis information.

Access: \$CARSPATH/modules/finaid/progscr/0102

Tables/Records: id_rec, naf_rec

sim1 through sim2

Contains the screens for Need Analysis Simulation for student data.

Access: \$CARSPATH/modules/finaid/progscr/0102

Tables/Records: id_rec, naf_rec, stufa_rec

ver1 through ver2

Contains the screens for the verification items used in conjunction with the Need Analysis program.

Access: \$CARSPATH/modules/finaid/progscr/0102

Tables/Records: fm_rec, id_rec, naf_rec

SECTION 8 - ELECTRONIC DATA EXCHANGE

Overview

Introduction

This section provides reference information about the EDE process. The Financial Aid product uses the EDE process to link institutions with the Central Processing System (CPS) of the Department of Education. EDE allows institutions to obtain, change, and report federal student aid application data and Pell Grant payment data electronically.

The CX Pell RFMS (formerly EDE/Pell) process is a separate process from the CX Electronic Data Exchange (EDE) process. Pell RFMS and EDE share only the PC download process. For more information on the Pell RFMS process, see the *Pell RFMS* section in this manual.

Program Features Detailed

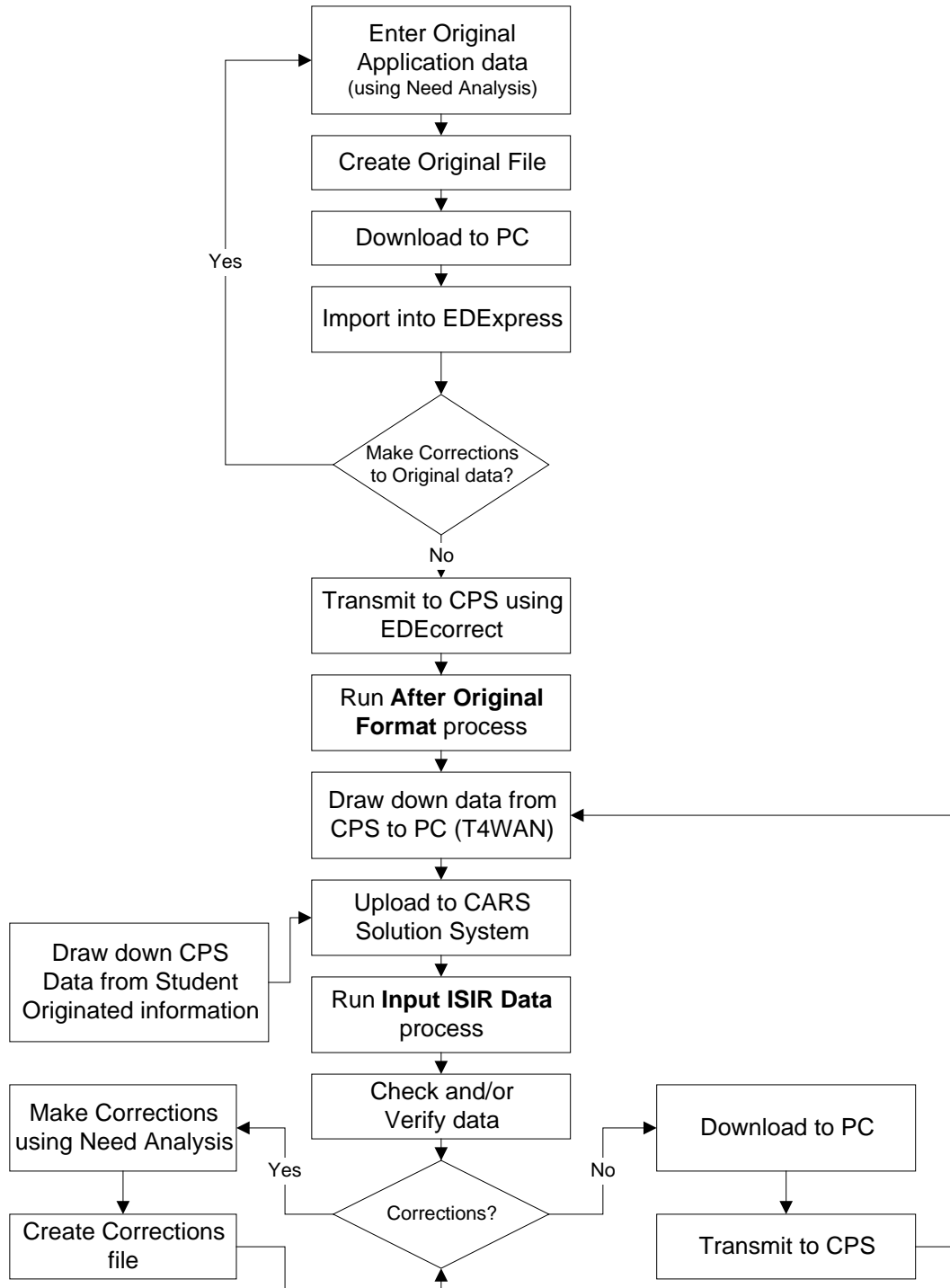
This section contains details about the following features of the EDE process:

- Process flow

EDE Process Flow

EDE Diagram

The following diagram shows the flow of data in the EDE process.



Data Flow Description

The following describes the data flow in the EDE process and describes the features used to process GES (General Electronic Support) data, including the following:

- Download files
 - Upload files
 - Transaction log
 - Processing to create original and correction applications
1. Prior to running the EDE process, the user creates need analysis information for a student using Financial Aid Need Analysis.
 2. The user creates the following files using the following Financial Aid: EDE Processing Menu options:
 - Create Corrections File to create: corr00in.dat for the 1999-2000 school year
 - Create Corrections File to create: correct.inp for school years prior to 1999-2000
 - Create Orig. Appl. File to create: eaps00in.dat for the 1999-2000 school year
 - Create Orig. Appl. File to create: original.inp for school years prior to 1999-2000

Note: The Pell RFMS (formerly EDE/Pell) process also creates the massldo.dat file, which contains the downloaded Pell program information. For more information on the Pell RFMS process, see the *Pell RFMS* section in this manual.
 3. The user downloads the above files to a PC using the *pcxmit* program.
 4. The user makes corrections to the original data, as necessary.
 5. Using the GES software, the user transmits the above files to the Central Processing Services (CPS) agency.
 6. Using the GES software, the user retrieves the processed need analysis data from the CPS. The CPS returns the need analysis information in the following files:
 - esaps0Xop.xxx
 - reap0Xop.xxx
 - sara0Xop.xxx
 - sarr0Xop.xxx
 - ytdo0Xop.xxx

Note: In the filenames above, 0X refers to the current year, and xxx refers to the Department of Education-assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).
 7. The user uploads the above files to CX using *pcxmit*.
 8. The user runs the *esarin* script, accessed from the Financial Aid: EDE Processing menu: Input ISIR Data option. The script reads the .dat, 001, 002, etc. files into the CX database, adds a .run extension, and renames the CPS-returned files in the following manner:
 - esaps0Xop.xxx..... esaps0Xop.xxx.run
 - reap0Xop.xxx reap0Xop.xxx.run
 - sara0Xop.xxx sara0Xop.xxx.run
 - sarr0Xop.xxx sarr0Xop.xxx.run
 - ytdo0Xop.xxx..... ytdo0Xop.xxx.run

Note: In the filenames above, 0X refers to the current year, and the xxx refers to the Department of Education-assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).
 9. The user makes corrections to the uploaded files as necessary.
 - If corrections are required, the user uses Need Analysis and creates a Corrections file. The user then transmits the file to the CPS.

- If no corrections are required, the user transmits the file to the CPS.

Download Files Stored in the *Pcfin* Directory

The following lists the download files that the EDE process stores in the *pcfin* home directory.

corr00.dat

The corrections file to be transmitted to the PC and CPS.

massldo.dat

The Pell RFMS (formerly EDE/Pell) file to be transmitted to the PC and CPS, created by the Pell RFMS process. For more information on the Pell RFMS process, see the *Pell RFMS* section in this manual.

eaps00in.dat

The original applications file to be transmitted to the PC and CPS.

Upload Files Stored in the *Pcfin* Directory

The following lists the upload files that the EDE process stores in the *pcfin* home directory.

eaps0Xxx.dat

Contains calculations based on initial electronic applications sent by your institution.

reap0Xxx.dat

Contains calculations based on renewal electronic applications sent by your institution.

sara0Xxx.dat

Contains calculations based on applications submitted from a site other than your institution.

sarr0Xxx.dat

Contains calculations based on corrections or duplicate ISIR requests sent by your institution.

ytdo0Xxx.dat

Contains year-to-date ISIR records. You can request that any of the following kinds of information be included in the records:

- Last official transcript for all students who listed your institution on the FAFSA
- All records from the beginning of the cycle to the present
- All records in a date range that you specify

Note: In the filenames above, 0X refers to the current year, and the xx refers to either output (op) or input (in) files.

Transaction Log

The system documents all transactions performed with u modem in the u modem.log file. The system automatically maintains the u modem.log file in the home directory of the user.

Marking GES Data for Export

The EDE process enables you to send original and correction applications to a PC to input to GES software. The GES software sends the information to the CPS (Central Processing Services) for processing. EDE processing allows the user to *mark* a record for export and indicates that the record is to be formatted into a file compatible with the GES software.

You perform above actions when creating original or correction files in the Financial Aid Need Analysis product.

SECTION 9 – PELL RFMS

Overview

Introduction

This section provides reference information about the Pell RFMS (formerly EDE/Pell) process. The Financial Aid product uses Pell RFMS processes to link institutions with the Central Processing System (CPS) of the Department of Education. Pell RFMS allows institutions to obtain, change, and report federal student aid application data and Pell Grant payment data electronically.

The CX Pell RFMS process is a separate process from the CX Electronic Data Exchange process.

Program Features Detailed

This section contains details about the following features of the Pell RFMS process:

- Process flows
- Parameters
- Program screens and windows

Access

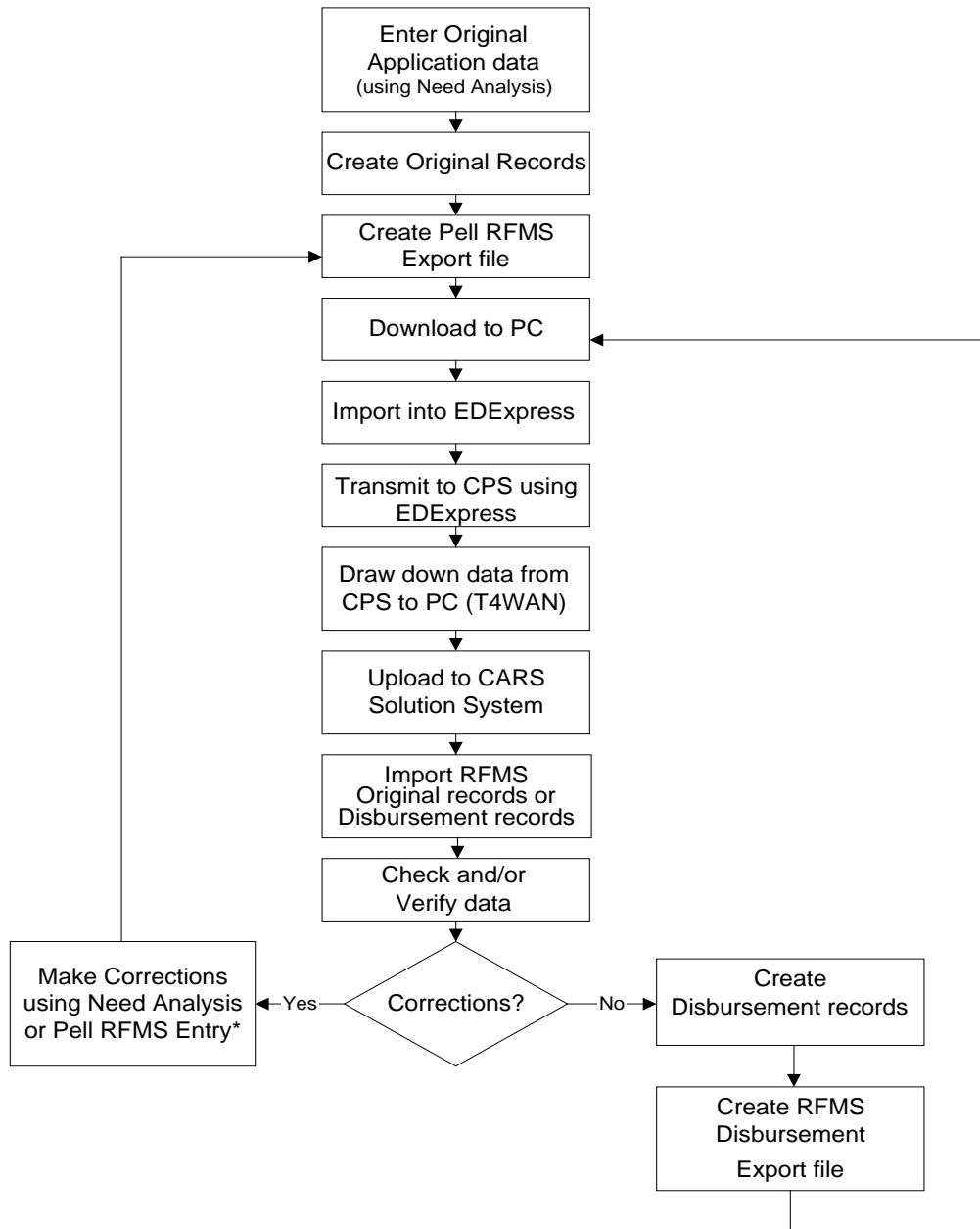
The program files for Pell RFMS processes are located in the following subdirectories paths under \$CARSPATH/src/finaid:

- rfms/
- rfmsentry/

Pell RFMS Process Flow

Pell RFMS Diagram

The following diagram shows the flow of data in the Pell RFMS process.



*If you need to make corrections using Pell RFMS Entry, the Create Original Records process will not include the corrected Pell RFMS record for export to the CPS.

Data Flow Description

The following describes the data flow in the Pell RFMS processes and describes the features used to process EDEExpress data, including the following:

- Export files
 - Import files
 - Processing to create original and disbursement applications
1. Prior to running the Pell RFMS process, the user creates need analysis information for a student using Financial Aid Need Analysis.
 2. The user creates the following files using the following Financial Aid: Pell RFMS Processing Menu options:
 - Create Original Records to create: pgoe0Xop.dat for the 1999-2000 school year
 - Create Disburse Records to create: pged0Xop.dat for the 1999-2000 school year
 3. The user creates the Pell RFMS export file and moves it to a PC using the *pcxmit* program.
 4. Using the EDEExpress software, the user transmits the above files to the Central Processing Services (CPS) agency.
 5. Using the EDEExpress software, the user retrieves the processed original and/or disbursement data from the CPS. The CPS returns the original and/or disbursement information via an acknowledgement file:
 - pgoa0Xop.xxx
 - pgda0Xop.xxx

Note: In the filenames above, *0X* refers to the current year, and *xxx* refers to the Department of Education-assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).
 6. The user imports the above files to CX using *pcxmit*.
 7. The user runs the *rfmsio*, or *rfmsid* scripts, accessed from the Financial Aid: Pell RFMS Processing menu: Pell RFMS Import-Orig or Pell RMS Import- Disb options. The scripts read the .dat, 001, 002, etc. files into the CX database, adds a .run extension, and renames the CPS-returned files in the following manner:
 - pgoa0Xop.xxx pgoa0Xop.xxx.run
 - pgda0Xop.xxx pgda0Xop.xxx.run

Note: In the filenames above, *0X* refers to the current year, and the *xxx* refers to the Department of Education-assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).
 8. The user makes corrections to the imported files as necessary.
 - The user uses Financial Aid Need Analysis to make any necessary corrections.
 - After corrections are made the user reruns the *rfmio*, or *rfmid* scripts in order to create a new export file. The user then transmits the file to the CPS.

Note: If you need to make corrections using the *rfmsentry* program, you cannot use the *rfmio* script to prepare this file for export to the CPS.

Export Files Stored in the *Pcfin* Directory

The following lists the export files that the Pell RFMS process stores in the *pcfin* home directory.

pgeoYYop.dat

The original file to be transmitted to the PC and CPS using the external format.

pgedYYop.dat

The disbursement file to be transmitted to the PC and CPS using the external format.

Note: In the filenames above, YY refers to the current year.

Import Files Stored in the *Pcfin* Directory

The following lists the import files that the Pell RFMS process stores in the *pcfin* home directory.

pgoaYYxx.xxx

The original acknowledgement files imported from CPS to the PC and then to CX.

pgdaYYxx.xxx

The disbursement acknowledgement files imported from CPS to the PC and then to CX.

Note: In the filenames above, YY refers to the current year, the xx refers to either output (op) or input (bk) files, and the xxx refers to the Department of Education-assigned sequence number.

Marking EDEExpress for Export

The Pell RFMS process enables you to send original and disbursement applications to a PC to input to EDEExpress software. The EDEExpress software sends the information to the CPS (Central Processing Services) for processing. Pell RFMS processing allows the user to *mark* a record for export.

Pell RFMS Program Process

The following lists the actions of the *rfms* program.

After successfully adding or updating a Pell RFMS record, the *rfms* program does the following:

1. Sets the *edepell_rec.act_code* field in the current Pell RFMS record (*edepell_rec*) to R.

Note: The RFMS Originals Export program exports an original Pell RFMS record (*edepell_rec*) when the record's *edepell_rec.act_code* field is set to R.

2. Sets the *edepell_rec.upd_date* field in the current Pell RFMS record (*edepell_rec*) to the current date.
3. Sends mail to the user.

When unsuccessfully adding or updating a Pell RFMS record for a student due to errors, the *rfms* program sends mail to the user indicating why a Pell RFMS record could not be added or updated.

Note: The mail sent by the *rfms* program contains a history of each student processed by the program and messages related to the success or failure in adding or updating a Pell RFMS record(s) for each student.

Pell RFMS Program Edit Check

The *rfms* program performs a special edit check on the Expected Family Contribution (*edepell_rec.efc*) field. If the Expected Family Contribution field exceeds a program defined maximum value, the program sends a warning error message in mail, even though the corresponding Pell RFMS record (*edepell_rec*) is updated or created. The program defined maximum for the *edepell_rec.efc* field is \$3100. The *rfms* program also performs other miscellaneous edit checks.

Pell RFMS Program Calculations

The *rfms* program calculates Pell amounts by calculating the value in the Remaining Amount to Be Paid (*edepell_rec.remaining_amt*) field of the Pell RFMS record (*edepell_rec*).

Remaining Amount to be Paid Calculation for Original Pell RFMS records

The following lists the calculation process that the *rfms* program performs to calculate the remaining amount to be paid to date.

1. For each Pell RFMS record selected, the program loads all corresponding Aid records (*aid_rec*) in which the following fields contain the following values:
 - *aid_rec.fa_yr* - contains a value that matches the indicated financial aid year
 - *aid_rec.id* - contains a value that matches the student ID of the Pell RFMS record (*edepell_rec*)
 - *aid_rec.stat* - does not contain a value of "S", "N", or "R"
 - *aid_rec.aid* - contains a value that matches the aid in the Aid table (*aid_table*)
 - *aid_table.pell_code* - contains a value of "Y"
 - *aid_code* - contains a value that matches a Pell code
 - *aid_rec.amt_stat* contains a value of "AA", "AD", or "AP"
2. The program totals the *aid_rec.amt* field for each Aid record corresponding to the indicated Financial Aid Year for the current student. This results in the total Pell amount to be paid to the student over the course of the Financial Aid Year.
3. The program then subtracts the Amount Paid To Date (*edepell_rec.amt_paid*) from the total of the *aid_rec.amt* values. The result is the Remaining Amount to Be Paid (*edepell_rec.remaining_amt*).

Amount Paid To Date Calculation for RFMS Disbursement records

The following lists the calculation process that the RFMS Disbursement program performs to calculate the amount paid to date.

The program loads all corresponding Pell RFMS records (*edepell_rec*) in which the *edepell_rec.act_code* field contains a value of "A" or "C".

The program loads all corresponding Pell RFMS Disbursement records for the selected ID and Financial Aid Year and totals the amount in the *pelldisb_rec.disb_amt* field of each record.

Remaining Amount to be Paid Calculation for RFMS Disbursement records

The following lists the calculation process that the RFMS Disbursement program performs to calculate the remaining amount to be paid to date.

1. The program loads all corresponding Academic Calendar records (*acad_cal_rec*) to determine the beginning date for the financial aid year and sorts the selected Financial Aid records accordingly.
2. For each Pell RFMS record selected, the program loads all corresponding Aid records (*aid_rec*) in which the following fields contain the following values:
 - *aid_rec.fa_yr* - contains a value that matches the indicated financial aid year
 - *aid_rec.id* - contains a value that matches the student ID of the Pell RFMS record (*edepell_rec*)
 - *aid_rec.aid* - contains a value that matches the aid in the Aid table (*aid_table*)
 - *aid_rec.amt_stat* contains a value of "AA", "AD", or "AP"
 - *aid_rec.stat* - does not contain a value of "S", "N", or "R"
 - *aid_table.pell_code* - contains a value of "Y"
 - *acad_cal_rec.prog* - contains a value that matches the program in the Academic Calendar record (*acad_cal_rec*)
 - *acad_cal_rec.yr* - contains a value that matches the year in the Academic Calendar record (*acad_cal_rec*)
 - *acad_cal_rec.sess* - contains a value that matches the session in the Academic Calendar record (*acad_cal_rec*)

- *acad_cal_rec.subsess* - contains a value that matches the subsession in the Academic Calendar record (*acad_cal_rec*)
 - *acad_cal_rec.beg_date* - contains a value that matches the beginning date in the Academic Calendar record (*acad_cal_rec*)
 - *aid_code* - contains a value that matches a Pell code
3. The program then subtracts the total amount disbursed from the total of the *aid_rec.amt* values. The result is the Remaining Amount to Be Paid.

Tables and Records Used

The Pell RFMS program uses the following Common and Pell RFMS tables and records.

Note: For information about the Common tables and records, see the *CX System Reference Technical Manual*. For information about the Pell RFMS tables and records, see the section *Financial Aid Tables and Records* in this manual.

Common tables and records

- *id_rec*

Pell RFMS tables and records

- *edepell_rec*
- *edepell_table*
- *pelldisb_rec*

Pell RFMS Parameters

Introduction

CX contains parameters and compilation values for executing the Pell RFMS programs. You can specify parameters to compile the Pell RFMS programs in a specified manner at the time of execution.

Note: You can also specify compilation values with the includes for the Financial Aid product that affect the Pell RFMS programs.

Pell RFMS Parameter Syntax

You can display Pell RFMS parameters by entering the program's name and an invalid parameter, such as the following: **rfms -**,

The following is the correct usage for running the Pell RFMS program from the UNIX shell:

Usage: `rfms -y fa yr [-s session] [-Y year] [-o] [-d] [-O] [-D] [-r disb_date]`

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required. The following lists the parameters for running Pell RFMS.

-d Disbursement record

Optional - Specifies the original Disbursement record. The parameter specifies that the program will create Pell RFMS Disbursement records with the specified Financial Aid Year.

Example: `rfms.ySdr -y 9900 -s FA99 -Y 1999 -d`

-D Disbursement record export

Optional - Specifies that you wish to export only original Disbursement records to CPS. The parameter specifies that the program will export only original Pell RFMS Disbursement records with the specified Financial Aid Year.

Example: `rfms.yD -y 9900 -D`

-o original PELL record

Optional - Specifies the original Pell RFMS record. The parameter specifies that the program will create only original Pell RFMS records with the specified Financial Aid Year (`edepell_rec.fa_yr`).

Example: `rfms.yo -y 9900 -o`

-O original record export

Optional - Specifies that you wish to export only original Pell records to CPS. The parameter specifies that the program will export only original Pell RFMS records with the specified Financial Aid Year.

Example: `rfms.yO -y 9900 -O`

--r disbursement date

Optional - Specifies the date that you wish to post disbursements.

Example: `rfms.ySdr -y 9900 -s FA99 -Y 1999 -r 04/26/1999`

-s session

Optional - Specifies the academic session for which you wish to create Pell RFMS Disbursement records.

Example: `rfms.ySdr -y 9900 -s FA99 -Y 1999 -d`

-y financial aid year

Required - Specifies the financial aid award year (e.g., 9900). The parameter specifies that the program will export only Pell RFMS records with the specified Financial Aid Year (edepell_rec.fa_yr).

Example: pellxprt -y 9900 -o

--Y year

Optional - Specifies the year for creating Pell RFMS Disbursement records.

Example: rfms.yrYdr -y 9900 -s FA99 -Y 1999

Pell Export Parameter Syntax

You can display Pell Export parameters by entering the program's name and an invalid parameter, such as the following: **pellxprt -**,

The following is the correct usage for running the *pellxprt* program from the UNIX shell:

```
pellxprt -y year
```

The following explains the parameter for running *pellxprt*.

-y year

Required - Used to specify the financial aid award year (e.g., 9697). The parameter specifies that the program will export only Pell RFMS records with the specified Financial Aid Year (edepell_rec.fa_yr).

Example: pellxprt -y 9697

Program Screens and Windows

Introduction

Pell RFMENTRY has two screens and one window for performing the following interactive functions:

- Creating/updating Pell RFMS records
- Creating/updating Pell RFMS Disbursement records

Access

The screen and window files for Pell *rfmsentry* are located in the following directory path:

- \$CARSPATH/modules/finaid/progscr/rfmsentry

Notes:

- You can access the Disbursement window from each program screen in *rfmsentry*.
- See the *CX System Reference Technical Manual* for information about common windows that appear in Financial Aid.

Screen Files and Table/Record Usage

The Pell RFMS screens and windows appear in the following files and use the indicated tables and records.

rfmsdisb

Contains the Disbursement window.

Access: \$CARSPATH/modules/finaid/progscr/rfmsentry

Tables/Records:

- pelldisb_rec

rfmsorig1

Contains the first Pell RFMS Entry screen.

Access: \$CARSPATH/modules/finaid/progscr/rfmsentry

Tables/Records:

- id_rec
- edepell_rec

rfmsorig2

Contains the second Pell RFMS Entry screen.

Access: \$CARSPATH/modules/finaid/progscr/rfmsentry

Tables/Records:

- edepell_rec

RFMS Originals Export Program

Introduction

After you use the *rfme.y* program to update and modify the Pell RFMS record (*edepell_rec*) data, you can run the RFMS Originals Export program (*rfms.yO*) to create an export file of the Pell RFMS record (*edepell_rec*). The RFMS Originals Export program builds the export file in a format acceptable by the Government EDExpress software. You can then transfer the file from the host computer to a PC via communications software on the PC.

RFMS Originals Export Program Process

The following lists the process of the RFMS Originals Export program.

1. The *rfms* program reads each record in the Pell RFMS record (*edepell_rec*) record and determines if the Export Status (*edepell_rec.act_code*) field is set to R. If the field is set to R, the program attempts to add the record to an export file.

Note: If the *rfms* program cannot add a Pell RFMS record (*edepell_rec*) to the export file due to errors, mail is sent to the user explaining why the record cannot be added.

2. After the program successfully adds a Pell RFMS record (*edepell_rec*) to the export file, the program performs the following actions:
 - Sets the *edepell_rec.act_code* field in the current Pell RFMS record (*edepell_rec*) to T
 - Sets the *edepell_rec.upd_date* field in the current Pell RFMS record (*edepell_rec*) to the current date
3. The *rfms* program sends mail to the user who executed the program. The mail contains a trace of each student processed by the program, and messages related to the success or failure of adding Pell RFMS records (*edepell_rec*) records to the export file.

rfms Program Edit Check

The *rfms* program performs a special edit check on the Expected Family Contribution (*edepell_rec.efc*) field. If the Expected Family Contribution field exceeds a program defined maximum value, the program sends a warning error message in mail, and the corresponding record is not added to the export file. The program defined maximum for the *edepell_rec.efc* field is \$3100. The *rfms* program also performs other miscellaneous edit checks.

RFMS Disbursement Export Program

Introduction

After you use the *rfme.y* program to update and modify the Pell RFMS record (*edepell_rec*) data, you can run the RFMS Disbursement Export program (*rfms.yD*) to create an export file of the *pelldisb* record. The RFMS Disbursement Export program builds the export file in a format acceptable by the Government EDEExpress software. You can then transfer the file from the host computer to a PC via communications software on the PC.

RFMS Disbursement Export Program Process

The following lists the process of the RFMS Disbursement Export program.

1. The *rfms.yD* program reads each Pell RFMS record (*edepell_rec*) and determines if the Export Status (*pelldisb_rec.act_code*) field is set to R. If the field is set to R, the program attempts to add the record to an export file.

Note: If the *rfms.yD* program cannot add a *pelldisb_rec* to the export file due to errors, mail is sent to the user explaining why the record cannot be added.

2. After the program successfully adds a *pelldisb* record to the export file, the program performs the following actions:
 - Sets the *pelldisb_rec.act_code* field in the current *pelldisb* record to T
 - Sets the *pelldisb_rec.disb_amt* field in the current Pell RFMS record (*edepell_rec*) to the current amount paid to date
3. The *rfms.yD* program sends mail to the user who executed the program. The mail contains a trace of each student processed by the program, and messages related to the success or failure of adding Pell RFMS records (*edepell_rec*) to the export file.

SECTION 10 – FINANCIAL AID LOAN PROGRAM

Overview

Introduction

This section provides reference information about the Financial Aid Loan program. The Financial Aid product uses Financial Aid Loan to track financial aid loans for both the FFELP (Federal Family Educational Loan Program) and Direct Lending interfaces. The FFELP Loan interface is designed to be “CommonLine Compliant” and uses current interface specifications to user selected third party software.

The Direct Lending interface is designed to allow a “combination” interface, which requires the use of the federally-provided EDEExpress loan tracking software.

Program Features Detailed

This section contains details about the following features of the Financial Aid Loan program:

- Process flow
- Parameters
- Program screens and windows

Access

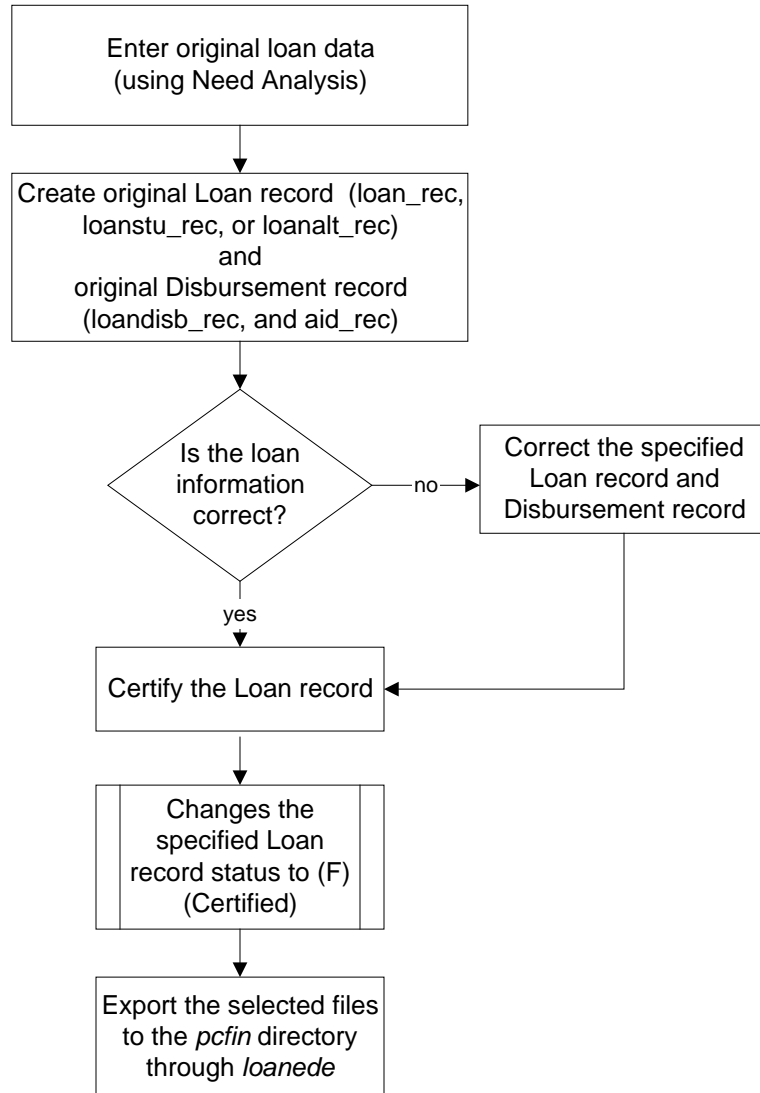
The program files for Loan processes are located in the following subdirectories paths under \$CARSPATH/src/finaid:

- loans/
- loanede/
- loanpost/
- loantable/

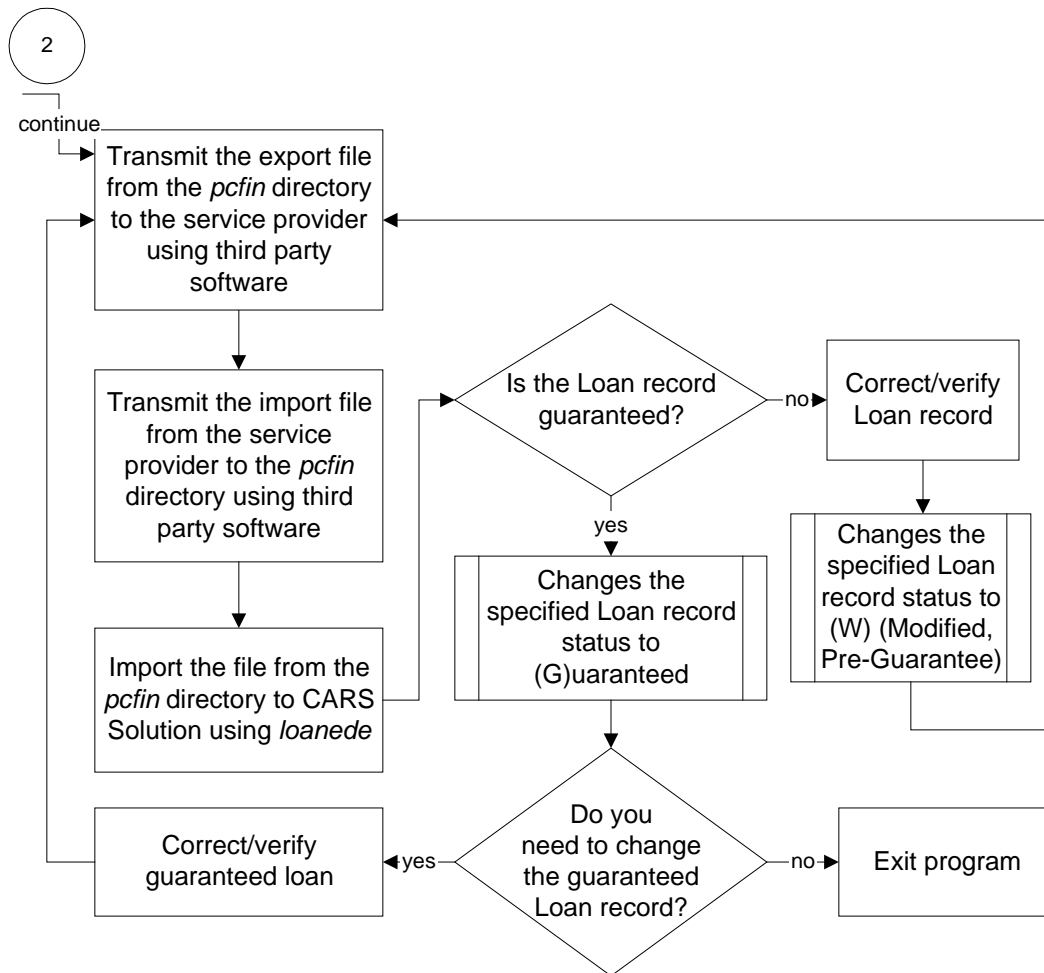
Process Flow

Diagram

The following diagram shows the flow of data in the Financial Aid Loan program.



2



Data Flow Description

The following describes the data flow in the Loan processes and describes the features used to process loan data, including the following:

- Export files
 - Import files
 - Processing to create originations and disbursement applications
 - Processing to create Change Transaction files.
1. Prior to running the Financial Aid Loan process, the user creates need analysis information for a student using Financial Aid Need Analysis.
 2. The user uses the *loans* program to create the following Loan records for students:
 - Stafford Loan records (*loan_rec*)
 - PLUS Loan records (*loanstu_rec*)
 - Alternate Loan records (*loanalt_rec*)

3. The user creates a Loan Disbursement records (*loandisb_rec*) using the **Disbursements** command from the selected Financial Aid Loan screen.

Note:

- If your institution sends and receives disbursement information via electronic fund transfer (EFT), the disbursement amount and date are entered automatically.
- To send and receive disbursements via EFT, you must load the financial table entries to support the posting of EFT roster files.

4. The user certifies all Loan records and Loan Disbursement records using the **Certify** command from the selected Financial Aid Loan screen. This changes the Status field to F (Certified) and marks the record for export to the service provider.
5. The user creates the following files using the *loanede* program from the Loan Tracking Main Menu: Export Loans option to export the certified Loan records to the *pcfin* directory:
 - Original Applications (CommonLine): *lcYYop.xxx* for the current school year
 - Change Transactions (CommonLine): *ccYYop.xxx* for the current school year

Note: In the filenames above, YY refers to the current year (e.g. 00 for 2000-2001), and xxx refers to the assigned sequence number. The first assigned filename is *.dat*. The remaining files are assigned a sequence number (e.g., *.001*, *.002*, etc.).

This changes the Loan record Status field to X (Exported).

6. The user uses third party software to transmit the Loan Export file from the *pcfin* directory to the service provider.
7. The service provider assigns each Loan record with a status of guaranteed, incomplete, or denied and sends the files back to your institution.
8. Using third party software, the user retrieves the processed original and/or disbursement data from the service provider. The service provider returns the original and/or disbursement information via the following files:
 - Original acknowledgement response file (CommonLine): *acYY.xxx* for the current school year
 - Disbursement roster file (CommonLine): *drYY.xxx* for the current school year

Note: In the filenames above, YY refers to the current year (e.g. 00 for 2000-2001), and xxx refers to the assigned sequence number. The first assigned filename is *.dat*. The remaining files are assigned a sequence number (e.g., *.001*, *.002*, etc.).

9. The user imports the above files to CX using the *loanede* program from the Financial Aid: Loan Tracking Main menu: Import Loans option. The imported Loan records will have a status of B (Guaranteed, disbursable), G (Guaranteed), I (Incomplete), or D (Denied). The *loanede* program reads the *.dat*, *001*, *002*, etc. files into the CX database, adds a *.run* extension, and renames the service provider-returned files in the following manner:
 - *acYY.xxx.....acYY.xxx.run*
 - *drYY.xxx..... drYY.xxx.run*

Note: In the filenames above, YY refers to the current year (e.g. 00 for 2000-2001), and xxx refers to the assigned sequence number. The first assigned filename is *.dat*. The remaining files are assigned a sequence number (e.g., *.001*, *.002*, etc.).

10. The user makes corrections to the imported files as necessary and then exports these records as a Change Transaction file to the service provider.

Note: In order to make corrections to Loan records and/or Disbursement records that have been imported from the service provider, you must rename the *.run* files

back to the acknowledgement filename (e.g., acYY.xxx for Original Application files and drYY.xxx for Disbursement Roster files). The YY refers to the current year (e.g. 00 for 2000-2001), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

Export Files Stored in the *Pcfin* Directory

The following lists the CommonLine export files that the Financial Aid Loan process stores in the *pcfin* home directory.

lc YYop.xxx

The origination file to be transmitted to the PC and the service provider using third party software.

cc YYop.xxx

The change transaction file to be transmitted to the PC and the service provider using third party software.

Note: In the filenames above, YY refers to the current year (e.g. 00 for 2000-2001), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

Import Files Stored in the *Pcfin* Directory

The following lists the CommonLine import files that the Financial Aid Loan process stores in the *pcfin* home directory.

ac YY.xxx

The origination acknowledgement response files imported from the service provider to the PC, using third party software, and then to CX.

dr YYop.xxx

The disbursement roster files imported from the service provider to the PC, using third party software, and then to CX.

Note: In the filenames above, YY refers to the current year (e.g. 00 for 2000-2001), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

Marking Loan Data for Export

The *Loanede* program enables you to send original loan applications and change request applications to a PC to input to third party software. The third party software sends the information to the service provider for processing. *Loanede* program allows the user to *mark* a record for export and indicates that the record is to be formatted into a file compatible with the third party software.

You perform above actions when creating original or correction files in the *Loans* program.

Tables and Records Used For Financial Aid Loan Tracking

The Financial Aid Loan Tracking (*loans*) program uses the following Common, Registration, and Financial Aid tables and records.

Note: For information about the Common tables and records, see the *CX System Reference Technical Manual*. For information about the Financial Aid Loan tables and records, see the section *Financial Aid Tables and Records* in this manual.

Common tables and records

- ctc_rec
- doc_table

Financial tables and records

- subt_rec
- vch_rec
- ent_table
- subs_table

Financial Aid tables and records

- aid_rec
- loanbatch_rec
- aid_table

Financial Aid Loan Parameters

Introduction

CX contains parameters and compilation values for executing the Financial Aid Loan program. You can specify parameters to compile Financial Aid Loan in a specified manner at the time of execution.

Note: You also can specify compilation values with the includes for the Financial Aid product that affect the Financial Aid Loan program.

Parameter Syntax

You can display Financial Aid Loan parameters by entering the following: **loans -**,

The following is the correct usage for running the *loans* program:

loans - program [-p] [-r] [-L *site*]

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running Financial Aid Loan.

-L

Optional - Specifies the site in which you are running Financial Aid Loan, where *site* represents the code you specify.

Example: Loans -L CARS

-p

Required - Specifies the academic program in which to process financial aid loans where *prog* represents the code you specify.

Example: Loans -p UNDG

-r

Display only - Specifies whether to disable Update mode in the Financial Aid Loan process.

Post Loans To Student Account Parameter Syntax

You can display *loanpost* parameters by entering the program's name and an invalid parameter, such as the following **loanpost -**,

The following is the correct usage for running the *loanpost* program:

loanpost - [-P sessions] [-b bal code] [-e ent type] -f aid year [-j journal] [-n doc station] [-o output] [-p program] [-s stu subs] [-S EFT subs] [-C doc code] [-D debug] [-E posting date]

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running *loanpost*.

-b

- Optional - Specifies the Student Subsidiary Balance code where *subsidiary balance* represents the code you specify.
- C** Optional - Specifies the EFT Document code where *document* represents the code you specify.
 - D** Optional - Specifies the level of debug messages to be displayed, where *debug_level* represents the message level (1,3,5,7,9). To receive more messages, you must specify a high level.
 - e** Optional - Specifies the Entry Type code to post EFT reimbursements where *entry type* represents the code you specify.
 - E** Optional - Specifies the effective posting date (mm/dd/yyyy) of the journal to be posted.
 - f** Required - Specifies the financial aid award year in which you are running Financial Aid Loan.
 - j** Optional - Specifies the EFT Journal code to post EFT disbursements where *journal reference* represents the code you specify.
 - n** Specifies the number of the EFT station number used to enter and process financial aid loans. The number is used for document control, and the default is 1.
 - o** Optional - Specifies the destination, including a printer, a file, or more for screen output.
 - p** Optional - Specifies the Program code for which you are running Financial Aid Loan, where *program* represents the code you specify.
 - P** Optional - Specifies the Session codes for which you are running Financial Aid Loan, where *sessions* represents the code you specify. Up to four Session codes, separated by commas, can be processed at a time.
 - s** Optional - Specifies the Student Subsidiary code for which you are running Financial Aid Loan, where *student account subsidiary* represents the code you specify.
 - S** Optional - Specifies the EFT Subsidiary code in which EFT rosters are posted, where *EFT subsidiary* represents the code you specify.

Loan Import, Export, and Reimport Parameter Syntax

You can display *loanede* parameters by entering the program's name and an invalid parameter, such as the following **loanede -**,

The following is the correct usage for running the *loanede* program:

```
loanede - [-c changes] -d import/export [-e ent type] -f aid year [-u unique ID] [-j journal] [-n doc station] [-o orig files] [-p program] [-r reprocess] [-s subs] [-x external] [-C doc code] [-D disb files] [-E posting date] [-L site] [-T trace]
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running *loanede*.

- c** Optional - Specifies the change transaction export files.
- C** Optional - Specifies the EFT Document code where *document* represents the code you specify.
- d** Required - Specifies import or export files.
- D** Optional - Specifies the disbursement roster import files.
- e** Optional - Specifies the Entry Type code to post EFT reimbursements where *entry type* represents the code you specify.
- E** Optional - Specifies the effective posting date of the journal to be posted.
- f** Required - Specifies the financial aid award year in which you are running Financial Aid Loan.
- j** Optional - Specifies the EFT Journal code to post EFT disbursements where *journal reference* represents the code you specify.
- L** Optional - Specifies the site from which you are exporting Loan records, where *site* represents the code you specify.
- n** Specifies the number of the EFT station number used to import financial aid loans. The number is used for document control, and the default is 1.
- o** Optional - Specifies the import original response files.
- p** Optional - Specifies the Academic Program code for which you export Loan records, where *program* represents the code you specify.
- r** Optional - Specifies the re-process data files.
- s** Optional - Specifies the Student Subsidiary code for which you import Loan records, where *student account subsidiary* represents the code you specify.
- T** Optional - Specifies the trace SQL output.
- u** Optional - Specifies the unique ID for which you re-import Loan records.
- x**

Optional - Specifies external loan files.

Program Screens and Windows

Introduction

Financial Aid Loan has ten screens and two windows for performing the following interactive functions:

- Entering/updating Financial Aid Loan records
- Entering/updating Financial Aid Loan Disbursement records
- Tracking Financial Aid Loan records
- Modifying Change Transaction files

Access

The screen and window files for Financial Aid Loan are located in the following directory path:

- \$CARSPATH/modules/finaid/progscr/Libloan

Notes:

- You can access windows from each program screen in Financial Aid Loan.
- See the *CX System Reference Technical Manual* for information about common windows that appear in Financial Aid Loan.

Screen Files and Table/Record Usage

The Financial Aid Loan screens and windows appear in the following files and use the indicated tables and records.

alt1

Contains the first Alternate Loan screen.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- faschd_table
- gradelvl_table
- lender_table
- loan_rec
- loanalt_rec
- loanorig_table
- loanprd_table
- loanstat_table
- loantype_table
- st_table

alt2

Contains the second Alternate Loan screen.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- gradelvl_table
- loan_rec
- loanalt_rec
- loanorig_table

- loanprd_table
- loantype_table
- st_table

disb

Contains the Financial Aid Loan Disbursement window.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- aid_rec
- aid_table
- disbstat_table
- loandisb_rec

disbchg

Contains the Financial Aid Loan Change Disbursement window.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- aid_rec
- loandisb_rec

loan1

Contains the first Stafford Loan screen.

Note: This screen is not available after the 1999-2000 financial aid award year. For Stafford Loan records for the 2000-2001 financial aid award year and beyond, see the ***mpn*** screen in this section.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- faschd_table
- gradelvl_table
- lender_table
- loan_rec
- loanguar_table
- loanorig_table
- loanprd_table
- loanstat_table
- loantype_table
- st_table

loan2

Contains the second Stafford Loan screen.

Note: This screen is not available after the 1999-2000 financial aid award year. For Stafford Loan records for the 2000-2001 financial aid award year and beyond, see the ***mpn*** screen in this section.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- gradelvl_table
- loan_rec
- loanorig_table
- loanprd_table

- loanstu_rec
- loantype_table
- st_table

loanchg

Display only - contains the Loan Change Record screen.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- loanchg_rec
- loanchg_table

loanstat

Display only - contains the Loan Tracking Entry (History) window.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- loanstat_rec
- loanstat_table

main

Display only - contains the Loan Summary screen.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- loan_rec
- loanstat_table
- loantype_table

mpn

Contains the first MPN Loans screen.

Note: Use this screen for Stafford Loan records created for the 2000-2001 financial aid award year and beyond. To view Stafford Loan records created prior to 2000-2001, see the **loan1** and **loan2** screens in this section.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- faschd_table
- gradelvl_table
- lender_table
- loan_rec
- loanguar_table
- loanorig_table
- loanprd_table
- loanstat_table
- loantype_table
- st_table

relation

Contains the Relationship screen.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- id_rec

stu

Display only - contains the header section of every Loan Tracking screen.

Access: \$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- id_rec
- prog_enr_rec

SECTION 11 - DOCUMENT TRACKING

Overview

Introduction

This section provides reference information about the Contact Entry program of the Document Tracking area of the Financial Aid product. Contact Entry allows you to view student's financial aid records and maintain associated Contact records. Document Tracking also has these features:

- Document Review: A Csh script that runs Document Tracking SQL scripts
- Contact Batch Entry: A common program used to enter a list of IDs in which to process contacts
- Reports that allow you to track what documents have been submitted, what documents need to be submitted, and how many times reminder letters have been sent to a student.

Notes:

- See *Menus, Screens, Scripts and Reports* in this document for more information about the Document Tracking scripts.
- See Contact Batch Entry in the *CX System Reference Technical Manual* for more information about the Contact Batch entry program.

CX uses Contact records to record the types of communication (e.g., letters or documents) sent by an institution to a student, and/or from a student to an institution. Institutions can have Contact records added for every student that begins financial aid processing. These are called *default contacts*.

Default Contact Records

The following are the standard Financial Aid product Contact records that the system adds each time a Student Financial Aid record (stufa_rec) is added. The default contact codes/resources records are defined in the \$CARSPATH/include/custom/finaid file.

- AIDAPPIN
- FEDIN
- SAPACTN
- FFSIN
- NAFIN
- PACKAGE
- STGVERIN
- PARTAXIN
- STUTAXIN

The default Contact records must be present in the Contact table.

Note: Default Contact records can be added or deleted from the \$CARSPATH/include/custom/finaid file. All added contacts must be placed before the {"LAST", " "} line in the file. The LAST line must remain in the file even if you delete all Contact records.

Creating Contact Records

You can enter Contacts for a student in a number of ways:

- Using the automatic creation of Student Financial Aid records feature: you can enter a series or large set of contacts for all students who have applied.

- Using Financial Aid Entry: when you award an aid to a student manually or using Packaging. Contacts of this type pertain to the specific requirements of the aid you are awarding.
- Using an SQL script: when you need a special contact for a particular set of students based upon selection criteria.
- Using Contact Entry: when you need to enter occasionally used contacts or contacts needed only after reviewing documentation for information that cannot be stored in the system.

Contents of Contact Records

Contact records contain several important pieces of information, as follows:

- ID - Specifies the student ID number for the contact
- Tickler - Specifies in the Contact table where the contact is defined, but it is not displayed on any of the screens in Document Tracking
- Correspondent ID - Specifies the ID number of the college that has requested financial aid transcripts if the contact denotes that one is expected
- Add date - Specifies the date the contact was added to the computer for a student
- Contact date - Specifies the date the contact was completed or executed
- Contact code - Specifies the name of the contact or Contact Resource
- Status - Specifies the current status of the contact: E for expected, C for completed, or V for voided

Predefining Contact Statuses

You can predefine those contact statuses that are added by Financial Aid Entry when awarding an aid, or those added or modified by an SQL script. The statuses are as follows:

- E - Indicating actions expected to occur in the future
- C - Indicating correspondence to actions already completed

The system initially creates most contacts with a status of E to indicate the corresponding action is *outstanding*. When the contact action does occur, such as when a particular document is received or a letter is sent to a student, the system updates the contact to a C status and updates the contact date to indicate when that step was achieved.

Program Features Detailed

This section contains details about the following features of the Contact Entry program:

- Process flow
- Parameters
- Program screens

Special Function Flags

The following records used by Contact Entry have special function flags.

ID record (id_rec)

- ENT_LOCK - Locks the ID record so that other users cannot select or update at the same time.

Profile record (profile_rec)

- ENT_LOCK - Locks the Profile record so that other users cannot select or update at the same time.
- ENT_AUTOINS - Allows the user to add new Profile records without modifying the default values. If this flag is not used, the system only adds a Profile record when an user changes a column value within the record.

Contact record (ctc_rec)

- ENT_SCSTART - Provides an alternate sorting of the Contact records. Checked at the entry of a scrolling region.
- ENT_SGGET - Filters out Contact records that are not of interest or should not be seen. Checked during the retrieval of each row within a scrolling region.
- ent_spec_func - Enables the sorting and filtering logic available on detail windows.

Notes:

- The ent_spec_func function uses the setup information from the entsel_table and entselcrit_table.
- The ent_spec_func function requires the setting of special function flags ENT_SCSTART and ENT_SCGET for the table in the filename array. At entry of the scroll region, ENT_SCSTART sorts the Contact records based upon the current sort criteria. When retrieving rows for display, ENT_SCGET checks the rows and displays or skips them.

Tickler record (tick_rec)

- ENT_LOCK - Locks the Tickler record so that other users cannot select or update at the same time.
- ENT_FORCELOAD - Loads the Tickler record even when none of the fields from the table are bound on the screen currently in use.

Relationship record (relation_rec)

- ENT_ADDID - Provides the ability to add or update an ID from within the related scroll region via a PTP (process-to-process) connection to ID Entry (identry).

Secondary Relationship record (relsec_rec)

- ENT_ADDID - Provides the ability to add or update an ID from within the related scroll region via a PTP (process-to-process) connection to ID Entry (identry).

Process Flow

Because you can use Contact Entry in a variety of ways, the program does not have a standard process flow.

Contact Entry Parameters

Introduction

CX contains parameters and compilation values for executing the Contact Entry program. You can specify parameters to compile Contact Entry in a specified manner at the time of execution.

Note: You can also specify compilation values with the includes for the Financial Aid product that affect the Contact Entry program.

Parameter Syntax

You can display Contact Entry parameters by entering the program's name and an invalid parameter, such as the following: **ctcentry -**,

The following is the correct usage for running the Contact Entry program from the UNIX shell:

```
ctcentry [-d] [-T tick] [-y fa_yr] [-o ofc_added_by] [-m menuname]
          [-f form_selected] [-t today] [-P scr_path] [-a] [-F]
          [-M menu_title] [-A] [-D debug_level] [-S pause_level]
```

Note: Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running Contact Entry.

-a

Optional - Specifies that Contact Entry will automatically enter query mode.

Example: `ctcentry -y 9697 -a`

-A

Optional - Specifies a second file filter for sorting purposes.

Example: `ctcentry -y 9697 -A`

-d

Optional - Specifies access to Contact Entry in display-only mode.

Example: `ctcentry -y 9697 -d`

-D *debug_level*

Optional - Specifies the level of debug messages to be displayed, where *debug_level* represents the message level (1,3,5,7,9). To receive more messages, you must specify a high level.

Example: `ctcentry -y 9697 -D 9`

-f *form_selected*

Optional - Specifies the name of the form you want to access directly, where *form_selected* represents the form name.

Example: `ctcentry -y 9697 -f stufa_1`

-F

Optional - Specifies that Contact Entry will force you to query the database for a record before you can enter insert mode.

Example: `ctcentry -y 9697 -F`

-m *menuname*

Optional - Specifies a menu that you want to access, where *menuname* represents the menu name. The default menu for Contact Entry is *ctcmenu*.

Example: `ctcentry -y 9697 -m ctcmenu`

-M *menu_title*

Optional - Specifies a different name to be displayed to the right of the screen's tool bar. If you specify more than one word, you must surround the words with quote marks.

Example: `ctcentry -y 9697 -M "Financial Aid"`

-o *ofc_added_by*

Optional - Specifies your office code, where *ofc_added_by* represents the office code you specify. The default office code for Contact Entry is *DEVL*.

Example: `ctcentry -y 9697 -o DEVL`

-P *scr_path*

Optional - Specifies the path for screens where *scr_path* represents the path of the screens to use for Contact Entry. The default for Contact Entry is *finaid/ctcentry/*.

Example: `ctcentry -y 9697 -P finaid/ctcentry`

-S *pause_level*

Optional - Specifies the level of pauses for Contact Entry where *pause_level* represents the message level (1-9). To receive more messages, you must specify a higher level.

Example: `ctcentry -y 9697 -S 9`

-t *today*

Optional - Specifies the effective date for changes, where *today* represents the date you specify.

Example: `ctcentry -y 9697 -t 05/01/96`

-T *tick*

Optional - Specifies the tickler code, where *tick* represents the contact tickler code. To run *ctcentry*, you must enter either this parameter or the *-y* parameter.

Example: `ctcentry -T FY96`

-y *fa_yr*

Optional - Specifies the financial aid award year, where *fa_yr* represents the financial aid award year. To run *ctcentry*, you must enter either this parameter or the *-T* parameter.

Example: `ctcentry -y 9697`

Program Screens

Purpose

Contact Entry has four screens for viewing students' financial aid records and entering Contact records.

Access

The screen files for Contact Entry are located in the following directory path:
\$CARSPATH/modules/finaid/progscr/ctcentry

Screen Files and Table/Record Usage

The Contact Entry screens appear in the following files and use the indicated tables and records.

ctcmenu

Contains the Student Forms menu screen.

Accesses: \$CARSPATH/modules/finaid/progscr/ctcentry

factc

Contains the Contact Entry detail window

Accesses: \$CARSPATH/modules/finaid/progscr/ctcentry

Tables/Records: id_rec, ctc_table, ctc_rec, ctc_blob

namectc

Contains the Contact Entry detail window, which displays Contacts with names.

Accesses: \$CARSPATH/modules/finaid/progscr/ctcentry

Tables/Records: id_rec, ctc_table, ctc_rec, ctc_blob

stufa_1

Contains the Contact Entry main screen.

Accesses: \$CARSPATH/modules/finaid/progscr/ctcentry

Tables/Records: stufa_rec, id_rec, aa_rec, st_table

SECTION 12 - FINANCIAL AID AUDITING

Overview

Introduction

This section provides reference information about the Financial Aid Audit program. The Financial Aid office can perform the following functions with Financial Aid Audit:

- Review discrepancies between its records and the Business office's records. When the audits are processed in update mode, the system corrects the discrepancies that can be corrected automatically.
- Verify the setup of aid codes that have been designated in the Aid Table (aid_table) to be utilized with the Financial Aid Transcript output/production.
- Obtain a report listing students records that have been changed within a specified date range.

Program Features Detailed

This section contains details about the following features of the Financial Aid program:

- Process flow
- Parameters

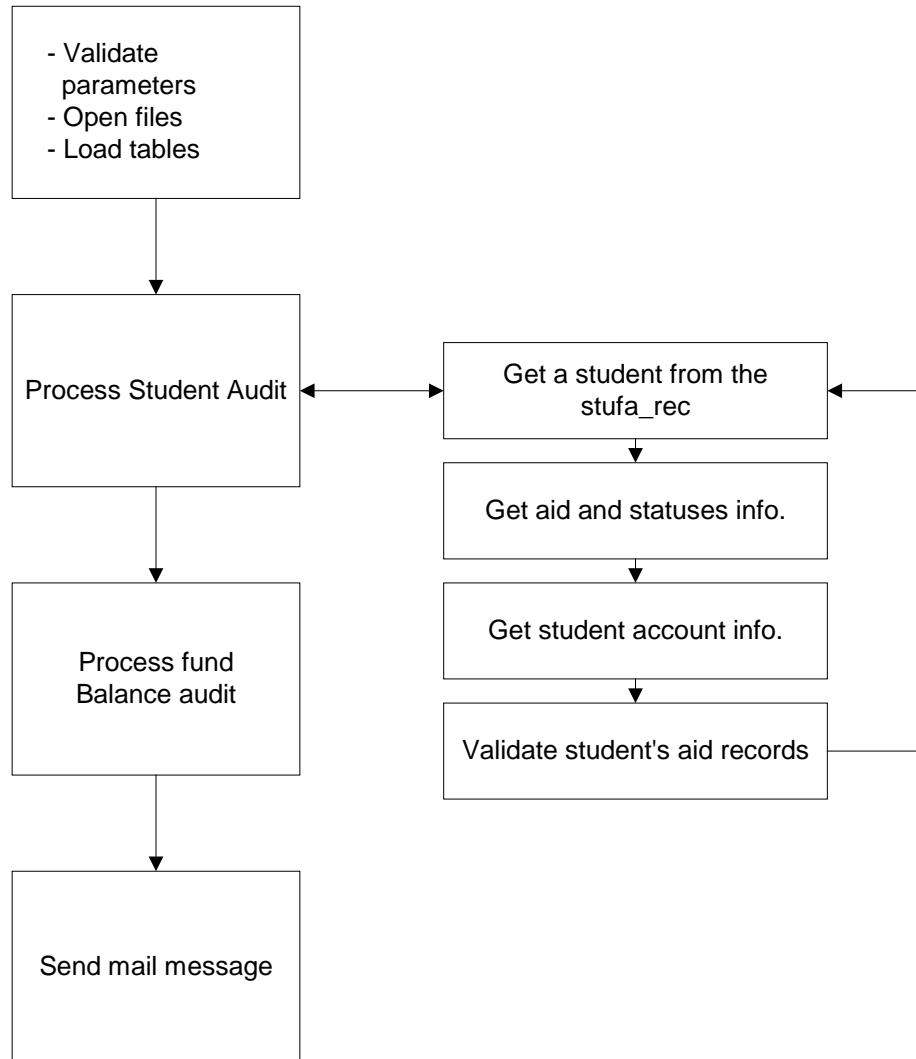
Times For Running Financial Aid Audit

Financial Aid Audit should not be run when another financial aid process is running (e.g., financial aid ACE reports, Financial Aid Entry, Financial Aid Need Analysis) since data being reported or displayed may be incorrect. Financial Aid Audit should be run overnight or at a time when financial aid processes are not running.

Process Flow

Diagram

The following diagram shows the flow of data in the Financial Aid Audit program.



Data Flow Description

The following describes the data flow in the Financial Aid Audit program.

1. Financial Aid Audit validates the user's entered parameters, opens input files, and loads tables. Financial Aid Audit uses the following tables as input:
 - aidpkg_table
 - aid_table
 - subs_table
 - aid_form_table
 - prog_table
 - stufa_rec
 - aid_rec

- subt_rec
2. Financial Aid Audit begins the student audit by reviewing the stufa_rec and aid_rec. The program processes each student in the stufa_rec for the financial aid award year value (stufa_fayr) specified by the user (using the -y parameter).

Notes:

- To be audited by the program, a student must have an entry in the stufa_rec. If the student has entries in the aid_rec without a corresponding stufa_rec entry, the program's results for the fund balance audit could be incorrect.
 - While processing entries in the aid_rec, Financial Aid Audit accumulates aid totals based on disbursed amounts and aid status values. The program uses these totals in the fund balance audit for validating the amounts in the aidpkg_table.
3. Financial Aid Audit selects a student entry in the stufa_rec, then the program searches the aid_rec for the following:
 - The award year value (aid_fayr) equal to that specified by the user (-y parameter).
 - The ID value (aid_id) equal to the ID value in the stufa_rec (stufa_id).
 4. Financial Aid Audit selects aid and statuses and student account information. As Financial Aid finds aid_recs, the program validates the following entries:
 - The aid_stat, aid_amt_stat, and aid_pkg_stat values.
 - The aid_pkg_meth to determine if it is valid according to the pkg_table (unless the -m parameter equals ALL or is not specified).

Note: If you run Financial Aid Audit using the -m parameter, the aid_pkg_meth also must equal the -m value (unless the -m value is ALL).

 - The aid_code value to determine if it is valid according to the aid_table.
 - The stufa_pkg_stat to ensure that it contains a valid packaging status.
 - The stufa_tot_offer against the total of the aid_amt for the aid records found.
 - The aid_amt_stat to ensure that the correct amount status value is in use.

Note: If you run the program to update errors, the program updates incorrect aid_amt_stat values and the stufa_tot_offer value.
 5. Financial Aid Audit locates the subt_rec corresponding to the aid_rec (if it exists) and compares the aid_amt to the subt_amt_pay_act.

Note: When the program processes all of the aid records for the current stufa_id, the program finds the next stufa_rec and processes the next student.

Financial Aid Audit processes the Fund Balance Audit. The program reviews the aidpkg_table to validate the aid amount totals against the accumulated amounts from the aid_rec. The program validates the aidpkg_table starting with the first entry containing the award year specified by the user. The program checks each entry found containing the following values against the aid totals obtained from the student audit pass:

- taidpkg_awd_amt
 - taidpkg_disb_amt
 - taidpkg_cancel_amt
6. Financial Aid Audit sends error messages if the program locates any amount field that:
 - Is non-zero and has no aid_rec entries that support the amount
 - Does not equal the accumulated amount from the aid_rec

After processing the aidpkg_table, Financial Aid Audit checks to see if any additional records need to be added to the aidpkg_table based on records in the aid_rec.

Note: If the user runs the program to update errors, Financial Aid Audit automatically adds entries to the aidpkg_table and updates the amounts where necessary.

Records Updated

The following records are added to or updated by Financial Aid Audit:

- aidpkg_table
- aid_rec
- stufa_rec

Financial Aid Audit Parameters

Introduction

CX contains parameters and compilation values for executing the Financial Aid Audit program. You can specify parameters to compile Financial Aid Audit in a specified manner at the time of execution.

Financial Aid Audit can be run either for all students in a financial award year, or for individual students. A specific packaging method can be audited with the method parameter.

Note: You can also specify compilation values with the includes for the Financial Aid product that affect the Financial Aid Audit program.

Parameter Syntax

You can display Financial Aid Audit parameters by entering the program's name and an invalid parameter, such as the following: **faudit -**,

The following is the correct usage for running the Financial Aid Audit program from the UNIX shell:

```
faudit -y year -l subs [-u -m method -o override -M mail option -U user list -i id numbers]
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running Financial Aid Audit.

-i ID numbers

Optional - Specifies ID number(s) to be audited where *ID number(s)* represents one or multiple ID numbers that you specify.

Example: faudit -y 9697 -l S/A -i 12666 65441

Note: This causes Financial Aid Audit to only perform the student audit in the aid_rec and stufa_rec for the ID numbers listed; Financial Aid Audit does not perform the fund balance audit of the aidpkg_table.

-l subs

Required - Specifies a subsidiary account ledger where *subs* refers to the subsidiary account ledger that you specify. A subsidiary parameter identifies the subsidiary that financial aid is disbursed to for validation of disbursed awards.

Example: faudit -y 9697 -l S/A

-m method

Optional - Specifies a packaging method to be audited where *method* represents the packaging method you specify.

Example: faudit -y 9697 -l S/A -m ACT

Note: Financial Aid Audit defaults to auditing both actual and also simulation packaging methods. To run Financial Aid Audit for a specific packaging method, use the -m method option.

-M

Optional - Specifies to mail output to the user.

Example: faudit -y 9697 -l S/A -i 12666 65441 -M

-o

Optional - Specifies the override option.

Example: faaudit -y 9697 -l S/A -i 12666 65441 -o

Note: Financial Aid Audit will not update errors if there are any unposted financial aid vouchers unless the -o override parameter is used along with the -u parameter.

-u

Optional - Specifies the update option.

Example: faaudit -y 9697 -l S/A -u

Note: The -u parameter allows *faaudit* to update the errors found for the two students in the -l parameter. However, if the -u option is specified, *Financial Aid Audit* checks for any unposted financial aid voucher transaction files before starting the audit.

-y year

Required - Specifies the award year where *year* represents the year you specify.

Example: faaudit -y 9697 -l S/A

Output Example

The following is an example of the audit output file produced by Financial Aid Audit:

Student Financial Aid Audit							
Year: 8687 Subs: S/A							
ID	Code	Sess	Ad Am Pk	Aid Amt	Tot Amt	Error Message	
14326	NDSL	FA86	N		0.00	0.00	Invalid amount status
14326	PELE	FA86	N		0.00	0.00	Invalid packaging status
14326	PELE	FA86	N		0.00	0.00	Invalid amount status
19155	STWK	SP87	N AA M	390.00	390.00		Amt stat should be AD *
20262	COMA	SP87	C AP M	200.00	100.00		#Aid amt updated but not posted
20671	DES1	SP87	C AP M	810.00	1080.00		#Aid amt updated but not posted
28648	ATHC	SP87	N AA M	100.00	100.00		Amt stat should be AD *
28648	BAGE	SP87	N AA M	350.00	350.00		Amt stat should be AD *
28648	JEFF	SP87	N AA M	500.00	500.00		Amt stat should be AD *
28648	SOGI	SP87	N AA M	500.00	500.00		Amt stat should be AD *
28915	NDSL	SP87	N AA M	750.00	750.00		Amt stat should be AD *
29015	COMA	SP87	C AP M	250.00	100.00		#Aid amt updated but not posted
29760	PELL	SP87	N AA M	285.00	285.00		Amt stat should be AD *
29962	DES	SP87	C AA	0.00	0.00		Invalid packaging status
30102	COMA	SP87	C AP M	250.00	150.00		#Aid amt updated but not posted
Fund Balance Audit							
Year: 8687 Subs: S/A							
Code	Type	Prog	Fund Balance	Aid Total	Error Message		
PELL	GRNT		1219.00	0.00	No aid recs: disb amt != 0 *		
CWSP	JOB		1500.00	0.00	No aid recs: awd amt != 0 *		
DES	GRNT	UNDG	-4250.00	500.00	Award amount != aid total *		
DES	GRNT	UNDG	63549.33	58799.33	Disb amount != aid total *		
PELL	GRNT	UNDG	2505.00	0.00	Award amount != aid total *		
PELL	GRNT	UNDG	351840.00	355564.00	Disb amount != aid total *		
# Run the Financial Aid Entry posting option to correct error							
Student audit error total: 15							
Fund balance audit error total: 6							

SECTION 13 - OTHER FINANCIAL AID PROGRAMS

Overview

Introduction

This section provides reference information about the other Financial Aid programs. The following programs and processes are discussed:

- Print Text Comments
- Need Analysis Tape Processing
- Financial Aid Check Refunding
- FISAP Reporting
- SSCR Processing

Print Text Comments

Introduction

CX contains parameters and compilation values for executing the Print Text Comments program. You can specify parameters to compile Print Text Comments in a specified manner at the time of execution.

Note: You can also specify compilation values with the includes for the Financial Aid product that affect the Print Text Comments program.

Parameter Syntax

You can display Print Text Comments parameters by entering the program's name and an invalid parameter, such as the following: **prtext -**,

The following is the correct usage for running the Print Text Comments program from the UNIX shell:

```
prtext [-f fatext] -y pp_year -b pp_id_beg [-e pp_id_end]
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running Print Text Comments.

-b *pp_id_beg*

Required - Specifies the beginning student ID number where *pp_id_beg* represents the ID number you specify.

Example: fatext -f ~<user account> -b 12345 -e 54321

-e *pp_id_end*

Optional - Specifies the ending student ID number where *pp_id_end* represents the ID number you specify.

Example: fatext -f ~<user account> -b 12345 -e 54321

-f *fatext*

Optional - Specifies the name and location of the output file where *fatext* represents the path and file name you specify.

Example: fatext -f ~<user account>

-y *pp_year*

Required - Specifies the financial aid year in which to print text comments.

Example: fatext -f ~<user account> -y 9697

Financial Aid Check Refunding

Introduction

The CX Financial Aid product contains the Check Refunding process for providing selective refunding of financial aid to students. The process can produce refund checks for groups of students or individually by student ID. For the CX Financial Aid Check Refunding process to function correctly, you must ensure that *all* of the following processes are set up on CX:

- Financial Aid Posting
- Fee Collection
- Third-Party Billing

Parameter Syntax

You can display Financial Aid Check Refunding (sa2sr) parameters by entering the program's name and an invalid parameter, such as the following: **sa2sr -**,

Following is the correct usage for running the Financial Aid Check Refunding program from the UNIX shell.

```
sa2sr -a aid_dmm -d aid_date [-i id_dmm] -p aid_pct [-r resrc_code] -s aid_sess [-t tick_code]
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running the Financial Aid Check Refunding program.

-a aid_dmm

Required - Specifies a list of refundable aid codes where *aid_dmm* represents one or multiple aid codes you specify.

Example: sa2sr -a PELL -d 050296 -p 100% -s FA96

-d aid_date

Required - Specifies the date that refund payment will occur where *aid_date* represents the date you specify.

Example: sa2sr -a PELL -d 050296 -p 100% -s FA96

-i id_dmm

Optional - Specifies a list of ID numbers of students to refund where *id_dmm* represents one or multiple ID numbers.

Note: Enter 0 to list all IDs.

Example: sa2sr -a PELL -d 050296 -i 12345 54321 -p 100% -s FA96

-p aid_pct

Required - Specifies the percentage of refundable aid to move to refundable accounts where *aid_pct* represents the percentage you specify.

Example: sa2sr -a PELL -d 050296 -p 100% -s FA96

-r resrc_code

Optional - Specifies the Contact record resource code where *resrc_code* represents the code you specify.

Example: sa2sr -a PELL -d 050296 -p 100% -r FACK001 -s FA96

-s aid_sess

Required - Specifies the session for this refunding where *aid_sess* represents the session you specify.

Example: sa2sr -a PELL -d 050296 -p 100% -r FACK001 -s FA96

-t tick_code

Optional - Specifies the Contact record tickler code where *tick_code* represents the code you specify.

Example: sa2sr -a PELL -d 050296 -p 100% -r FACK001 -s FA96 -t RFND

Tables Updated by Financial Aid Check Refunding Process

The *After Adding Aid Codes* process uses the codes in the Aid table (*aid_table*) to automatically update the Total Association table, the Subsidiary Association table, and the Subsidiary Total table.

- If the Deferment table *Refund Excess to Student* field is set to Y, and monies remain after all fees have been paid, the process places the refundable amount in the Subsidiary Total code on the student account.
- The process locates the Subsidiary Total code in the Deferment table *Refund Code* field value, associated by the Defer Application table.

Associated Tables

The Financial Aid Check Refunding process uses several tables to calculate refund amounts. The following lists the tables used in the process and each table's relationship with the other tables in the process.

Billing Fiscal Year table (fsbill_table)

Contains the fiscal year (e.g., 9X9Y), and the session/year (e.g., FA9X) codes that the Total Association table uses to apply the yearly cap amount.

Deferment table (defer_table)

- Contains the deferment application code that associates the Deferment table with the Deferment Application table.
- Also contains two important fields used by the check refunding process, which are:
 - Refund code
 - Refund excess to student

Deferment Application table (defapp_table)

- Contains the deferment application code that associates the Deferment Application table with the Deferment table.
- Contains the total association code (e.g., ENRL Enrollment Fees) that associates the Deferment Application table with the Total Association table.

Total Association table (totas_table)

Contains the total association code (e.g., ENRL Enrollment Fees) that associates the Total Association table with the Deferment Application and the Subsidiary Total tables.

Subsidiary Total table (subt_table)

Contains the association code that associates the Subsidiary Total table with the Total Association table.

Need Analysis Tape Conversion

Introduction

An institution can use the Need Analysis Tape Conversion processes to enter need analysis information from tapes to CX. The options on the Financial Aid: Need Analysis Tape Conversion menu allow the institution to enter information from the following tape sources to CX:

- Federal government
- ACT (American College Testing)
- CSS (College Scholastic Service)
- PHEAA (Pennsylvania Higher Education Assistance Agency)

Note: ACT has stopped supporting tapes for need analysis information; however, processing is available through the 93/94 session.

The need analysis tape conversion process loads financial aid need analysis information provided by tape from one of the Multiple Data Entry (MDE) processors into the CX Financial Aid Database. Once in the database, the need analysis information can be accessed for update or review by standard CX financial aid processes.

Parameter Syntax

The following is the correct usage for running Need Analysis Tape Conversion from the UNIX shell:

```
natp -l subs -y year -t tape_code -a agency [-r][-o][-v]
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running the Need Analysis Tape Conversion program.

-a agency

Required - Specifies the agency that produced the tape, where *agency* represents the tape agency you specify.

Example: natp -l S/A -y 9697 -t TAPE -a ACT

-l subs

Required - Specifies a Subsidiary Ledger, where *subs* represents the subsidiary code you specify.

Example: natp -l S/A -y 9697 -t TAPE -a ACT

-o

Optional - Specifies to override student information. This option allows the *natp* program to ignore special decision logic used to make sure that data in the Financial Aid Database is not overwritten.

Example: natp -l S/A -y 9697 -t TAPE -a ACT -o

-r

Optional - Specifies to report updates only. The NATP program does not copy or update student information. Use this option to identify students in the Need Analysis Tape Record with blank social security numbers.

Example: natp -l S/A -y 9697 -t TAPE -a ACT -r

-t tape_code

Required - Specifies a tape code, where *tape_code* represents the code you specify.

Example: natp -l S/A -y 9697 -t TAPE -a ACT

-v

Optional - Specifies verbose mode. This option turns on the printing of extensive messages listing each student processed and every add, update, or deletion by the program.

Example: natp -l S/A -y 9697 -t TAPE -a ACT -v

-y year

Required - Specifies the financial aid award year, where *year* represents the financial aid award year you specify.

Example: natp -l S/A -y 9697 -t TAPE -a ACT -r

Building Budget Tables

You can load the financial aid expense budget information on a tape into the student budget records. If you wish to load student expense budgets from tape, the Budget Table (*fabgt_table*) and Budget Association table (*fabgtas_table*) must contain entries matching the budget codes used on the tape. The tape conversion program will not load budgets when it cannot find an exact match of the tape budget code in the Budget Table or Budget Association Table. If a student already has Budget Records, they will not be updated through loading need analysis tape information.

The tape conversion program takes the first budget identified on the tape and adds the totals into the Fall session; it will not automatically split the budget into multiple sessions. At minimum, Budget Associations must exist for the Fall session. Also, the order of the Budget Association items must match the order of the items (i.e., tuition) found on the tape. The default budget item dollar amount in the Budget Association Table can be any value you wish to be defaulted. When budget information is loaded from tape, the dollar amounts loaded will be those found on the tape for each student.

Data Overwrite Protection Logic

The NATP program contains special logic verifying that information to be loaded from a tape does not automatically overwrite data already in the system. The following is a summary of this decision logic done for each student:

1. If the social security number is blank: no updates are done.
2. If the social security number from the tape is not found in the ID Record (*id_rec*): no updates are done.
3. If the tape information is older than the information in the Need Analysis Form Record (*naf_rec*): no updates are done.
4. If the Allow Tape Update field (*naf_allow_upd*) is set to N (No): no updates are done.
5. If the Allow Tape Update field is Y and the tape information is newer than the information in the Need Analysis Form Record, or there is no need analysis information in the system, then need analysis form (*naf_rec*) and intermediate calculation data (*fana_rec*) are loaded into the system.
6. If Budget Records (*fabgt_rec*) have not been added for the student, the first budget type defined on the tape is added for the student. If a budget record already exists, it will not be updated.
7. If the Allow Calc (*fan_allow_calc*) fields are Y, Need Records will be either added or updated depending on the information on the tape.

Note: If you use the -o (overwrite) option, the system ignores steps 3, 4, 5, and 7.

FISAP Reporting

Introduction

CX's FISAP reporting options can be used to assist in gathering the necessary data for the Department of Education's yearly Fiscal Operations Report and Application to Participate. The report sections produced directly by CX are Part II, Section E of the Applications and Fiscal Operations Report (FISAP) entitled Information on Eligible Aid Applicants for the Award Year FISAP_FAYR_TITLE, and Part VI, Section A Distribution of Program Recipients and Expenditures by Type of Student.

Parameter Syntax

You can display FISAP parameters by entering the following: **fisap -**,

The following is the correct usage for running the *fisap* program from the UNIX shell:

```
fisap [-b beg_id] [-i id_list] [-f] -l sub_code -c call [-v] [-m method] -y year
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running the *fisap* program.

-b beg_id

Optional - Specifies the beginning ID number where *beg_id* represents the ID number you specify.

Example: `fisap -y 9697 -b 12345 -l S/A -c 1`

-c call

Required - Specifies to run one or both routines of the *fisap* program where *call* represents the routine you want to call. The routines are as follows:

- Update total income
- Create Fisap record

When you specify **-c 1**, the program performs both routines. When you specify **-c 0**, the program only updates total income for a student.

Example: `fisap -y 9697 -l S/A -c 1`

-f

Optional - Specifies to read ID Numbers from stdin.

Example: `fisap -y 9697 -f -l S/A -c 1`

-i id_list

Optional - Specifies a list of ID numbers where *id_list* represents list of ID numbers.

Example: `fisap -y 9697 -i 12345 12346 12347 -l S/A -c 1`

-l sub_code

Required - Specifies the Subsidiary code where *sub_code* represents the code you specify.

Example: `fisap -y 9697 -l S/A -c 1`

-m method

Optional - Specifies the need analysis methodology where *method* represents the code you specify.

Example: `fisap -y 9697 -l S/A -c 1 -m FM`

-v

Optional - Specifies Verbose output.

Example: `fisap -y 9697 -l S/A -c 1 -v`

-y year

Required - Specifies the Financial Aid award year where *year* represents the code you specify.

Example: `fisap -y 9697 -l S/A -c 1`

Processing SSCR Data

Introduction

CX's SSCR process enables your institution to provide Student Status Confirmation Reports (SSCR) to the NSLDS (National Student Loan Data System) . The options on the Student Processing: SSCR Processing menu allow the institution to import, update, and export SSCR records.

Parameter Syntax

You can display SSCR parameters by entering the following: **sscr -**,

The following is the correct usage for running the *sscr* program from the UNIX shell:

```
sscr [-l] [-a] [-e] [-c Correct the data] [-u Unload file] -y fayr -L site
```

Parameters that appear in brackets are optional. Parameters that do not appear in brackets are required.

Parameters

The following lists the parameters for running the *sscr* program.

-l

Optional - Specifies to load a roster or error file and correct it with database info.

Example: `sscr -y 9900 -l`

-a

Optional - Specifies to add students with aid to the roster.

Example: `sscr -y 9900 -a`

-e

Optional - Specifies to edit data interactively.

Example: `sscr -y 9900 -e`

-c *correct the data*

Optional - Specifies to correct the data with updates from the database.

Example: `sscr -y 9900 -c Err`

-u *unload file*

Optional - Specifies to unload the roster or error file for return to NSLDS.

Example: `sscr -y 9900 -u Err`

-y *fayear*

Required - Specifies a Financial Aid Award year where *fayr* represents the code you specify.

Example: `sscr -y 9900`

-L *site*

Required - Specifies the site in which you are running SSCR, where *site* represents the code you specify.

Example: `sscr -y 9900 -L main`

SECTION 14 - MENUS, SCREENS, SCRIPTS AND REPORTS

Overview

Introduction

This section provides reference information on the following features of the Financial Aid product:

- Menu source files
- Menu option files
- PERFORM screens
- SQL scripts
- Csh scripts
- ACE reports
- Letters

Directory Locations

The features detailed in this section are located in the following directory paths:

Menu source files:

\$CARSPATH/menusrc/student/finaid

Menu option files:

\$CARSPATH/menuopt/finaid/:

- others
- reports
- scripts
- informers
- programs
- screens

PERFORM screens:

\$CARSPATH/modules/finaid/screens

Form screens:

\$CARSPATH/modules/finaid/forms

SQL scripts:

\$CARSPATH/modules/finaid/informers

Csh scripts:

\$CARSPATH/modules/finaid/scripts

ACE reports:

\$CARSPATH/modules/finaid/:

- reports
- others

Financial Aid Menus

Introduction

The CX menu source (menusr) directory path contains definitions of the CX menu structure. Specifically, the \$CARSPATH/menusr/student/finaid directory path contains definitions for Financial Aid menus.

Financial Aid Menu Structure

The following menu source (menusr) directories correspond to the Financial Aid menus on the CX menu system.

Financial Aid: Need Analysis Tape Conversion Menu

Menu source directory: \$CARSPATH/menusr/student/finaid/tpconv/

Financial Aid: Student Processing Menu

Menu source directory: \$CARSPATH/menusr/student/finaid/process/

Subdirectories:

Student Processing: Automated Packaging Menu

Menu source directory: \$CARSPATH/ menusr/student/finaid/process/fapkg/

Student Processing: Award/Cover Letter Menu

Menu source directory: \$CARSPATH/ menusr/student/finaid/process/awdlet/

Financial Aid: EDE Processing Menu

Menu source directory: \$CARSPATH/menusr/student/finaid/process/ede/

Financial Aid: Pell RFMS Menu

Menu source directory: \$CARSPATH/menusr/student/finaid/process/edepell/

Subdirectory:

Financial Aid: Pell RFMS Reports Menu

Menu source directory:

\$CARSPATH/menusr/student/finaid/process/edepell/rfmsreports

Financial Aid: 9899 Pell Payment Menu

Menu source directory:

\$CARSPATH/menusr/student/finaid/process/edepell/edepell98

Subdirectory:

Financial Aid: Pell Payment Processing Menu

Menu source directory:

\$CARSPATH/menusr/student/finaid/process/edepell/eededit

Refundable Aid Menu

Menu source directory: \$CARSPATH/menusr/student/finaid/process/ckwrtg/

Subdirectory:

Refundable Aid: Reports Menu

Menu source directory:

\$CARSPATH/menusr/student/finaid/process/ckwrtg/reports

Financial Aid: SAP Processing Menu

Menu source directory: \$CARSPATH/menusr/student/finaid/process/sap/

Student Processing: SSCR Processing Menu

Menu source directory: \$CARSPATH/menusr/student/finaid/process/sscr/

Financial Aid: Document Tracking Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/fadoc/

- \$CARSPATH/menusrc/student/finaid/fadoc/letters
- \$CARSPATH/menusrc/student/finaid/fadoc/reports

Document Tracking: Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/fadoc/letters/

Document Tracking: Letters Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/fadoc/reports/

Financial Aid: Loan Tracking Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/

- \$CARSPATH/menusrc/student/finaid/loan/reports
- \$CARSPATH/menusrc/student/finaid/loan/tables

Loan Tracking: Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/reports/

Loan Tracking: Table Maintenance Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/tables/

Financial Aid Data Display Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/recremain/

Financial Aid Audit Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/audit/

Financial Aid: Aid Disbursement Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/fapost/

Financial Aid: Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/

Subdirectories:

Note: You also access the Payroll/Personnel: College Work Study Program Menu from the Financial Aid: Reports Menu.

Reports: Aid Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/aidrpt/

Reports: Aid Transactions Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/transrpt/

Reports: FISAP Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/fisap/

Financial Aid Audits Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/audit/

Financial Aid: Table Maintenance Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/

Financial Aid: Need Analysis Table Maintenance Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/needtbl/

Table Maintenance: Packaging Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/pkgtbl/

Table Maintenance: Budget Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/bgttbl/

Table Maintenance: Compliance Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/cplytbl/

Table Maintenance: Contact/Tickler Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/ctctbl/

Table Maintenance: Enrollment Status Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/schdtbl/

Table Maintenance: Verification Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/vertbl/

Table Maintenance: SAP Table Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/saptbl/

Each directory above contains a *menudesc* file, which specifies what menu options appear in a menu. Specific menu options, however, are defined in the menu option (menuopt) directory path.

Menu Options

The following list associates each Financial Aid program, screen and script menu option and corresponding menuopt file and identifies the menuopt locations and what the menu option accesses.

Financial Aid: Need Analysis Tape Conversion Menu

Extract Need Tape Data

Accesses: Csh script: \$CARSPATH/modules/finaid/scripts/tpext

File: \$CARSPATH/menuopt/finaid/scripts/tpext

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_AGENCY (agency that provided the tape)
- PP_FORMAT (format of the tape)
- PP_FORM (media format of information)
- PP_PATH (full path and name of file)

Leads from Applicant Info

Accesses: Csh script: \$CARSPATH/modules/finaid/reports/natplead

File: \$CARSPATH/menuopt/finaid/reports/natplead

Non-Student Entry

Accesses: Program: \$CARSPATH/src/matric/mtidentry

File: \$CARSPATH/menuopt/matric/programs/mtide

Parameters Passed:

- -a (automatic query mode)
- -F (force query mode)
- -D 3 (debug level 3)

ID Data Entry

Accesses: Program: \$CARSPATH/src/common/identry

File: \$CARSPATH/menuopt/common/programs/ide.fa

Parameters Passed:

- -a (automatic query mode)

- -F (force query mode)
- -D 3 (debug level 3)
- -f indiv_1 (form: \$CARSPATH/modules/common/progscr/indiv1)

Update Tape/ISIR SS Num

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/natp

File: \$CARSPATH/menuopt/finaid/screens/natp

Load Tape Data

Accesses: Program: \$CARSPATH/src/finaid/natp

File: \$CARSPATH/menuopt/finaid/programs/natp.lyt

Parameters Passed:

- -l (subsidiary)
- -y PP_YEAR (financial aid award year)
- -a PP_AGENCY (agency that provided the tape)
- -t PP_FORMAT (format of the tape)
- -r PP_OPTION (report option only)
- -o PP_OVER (allow process to override existing financial aid records)
- -v PP_PRINT (verbose mode to report all adds/updates)

Load Tape/ISIR Data by SSN

Accesses: Program: \$CARSPATH/src/finaid/natp

File: \$CARSPATH/menuopt/finaid/programs/natp.lyts

Parameters Passed:

- -l (subsidiary)
- -y (financial aid award year)
- -a PP_AGENCY (agency that provided the tape)
- -t PP_FORMAT (format of the tape)
- -s PP_NUM (social security number)
- -r PP_OPTION (report option only)
- -o PP_OVER (allow process to override existing financial aid records)
- -v PP_PRINT (verbose mode to report all adds/updates)

PHEAA State/Pell Grant

Accesses: Csh script: \$CARSPATH/modules/finaid/scripts/pheaa_aid

File: \$CARSPATH/menuopt/finaid/scripts/pheaa_aid

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_AGENCY (agency that provided the tape)
- PP_FORMAT (format of the tape)
- PP_OPTION (report option only)
- PP_OVER (allow process to override existing financial aid records)
- PP_PRINT (verbose mode to report all adds/updates)

Financial Aid: Student Processing Menu

Student Need Analysis

Accesses: Program: \$CARSPATH/src/finaid/fanecd

File: \$CARSPATH/menuopt/finaid/programs/fa

Parameters Passed:

- -y *award year* (financial aid award year)
- -s *session* (current session)
- -L \${CARSPATH} (default site)

Financial Aid Entry

Accesses: Program: \$CARSPATH/src/finaid/faentry

File: \$CARSPATH/menuopt/finaid/programs/fae.lv

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -v (verify compliance)
- -L \${CARSPATH} (default site)

Print Text Comments

Accesses: Script: \$CARSPATH/modules/finaid/scripts/prtext

File: \$CARSPATH/menuopt/finaid/scripts/prtext

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_ID_BEG (ID number)
- PP_ID_END (ID number)
- PP_OUTPUT (output)

Student Processing: Automated Packaging Menu

Financial Aid Entry

Accesses: Program: \$CARSPATH/src/finaid/faentry

File: \$CARSPATH/menuopt/finaid/programs/fae.lv

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -v (verify compliance)
- -L \${CARSPATH} (default site)

Package Parameters

Accesses: Screen: \$CARSPATH/modules/finaid/screens/ppkg

File: \$CARSPATH/menuopt/finaid/screens/ppkg

Update Package Allow Flag

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/allowpkg

File: \$CARSPATH/menuopt/finaid/informers/allowpkg

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_CODE (packaging group code)
- PP_ALLOW (allow packaging y/n)

Update Simulated Pkg Amts

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/updpkgamt

File: \$CARSPATH/menuopt/finaid/informers/updpgamt

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_METHOD (packaging method)

Financial Aid Packaging

Accesses: Program: \$CARSPATH/src/finaid/faentry

File: \$CARSPATH/menuopt/finaid/programs/fae.lyspP

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -s PP_SESS (session)
- -p PP_PROG (program to be packaged)
- -P PP_PARAM (packaging parameter code)
- -L \${CARSPATH} (default site)

Fund Balances Report

Accesses: Program: \$CARSPATH/modules/finaid/reports/tpkgamt

File: \$CARSPATH/menuopt/finaid/reports/tpkgamt

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_PROG (program to be packaged)
- PP_METHOD (beginning method)
- PP_METHOD (ending method)

Print Aid Simulations

Accesses: Program: \$CARSPATH/modules/finaid/reports/aidsim

File: \$CARSPATH/menuopt/finaid/reports/aidsim

Parameters Passed:

- PP_METHOD (beginning method)
- PP_METHOD (ending method)
- PP_YEAR (financial aid award year)
- PP_PROG (program to be packaged)

Delete Simulation Records

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/delsim

File: \$CARSPATH/menuopt/finaid/informers/delsim

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_METHOD (packaging method)
- PP_PROG (program to be packaged)

Add Need Records/Fixed Adj

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/addproj

File: \$CARSPATH/menuopt/finaid/informers/fixproj

Parameters Passed:

- PP_YEAR (financial aid award year)

- PP_METHOD (packaging method)
- PP_AMOUNT (adjustment amount)

Add Need Records/Pct Adj

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/addproj

File: \$CARSPATH/menuopt/finaid/informers/pctproj

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_METHOD (packaging method)
- PP_PERCENT (adjustment percentage)

Student Processing: Award/Cover Letter Menu

Select Award Notices

Accesses: Program: \$CARSPATH/src/finaid/faentry

File: \$CARSPATH/menuopt/finaid/programs/fae.lyschr

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -s PP_SESS1 (session)
- -s PP_SESS2 (session)
- -s PP_SESS3 (session)
- -s PP_SESS4 (session)
- -c PP_SESS (current session)
- -f PP_FORM (award notification form)
- -r PP_DATE (return date)
- -L \${CARSPATH} (default site)

Print Award Notices

Accesses: Program: \$CARSPATH/src/util/fps

File: \$CARSPATH/menuopt/utilities/programs/fps.faent

Create Cover Letters

Accesses: SQL script: \$CARSPATH/modules/common/scripts/lblrun

File: \$CARSPATH/menuopt/finaid/scripts/ltrfacover

Parameters Passed:

- PP_LTB_SELECT (letters, labels, both, none)
- PP_TICK (tickler code)
- PP_DATE (date)
- PP_DATE (date)
- PP_YEAR (financial aid award year)

Print Award/Cover Letters

Accesses: Program: \$CARSPATH/src/util/lps

File: \$CARSPATH/menuopt/utilities/programs/lps.faa

Financial Aid: EDE Processing Menu

Student Need Analysis

Accesses: Program: \$CARSPATH/src/finaid/faneed

File: \$CARSPATH/menuopt/finaid/programs/fa

Parameters Passed:

- -y *award year* (financial aid award year)
- -s *session* (current session)
- -L \${CARSPATH} (default site)

Input ISIR Data

Accesses: Csh script: \$CARSPATH/modules/finaid/scripts/esarin

File: \$CARSPATH/menuopt/finaid/scripts/esarin

Parameters Passed:

- FA_YR_DEF (default financial aid award year)
- GES

Update Tape/ISIR SS Num

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/natp

File: \$CARSPATH/menuopt/finaid/screens/natp

Load ISIR Data by SSN

Accesses: Program: \$CARSPATH/src/finaid/natp

File: \$CARSPATH/menuopt/finaid/programs/natp2.lyts

Parameters Passed:

- -l (subsidiary)
- -y PP_YEAR (financial aid award year)
- -a GES
- -t GES
- -s PP_NUM (social security number)
- User specification: -o PP_OVER (allow process to override existing financial aid records)
- User specification: -v PP_PRINT (verbose mode to report all adds/updates)

ID Data Entry

Accesses: Program: \$CARSPATH/src/common/identry

File: \$CARSPATH/menuopt/common/programs/ide.fa

Parameters Passed:

- -a (automatic query mode)
- -F (force query mode)
- -D 3 (debug level 3)
- -f indiv_1 (form: \$CARSPATH/modules/common/progscr/indiv1)

Create Corrections File

Accesses: Program: \$CARSPATH/src/finaid/faneed

File: \$CARSPATH/menuopt/finaid/programs/facor

Parameters Passed:

- -y PP_YEAR (financial aid award year)

- -o GES
- -L \${CARSPATH} (default site)

Create Orig. Appl. File

Accesses: Program: \$CARSPATH/src/finaid/faneed

File: \$CARSPATH/menuopt/finaid/programs/faorig

Parameters Passed:

- -y PP_YEAR (financial aid award year)
- -O GES
- -L \${CARSPATH} (default site)

After Original Format

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/updexport

File: \$CARSPATH/menuopt/finaid/informers/updexport

Parameters Passed:

- PP_YEAR (financial aid award year)

Financial Aid: Pell RFMS Menu

Create Original Records

Accesses: Program: \$CARSPATH/src/finaid/rfms

File: \$CARSPATH/menuopt/finaid/programs/rfms.yo

Parameters Passed:

- -y PP_YEAR (financial aid award year)

Create Disburse Records

Accesses: Program: \$CARSPATH/src/finaid/rfms

File: \$CARSPATH/menuopt/finaid/programs/rfms.ySdr

Parameters Passed:

- -y PP_YEAR (financial aid award year)
- -s PP_SESS (session)
- -Y PP_YEAR (year)
- -r PP_DATE_POST (disbursement date)
- -d (Disbursement record)

Pell RFMS Entry

Accesses: Program: \$CARSPATH/src/finaid/rfmsentry

File: \$CARSPATH/menuopt/finaid/programs/rfme.y

Parameters Passed:

- -y PP_YEAR (financial aid award year)

Batch Status Update

Accesses: Program: \$CARSPATH/src/finaid/rfmsentry

File: \$CARSPATH/menuopt/finaid/informers/rfmb.ybs

Parameters Passed:

- -y PP_YEAR (financial aid award year)

- -b (batch)
- *status*

RFMS Originals Export

Accesses: Program: \$CARSPATH/src/finaid/rfms

File: \$CARSPATH/menuopt/finaid/programs/rfms.yO

Parameters Passed:

- -y PP_YEAR (financial aid award year)

RFMS Disbursement Export

Accesses: Program: \$CARSPATH/src/finaid/rfms

File: \$CARSPATH/menuopt/finaid/programs/rfms.yD

Parameters Passed:

- -y PP_YEAR (financial aid award year)

Pell RFMS Import- Orig

Accesses: Program: \$CARSPATH/src/finaid/rfmsentry

File: \$CARSPATH/menuopt/finaid/scripts/rfmio.y

Parameters Passed:

- -y PP_YEAR (financial aid award year)

Pell RFMS Import- Disb

Accesses: Program: \$CARSPATH/src/finaid/rfmsentry

File: \$CARSPATH/menuopt/finaid/scripts/rfmid.y

Parameters Passed:

- -y PP_YEAR (financial aid award year)

Financial Aid: 9899 Pell Payment Menu

Note: The following menu options are not valid after the 1998-99 financial aid award year.

Contact Entry/Display

Accesses: Program: \$CARSPATH/src/finaid/ctcentry

File: \$CARSPATH/menuopt/finaid/programs/ctce

Parameters Passed:

- -y PP_YEAR (financial aid award year)

Select Students to Report

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/edepell

File: \$CARSPATH/menuopt/finaid/informers/edepell

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_TICK (tickler code)
- PP_CTC_RESRC (contact resource code)

Add Student Pmt Records

Accesses: Program: \$CARSPATH/src/finaid/edepell

File: \$CARSPATH/menuopt/finaid/programs/edepell

Parameters Passed:

- -y PP_YEAR (financial aid award year)
- -l (subsidiary)
- -r PP_CTC_RESRC (contact resource code)
- -T PP_TICK (tickler code)
- -s PP_SESS (session)

Create Pell Download File

Accesses: Program: \$CARSPATH/src/finaid/pellxprt

File: \$CARSPATH/menuopt/finaid/program/pellxprt

Parameters Passed:

- -y PP_YEAR (financial aid award year)

Financial Aid: Pell Payment Editing Menu

Note: The following menu options are not valid after the 1998-99 financial aid award year. To review a student's Pell information for the 1999-2000 financial aid award year and beyond, see the *Financial Aid: Pell RFMS Menu: Pell RFMS Entry* menu option in this section.

1998-99 Pell Pmt Records

File: PERFORM screen: \$CARSPATH/src/finaid/screens/edepell98

Parameters Passed: \$CARSPATH/menuopt/finaid/screens/edepell98

1997-98 Pell Pmt Records

Accesses: PERFORM screen: \$CARSPATH/src/finaid/screens/edepell97

File: \$CARSPATH/menuopt/finaid/screens/edepell97

Refundable Aid Menu

Refund - Contacts

Accesses: Csh script: \$CARSPATH/modules/finaid/scripts/refctc

File: \$CARSPATH/menuopt/finaid/scripts/refctc

Parameters Passed:

- PP_FA_CODE (financial aid code to be refunded)
- PP_SITE \${CARSPATH} (default site)
- PP_SESS (session)
- PP_ACAD_YR (academic year)
- PP_SUBP (balance period code)
- PP_MIN_HRS (minimum number of enrolled hours to receive a refund)
- PP_MAX_HRS (maximum number of enrolled hours to receive a refund)
- PP_TICK (contact tickler code)
- PP_CTC_RESRC (contact resource code)
- PP_DATE_DUE (contact due date)

Post Refunds - Contacts

Accesses: Posting process (Contacts)

File: \$CARSPATH/menuopt/finaid/programs/ctcsa2sr

Parameters Passed:

- -a PP_FA_CODE (financial aid code)
- -t PP_TICK (contact tickler code)
- -r PP_CTC_RESRC (contact resource code)
- -d PP_DATE (refund payment date)
- -s PP_BAL_RFND (refund balance period)
- -p PP_PERCENT (percentage of aid to be refunded)

Refund - ID

Accesses: Distribution process (financial aid and refundable cash)

File: \$CARSPATH/menuopt/accounting/programs/bfee.id

Parameters Passed:

- -s PP_SESS (session)
- -y PP_ACAD_YR (academic year)
- -p PP_PROG (program)
- -i PP_ID (ID number)

Post Refunds - ID

Accesses: Posting process (IDs)

File: \$CARSPATH/menuopt/finaid/programs/idsa2sr

Parameters Passed:

- -a PP_FA_CODE (aid code)
- -d PP_DATE (refund payment date)
- -s PP_BAL_RFND (refund balance period)
- -p PP_PERCENT (percentage of aid to be refunded)
- -i PP_ID (ID number)

Financial Aid Entry

Accesses: Program: \$CARSPATH/src/finaid/faentry

File: \$CARSPATH/menuopt/finaid/programs/fae.lv

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -v (verify compliance)
- -L \${CARSPATH} (default site)

Financial Aid: SAP Processing Menu

Select FA SAP IDs

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/selsapids

File: \$CARSPATH/menuopt/finaid/informers/selsapids

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_TICK (tickler code)
- PP_SESS (first session)
- PP_ACAD_YEAR (financial aid award year of first session)
- PP_SESS2 (second session)
- PP_ACAD_YEAR (financial aid award year of second session)

- PP_SESS3 (third session)
- PP_ACAD_YEAR (financial aid award year of third session)

SAP Listing

Accesses: SQL script: \$CARSPATH/modules/common/reports/saplist

File: \$CARSPATH/menuopt/modules/common/saplist

Parameters Passed:

- PP_SESS (session)
- PP_YEAR (financial aid award year]
- PP_PROG (program)
- PP_SAP_TRACK (SAP track)
- PP_SAP_CODE (SAP code)
- PP_DATE_BEG (beginning date)
- PP_DATE_END (end date)
- PP_ID_BEG (beginning ID)
- PP_ID_END (end ID)

Contact Range

Accesses: SQL script: \$CARSPATH/modules/finaid/reports/ctcrange

File: \$CARSPATH/modules/finaid/report/ctcrange

Parameters Passed:

- PP_TICK (tickler code)
- PP_PROG (program)
- PP_STATUS (status)
- PP_FIRST (contact)
- PP_SECOND (comments)

SAP Compliance Process

Accesses: Program: \$CARSPATH/src/finaid/fasap,
\$CARSPATH/finaid/programs/fasapcply

File: \$CARSPATH/menuopt/finaid/programs/fsap.rtcysYL,
\$CARSPATH/menuopt/finaid/programs/fsapcply

Parameters Passed:

- PP_TICK (tickler code)
- PP_CTC_RESRC (contact resource)
- PP_FA_YR (financial aid award year)
- PP_SESS (session)
- PP_YEAR (financial aid award year)
- PP_PROG (program)
- PP_SAP_TRACK (SAP track code)
- PP_SAP_CRIT (SAP criteria)
- PP_SAP_PASS (SAP pass criteria)
- PP_SAP_FAIL (SAP fail criteria)

SAP Action Process

Accesses: Program: \$CARSPATH/src/finaid/fasap,
\$CARSPATH/finaid/programs/fasapact

File: \$CARSPATH/menuopt/finaid/programs/fsap.rtySYLA,
\$CARSPATH/menuopt/finaid/programs/fasapact

Parameters Passed:

- PP_SAP_TRACK (SAP track code)
- PP_TICK (tickler code)
- PP_CTC_RESRC (contact resource)
- PP_FA_YR (financial aid award year)
- PP_SESS1 (first session)
- PP_YEAR (financial aid award year)
- PP_SESS2 (second session)
- PP_YEAR (financial aid award year)
- PP_SESS3 (third session)
- PP_YEAR (financial aid award year)
- PP_SESS4 (fourth session)
- PP_YEAR (financial aid award year)

Student Processing: SSCR Processing Menu

Load SSCR File

Accesses: Program: \$CARSPATH/src/finaid/sscr

File: \$CARSPATH/menuopt/finaid/programs/sscr.la

Parameters Passed:

- PP_YEAR (financial aid award year)

Update SSCR File

Accesses: Program: \$CARSPATH/src/finaid/sscr

File: \$CARSPATH/menuopt/finaid/programs/sscr.c

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_TYPE (type of file)

Edit SSCR Records

Accesses: Program: \$CARSPATH/src/finaid/sscr

File: \$CARSPATH/menuopt/finaid/programs/sscr.e

Parameters Passed: none

Unload SSCR Corrections

Accesses: Program: \$CARSPATH/src/finaid/sscr

File: \$CARSPATH/menuopt/finaid/programs/selsapids

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_TYPE (type of file)

Financial Aid: Document Tracking Menu

Contact Entry/Display

Accesses: Program: \$CARSPATH/src/finaid/ctcentry

File: \$CARSPATH/menuopt/finaid/programs/ctce

Parameters Passed:

- -a (automatic query mode)
- -F (force query mode)
- -y PP_YEAR (financial aid award year)
- -f stufa_1 (form: \$CARSPATH/modules/finaid/progscr/ctcentry/stufa_1)
- -D 3 (debug level 3)

Contact Batch Entry

Accesses: Program: \$CARSPATH/src/common/ctcbatch

File: \$CARSPATH/menuopt/common/programs/ctcbatch

Parameters Passed:

- -t PP_TICK (tickler code)
- -r PP_CTC_RESRC (contact resource)
- -s PP_STATUS (contact status)
- -d PP_DATE_DUE (contact due date)
- -f PP_FILE (filename for contacts)

Re-run Contact Batch Entry

Accesses: Program: \$CARSPATH/src/common/ctcbatch

File: \$CARSPATH/menuopt/common/programs/ctcbatchr

Parameters Passed:

- -R (run in batch mode)

Document Review Script

Accesses: Csh script: \$CARSPATH/modules/finaid/scripts/docrev

File: \$CARSPATH/menuopt/finaid/scripts/docrev

Parameters Passed:

- PP_TICK (tickler code)
- PP_YEAR (financial aid award year)

Document Tracking: Letters Menu

Select Status Letter - One

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/statusctc

File: \$CARSPATH/menuopt/finaid/screens/statusctc

Select Status Letters - All

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/statctc

File: \$CARSPATH/menuopt/finaid/informers/statctc

Parameters Passed:

- PP_TICK (contact tickler code)
- PP_CTC_RESRC (contact resource code)
- -DCOMM LETT (contact communication value: letters)
- -DDUEDATE PP_DATE (contact due date)
- -DACERPT (ACE report)

Create Status Letters

Accesses: Csh script: \$CARSPATH/modules/common/scripts/ltbrun

File: \$CARSPATH/menuopt/finaid/scripts/ltrfastat

Parameters Passed:

- PP_LTB_SELECT (letters, labels, both, none)
- PP_TICK (tickler code)
- PP_DATE (date)
- PP_DATE (date)

Create Status Letters

Accesses: Csh script: \$CARSPATH/modules/finaid/scripts/ltrstatctc

File: \$CARSPATH/menuopt/finaid/scripts/ltrstatctc

Parameters Passed:

- PP_LTB_SELECT (letters, labels, both, none)
- PP_TICK (tickler code)
- PP_DATE (date)
- PP_DATE (date)
- PP_YEAR (financial aid award year)

Create Termination Letters

Accesses: Csh script: \$CARSPATH/modules/finaid/scripts/ltrterm

File: \$CARSPATH/menuopt/finaid/scripts/ltrterm

Parameters Passed:

- PP_LTB_SELECT (letters, labels, both, none)
- PP_TICK (tickler code)
- PP_CTC (contact code)
- PP_DATE (date)
- PP_DATE (date)
- PP_YEAR (financial aid award year)

Print Letters

Accesses: Program: \$CARSPATH/src/util/lps

File: \$CARSPATH/menuopt/utilities/programs/lps.faa

Financial Aid: Loan Tracking Menu

Loan Tracking Entry

Accesses: Program: \$CARSPATH/modules/finaid/progscr/Libloan/main

File: \$CARSPATH/menuopt/finaid/programs/loans

Parameters Passed:

- -p PP_PROG (program code)
- -L PP_SITE (site code)

Export Loans

Accesses: Program: \$CARSPATH/src/finaid/loanede

File: \$CARSPATH/menuopt/finaid/programs/loanexport

Parameters Passed:

- -f PP_FA_YR (financial aid year code)
- -p PP_PROG (program code)

- -L PP_SITE (site code)
- -o (original applications)
- -c (change requests)

Import Loans

Accesses: Program: \$CARSPATH/src/finaid/loanede

File: \$CARSPATH/menuopt/finaid/programs/loanimport

Parameters Passed:

- -f PP_FA_YR (financial aid year code)
- -o (application responses)
- -D (disbursement rosters)

Note: The following parameters are applicable if you choose to import disbursement rosters:

- -j PP_TVCH (journal type code)
- -C PP_DOC (EFT document code)
- -n PP_STATION (EFT station number code)
- -e PP_ENT (EFT entry type code for posting)
- -s PP_SUBS (subsidiary code for posting EFT disbursements)
- -E PP_DATE (effective date of the journal for posting to roster file)

Post Loans to Student Accounts

Accesses: Csh script: \$CARSPATH/src/finaid/loanpost

File: \$CARSPATH/menuopt/finaid/programs/loanpost

Parameters Passed:

- -f PP_FA_YR (financial aid code)
- -P (sessions)
- -o PP_OUTPUT (output code)
- -p PP_PROG (program code)
- -j PP_TVCH (journal type code)
- -c PP_DOC (EFT document code)
- -n PP_STATION (EFT station number)
- -e PP_ENT (entry type code to post EFT reimbursements)
- -s (student account subsidiary)
- -b PP_SUB (student subsidiary balance code)
- -S (EFT subsidiary)
- -E PP_DATE (effective date of the journal to be posted)

Re-Import Exceptions

Accesses: Csh script: \$CARSPATH/src/finaid/loanreimport

File: \$CARSPATH/menuopt/finaid/programs/loanreimport

Parameters Passed:

- -u (unique ID number)
- -f PP_FA_YR (financial aid code)
- -o (application responses)
- -D (disbursement rosters)
- -j PP_TVCH (journal type code)
- -C PP_DOC (EFT document code)
- -n PP_STATION (EFT station number)
- -e PP_ENT (entry type code to post EFT reimbursements)

- -b PP_SUBS (student subsidiary balance code)
- -E PP_DATE (effective date of the journal to be posted)

Loan Tracking: Reports Menu

Loan Status Comparison

Accesses: PERFORM screen: \$CARSPATH/menuopt/finaid/reports/loanCmpr

File: \$CARSPATH/menuopt/finaid/reports/loanCmpr

Disbursement Roster

Accesses: SQL script: \$CARSPATH/menuopt/finaid/reports/disbRoster

File: \$CARSPATH/menuopt/finaid/reports/disbRoster

Disbursement Exceptions

Accesses: SQL script: \$CARSPATH/menuopt/finaid/reports/loanDisbAmt

File: \$CARSPATH/menuopt/finaid/reports/loanDisbAmt

Financial Aid: Data Display Menu

Display Student Data

Accesses: Program: \$CARSPATH/src/regist/stuentry

File: \$CARSPATH/menuopt/finaid/programs/faview

Parameters Passed:

- -f faview (form: \$CARSPATH/modules/regist/progscr/stuentry/faview_1)
- -d (display-only)
- -L \${CARSPATH} (default site)

Display Registrations

Accesses: Program: \$CARSPATH/src/regist/regent

File: \$CARSPATH/menuopt/regist/programs/regent.d

Parameters Passed:

- -p PP_PROG
- -L \${CARSPATH} (default site)
- -F F (registration finish functionality)
- -m HC (disable main menu options: Holds, Confirm)
- -e R (disable enrollment menu option: Reinstate)
- -r C B R L T A (disable registration menu options: Edate, Blkadd, Disrefnd, Loadallcw, Subsess, Locallsecs)
- -d (display-only)

Display Transcripts

Accesses: Program: \$CARSPATH/src/regist/trans

File: \$CARSPATH/menuopt/regist/programs/trns.d

Parameters Passed:

- -d (display-only)
- -f MORE (display transcript using more pager)
- -L \${CARSPATH} (default site)

Bursar Query

Accesses: Program: \$CARSPATH/src/accounting/bursar

File: \$CARSPATH/menuopt/accounting/programs/bsr.D

Parameters Passed:

- -D (display-only)
- -o PP_PRINTER (printer)

Financial Aid: Audit Menu

Audit: No Update

Accesses: Program: \$CARSPATH/src/finaid/faaudit

File: \$CARSPATH/menuopt/finaid/programs/faau.yl

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -m PP_METHOD (packaging method)
- -M (mail option)
- -U (user list)

Audit: With Update

Accesses: Program: \$CARSPATH/src/finaid/faaudit

File: \$CARSPATH/menuopt/finaid/programs/faau.ylu

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -m PP_METHOD (packaging method)
- -u (update)
- -M (mail option)
- -U (user list)

Reports: Aid Reports Menu

Add Compliance Statistics

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/sumcomp

File: \$CARSPATH/menuopt/finaid/informers/sumcomp

Parameters Passed:

- -DYR PP_ACAD_YR (financial aid award year)

Compliance Audit

Accesses: Program: \$CARSPATH/src/finaid/faentry

File: \$CARSPATH/menuopt/finaid/programs/fae.lypso

Parameters Passed:

- -I (subsidiary)
- -y PP_YEAR (financial aid award year)
- -s PP_SESS (session)
- -p PP_PROG (academic program)
- -o PP_OUTPUT (output)

- -v PP_RPT(compliance report type)
- -L \${CARSPATH} (default site)

Reports: Aid Transactions Menu

G/L Journal Reports

Accesses: Csh script: \$CARSPATH/modules/accounting/scripts/jrnlgl

File: \$CARSPATH/menuopt/accounting/scripts/jrnlgl.FA

Parameters Passed:

- -f FT_STANDARD (form)
- FA PP_BEG_VCH_NO (beginning journal number)
- PP_VCH_END (ending journal number)
- N PP_OUTPUT (output)

S/L Journal Reports

Accesses: Csh script: \$CARSPATH/modules/accounting/scripts/jrnlsl

File: \$CARSPATH/menuopt/accounting/scripts/jrnlsl.FA

Parameters Passed:

- -f FT_STANDARD (form)
- FA PP_BEG_VCH_NO (beginning journal number)
- PP_VCH_END (ending journal number)
- N PP_OUTPUT (output)

Reports: FISAP Reports Menu

Create FISAP Records

Accesses: Program: \$CARSPATH/src/finaid/fisap

File: \$CARSPATH/menuopt/finaid/programs/fisap.iblmvc

Parameters Passed:

- PP_SUBS (subsidiary code)
- PP_ID (ID number)
- PP_ID_BEG (beginning ID number)
- PP_FA_YR (financial aid award year)
- *need analysis methodology*

Default Initial Values

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/updfisap

File: \$CARSPATH/menuopt/finaid/informers/updfisap

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_PROG (program)
- PP_NUM (full-time enrollment minimum)
- PP_SESS1 (first session)
- PP_ACAD_YR (academic year)
- PP_SESS2 (second session)
- PP_ACAD_YR (academic year)
- PP_SESS3 (third session)
- PP_ACAD_YR (academic year)

- *date* (degree granted date)

Update Total Income

Accesses: Program: \$CARSPATH/src/finaid/fisap

File: \$CARSPATH/menuopt/finaid/programs/fisap.iblmv

Parameters Passed:

- PP_ID (ID numbers)
- PP_ID_BEG (beginning ID number)
- PP_FA_YR (financial aid award year)
- *need analysis method*

No Need/No Income

Accesses: Csh script: \$CARSPATH/modules/finaid/reports/noneedinc

File: \$CARSPATH/menuopt/finaid/programs/fisap.iblmv

Parameters Passed:

- PP_ID (ID numbers)
- PP_ID_BEG (beginning ID number)
- PP_FA_YR (financial aid award year)
- *need analysis method*

Students Not Attending

Accesses: ACE Report: \$CARSPATH/modules/finaid/reports/noattend

File: \$CARSPATH/menuopt/finaid/reports/noattend

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_SESS1 (first session)
- PP_ACAD_YR (first year)
- PP_SESS2 (second session)
- PP_ACAD_YR (second year)
- P_SESS3 (third session)
- PP_ACAD_YR (third year)

FISAP Data Audit

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screen/fisapau

File: \$CARSPATH/menuopt/finaid/others/fisapau

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_STUDENTS (students with missing data or all students)

FISAP Data Entry

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screen/fisap

File: \$CARSPATH/menuopt/finaid/screens/fisap

Dep. Eligible for Aid

Accesses: \$CARSPATH/modules/finaid/others/eligdep

File: \$CARSPATH/menuopt/finaid/others/eligdep

Parameters Passed:

- PP_YEAR (financial aid award year)

Indep. Eligible for Aid

Accesses: \$CARSPATH/modules/finaid/others/eligindep

File: \$CARSPATH/menuopt/finaid/others/eligindep

Parameters Passed:

- PP_YEAR (financial aid award year)

Eligible for Aid - Detail

Accesses: \$CARSPATH/modules/finaid/others/testelig

File: \$CARSPATH/menuopt/finaid/others/testelig

Parameters Passed:

- PP_YEAR (financial aid award year)

FISAP Report Grid

Accesses: \$CARSPATH/modules/finaid/others/fisaptot

File: \$CARSPATH/menuopt/finaid/others/fisaptot

Parameters Passed:

- PP_YEAR (financial aid award year)

FISAP Report - Detail

Accesses: \$CARSPATH/modules/finaid/others/testtot

File: \$CARSPATH/menuopt/finaid/others/testtot

Parameters Passed:

- PP_YEAR (financial aid award year)

Missing Data Audit

Accesses: \$CARSPATH/modules/finaid/others/totaudit

File: \$CARSPATH/menuopt/finaid/others/totaudit

Parameters Passed:

- PP_YEAR (financial aid award year)

Financial Aid: Table Maintenance Menu

Aid Types/Forms

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/taidtype

File: \$CARSPATH/menuopt/finaid/screens/taidtype

Funding Codes

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tfndg

File: \$CARSPATH/menuopt/finaid/screens/tfndg

Aid Codes

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/taid

File: \$CARSPATH/menuopt/finaid/screens/taid

After Adding Aid Codes

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/addaidsubs

File: \$CARSPATH/menuopt/finaid/informers/addaidsubs

Fund Balances

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/taidpkg

File: \$CARSPATH/menuopt/finaid/screens/taidpkg

Financial Aid: Need Analysis Table Maintenance Menu

Need Analysis Methods

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/xfameth

File: \$CARSPATH/menuopt/finaid/screens/xfameth

Create Need Anal. Meth.

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/addxfameth

File: \$CARSPATH/menuopt/finaid/informers/addxfameth

IM Method Options

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/timmeth

File: \$CARSPATH/menuopt/finaid/screens/timmeth

Asset Protect Allow

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tapa

File: \$CARSPATH/menuopt/finaid/screens/tapa

Bus/Farm Net Worth

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tbusfarm

File: \$CARSPATH/menuopt/finaid/screens/tbusfarm

Estimated U.S. Tax

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/xfatax

File: \$CARSPATH/menuopt/finaid/screens/xfatax

Income Protect Allow

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tipa

File: \$CARSPATH/menuopt/finaid/screens/tipa

Income Contribution

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tincont

File: \$CARSPATH/menuopt/finaid/screens/tincont

State Tax Allowance

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/ttaxallow

File: \$CARSPATH/menuopt/finaid/screens/ttaxallow

Table Maintenance: Packaging Tables Menu

Packaging Codes

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tpkg

File: \$CARSPATH/menuopt/finaid/screens/tpkg

Copy Packaging Tables

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/addtPKG

File: \$CARSPATH/menuopt/finaid/informers/addtPKG

Parameters Passed:

- PP_YEAR (financial aid year to copy from)
- PP_YEAR (financial aid year to copy in)
- PP_METHOD (packaging method to copy from)
- PP_METHOD (packaging method to copy in)

Minn. State Grant Table

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tmngmnt

File: \$CARSPATH/menuopt/finaid/screens/tmngmnt

Table Maintenance: Budget Tables Menu

Budget Expense Items

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tfaitem

File: \$CARSPATH/menuopt/finaid/screens/tfaitem

Budget Types

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tfabgt

File: \$CARSPATH/menuopt/finaid/screens/tfabgt

Budget Groups

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tbgtgrp

File: \$CARSPATH/menuopt/finaid/screens/tbgtgrp

Copy Budget Associations

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/adtfabgtas

File: \$CARSPATH/menuopt/finaid/informers/adtfabgtas

Parameters Passed:

- PP_YEAR (financial aid year to copy from)
- PP_SESS (session to copy from)
- PP_YEAR (financial aid year to copy to)
- PP_SESS (session to copy to)

Expense/Subs Total Assoc.

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tfaexpas

File: \$CARSPATH/menuopt/finaid/screens/tfaexpas

Table Maintenance: Compliance Tables Menu

Compliance Codes

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tcomply

File: \$CARSPATH/menuopt/finaid/screens/tcomply

Copy Compliance Tables

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/addtcply

File: \$CARSPATH/menuopt/finaid/informers/addtcply

Parameters Passed:

- PP_YEAR (financial aid year to copy from)
- PP_YEAR (financial aid year to copy in)
- PP_TICK (contact tickler code)

Table Maintenance: Contact/Tickler Menu

Tickler

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/ttick

File: \$CARSPATH/menuopt/finaid/screens/ttick

Contact

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tctc

File: \$CARSPATH/menuopt/finaid/screens/tctc

Copy Tick/Contact Tables

Accesses: SQL script: \$CARSPATH/modules/finaid/informers/addtctc

File: \$CARSPATH/menuopt/finaid/informers/addtctc

Parameters Passed:

- PP_YEAR (financial aid year to copy from)
- PP_YEAR (financial aid year to copy in)
- PP_TICK (contact tickler code)

Table Maintenance: Enrollment Status Tables Menu

Aid Detail

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/taiddtl

File: \$CARSPATH/menuopt/finaid/screens/taiddtl

Enrollment Schedule

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tschdsess

File: \$CARSPATH/menuopt/finaid/screens/tschdsess

Session

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tfasess

File: \$CARSPATH/menuopt/finaid/screens/tfasess

Table Maintenance: Verification Table Menu

FA Verification

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tfaver

File: \$CARSPATH/menuopt/finaid/screens/tfaver

Table Maintenance: SAP Table Menu

SAP Codes

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tfasap

File: \$CARSPATH/menuopt/finaid/screens/tfasap

SAP Criteria

Accesses: PERFORM screen: \$CARSPATH/modules/finaid/screens/tsapcrit

File: \$CARSPATH/menuopt/finaid/screens/tsapcrit

Financial Aid PERFORM (Table Maintenance) Screens

Introduction

Financial Aid uses PERFORM screens for displaying maintenance tables and some records. You can access the screen files in the following directory path:
\$CARSPATH/modules/finaid/screens.

PERFORM

The following lists the PERFORM screens used in Financial Aid.

Note: In the following list, descriptions of PERFORM screens include:

- Purpose of the screen
- Directory location of the screen file
- Menu access location
- Tables used in the screen

1998/99 EDE/Pell screen (edepell98)

Enables you to make manual entries to EDE/Pell records

File: \$CARSPATH/modules/finaid/screens/edepell98

Menu Access: Financial Aid: Pell Payment Editing Menu: 1998 - 99 Pell Pmt Records

Tables/Records Used:

- edepell_rec
- id_rec
- st_table

1997/98 EDE/Pell screen (edepell97)

Enables you to make manual entries to EDE/Pell records

File: \$CARSPATH/modules/finaid/screens/edepell97

Menu Access: Financial Aid: Pell Payment Editing Menu: 1997 - 98 Pell Pmt Records

Tables/Records Used:

- edepell_rec
- id_rec
- st_table

Aid Table (taid)

Enables you to maintain aid codes

File: \$CARSPATH/modules/finaid/screens/taid

Menu Access: Financial Aid: Table Maintenance Menu: Aid Codes

Tables/Records Used:

- aid_form_table
- aid_type_table

Aid Detail Table (taiddtl)

Enables you to maintain enrollment status detail information for an aid code

File: \$CARSPATH/modules/finaid/screens/taiddtl

Menu Access: Table Maintenance: Enrollment Status Tables Menu: Aid Detail

Tables/Records Used:

- aiddtl_table

- aid_table
- faschd_table

Aid Types/Form Table (taidtype)

Enables you to maintain types and forms of aids

File: \$CARSPATH/modules/finaid/screens/taidtype

Menu Access: Financial Aid: Table Maintenance Menu: Aid Types/Forms

Tables/Records Used:

- aid_form_table
- aid_table
- fndg_table
- subt_table

Asset Protect Allowance Table (tapa)

Enables you to maintain asset allowance information

File: \$CARSPATH/modules/finaid/screens/tapa

Menu Access: Financial Aid Need Analysis Table Maintenance Menu: Asset Protect Allow

Tables/Records Used:

- apa_table

Automated Financial Aid Packaging Parameters (ppkg)

Enables you to set parameters for Financial Aid Packaging batch processing

File: \$CARSPATH/modules/finaid/screens/ppkg

Menu Access: Student Processing: Automated Packaging Menu: Packaging Parameters

Tables/Records Used:

- pkg_table
- ppkg_rec

Budget Expense Item Code/Subsidiary Total Code Association Table (tfaexpas)

Enables you to maintain budget expense information

File: \$CARSPATH/modules/finaid/screens/tfaexpas

Menu Access: Table Maintenance: Budget Tables Menu: Expense/Subs.Total Assoc.

Tables/Records Used:

- fa_item_table
- faexpas_table
- subt_table

Business And Farm Net Worth Adjustment Table (tbusfarm)

Enables you to maintain net worth information.

File: \$CARSPATH/modules/finaid/screens/tbusfarm

Menu Access: Financial Aid: Need Analysis Table Maintenance: Bus/Farm Net Worth

Tables/Records Used:

- busfarm_table

Contact Table (tctc)

Enables you to maintain financial aid contacts

File: \$CARSPATH/modules/finaid/screens/tctc

Menu Access: Table Maintenance: Contact/Tickler Menu: Contact

Tables/Records Used:

- ctc_table

Pell RFMS table (formerly EDE/Pell table) (tedepell)

Enables you to make manual entries to Pell RFMS records

File: \$CARSPATH/menuopt/finaid/screens/tedepell

Menu Access: Financial Aid: Pell RFMS menu: RFMS Table Maintenance

Tables/Records Used: None

Enrollment Schedule (tschdsess)

Enables you to maintain enrollment schedule information

File: \$CARSPATH/modules/finaid/screens/tschdsess

Menu Access: Table Maintenance: Enrollment Status Tables Menu: Enrollment Schedule

Tables/Records Used:

- prog_table
- faschd_table
- schdsess_table

Estimated U.S. Tax Table (tfatax)

Enables you to maintain U.S. tax estimate information

File: \$CARSPATH/menuopt/finaid/screens/tfatax

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: Estimated U.S. Tax

Tables/Records Used:

- fatax_table

Financial Aid Budget Item Table (tfaitem)

Enables you to maintain budget item information

File: \$CARSPATH/modules/finaid/screens/tfaitem

Menu Access: Table Maintenance: Budget Tables Menu: Expense Budget Items

Tables/Records Used:

- fa_item_table

Financial Aid Budget Group Table (tbgtgrp)

Allows you to maintain budget group information

File: \$CARSPATH/modules/finaid/screens/tbgtgrp

Menu Access: Table Maintenance: Budget Tables Menu: Budget Groups

Financial Aid Budget Types (tfabgt)

Enables you to maintain budget type information

File: \$CARSPATH/modules/finaid/screens/tfabgt

Menu Access: Table Maintenance: Budget Tables Menu: Budget Types

Tables/Records Used:

- fa_item_table
- fabgt_table
- fabgtas_table

Financial Aid Compliance Tables (tcply)

Enables you to maintain compliance information

File: \$CARSPATH/modules/finaid/screens/tcply

Menu Access: Table Maintenance: Compliance Tables Menu: Compliance Codes

Tables/Records Used:

- id_rec
- aid_table
- cply_crit_table
- cply_req_table
- cply_seq_table
- cplyas_table

Financial Aid Funding Source Table (tfndg)

Enables you to maintain financial aid funding source information

File: \$CARSPATH/modules/finaid/screens/tfndg

Menu Access: Financial Aid: Table Maintenance Menu: Funding Codes

Tables/Records Used:

- fndg_table

Financial Aid Session Table (tfasess)

Enables you to maintain session information for enrollment status

File: \$CARSPATH/menuopt/finaid/screens/tfasess

Menu Access: Table Maintenance: Enrollment Status Tables Menu: Session

Tables/Records Used:

- fasess_table

Financial Aid Status (statusctc)

File: \$CARSPATH/modules/finaid/screens/statusctc

Menu Access:

Tables/Records Used:

- ctc_rec
- ctry_table
- id_rec
- st_table
- title_table

Financial Aid Verification Table (tfaver)

Enables you to maintain verification information

File: \$CARSPATH/modules/finaid/screens/tfaver

Menu Access: Table Maintenance: Verification Table Menu: FA Verification

Tables/Records Used:

- faver_table

FISAP Screen (fisap)

Enables you to view ID, profile, program, financial aid, and FISAP records.

File: \$CARSPATH/modules/finaid/screens/fisap

Menu Access: Reports: FISAP Reports Menu: FISAP Data Entry

Tables/Records Used:

- fisap_rec
- id_rec
- prog_enr_rec
- st_table
- stufa_rec
- title_table

Fund Balance Table (taidpkg)

Enables you to maintain fund balance information

Note: This table (also known as Aid Packaging table) is automatically set up by year, program, and aid code when the aid code is added for the first time for that year and program. You need to set up the allocated amounts in the table for that aid code.

File: \$CARSPATH/modules/finaid/screens/taid

Menu Access: Financial Aid: Table Maintenance Menu: Fund Balances

Tables/Records Used:

- aid_table
- aid_type_table
- aidpkg_table

IM User Defined Options Table (timmeth)

Enables you to maintain user-defined need analysis methodologies

File: \$CARSPATH/modules/finaid/screens/timmeth

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: IM Method Options

Tables/Records Used:

- immeth_table

Income Contribution Table (tinccont)

Enables you to maintain income distribution information

File: \$CARSPATH/modules/finaid/screens/tinccont

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: Income Contribution

Tables/Records Used:

- inccont_table

Income Protection Allowance Table (tipa)

Enables you to maintain income protection allowance information

File: \$CARSPATH/modules/finaid/screens/tipa

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: Income Protect Allow

Tables/Records Used:

- ipa_table

Minnesota State Grant Calculation Table (tmngrnt)

Enables you to maintain Minnesota State Grant information

File: \$CARSPATH/modules/finaid/screens/tmgrnt

Menu Access: Table Maintenance: Packaging Tables Menu: Minn. State Grant Table

Tables/Records Used:

- mngmnt_table

Need Analysis Method Table (tfameth)

Enables you to maintain need analysis methods

File: \$CARSPATH/modules/finaid/screens/tfameth

Menu Access: Financial Aid: Need Analysis Table Maintenance: Need Analysis Methods

Tables/Records Used:

- fameth_table

Packaging Codes (tpkg)

Enables you to maintain packaging codes, objectives, and criteria information

File: \$CARSPATH/modules/finaid/screens/tpkg

Menu Access: Table Maintenance: Packaging Tables Menu: Packaging Codes

Tables/Records Used:

- aid_table
- aid_type_table
- aidpkg_table
- fameth_table
- pkg_table
- pkgobj_table

SAP Track Table (tsaptrk)

Enables you to maintain SAP criteria information for each track

File: \$CARSPATH/modules/finaid/screens/tsaptrk

Menu Access: Table Maintenance: SAP Table Menu: SAP Codes

Tables/Records Used:

- saptrk_table

Criteria Table (tcrit)

Enables you to maintain SAP criteria information for each track

File: \$CARSPATH/modules/finaid/screens/tcrit

Menu Access: Table Maintenance: SAP Table Menu: SAP Criteria

Tables/Records Used:

- crit_table

SAP Criteria Table (tsapcrit)

Enables you to maintain SAP criteria information

File: \$CARSPATH/modules/finaid/screens/tsapcrit

Menu Access: Table Maintenance: SAP Table Menu: SAP Criteria

Tables/Records Used:

- sapcrit_table

Satisfactory Academic Progress Table (tfasap)

Enables you to maintain satisfactory academic progress codes

File: \$CARSPATH/modules/finaid/screens/tfasap

Menu Access: SAP Table Menu: SAP Codes

Tables/Records Used:

- fasap_table

Satisfactory Academic Progress Actions Table (tfasapact)

Enables you to maintain each satisfactory academic progress status action

File: \$CARSPATH/modules/finaid/screens/tfasapact

Menu Access: SAP Table Menu: SAP Codes

Tables/Records Used:

- fasapact_table

State Tax Allowance Table (ttaxallow)

Enables you to maintain state tax allowance information

File: \$CARSPATH/modules/finaid/screens/ttaxallow

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: State Tax Allowance

Tables/Records Used:

- st_table
- taxallow_table

Tickler Table (ttick)

Enables you to maintain tickler codes for financial aid

File: \$CARSPATH/modules/finaid/screens/ttick

Menu Access: Table Maintenance: Contact/Tickler Menu: Tickler

Tables/Records Used:

- tick_table

Update Blank/Invalid Social Security No. In Need Analysis Tape Record (natp)

Enables you to update social security number information

File: \$CARSPATH/modules/finaid/screens/natp

Menu Access: Financial Aid: Need Analysis Tape Conversion Menu: Update Tape/ISIR SS Num

Tables/Records Used:

- id_rec
- natp_rec
- prog_table

Financial Aid SQL Scripts

Introduction

The Financial Aid product contains SQL scripts that perform queries and produce reports from database records. The scripts are located in the following directory path:
\$CARSPATH/modules/finaid/informers.

Note: Csh scripts can call SQL scripts and ACE reports. These SQL scripts and ACE reports do not reside on the CX menu system.

SQL Scripts

The following lists the SQL scripts provided with Financial Aid.

addaidsubs

Creates financial aid table entries to `subt_table`, `subas_table`, and `defer_table` from the `aid_table`.

Note: You can run this script multiple times

Tables/Records Used:

- `aid_table`
- `defer_table`
- `subas_table`
- `subt_table`

Menu Access: Financial Aid: Table Maintenance Menu: After Adding Aid Codes

addproj

Adds financial aid need records for a particular need method and financial aid year. The script adds or updates the expense budget, the total family contribution, and the need.

Tables/Records Used:

- `faneed_rec`
- `stufa_rec`

Menu Access: Student Processing: Automated Packaging Menu: Add Need Records/Fixed Adj

addtcply

Adds compliance tables for a new financial aid year based on the previous years financial aid compliance tables. This script adds compliance association, compliance criteria, compliance requirements, and compliance sequence tables.

Tables/Records Used:

- `cply_crit_table`
- `cply_req_table`
- `cply_seq_table`
- `cplyas_table`

Menu Access: Table Maintenance: Compliance Tables Menu: Copy Compliance Tables

addtctc

Copies the tickler record and contact records from a previous tickler to a new tickler. This is run prior to beginning any processing for a new academic year.

Tables/Records Used:

- `tick_table`

- ctc_table

Menu Access: Table Maintenance: Contact/Tickler Menu: Copy Tick/Contact Tables

addtfameth

Adds fameth_table entries for a new year.

Tables/Records Used:

- fameth_table

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: Create Need Anal. Meth.

addtpkg

Adds new package tables for a new financial aid year based on the previous year's package tables. This script adds the package table, package objective table, and the aid package table.

Tables/Records Used:

- aidpkg_table
- pkg_table
- pkgobj_table

Menu Access: Table Maintenance: Packaging Tables Menu: Copy Packaging Tables

adtfabgtas

Copies fabgtas_table records from a previous financial aid year and period specified to a new financial aid year and period.

Tables/Records Used:

- fabgtas_table

Menu Access: Table Maintenance: Budget Tables Menu: Copy Budget Associations

allowpkg

Sets the stufa_allow_pkg flag to Y before a packaging run.

Tables/Records Used:

- stufa_rec

Menu Access: Student Processing: Automated Packaging Menu: Update Package Allow Flag

cmplpell

Changes the *verification completed* Contact record status to C (complete) when all the required documents for verification have been received. Completes the institutional verification form contact when all the required documents for verification have been received. This script must be customized at each school for the list of verification contacts. This script also updates the stufa_ver_cmpl_date automatically when verification is complete.

Tables/Records Used:

- ctc_rec
- stufa_rec

delsim

Deletes aid simulation records when no longer needed.

Tables/Records Used:

- aid_rec
- aidpkg_table
- stufa_rec

Menu Access: Student Processing: Automated Packaging Menu: Delete Simulation Records

dopkg

Completes the *ready-to-be-packaged* Contact record by updating the status of the PACKAGE contact from *expected* to *completed* when a set of contacts in the document tracking system are also completed. This script must be customized at each site so the required document list is valid.

Tables/Records Used:

- ctc_rec

edepell

Selects students to be reported in Pell Payment EDE processing. This script adds contacts for those students to be reported. This script adds contacts for all students with a Pell award in the award year specified.

Note: This script is not valid after the 1998-99 financial aid award year.

Tables/Records Used:

- aid_rec
- aid_table

edfatflag

Indicates the Financial Aid office's receipt of a Financial Aid transcript for a specific institution by updating the flag in the Education record.

Tables/Records Used:

- ctc_rec
- ed_rec

fatctc

Uses Contact records to add student Financial Aid transcript requests to the document tracking system.

Note: The script uses the correspondent ID to link the name of the institution with the Contact record.

Tables/Records Used:

- ctc_rec
- ed_rec
- stufa_rec
- sch_rec

loanctc

Adds expected loan Contact records when corresponding loan application received Contact records are completed in the document tracking system.

*Tables/Records Used:*ctc_rec

sarctc

Indicates the receipt of the Pell Student Aid Report (SAR) contacts by adding Contact records to the document tracking system. The script adds the Contact record for receipt of the Pell when the Pell Student Aid Index (SAI) is equal to or less than 2000. (SAI is valid for 1992 - 1993 academic year processing only.)

- ctc_rec
- faneed_rec

selsapids

Selects students that are to have the financial aid satisfactory academic progress (SAP) process run on them.

Notes:

- You can modify this script to select on any criteria. The base product looks at the sap field in the aid_table. If the value is “Y” and the student has been awarded this aid for the previous session and year, the student is selected for SAP. A contact “SELCTSAP” with an expected status is added to the student with the passed tickler.
- You can set up any contact you want. You may also change the informer so various groups are identified and each group has a different selection contact added. In this case, the parameter for a contact can be removed from the selection menu option because the contact is incorporated into the informer.

Tables/Records Used:

- adm_rec
- aid_rec
- ctc_rec
- ctc_table
- stufa_rec

Menu Access: Financial Aid: SAP Processing Menu: Select SAP IDs

statctc

Selects and adds FASTAT contacts for the status letter based on expected contacts printed on the status letter. The logic for selection is the same as the ltrfastat ace report.

Tables/Records Used:

- ctc_rec
- ctc_table

Menu Access: Document Tracking: Letters Menu: Select Status Letters - All

sumcomp

Combines all the necessary statistics across site in order to perform compliance checking.

Tables/Records Used:

- acad_sum_rec
- statsum_rec
- stu_acad_rec
- stu_stat_rec
- stufa_rec

Menu Access: Reports: Aid Reports Menu: Add Compliance Statistics

typectc

Deletes non-applicable contacts by deleting Contact records (with a status of *expected*) for students meeting institutional-defined parameters.

Note: You must customize this script for contact names, categories (if used) and programs before used.

Tables/Records Used:

- ctc_rec
- profile_rec
- stufa_rec

updfisap

Defaults required fisap information fields.

Tables/Records Used:

- deg_table
- ed_rec
- prog_enr_rec
- site_rec
- stu_acad_rec
- stufa_rec

Menu Access: Reports: FISAP Reports Menu: Update Initial Values

updpgamt

Moves actual awarded and disbursed amounts into the packaging simulation table before running packaging so that students are not overawarded.

Tables/Records Used:

- aidpkg_table

Menu Access: Student Processing: Automated Packaging Menu: Update Simulated Pkg Amts

updrfms

Updates Pell RFMS statuses by batch number. This allows your institution's financial aid office to retransmit a given batch to CPS if necessary.

Tables/Records Used:

- pelldisb_rec
- edepell_rec

verctc

Adds verification contacts for students selected for institutional verification by adding verification. This script must be customized at each institution. When customizing this script, be sure to check for duplications before the first add.

Tables/Records Used:

- ctc_rec
- stufa_rec

voidctc

voids all remaining document tracking contacts (with a status of *expected*) when a student's aid package is rejected, denied, or nullified.

*Tables/Records Used:*ctc_rec

Financial Aid Csh Scripts

Introduction

Financial Aid contains Csh scripts to automate the processing of information. Csh scripts are UNIX-based program statements that can execute a series of SQL scripts or reports. The Financial Aid Csh scripts are located in the following directory path:
\$CARSPATH/modules/finaid/scripts.

Csh Scripts

The following list associates a Financial Aid menu option with the corresponding Csh script and provides a description of the script.

Note: In the following list, descriptions of Csh scripts include:

- Purpose of the script
- A list of SQL statements used, if applicable
- A list of ACE reports used, if applicable
- A list of tables used, if applicable
- Menu access option, if applicable

adjaid

Adjusts financial aid award amounts. You run this script prior to running the Post Financial Aid process.

Reports:

- A report that generates ISQL commands

SQL Scripts:

- A SQL script that updates aid_rec amounts and inserts ctc_recs.

Tables/Records Used:

- aid_rec
- ctc_rec

docrev

Runs the financial aid document tracking processing SQL scripts at one time.

CAUTION: When modifying this script, be careful about changing the running order for the SQL scripts. Because the *dopkg* and *cmplpell* scripts depend upon contacts added and/or updated by the other SQL scripts, Jenzabar recommends the docrev Csh script runs these SQL scripts last.

SQL Scripts:

- dopkg
- cmplpell
- edfatflag
- fatctc
- statctc
- loanctc
- sarctc
- typectc
- voidctc
- verctc

Menu Access: Financial Aid: Document Tracking Menu: Document Review Script

esarin

Reads in files received from EDE software, parses the data using *tpfaconvt*, and loads the data in CX database using *natp* processing.

Tables/Records Used:

- natp_rec

Menu Access: Financial Aid: EDE Processing Menu: Input ISIR Data

pcsend

Exports CX files to a PC. You must run this script on a PC using a telnet session to the UNIX host. The script creates a directory on the PC to store the files collected from CX.

pcxmit

Transfers three financial aid files to a PC using a file transfer protocol specified by the user, then renames the files.

pheaa_aid

Adds/updates actual aid records based on the pheaa_rec state grant and the pheaa_rec Pell grant. The script runs *faudit* to update aid fund balances and student aid totals.

Reports:

- A report that creates output from the PHEAA state grant tape information
- A report that creates output from the PHEAA Pell grant tape information

SQL Scripts:

- A SQL script that adds/updates aid simulation records for the state and Pell grants

Menu Access: Financial Aid: Need Analysis Tape Conversion Menu: PHEAA State/Pell Grant

pheaaconv

Extracts need analysis data from a PHEAA tape.

Tables/Records Used:

- pheaa_rec

pheaagrnt

Adds aid simulation records based on the pheaa_rec state grant.

Reports:

- A report that creates output from the PHEAA state grant tape information

SQL Scripts:

- A SQL script that adds/updates aid simulation records for the state grant

Tables/Records Used:

- pheaa_rec

prepfisap

Builds fisap_recs based on subt_recs at the end of the year for FISAP reports.

Reports:

- A report that creates output from processing subt_recs

SQL Scripts:

- A SQL script that builds the fisap_recs

Tables/Records Used:

- fisap_rec
- subt_rec

Menu Access: Reports: FISAP Reports Menu: Create FISAP Reports

prtext

Prints contents of financial aid text files.

Menu Access: Financial Aid: Student Processing Menu: Print Text Comments

refctc

Creates refund check contacts.

Tables/Records Used:

- ctc_rec

rfmid

Loads RFMS disbursement acknowledgements from CPS.

Tables/Records Used:

- edepell_rec
- pelldisb_rec

Menu Access: Financial Aid: Pell RFMS Menu: Pell RFMS Import - Disb

rfmio

Loads RFMS original acknowledgements from CPS?.

Tables/Records Used:

- edepell_rec

Menu Access: Financial Aid: Pell RFMS Menu: Pell RFMS Import - Orig

rfmsimport

Loads original Pell RFMS and Pell RFMS Disbursement acknowledgments from CPS.

Tables/Records Used:

- edepell_rec

runaudit

Executes an ACE report in the audit database.

Reports: A report that reads the audit database.

runfisap

Translates UNDG_PROG and GRAD_PROG tags in a report before you run the report.

Reports: Specified by the user.

tpext

Converts the tape data file and loads the information in the natp_rec.

Tables/Records Used:

- natp_rec

Menu Access: Financial Aid: Need Analysis Tape Conversion Menu: Extract Need Tape Data

Financial Aid ACE Reports

Introduction

CX contains ACE reports for easy reporting of Financial Aid database information. The ACE reports are grouped in the following categories:

- Aid
- Aid Transactions
- CWSP
- FISAP
- Audits
- Document Tracking
- Refundable Aid
- Automated Packaging
- Pell RFMS (formerly EDE/Pell)
- NATP
- Financial Aid Loan
- Reports not associated with a menu

Note: This section does not include the table reports, located in the `$CARSPATH/modules/finaid/reports`.

Aid Reports

The following lists the reports accessed from the Reports: Aid Reports Menu.

Aid By Code

Lists all students and aid they have been offered for all sessions.

File: `$CARSPATH/modules/finaid/others/aidcoderpt`

Aid By Funding Source

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

File: `$CARSPATH/modules/finaid/reports/aidcampus`

Aid For No-Shows

Lists aid awarded to no-show students.

File: `$CARSPATH/modules/finaid/reports/aidnoshow`

Aid For Part-Time Students

Lists students who are part-time and receiving aid.

Note: The report does not determine if the aid received is eligible for part-time status.

File: `$CARSPATH/modules/finaid/reports/parttime`

Aid History By Code

Summarizes each financial aid awarded to a student with the disbursed amounts.

Note: This report runs based on the `aid_rec`. If there is a `subt_rec` without a corresponding `aid_rec`, that `subt_rec` will not be reflected in this report.

File: `$CARSPATH/modules/finaid/reports/fahistsum`

Aid History By Year

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.

Note: This report runs based on the aid_rec. If a subt_rec exists without a corresponding aid_rec, that subt_rec will not be reflected in this report.

File: \$CARSPATH/modules/finaid/reports/fahist

Award Offers

Lists all students and aid they have been offered for all sessions and their aid statuses.

File: \$CARSPATH/modules/finaid/others/aidrpt

Bridge Enrollment

Prints a biographical form for the id_no specified.

File: \$CARSPATH/modules/regist/reports/fabridge

Changes in Registration

Lists registration changes as of a specific date.

File: \$CARSPATH/modules/regist/reports/regchg

Charges Paid By Aid

Lists the aid amounts that pay for specified charges.

File: \$CARSPATH/modules/finaid/reports/aidchg

Enrollment Variance

Lists the aid amounts that pay for specified enrollments.

File: \$CARSPATH/modules/finaid/reports/enrvar

Fund Balances

Lists packaging table amounts that are currently available.

File: \$CARSPATH/modules/finaid/reports/tpkgamt

Need Analysis Status

Lists students with their financial aid need analysis results. The following parameters change the report's format:

- blank - Lists students with any methodology
- A - Lists students with adjusted contributions
- O/Y - Lists students with official contributions
- P - Lists students with professional discretion contributions
- N - Lists students with unofficial contributions

File: \$CARSPATH/modules/finaid/reports/needlist

Summary Aid By Code

Lists a summary of financial aid, sorted by aid code.

File: \$CARSPATH/modules/finaid/others/sumcoderpt

Aid Transactions

The following lists the reports accessed from the Reports: Aid Transactions menu.

Amounts Paid By Code

Lists all students who have received a certain Financial Aid for a certain period.

File: \$CARSPATH/modules/finaid/reports/codfatot

Amounts Paid By Student

Lists all students who have received a specified Financial Aid for a specified period.

File: \$CARSPATH/modules/finaid/reports/stufatot

Students Owing Refund

Lists the aid amounts that pay for specified refunds.

File: \$CARSPATH/modules/finaid/reports/aidrfd

Transactions/Paid By Code

Lists all transactions for each student who has received Financial Aid for a certain period.

File: \$CARSPATH/modules/finaid/reports/codfatotr

Transactions/Amounts Paid

Lists all transactions for each student who has received Financial Aid for a specified period.

File: \$CARSPATH/modules/finaid/reports/stufatottr

CWSP Reports

The following lists the reports accessed from the Payroll/Personnel: College Work Study Program menu.

Student Payroll Ledger

Prints a Student Payroll Ledger sorted by student.

File: \$CARSPATH/modules/payroll/reports/prstuldgr

Student Payrolls - Summary

Prints a Summary of Student Payrolls. The report uses the payroll codes of CWSP and INST.

File: \$CARSPATH/modules/payroll/reports/sumstupr

Student Work Study Aid

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.

File: \$CARSPATH/modules/payroll/reports/wsneedrpt

FISAP Reports

The following lists the reports accessed from the Reports: FISAP Reports menu.

Dep. Eligible for Aid

Lists eligible dependent aid applicants for award year.

File: \$CARSPATH/modules/finaid/others/eligdep

Eligible For Aid - Detail

Lists eligible aid applicants for award year. The report gives details on depending status, zero EFC, degree, total income, full-time status, and program for each applicant.

File: \$CARSPATH/modules/finaid/others/testelig

FISAP Data Audit

Lists audit fields needed for fisap reports.

File: \$CARSPATH/modules/finaid/others/fisapau

FISAP Report - Detail

Lists fiscal operations and application to participate information to verify FISAP Test Report Number 1.

File: \$CARSPATH/modules/finaid/others/testtot

FISAP Report Grid

Lists audit fields needed for fisap reports.

File: \$CARSPATH/modules/finaid/others/fisaptot

Indep. Eligible for Aid

Lists eligible independent aid applicants for award year.

File: \$CARSPATH/modules/finaid/others/eligindep

No Need/No Income

Lists students without income or need amounts.

File: \$CARSPATH/modules/finaid/reports/noneedinc

Students Not Attending

Lists all students who have not been in attendance during any of the session parameters. This report assists in updating the stufa_attended field for fisap reporting at end of year.

File: \$CARSPATH/modules/finaid/reports/noattend

Missing Data Audit

Lists students with missing data that have fisap records. These students would be students missing from the fisaptot report.

File: \$CARSPATH/modules/finaid/others/totaudit

Financial Aid Audits

The following lists and describes the reports contained in the Financial Aid: Audits menu and the Financial Aid Audits Reports menu.

Aid Record

Lists an audit of the Aid record.

File: \$CARSPATH/modules/finaid/reports/audaid

FA Trans Verification

Verifies that the Financial Aid table has been set up correctly to print the financial aid transcript.

File: \$CARSPATH/modules/finaid/reports/chktrans

Note: This report appears in the Financial Aid: Audits menu.

Need Analysis Form

Lists an audit of the Need Analysis Form record.

File: \$CARSPATH/modules/finaid/reports/audnaf

Student Financial Aid

Lists an audit of the Student Financial Aid record.

File: \$CARSPATH/modules/finaid/reports/audstufa

Student Financial Aid Need

Lists an audit of the Financial Aid Need record.

File: \$CARSPATH/modules/finaid/reports/audfaneed

Transaction Audit History

Reports on the individuals who have updated financial aid records.

File: \$CARSPATH/modules/finaid/reports/stuaudit

Note: This report appears in the Financial Aid: Audits menu.

Document Tracking Reports

The Financial Aid product contains reports that track the statuses of students' Contact records. For example, document tracking reports track what documents have been submitted, what documents need to be submitted, and how many times reminder letters have been sent to a student. The following lists and describes the reports contained in the Document Tracking: Reports menu.

Contact Range

Lists all students with these contact resources by tickler, program, and status. The report selects contacts based on a range of contact codes.

File: \$CARSPATH/modules/finaid/reports/ctcrange

Contact Status

Lists contacts in name order for a given tickler, program, and status. The report prints out the name for corresponding ID.

File: \$CARSPATH/modules/finaid/reports/ctcstatus

Outstanding FA Transcripts

Prints all the institution's outstanding or expected Financial Aid transcript requested for each student.

File: \$CARSPATH/modules/finaid/reports/transreq

Package Termination

Prints information about all students who have awards that have been rejected, denied, or nullified.

File: \$CARSPATH/modules/finaid/reports/termaid

Ready to Package

Prints information about students who have submitted all the required documents and are ready to be packaged.

File: \$CARSPATH/modules/finaid/reports/package

Verification

Prints information about students who have completed institutional verification.

File: \$CARSPATH/modules/finaid/reports/pellverify

Note: You can use any type of contacts in this report.

Refundable Aid Reports

The following lists and describes the reports contained in the Refundable Aid: Reports menu.

Enrollment Variance-Fund

Prints enrollment verification lists for students.

File: \$CARSPATH/finaid/reports/enraid

Note: This report also appears in the Reports: Aid Reports menu.

Refund Eligible-Fund

Menu Access: Refundable Aid Menu: Reports: Refund Eligible-Fund

File: \$CARSPATH/accounting/others/rfnd

Refund Eligible-Student

Produce a proof list of students with a refund due to be processed in the next check run.

File: \$CARSPATH/accounting/others/rfnd

Refund Check-Fund

Menu Access: Refundable Aid Menu: Reports: Refund Check-Fund

File: \$CARSPATH/accounting/others/rfnd

Refund Check-Student

Produce a list of student refund checks

File: \$CARSPATH/accounting/others/sturfd

Automated Packaging Reports

The following lists and describes the reports contained in the Student Processing: Automated Packaging menu.

Fund Balances Report

Lists current financial aid fund balances.

File: \$CARSPATH/modules/finaid/reports/tpkgamt

Print Aid Simulations

Lists aid simulations for a range of simulation codes, sorted by student.

File: \$CARSPATH/modules/finaid/reports/aidsim

EDE/Pell Report

The following lists and describes the report contained in the Financial Aid: Pell Payment Processing menu.

Note: The following report is not valid after the 1998-99 financial aid award year.

Student Payment Report

Lists data in the EDE/Pell record. After running the EDE/PELL program of the Electronic Data Exchange Pell Payment Reporting (EDE/PELL) process, you can run the EDE/PELL ACE report to print out some or all of the records in the EDE/PELL record (edepell_rec).

File: \$CARSPATH/modules/finaid/reports/edepell

RFMS Report

The following lists and describes the report contained in the Financial Aid: Pell RFMS menu.

RFMS Record Report

Lists data in the Pell RFMS records. Use this report to verify the accuracy of the information in the Pell RFMS records (edepell_rec) and the Pell RFMS Disbursement records (pelldisb_rec).

File: \$CARSPATH/modules/finaid/reports/rfms

RFMS Exceptions Report

Lists data in the Pell disbursement amounts. Use this report to preview disbursement amounts prior to executing the Create Disburse Records program. You can also use this report to view the previous disbursement amounts and the total Pell award amounts for each student.

File: \$CARSPATH/modules/finaid/reports/rfmsexcptn

Need Analysis Tape Report

The following lists and describes the report contained in the Financial Aid: Need Analysis Tape Conversion menu.

Leads from Applicant Info.

Lists names from the natp_rec.

File: \$CARSPATH/modules/finaid/reports/natplead

Financial Aid Loan Reports

The following lists and describes the reports contained in the Loan Tracking: Reports menu.

Loan Status Comparison Report

Lists financial aid loans that have achieved the minimum status, but not the maximum status you specify. This report displays each student's name, beginning and ending dates of the school year, and the specifics of the financial aid loan(s) for each student.

File: \$CARSPATH/modules/finaid/reports/loanCmpr

Disbursement Roster Report

Lists the financial aid disbursements posted to the student's account. This report displays the student's name, social security number, type of financial aid loan, the date of the disbursement, and the amount of the disbursement.

File: \$CARSPATH/modules/finaid/reports/disbRoster

Loan Disbursement Exception Report

Identifies exceptional loan disbursement amounts such as loans that are guaranteed for an amount different than expected or loans disbursed for an amount different than they were guaranteed. Included are loans that disbursed but never guaranteed, or released but never disbursed.

File: \$CARSPATH/modules/finaid/reports/loanDisbAmt

ACE Reports Not Found in Menus

The following reports do not appear on the CX menu system because they are used only in Csh scripts. The reports are located in the following directory paths:

- \$CARSPATH/modules/finaid/others
- \$CARSPATH/modules/finaid/reports

91acttp-93acttp

Defines the format for the tape received from ACT. *Tpcnvt* uses the report to place the values in the natp_rec.

91csstp-98csstp

Defines the format for the tape received from CSS. *Tpcnvt* uses the report to place the values in the natp_rec.

93fedtp-00fedtp

Defines the format for the tape received from the Federal government. *Tpcnvt* uses the report to place the values in the natp_rec.

93gesesar-00gesesar

Defines the format for the tape received from the Federal government (GES). *Tpcnvt* uses the report to place the values in the natp_rec.

91pheatp-00pheatp

Defines the format for the tape received from PHEAA. *Tpcnvt* uses the report to place the values in the natp_rec.

adjaid

Lists adjustments in students' aid based on information from the Deferment record.

chktrans

Checks and validates aid codes to be printed on the financial aid transcript form. The report prints all codes where `taid_trans_print = "Y"` and sorts them in order by `taid_trans_ctg`.

misrpt

Creates a Financial Aid MIS list.

pheaa_aid

Creates a SQL script to add state grant aid records from aid information on the pheaa tape. This process only adds records when there is a match between the `pheaa_ssno` and the `id_rec_ssno` fields.

pheaa_pell

Creates a SQL script to add pell grant aid records from aid information on the pheaa tape. This process only adds records when there is a match between the `pheaa_ssno` and the `id_rec_ssno` fields.

pheaa_st

Creates a SQL script to add state grant aid records from aid information on the pheaa tape. This process only adds records when there is a match between the `pheaa_ssno` and the `id_rec_ssno` fields.

pheaagrnt

Creates a SQL script to add PHEAA state grant awards to the package simulation records. This process only adds simulation records when there is a match between the `pheaa_ssno` and the `id_rec_ssno` fields.

prtext

Lists serial numbers from the `stufa_rec` to be used in a script to print context of financial aid text files.

refctc

Creates `ctc_recs` for students with a specified minimum number of registered hours.

sumcoderpt

Lists a summary of aids by code.

Financial Aid Award Notices and Letters

Introduction

CX contains standard letters for the correspondence needs of the Financial Aid product. The letter files are located in the WPVI filecabinet: wp/fin_aid/FileCabinet/letters.

Associated ACE Report

ACE reports create the standard financial aid forms and letters. The following ACE report (located in the \$CARSPATH/modules/finaid/reports directory) is located with the standard financial aid letters:

Financial Aid Cover letter

ltrfacover

Document Tracking Letters

The following lists and describes the standard CX Document Tracking letters.

Financial Aid Denial letter

Used to inform a student that he/she is not eligible for need-based financial aid.

Financial Aid Nullification letter

Used to inform a student, who has previously been awarded financial aid, that a change has occurred to nullify the student's financial aid.

Financial Aid Rejection Confirmation letter

Used to receive confirmation that a student has rejected all offered financial aid.

Financial Aid Status letter

Used to request documents or actions from a student.

Associated Letter ACE Reports

ACE reports create the standard Document Tracking Letters. The following lists each ACE report (located in the \$CARSPATH/modules/finaid/reports directory) associated with the standard financial aid letters.

Financial Aid Denial letter (FADENY)

ltrterm

Financial Aid Nullification letter (FANULLY)

ltrterm

Financial Aid Rejection Confirmation letter (FAREJECT)

ltrterm

Financial Aid Status letter (FASTAT)

- ltrfastat
- ltrstatctc

Note: The system uses the ltrstatctc ACE report when you want to track the FASTAT letter to produce financial aid letters.

SECTION 15 - CUSTOMIZING THE FINANCIAL AID PROCESSES

Overview

Introduction

This section provides procedures for implementing and customizing the features of the Financial Aid product. The following information is included:

- Cross-functional issues
- Reviewing data in tables and records/Setup sequence
- Field specific information for building the following tables:
 - Primary tables
 - Enrollment Status tables
 - Budget tables
 - Contact/Tickler tables
 - Satisfactory Academic Progress tables
 - Compliance tables
 - Packaging tables
 - Optional tables
- Setting up/Disabling EDE processing
- Setting up a Work-Study Payroll
- Setting up Document Tracking
- Setting up Check Refunding
- Setting up award notice forms
- Setting up Financial Aid Loan
- Installing the Financial Aid product

General Reference Information

This section contains detailed procedures specific to the Financial Aid product. For information on performing general procedures such as using the MAKE processor and reinstalling options, refer to the following resources:

- *Database Tools and Utilities* course notebook
- *CX Implementation and Maintenance Technical Manual*

Cross-Functional Issues

Introduction

As you implement each application within the Financial Aid product, various policy issues will arise about which you must make decisions. However, in addition to issues affecting strictly the Financial Aid office, there are other issues that involve various offices at an institution. The following lists some of these issues, as well helpful information you can use in deciding how to resolve each issue.

Cross-Functional Issues List

The following lists cross-functional issues, as well as a description of each, that should be addressed while implementing the Financial Aid product.

Access to financial aid and ID records

To ensure that individuals outside a particular office are able to access financial aid records efficiently and cost-effectively, while guarding against misuse of this ability to access information, answer the following questions:

- Which department/individuals will be given access to the aid records?
- Which departments and/or individuals require permission to add and/or update student aid records?
- Which departments and/or individuals require permission to display student aid records and the extent of the information required by each?

Entry of Social Security numbers in ID records

For the Financial Aid Need Analysis process to work, social Security numbers in ID records must contain hyphens (e.g., 123-45-6789).

Automated Aid Recalculation

The Automated Aid recalculation process relies on several Financial tables, which must be correctly set up and maintained. The Registration staff must also understand how the Automated Aid recalculation process functions and when additional action on their part may be required.

Creation of need analysis and aid information records

To decide how the institution wishes to create need analysis and aid information records (e.g., Electronic Data Exchange (EDE) or tape submissions of need analysis records), answer the following questions:

- How does the institution choose to handle those prospective students whose first contact with the school is through the Financial Aid office?
- How does the Financial Aid office want to obtain their student need analysis information?
- How often and/or rapidly does the Financial Aid office want to obtain their student need analysis information?

Loans

To determine if other offices have responsibilities in connection with the student loan programs, answer the following questions:

- Which office oversees the signing of promissory notes for loan programs?

Note: Jenzabar recommends the Business office for this function.

- Which office is responsible for posting student loan proceeds to the student accounts?

Posting of student aid funds

To determine the responsibility for posting student aid funds, answer the following question: Which office is responsible for posting (disbursing) the student aid funds to the student's account?

Note: Typically the Financial Aid office determines eligibility for a student to receive the funds, and the Business office controls the posting process.

Refunds of student aid

To determine which office/department is responsible for refunds of student aid, answer the following questions:

- Which office determines the amount of an individual's student aid refund in the event aid is awarded in excess of the direct costs?
- Which department is responsible for generating the student's excess student aid refund check?
- Which office determines what aid source(s) allow excess amounts to be refunded to the student?
- Which office determines priorities if a student has more than one source of aid that allows refunds of the excess amounts to go to the student?
- Which office determines if an aid can be used for specific fees?
- If more than one aid can be used for the same fee, what official determines the priority for which aid will pay/cover the fee?

Treatment of scholarships

To determine which department is responsible for scholarship issues, answer the following questions:

- Which department is responsible for selecting scholarship recipients?
- How does the institution want to communicate scholarship offers, deadlines, and acceptances between departments?
- Which department is responsible for disbursing and monitoring scholarship funds?

Work programs

To determine which department is responsible for work programs, answer the following questions:

- Which office issues student payroll checks?

Note: Jenzabar recommends the Business or Payroll office for this function.

- Which office monitors the earnings of a student and determines when an award has been utilized to the maximum?

Reviewing Data in Tables and Records

Introduction

After assessing features of Financial Aid and setting the appropriate enable macros, you must review the setup of CX tables and records.

Procedure

The following procedure provides the steps to review the values of CX tables and records.

1. For each Financial Aid table, review the codes supplied with CX. Determine whether or not the codes meet the needs of your institution. Make updates as appropriate.
2. Review the institution's records converted from the previous Financial Aid system. Determine whether or not the records need to be updated to meet the needs of CX reports. Make updates as appropriate.

Table Set Up Sequence

The following lists the sequence in which you should set up the Financial Aid tables. Information about setting up each of the tables below follows in this section. The Financial Aid Tables appear in the Financial Aid: Table Maintenance menu.

Note: For reference information about the tables listed below, see the *Financial Aid Tables and Records* section in this manual.

1. Aid Type table (aid_type_table)
2. Aid Form table (aid_form_table)
3. Funding Source table (fndg_table)
4. Aid table (aid_table)
5. Fund Balance (Aid Packaging Criteria) table (aidpkg_table) ***Optional***

Note: The system uses the aidpkg_table for financial aid packaging processes. You can also optionally set up this table to identify and set up aid codes that have specific fund limitations. For example, compliance processes can check the table's fund balances for maximum lifetime amounts.

6. Enrollment Schedule table (faschd_table)
7. Enrollment Status Session table (schdsess_table)
8. Aid Detail table (aiddtl_table)
9. Financial Aid Session table (fasess_table)
10. Financial Aid Expense Item table (fa_item_table)
11. Financial Aid Budget table (fabgt_table)
12. Financial Aid Expense Association table (fabgtas_table)
13. Budget Group table (bgtgrp_table)
14. Budget/Group Association table (bgtgrpas_table)
15. Financial Aid Budget Expense Association table (faexpas_table) ***Optional***
16. Tickler table (tick_table)
17. Contact table (ctc_table)

18. SAP Track table (saptrk_table)
19. Financial Aid SAP table (fasap_table)
20. SAP Action table (fasapact_table)
21. Criteria table (crit_table)
22. SAP Criteria table (sapcrit_table)
23. Compliance Association table (cplyas_table)
24. Compliance Requirements table (cply_req_table)
25. Compliance Sequence table (cply_seq_table)
26. Compliance Criteria table (cply_crit_table)
27. Packaging Method table (pkg_table)
28. Package Objective table (pkgobj_table)
29. Aid Packaging Criteria table (aidpkg_table)
30. Verification table (faver_table)

Building the Primary Financial Aid Tables

Introduction

Most of the processes in the Financial Aid product use the following Financial Aid tables to control data entry and to provide necessary information for financial aid processing:

- Aid Type table (aid_type_table)
- Aid Form table (aid_form_table)
- Funding Source table (fndg_table)
- Aid table (aid_table)
- Fund Balances table (aidpkg_table)

You must build these tables before performing any financial aid processing and before building any other financial aid tables.

Access

You access the primary tables from the Financial Aid: Table Maintenance menu.

Aid Type Table

The following lists the fields in the Aid Type table in the order in which you complete them. To access this table, select Aid Types/Forms from the Financial Aid: Table Maintenance menu.

Aid Type Code

A code that identifies a type of aid (e.g., JOB, LOAN, GRNT).

Description

A description of the aid type.

Priority

An integer used to prioritize the aid types used in automated packaging of financial aid. The priority sort takes lower numbers (e.g., 0) to be higher priority than higher numbers (e.g., 100).

Aid Form Table

The following lists the fields in the Aid Form table in the order in which you complete them. For each aid type code defined in the Aid Type table, you can enter values for the forms of each aid type. To access this table, select Aid Types/Forms from the Financial Aid: Table Maintenance menu. Select the **Table** command.

Aid Form Code

A code that identifies an aid form. The system uses this value to identify an aid code with an aid form in the aid_table.

Description

A description of the aid form.

Funding Table

The following lists the fields in the Funding table in the order in which you complete them. To access this table, select Funding Codes from the Financial Aid: Table Maintenance menu.

Funding Source Code

A code that identifies a financial aid funding source. This value is associated with an aid code in the aid_table.

Description

A description of the funding source.

Campus Based Funds

A logical flag used to note whether or not this aid funding source is campus-based. Financial Aid reports use this field.

Aid Table

The following lists the fields in the Aid table in the order in which you complete them. To access this table, select Aid Codes from the Financial Aid: Table Maintenance menu.

Aid Code

A code used to identify a financial aid award. For financial aid disbursed to student accounts, the system uses the code as the tot code in the `subt_table` to identify the financial awards posted to student accounts.

Description

A description of the aid code.

Additional Desc

A description of the `aid_table.aid` field. You can use this description on the award notification form produced by *faentry* to further identify or explain an award.

Funding Source

A code used to identify the funding source for a financial aid. This code must exist in the `findg_table`.

Aid Form

A code used to identify the aid's form (e.g., scholarship, assistantship, tuition waiver, campus job). This code must exist in the `aid_form_table`.

Default Aid Status (Ad)

A code that defines a default aid amount status used when the aid is added for the first time in any session. You can use any valid aid status value.

Default Amount Status (Am)

A code that defines the default aid amount status code used when an aid is added for the first time in any session. The only valid values that can be entered are AA for Actual Amount status and EA for Estimated Amount status.

Default Aid Packaging Status (Pk)

A code that defines the default aid packaging status used when an aid is added in any session for the first time. Valid values are either A for Allow Packaging status or M for Manual Packaging status.

Default for Unmet Need

A logical flag that indicates whether or not an aid code should be added by default to each student with an amount equal to the unmet need of the student. If you enter Y, *faentry* will assign this aid code to each student with an amount equal to the unmet need of the student. If more than one aid code contains a Y in this field, *faentry* will prompt for each code before defaulting the unmet need.

Print on SDS Bill

A logical flag indicating whether or not an aid is to be printed on the Student Data Sheet (SDS).

Apply Against SDS Bill Charges

A logical flag indicating whether or not an award amount is to count as an applied award on the student's SDS Bill. When an award amount is an applied award on the SDS Bill, the system subtracts the award amount from the amount the student owes.

Post to Student Accounts

A logical flag indicating whether or not an aid is to be posted to students' accounts.

Use Aid ID Number

A code indicating whether the system should use the aid ID number. Valid values are:

- I - ID# only
- N - Not used
- S - Subsidiary Account Posting

Is this a PELL award code?

A logical flag indicating whether or not an aid is a Pell award code.

Award Notice: Print Category

A code indicating where aid will print on the award notice. Valid values are: A, B, C, D, E.

Award Notice: Print Priority

An integer indicating the order, within category, the aid will print on the award notice.

Award Notice: Foot Note Symbol

The symbol referring to a footnote associated with this aid.

Transcript: Print on FA Trans

A logical flag indicating whether or not an aid code is to be printed on the Financial Aid Transcript form.

Transcript: Section D Order

An integer identifying the line on the Financial Aid Transcript where an aid code is to be printed. The value of the field is an integer value of 1 through the maximum number of types of aid to be printed.

Example: Section D print order: 1=PELL, 2=SEOG, 3=PERK/NDSL, 4=ICL, 5=SSIG, 6=Other

The macro MAX_FA_TRANS_CTG in the \$CARSPATH/include/custom/finaid file defines the maximum. You can enter duplicates on this field to allow more than one aid code to be summarized on the same transcript line.

Percentage Applied?

The percentage of award amount to be applied to a student's bill. Enter a percentage that is less than 100 and greater than 0.

Use in Automated Packaging

A logical flag indicating whether or not this aid should be packaged by *faentry* when automatically packaging financial aid.

Continuing Aid

A logical flag that allows an aid to be continued from one financial aid year to the next when packaging a student based on last year's financial aid package.

Allow Recalculation

A logical flag that allows an aid to be automatically recalculated. Valid values are Y, N, and W (during 100% refund period). Using either Y or W in this field requires an entry in the Deferment table.

Is this a SAP award code?

A logical flag indicating that an aid be considered for Satisfactory Academic Progress processing.

Fund Balance Table Setup

This table is optional in the setup of the Financial Aid product. Financial Aid enables the storage of two kinds of fund balances, including:

- Aid actually awarded
- Projected aid for tracking use of funds for a simulation or packaging code.

The institution can accumulate projected amounts using automated packaging under the packaging method code, before the package is installed as Aid records. The system accumulates amounts in Aid records as actual, or ACT, fund balance types in the Financial Aid tables. When you install simulated aids, the system updates figures for ACT fund balances. Because of this feature, you must set the Fund Balance tables for actual aid (using the ACT fund balance type), as well as for any packaging methods that you define.

You can build the Fund Balance tables in one of two ways:

- The Financial Aid office enters the allocation and restrictions for an aid. In this case, the system checks this information when your awarding is done.
- The Financial Aid office does *not* enter the allocation for an aid and all the restrictions. In this case, the system creates a table entry for an aid the first time the aid is awarded in any year. The system simply accumulates the totals awarded, disbursed, and canceled because the allocation and restrictions information for an aid is not available.

Fund Balance Table (Aid Packaging Criteria Table)

The following lists the fields in the Fund Balance table in the order in which you complete them. To access this table, select Fund Balances from the Financial Aid: Table Maintenance menu.

Notes:

- Using this table, you can set up contacts to be added by the system annually or by session. The system adds these contacts when the aid code is awarded.
- For use in Document Tracking, you can add year and/or session contacts for particular aid codes.

Aid Year

The Financial Aid award year (e.g., 9697).

Program

The academic program (e.g., UNDG) associated with the fund.

Category

The aid funding category (e.g., NEW or RET). This value which can be blank, allows a further breakdown within an academic program to store and use different fund allocations for various categories of students (e.g., returning, non-returning students).

Aid Code

The Aid table code associated with the fund.

Aid Pkg Code

You cannot access this field when accessing the table using the Fund Balances menu option.

Aid Type

The Aid type code associated with the fund.

Recommended Awd

The recommended award amount to be used by the Financial Aid Packaging program.

Minimum Award

The minimum dollar amount that can be awarded from the fund.

Increment Amount

The dollar amount increment of aid used by the packaging program.

Amt Allocated

The amount allocated for this aid for this year.

Pct to Award

The percentage of the allocated amount to award.

Maximum/Life

The lifetime maximum amount of this aid that can be awarded a student.

Maximum/Year

The maximum amount of this aid that can be awarded a student this year.

(Annual Contacts) Code

The award year contact to be created when a student is awarded this aid.

(Annual Contacts) Status

The default status for this contact. Valid values are:

- C - Completed
- E - Expected

(Session Contacts) Code

The session contact to be created when a student is awarded this aid.

(Session Contacts) Status

The default status for this contact. Valid values are:

- C - Completed
- E - Expected

Awarded

The sum of the student awards for the packaging method.

Note: This field is updated automatically by the packaging program, and displays current fund balances.

Canceled

This field is not used for packaging simulations.

Note: This field is updated automatically by the packaging program, and displays current fund balances.

Disbursed

This field is only used for actual financial awards and displays current fund balances.

Note: This field is updated automatically by the packaging program, and displays current fund balances.

Building the Enrollment Status Tables

Introduction

The processes controlling enrollment scheduling in the Financial Aid product use the following Financial Aid tables:

- Enrollment Schedule table (faschd_table)
- Enrollment Status Session table (schdsess_table)
- Aid Detail table (aiddtl_table)
- Financial Aid Session table (fasess_table)

You must build these tables after building the Primary Financial Aid tables and before the Financial Aid Budgeting tables.

Access

You access the Enrollment Status tables from the Table Maintenance: Enrollment Status Tables menu.

Enrollment Schedule Table

The following lists the fields in the Enrollment Schedule table in the order in which you complete them. To access this table, select Enrollment Schedule from the Table Maintenance: Enrollment Status Tables menu.

Enrollment Schedule Status

A code that describes the enrollment schedule status. Standard values are:

- F - Full-time enrollment
- H - Half-time enrollment
- L - Less than half-time enrollment
- T - Three quarter time
- W - Withdrawal

Description

A description of the enrollment schedule status code.

Enrollment Status Session Table

The following lists the fields in the Enrollment Status Session table in the order in which you complete them. For each enrollment schedule status code defined in the Enrollment Schedule table, you can enter values for an enrollment status session. To access this table, select Enrollment Schedule from the Table Maintenance: Enrollment Status Tables menu. Select the **Table** command.

Program

The program code for the enrollment schedule status.

Session

The session code for the enrollment schedule status.

Year

The year for the enrollment schedule status.

Financial Aid Year

The Financial Aid award year code for the enrollment schedule status.

Minimum Hours

The minimum number of hours for this enrollment schedule status.

Aid Detail Table

The following lists the fields in the Aid Detail table in the order in which you complete them. To access this table, select Aid Detail from the Table Maintenance: Enrollment Status Tables menu.

Aid Code

The aid code (e.g., PELL for Pell Grant) to associate this enrollment schedule detail information.

Enrollment Schedule Status

The enrollment schedule status value (e.g., F for Full-time) to associate with the aid code.

Financial Aid Year

The Financial Aid award year (e.g., 9697) for the enrollment status.

Amount/Percent

The annual percentage or amount to award for this aid and enrollment.

Amount Type

The type of amount entered in the Amount/Percent field. Valid values are:

- P - Percentage
- D - Dollar

Financial Aid Session Table

The following lists the fields in the Financial Aid Session table in the order in which you complete them. To access this table, select Session from the Table Maintenance: Enrollment Status Tables menu.

Session

The session code (e.g., FA for Fall).

Year

The calendar year associated with the session.

Financial Aid Year

The Financial Aid award year (e.g., 9697) associated with the session and year values.

Last Day For 100% Refund

The last date (e.g., 03/01/1996) in the session in which a student is entitled to a full refund.

Last Day in Refund Period

The last date (e.g., 04/01/1996) in the session in which a student can receive a percentage of a refund.

Full Time ISAC Tuition

The full time tuition to be used for ISAC (Illinois Student Assistance Commission) awards.

Half Time ISAC Tuition

The half time tuition to be used for ISAC (Illinois Student Assistance Commission) awards.

Minimum Full Time Hours

The minimum hours for the full time ISAC (Illinois Student Assistance Commission) awards.

Minimum Half Time Hours

The minimum hours for the half time ISAC (Illinois Student Assistance Commission) awards.

Building the Budget Tables

Introduction

Financial Aid Need Analysis uses the following Financial Aid tables to process and control financial aid budgets in the Financial Aid product:

- Financial Aid Expense Item table (fa_item_table)
- Financial Aid Budget table (fabgt_table)
- Financial Aid Expense Association table (fabgtas_table)
- Budget Group table (bgtgrp_table)
- Budget/Group Association table (bgtgrpas_table)
- Financial Aid Budget Expense Association table (faexpas_table) ***Optional***

Financial Aid Need Analysis uses the tables to identify the various institutional expense budgets and to default student expense budgets when assigning budgets to students. Before setting up the tables, the Financial Aid office must map out and review its existing budgets.

You must build these tables after building the Enrollment Status tables and before the Common tables.

Access

You access the Budget tables from the Table Maintenance: Budget Tables menu.

Mapping Existing Budgets

Jenzabar recommends that the Financial Aid office map out and review the standards of its existing budgets. Budget standards are mapped by taking consideration for the various types of budgets, including special areas, such as the following:

- Dependent or independent
- Off campus or on campus
- Veterans
- Medical
- Lawyer

Enrollment Levels of Existing Budgets

After the Financial Aid office maps out its standards, it must consider enrollment levels, such as the following:

- Full time
- Half time
- Three Quarter time
- Less than Half time

Each budget standard must have an applied level of enrollment.

Budget Table Setup Issues

Consider the following issues before building the Budget tables.

Required tables

To fully set up financial aid budgets, the following tables are required:

- Financial Aid Budget Item table (fa_item_table)
- Financial Aid Budget table (fabgt_table)
- Financial Aid Budget Item Association table (fabgtas_table)
- Budget Group table (bgtgrp_table)

- Budget/Group Association table (bgtgrpas_table)

Setup sequence

You must set up the Financial Aid Budget Item table (fa_item_table) before the other required tables.

Optional table

The Financial Aid Budget Expense Association table (faexpas_table) is an optional table setup. You can use the table to compare budgeted costs to actual costs. You cannot set up this table until the Business office assigns Subsidiary Total codes.

Associating budgets and enrollment levels

The Budget Group and Budget/Group Association tables create budgets group values for various enrollment levels. The system uses the tables to recalculate a student's financial aid budget when the student changes his enrollment status. For example, for a budget type code, *Commuter*, you could enter the following entries in the Budget Group table:

- Commuter - full time
- Commuter - half time
- Commuter - 3/4 time
- Commuter - less than half time

The Budget/Group Association table associates a budget group code with a budget item code.

Financial Aid Expense Item Table

The following lists the fields in the Financial Aid Expense Item table in the order in which you complete them. To access this table, select Budget Expense Items from the Table Maintenance: Budget Tables menu.

Budget Item Code

A code that represents a budget item (e.g., BOOK for book expenses).

Description

A description of the budget item code.

Direct Cost

A logical flag that indicates whether or not to charge the costs for this budget item to the student.

Print on Award Notice

A logical flag that indicates whether or not to print the budget item on the award notice.

Financial Aid Budget Table

The following lists the fields in the Financial Aid Budget table in the order in which you complete them. To access this table, select Budget Types from the Table Maintenance: Budget Tables menu.

Budget Type Code

A code that represents a budget type (e.g., L/DEP/FT for Local/Dependent/Fulltime).

Budget Type Description

A description of the budget type code.

Budget Duration (months)

The duration of the budget type in months.

Intended Enrollment Level

The enrollment level intended for the budget type (e.g., F for Full-time).

Additional Budget Type Description

The optional, additional description for the budget type entry to be used in reporting.

Financial Aid Expense Association Table

The following lists the fields in the Financial Aid Budget table in the order in which you complete them. For each budget type code defined in the Financial Aid Budget table, you can enter associated values for budget and expense. To access this table, select Budget Types from the Table Maintenance: Budget Tables menu. Select the **Table** command.

Financial Aid Year

The Financial Aid award year (e.g., 9697) associated with the budget type.

Session

The session code (e.g., FA for Fall) for the budget/item association.

Item Code

The budget item code from the budget item table for the budget/item association.

Amount

The dollar amount for this budget item.

Print Order Number

An integer to indicate the order number of the print/display order for this budget/item.

Budget Group Table

The following lists the fields in the Budget Group table in the order in which you complete them. To access this table, select Budget Groups from the Table Maintenance: Budget Tables menu.

Budget Group Code

A code used to identify a budget group (e.g., C/IND/PT for Commuter/Indep/Parttime).

Budget Group Description

A description of the budget group code.

Budget/Group Association Table

The following lists the fields in the Budget/Group Association table in the order in which you complete them. For each budget group code defined in the Budget Group table, you associate the budget group with a budget type. To access this table, select Budget Groups from the Table Maintenance: Budget Tables menu. Select the **Table** command.

Budget Type Code

The budget type code associated with the budget group code.

Budget Code Description

A description of the budget type code.

Financial Aid Budget Expense Association Table

The following lists the fields in the Financial Aid Budget Expense Association table in the order in which you complete them. To access this table, select Expense/Subs. Total Assoc. from the Table Maintenance: Budget Tables menu.

Award Year

The Financial Aid award year (e.g., 9697) associated with the budget type.

Budget Item Code

The budget type code (e.g., BOOK for books and supplies) to associate with the subsidiary total code.

Subsidiary Total Code

The subsidiary total code (e.g., BOOK for Bookstore Charge) to be associated with the budget item code.

Building the Contact/Tickler Tables

Introduction

The Document Tracking processes in the Financial Aid product use the following common tables:

- Tickler table (tick_table)
- Contact table (ctc_table)

Before beginning to set up these tables, determine what items need to be tracked, and for which groups of students. Each item, or action, will be a contact. You should add contacts for all students and for special cases.

You must build these tables after building the budget tables and before building the satisfactory academic process tables.

Note: See *Setting up Document Tracking* in this section for additional information on setting up Document Tracking in the Financial Aid product.

Access

You access the Contact/Tickler tables from the Table Maintenance: Contact/Tickler menu.

Tickler Table

The following lists the fields in the Tickler table in the order in which you complete them. To access this table, select Tickler from the Table Maintenance: Contact/Tickler menu.

Code

A code that identifies the financial aid award year. The code must be in the following form: *FY##*. The code's numbers are the first two digits of the award year (e.g., FY96 is the tickler code for the 9697 award year).

Note: You must enter a tickler code for each financial aid year.

Description

A description of the tickler code.

Contact Table

The following lists the fields in the Contact table in the order in which you complete them. To access this table, select Contact from the Table Maintenance: Contact/Tickler menu.

Note: You must annually define contacts in order to link the contacts to the tickler code for the award year.

Code

A code that identifies the type of contact (e.g., FASTAT for Financial Aid Status letter).

Description

A description of the contact code.

Tickler

The tickler code (e.g., FY96) to associate with the contact.

Comm Code

A code that describes the type of communication (e.g., LETT for letter) involved with the contact.

Routing

The routing of the contact. Valid values include:

- I - Incoming

- O - Outgoing

Ace Report

The file name of the ACE report that uses the contact (e.g., ltrfastat for Financial Aid Status letter).

Note: If you use an ACE report as selection criteria for letter production, you must modify that report in regard to contacts.

Run Code

The ADR runcode (e.g., SINGLE) for the contact.

Building the Satisfactory Academic Progress Tables

Introduction

The Satisfactory Academic Progress processes in the Financial Aid product use the following tables:

- Financial Aid SAP Track table (saptrk_table)
- Financial Aid SAP table (fasap_table)
- SAP Action table (fasapact_table)
- Criteria table (crit_table)
- SAP Criteria table (sapcrit_table)

You must build these tables (in the sequence shown above) after building the Contact/Tickler tables and before building the Compliance tables.

Before You Begin

These tables are institutional specific. Before you set up these tables, you need to identify the following types of information:

- How many tracks are you going to define to establish a track or group of students (i.e., registration, financial aid, and scholarship)?
- What specific criteria is required for each track or group of students?

Access

You access the Satisfactory Academic Progress tables from the Table Maintenance: SAP Table menu. The Financial Aid SAP Track table, Financial Aid SAP table, and the SAP Action table appear on a single screen under the SAP Code menu option. The Criteria table and SAP Criteria table appear on another screen under the SAP Criteria menu option. These two tables have a master/detail relationship.

Financial Aid SAP Track Table

Use this table to define valid codes for every track, including:

- FINAID
- REGIST
- SCHOLAR
- VETERANS

You enter the track name first, and then enter a description for that track. The following lists the fields in the Financial Aid SAP Track table in the order in which you complete them. To access this table, select FA SAP from the Table Maintenance: SAP Table menu.

Active Date

Date the SAP track is valid

Description

SAP track description

Inactive Date

Date the SAP track is no longer valid

SAP Track Code

A code to define a valid SAP track

Financial Aid SAP Table

Use this table to define valid SAP codes for each specific track. You can use the same SAP code for multiple tracks, including:

- PASS
- FAIL
- WARN
- APPL (appeal approved)
- FSAP (fail SAP)
- PSAP (pass SAP)

The following lists the fields in the Financial Aid SAP table in the order in which you complete them. To access this table, select FA SAP from the Table Maintenance: SAP Table menu.

SAP Track

A code that identifies a track for SAP processing

SAP Code

Date the SAP track is valid

SAP Description

A description of the valid SAP status code.

Satisfactory Academic Progress code

A code used to identify a status for academic process (e.g., SAPP and Passed SAP).

SAP Action Table

Use this table to define actions to be performed on a student based on the students' previous and current SAP status. Possible actions include,

- Adding contacts for letters
- Updating an aid status on a specified aid code
- Running stored procedures
- Changing a SAP record
- Nullifying aid in future terms

Note: Multiple types of actions can be assigned in the same record. You could have entries that do actions using fewer than all the action fields.

The following lists the fields in the SAP Action table in the order in which you complete them. To access this table, select FA SAP from the Table Maintenance: SAP Table menu. Select the Table command.

SAP Track

A valid SAP track (e.g., FINAID).

Current SAP Code

The current Satisfactory Academic Progress code (e.g., PSAP, FSAP) for the student.

Previous SAP Code

The previous Satisfactory Academic Progress code (e.g., FSAP) for the student.

Contact

The contact (e.g., FAPROB for a student to receive a probation letter) that the SAP process will create for this satisfactory academic process status.

Aid Code

The aid code (e.g., PELL for Pell Grant) associated with this satisfactory academic process status that you will want the aid status for some upcoming term to be changed to 'Hold' or 'Nullified' by the SAP Action process.

Aid Status

The new status for the aid code entered in the previous field.

Procedure

The name of the stored procedure that the SAP process will run for this satisfactory academic process status. You can use stored procedures to add or modify other system fields, such as the admissions status.

On Action Change SAP Code To

The new SAP code to assign to the student. For example, a student was in good standing with a SAP code/status of 'Good', they pass SAP which creates a 'Pass' code/status for the term/year. You might want the SAP Action process to change the 'Pass' to 'Good'.

Criteria Table

Use this table to define criteria codes that you will use for each track, including:

- CHRS
- GEN
- GPA
- GRAD
- PHRS
- ROOT
- SCHL
- UNDG

The following lists the fields in the Criteria table in the order in which you complete them. To access this table, select SAP Criteria from the Table Maintenance: SAP Table menu.

Notes:

- You can have multiple layers of SAP Criteria codes associated with the Parent SAP Criteria Code. All entries at the same level must have the same operator (AND/OR).
- You must have one Parent SAP Criteria Code named ROOT for each track. This entry is used by the SAP program to identify the beginning point for the SAP process path for the specified SAP track code.
- You must have an entry in this table for any code you plan to use in the SAP Criteria table.

Parent SAP Criteria Code

A code that identifies a parent or root criteria for SAP processing.

Description

A description of the parent SAP criteria code.

SAP Criteria Table

You can use the SAP Criteria Table to define how the criteria codes logically relate. You can define the relationship between the Parent SAP Criteria Code and the SAP Criteria Code, the AND/OR operator conditions, and whether a stored procedure is associated with the SAP criteria code.

Note: The SAP Criteria Code that has ROOT as the parent will not have an operator or procedure value.

CAUTION: If you are creating a SAP Criteria code that is going to be a parent to establish a set of criteria, you will enter only the SAP Criteria Code and the Operator value. Leave the Procedure value blank. To be a valid value in the procedure field of this table, the procedure must exist in the \$CARSPATH/procedures/student directory on the system.

The following lists the fields in the Criteria table in the order in which you complete them. To access this table, select SAP Criteria from the Table Maintenance: SAP Table menu. Select the Table command.

Sap Criteria Code

The SAP criteria code that corresponds to the parent SAP criteria code.

Operator

A logical operator (e.g., AND, OR) used to associate a stored procedure.

Procedure

The name of a stored procedure (e.g., fasapcumhrs) to run , if appropriate.

Note: The stored procedure allows database programs to be precompiled and packaged within the database. Each stored procedure is defined in a file in the following directory path: \$CARSPATH/procedures/student.

SAP Table Examples

Introduction

The following is an example of a student's SAP table. This table consists of two tracks, FINAID and SCHOLAR. The saptrk_table has two entries, FINAID and SCHOLAR, including a description of each. This example shows the FINAID track.

Previous SAP	Current SAP	Outcome	Actions
Blank/GOOD	PASS FAIL	GOOD PROB	Contact for a probation letter
PROB	PASS FAIL	PROB SUSP	Contact for suspension letter Aid Code entries, e.g., PELL SEOG. Aid Status = 'H'old
APPL (appeal, approved, or on appeal)	PASS FAIL	PROB SUSP	Contact for suspension letter Aid Code entries, e.g., PELL SEOG. Aid Status = 'H'old
SUSP	PASS FAIL	PROB TERM	Contact for terminating aid letter Aid Code entries, e.g., PELL SEOG. Aid Status = 'N'ullify

In this example, the SAP table (fasap_table) has the entries: PASS, FAIL, GOOD, SUSP, APPL, TERM, PROB, and a blank entry (indicating SAP hasn't previously been checked on the student).

The SAP Action table (fasapct_table) has entries defining the type of actions requested. You can input the information from the table you created into the action table.

If you only want to change the status of certain aid codes, you enter an Aid code and an Aid Status. For example, if you want to nullify the INST and PERK because the student is on Probation, the table will show two identical entries, with two different aid codes (INST and PERK) each with the Aid Status field of 'N'ullify. You might have a stored procedure created that would identify ALL the aid the student had been awarded and change all the aid statuses to 'H'old.

The criteria for this FINAID track example requires a minimum GPA, maximum number of cumulative hours attempted, and a specific percent of attempted hours to be completed.

Criteria Table Example

The Criteria table (crit_table) example includes the following entries.

Parent SAP Track	Parent SAP
FINAID	Criteria Code
FINAID	ROOT
FINAID	GEN
FINAID	GPA
FINAID	CHRS
FINAID	PHRS
SCHOLAR	ROOT
SCHOLAR	SCHL

SAP Criteria Table Example

The SAP Criteria table (sapcrit_table) example includes the following entries.

<u>Parent SAP Track</u>	<u>Parent SAP Criteria Code</u>	<u>SAP Criteria Code</u>	<u>Operator</u>	<u>Procedure</u>
FINAID	ROOT	GEN	AND	sapgpa
FINAID	GEN	GPA	AND	sapgpa
FINAID	GEN	CHRS	AND	sapcumhrs
FINAID	GEN	PHRS	AND	saphrspct
SCHOLAR	ROOT	SCHL		
SCHOLAR	SCHL	SGPA	AND	schlgpa (if you use AND here, you must
				have at least one entry like the following):
SCHOLAR	SCHL	GEN	AND	

Building the Compliance Tables

Introduction

The processes controlling compliance testing in the Financial Aid product use the following Financial Aid tables:

- Compliance Association table (cplyas_table)
- Compliance Requirements table (cply_req_table)
- Compliance Sequence table (cply_seq_table)
- Compliance Criteria table (cply_crit_table)

You must build these tables after building the SAP tables and before the Financial Aid Packaging tables.

Access

You access the Compliance tables by selecting Compliance Codes from the Table Maintenance: Compliance Tables menu.

Compliance Association Table

The following lists the fields in the Compliance Association table in the order in which you complete them. The table associates compliance requirements with an aid code, an aid funding code, or all financial aid codes. The aid funding code allows the same compliance requirements to be used on every aid from the funding source. This is useful for state or federal funded awards that have the same overall compliance requirements for each aid.

Award Year

The financial aid award year for this compliance association.

Type

Specifies that this compliance association is for an aid code or an aid funding code. The valid values are:

- A - when using aid codes or ALL
- F - when using funding codes

Code

A code that is either an aid code (from the aid_table), a funding code (from the fndg_table), or ALL to associate the compliance requirements with any financial aid code. This code identifies which aid or fund a compliance requirement is to be associated with for compliance checking. When you use ALL, the system checks all associated compliance requirements on all award codes awarded to students.

Require to Award

A logical flag that indicates whether or not the compliance association must be satisfied at the time of awarding the aid.

Require to Disburse

A logical flag that indicates whether or not the compliance requirement indicated must be completed before an aid is disbursed. If there is more than one requirement associated with an aid or fund, all requirements with a Y in this field must be completed before an aid can be disbursed.

Compliance Requirement Table

The following lists the fields in the Compliance Requirement table in the order in which you complete them. The table defines the requirements that must be completed before compliance is

met. All the requirements for an aid or funding must be completed before an aid passes compliance.

Requirement Code

A code identifying the requirement and used in the `cplyas` table to associate an aid or fund with a compliance requirement. The code is unique within a financial aid year.

Desc

The description of the requirement code.

Compliance Sequence Table

The following lists the fields in the Compliance Sequence table in the order in which you complete them. The system uses this table to associate compliance criteria records with a compliance requirement. You can break down sequences into sets of sequences using a sequence number. A requirement must have at least one sequence set completed. For a sequence set to be completed, each criteria in the sequence must be completed.

Sequence Number

A numeric that identifies a sequence set that must be completed to satisfy a compliance requirement.

Outcome

Indicates the desired outcome of the criteria test. If the criteria test's outcome must be true to satisfy a sequence, enter T. If the outcome of the criteria test should be false, enter F.

Partial Record

A logical operator that indicates whether or not this row is associated with another row.

Partial Record Label

A four character ID that associates the various partial rows.

Note: Associated records must have the same label.

Compliance Criteria Table

The following lists the fields in the Compliance Criteria table in the order in which you complete them. The table defines the compliance test criteria used to verify if a student completes the compliance requirements for a financial aid. The table defines compliance tests which *faentry* uses to compare individual student data.

Criteria Code

A code that identifies a compliance criteria test. This code is unique within a financial aid year.

Code Desc

A description of the criteria code.

File

A file code identifying the database record in which student data is to be looked up by Financial Aid Entry. The valid file codes that can be used are:

<u>File Code</u>	<u>Database File</u>	<u>Session Value</u>	<u>Year Value</u>
ACAD	stu_acad_rec	Yes	Yes
ACSU	acadsum_rec	Yes	Yes
ADM	adm_rec	YEAR	0
CTC	ctc_rec	YEAR/Yes	0/Yes
ID	id_rec	YEAR	0
NAF	naf_rec	YEAR	0
NEED	faneed_rec	YEAR	0
PENR	prog_enr_rec	YEAR	0
PROF	profile_rec	YEAR	0
SERV	stu_serv_rec	Yes	Yes
STAT	stu_stat_rec	YEAR	0
STSU	statsum_rec	YEAR	0
SUFA	stufa_rec	YEAR	0
TRAN	fatran_rec	YEAR	0

Note: The Session and Year fields should contain the values as indicated above so Financial Aid Entry can find the correct record for the test. The files marked yes, need to have a session and year entered into these fields. The others should have the session code of YEAR and a year value of 0.

Database Field

The actual database field name in the named file whose value is to be tested on. Any field name in the file can be used except for the ctc_rec, which can only use the ctc_rec.resrc field. Financial Aid Entry for compliance checking on contacts, needs to know only that the ctc_rec for the indicated contact code has been added.

Stored Procedure

The name of a stored procedure (e.g., comdepfm) to run, if appropriate.

Note: The stored procedure allows database programs to be precompiled and packaged within the database. Each stored procedure is defined in a file in the following directory path: \$CARSPATH/procedures/student.

Test Operator

A relational operator used to compare the database value found with the test value. Valid values are:

<u>Operator</u>	<u>Description</u>
=	Equal to
!	Not equal to
<	Less than
>	Greater than

Test Value

A value that is compared to the actual database value in the criteria test. If the test value is a numeric value, only use numeric digits and a decimal point if needed. For example, the test on a dollar amount of \$1,000.00, enter 1000.00 into the field. Do not enter \$1,000.00.

Default Value

A value used for the compliance test in case the student does not have the indicated record. This feature is useful to allow assumed values to be used for incoming students who have not been added to the system.

Session

A value that identifies the academic session code (e.g., FA, FALL) for records based on session and year values. Financial Aid Entry uses this value to look up students' records that are added for each academic session. Also, if a session is entered, the compliance test

is restricted to aid awarded in the indicated session. Records not based on session and year values should have the key word YEAR in this field.

Year

The calendar year (e.g., 1997) for records based on session and year values. Financial Aid Entry uses this value to look up student's records which are added for each academic session. Records not based on session and year values should have a zero in this field.

Method

Identifies the need analysis method to be checked when looking at the faneed_rec. This field is used only when the tcplycrit_file code is NEED.

Tickler Code

The tickler code (e.g., FY96) for which contact records are to be found. This field is used only when the File field code is CTC to look up Contact records.

Site

The site for records based on site. Financial Aid Entry uses this value to look up student's records that are added for each academic session.

Stored Procedures for Compliance and SAP Processing

Introduction

Stored procedures add more complex search features to a program or process. Stored procedures can perform multiple checks at the same time in one or multiple tables, and in multiple fields within each table.

Financial Aid Entry uses stored procedures in compliance checking. Satisfactory Academic Progress (SAP) processing uses stored procedures for checking aspects of a student's academic records. Additionally, Jenzabar CX has provided a sample stored procedure for you to use as a guideline for creating your own custom stored procedures.

Setting Up Stored Procedures

For the compliance checking and SAP processing, you must specify stored procedures in the maintenance tables for each process. Each maintenance table contains a *Procedure* field for specifying a stored procedure. The SAP Compliance process uses a SAP table entry code that specifies a stored procedure.

You must set up the stored procedures for SAP processing to match the standards for academic process defined at your institution.

Note: For more information on setting up these maintenance tables, see *Building the Compliance Tables* and *Building the Satisfactory Academic Progress Tables*.

Financial Aid Stored Procedures

The following lists the stored procedures provided with the Financial Aid product.

fa_sample

A template stored procedure used to create custom stored procedures for compliance.

fasapcumhrs

A SAP stored procedure for checking a student's cumulative hours.

fasapcurhrs

A SAP stored procedure for checking a student's current hours.

fasapgpa

A SAP stored procedure for checking a student's Grade Point Average (GPA).

Building the Financial Aid Packaging Tables

Introduction

The Financial Aid Packaging processes in the Financial Aid product uses the following tables:

- Packaging Method table (pkg_table)
- Package Objective table (pkgobj_table)
- Aid Packaging Criteria table (aidpkg_table)

You must build these tables after building the Compliance tables and before building the optional tables.

Access

You access the Financial Aid Packaging tables by selecting Packaging Codes from the Table Maintenance: Packaging Tables menu.

Aid Table

The Aid table defines all the financial aids awarded using CX. You must make settings in the following Financial Aid Packaging table fields that affect Financial Aid Packaging.

Package Aid

A logical flag indicating whether or not the aid can be packaged through automated packaging. Not all aids must be included in the automated packaging process, but those included must have a Package Aid flag of Yes.

Continuing Aid

A logical flag that tells the system it can evaluate this aid and award it to a student when the user indicates that the projection should be based upon the last year's package. If the Continuing Aid flag is Yes, and if you indicate that the new package should look like the old one, then the system will try to project a package that includes the same aids in roughly the same proportions to the total awarded as was the case for the prior year's package.

Default Packaging Status

The default packaging status for an aid. The valid values are:

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

These values tell Financial Aid Packaging whether it can package/repackage an aid (if the flag is A) or if it cannot modify an aid which had been entered for a student (if the flag is M). In general, those aids with which Financial Aid Packaging can work should have a value of A in this field. This is only a default, however, and you can update this value to M when entering an aid for a student if that aid is to be preserved through the packaging process.

Note: The packaging status for an aid appears in the main Financial Aid Entry screen in the Pk column. Use the **Toggle** command to toggle from the Am (Amount) status to the Pk (Package) status for the aid.

The Packaging status indicates the packaging resource (e.g., a user or the computer) and protects an aid during the automated packaging.

Using the Package Codes Screen

The following describes the sections of the screen.

Packaging Method Table

Where you define the packaging codes, year, and program. In addition, you set the limits for how much of a student's need will be packaged for this method.

Objectives Table

Where, for each simulation code, you define objectives by aid type (e.g., work, loan, grant) defined in the Aid Type table. The objectives indicate what percentage of the package each objective should comprise. You also set the order in which the system is to evaluate these objectives, as well as the minimum and maximum amounts that are to be awarded for all aids that fall under this aid type.

Aid Packaging Criteria Table

Where you enter the criteria for awarding each aid included in the packaging method. You also set the order in which the aids are evaluated by the system, along with the fund balance information for that aid. If multiple packaging codes are defined and used, it is important to divide the allocation for a particular aid among those codes to avoid over expenditure of funds.

Current Fund Balances

Where the screen displays current fund balances maintained by the system. This section contains Awarded, Disbursed and Canceled amounts.

Defining Packaging Methods

Before beginning to build the Financial Aid Packaging tables, your institution must determine one or more financial aid packaging methods for each award year and academic program (e.g., UNDG). A packaging method defines:

- The objectives for determining the types of financial aid that will make up an aid package
- The financial aids used to fulfill the criteria

You can define any number of packaging methods, such as for groups of students, for awarding federal campus based awards, for institutional awards, and for special modeling simulations.

Ensure that your institution has determined the following when defining packaging methods:

- The types of financial aid (e.g., grant) to comprise the package method
- The priority of each aid type (e.g., grant, loan), and then the priority of each specific aid program (e.g., Pell grant)
- The percentages of aid to package (e.g., 50% grant, 25% loan, 25% work)
- The amounts of aid to package (i.e., minimum, maximum, etc.)
- The need analysis methodology to use (e.g., Federal Methodology)
- If used, the groups in which to separate students within an academic program

Note: Your institution can package financial aid by distributing financial aid loans, grants, and institutional work programs based on percentages. Your institution can also package financial aid by prioritizing financial aid loans, grants, and institutional work programs. A financial aid package set up in this manner completely distributes a priority award, then shifts to the next award in priority until the aid awards run out.

Packaging Requirements Example

The following example shows packaging requirements settings:

- Maximum amount of aid to package is \$9000.00
- Package breakdown is to be 20% job, 30% loan, and 50% grant aid
- The financial need will be according to Federal Methodology

Setting Package Objectives

After you have entered the packaging method, enter the package objectives in the Package Objectives table. The Package Objectives table establishes the maximum amounts and the mix

or ratio of types of aid for this packaging method. Not all types of aid must be included in a packaging method and defined by an objective for a method.

The package objectives set the constraints for the overall maximum amount of financial aid that can be packaged, and also, the proportions of aid types used to make up the package. The maximum amount that can be packaged under a packaging method is the total of the maximum amounts of each objective within a method.

Package Objectives Example

The following example requires that Financial Aid Packaging formulate a package of financial aid in the proportions of 20% jobs, 30% loans, and 50% grants. Therefore, you must add three objective entries, one for each of the stated aid types. Since \$9000.00 is the largest amount of aid that Financial Aid Packaging can package in this example, the following chart shows how Financial Aid Packaging determines the objective maximum amounts using the stated objective percentages.

<u>Objective</u>	<u>Package Percentage</u>	<u>Maximum</u>
Jobs	20%	\$1800 (20% times 9000)
Loans	30%	\$2700 (30% times 9000)
Grants	50%	<u>\$4500 (50% times 9000)</u>
		\$9000

Setting Aid Package Criteria

You define the financial aid packaged under each objective in the Aid Package Criteria record. The Aid Package Criteria table defines:

- Each financial aid that can be packaged
- The priority of packaging
- The maximum and minimum amounts
- The recommended amounts
- The rounding increment
- The allocation amount

The table also includes a fund balance total to monitor how much aid has been awarded or simulated for the students packaged under the method.

When setting up the Aid Package Criteria table, consider the following:

- The packaging algorithm packages aid with higher priorities before lower priority aid. Therefore, you should set as the highest priority, financial awards that have the largest fund allocations, and aid that most students are to receive.
- The recommended amounts be a non-zero value. The packaging algorithm attempts to use a recommended award amount first in formulating an aid package. Typically, Financial Aid Packaging awards higher priority awards in amounts very close to the recommended amounts. The use of recommended amounts provides the ability to set *average* amounts that students are to receive for any award. This allows an award to be distributed to more students. You can set the recommended amount anywhere between the minimum and maximum amounts.

Aid Package Criteria Example

The following example is the PMOD packaging method.

<u>Obj</u>	<u>Code</u>	<u>Pct</u>	<u>Prior</u>	<u>Minimum</u>	<u>Maximum</u>	<u>Recommend</u>	<u>Incr</u>
JOB		20.0%	1	400	1,200		
	FW-S		5	200	2,500	1,500	10
LOAN		30.0%	2	200	2,000		
	NDSL		1	200	4,500	1,500	100
	GSL		2	100	4,000	1,500	5

	LOAN		3	100	2,000	500	5
GRNT		50.0%	3	100	6,000		
	SEOG		3	100	4,000	750	10
	ACAD		5	50	500	300	5
	GEN		6	100	1,000	0	10
	DES		8	50	500	300	10

Note: For the grants objective (GRNT), four awards are listed: SEOG, ACAD, GEN, DES. The packaging algorithm will award SEOG first since it is the highest priority aid. Since the recommended amount is \$750, the packaging algorithm will attempt to use an amount of \$750 or close to \$750. However, to fulfill the objective amount, the process might not package lower priority awards using the recommended amounts.

Packaging Method Table

The following lists the fields in the Packaging Method table in the order in which you complete them.

Method

The code used to reference this packaging method (e.g., PMOD) and a text field for a description of the method code.

Aid Year

The financial award year in which students are to be packaged.

Need

Identifies the need analysis method used for calculating for total family contribution; generally, this should be FM (federal methodology). Other need codes are EFM (estimated federal methodology), depending on the Est Prime FC (Estimated Family Contribution) value, or IM (institutional method).

Simulation

Flag that indicates if the packaging method is a simulation or not. All packaging methods must have a Y in this field.

Program

The academic program code (e.g., UNDG) of students to be packaged under this method.

% to Package

The percentage of financial need to be packaged. You can use a different percentage amount to over-package or under-package students for any packaging method.

Unmet Amount

The remaining unmet need to be left unpackaged. If both the Unmet Amount field and the % to Package field are non-zero, the packaging program packages up to the percentage specified and attempts to leave at least the specified unmet amount unpackaged.

Summary Criteria

A code used to link a set of aid package criteria records to more than one packaging method; to associate aid package criteria from another packaging method, enter the other method code; otherwise, leave blank. The criteria will be further governed by the objectives for the current method. If there are Aid Package Criteria records associated with a packaging method with a summary criteria code entered, any associated packaging criteria will be ignored. Thus, when the summary criteria code contains a value, the criteria records matching the summary criteria code will override the packaging method's criteria records.

Package Objectives Table

The following lists the fields in the Package Objectives table in the order in which you complete them.

Aid Type

The aid type code used for the objective.

% to Package

The objective percentage multiplied by the amount to package amount to derive the objective amount for each student. For example, if a student's amount to package is \$2000, the package objective for grants for the student is \$1000 (50% times \$2000) following the above example.

Variance

The percentage figure used to assist the packaging algorithm in getting a feasible solution. For the packaging algorithm to be most effective, the variance percentage gives a range of feasible solutions so that the desired objectives can be met. The student's objective amount of \$1000 is multiplied by the variance percentage to obtain the variance amount. If the variance amount for grants is \$50 (\$1000 times 5%), then the objective range of feasible values for grants is \$950 through \$1050.

Minimum

The amount used to set a minimum amount of financial aid that can be awarded for the objective.

Maximum

The amount used to set the objective's maximum amount of financial aid that can be awarded for the objective's aid type. For a student with an amount to package that exceeds the maximum amount that can be packaged, this constraint allows a maximum to be set on the amount of aid granted. The maximum aid that can be packaged for any student for a packaging method is the sum of each objective's maximum amount.

Priority

The ranking priority of the objectives when displayed and processed for packaging. Priority evaluation ranges from 0 as the highest priority and larger numbers as lower priorities (e.g., 5 is a higher priority than 10). The packaging algorithm also uses the priority in evaluating the package objectives. For the example, jobs (priority 1) are packaged before loans (priority 2) and grants (priority 3).

Fixed Amount Ded

A logical flag indicating whether the amount packaged for the objective is to directly reduce the amount to package before any additional objectives are processed.

Aid Package Criteria Table

The following lists the fields in the Aid Package Criteria table in the order in which you complete them. The table defines the parameters for packaging simulations so that the process does not overaward aid.

Aid Code

The Aid table code associated with the aid type for the objective.

Category

The aid funding category (e.g., NEW or RET). This value, which can be blank, allows a further breakdown within an academic program to store and use different fund allocations for various categories of students (e.g., returning, non-returning students).

Max Lifetime

The maximum a student can receive during his/her lifetime from a given financial aid. This value is used in the compliance restriction test to ensure that a student does not exceed the lifetime maximum amount.

Minimum-YR

The minimum amount that can be packaged. The packaging program will not package an amount that is less than the minimum amount.

Maximum-YR

The maximum amount that can be packaged. This is the upper limit restriction that the packaging program uses to make sure that students do not receive an amount over the maximum amount allowed.

Recommended

The recommended amount that students are to receive. This amount must be an amount between the minimum and maximum amounts. Recommended amounts must be given especially for the higher priority aids. The packaging program will attempt to assign awards using recommended amounts first before using another amount to meet the objective.

Increment

The rounding factor used to round award amounts. Awards will be rounded to the nearest increment amount when packaged.

Priority

The packaging selection order. Aid Package Criteria with higher priority values will be packaged first. The order of priority evaluation is that the larger the number the lower the priority (e.g., 4 is higher priority than 10).

Allocated

The amount available for distribution to students from a given financial award fund balance. If this amount is zero, the award fund balance will not be checked and there will be no restriction on the amount of aid that can be awarded from the fund.

Alloc Pct

The percentage of the Allocated amount available for awarding to students. If the Allocated amount is non-zero, this value must contain a non-zero percentage. The limit of available dollars for awarding students is determined by multiplying the allocated amount by the allocation percentage. Thus, an aid fund can be overawarded or underawarded to restricted funds for later awards.

Awarded

The sum of the student awards for the packaging method.

Note: This field is updated automatically by the packaging program, and displays current fund balances.

Canceled

This field is not used for packaging simulations.

Note: This field is updated automatically by the packaging program, and displays current fund balances.

Disbursed

This field is only used for actual financial awards and displays current fund balances.

Note: This field is updated automatically by the packaging program.

Setting Up the PC for EDE Processing

Introduction

Institutions are responsible for setting up the Personal Computer (PC) to be utilized in CX Electronic Data Exchange (EDE) process. For use in the EDE process, institutions can use a variety of terminal emulators to log in to the UNIX system and transfer files. However, Jenzabar recommends that the institution's terminal emulator use one of the following Jenzabar-supported serial file transfer protocols:

- Xmodem
- Zmodem
- Kermit

This section contains PC EDE setup and processing notes and GES (General Electronic Support) installation and testing notes.

PC Setup Note

When you install your PC file transfer program on the PC, set the PC to allow overwrite of files.

PC File Transfer Notes

After you login to the UNIX system as the *pcfin* user, the Jenzabar CX PC Transmit program (*pcxmit.scp*) prompts you to specify whether files are to be sent to the PC or received by the PC. When you specify the file transfer, the program then pauses until you initiate the transfer on the PC side. At this point, you must use the file transfer option of the PC terminal emulator to specify the location of the file on the PC.

The following lists the actions you must take to transfer files in the EDE process:

R (receive)

- Select the file transfer *send file* option.
- Specify the location of the file on the PC.

Result: The UNIX system receives the file from the PC.

S (send)

- Select the file transfer *receive file* option.
- Specify the location to place the file on the PC.

Result: The UNIX system sends the file to the PC.

Setting Up the PcfIn User for EDE Processing

Introduction

The Financial Aid product Electronic Data Exchange (EDE) process requires that you set up a PC user, named *pcfIn*, on the UNIX system because CX stores the EDE files in the *pcfIn* home directory. When setting up the UNIX system so that the PC is a user on the UNIX system, you must perform the following tasks:

- Create the *pcfIn* login on the UNIX system.
- Make the *pcfIn* login a C shell user.
- Modify the *pcfIn* .login and .logout files.

When you set up the *pcfIn* login, you can set the file transfer protocol that your institution intends to use to transfer files between CX and the PC. The CX Financial Aid EDE process can utilize a variety of protocols, including the following:

- Xmodem
- Zmodem
- Kermit

How to Create the PcfIn Login

To create the *pcfIn* login, you must execute the *addlogin* script. Using the *finaid* group as a model, make entries to create a login for *pcfIn*.

Note: For more information on creating user logins, refer to *CX Implementation and Maintenance Technical Manual Directory Permissions*

When setting up the *pcfIn* user, you must verify that the login has the following directory permissions:

```
drwxrwx--- pcfIn fin_aid
```

How to Set the Shell to C

The following table lists the steps to modify *pcfIn*'s password file so the user logs into the C shell rather than the CX menu system.

1. Access the /etc directory path and edit the password file by entering the following:

```
% cd /etc
```

```
% vi passwd
```
2. Make the *pcfIn* login a C shell user rather than a menu user by making the following edit:
Locate the following reference on the last line in the file, `:/usr/carsi/install/utl/menucsh`.
Replace the above reference with `:/bin/csh`.
3. Enter `:wq` to exit and save your changes to the `passwd` file.

How to Set Up the PcfIn .login and .logout Files

The following lists the steps to use the `pc-login` file as a template for the `.login` file for the *pcfIn* login.

Note: The `pc-login` file contains instructions to execute the `pcxmit.scp` script, which prompts the user to indicate if he or she intends to send files from the PC or to receive files from the UNIX system.

1. Access the `$CARSPATH/modules/finaid/documents/setup/ede` directory.

2. Copy the pc-login file to the pcfm directory path (e.g., **cp pc-login ~pcfm**).
3. Access the *pcfm* directory path and access the pc-login file in the vi editor by entering the following:
% cd ~pcfm
% vi pc-login
4. Do you want to change the default file transfer protocol, *zmodem*?
If yes, perform the following:
 - Locate the following line: \$CARSPATH/install/scp/finaid/pcxmit.scp zmodem
 - Replace the word *zmodem* with the file transfer protocol to be used (e.g., *xmodem*).If no, skip to step 6.
5. Enter **:wq** to exit and save your changes to the pc-login file.
6. Copy the pc-login file to the .login file to replace the existing *pcfm* .login file (e.g., **cp pc-login .login**).
7. Access the .logout file in the vi editor by entering the following:
% vi .logout
8. Comment out any lines in the .logout file.
9. Enter **:wq** to exit and save your changes to the .logout file.

Disabling EDE Processing

Introduction

The macros and includes that control the Electronic Data Exchange (EDE) process are enabled in the standard CX. If your institution does not want to keep EDE enabled, you must disable an include and a macro.

How to Disable the EDE Process

The following lists the steps to disable the EDE process.

1. Access the \$CARSPATH/include/custom directory.
2. Check out and access the faneed file by entering the following:
% make co F=faneed L=appropriate log message
% vi faneed
3. Locate the #define EDE line and move the line inside the comment line just above the #define EDE line.
 - Define line outside the comment lines:

Example:

```
/*-----  
    Define whether or not the user is participating in EDE. Will inhibit  
    prompting for exports if not participating  
-----*/  
#define EDE
```

- Define line inside the comment lines:

Example:

```
/*-----  
    Define whether or not the user is participating in EDE. Will inhibit  
    prompting for exports if not participating  
#define EDE  
-----*/
```

4. Enter **:wq** to exit and save the changes to the faneed file.
5. Check in the faneed file by entering the following:
% make cii F=faneed
6. Access the \$CARSPATH/macros/custom directory.
7. Check out and access the student file by entering the following:
% make co F=student L=appropriate log message
% vi student
8. Locate the #m4_define ENABLE_EDE line and change the value from **Y** to **N**.
9. Enter **:wq** to exit and save the changes to the student file.
10. Check in the student file by entering the following:
% make cii F=student
11. Reinstall the student file by entering the following:

```
% make reinstall F=student
```

12. Reinstall the source files by entering the following:

```
% cd $CARSPATH/src/finaid
```

```
% make REINSTALL
```

Setting Up a Work-Study (FW-S) Payroll

Introduction

When implementing the Financial Aid product, the institution must set up a Federal Work-Study (FW-S). In order for the Federal Work-Study to function properly, the institution must make the correct linkages between the Financial Aid and Payroll products.

In setting up this process, the institution must make settings in the following tables:

- Financial Aid table: Aid table (aid_table)
- Student Billing table: Subsidiary Total table (subt_table)
- Payroll tables:
 - Payroll table (pr_table)
 - Position Funding table (posfnd_table)
 - Position Record (pos_rec)
- Payroll records (for participating students)
 - Assignment Calculation record (assgncalc_rec)
 - Position record (pos_rec)
 - Personnel record (pers_rec)

The institution must also customize the FW-S reports.

Aid Table Setup

The Aid table (aid_table) in Financial Aid contains definitions for all the particular awards that a school can make. For each work program, you must add an entry in the Aid table. Most schools have the following kinds of student work programs:

- Federal College Work Study
- Institutional Work Program
- State Work Study Program

In the Aid table, set the Disburse to Stu. Accts flag to N for student work programs to avoid posting the entire amount of the award when other financial aid is posted. The following are other recommendations for the SDS Bill flags for work programs:

- Print on SDS Bill Y
- Priority 0
- Apply to SDS Bill N
- Print on FA Transcript N
- Transcript Print Order 0

Subsidiary Total Table Setup

The Subsidiary Total table (subt_table) contains the definitions of all the Subsidiary Total codes. Because each aid that can be posted must have a defined Subsidiary Total code, you must define a Subsidiary Total code for each FW-S program.

When you create the Subsidiary Total code for a FW-S program, consider the following:

- The Subsidiary Total code name must match the FW-S code in the Aid table.
- You must link the SB (Session Billing) balance code with the S/A (Student Accounts) subsidiary. The Subsidiary Balances Table (subb_table) links the balance codes with subsidiaries.
- You must link the FW-S Subsidiary Total code with the S/A subsidiary and the SB balance code. The Subsidiary Association Table (subas_table) links the Subsidiary Balance codes with the subsidiary total codes.

- Because the system uses account numbers from the Position record, you do not have to designate account numbers for a FW-S program in the Subsidiary Total table.
- Set the Post code to A even though work programs are posted through the Payroll program. Because, in the case of a noshow student, the Billing program will not attempt to reverse the work study totals when the Post field value is A.
- The Subsidiary Total table Subsidiary field must contain the value S/A (Student Accounts).

The following is an example of the S/L Balance/Total/Assoc tables screen, showing example entries for a FW-S program. You can access the screen in the Table Maintenance menu for Student Billing.

```

PERFORM: Query Next Previous View Add Update Remove Table Screen ...
Searches the active database table.          ** 1: subtable table**

          SUBSIDIARY BALANCE TABLE
Balance Code..... SB      Session Billing      Waive Int.....
Subsidiary..... S/A      Student Accounts      Priority..... 1
===== SUBSIDIARY TOTAL TABLE =====
Total Code.....[CWSP] [College Work-Study Prog ] Site.....[ ]
Subsidiary.....[S/A ] Student Accounts      Lost.....[N]
Program .....[ ] Post.....[A]
Association Code....[ ] CASHIER Post.....[Y]
Priority .....[2 ]
Fund.....[01] Current - Unrestricted
Function.....[ ] Blank Function
Object.....[0872]
Subfund.....[00 ] Homecoming
===== SUBSIDIARY ASSOCIATION TABLE =====
Subsidiary..... S/A      Student Accounts
Balance Code... SB      Session Billing
Total Code..... CWSP      College Work-Study Prog

```

Payroll Table Setup

The Payroll table (pr_table) defines the different kinds of payroll for an institution, links the payrolls to subsidiaries, and indicates the pay period. You can create one student payroll to handle all student employment programs, regardless of the funding source. You can also separate the student payrolls by funding source, such as: federal, state, institutional, and non-financial aid. You must link multiple student payrolls to the W/P subsidiary.

The following is an example of the Payroll Table screen, showing example entries for a student payroll.

Note: The Beginning Day is a numeric value from 0 - 6, corresponding to a day of the week, Sunday - Saturday.

```

PERFORM: Query Next Previous View Add Update Remove Table Screen ...
Searches the active database table.          ** 1: pr_table table**
                PAYROLL TABLE
Code.....[STU ]           Text.....[Student Payroll      ]
Number Last Issued...[3   ] Pay Period....[MO]   Beginning Day...[6 ]
Process Control.....[B]   Input Control..[B]   Sort Option....[2 ]
Subsidiary.....[W/P ]     Wages Payable
Default Hours.....[N]     Unemployment Status.....[N]
Check:Form Type.....[prcheck ]
      Document Code..[PR]   Payroll Checks
Direct Deposit:
      Allowed.....[N]       Form Type.....[      ]
      Document Code..[ ]     Blank doc station
W2 form.....[w2      ]

```

Position Funding Table Setup

The Position Funding table (posfndg_table) identifies the source of funding for a job. You must make an entry in this table for each FW-S program. You must also make a blank entry for those jobs that have no identified funding source. You enter a letter code used in the Assignment Calculation record, which associates a student to a job position, to identify when payroll charged against a department (cost center) should in all or part be refunded to that department from the federal or state college work study fund.

When you create the Position Funding code for a FW-S program, consider the following:

- For joint funding programs, such as Federal College Work Study positions, you must specify a Funding Account number along with a percentage to be funded for that program.
- For student work programs with no joint funding responsibility, you can leave the account information and the percentage blank.

Note: The institution might prefer to leave both the Funding Account number and the Percentage to be Funded blank for all FW-S programs. This setting instructs the system to charge 100% of the wages to the cost center, or department. This setting is important if the institution does not have a separate restricted current fund. FW-S is often maintained as a restricted current fund.

The following is an example of the Position Funding table screen, showing example entries for a FW-S.

```

PERFORM: Query Next Previous View Add Update Remove Table Screen ...
Searches the active database table.          ** 1: posfnd_table table**

                                POSITION FUNDING TABLE

Code....[C]                        Description.....[College Work Study      ]

                                Funding Account

Fund.....[25] CWSP
Function.....[****]
Object.....[****]
Subfund.....[****]

Percentage to be Funded.....[80.0      ]
Include Employer Paid Deductions in the Percentage Base...[N]

```

The following is an example of the Position Funding table screen, showing example entries for an Institutional work study.

```

PERFORM: Query Next Previous View Add Update Remove Table Screen ...
Searches the active database table.          ** 1: posfnd_table table**

                                POSITION FUNDING TABLE

Code....[I]                        Description.....[Institutional        ]

                                Funding Account

Fund.....[25] CWSP
Function.....[****]
Object.....[****]
Subfund.....[** ]

Percentage to be Funded.....[0.0      ]
Include Employer Paid Deductions in the Percentage Base...[N]

```

Required Payroll Records

You must create the following records for each student that participates in a FW-S program.

Position record

Every position within an institution must have a Position record (pos_rec), which defines information about the position. You access the Position record in the Employee Maintenance program Position screen. When you create the Position record for a FW-S program, consider the following:

- For student work study positions, leave the subsidiary information blank.
- The Account number is the number for the departmental student salary budget to which the wages will be expensed rather than the federal or state work study account number.

Personnel record

Each student in a FW-S program must have a Personnel record (pers_rec). You access the Personnel record in the Personnel Entry program Personnel screen.

Assignment Calculation record

Each student in a FW-S program must have an Assignment Calculation record (assgncalc_rec), which associates the student with a particular position. You create Assignment Calculation records using the Employment Maintenance program. When you create the Position record for a FW-S program, consider the following:

- The Funding Code field must contain the letter code defined for the funding source in the Position Funding table.

Note: For more information on using the above screens, see the *Personnel/Payroll User Guide*.

Customizing the FW-S Reports

The Financial Aid product has three reports for student work programs. The reports are located in the following directory path: \$CARSPATH/modules/payroll/reports. You can access the reports by selecting the College Work Study Program option in the Financial Aid Reports menu. This option accesses the Payroll/Personnel: College Work Study Program menu.

The following describes each FW-S report and the modifications you must make to the report.

Summary Of Student Payrolls Report (sumstupr)

Prints cumulative totals for the various student work program payrolls. The report is currently hard coded for FW-S and INST aid/tot codes; you must modify these codes to reflect actual work study codes.

Student Work Study Aid Report (wsneedrpt)

Prints Total Aid without Work Study and the Actual Amount Paid for Work Study. The report also shows the amount of financial need for a student, and can flag students whose earnings are approaching their maximum. This report selects students who have been paid, not those students who have just received aid. You do not need to modify this report.

Student Payrolls/Student Ledger Report (prstuldgr)

If the school has more than two types of funding in the Position Funding Table, you must modify this ACE report as follows:

1. Determine whether or not to display the transactions for the 80% refund on the report.
2. Change the account numbers into a statement to the account number(s) that are used for student salaries.

For example, the read into a statement on the report is as follows:

```
(gle_type = DIST or
gle_type = VDPR or
gle_type = FNDG or
gle_type = VFND)
```

Note: The current account numbers are as follows:

- DIST = Payroll Distribution
- VDPR = Void Payroll Check
- FNDG = Payroll Funding Entry
- VFND = Void Funding Entry

The report produces the following information:

110 Morgan Eugene, Thomas Robert				
			Paid	
		Amount	INST	CWSP
07/01/85	1003	Biology Dept	10.00	
	1003	Biology Dept	-8.00	
			0.00	10.00

If you make this change to a statement:
(gle_type = DIST or

gle_type = VDPR)

The report produces the following information:

110 Morgan Eugene, Thomas Robert				
			Paid	
	Amount	INST	CWSP	
07/01/85 1003 Biology Dept	10.00		0.00	10.00

Setting Up Document Tracking

Introduction

The following is the process for setting up document tracking, which involves setting up the following:

- Tables: Contact table, Tickler table, Fund Balance table
- Financial aid letters and reports (you must define what database information appears)
- SQL scripts, reports, include, and macro files

Note: See *Building the Contact/Tickler Tables* and *Building the Optional Tables* in this section for more information on setting up the Contact, Tickler, and Fund Balance tables.

Setup Information

The following lists the system features you must set for Document Tracking.

Macros/Includes

You must modify and install the following macros and include files:

- \$CARSPATH/macros/custom/ltrwp
- \$CARSPATH/macros/custom/student
- \$CARSPATH/include/custom/finaid

Tables

You must modify the following tables:

- Tickler Table - add FY## tickler code
- Contact Table - add contact codes annually for FY## tickler code, (e.g., ANFORM, ANCL, ANFSGN, FANULLFY, FADENY, FAREJECT)
- Fund Balance Table - add year and/or session contacts for particular aid codes

WPVI/financial aid/letters

You must modify and install the following letters for selection logic and content:

- ANCL/ANFCLS - covering letter and aid code related paragraphs
- FASTAT - FASTAT contact code with ltrfastat ACE
- FADENY - FADENY contact code with ltrterm ACE
- FAREJECT - FAREJECT contact code with ltrterm ACE
- FANULLFY - FANULLFY contact code with ltrterm ACE

Reports

You must modify and install the following reports located in \$CARSPATH/modules/finaid/reports:

- ACE Report letters: ltrfastat, ltrfastatctc, ltrfacover, ltrterm
- Document Tracking ACE reports: termaid, ctcrange, ctcstatus, pellverify, transreq, package

SQL scripts

You must modify and install the following SQL scripts located in \$CARSPATH/modules/finaid/informers: *dopkg*, *cmplpell*, *edfatflag*, *fatctc*, *statctc*, *loanctc*, *sarctc*, *typectc*, *voidctc*, *verctc*

Note: The *docrev* Csh script runs all of the above scripts. If you are not using one of the above scripts, you must comment out that script in the *docrev* file.

Setting Up Check Refunding

Introduction

To set up Financial Aid Check Refunding, you must make entries to the following tables:

- Contact table (ctc_table)
- Deferment table (defer_table)

These pages describe these entries and the tables used by the Check Refunding process.

Tables You Must Update

The following lists and describes the tables in which you must update in setting up the Financial Aid Check Refunding process.

Contact table (ctc_table)

You must enter a series of entries that contain a prefix, FACHK, for financial aid check refunds and the number of the associated Group Award Period (GAP), (e.g., 001). The contact resource represents the GAP for all ordered refunds.

Example:

The contact resource for GAP 001 is *FACHK001*.

- Jenzabar recommends that the institution use a specific set of numbers for each financial aid year (e.g., SBVC 0 through 99 and CHC 100 through 199).
- The process uses the Contact table when you process by groups defined/identified by a particular contact rather than by ID number.
- When entering the above contacts, you must use the Tickler code RFND. (See Tickler table below for more information.)

Deferment table (defer_table)

Contains two important fields used by the check refunding process that you must update as follows:

Refund Code

You must add a code for each financial aid program (e.g., RPEL for Pell refunds) that refunds any excess amount to a student.

Refund Excess to Student

You must enter **Y** (yes) in the field.

Tickler table (tick_table)

You must enter the following tickler code, which is specifically for the check refund process: **RFND**

Note: This entry is required for the check refund process to function and must be made before the Contact table entries can be made.

Before Running the Process

- Jenzabar suggests that the Financial Aid office run a contact report listing every student who has the FACHKXX contact resource with an expected (E) status. The Financial Aid office will then have a list of the students eligible for financial aid refunds.
- The Business office must be notified to run the Financial Aid Posting process before the Financial Aid office runs the Financial Aid Check Refunding process. Access the Refundable Aid: Reports menu and select the Enrollment Variance-Fund option. This option generates a variance report of up to three aid codes in the Enrollment Variance-Fund report.

Setting Up Award Notice Forms

Adding a New Form

Your institution can create another award notice format, a new form can be created based on one of the CX supplied forms in \$CARSPATH/modules/finaid/forms/faentry/anform. The Financial Aid Entry program will look in the install path for financial aid forms (^FPSPATH'/finaid/faentry) to get the valid forms available. The default form is *anform*. Your institution can have as many forms as desired but the name must be limited to six characters.

Any attribute not to be used on the form should be marked as optional in the attribute section to avoid binding errors by Financial Aid Entry. Also, the instructions portion of the new form should have the formtype value set to the name of the new form.

Database Records

Information from certain database records can be printed on the award notice. You can use any field from the following database records:

- aid_rec
- fa_item_table
- fabgt_table
- fabgtas_table
- faneed_rec
- id_rec
- prog_enr_rec
- stufa_rec

Naming Conventions

Consider the following when creating a new award notice form:

- Use a filename in modules/finaid/forms/faentry that is in lower case and does not exceed six (6) characters (e.g., anform). Jenzabar recommends retaining the name anform for simplicity and fewer changes in other areas, such as the entry parameter screen and macros. If you use more than one form, the filenames must be unique.
- In the faentry parameter screen, the form name appears in upper case (e.g., ANFORM). If you have more than one award notice, or you want the default to be other than ANFORM, the default and include attributes must contain the valid names (modules/finaid/progscr/faentry/parms).
- Even though you can use more than two award forms, Document Tracking can only track two forms, which must be defined in include/custom/finaid, define ANFORM1 and ANFORM2.
- You can set the formtype at the end of the award notice form file to the same name as the file, in lowercase. The system uses the formtype when the forms are printed using the Utility menu (fps). Do *not* modify a form after producing an fps file unless the only modification is to change the position of fields. If you remove fields, bind errors and field not found errors will result. If you remove or add fields, remove the fps file and recreate the forms.

Contact Table Entries

The Schedule output function requires a scheduling code. The following shows an example scheduling code entry to the Contact table.

```

CONTACT TABLE (1)

Code.....[ANFORM ]
Description..[ANFORM Scheduling Ctc ]
Tickler.....[FY97]
Comm Code...[LETT]
Routing.....[O]
Ace Report...[ ]
Run Code.....[ ]

```

You can use one contact code, such as ANFSGN, for all types of signed award notices. The following shows an example signed award notice code entry to the Contact table.

```

CONTACT TABLE (2)

Code.....[ANFSGN01]
Description..[FA Awrd Lett Recvd-Init ]
Tickler.....[FY97]
Comm Code...[LETT]
Routing.....[I]
Ace Report...[ ]
Run Code.....[ ]

```

To use the Output function in faentry, you must define each revision number with the award letter name in the Contact Table for each award notice form. If you use multiple award notice forms, you must also enter a different set of contacts to track each form as it is sent out. The following shows an example Output function award notice code entry to the Contact table.

```

CONTACT TABLE (3)

Code.....[ANFORM01]
Description..[Initial Award Letter ]
Tickler.....[FY97]
Comm Code...[LETT]
Routing.....[O]
Ace Report...[ ]
Run Code.....[ ]

```

Modification Process

The following lists the steps to modify an award notice form.

1. Select an award form file that is closest to the desired format and copy the file to \$CARSPATH/modules/finaid/forms/faentry.
2. Access the forms directory for faentry, create a new file using *make*, and access the file.


```

% cd modules/finaid/forms/faentry
% make add F=<file/form name>
% vi <newfile>

```
3. Place the cursor on the line under the brace, }, after the word form, and enter **dG** to delete the file from the point where the cursor is placed to the end of the file. Then, with the cursor in the same place as above, enter:


```

% :r <desired format file> [This reads in the file.]

```
4. Delete the top part of the file that was read in (down to the line under the curly brace, }). This will leave you with the first part of the file resulting from the 'make add' step and the second part of the file which is most of the read-in file.
5. Make any necessary modifications to the file.
6. Change the formtype if desired, then enter: **:wq** (or **:zz**)
7. Install the new file.


```

% make tinstall F=<newfile>

```

8. Test by using the Output command in faentry on a test student to verify that amounts are printing correctly and that the field is large enough.
9. Check in the new form file.
 % **make cii F=<newfile> L="log message for modifications"**

Sample Form File

The following is the file anform from modules/finaid/forms/faentry with descriptions and suggestions/notes interspersed to aid in modification.

```

=====
#####NOTE: The revision header information has been removed to save space.
{
Financial Aid Award Test Letter used by the Financial Aid Entry program.
}
-----
}

#####NOTE: You have 66 lines to work with starting with the line
following the bracket, {, to the bracket, }, before 'end'.

form
{
                                [revtext          ]
                                ID#[id          ]   SS#[ssno          ]
                                [stuname         ]
                                CARS College
                                Financial Aid Award Letter
                                for[fayr ]Academic Year
                                [date1          ]
                                [line0 #####NOTE: You may
                                [line1 use less than four
                                [line2 lines of address.
                                [line3
                                [line4          ]
RETURN BY: [rdate1          ]

#####NOTE: The following budget section may be changed or deleted.
If the budget items are to be printed here, the flag in
the fa_item_table (Budget/Item Expense Association Table)
'Print on Award Notice' field must be set to 'Y'.

Estimated Budget:
[satt1 ] [sbttl ] [scttl ] [sdttl ] Total
[bgdesc0 ] [bga0 ] [bgb0 ] [bgc0 ] [bgd0 ] [bgsum0 ]
[bgdesc1 ] [bga1 ] [bgb1 ] [bgc1 ] [bgd1 ] [bgsum1 ]
[bgdesc2 ] [bga2 ] [bgb2 ] [bgc2 ] [bgd2 ] [bgsum2 ]
[bgdesc3 ] [bga3 ] [bgb3 ] [bgc3 ] [bgd3 ] [bgsum3 ]
[bgdesc4 ] [bga4 ] [bgb4 ] [bgc4 ] [bgd4 ] [bgsum4 ]
[bgdesc5 ] [bga5 ] [bgb5 ] [bgc5 ] [bgd5 ] [bgsum5 ]
                                [dsh1a ] [dsh1b ] [dsh1c ] [dsh1d ] -----
Total Estimated Expense.....[bgatot ] [bgbtot ] [bgctot ] [bgdtot ] [totbg ]

#####NOTE: If all four categories are not to be used, start at
the top with category A. Additional lines can be added if more
than four lines of aid are to be printed within a category; be
sure to also add the appropriate scroll groups. If a student
has one or more aids exceeding the number of available lines
within a category, a second page will print the remainder of
the extra lines for that category with the totals (the rest of
the form will print correctly on the first page, assuming no
other errors).

College Disbursed Financial Aid:
[caa^caA^adesc0 ^A^aa0 ][ab0 ][ac0 ][ad0 ][asum0 ]
[cab^caB^adesc1 ^B^aa1 ][ab1 ][ac1 ][ad1 ][asum1 ]
[cac^caC^adesc2 ^C^aa2 ][ab2 ][ac2 ][ad2 ][asum2 ]
[cad^caD^adesc3 ^D^aa3 ][ab3 ][ac3 ][ad3 ][asum3 ]
[cae^caE^adesc4 ^E^aa4 ][ab4 ][ac4 ][ad4 ][asum4 ]
                                [dsh2a ] [dsh2b ] [dsh2c ] [dsh2d ] -----
                                [aatot ] [abtot ] [actot ] [adtot ] [tota ]

Student Earned Scholarships/Awards:
[cba^cbA^bdesc0 ^a^ba0 ][bb0 ][bc0 ][bd0 ][bsum0 ]
[ccb^cbB^bdesc1 ^b^ba1 ][bb1 ][bc1 ][bd1 ][bsum1 ]
[cbc^cbC^bdesc2 ^c^ba2 ][bb2 ][bc2 ][bd2 ][bsum2 ]
[cbd^cbD^bdesc3 ^d^ba3 ][bb3 ][bc3 ][bd3 ][bsum3 ]
                                [dsh3a ] [dsh3b ] [dsh3c ] [dsh3d ] -----
                                [batot ] [bbtot ] [betot ] [bdtot ] [totb ]

Outside Scholarships/Awards (Non-disbursed by college):
[cca^ccA^cdesc0 ^0^ca0 ][cb0 ][cc0 ][cd0 ][csum0 ]
[ccb^ccB^cdesc1 ^1^ca1 ][cb1 ][cc1 ][cd1 ][csum1 ]
[ccc^ccC^cdesc2 ^2^ca2 ][cb2 ][cc2 ][cd2 ][csum2 ]
[ccd^ccD^cdesc3 ^3^ca3 ][cb3 ][cc3 ][cd3 ][csum3 ]
                                [dsh4a ] [dsh4b ] [dsh4c ] [dsh4d ] -----
                                [catot ] [cbtot ] [cctot ] [cdtot ] [totc ]

Non-institutional Loans:
[cda^cdA^ddesc0 ^7^da0 ][db0 ][dc0 ][dd0 ][dsum0 ]
[cdb^cdB^ddesc1 ^8^da1 ][db1 ][dc1 ][dd1 ][dsum1 ]
[cdc^cdC^ddesc2 ^9^da2 ][db2 ][dc2 ][dd2 ][dsum2 ]
                                [dsh5a ] [dsh5b ] [dsh5c ] [dsh5d ] -----
                                [datot ] [dbtot ] [dctot ] [ddtot ] [totd ]

Total Aid Offered.....[abcdta ] [abcdtb ] [abcdtc ] [abcdtd ] [totabcd]
Net Estimated Direct Cost/Session..[abcdna ] [abcdnb ] [abcdnc ] [abcdnd ] [abcdnet]

I ACCEPT the financial awards indicated above. I have read, understood,
and agree to the conditions of the award(s) as outlined on the enclosed

```

```

statement.

-----
signature of student                                date
>> Must be signed and returned by[rdate2 ]<<
>>         or awards may be canceled             <<

}
end

#####NOTE: Do not duplicate fields in the attribute section or else
it will core dump. You can use aliases.

attributes

id = id_no;
revtext: optional; (NOTE: revision text, ie Initial Award/Revised Award 02)
ssno = ss_no, optional;
stuname: optional; (NOTE: student's label style name from ADR, 99 char. max)
stusalut: optional; (NOTE: student's salutation style name from ADR, 50 ch. max)
line0: optional; (NOTE: line0 through line6 are the address lines from
line1: optional; ADR, 50 characters max)
line2: optional;
line3: optional;
line4: optional;
line5: optional;
line6: optional;
fayr: optional; (NOTE: finaaid year, ie 97/98, can't be shown as 1997-98)
date1: optional; (NOTE: date award notice is issued)
rdate1: optional; (NOTE: date1 and rdate2 are "Return by ____" set by the
rdate2: optional; value entered in the faentry param screen)
pinc: optional; (NOTE: primary method total income for parents)
sinc: optional; (NOTE: primary method total income for student)
sattl: optional; (NOTE: attl through sdttl are the session column
sbttl: optional; headings, ie FA97, SP98)
scttl: optional;
sdttl: optional;
aamtsta: optional; (NOTE: 1 st session's aid amount status value, Category A)
aamtstb: optional; (NOTE: 2nd session's aid amount status value, Category A)
aamtstc: optional; (NOTE: 3rd session's aid amount status value, Category A)
aamtstd: optional; (NOTE: 4th session's aid amount status value, Category A)
bamtsta: optional; (NOTE: bamtsta through bamtstd are the same as above
bamtstb: optional; except they are for Category B)
bamtstc: optional;
bamtstd: optional;
camtsta: optional; (NOTE: camtsta through camtstd are the same as above
camtstb: optional; except they are for Category C)
camtstc: optional;
camtstd: optional;
damtsta: optional; (NOTE: damtsta through damtstd are the same as above
damtstb: optional; except they are for Category D)
damtstc: optional;
damtstd: optional;
aaidsta: optional; (NOTE: 1st session aid status value for Category A)
aaidstb: optional; (NOTE: 2nd session aid status value for Category A)
aaidstc: optional; (NOTE: 3rd session aid status value for Category A)
aaidstd: optional; (NOTE: 4th session aid status value for Category A)
baidsta: optional; (NOTE: baidsta through baidstd are the same as above
baidstb: optional; except they are for Category B)
baidstc: optional;
baidstd: optional;
caidsta: optional; (NOTE: caidsta through caidstd are the same as above
caidstb: optional; except they are for Category C)
caidstc: optional;
caidstd: optional;
daidsta: optional; (NOTE: daidsta through daidstd are the same as above
daidstb: optional; except they are for Category D)
daidstc: optional;
daidstd: optional;
need: optional; (NOTE: from faneed_rec [totbg - fan_tfc]
(total budget less total family contribution)
pc0: optional; (NOTE: pc0 through pc4 are for Prev award codes that were
pc1: optional; originally added for KZ00)
pc2: optional;
pc3: optional;
pc4: optional;
cc0: optional; (NOTE: ccc0 through cc4 are for Current award codes that
cc1: optional; were originally added for KZ00)
cc2: optional;
cc3: optional;
cc4: optional;

```

```

totpa: optional;      (NOTE: total of Prev awards)
totca: optional;      (NOTE: total of Current awards)
ca0: optional;        (NOTE: ca0 through ca4 are for Current award amounts)
ca1: optional;
ca2: optional;
ca3: optional;
ca4: optional;
pa0: optional;        (NOTE: pa0 through pa4 are for Prev award amounts)
pa1: optional;
pa2: optional;
pa3: optional;
pa4: optional;
k1: optional;        (NOTE: done for K200)
k2: optional;
k3: optional;
k4: optional;

#####NOTE: bgdesc is budget item desc. the budget item table

bgdesc = tfaitem_text,
        scroll = (bgdesc0, bgdesc1, bgdesc2, bgdesc3, bgdesc4, bgdesc5), optional;

#####NOTE: bga through bgd are the 1st-4th session budget dollar amounts.

bga: scroll = (bga0, bga1, bga2, bga3, bga4, bga5), format="###&.&&",
        optional;
bgb: scroll = (bgb0, bgb1, bgb2, bgb3, bgb4, bgb5), format="###&.&&",
        optional;
bgc: scroll = (bgc0, bgc1, bgc2, bgc3, bgc4, bgc5), format="###&.&&",
        optional;
bgd: scroll = (bgd0, bgd1, bgd2, bgd3, bgd4, bgd5), format="###&.&&",
        optional;

#####NOTE: bgsum is the sum of the budget amounts across all sessions
        for each item

bgsum: scroll = (bgsum0, bgsum1, bgsum2, bgsum3, bgsum4, bgsum5),
        format="###&.&&", optional;

#####NOTE: bgatot through bgdtot are the 1st through the 4th sessions'
        budget totals; totbg is the total expense budget

bgatot: void, default="      ", format="###&.&&", optional;
bgbtot: void, default="      ", format="###&.&&", optional;
bgctot: void, default="      ", format="###&.&&", optional;
bgdtot: void, default="      ", format="###&.&&", optional;
totbg: void, default="      ", format="###&.&&", optional;

#####NOTE: adescA is the 24 char. desc. from the aid table
#####NOTE: adescA and adescB are mutually exclusive, both
        cannot be used at the same time

adescA: scroll = (adesc0, adesc1, adesc2, adesc3, adesc4), optional;

#####NOTE: adescB is the 40 char. desc. from the aid table

adescB: optional;

#####NOTE: abox1 and abox2 are the accept/reject check boxes.
        Values can be changed in include/custom/finaid.

abox1: scroll = (caa, cab, cac, cad, cae), optional;
abox2: scroll = (caA, caB, caC, caD, caE), optional;
#####NOTE: asmb1 is the notation symbol, if specified in
        the aid table

asmb1: scroll = (A,B,C,D,E), optional;

#####NOTE: aa through ad are the 1st - 4th sessions' aid dollar amt.
        asum is the total aid offered in this section.

aa: scroll = (aa0, aa1, aa2, aa3, aa4), format="###&.&&", optional;
ab: scroll = (ab0, ab1, ab2, ab3, ab4), format="###&.&&", optional;
ac: scroll = (ac0, ac1, ac2, ac3, ac4), format="###&.&&", optional;
ad: scroll = (ad0, ad1, ad2, ad3, ad4), format="###&.&&", optional;
asum: scroll = (asum0, asum1, asum2, asum3, asum4), format="###&.&&",
        optional;

#####NOTE: aatot through adtot are the 1st - 4th sessions' aid
        totals. tota is the total aid offered in section A.

aatot: void, default="      ", format="###&.&&", optional;
abtot: void, default="      ", format="###&.&&", optional;
actot: void, default="      ", format="###&.&&", optional;
adtot: void, default="      ", format="###&.&&", optional;

```



```

tota: void, default="          ", format="###&.&&", optional;
#####NOTE: bdesca through totb are the same as above but are
           for section B.

bdesca: scroll = (bdesc0, bdesc1, bdesc2, bdesc3), optional;
bdescb: optional;
bbox1: scroll = (cba, cbb, cbc, cbd), optional;
bbox2: scroll = (cbA, cbB, cbC, cbD), optional;
bsmbl: scroll = (a,b,c,d), optional;
ba: scroll = (ba0, ba1, ba2, ba3), format="###&.&&", optional;
bb: scroll = (bb0, bb1, bb2, bb3), format="###&.&&", optional;
bc: scroll = (bc0, bc1, bc2, bc3), format="###&.&&", optional;
bd: scroll = (bd0, bd1, bd2, bd3), format="###&.&&", optional;
bsum: scroll = (bsum0, bsum1, bsum2, bsum3), format="###&.&&",
optional;
batot: void, default="          ", format="###&.&&", optional;
bbtot: void, default="          ", format="###&.&&", optional;
bctot: void, default="          ", format="###&.&&", optional;
bdtot: void, default="          ", format="###&.&&", optional;
totb: void, default="          ", format="###&.&&", optional;

#####NOTE: cdesca through totc are the same as above but are
           for section C.

cdesca: scroll = (cdesc0, cdesc1, cdesc2, cdesc3), optional;
cdescb: optional;
cbox1: scroll = (cca, ccb, ccc, ccd), optional;
cbox2: scroll = (ccA, ccB, ccC, ccD), optional;
csmbl: scroll = (0,1,2,3), optional;
ca: scroll = (ca0, ca1, ca2, ca3), format="###&.&&", optional;
cb: scroll = (cb0, cb1, cb2, cb3), format="###&.&&", optional;
cc: scroll = (cc0, cc1, cc2, cc3), format="###&.&&", optional;
cd: scroll = (cd0, cd1, cd2, cd3), format="###&.&&", optional;
csum: scroll = (csum0, csum1, csum2, csum3), format="###&.&&",
optional;
catot: void, default="          ", format="###&.&&", optional;
cbtot: void, default="          ", format="###&.&&", optional;
cctot: void, default="          ", format="###&.&&", optional;
cdtot: void, default="          ", format="###&.&&", optional;
totc: void, default="          ", format="###&.&&", optional;
#####NOTE: ddesca through totd are the same as above but are for section D.

ddesca: scroll = (ddesc0, ddesc1, ddesc2), optional;
ddescb: scroll = (ddesc0, ddesc1, ddesc2), optional;
dbox1: scroll = (cda, cdb, cdc, cdd), optional;
dbox2: scroll = (cdA, cdB, cdC, cdD), optional;
dsmbl: scroll = (7,8,9), optional;
da: scroll = (da0, da1, da2), format="###&.&&", optional;
db: scroll = (db0, db1, db2), format="###&.&&", optional;
dc: scroll = (dc0, dc1, dc2), format="###&.&&", optional;
dd: scroll = (dd0, dd1, dd2), format="###&.&&", optional;
dsum: scroll = (dsum0, dsum1, dsum2), format="###&.&&",
optional;
datot: void, default="          ", format="###&.&&", optional;
dbtot: void, default="          ", format="###&.&&", optional;
dctot: void, default="          ", format="###&.&&", optional;
ddtot: void, default="          ", format="###&.&&", optional;
totd: void, default="          ", format="###&.&&", optional;

#####NOTE: gsltext is a text line that will print if a student
           has a "gsl" award and if the fan_gsl_recom or fan_gsl_max
           are non-zero in the faneed_rec

gsltext: optional;

#####NOTE: totab through totabcd are cumulative aid totals across all
           sessions: totab = tota + totb; totabc = totab + totc
           totabcd = totabc + totd

totab: void, default="          ", format="###&.&&", optional;
totabc: void, default="          ", format="###&.&&", optional;
totabcd: void, default="          ", format="###&.&&", optional;

#####NOTE: anet through abcdnet are accumulated net costs across
           all sessions: anet = totbg - tota; abnet = totbg - totab;
           abcnet = totbg - totabc; abcdnet = totbg - totabcd
#####NOTE: line abctet is an error that is going to be removed
           as it is not a valid attribute

anet: void, default="          ", format="----&.&&", optional;
abnet: void, default="          ", format="----&.&&", optional;
abctet: void, default="          ", format="----&.&&", optional;
abcdnet: void, default="          ", format="----&.&&", optional;
abcdnet: void, default="          ", format="----&.&&", optional;

```

#####NOTE: ana through abcdnd are accumulated net cost per session.
 'ana' to 'and' are 1st-4th session budget expense less category
 A amounts; abna to abnd are 1st-4th session budget expense less
 categories A and B amounts; abcna to abcdnd are 1st-4th session
 budget expense less categories A, B, and C amounts; abcdna to
 abcdnd are 1st-4th session budget expense less categories A, B,
 C, and D amounts.

```
ana: void, default="      ", format="###&.&&", optional;
anb: void, default="      ", format="###&.&&", optional;
anc: void, default="      ", format="###&.&&", optional;
and: void, default="      ", format="###&.&&", optional;
abna: void, default="      ", format="###&.&&", optional;
abnb: void, default="      ", format="###&.&&", optional;
abnc: void, default="      ", format="###&.&&", optional;
abnd: void, default="      ", format="###&.&&", optional;
abcna: void, default="      ", format="###&.&&", optional;
abcnb: void, default="      ", format="###&.&&", optional;
abcnc: void, default="      ", format="###&.&&", optional;
abcdnd: void, default="      ", format="###&.&&", optional;
abcdna: void, default="      ", format="###&.&&", optional;
abcdnb: void, default="      ", format="###&.&&", optional;
abcdnc: void, default="      ", format="###&.&&", optional;
abcdnd: void, default="      ", format="###&.&&", optional;
```

#####NOTE: abta through abcdtd are cumulative aid session totals.
 abta to abtd are 1st-4th session summaries of categories A and
 B; abcta to abctd are 1st-4th session summaries of categories
 A, B, and C; abcdta to abcdtd are 1st-4th session summaries of
 categories A, B, C, and D.

```
abta: void, default="      ", format="###&.&&", optional;
abtb: void, default="      ", format="###&.&&", optional;
abtc: void, default="      ", format="###&.&&", optional;
abtd: void, default="      ", format="###&.&&", optional;
abcta: void, default="      ", format="###&.&&", optional;
abctb: void, default="      ", format="###&.&&", optional;
abctc: void, default="      ", format="###&.&&", optional;
abcdtd: void, default="      ", format="###&.&&", optional;
abcdta: void, default="      ", format="###&.&&", optional;
abcdtb: void, default="      ", format="###&.&&", optional;
abcdtc: void, default="      ", format="###&.&&", optional;
abcdtd: void, default="      ", format="###&.&&", optional;
```

#####NOTE: dsh1a through dsh5d are for dash lines. dsh1a to dsh1d
 are for the 1st-4th sessions of the budget section; dsh2a to
 dsh2d are for the 1st-4th sessions of category A; dsh3a to dsh3d
 are for the 1st-4th sessions of category B; dsh4a to dsh4d are
 for the 1st-4th sessions of category C; dsh5a to dsh5d are for
 the 1st-4th sessions of category D.

```
dsh1a: optional;
dsh1b: optional;
dsh1c: optional;
dsh1d: optional;
dsh2a: optional;
dsh2b: optional;
dsh2c: optional;
dsh2d: optional;
dsh3a: optional;
dsh3b: optional;
dsh3c: optional;
dsh3d: optional;
dsh4a: optional;
dsh4b: optional;
dsh4c: optional;
dsh4d: optional;
dsh5a: optional;
dsh5b: optional;
dsh5c: optional;
dsh5d: optional;
```

#####NOTE: if the accept/reject boxes, ie abox1/abox2, and/or the
 symbol field, ie asmb1, are moved on the form then you need to
 move them into the correct order within the following groups.
 The order of the fields must be left to right in the scroll
 groups.

```
bgt: group = (bgdesc, bga, bgb, bgc, bgd, bgsum);
agroup: group = (abox1,abox2,adesca,asmb1,aa,ab,ac,ad,asum);
bgroup: group = (bbox1,bbox2,bdesca,bsmb1,ba,bb,bc,bd,bsum);
cgroup: group = (cbox1,cbox2,cdesca,csmb1,ca,cb,cc,cd,csum);
dgroup: group = (dbox1,dbox2,ddesca,dsmb1,da,db,dc,dd,dsum);
```

```
end
instructions
#####NOTE: Changing the formtype to the same as the award notice
|| filename but in lower case letters is standard practice
|| to assist in printing the specific award notice form. The
|| formtype is used by the printing functionality.
formtype = revanf;
alignment;
end
```

Setting Up Financial Aid Loan

Introduction

The following is the process for setting up Financial Aid Loan:

- Loan Configuration macros
- Loan Origination Table (loanorig_table)

Setting Up Financial Aid Loan Configuration Macros

To set up Financial Aid Loan Processing, you must check the standard entries in the Configuration Table (config_table) and modify if necessary.

Accessing the Configuration Table

Access the Configuration macros for Financial Aid Loan are located in the Configuration table. Access the Configuration table by selecting the following beginning at the Master menu:

1. System Management
2. Table Maintenance
3. Modules (A-L)
4. Common (A-C)
5. Configuration

Modifying the Financial Aid Loan Macros

To support the edit check feature in Financial Aid Loan, you must modify the following Financial Aid Loan Configuration macros as they apply to your institution.

ENABLE_FAENTRY_LOAN_ACCESS

Enables access to the Financial Aid Loan screens from within the Financial Aid Entry program. If access to the Financial Aid Entry screen is display only, then access to the Financial Aid Loan screens is also display only.

LOAN_BATCH_FILE_DIR

Defines the directory for creating Loan Export files and locating Loan Import files.

LOAN_DEFAULT_LOANGUAR

Defines the default Guarantor code (e.g., 800) used by your institution.

LOAN_DEFAULT_LOANORIG

Defines the default Origination Agency (DIRECT or COMMON) used by your institution.

LOAN_DEFAULT_NEED_METHOD

Defines the default Need Method code (e.g., FM) used by your institution.

LOAN_DEFAULT_PLUS_CODE

Used for Plus loans. This macro defines the default Parent Loans code (e.g., PLUS) used by your institution.

LOAN_DEFAULT_REQ_TYPE

Used for CommonLine loans. This macro defines the default Request Type code (e.g., CR) used by your institution.

LOAN_DEFAULT_STAF_CODE

Used for Stafford loans. This macro defines the default Stafford code (e.g., STAF) used by your institution.

LOAN_DEFAULT_UNSB_CODE

Used for Unsubsidized Stafford loans. This macro defines the default Unsubsidized Stafford code (e.g., UNSB) used by your institution.

LOAN_EFT_ADD_COMPLIANCE_CTC

This macro defines whether the Post Loans to Student Account process adds a Contact record (ctc_rec) if the edit checks pass. The ctc_rec.resrc is set to be the aid_rec.aid + aid_rec.sess + aid_rec.yr [3, 4]. For example, PLUSFA99. The ctc_rec.tick is set to "FY" + aid_rec.fa_yr [1, 2]. For example, FY99.

LOAN_EFT_ATTENDANCE_COST_TEST

This macro defines whether the Post Loans to Student Account process performs the Attendance Cost test.

LOAN_EFT_COURSE_NOCOUNT_LIST

For the Credit test, this macro identifies a list of courses that are not counted in the total hours registered. If a student is found to be enrolled in any of the comma-separated list of courses specified in this macro, the course load for those courses is excluded from the total registered hours.

LOAN_EFT_COURSE_PASS_LIST

For the Credit test, this macro identifies a list of courses that pass the test automatically. If a student is found to be enrolled in any of the comma-separated list of courses specified in this macro, they automatically pass the Credit test.

LOAN_EFT_CREDIT_TEST

When set to Y, the Post Loans to Student Account process performs the Credit test.

LOAN_EFT_ENTRANCE_INTERVIEW_CTC

Lists the Resource codes used to define the entrance interview contact(s).

LOAN_EFT_ENTRANCE_INTERVIEW_TEST

When set to Y, This macro causes the Post Loans to Student Account process to perform the Attendance Cost test.

LOAN_EFT_OVERAWARD_TEST

When set to Y, This macro causes the Post Loans to Student Account process to perform the Over-award test.

LOAN_EFT_OVERDISB_TEST

When set to Y, This macro causes the Post Loans to Student Account process to perform the Over-disbursed test.

LOAN_LENDER_ID_REQUIRED

When set to Y, this macro requires you to enter a CX ID number in the ID field when adding or updating the Lender Table Entry screen. When set to N, this macro allows you to leave a zero (0) in the ID field on the Lender Table Entry screen. In either case, the lender name appears as entered in the lookup of lenders from the loan tracking entry process, allowing the loan side to have a different name than the CX ID record. Or, in the case of no CX ID record, it allows a name to be stored by which the user can select a lender.

LOAN_MPN_DELIVERY_METHOD

This macro defines the default value for the Master Promissory Note (MPN) Delivery method (loan_rec.mpn_deliv field). This value is a one-character code indicating the preferred method of delivering the Master Promissory Note to the borrower. Valid codes are:

- Blank
- E (E-mail)
- P (Paper)

- W (Web)

The standard default of this macro is blank and should be changed only if your institution is currently set up to use MPN Loans. Once your institution is set up as an MPN school you must process all Stafford loans as MPN loans (e.g., you cannot process some Stafford loans as MPN loans and others as non-MPN loans). Jenzabar strongly recommends that your institution leave this default blank until you are set up as an MPN school. In addition to defining the LOAN_MPN_DELIVERY_METHOD macro, to complete MPN setup be sure to define the LOAN_MPN_SERIAL_LOAN_CODE macro and to define the Application Code value as M in your Loan Type table entries.

LOAN_MPN_SERIAL_LOAN_CODE

This macro defines the default value for the Master Promissory Note (MPN) Serial Loan code (loan_rec.mpn field). This value is a one-character code indicating how your institution intends to use the Master Promissory Note. Valid codes are:

- Blank
- N (New; use a new Master Promissory Note)
- S (Serial; renew the existing Master Promissory Note)

The standard default of this macro is blank and should be changed only if your institution is currently set up to use MPN Loans. Once your institution is set up as an MPN school you must process all Stafford loans as MPN loans (e.g., you cannot process some Stafford loans as MPN loans and others as non-MPN loans). Jenzabar strongly recommends that your institution leave this default blank until you are set up as an MPN school. You may wish to set this macro to the most common value used by your institution or you may wish to leave it blank and allow the user to select the appropriate value for the selected MPN loan. Once you are ready to certify a selected MPN loan, you are required to enter a value in the loan_rec.mpn field. In addition to defining the LOAN_MPN_SERIAL_LOAN_CODE macro, to complete MPN setup be sure to define the LOAN_MPN_DELIVERY_METHOD macro and to define the Application Code value as M in your Loan Type table entries.

LOAN_OTHR_TOT_CODES

Identifies tot codes for alternative loans (not fully implemented).

LOAN_PLUS_TOT_CODES

Identifies the list of Tot codes for parent loans.

LOAN_RECIPIENT_BRANCH_ID

Unique (4-digit max) ID number receiving files, assigned by entity other than Department of Education.

LOAN_RECIPIENT_ED_BRANCH_ID

The 2-digit ID number assigned by the Department of Education to the branch office receiving the files.

LOAN_RECIPIENT_ID

Unique (6-digit max) ID number assigned to the organization receiving files. For guarantors, this is a 3-digit number as shown in Appendix A of CommonLine documentation. For all other organizations, this is a 6-character number assigned by the Department of Education.

LOAN_RECIPIENT_NAME

Name (32-char max) of recipient of loan origination files.

LOAN_SAME_FILE_EXTENSION

Determines how outbound file names are constructed. If "N" (default), outbound files will have an extension of .001, .002, .003, etc. for the second and subsequent filenames, respectively. If "Y", all files will have the same extension (as determined from the loanfmt_table), and the filename will include 001, 002, 003, etc. for the second and subsequent filenames (not the extension)

LOAN_SCHOOL_BRANCH_ID

Unique (4-digit max) ID number assigned by entity other than Department of Education.

LOAN_SCHOOL_ED_BRANCH_ID

School's 2-digit branch ID assigned by the department of Education.

LOAN_SCHOOL_ID

School's (6-digit max) ID number assigned by the department of ED required in all electronic communications between school and loan origination agency.

LOAN_STAFF_TOT_CODES

Identifies the list of tot codes for Stafford (subsidized) loans. Separate each tot code with a comma (e.g. STAF,STF1,STF2).

LOAN_SUMMARIZE_EFT_DEBIT

During the import of EFT roster files, should the debit side of the resulting G/L transaction represent a summarized amount for all disbursements (the debit side is typically the EFT wire cash account)? If "Y", only one G/L entry is posted with a single debit and one credit for each disbursement in the EFT roster file. If "N", the import process posts one G/L entry for each disbursement, resulting in several debits to the EFT wire account. For schools that use bank reconciliation to reconcile the EFT wire account, setting this option to "Y" allows for the most straightforward reconciliation--EFT monies are wired to the school in a lump sum single deposit that corresponds to the total amount of the disbursements in an EFT roster file.

LOAN_TABLE_CONTROL_GROUP

Unix group in which a user must have access to enable table option in loan tracking.

LOAN_UNSB_TOT_CODES

Identifies the list of tot codes for Stafford (unsubsidized) loans. Separate each tot code with a comma (e.g. UNSB,UNS1,UNS2).

Setting Up the Loan Origination Table

To set up Financial Aid Loan Processing, you must set up the table values in the Loan Origination Table (loanorig_table) to control the type of loans your institution processes.

Follow these steps to set up the table values in the Loan Origination table.

1. Access the Loan Summary screen for a selected student from the Financial Aid: Loan Tracking Main menu. For more information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in *Financial Aid Loan User Guide*.
2. Select **Tables** from the Commands menu. The Loan Tables menu appears.
3. Select **Loan Origination** from the Loan Tables menu. The Loan Origination table appears.
4. Select **Finish** from the Commands menu. The first entry in the Loan Origination table appears.
5. Is the current entry in the Loan Origination table the type of loans your institution processes?
 - If yes, go to step 6.
 - If no, select **Next** or **Previous** from the Commands menu until the desired values appear. Go to step 6.
6. Do you wish to change any of the field values on the selected table entry?
 - If yes, select **Update** from the Commands menu and modify the desired field entries, then select **Finish**. Go to step 7.
 - If no, go to step 7.
7. Remove the other table entries from the Loan Origination table by performing the following:

- Select **Next** or **Previous** from the Commands menu until the table entries you wish to remove appear.
- Select **Remove** from the Commands menu. The table entries are removed from the system.

Installing Financial Aid

Introduction

To complete the implementation of the features of the CX Financial Aid product, you must reinstall the Financial Aid product. These pages include instructions for installing the entire product.

Note: If you have only made minor changes to the Financial Aid product, you can save time by installing only those features that you modified.

Using a Script

If you write a script to reinstall Financial Aid, note the following:

- Begin the script with the following line: **#!/bin/csh -f**
- The pound sign (#) does not comment out the line, but ensures that the process will start in the correct location.
- The commands in the following procedure place the output in make.out files. If you place the commands in a script, remove the references to the make.out files and send the script's output to a file in /tmp.

How to Reinstall Financial Aid

The following lists the steps to reinstall the Financial Aid product.

1. Access the \$CARSPATH/macros/custom directory and enter the following:
% **make reinstall F=ALL >& make.out**
2. Access the \$CARSPATH/include/custom directory and enter the following:
% **make reinstall F=ALL >& make.out**
3. Access the \$CARSPATH/include/applic directory and enter the following:
% **make reinstall F="facomm" >& make.out**
4. Access the \$CARSPATH/include/util directory and enter the following:
% **make reinstall F="FA=fa94" >& make.out**
% **make reinstall F="FA= fa95 " >& make.out**
% **make reinstall F="FA= fa96" >& make.out**
% **make reinstall F="FA= facalc" >& make.out**
5. Access the \$CARSPATH/src/lib/libapp directory and enter the following:
% **make REINSTALL F=ALL >& make.out**
6. Access the \$CARSPATH/src/finaid directory and enter the following:
% **make REINSTALL F=ALL >& make.out**
7. Access the \$CARSPATH/src/regist/regent directory and enter the following:
% **make REINSTALL F=ALL >& make.out**
8. Access the \$CARSPATH/modules/finaid directory and enter the following:
% **make reinstall F=ALL >& make.out**
9. Access the \$CARSPATH/menuopt/finaid directory and enter the following:
% **make reinstall F=ALL >& make.out**
10. Access the \$CARSPATH/menusrc/student/finaid directory and enter the following:
% **make subs T=reinstall >& make.out**

SECTION 16 - FINANCIAL AID MAINTENANCE

Overview

Introduction

This section provides an explanation of the tasks needed to maintain the Financial Aid product. Jenzabar distributes Product Update tapes to your institution on an annual basis to provide updates to the financial aid information in CX. Product Update tapes can contain:

- End of Year updates, including: screen changes, FISAP updates, and Pell Payment updates
- Enhancements and new features
- Fixes to problems with the product
- Installation procedures

The README file included in the Product Update tape provides the specific installation procedures for updating your system.

Table Maintenance Tools

The Financial Aid product also provides SQL scripts for maintaining the Financial Aid tables. See *Table Maintenance* in this section for more information.

Maintenance

Introduction

Financial Aid Year End changes occur in the following two phases:

1. In November, to allow institutions the ability to process financial aid for the next financial aid award year, Jenzabar distributes the following on tape:
 - Need Analysis data entry screens for the current year renamed for the next financial aid award year
 - Estimated calculation methods
 - FISAP reporting changes
2. In February, after the Department of Education has issued its final changes, Jenzabar distributes on tape the new screens, and tape formats, and the calculation methods.

The following describes the general contents of the README file that accompanies the product enhancement tape, including new product features, problem fixes, and installation procedures.

Object/Schema File Changes

The Financial Aid product enhancement README lists the object files affected and schema files that you will need to build or rebuild, such as the following \$CARSPATH/schema/ files:

- student/naf
- student/esar
- student/natp
- student/fana
- student/faloan
- student/fatran
- student/stufa
- student/bstufa

Special Installation Considerations

The Financial Aid product enhancement README informs you of any special considerations to take into account when you install the enhancements. The following lists some example special considerations:

Downtime

You must plan for downtime for the Financial Aid, Bursar, Billing, and Registrar offices during the enhancement installation process.

Reinstall

You must reinstall the entire Financial Aid product so that the new macro values will be available.

Rebuild

You must have sufficient disk space available for the rebuilding of the naf_rec and natp_rec.

Problems and Solutions

The Financial Aid product enhancement README lists any identified problems and corresponding fixes for the Financial Aid product.

New Features/Enhancements

Along with a list of new features added to the Financial Aid product, the Financial Aid product enhancement README lists the year-end maintenance enhancements, including (for example):

- <Award Year> Need Analysis Data Entry screen changes, including:
 - FAFSA screens
 - Simulation screens
 - Institutional Methodology screens
 - FAF screens
- Financial Aid Transcript screens and the NASFAA-format form
- SAR report

Installation Phases

The Financial Aid product enhancement README provides installation instructions in the following phases.

Note: The README file provides the specific commands to enter in each step of the process.

1. Pre-Deposit step: you rename the src files in the finaid source directories.
2. Deposit step: you deposit the Product Enhancement files in the appropriate smo directory.
3. Pre-Install steps: you build the records with changes, for example:
 - esar_rec
 - naf_rec
 - natp_rec
 - faloan_rec
 - fatran_rec
 - stufa_rec
 - stufa_blob
 - fana_rec
4. Install step: you install the Product Enhancement files.
5. Post-Install steps:
 - You reinstall the following:
 - All programs dependent on the stufa_rec.
 - All menu options, screens, and programs for Financial Aid so that the new macro values will take effect.
 - You load the EDE processing table values for the financial aid award year.
 - You convert:
 - The faloan_rec.faloan_term field to beg_date and end_date.
 - The financial aid text files to blobs.
6. Verification steps: you test all regularly used processes of the Financial Aid product. Do the following in particular:
 - Bring up a new award year need analysis screen and process a student. Perform a new award year calculation of EFC.
 - Produce a Financial Aid Transcript.
 - Load PHEAA, CSS, FED, and GES tapes.
 - If your institution uses EDE, upload an ISIR and download an original and correction file.
 - Run the electronic SAR report
 - Verify that the fixes listed in the README's Problem and Solution section are corrected on your system.
 - Execute the Print Comment Text option in the Financial Aid menu for a student with text information.

- Create an original application and a correction application for the new award year. Make certain that the process creates the following files in the pfin home directory: eaps99in.dat and corr99in.dat.

Table Maintenance

Introduction

The Financial Aid product provides SQL scripts for maintaining tables that require entries on an annual basis. The scripts assist in the entry process by copying table entries from the previous year to the current year.

Table Copy SQL scripts

The following SQL scripts copy table entries from one year to another year.

Note: See *SQL Scripts* in this manual for more information about the scripts.

addproj

Copies Financial Aid Need entries

addtcply

Copies Compliance entries

addtctc

Copies contact and tickler records

addtfameth

Copies Need Analysis Methodology entries

addtpkg

Copies Packaging entries

adtfabgtas

Copies Budget Association entries

addtfafer

Copies Verification entries

addtaiddtl

Copies enrollment level entries

SECTION 17 - PROGRAM ERRORS AND CRASH RECOVERY

Overview

Introduction

This section provides the following:

- A list of serious and fatal errors for Financial Aid Audit and Need Analysis Tape Conversion programs
- Crash recovery procedures

Note: Refer to the following user guides for a list of the more common status, field error, and warning messages that can occur when menu users execute the programs in Financial Aid:

- *Financial Aid User Guide*
- *Financial Aid Packaging User Guide*
- *Financial Aid Need Analysis User Guide*
- *Financial Aid Electronic Data Exchange User Guide (EDE)*

Financial Aid Audit Errors

Messages Received

The following lists alphabetically the serious and fatal error messages that can appear when you are using Financial Aid Audit. Financial Aid Audit produces two types of error messages, processing errors and audit errors. The processing errors are run-time errors that may occur while Financial Aid Audit is running, and the audit errors are the data validation errors produced normally during an audit.

Financial Aid Audit Processing Errors

The following are the various messages printed by Financial Aid Audit during program processing and are sent by mail when the program finishes. If an error causes the program to exit before normal completion, the error will be mailed with the message "Fatal Error: program aborted" following the error. This kind of error must be resolved before Financial Aid Audit can be run again. When the error is resolved, rerun Financial Aid Audit using the same parameters.

NN audit errors found. Please check the audit output file: FFFF

This message gives the number of errors ('NN') found in the audit. The audit output file FFFF is the file created by Financial Aid Audit and contains the audit errors found.

Cannot open the error file: FFFF

The audit output file FFFF cannot be opened. Make sure that the directory CARSPATH/audit/finaid/faaudit has been created with the group carsprog able to access the directory for reading, writing, and execution. After resolving the error, rerun the program.

DBADD error on aidpkg_table: NN. Code='CC', Prog='PP', Type='TT

An error NN occurred when Financial Aid Audit attempted to add a record to the aidpkg_table. The record that Financial Aid Audit attempted to add was for the aid code CC', academic program PP', and aid type TT'. If this error occurs, report the exact error message to your account manager for resolution of the error.

DBFIND error onfile': NN

An error NN occurred when Financial Aid Audit attempted to find a record in the database file identified. If this error occurs, call your account manager for resolution being sure to report the exact error message.

DBSELECT error onkey': NN

An error NN occurred when Financial Aid Audit attempted to select the database keykey'. If this error occurs, call your account manager for resolution, being sure to report the exact error message.

DBSELECT fileopen error onfile': NN

An error NN occurred when Financial Aid Audit attempted to open the database file. If this error occurs, call your account manager for resolution, being sure to report the exact error message.

DBSTRUCTVIEW error onfile': NN

An error NN occurred when Financial Aid Audit attempted to do a structview on the database filefile'. If this error occurs, call your account manager for resolution, being sure to report the exact error message.

DBUPDATE error onfile': NN

A database file update error NN occurred when Financial Aid Audit attempted to update the filefile'. If this error occurs, call your account manager for resolution being sure to report the exact error message.

DatabaseCC'. DBSELECT: status = NN

An error occurred when trying to open the database CC'. If the error number NN is 6001, rerun the program again. The 6001 error may occur if a dbbuild or dbstatus process is running at the time of the error. If another error number is listed or the same error happens repeatedly, call your account manager for resolution of the error.

Error in checking transaction file status: XX

An error occurred when trying to access the files in the \$CARSPATH/vchpost directory. Report the error and the error number XX to your account manager.

Financial Aid Audit Usage: -y year -l subs [-u -m -o -i id numbers]

This message is printed if the parameters passed to Financial Aid Audit are invalid. See the Parameters section above for valid parameter values and combinations, and rerun the program with the valid parameters.

Financial Aid Audit completed successfully.

This message is printed when Financial Aid Audit finishes processing an audit and shows that the program completed without getting a run-time error.

Fatal Error: program aborted.

This message is printed when a program processing error occurs that the program cannot handle. The message in the mail above this message should identify the error that caused the fatal error.

Invalid package method code:CCCC

An invalid packaging method code CCCC was passed to FAAUDDIT with the -m parameter. Rerun the program with a valid packaging method or without the -m parameter.

Invalid subsidiary code:CC'.

An invalid subsidiary ledger code CC was passed to the program for the -l parameter. Rerun the program with a valid subsidiary code.

There were no audit errors found

This message is printed when Financial Aid Audit finishes an audit and there were no audit errors found. An audit output file was not created since there were not errors.

Audit Output Error Messages

The following messages are the various audit messages produced by Financial Aid Audit and are found in the audit output file in the CARSPATH/audit/finaid/faaudit directory. The name of the audit output file is of the format of date.time where date is the date the program was run in the format YYMMDD, and time is the time the program was started in the format HHMM. For example, if the program was started at 10:03 PM on 03/21/97, the file name would be 970321.2203. See the Output Samples section below for an example of an audit output file.

Notes:

- If the update (-u) parameter was given to the program (and there were no unposted financial aid vouchers), data errors updated will have an * following the error message printed. The error message will print the invalid data value found before the update. When using the update option, errors printing without an * following the error message are errors that cannot be updated by Financial Aid Audit. If the solution to the error is not known, call your account manager for resolution of the error.
- If the # symbol is printed at the beginning of an error message, the posting option to Financial Aid Entry should correct the error after Financial Aid Entry finishes and the Voucher Transactions file is posted.

These errors will be corrected the next time aid is posted.

This message is printed at the bottom of the audit and indicates that any error message containing an # can be resolved by posting financial aid for the session(s) identified on the line with the error message. Run the Financial Aid Entry posting option for the sessions

indicated and post the Voucher Transactions file created. Rerun the audit to make sure that the error was cleared up.

Aid amount != posted amount

The amount in the aid_rec for the student does not equal the amount in the corresponding subt_rec. Be sure that financial aid is then posted for the session indicated on the line with the error message. Then, rerun Financial Aid Audit to make sure that the error was cleared up.

Aid amt updated but not posted

This is a warning message indicating that the aid_amt amount was updated in Financial Aid Entry, yet has not been disbursed. When the next posting is done, this message should disappear.

Aid type not found: not added

The aid type for the aid code identified on the same line cannot be determined. This prevents Financial Aid Audit from adding the aidpkg_table for the aid code. Be sure that the aid code value is valid according to the aid_table and that the taid_frm_code for the aid code is a valid code from the taid_form_table. Then make sure that the taidform_type is a valid type according to the aid_type_table for the aid form. After validating and updating the aid_table, aid_form_table, and aid_type_table for the aid code, rerun Financial Aid Audit with the updated option.

Amt stat should be AD * , Amt stat should be AP * , Amt stat should be AP * , Amt stat should be EA or AA *

An invalid or incorrect aid status was found in the aid_amt_stat field. If the * is printed, the aid_amt_stat field will have been updated to the identified amount status value. The last error message, Amt stat should be EA or AA *, the aid_amt_stat field will have been updated to AA by default. If the status should have been EA, update the amount status through Financial Aid Entry. If the * is not printed with the error message, run Financial Aid Audit with the update option.

Award amount != aid total *

The taidpkg_awd_amt amount for an aid code is incorrect according to the aid_rec. If the * is printed, the amount will have been updated. If not, run Financial Aid Audit with the updated option.

Cancel amount != aid total *

The taidpkg_cancel_amt amount for an aid code is incorrect according to the aid_rec. If the * is printed, the amount will have been updated. If not, run Financial Aid Audit with the updated option.

Disb amount != aid total *

The taidpkg_disb_amt amount for an aid code is incorrect according to the aid_rec. If the * is printed, the amount will have been updated. If not, run Financial Aid Audit with the updated option.

Fund balance audit error total: NN

This message shows that NN errors were found in the second pass of Financial Aid Audit that audits the fund balances in the aidpkg_table.

Invalid aid code

An invalid aid_code was found in the aid_rec according to the aid_table. If the aid_code is a valid code, add it to the aid_table. If the aid_code is not valid, update the aid_code field. Rerun FAAUDIT with the update option to ensure that the aidpkg_table has been updated properly for this aid code.

Invalid aid status

An invalid aid_stat value was found in an aid_rec for the aid code identified on the same line. Fix the aid status value through the Financial Aid Entry program and rerun Financial Aid Audit with the update option.

Invalid amount status

An invalid aid_amt_stat value was found in the aid_rec. The amount status value can be updated by the Financial Aid Audit program if the aid_stat value is valid in the same aid_rec. An invalid package method was found in the aid_rec. This will occur only if the -m parameter is not used or is ALL. If the package method is valid, add it to the pkg_table. If the package method is not valid, update the aid_pkg_field. Rerun Financial Aid Audit with the update option to update the aidpkg_table properly.

Invalid package status

An invalid stufa_pkg_stat was found in the stufa_rec for the student identified on the same line. Update the package status through the Financial Aid Entry program and rerun Financial Aid Audit to ensure that the error and any related errors are corrected.

Invalid packaging status

An invalid aid_pkg_stat was found in the aid_rec. Update the packaging status through the Financial Aid Entry program.

Invalid program code

An invalid program code was found in the stufa_prog field for the identified student. Update the program value through the Financial Aid Entry program and rerun Financial Aid Audit with the update option to make sure that the aidpkg_table has the correct amount totals.

No aid recs: awd amt != 0 *

An aidpkg_table was found with an taidpkg_awd_amt not equal to zero for an aid code and academic program code combination that cannot be found in the aid_rec and stufa_rec. If the * is printed, the amount has been updated to zero. If not, run Financial Aid Audit with the update option to zero the amount.

No aid recs: cancel amt != 0 *

An aidpkg_table was found with an taidpkg_cancel_amt not equal to zero for an aid code and academic program code combination that cannot be found in the aid_rec and stufa_rec. If the * is printed, the amount has been updated to zero. If not, run Financial Aid Audit with the update option to zero the amount.

No aid recs: disb amt != 0 *

An aidpkg_table was found with an taidpkg_disb_amt not equal to zero for an aid code and academic program code combination that cannot be found in the aid_rec and stufa_rec. If the * is printed, the amount has been updated to zero. If not, run Financial Aid Audit with the update option to zero the amount.

No pkg table: awd amt > 0 * , No pkg table: cancel amt > 0 * , No pkg table: disb amt > 0 *

Based on the aid_rec and stufa_rec, an aidpkg_table should be added and the indicated amount updated for the aid code and program code identified on the same line as this message. If the * is printed, the aidpkg_table will have been added. If not, run Financial Aid Audit with the update option to correct the error.

Simulation: disb amt != 0 *

A simulated package method had a disbursed amount not equal to zero. If the * is printed, the aidpkg_table will have been updated to zero. If not, rerun Financial Aid Audit with the -u parameter to correct the error.

Simulation: cancel amt != 0 *

A simulated package method had a disbursed amount not equal to zero. If the * is printed, the aidpkg_table will have been updated to zero. If not, rerun Financial Aid Audit with the -u parameter to correct the error.

Student audit error total: NN

This message is printed following the audit and gives the number of audit errors found in the first pass of the Financial Aid Audit program.

Total aid != offered amount *

The stufa_tot_offer field contains an invalid amount according to the student's aid package. If the * is printed, the error will have been corrected. If not, run Financial Aid Audit with the update option to correct the error.

Unposted fin. aid voucher: FAcXXXXX

A financial aid voucher transaction file FAcXXXXX was found when the -u option was passed to Financial Aid Audit.

Override option specified. Update will take place. Update aborted. Run Financial Aid Audit after voucher file(s) to update.

If there are unposted financial files when the -u parameter is used, one of these two messages will be mailed to the user. If the -o parameter was used the update will continue; if the -o option was not used, Financial Aid Audit will not update errors and the Update aborted . . . error message will be mailed to the operator. To update errors if the update was aborted: rerun Financial Aid Audit after either posting the voucher transactions, removing the file FAcXXXXX from the CARSPATH/vchpost directory, or use the -o parameter.

Crash Recovery

Financial Aid Audit is designed to be rerun as often as necessary. When the program exits unexpectedly and the error is resolved, rerun the program.

Tape Conversion Errors

Messages Received

The following lists alphabetically the serious and fatal error messages that can appear when you are using Financial Aid Tape Conversion.

Financial Aid Tape Conversion Processing Errors

The following are the various messages printed by Financial Aid Tape Conversion during program processing and are sent by mail when the program finishes.

Cannot process GWEN H. GUNDERS Serial = 357: Blank SS No.

Any time a blank social security number is found on the tape, that student's information cannot be processed since the proper ID number cannot be determined for the student. If you wish to load the need analysis information for a student in this case, obtain the student's social security number and update the social security number field in the Need Analysis Tape Record. This is done by selecting the menu option, Update Tape SS Numbers, which displays a PERFORM screen allowing updates to the social security number field. Once the social security number is updated, rerun the NATP program.

Cannot process ORSON ODELL', SS#151-61-4789': ID record not found.

When the NATP program cannot find the listed social security number in the ID Record, further processing cannot be done for that student. Before the student can be added to the Financial Aid Database, the student must first be added to the ID Record. To assist in getting the names, addresses, and basic profile information for these new students, the menu option, Need Tape Leads Report will produce a report listing students on the tape who are in the ID Record. Once the students have been entered into the ID Record, rerun the NATP program.

Duplicate tape record found for SS#399-49-7782', Serial: 359.

This message is printed when duplicate student information is found in the Need Analysis Tape Record. This can happen when a need analysis tape contains duplicate records for the same student, when several cumulative tapes are loaded, or when a need analysis tape is loaded two or more times. Duplicate records are flagged when the social security number (natp_ss_no), need analysis revision date (natp_rev_date), MDE code (natp_tape), and award year (natp_fayr) contain the same values as another record. When duplicates are found, the NATP program will pick the record with the highest serial number (natp_no) value for processing. Duplicate records are marked with a D value in the Need Analysis Tape Record's status field (natp_stat).

ID#28116: Birthdate difference: Profile_rec = 04/17/67, Tape = 04/17/68.

ID#28116: Student marital status difference: Profile_rec = T, Tape = S.

Since the Financial Aid Office maintains its own student birthdate and marital status fields separate from the Profile Record, these warning messages are printed to identify when the need analysis tape contains different information than that found in the Profile Record. The Financial Aid Office should contact the office responsible for maintaining the Profile Record and correct the discrepancies.

SS#232-42-5781: Not processed: Tape information is not up to date.

The transaction number equals the current date and the tape date is equal to or greater than the current date.

SS#212-22-4785: Not processed: Allow Tape Update Flag is N'.

When the need analysis information loaded from the tape is older than the information in the Financial Aid Database, the NATP program will not automatically overwrite the student's data with the tape data. The second message is printed when the Allow Tape Update field

(natp_allow_upd) is set to No. To force the student's information to be loaded, use the NATP overwrite (-o) option and rerun the NATP program. If only a select number of students are to be loaded using the overwrite option, it may be better to run the NATP program using the social security number option. This will prevent unwanted overwrites to occur on other students.

Error and Crash Recovery Procedure

Core Dump Recovery

The following procedure describes the steps to recover from a core dump of an entry program.

1. Access the program screens directory for the entry program.
Example: % cd \$CARSPATH/modules/finaid/progscr/faentry
2. Reinstall each program screen file.
Example: % make reinstall F=<filename>
Note: You can also reinstall all of the screens by entering the following:
% make reinstall F=all
3. Attempt to execute the entry program. Did the reinstall of the program screens fix the error?
If yes, you are done.
If no, go to step 4.
4. Access the source code directory of the entry program.
Example: % cd \$CARSPATH/src/finaid/faentry
5. Reinstall the source code for the entry program.
Example: % make reinstall
6. Attempt to execute the entry program. Did the reinstall of the program source code fix the error?
If yes, you are done.
If no, go to step 7.
7. In the source code for the entry program, delete the old compiled code for the entry program.
Example: % make cleanup
8. Reinstall the entry program source code.
Example: % make reinstall
9. Attempt to execute the entry program. Did the deletion of the old code and reinstallation of the program source code fix the error?
If yes, you are done.
If no, go to step 10.
10. Review the libraries for the entry program. In the source code for the entry program, review the file, Makefile. In the file, search for the parameter, ADDLIBS, which identifies the libraries that you must reinstall.
Example: % vi Makefile
/ADDLIBS
11. Reinstall the libraries and the source for the entry program.
Example: % cd <to appropriate library>
% make reinstall

% cd \$CARSPATH/finaid/faentry

% make reinstall

Note: You must reinstall the source program to include any library changes.

12. Attempt to execute the entry program. Did the reinstallation of the libraries for the entry program fix the error?

If yes, you are done.

If no, call Jenzabar Support Services.

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