



JENZABAR CX

Financial Aid

Implementation Guide

Configuration and Maintenance

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Using 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. Use it in conjunction with the corresponding Technical Reference manual.

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

Conventions Used in This Manual

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 of a potential risk or condition. This is what it'

Warning!

Indicates a 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:

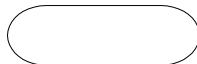
Process

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

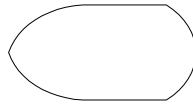
Predefined Process

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

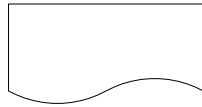
Used only for exception situations. The Process symbol is the standard symbol.

Terminator

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

Display

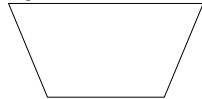
Represents data displayed on a screen or window. Used for all menus including the master menu.

Document

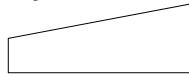
Represents an output report, forms, or any readable data, either hardcopy or displayed on a screen.

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>).



Customizing Processes

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

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.

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

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 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 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
6. Partial Aid Detail (prtl_aid_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.

7. Enrollment Schedule table (faschd_table)
8. Enrollment Status Session table (schdsess_table)
9. Aid Detail table (aiddtl_table)
10. Financial Aid Session table (fasess_table)
11. Financial Aid Expense Item table (fa_item_table)
12. Financial Aid Budget table (fabgt_table)
13. Financial Aid Expense Association table (fabgtas_table)
14. Budget Group table (bgtgrp_table)
15. Budget/Group Association table (bgtgrpas_table)
16. Financial Aid Budget Expense Association table (faexpas_table)
Optional
17. Tickler table (tick_table)
18. Contact table (ctc_table)
19. SAP Track table (saptrk_table)
20. Financial Aid SAP table (fasap_table)
21. SAP Action table (fasapact_table)
22. Criteria table (crit_table)
23. SAP Criteria table (sapcrit_table)

- 24. Compliance Association table (cplyas_table)
- 25. Compliance Requirements table (cply_req_table)
- 26. Compliance Sequence table (cply_seq_table)
- 27. Compliance Criteria table (cply_crit_table)
- 28. Packaging Method table (pkg_table)
- 29. Package Objective table (pkgobj_table)
- 30. Aid Packaging Criteria table (aidpkg_table)
- 31. Verification table (faver_table)

Need Analysis Extended Tables

Beginning with the 0809 award year, some Need Analysis tables were redesigned to use year-specific tables to hold the data. This approach cleanly separates Need Analysis data, which allows obsolete columns to be dropped. This conserves space and clarifies what data is actually available for the EFC calculation in a given year. It also keeps older data in tables named by their year, making it simpler to archive and clean up obsolete records.

These tables include:

- esar_rec, esar0809_rec, ... esar1213_rec (Institutional Student Information Report record)
- naf_rec, naf0809_rec, ... naf1213_rec (Need Analysis Form record)
- natp_rec, natp0809_rec, ... natp1213_rec (Financial Aid Tape Conversion record)
- nslds_rec, nslds0809_rec, ... nslds1213_rec (National Student Loan Data System record)

The following tables also store supplemental information:

- natpgrant_rec, natpgrant0809_rec, ... natpgrant1213_rec (related to natp_rec)
- natploan_rec, natploan0809_rec, ... natploan1213_rec (related to natp_rec)
- natpnslds_rec, natpnslds0809_rec, ... natpnslds1213_rec (related to natp_rec)
- nsldsgrant_rec, nsldsgrant0809_rec, ... nsldsgrant1213_rec (related to nslds_rec)
- nsldsloan_rec, nsldsloan0809_rec, ... nsldsloan1213_rec (related to nslds_rec)

Several components exist to assist using these tables.

1. A Library for C Programs

The C programs and libraries should not make their own SQL calls to access the traditional tables. Instead, those operations are replaced with calls to a library that handles all operations so the year-specific tables are used when appropriate. The library is named **Libfayrdb**, and instead of calling SELECT on naf_rec, the code should do the following:

- `SQLCODE = fadb_naf_get_rec(&fynaf_rec, id, method);`

`fynaf_rec` is a special structure defined in `include/applic/fynaf` to contain a union of the year-specific data, and a copy of the traditional data for backwards-compatibility. Before using `fynaf_rec`, it must be constructed with a call to `fadb_naf_ctor()`. See the code in the following locations for more information:

- `include/applic`
- `src/Libapp/Libfayrdb`

2. Wrapper Scripts Used to run SQL informers and ACE reports

- Use `SCP_PATH/finaid/runinffayr.scp` instead of `RUN_INFORMERS`. Informers invoked from menu options or the Document Review Script are run by the macro `RUN_INFORMERS`. However, for informers that reference any of the above tables and the Award Year is one of the input options, it's better to run the informer with **`SCP_PATH/finaid/runinffayr.scp`**. This special script has the following benefits:

- It dynamically replaces all instances of the generic table name (such as `naf_rec`) with its year-specific version as needed. So, for award year 0708, the name is not changed, but for 0809, the table name is changed to `naf0809_rec`.
- If another informer exists that contains both the target's name and the award year as a suffix, it runs the year-specific informer instead. For example, if the informer to run is named `updexport` and the input award year is 0809, an informer named `updexport0809` would be run if found. If not, the `updexport` would be run as normal.

This provides options to the user: maintain one informer using generic table names and allow dynamic name replacement to handle the details, or write a year-specific informer for each award year.

Special note for the Document Review Script: These informers are run from within yet another script. To streamline how these informers run, the Document Review Script provides definitions to dynamically replace the generic table names with year-specific versions as well. The definition (a shell script variable) is simply added to the command that runs the informers as needed. This can reduce the overhead maintaining the Document Review Script and its informers by allowing that script to call `RUN_INFORMERS` as normal.

- Use `SCP/finaid/runrepfayr.scp` instead of `RUN_REPORTS`. This applies to both the standard ACE reports (in the **reports** directory) and to dynamically compiled ACE reports (in the **others** directory). Reports that are invoked from menu options are run by the macro `RUN_REPORTS`. However, for reports that reference any of the above tables and the Award Year is one of the input options, it's better to run the informer with **`SCP_PATH/finaid/runrepfayr.scp`**. This special script has the following benefits:

- For dynamically compiled reports only: Dynamically replaces all instances of the generic table name (such as `naf_rec`) with its year-specific version as needed. So for award year 0708, the name is not changed, but for 0809, the table name is changed to `naf0809_rec`.

- For both types of reports: If another informer exists that contains both the target's name and the award year as a suffix, it runs the year-specific informer instead. For example, if the informer to run is named isircmp and the input award year is 0809, an informer named isircmp0809 would be run if found. If not, the isircmp would be run as normal.

This script provides benefits that are similar to what runinffayr does for informers. However, it cannot dynamically replace generic table names if the report is compiled at install-time as in the **reports** directory. It can only perform name replacement for dynamically compiled reports in the **others** directory, as those files are compiled at run-time.

3. Views Combining the Generic and Year-specific Tables

The wrapper scripts described in Item No. 2 above have an important limitation: the award year must be known when run. Some processes span award years or the specific year may not be available. To assist in these scenarios, views exist that combine all of the rows for each generic table and its year-specific counterparts. The naming convention simply replaces “_rec” with “_vw” from the generic table's name. So the view **naf_vw** can be used to query naf_rec, naf0809_rec, etc., at once.

While views could certainly be used in any of the scenarios described above for informers and reports, it's recommended to use views with discretion. Because the views have to combine two or more tables, a query may have to join the tables into a temporary table containing all of the rows first **before** applying any filtering criteria. This means these views will likely be slower, so if an operation has an award year as an option or parameter, it's always better to use the wrapper script option instead.

Further, due to backwards-compatibility concerns, the views delivered in the standard product will always contain all award years. However, a specific site can make a judgment call regarding how many award years to include, so a specific site could modify the views' source to restrict it to recent/active/relevant award years. Another tactic is to make a local copy of the view with a different name, and restrict the copy's award years.

For example, copy naf_vw's source file to another name and change the copy's view name to activenaf_vw. Next, change the **where 1 = 1** clause in the file to something like **where fa_yr in ('0910', '1112', '1213')** so that only the three years from naf_rec would be returned by activenaf_vw. For schools with lots of historical data, using activenaf_vw instead of naf_vw could have dramatic gains in performance, but still leave the option of using naf_vw as needed by select processes.

Finally, these views will not be capable of inserting, updating, or deleting records from the appropriate database tables. Any process that needs to perform those tasks must either use the wrapper scripts or another process that can operate on the correct database tables, and not use views.

Building the Primary Financial Aid Tables

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> Aid Tables menu. Aid Form table entries appear in the middle portion of the table screen.

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: Aid Tables 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 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: Aid Tables 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 sub_t_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 fndg_{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 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 an aid is to be printed on the Student Data Sheet (SDS).

Apply Against SDS Bill Charges

A logical flag indicating whether 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 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 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 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/NDL, 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. This field is no longer updatable. Values are set by the system.

Use in Automated Packaging

A logical flag indicating whether 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.

DSL Loan Type

A value used for all loans that are included in loan tracking. The value must match a loan type in the Loan Type table. The CommonLine Stafford loan has a DSL Loan Type of 01. For COD Direct Lending, the DSL Loan type should map to the type of loan (i.e., P for PLUS loans, S for Subsidized Stafford loans, and U for Unsubsidized Stafford loans).

Combo Loan Type

A value used for loans that are included in loan tracking. If the CommonLine Stafford loan is to be a Combination loan, this value should be set to 07. If it is not a Combination loan, leave this field blank.

Loan Origination

The loan origination agency that corresponds to the loan type. This field is present for the Loan Autocreation feature. If this field is left blank, LOAN_DEFAULT_LOANORIG from the Configuration Table will be used instead.

Lender Fee Percent

The percentage of the gross loan amount payable to the lender (e.g., 3.0). This percentage is applied only if you are using the Loan module; otherwise, the Percentage Applied field is used to compute the net amount of the aid for the student. This field is no longer updatable. Values are set by the system.

Guarantor Fee Percent

The percentage of the gross loan amount payable to the guarantor (e.g., 0.5). This percentage is applied only if you are using the Loan module; otherwise, the Percentage Applied field is used to compute the net amount of the aid for the student. This field is no longer updatable. Values are set by the system.

IPEDS Type

A code designating the type of aid for IPEDS reporting (e.g., FG (Fed Grant), SG (State Grant), IG (Institution Grant), FL (Fed Loan), OL (Other Loan), FW (Fed Work Study), OW (Other Work Study)).

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.

Aid/Grant Association Table

The Aid/Grant Association table (aidgrantas_table) links Aid Codes to Grant Types. This allows more than one Aid Code to be defined for each Grant Type, and any number of Grants are possible.

You access the Aid/Grant Association table through the Grant Types/Aid Assoc. menu option on the Financial Aid: Table Maintenance: Aid Tables menu. The Grant Type table and the Aid Association table appear on a single screen. These two tables have a master/detail relationship. The Grant Type table, which appears at the top, should not be modified by the institution. The Aid Association table, which appears at the bottom of the screen, allows you to associate an aid code with a particular grant type.

The Aid Association table has one field:

Aid Code

A code used to identify a financial aid award. These codes are defined in the Aid Table (aid_table).

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: Aid Tables menu.

Note 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., 1112).

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.

Partial Aid Detail Table (Aid Packaging Criteria Table)

The following lists the fields in the Partial Aid Detail table in the order in which you complete them. To access this table, select Partial Aid Detail from the Financial Aid: Table Maintenance: Aid Tables menu.

Note The Disbursements are only created when the award is initially created.

When an Award is created with the following parameters:

Aid Code

The Aid table code associated with the partial aid.

Financial Aid Year

The Financial Aid award year (e.g., 1112).

Session

The session associated with the partial aid.

Year

The year associated with the partial aid.

a Disbursement is created with the following properties:

Disbursement Date

The disbursement date for part of the award.

Amount/Percent

The initial percentage or fixed amount to award on the disbursement date.

Amount Type

The type of amount using the following codes:

- D(ollar)
- R(ounded %)
- T(runcated %)
- L(eftover)

Year

The year associated with the partial aid.

Building the Enrollment Status Tables

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., 1112) 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., 1112) associated with the session and year values.

Last Day For 100% Refund

The last date (mm/dd/yyyy) in the session in which a student is entitled to a full refund.

Last Day in Refund Period

The last date (mm/dd/yyyy) 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

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 to charge the costs for this budget item to the student.

Print on Award Notice

A logical flag that indicates whether 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., 1112) 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., 1213) 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

The Document Tracking processes in the Financial Aid product use the following common tables:

- Tickler table (tick_table)
- Contact table (ctc_table)

In addition, if you want to be able to automatically send letters in response to certain ISIR codes, you will need to set up the Contact-Edit Table to establish relationships between ISIR codes and contact codes. For example, if certain

information is missing, a specific letter can be sent automatically. Similarly, a letter can be sent indicating completion or denial.

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., FY11 is the tickler code for the 1112 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 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., FY09) 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.

Contact-Edit Table

The following lists the fields in the Contact-Edit table in the order in which you complete them. To access this table, select Contacts to ISIR Edits from the Table Maintenance: Contact/Tickler menu.

Award Year

The financial aid award year for which the student is applying or has applied. The year must be in the following form: ####. For example, 1112 is the expression for financial aid award year 2011-2012.

Financial Aid Edit Code

This field contains the ISIR code that you wish to relate to a corresponding contact (for example, C272).

Tickler Code

The tickler code (e.g., FY09) to associate with the contact.

Contact Code

The contact code for the correspondence you wish to send in response to the ISIR code listed above in the Financial Aid Edit Code field. For example, for an ISIR code indicating issues that affect eligibility, a warning letter could be sent. The contact code for this letter (for example, "WARN"), would appear in this field.

Building the Privacy Table

The purpose of the privacy table is for schools to define codes in which the student has given permission for their financial aid information to be released to a third party.

Access

You access the Privacy table from the Table Maintenance: Privacy Table menu.

Privacy Table

The following lists the fields in the Privacy table in the order in which you complete them. To access this table, select Privacy Table from the Table Maintenance: Privacy Codes menu.

Code

This value allows you to enter up to four characters (numeric or alpha) to identify the code you are establishing.

Description

A description of the code entered, up to 26 characters.

Building the Satisfactory Academic Progress Tables

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 institution-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 criterion 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
- PROB
- SUSP
- FAIL
- WARN
- APPL (appeal approved)
- FFAL (fail SAP)
- FPAS (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., FFAL, FPAS) for the student.

Previous SAP Code

The previous Satisfactory Academic Progress code for the student that the student met (e.g., PASS, PROB, SUSP).

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.

The recommended stored procedures are sapcumhrs, sapcurhrs, and sapgpa, which will populate sap_rec.

If you wish to update the stufa_rec when running SAP, you will need to use the fasapcumhrs, fasapcurhrs, and fasapgpa stored procedures.

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.

Note 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

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	GOOD	
FFAL	PROB		Contact for a probation letter
PROB	PASS	PROB	
FFAL	SUSP		Contact for suspension letter
			Aid Code entries, e.g., PELL
			SEOG. Aid Status = 'H'old
APPL (appeal, approved, or on appeal)	PASS	PROB	
	FAIL	SUSP	Contact for suspension letter
			Aid Code entries, e.g., PELL
			SEOG. Aid Status = 'H'old
SUSP	PASS	PROB	
FFAL	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, FFAL,FPAS 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	
Parent SAP Track	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, updating the sap_rec:

Parent SAP			SAP		
Parent SAP Track		Criteria	Code	Criteria Code	Operator
Procedure					
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

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 the compliance association must be satisfied at the time of awarding the aid.

Require to Disburse

A logical flag that indicates whether 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 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:

File Code	Database File	Session Value	Year Value
-----------	---------------	---------------	------------

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 or naf1112_rec	YEAR	0
NEED	faneed_rec	YEAR	0
NSLD	nslds_rec or nslds_1112_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:

Operator	Description
=	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., 2010) 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., FY10) 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 SAP Processing

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

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 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, 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 CriteriaTable

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. You can also package aid up to either the amount of need or the total cost.

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, both to need and to total cost (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.

Objective	Package Percentage	Maximum
Jobs	20%	\$1800 (20% times 9000)
Loans	30%	\$2700 (30% times 9000)
Grants	50%	\$4500 (50% times 9000)
		\$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
- Aid Base (need-based, cost-based, or both)
- Stored procedure name (the name of the stored procedure to use to set the maximum award; Jenzabar supplies an example procedure in \$CARSPATH/procedures/student/pkgaidsample)

In addition, the Aid Package Criteria table includes the following information if you are using the decision tables to provide student populations with aid packages:

- Amount Decision (a value corresponding to a decision code in the fadec_table)

Jenzabar supplies entries to the decision tables for the reserved codes STAF and UNSB so that you can disburse STAF aid up to the amount of need, and UNSB aid up to the amount of cost, based on federally defined dollar amounts.

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:

- If you are using a store procedure of decision to assign the maximum amount, you must leave the recommended amount field equal to zero.
- 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 must be a non-zero value if a stored procedure or decision code is not used. 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%), 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 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 over-award 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

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.scf*) 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 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 Guide and Technical Reference* 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:
2. % cd /etc
3. % vi passwd

4. Make the pcfm login a C shell user rather than a menu user by making the following edit:
5. Locate the following reference on the last line in the file, `:/usr/carsi/install/utl/menucsh`.
6. Replace the above reference with `:/bin/csh`.
7. Enter `:wq` to exit and save your changes to the `passwd` file.

How to Set Up the *pcfm* .login and .logout Files

The following lists the steps to use the `pc-login` file as a template for the `.login` file for the *pcfm* 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 `$CARSPATH/modules/finaid/documents/setup/ede` directory.
2. Copy the `pc-login` file to the `pcfm` directory path (e.g., `cp pc-login ~pcfm`).
3. Access the *pcfm* directory path and access the `pc-login` file in the `vi` editor by entering the following:
`% cd ~pcfm`
`% vi pc-login`
4. Do you want to change the default file transfer protocol, *zmodem*?
5. If yes, perform the following:
 - o Locate the following line: `$CARSPATH/install/scp/finaid/pcxmit.scp`
`zmodem`
 - o Replace the word *zmodem* with the file transfer protocol to be used (e.g., *xmodem*).
6. If no, skip to step 6.
7. Enter `:wq` to exit and save your changes to the `pc-login` file.
8. Copy the `pc-login` file to the `.login` file to replace the existing *pcfm* `.login` file (e.g., `cp pc-login .login`).
9. Access the `.logout` file in the `vi` editor by entering the following:
`% vi .logout`
10. Comment out any lines in the `.logout` file.
11. Enter `:wq` to exit and save your changes to the `.logout` file.

Disabling EDE Processing

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 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 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 Document Tracking

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*, *emplpell*, *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

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(es) 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

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.....[FY10]
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.....[FY10]
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.....	[FY11]
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          ]

          CARS College              ID#:[id          ]      SS#:[ssno          ]
Financial Aid Award Letter         [stuname         ]
for[fayr ]Academic Year            [line0  #####NOTE: You may   ]
[datel  ]                          [line1  use less than four   ]
                                [line2  lines of address.        ]
                                [line3                                     ]
RETURN BY: [rdatel  ]              [line4                                     ]

#####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:
          [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 ]
[cbb^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 ] [bctot ] [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 KZ00)
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;
bsmb1: 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;
csmb1: 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;
dsmb1: 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;
          abcnnet = totbg - totabc; abcdnet = totbg - totabcd
#####NOTE: line abcnnet 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;
abcnet: 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;
abncn: void, default="          ", format="###&.&&", optional;
abcdn: void, default="          ", format="###&.&&", optional;
abcna: void, default="          ", format="###&.&&", optional;
abcnb: void, default="          ", format="###&.&&", optional;
abncn: void, default="          ", format="###&.&&", optional;
abcdn: void, default="          ", format="###&.&&", optional;
abcna: void, default="          ", format="###&.&&", optional;
abcnb: void, default="          ", format="###&.&&", optional;
abncn: void, default="          ", format="###&.&&", optional;
abcdn: 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 abcdtd 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;
abctd: 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

You must set up the following to implement Financial Aid Loan:

- Loan Configuration macros
- Loan Origination Table (loanorig_table)*
- Loan Type Table (loantype_table)*

Other tables used in Financial Aid Loan are as follows:

- Loan Status Table (loanstat_table)
- Disbursement Status Table (disbstat_table)
- Aid Table (aid_table)
- Lender Table (lender_table)
- Loan Disbursement Table (loandisb_table)
- Loan Period Table (loanprd_table)
- Loan Guarantor Table (loanguar_table)

CAUTION

*Jenzabar maintains these tables and strongly recommends that your institution *not* make any modifications to them. Loan processing errors can occur.

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

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

Configuration Table Entries for the Loan Edit Check Feature

To support the edit check feature in Financial Aid Loan, you must modify the following Financial Aid Loan Configuration table entries 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, 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, PLUSFA10. The ctc_rec.tick is set to "FY" + aid_rec.fa_yr [1, 2]. For example, FY10.

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_GRAD_PLUS_TOT_CODES

Identifies the list of Tot codes for Graduate Student PLUS loans.

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(mail)
- P(aper)
- W(eb)

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.

Setting Up the Loan Status Table

The Loan Status Table includes a flag that indicates if a loan can be accepted or declined on the web. Processing the student's choices does not change a loan's state or any disbursement's state; it only changes FAENTRY states. However, this allows the school to block web accept/decline based on a loan's state. The default setup allows acceptance only for Entered and Certified loans.

Setting Up the Loan Type Table

The Loan Type table (loantype_table) defines the types of loans your institution recognizes. Specifically, it includes the following fields:

Alt Loan Type Code

A three-character code indicating the specific category of the alternative loan.

Alternative

A Y(es)/N(o) flag indicating whether the loan is considered an alternative type.

Application Code

The federal application form code (for CommonLine loans) or import type code (for Direct loans). Valid values include B (STAF/UNSB) or Q for PLUS CommonLine, and SA (STAF), UA (UNSB), or PA (PLUS) for Direct.

Borrower

A code indicating whether the borrower is a student or a parent. Valid values are S and P.

Description

A description of the loan type.

Loan Import Type

The loan import code for CommonLine response files. Valid values include PL (PLUS), SF (STAF), SU (UNSB), AL (OTHR), and CS (STAF/UNSB).

Loan Type

A two-character code designating the loan type (e.g., Stafford, unsubsidized Stafford or PLUS).

Lookup Category

A code indicating the screen (Stafford or PLUS) on which this table entry should appear in the lookup window.

Origination Agency

The loan origination code that supports this loan type.

Parent

A Y(es)/N(o) flag indicating whether the loan is considered a parent type loan.

Student Bor

A Y(es)/N(o) flag indicating whether the alternative borrower is also the student.

Subsidized Stafford

A Y(es)/N(o) flag indicating whether the loan is considered a subsidized Stafford loan.

Unsubsidized Stafford

A Y(es)/N(o) flag indicating whether the loan is considered an unsubsidized Stafford loan.

Setting Up the Loan Disbursement Table

The Loan Disbursement table (loandisb_table) establishes the dates on which disbursements expect to be received in each session (i.e., semester or quarter). The Loan module uses the dates in this table while generating loan disbursements.

If a disbursement is created after the date defined in this table, the system will use the date computed seven days after the current date.

The following fields are available in this table.

Academic Session

The academic session for the disbursement.

Academic Year

The academic year for the disbursement.

Disbursement Date

The date of the first disbursement for non-First-time Freshmen.

Disbursement Date 2

The date of the second disbursement if there are two disbursements in a term.

Financial Aid Year

The financial aid year for the disbursement.

Hold 30 Date

The date of the first disbursement for First-time Freshmen (FF classification).

Setup Issues

You need to maintain this table each year.

You must create an entry in this table for each session (i.e., semester or quarter) in the financial aid year.

You must enter a date in both the “Hold 30 Date” and “Disbursement Date” fields for each entry. The “Hold 30 Date” field defines the expected date of the first disbursement for first-time freshmen, which is different than the standard disbursement date for other students.

Setting Up the Loan Period Table

The autocreation feature, as well as other loan processes, requires that the Loan Period table include information about disbursements. The following examples demonstrate ways you can complete this table.

LOAN PERIOD TABLE		1 of 2
Loan Period.....	FS	
Description.....	FALL 11 - SPRING 12	
Financial Aid Year.....	1112	
Academic Session.....	FA	
Academic Year.....	2011	
Percentage.....	50.00	
Round/Truncate.....	R	
Display in Lookup.....	Y	
Num of Disb This Session..	1	
First Disbursement Num....	1	
LOAN PERIOD TABLE		2 of 2
Loan Period.....	FS	
Description.....	FALL 11 - SPRING 12	
Financial Aid Year.....	1112	
Academic Session.....	SP	
Academic Year.....	2012	
Percentage.....	50.00	
Round/Truncate.....	T	
Display in Lookup.....	N	
Num of Disb This Session..	1	
First Disbursement Num....	2	

In the above example, the period “FS” has two sessions, FA 2011 and SP 2012, each having one disbursement. The “First Disbursement Num” field sets the order of the disbursements; FA 2011 will be first (because the first disbursement for this session is number 1) and SP 2012 will be next (because the first disbursement for this session is number 2).

One and only one session can have “Display in Lookup” set to Y, which is used by table lookup commands on Financial Aid screens. This period would appear multiple times if this field was set to Y in more than one session, or not at all if all sessions were set to N.

The “Percentage” field divides the loan amount between the disbursements. “Round/Truncate” indicates if the percentage amount should be rounded to the nearest dollar amount, or truncated. Jenzabar suggests you truncate one session and round the others, as in the above example.

The following example is for single-semester loans:

LOAN PERIOD TABLE		1 of 1
Loan Period.....	FA	
Description.....	FALL 2011 ONLY	
Financial Aid Year.....	1112	
Academic Session.....	FA	
Academic Year.....	2011	
Percentage.....	100.00	
Round/Truncate.....	R	
Display in Lookup.....	Y	
Num of Disb This Session..	2	
First Disbursement Num....	1	

The FA 2011 only period has two disbursements. The loan amount is always divided equally between multiple disbursements in one session. The second (or higher) disbursement uses the “Disbursement Date 2” from the Loan Disbursement table.

Additional Information

The Loan Period table (loanprd_table) establishes the standard disbursement policies for your institution. For example, you may choose to disburse a loan in three equal disbursements over three semesters, or you may allow a loan to be distributed in two equal disbursements over two semesters.

Entries in the Loan Period table drive the defaults in the loan tracking screen based on the beginning and ending dates defined in the Academic Calendar for the specified sessions and years. The loan period code entries in this table are associated with specific sessions and years that are defined with session begin and end dates in the Academic Calendar record (acad_cal_rec).

The following fields are available in this table.

Loan Period

The loan period code to associate disbursement sessions (i.e., 3Q, FA).

Description

Description of the loan period code.

Financial Aid Year

The financial aid year for this loan period.

Academic Session

The academic session for this loan period.

Academic Year

The academic year for this loan period.

Percentage

The percentage of approved loan amount to apply to this session.

Round/Truncate

The code defining the action to perform on calculated amount, i.e., R(ound) or T(runcate).

Display in Lookup

A Y(es)/N(o) code indicating whether this entry should appear in a lookup window. Set only one “Y” entry per loan period.

Setup Issues

You may have multiple disbursement policies in effect at one time. Enter all possible loan disbursement policies in this table.

You must maintain this table each year to define the different loan periods, based on the sessions and session combinations for which you process loans.

Setting up the Aid Table

The Aid table (aid_table) defines the various aid program codes such as PELL, SEOG, Federal Work-Study Program (FWSP), and Stafford Loans.

The Loan Tracking field indicates if the aid code can be tracked in loan tracking. The PLUS Loan Exception field indicates if the aid code is an exception to PLUS loans and determines whether edit checks will be run against the PLUS loans in loan tracking.

Note You should never use an aid code in the Loan Module that has been used for something else because it will cause problems in the Financial Aid award history that exists in your system.

Setting up the Lender Table

The Lender table (lender_table) is relevant only to a CommonLine implementation. Use this table to define valid lenders for the loan tracking module, along with their origination fees. In this table you also define whether the lender accepts electronic transfers. You will need an entry for Direct Lending; use COD as the lender code.

When you enter the loan amount and the lender in Loan Tracking Entry, the system looks at this table to determine the actual disbursement amount. To calculate the actual disbursement amount, the system will identify any fees defined in this table for the lender and deduct them from the loan amount.

The following fields are available in this table.

Alternate Orig. Fee*

The percentage charged by this lender for Alternate loans.

Electronic Transfer

A Y(es)/N(o) flag that indicates whether this lender supports Electronic Funds Transfer (EFT).

Lender Code

The lender code.

Lender ID

The CX ID for this lender.

Lender Name

The name of the lender.

PLUS Orig Fee*

The percentage charged by this lender for PLUS loans.

STAF/UNSB Orig Fee*

The percentage charged by this lender for STAF loans.

*Can be replaced by entries in the Decision Table with the Type of FEEPCTS.

Setup Issues

You may want to include a blank entry for unknown lenders. For CommonLine processing, the Lender code is imported from the Response file if the loan record has a blank value for the Lender.

Loan Guarantor Table

The Loan Guarantor table (loanguar_table) is relevant only to a CommonLine implementation. It defines valid codes for the guarantor agencies used by your institution. Periodically, you may begin using a guarantor not previously used; therefore, you must modify this table appropriately.

The following fields are available in this table.

Loan Guarantor Code

The code for this loan guarantor.

Description

Name of the loan guarantor.

Guarantor ID

The three-digit Guarantor Agency ID (assigned by CommonLine).

Guarantor State

The state in which this guarantor operates.

Setup Issues

The loan database is distributed by Jenzabar with all possible FFELP guarantors. You should review all of the entries in this table and delete entries for agencies that are not used by your institution. If you have used a guarantor in the past or intend to use one in the future, do not delete that entry.

CommonLine assigns a guarantor ID to every guarantor. By default, the CommonLine Guarantor ID is displayed as the Loan Guarantor Code. However, most Jenzabar clients refer to guarantors by a sequence of characters such as USAF for SA Funds (whose Guarantor ID is 800). You must determine which value you will use as the Loan Guarantor Code and make changes accordingly.

CX-Maintained Tables

The following loan-tracking tables contain data supplied and maintained by Jenzabar in the CX system.

- Loan Format table (loanfmt_table)
- Grade Level table (gradelvl_table)
- Loan Maximum table (loanmax_table)
- Loan Origination table (loanorig_table)
- Record Type table (loanrec_table)
- Loan Status table (loanstat_table)
- Disbursement Status table (disbstat_table)
- Loan Type table (loantype_table)

While these tables are updated by Jenzabar via annual SMOs, it is expected that you may need to modify the Loan Format table during implementation of the loan module. You should review each of the other tables to verify the data and make modifications only when fields are unique to your institution.

Setting Up the autocreation Feature in Financial Aid Loan

Financial Aid Loan can minimize the Financial Aid office's manual data entry. When set up as directed, the autocreation feature in Financial Aid Loan creates the loan and disbursement records automatically whenever an aid type that is a loan is entered for a student in Financial Aid Entry.

Setup Steps

The following steps are required to set up the autocreation feature:

- Define Configuration table values
- Define Decision table values
- Update the Aid table
- Populate the Loan Period table

Note For more information about the values for this table, see *Setting Up the Loan Period Table* in this manual.

Configuration Table Entries for the Loan Autocreation Feature

To support the autocreation feature in Financial Aid Loan, you must modify the following Financial Aid Loan Configuration table entries as they apply to your institution. Each exists under the Product name FINAID.

ENABLE_MOD_LOAN_TRACKING

Activates the loan tracking module in which autocreation occurs.

COD_DESTINATION

Its value must be 000000001 (9 digits).

COD_LOAN_REPORTING_SCHOOL_ID

An ID assigned by the Department of Education.

COD_REPORTING_SCHOOL_ID

An ID assigned by the Department of Education.

Decision Table Changes for the Autocreation Feature

The following codes must be in the Decision tables for the FALOAN decision type. These values are used to select default data on a student-by-student basis. For more information about setting up Decision tables, see *Building the Decision Tables* in this section.

Description	Decision Code	Example	Field in database
Alternative Disbursement Status	ADSBSTAT	E	loandisb_rec.stat
Additional Unsub Indicator	ADTLUNSB	N	loan_rec.adtl_unsb
Alternative Processing Type Code	ALLOANTP	PG	loan_rec.req_type
Alternative Loan Status	ALNSTAT	E	loan_rec.stat
Attending School Entity Identification	ATTENDSC	99999999	loan_rec.sch_id
Direct Loan Release Indicator (default value)	DFRELIND	N	loandisb_rec.rel_indicator
Disclosure Statement Print Code	DISCLPR	Y	loan_rec.discl_stm
Direct Lending School Code	DLSCHCD	G99999	Used to create unique loan ID number
Student Classification	FACCLASS	FF	Compared to gradlvl_table.cl for disb_date or hold30_date
Anticipated Graduation Date	GRADDATE	05012012	loan_rec.grad_date
Grade Level Code	GRADELVL	01	loan_rec.gradlvl
Guarantor ID	GUAR	800	loan_rec.loanguar
Hold Release Indicator	HOLDREL	Y	loandisb_rec.hold_release
Lender ID	LENDER	123456	loan_rec.lender
Loan MPN Delivery Method	MPNDEL	P	loan_rec.mpn_deliv
PLUS Disbursement Status	PDSBSTAT	E	loandisb_rec.stat
PLUS Processing Type Code	PLLOANTP	GP	loan_rec.req_type
PLUS Loan Status	PLNSTAT	E	loan_rec.stat
PLUS Promissory Note Print Indicator	PLPROM	O	loan_rec.prom_note_del
Pre-professional Coursework Indicator	PROFCSWK	N	loan_rec.prof_crswork
Promissory Note Print Code	PROMPRNT	Y	loan_rec.prom_note_printed
Direct Loan Release Indicator	RELIND	Y	loandisb_rec.rel_indicator
Stafford Disbursement Status	SDSBSTAT	E	loandisb_rec.stat
Loan MPN Serial Loan Code	SERIAL	S	loan_rec.mpn
Stafford Processing Type Code	SFLOANTP	PG	loan_rec.req_type
Stafford Promissory Note Print Ind	SFPROM	S	loan_rec.prom_note_del
Stafford Loan Status	SLNSTAT	E	loan_rec.stat
Unsubsidized Disbursement Status	UDSBSTAT	E	loandisb_rec.stat
Unsubsidized Loan Status	ULNSTAT	E	loan_rec.stat

Aid Table Changes for the autocreation Feature

The following changes to the existing Aid table entries are required to implement the autocreation feature.

- For the DSL Loan Type field, the value must match a loan type in the Loan Type table. The CommonLine Stafford loan has a DSL Loan Type of 01. For COD Direct Lending, the DSL Loan type should map to the type of loan (i.e., P for PLUS loans, S for Subsidized Stafford loans, and U for Unsubsidized Stafford loans).
- For the Combo Loan Type field, if the CommonLine Stafford loan is to be a Combination loan, this value should be set to 07. If it is not a Combination loan, leave this field blank.
- For the Loan Origination field, this should be the appropriate originator for the DSL/Combo Loan Type fields. For example, for COD Direct Lending, this field should be “COD,” or, if it is CommonLine Stafford, this field should be “Common.” If this field is left blank, LOAN_DEFAULT_LOANORIG from the Configuration Table will be used instead.

Installing Financial Aid

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**
% **make reinstall F="fy" >& make.out**
4. Access the \$CARSPATH/include/util directory and enter the following:
% **make reinstall F="fa[01]" >& make.out**
% **make reinstall F="facalc" >& make.out**
5. Access the \$CARSPATH/src/Libapp directory and enter the following:
% **make REINSTALL F=ALL >& make.out**
6. Access the \$CARSPATH/src/Lib/libbill directory and enter the following:
% **make REINSTALL F=ALL >& make.out**
7. Access the \$CARSPATH/src/finaid directory and enter the following:
% **make REINSTALL F=ALL >& make.out**
8. Access the \$CARSPATH/src/regist/regent directory and enter the following:
% **make REINSTALL F=ALL >& make.out**
9. Access the \$CARSPATH/modules/finaid directory and enter the following:
% **make reinstall F=ALL >& make.out**
10. Access the \$CARSPATH/menuopt/finaid directory and enter the following:
% **make reinstall F=ALL >& make.out**
11. Access the \$CARSPATH/menusrc/student/finaid directory and enter the following:
% **make subs T=reinstall >& make.out**

Building the Decision Tables

The process controlling decision testing in Financial Aid uses the following Financial Aid tables:

- Decision table (fadec_table)
- Decision Results table (fadecres_table)
- Decision Criteria table (fadeccrit_table)

These three closely related tables must be completed in association with each other.

Note If you are using packaging, you may also need to update the Aid Package Criteria table to refer to the correct Decision codes.

Access

You access the Decision tables by selecting Decision Code from the Financial Aid: Table Maintenance: Decision Table menu.

What is the Decision Processor?

The decision processor allows users to set up the CX financial aid product to make decisions determining:

- What type of budget a student will be assigned, in any of the following types:
 - Budget Group Decision (BGTGRP)
 - Budget Code Decision (BGTCODE)
 - Budget Item Decision (FAITEM)
 - Budget Duration (FABGTDUR)
 - FALOAN – Defines values to create loan records automatically
 - GRANT – Defines default values for ACG and SMART grant records
 - FEEPCTS – Defines any number of fees to apply to loans for estimating the net loan amount
- The maximum eligibility for a student and given award, using the maximum packaging amount (MAXPKGAM)
- The type of packaging method to use for a student, using the packaging group code (PKGGRP)
- Default values for fields in a loan application for Loan Autocreation (FALOAN)
- Default values for fields in a US Dept of Ed grant (GRANT)

Impact of the Decision Processor Feature

After you perform financial aid budgeting, the budgeted amounts assigned from the decision tables appear automatically on the Financial Aid Need screens.

CX Standard Product

As part of the standard CX product, your Decision tables are populated for Stafford subsidized and unsubsidized loans. Use these table values as a guide to completing the Decision tables for other types of awards, budgets, and packages you may want to define.

To provide schools with more flexibility for defining criteria in Decisions, such as additional tables and more complex comparisons, the decision processor can call stored procedures. This is done in a way similar to how stored procedures are used in Compliance Criteria; however, in Decision Criteria, the File is set to PROC, and the procedure's name is entered in the Column. For more information about stored procedures, see *Stored Procedures in Compliance* in this manual.

Decision Table

The following fields in the Decision table must be completed in the order given. The table decision requires an aid code, an aid funding code, or all financial aid

codes. The aid funding code allows the same decision requirements to be used on every aid from the funding source. This is useful for state or federally funded awards that have the same overall decision requirements for each aid.

Decision Code

A code to identify the decision.

Priority

Indicates the sort priority for the decision processor to apply.

Award Year

Financial award year (i.e., 1112).

Def Amount

Indicates the amount that should be defaulted based on this decision, if applicable.

Type

Identifies the type of decision this decision code applies to.

Def Code

Indicates the result code that should be defaulted based on this decision, if applicable.

Def Sess

Indicates the result session that should be defaulted based on this decision, if applicable.

Def Year

Indicates the result year that should be defaulted based on this decision, if applicable.

Decision Result Table

The Decision Results table defines the results that a student will get if they pass the criteria. The following fields in the table are shown in the order in which you complete them.

Result Code

The code that will be assigned if the student passes the criteria.

Priority

The sort priority for the decision processor. If a student passes criteria for more than one result, the result with the highest priority (lowest Priority number according to this field) will be assigned to the student.

Dec Assignment

The associated decision code.

Method

The budget method used for the budget assignment.

Amount

The award or budget amount that should be defaulted based on this decision.

Level

The enrollment level to use if your institution is using the Automatic Recalculation feature.

Session

The academic session in which to find the student information against which to test the criteria.

Year

The calendar year in which to find the student information against which to test the criteria.

Decision Criteria Table

The Decision Criteria table defines the decision test criteria used to verify whether a student completes the decision requirements for a financial aid. The following fields in the table appear in the order in which you complete them.

Sequence

The order in which the criteria are processed.

File

A file code identifying the database record from which student data is to be evaluated by the Decision Processor. The valid file codes are:

File Code	Database File	Session Value	Year Value
ACAD	stu_acad_rec	Yes	Yes
ACSU	acadsum_rec	Yes	Yes
ADM	adm_rec	Yes	0
AID	aid_rec	Yes	Yes
CTC	ctc_rec	YEAR/Yes	0/Yes
ID	id_rec	YEAR	0
NAF	naf_rec, naf1112_rec	YEAR	0
NEED	faneed_rec	YEAR	0
NSLD	nslds_rec, nslds1112_rec	YEAR	0
PENR	prog_enr_rec	YEAR	0
PROC	stored procedure	YEAR	0
PROF	profile_rec	YEAR	0
SAP	sap_rec	Most current	
SERV	stu_serv_rec	YES	Yes
STAT	stu_stat_rec	YEAR	0
STSU	statsum_rec	YEAR	0
SUFA	stufa_rec	YEAR	0
TAID	aid_table	YEAR	0
TRAN	fatran_rec	YEAR	0

Column

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.

Rel Op

A relational operator used to compare the database value found with the test value. Valid values are:

Operator	Description
=	Equal to
!	Not equal to
<	Less than
>	Greater than

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, for a test on a dollar amount of \$1,000.00, enter 1000.00 into the field. Do not enter \$1,000.00.

Note that you can use wildcards (*) in this field to simplify the decision setup. For example, if you are testing for a range of ZIP codes, you could enter 4* to select all individuals whose ZIP code starts with 4.

Log Op

The connector needed to associate the next criterion in the sequence with the current one, in accordance with the following rules:

Operator	Description
AND	Both of the criteria must be true to have an outcome of True
OR	One of the criteria must be true to have an outcome of True

Decision Table Worksheets

Use the following worksheets to simplify your table setup for the Decision Processing feature. The first two worksheets are examples that include explanations of the values, and the third is a blank set for your use. For multiple table entries, make copies of the blank worksheet before you get started.

Note that the type of decision is noted in the title of every page of the worksheet. Make sure you are working with the correct pages when you define your decision criteria.

Example 1 Worksheet

The following pages contain an example of how to set up your tables for Decision Processing.

Decision Processor Result Worksheet (Example 1)

Type of Decision: BGTGRP or BGTCODE

DECISION TYPES TABLE:

Decision code: INSTATE Description: All Ohio Residents

Priority: 1 Def Code: DEFAULT (a budget code that exists in the fabgt_table)

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment (corresponds to BGTGRP in bgtgrp_table or BGTCODE field in fabgt_table)
1	RES1	Resident, FT	RESFT
2	RES2	Resident, PT	RESPT

In this case, any student who meets the criteria of RES1 (as shown on the criteria on the next page) will receive the decision code of RESFT.

Decision Processor Criteria Worksheet (Example 1)

Type of Decision: BGTGRP or BGTCODE

Result Code: RES1 Decision Assignment (from fabgt_table): RESFT

True when:

SEQ FILE.Column (=,<,>,<,>,<,>) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND
2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	NAF	res_st	=	OH	AND
2	ACAD	reg_hrs	=	12	OR
3	NAF	res_st	=	OH	AND
4	ACAD	reg_hrs	>	12	AND

This set of criteria is an example of how to use the AND/OR operators. Note that the “OR” on the second sequence effectively ends one set of linked criteria and starts another, so another way to read the criteria would be:

(an Ohio resident and 12 registered hours) or (an Ohio resident and more than 12 registered hours)

Decision Processor Result Worksheet (Example 1)

Type of Decision: FAITEM

DECISION TYPES TABLE:

Decision code: BOOKS Description: books/supplies

Priority: 1 Default: BOOK (an fabgt item code as defined in fa_item_table) Def Amt: \$300

Def Sess: FA Def Year: 2009

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment (corresponds to an fabgt item code from the fa_item_table)	
1	UBOOK	Undergrad books/supplies	BOOK	
	Amount	Level	Session	Year
	\$275	F	FA	2009
Priority	Result Code	(Description)	Decision Assignment	
2	GBOOK	Graduate books/supplies	BOOK	
	Amount	Level	Session	Year
	\$350	F	FA	2009

Important points to note here are that the “Level” is only relevant if your institution is using the Automatic Recalculation feature (the option that automatically readjusts financial aid awards should a student’s number of registered hours change). If this feature is not in use at your institution, the “Level” field will not display on your table entry screen.

Also note, this example only addresses the assignment for full-time students; additional table entries would be required for half-time, etc.

Decision Processor Criteria Worksheet (Example 1)**Type of Decision: FAITEM**Result Code: UBOOK Decision Assignment: BOOK

True when:

SEQ FILE.Column (=,<,>,:) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	PENR	prog	=	UNDG	AND

The criteria here requires a single value, UNDG, in the prog field of the Program Enrollment record.

Decision Processor Result Worksheet (Example 1)

Type of Decision: PKGGRP

DECISION TYPES TABLE:

Decision code: First Year Description: First Year students

Priority: 1 Default: UPPR (used as Package Group Code on the Packaging Parameter screen)

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment (used as a Package Group Code on the Packaging Parameter screen)
1	FIRSTIN	First year stu res instate	1IN
2	FIRSTOUT	First year stu res out of state	1OUT

If a student were able to meet the criteria for both of these Result codes (which is not possible in this case since they refer to mutually exclusive conditions), the code with a Priority of 1 (FIRSTIN) would be used, and the Decision Assignment of 1IN would be assigned to the student.

The Decision Assignments appear as Package Group Codes on the Package Parameters screen (which is part of Automated Packaging, located within Financial Aid/Student Processing/Automated Packaging).

Decision Processor Criteria Worksheet (Example 1)**Type of Decision: PKGGRP**Result Code: FIRSTIN Decision Assignment: 1IN

True when:

SEQ FILE.Column (=,<,>,:) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND2 STUF.prog = UND
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	NAF	res_st	=	OH	AND
2	ACAD	reg_hrs	<	30	AND
3	SUFA	prog	=	UNDG	AND

In this case, a student who resides in Ohio, is enrolled in the UNDG program, and who has registered hours less than 30 would receive the assignment.

Decision Processor Result Worksheet (Example 1)

Type of Decision: FABGTDUR

DECISION TYPES TABLE:

Decision code: BDGDUR Description: budget duration assignment

Priority: 1 Default Amount: 9

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment
1	5MONTHS	5-month budget duration	5
2	11MONTHS	11-month budget duration	11

Ordinarily, students receive their budget durations when they are assigned their budgets. This decision item is only used for students who have not been assigned budgets, and therefore have no durations. In this case, the special cases of the 5-month duration (for one term) and the 11-month duration (for two terms plus summer school) are set up, and the default is the most common scenario, the 9-month duration (a standard academic year).

Decision Processor Criteria Worksheet (Example 1)**Type of Decision: FABGTDUR**Result Code: 5MONTHS Decision Assignment: 5

True when:

SEQ FILE.Column (=,<,>,:) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	NAF	sess1_enr	!	5	AND
2	NAF	sess2_enr	=	5	AND
3	NAF	sess3_enr	=	5	AND
4	NAF	sess4_enr	=	5	AND

The "Value" of "5" indicates the student is not enrolled for the specified academic period (sess1-sess4). Therefore, sequence 1 here indicates that the student IS enrolled in the fall; the remaining sequences indicate that the student is NOT enrolled for the other sessions. This set of criteria qualifies the student for the duration of 5 months.

Decision Processor Result Worksheet (Example 1)**Type of Decision: MAXPKGAM****DECISION TYPES TABLE:**Decision code: STAF Description: Stafford Loan, subsidizedPriority: 1 Default Amount.: 2625**DECISION RESULTS TABLE:**

Priority	Result Code	(Description)	Decision Assignment
	GRADSTF	Graduate Stafford	\$8500
	UPPRSTF	Upperclass Stafford	\$5500
	SOPHSTF	Second year Stafford	\$3500

This example illustrates the special case of the subsidized Stafford loan. The table values are delivered with the standard CX product, but are explained here for clarity. Note, STAF is a reserved code, and it works in conjunction with UNSB, the reserved code for unsubsidized Stafford loans.

In this case, three different scenarios in addition to the default are defined; the default will be used for first year students who are eligible for \$2625 in loans.

Decision Processor Criteria Worksheet (Example 1)

Type of Decision: MAXPKGAM

Result Code: GRADSTF Decision Assignment: \$8500

True when:

SEQ FILE.Column (=,<,>,:) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND
2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	SUFA	prog	=	GRAD	AND
2	ACAD	cum_att_hrs	>	30	AND
3	ACAD	cum_att_hrs	<	60.1	AND

In this example, a Graduate Stafford loan result will be assigned if the student is in a GRAD program and has between 30 and 60 cumulative hours.

Decision Example 2 Assumptions

For the second example of Decision table setup, the basis for the decisions are:

Assume four budgets are in use at your institution:

- Full-time, Ohio resident (FULLOHIO)
- Full-time, non Ohio resident (FULLNON)
- Less than full time, Ohio resident (LESSOHIO)
- Less than full time, non Ohio resident (LESSNON)

Of these budgets, assume FULLOHIO is the default. The others are prioritized as follows:

- LESSOHIO
- FULLNON

- LESSNON

For the decision processor, these codes become the **result assignments**.

Furthermore, assume your institution charges a “real life awareness fee” (RLA) for the dependent students.

You intend to assign budgets to students based both on the enrollment level reported on the FAFSA and the state of residency, and to give the dependent students the RLA fee.

Note that it would be possible to create four more budgets identical to the four named above except for the addition of the RLA fee, but it is simpler to use this set of assumptions.

Example 2 Decisions

You can use the decision processor to assign budgets. The decision processor will allow you to make decisions about budget groups, budget codes, budget items, and budget durations. In this scenario, assume the MULTIPKG/RECALC feature is not in use, so you want to assign budget codes to students as well as to assign a budget item for the RLA fee. Therefore you have two decisions to make: a budget code decision (BGTCODE) and a (FAITEM) decision.

Example 2 Strategy

Your first strategic decision is whether you want to have a default or most common budget.

If you do, you want to assign the default at the decision level. Assume for this illustration that FULLOHIO is the default budget.

If you do not, you must allow for all possible criteria when you assign the budgets.

The default budget will be assigned to the student if the student does NOT meet any of the criteria you set up.

Once you have set a default, you are ready to assign the other budget codes. You typically sort them in priority order from the most easily assigned budget to the most difficult.

Making the Example 2 Budget Decision

In this example, you must determine what supports a decision to give a student a LESSOHIO budget.

Full time for the FALL term means a value of “1” appears in the “Fall 2009 Enrollment” field on the need form screen. This value is stored in the naf_rec sess2_enr field.

Therefore, to be LESS than full time, the naf_rec sess2_enr field must contain anything but “1”.

To be an Ohio resident, the “State of Legal Residence” field on the need form screen must be “OH”.

Therefore, if the “fall 2009 enrollment” Not equal to “1” AND the “State of Legal Residence” = “OH”, the student will be assigned a LESSOHIO budget.

You must repeat the decision process for FULLNON and LESSNON.

Making the Example 2 Budget Item Decision

Next, you must determine how you want the decision processor to give a student the RLA budget item. In this scenario, if the dependency status (faneed_rec.dep field) is “D” for the student, they are assessed a \$400 RLA fee in the fall session (FA) only. If not, the student is not charged the fee. In other words, for Fall 2010, you want to charge the student a RLA FEE of \$400 if the dependency status is “D”.

Making the Maximum Packaging Amount (MAXPKGAM) Decision

If you want the packaging program to package different amounts based on student data (e.g., GPA, need, grade level, or resident state), you can use a decision instead of a recommended amount on the packaging table setup screen.

To do so, use a decision and run the decision processor to assign the package group to students. Automated packaging can then be used to assign packages in a batch mode.

Example 2 Worksheet

The following pages contain an example of how to set up your tables for the second example.

Decision Processor Result Worksheet (Example 2)

Type of Decision: BGTCODE

DECISION TYPES TABLE:

Decision code: ANYNAME Description: Any name to link decision tables together

Priority: 1 Def Code: FULLOHIO (a budget code that exists in the fabgt_table)

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment (corresponds to BGTGRP or BGTCODE field in fabgt_table)
1	RES1	Result 1	LESSOHIO
2	RES2	Result 2	FULLNON
3	RES3	Result 3	LESSNON

In this case, any student who meets the criteria of RES1 (as shown on the criteria on the next page) will receive the decision code of LESSOHIO. Students who do not meet any of the criteria for the three specified results will receive the default decision code of FULLOHIO. The default is usually the most common decision.

Decision Processor Criteria Worksheet (Example 2)

Type of Decision: BGTGRP or BGTCODE

Result Code: RES1 Decision Assignment (from fabgt_table): LESSOHIO

True when:

SEQ FILE.Column (=,<,>,!) value (AND,
OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND
2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	NAF	Sess2_enr	!	1	AND
2	NAF	Res_st	=	OH	AND

This set of criteria shows that the Sess2_enr value in the naf_rec or naf1112_rec must not be 1 (1 is the value for fulltime students) and the res_st value must be OH (for Ohio residency) to qualify for the decision code of LESSOHIO. Similar criteria must be set up for FULLNON and LESSNON using the equal to (=) or not equal to (!) operators as required (shown on the next two pages).

Decision Processor Criteria Worksheet (Example 2)

Type of Decision: BGTCODE

Result Code: RES2 Decision Assignment (from fabgt_table): FULLNON

True when:

SEQ FILE.Column (=,<,>,!) value (AND,
OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND
2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	NAF	Sess2_enr	=	1	AND
2	NAF	Res_st	!	OH	AND

Decision Processor Criteria Worksheet (Example 2)**Type of Decision: BGTCODE**Result Code: RES3 Decision Assignment (from fabgt_table): LESSNON

True when:

SEQ FILE.Column (=,<,>,:) value (AND,
OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND
2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op
1	NAF	Sess2_enr	!	1	AND
2	NAF	Res_st	!	OH	AND

Decision Processor Result Worksheet (Example 2)

Type of Decision: FAITEM

DECISION TYPES TABLE:

Decision code: ANYITEM Description: For other exceptional items

Priority: 1 Default: (an fabgt item code as defined in fa_item_table)

Def Amt: \$300

Def Sess: FA Def Year: 2009

DECISION RESULTS TABLE:

Priority	Result Code	(Description)		Decision Assignment
1	IRES1	Result 1		RLA
	Amount	Level	Session	Year
	\$400	F	FA	2009

Important points to note here are that the “Level” is only relevant if your institution is using the Automatic Recalculation feature (the option that automatically readjusts financial aid awards should a student’s number of registered hours change). If this feature is not in use at your institution, the “Level” field will not display on your table entry screen.

Also note, this example only addresses the assignment for full-time students; additional table entries would be required for half-time, etc.

Blank Worksheet

The following pages contain a blank worksheet to help you set up your Decision Processing tables.

Decision Processor Result Worksheet

Type of Decision: BGTGRP or BGTCODE

DECISION TABLE:

Decision code: _____

Description: _____

Priority: _____ Default: _____ (a budget code in the fabgt_table)

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment (corresponds to BGTGRP in bgtgrp_table or BGTCODE field in fabgt_table)

Decision Processor Criteria Worksheet

Type of Decision: BGTGRP or BGTCODE

Result Code: _____ Decision

Assignment: _____

True when:

SEQ FILE.Column (=,<,>,!) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND

2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op

Decision Processor Result Worksheet**Type of Decision: FAITEM****DECISION TABLE:**

Decision code: _____

Description: _____

Priority: _____ Default: _____ (an fabgt item code in fa_item_table)

Def Amt: _____

Def Sess: _____ Def Year: _____

DECISION RESULTS TABLE:

Priority	Result Code	(Description)		Decision Assignment (corresponds to an fabgt item code from the fa_item_table)
	Amount	Level	Session	Year
Priority	Result Code	(Description)		Decision Assignment (corresponds to an fabgt item code from the fa_item_table)
	Amount	Level	Session	Year

Decision Processor Criteria Worksheet

Type of Decision: FAITEM

Result Code: _____ Decision

Assignment: _____

True when:

SEQ FILE.Column (=,<,>,!) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND

2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op

Decision Processor Result Worksheet**Type of Decision: PKGGRP****DECISION TABLE:**

Decision code: _____

Description: _____

Priority: _____ Default: _____ (Pkg Grp Code on Pkg Param Screen)

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment (used as a Package Group Code on the Packaging Parameter screen)

Decision Processor Criteria Worksheet

Type of Decision: PKGGRP

Result Code: _____ Decision

Assignment: _____

True when:

SEQ FILE.Column (=,<,>,!) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND

2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op

Decision Processor Result Worksheet**Type of Decision: FABGTDUR****DECISION TABLE:**

Decision code: _____

Description: _____

Priority: _____ Default: _____

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment

Decision Processor Criteria Worksheet

Type of Decision: FABGTDUR

Result Code: _____ Decision

Assignment: _____

True when:

SEQ FILE.Column (=,<,>,!) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND

2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op

Decision Processor Result Worksheet**Type of Decision: MAXPKGAM****DECISION TABLE:**

Decision code: _____

Description: _____

Priority: _____ Default: _____

DECISION RESULTS TABLE:

Priority	Result Code	(Description)	Decision Assignment

Decision Processor Criteria Worksheet

Type of Decision: MAXPKGAM

Result Code: _____ Decision

Assignment: _____

True when:

SEQ FILE.Column (=,<,>,!) value (AND, OR next criteria)

Ex:

1 NAF.res_st = OH,RI,PA
AND

2 STUF.prog = UNDG
AND

Seq.	File	Column	Rel. Op.	Value	Log. Op



Macros and Includes

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

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. The include files are then 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

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
- COD codes

student

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

- Document tracking
- EDE
- COD codes
- 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**.
8. The system places the *applocate.out* file 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(es) or N(o), appears in single quotes following the macro name.

ENABLE_COD_XML,'Y'

Enables the COD menu. The macro defines whether this menu appears on the Financial Aid: Student Processing menu and enables users to use direct XML processing for exporting Pell COD. The macro's default setting is Y:

Access: \$CARSPATH/macros/custom/student

ENABLE_EDE,'Y'

Enables the Financial Aid Office to Participate in EDE. The macro defines whether 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 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 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 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 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 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 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 (ltrstatctc script)

If you set the macro to N, the Create Status Letters option (ltrfastat 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 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 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 (natp1213) and faneed. The macro defines whether 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 (naf0809_rec, ...naf1213_rec), and faneed_rec. This trigger creates audit records in an audit database, which you must create. The macro also defines whether 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 (typically, for example, full-time, three-quarter-time, half-time). The system creates addtl_recs, and when a package is installed, the system creates multiple award amounts, used to recalculate the award online real-time. The macro defines whether 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, addtl_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.

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 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 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 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 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_CRM_STUDENT, `N`

Defines whether to enable CRM Student and all its components.

Access: \$CARSPATH/macros/custom/configure

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 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 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 to set up the Financial Aid College Work Study feature.

Access: \$CARSPATH/macros/custom/configure

Periodic Macros

The Financial Aid periodic macros control the dates that can be selected as parameters, and also the dates that serve as defaults. They are located in the periodic file in the \$CARSPATH/macros/custom directory.

The following macros are relevant to Financial Aid:

Academic Calendar type

This macro defines the default type of Academic Calendar used on the Pell table maintenance screen:

- PELL_ACADCAL, '3'

Note

- 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, '1011'

- FA_YR_CUR, `1112'
- FA_YR_NEXT, `1213'

Sessions in sequence

This macro defines the order in which sessions exist on your campus:

- SESSYR_OTH, `PREV, FA09, WI10, SP10, SU10, FA10, WI11, SP11, SU11, FA11, WI12, SP12, SU12, FA12'

Financial Aid session order

This macro defines Financial Aid Session Order (you can enter up to four sessions, but do not comma-separate them):

- FA_SESS_ORDER, `FA11 SP12'

Financial Aid Tickler codes

These macros define Financial Aid Tickler codes:

- FA_TICK_DEF, `FY11'
- FA_TICK_VALID, `FY01,FY02,FY03,FY04,FY05,FY06,FY07,FY08, FY09, FY10, FY11, FY12'
- FA_TICK_INCL, `include=(FA_TICK_VALID), upshift')
- FA_TICK_NEXT, `FY12'

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""`

IPEDS reporting

These macros define values for IPEDS reports:

- FA_IPEDS_TYPE_VALID, `FG, SG, IG, FL, OL, FW, OW, " ""`
- FA_IPEDS_PUBLIC_INST, `N`
- FA_IPEDS_DISTRICT_FIELD, `prog_enr_rec.cl`
- FA_IPEDS_IN_DIST_VALUES, `123`
- FA_IPEDS_OUT_DIST_VALUES, `234, 345, 456`
- FA_IPEDS_OUT_ST_VALUES, `999`

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

The Financial Aid product contains includes that determine the features that are enabled in the product. An include can be either 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 *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 Technical Reference*.

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.

fa02-03 and fa0405-1213

Contains includes for the header file Financial Need Analysis calculation engine for all financial aid years beginning with 1997 – 1998. Note that the naming convention changed for the financial aid year 0405 to indicate the appropriate academic/financial aid years, which span across calendar years.

facalc

Contains includes that contain common financial aid calculation library definitions.

facomm

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



Config Table Entries

Although most Financial Aid features and processes rely on macros, some access the Configuration table for processing instructions. This section contains descriptions of the Configuration table entries that the Financial Aid 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.

Entries for Financial Aid

COD_DISB_RELEASE_AID_STATES 'A,C,I,P'

These states determine whether a Pell award can be released.

COD_DISB_RELEASE_AMOUNT_STATES 'AA,AP,AD'

These states determine the amount of a Pell award that can be released.

CTC_FAEDIT_CORR_ID

The name of the default correspondence ID for contacts created automatically based on comment codes and rejects in students' ISIR records.

CTC_FAEDIT_METHODS_ALLOWED

Limits the automatic creation of contact records related to ISIR records based on the method by which the faedit_rec rows were inserted.

ENABLE_WEB_AUTO_SYNC, 'N'

This macro attempts to sync awards when the student submits his or her choices.

ENABLE_TEMP_PKG_DATA, 'N'

Enables a feature that saves intermediate award amounts for packaging processes into temporary tables. These amounts can then be used by stored procedures for calculating maximum award amounts.

ENABLE_PARTIAL_AID_RECORDS 'N'

This allows users to define disbursing any award in parts smaller than the session, and to automatically create the parts from the Partial Aid Table.

SAP_UNAWARDED_ACAD_STAT_LIST

When selecting students for SAP compliance that have not been awarded financial aid, this comma-separated list shows the academic states to include from prog_enr_rec. Set to ALL to process all unawarded students regardless of academic status.

WEB_ACCEPT_AID_STATES, 'I, P, A, R'

These are the allowed states for students to accept or decline an award. This entry could also read 'All.' A list of all valid aid status codes appears in Section 2 of the Financial Aid User Guide, under "Financial Aid Entry Screen." See the "Ad" field.

WEB_ACCEPT_AMOUNT_STATES, 'EA'

These are the allowed states for aid amount states. This entry could also read 'All.' A list of all valid amount status codes appears in Section 2 of the Financial Aid User Guide, under "Financial Aid Entry Screen." See the "Am" field.

WEB_ACCEPT_PACKAGE_STATES, 'I, P'

These are the allowed states for package states. This entry could also read 'All.' A list of all valid package status codes appears in Section 2 of the Financial Aid User Guide, under "Financial Aid Entry Screen." See the "Pkg" field.

WEB_ACCEPT_SET_PKG_STATE

Defines the target package state when a student has made a choice on all awards. When set to a non-blank value, the `stufa_rec.pkg_stat` will update to this state when processing the Award Choices for a student. If all of the student's awards have a choice recorded in `aidchoice_rec`, the state changes.

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_COD_ADVANCE_PAY

Enables the COD Advance Pay menu. For schools enrolled in the Advance Pay program, the loan disbursements can release seven days before the Expected Disbursement Date if this value is set to 'Y' (the default setting).

Note Most schools are not Advance Pay and will receive errors on files exported to COD when attempting to release loan disbursements early. Set this configuration value **ONLY** if your school is definitely an Advance Pay participant.

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, access to the Financial Aid Loan screens is also display only.

FINAID_EMAIL_AA_CODE

This code may be used in the Export COD Batch process. When the student email address source is set to `aa_rec.line1` instead of the default `naf_rec.stu_email` (or `naf0809_rec.stu_email`, ...`naf1213_rec.stu_email`), the Alternate Address record matching the Configuration table's `FINAID_EMAIL_AA_CODE` will be used. (This configuration entry works when the macro `LOAN_EMAIL_PREFER_AA` is set to Y.)

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, PLUSFA09. The ctc_rec.tick is set to "FY" + aid_rec.fa_yr [1, 2]. For example, FY09.

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_EMAIL_PREFER_AA

When set to Y, this macro causes the Export COD Batch process to use aa_rec first instead of naf_rec, naf0809_rec, ...naf1213_rec when copying the email address of a student or parent into the loan record for later export. (The exact aa_rec to copy from is determined by the Configuration value FINAID_EMAIL_AA_CODE, also used by the COD process.)

LOAN_GRAD_PLUS_TOT_CODES

Identifies the list of Tot codes for Graduate Student PLUS loans.

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(mail)
- P(aper)
- W(eb)

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(ew) – use a new Master Promissory Note
- S(erial) – 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 either set this macro to the most common value used by your institution or 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).

COD_EXPORT_STUDENT_LIMIT

Limits the number of student records exported during any single COD exporting process. The default value is 2500.

ENABLE_EDEXPRESS_WORKAROUND

Limits the number of student records exported during any single COD exporting process. The default value is 2500.

LOAN_TRIAL_RUN_PREFIX

This prefix is used on any exported files during a “trial run.” That is, the export is run, but no database updates are performed. This allows the user to see the results of an export without changing the state of the system. By placing a prefix in front of exported files, the “trial run” cannot be confused with an actual export, and it allows the user to check the output.



Reports

This section provides reference information on the following features of the Financial Aid product:

- ACE reports
- Letters

The features detailed in this section are located in the following directory paths:

ACE reports:

\$CARSPATH/modules/finaid/:

- reports
- others

Financial Aid ACE Reports

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
- COD
- 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/aidrfnd

Transactions/Paid By Code

Lists all transactions for each student who has received Financial Aid for a certain period.

File: \$CARSPATH/modules/finaid/reports/codfatottr

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/prstulldgr

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

Gainful Employment Reports

The following lists the reports accessed from the Reports: Gainful Employment Reports menu.

GE Report

Report to view the Gainful Employment Financial Aid information.

File: \$CARSPATH/modules/finaid/reports/gainfulemp

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

Contacts/Deleted ISIR Edits

Prints contacts created automatically from ISIR edit codes where those codes are no longer present, likely because the Edit codes records have subsequently been deleted.

File: \$CARSPATH/modules/finaid/reports/ctcfaedit

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/sturfnd

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

COD Reports

The following reports appear on the Financial Aid COD Reports menu.

Pell Report

Lists data in the Pell records. Use this report to verify the accuracy of the information in the Pell records (edepell_rec) and the Pell Disbursement records (pelldisb_rec).

File: \$CARSPATH/modules/finaid/reports/rfms

Pell Exceptions Report

Lists data in the Pell disbursement records. 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

ACG/SMART Grant Report

Lists data in the ACG/SMART/TEACH grant records. Use this report to verify the accuracy of the information in the Grant records (grant_rec) and the Disbursement records (pelldisb_rec).

File: \$CARSPATH/modules/finaid/reports/codgrant

Xml Batch Report

Lists the XML Batches exported and imported with COD. Use this report to view details on a range of batches (faxmlbch_rec).

File: \$CARSPATH/modules/finaid/reports/faxmlbch

COD Student Batch Report

Lists the students included in XML Batches exported and imported with COD. Use this report to view details on a students in the batches (fastubch_rec).

File: \$CARSPATH/modules/finaid/reports/fastubch

COD Pell Reconciliation

Lists the data in one student's grant records (Pell, ACG, SMART, or TEACH) exported and imported with COD. Use this report to view the history of a student's records (pellhist_rec, granthist_rec, pelldisbhist_rec).

File: \$CARSPATH/modules/finaid/reports/pellhist

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, natp0809_rec, ...natp1213_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/dishRoster

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-03fedtp, 0405fedtp

Defines the format for the tape received from the Federal government. *Tpcnvt* uses the report to place the values in the natp_rec.

93gesesar-03gesesar, 0405gesesar-1213gesesar

Defines the format for the tape received from the Federal government (GES). *Tpcnvt* uses the report to place the values in the natp_rec or natp1213_rec.

01pheatp-03pheatp, 0405pheatp-0506pheatp

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

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 they are 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.



Maintenance

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.

The Financial Aid product also provides SQL scripts for maintaining the Financial Aid tables. See *Table Maintenance* in this section for more information.

Maintenance

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/naf0809, ...naf1213
- student/esar0809, ...esar1213
- student/natp0809, ...natp1213
- 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.

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 finaaid 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:
 - esar0809_rec, ...esar1213_rec
 - naf0809_rec, ...naf1213_rec
 - natp0809_rec, ...natp1213_rec
 - falooan_rec
 - fatran_rec
 - stufa_rec
 - stufa_blob
 - fana_recf
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 falooan_rec.falooan_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 pcfina home directory: eaps99in.dat and corr99in.dat.

Scripts for Copying Tables

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.

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

addtfameth

Copies Need Analysis Methodology entries

addtpkg

Copies Packaging entries

adtfabgtas

Copies Budget Association entries

addtfaver

Copies Verification entries

addtaiddtl

Copies enrollment level entries

addctc

Copies student contact and tickler records

addtctc

Copies contact, tickler, and contact-to-edit-code table entries

addtfadec

Copies Decision Processor entries

addtedepell

Copies Pell grant and disbursement table entries

addloandisb

Copies Loan Disbursement table entries

addloanprd

Copies Loan Period table entries

cptprtlaid

Copies Partial Aid Detail table entries



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