



Financial Aid

Technical Reference

Programs and Operations

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How to Use This Manual

This manual provides technical information required for operations and reference of the CX Module Name product of CX. Use it in conjunction with the corresponding Technical Implementation manual, which also documents the conventions used in this manual.

If you are not familiar with the processes and features of the Financial Aid product, read the manual for detailed reference information about how the product works.

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.

Intended Audience

This manual is for use by those individuals responsible for the operation and maintenance of CX.

Product Differences

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



Processes

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

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

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

Background Knowledge

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

UNIX

Know the following about the UNIX operating system:

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

INFORMIX-SQL

Know about the following INFORMIX tools:

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

Jenzabar CX database tools and utilities

Know how to use the following database tools:

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

Jenzabar CX

Know the following about the CX standard product:

- CX directory structure

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

QuickMate features

Know the following about the CX Graphical Server:

- Client/Server processing
- Telnet settings
- Keyboard settings
- Mouse settings
- GUI mode commands

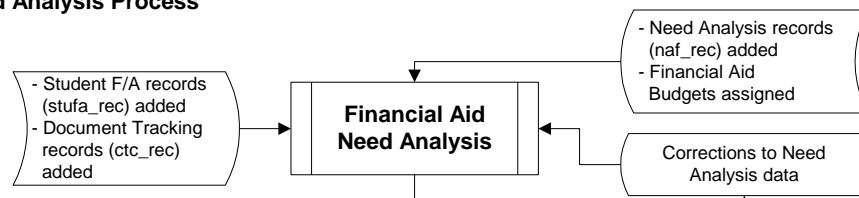
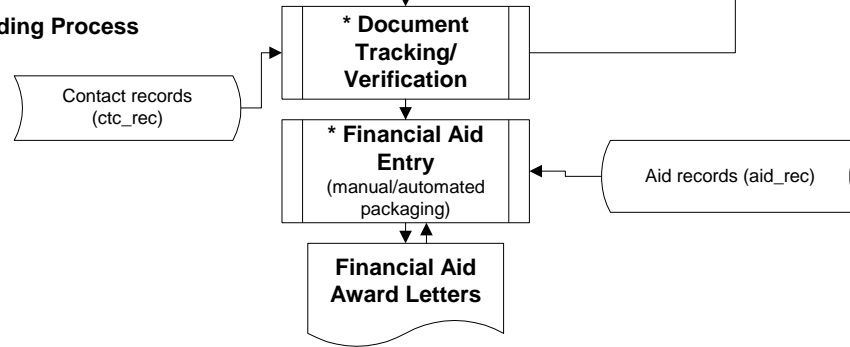
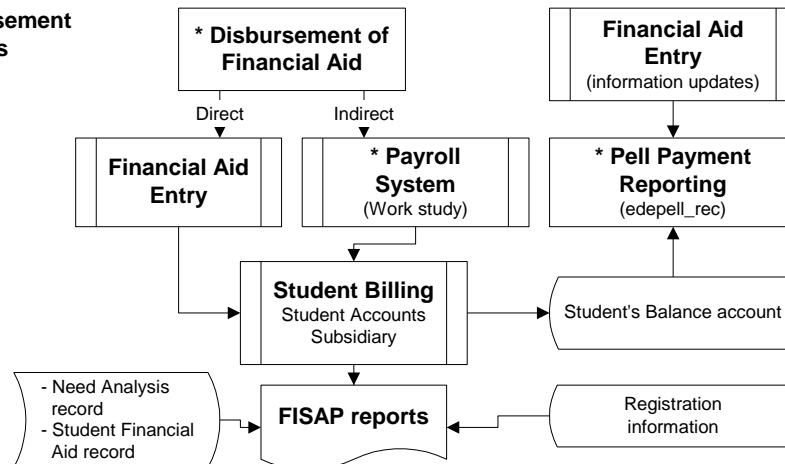
C Programming

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

Process Flow

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

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

Need Analysis Process**Awarding Process****Disbursement Process**

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

Process Description

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

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

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

1. The Financial Aid office uses the Need Analysis program to:

- Add need analysis (naf_rec, naf0809_rec, ...naf1213_rec), National Student Loan Data System data (nslds_rec, nslds0809_rec, ...nslds1213_rec), and student data (stufa_rec) from need analysis forms and EDE processing
 - Create Contacts records (ctc_rec) for tracking the institution's contacts to students
 - Assign Financial Aid budgets to students
 - Add/monitor SAP processing results
2. The Financial Aid office uses the Document Tracking/Verification programs to:
- Assist in performing verification procedures
 - Enter and schedule contacts (ctc_rec) with students
 - Produce letters and other forms of communication

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

3. The Financial Aid office uses the Financial Aid Entry (Financial Aid Packaging) program to perform manual or automated packaging of students' awards (aid_rec).

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

4. The Financial Aid office uses the Financial Aid Entry program to create:
- Financial aid award letters
 - Financial Aid transcripts
5. The Financial Aid office authorizes disbursement financial aid to students. The Bursar or Business office disburses aid directly using the Financial Aid Entry program and indirectly when the aid is in the form of a Work-Study program.

Note The Student Billing program utilizes aid posted to the student accounts subsidiary. Payroll processing handles work-study earnings. Steps in this phase can occur repeatedly during the year, outside the stated process flow.

6. The Financial Aid office creates FISAP reports based on information from the following sources:
- Student Accounts Subsidiary (Student Billing)
 - Need Analysis information (naf_rec, naf0809_rec, ...naf1213_rec)
 - National Student Loan Data System (nslds_rec, nslds0809_rec, ...nslds1213_rec)
 - National Student Loan Data System Program Code record (nsldsprog_table)
 - Students' financial aid information (stufa_rec)
 - Registration information
7. The Financial Aid office creates Pell Payment reporting information from the following sources:

- Financial Aid Entry information
- Student's Account (Student Billing)
- Financial Aid Need Analysis Information

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

Application Relationships

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

Payroll/Personnel

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

Registration

Financial Aid uses registration information to:

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

Student Billing

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

Student Affairs/Housing

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



Tables and Records

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

Alphabetical Organization

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

What is an SQL Table?

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

Columns

ID	Full name	Sess
391569012	Browning, Allan T.	FA09
345098754	Smith, Roxanne N.	FA09
591320941	Dobrowski, George S.	FA09
783490100	Jennings, Christina A.	SP10
840917892	Brown, Garrett L.	FA09
955712309	Cummings, Charles C.	SP10

Rows

What is a Jenzabar CX Table?

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

What is a Jenzabar CX Record?

CX makes name distinctions in the usage of database tables. A *record* in CX is a table that contains information that changes on a regular basis and is denoted with the *_rec* extension. For example, the Alternate Address record, named *aa_rec*, contains any other addresses at which students can be contacted, such as

a summer address. You can access records in CX program screens, scroll screens, and PERFORM screens. SQL makes no distinction between tables and records; all sets of data are tables.

Summary List of Tables and Records Used

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

- Common
- Shared
- Product-specific

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

Note Beginning with the 2008-2009 school year, some tables are created for each year's data. These are noted in a form such as the following:

esar_rec, esar0809_rec, ...esar1213_rec, etc.

In this case, the table *esar_rec* contains data for award years prior to 2008-2009, the table *esar0809_rec* contains data for the 2008-2009 award year, and tables for years after 2008-2009 are added each year using a similar naming scheme (*esar0910_rec*, *esar 1213_rec*, and so on).

Impact of Changes to Tables and Records

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

Common Tables and Records

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

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

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

Shared Tables and Records

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

Note For additional information, see the technical manual for the primary product area. If multiple products are shown, the primary product is listed first.

If you make changes to schemas for the following records, you must reinstall each associated product.

- Academic Calendar record (acad_cal_rec)
 - Registration
- Admission record (adm_rec)
 - Admissions
 - Student Services
- Assessment table (assess_table)
 - Student Billing
- Assignment Calculation record (assgncalc_rec)
 - Student Billing
- Billing Fiscal Year table (fsbill_table)
 - Student Billing
- Charge table (chg_table)
 - Student Billing
- Deferment Application table (defapp_table)
 - Student Billing
- Deferment table (defer_table)
 - Student Billing
- Degree table (degree_table)
 - Registration
- Education record (ed_rec)
 - Registration
 - Admissions
 - Student Services
- Fiscal Calendar record (fsc_l_cal_rec)
 - General Ledger and Reporting
- Personnel record (pers_rec)

- Payroll/Personnel
- Position record (pos_rec)
 - Payroll/Personnel
- Position Funding table (posfnd_table)
 - Payroll/Personnel
- Payroll table (pr_table)
 - Payroll/Personnel
- Program Enrollment record (prog_enr_rec)
 - Admissions
 - Registration
 - Student Services
- Refund table (rfnd_table)
 - Student Billing
- School record (sch_rec)
 - Admissions
 - Registration
 - Student Services
- Student Academic record (stu_acad_rec)
 - Registration
 - Student Services
- Student Academic Sum record (acadsum_rec)
 - Admissions
- Student Statistics record (stu_stat_rec)
 - Registration
 - Student Services
- Student Total Status record (statsum_rec)
 - Registration
- Subsidiary Association table (subas_table)
 - General Ledger and Reporting
- Subsidiary Balances table (subb_table)
 - General Ledger and Reporting
- Subsidiary Total record (subt_rec)
 - General Ledger and Reporting
- Subsidiary Total table (subt_table)
 - General Ledger and Reporting

- Total Association table (totas_table)
 - General Ledger and Reporting

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

Financial Aid Tables and Records

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

- ACG Grant record (acgrant_rec)
- Aid Choice record (aidchoice_rec)
- Aid/Grant Association table (aidgrantas_table)
- Aid Detail record (aiddtl_rec)
- Aid Form table (aid_form_table)
- Aid History record (aid_hist_rec)
- Aid Packaging table (aidpkg_table)
- Aid record (aid_rec)
- Aid table (aid_table)
- Aid Transcript record (fatran_rec)
- Aid Type table (aid_type_table)
- Asset Protection table (apa_table)
- Available Taxable Income table (ati_table)
- Award Year Properties table (tfayr_table)
- Budget Group Association table (bgtgrpas_table)
- Budget Group table (bgtgrp_table)
- Business and Farm Net Worth table (busfarm_table)
- COD Student History record (codstuhist_rec)
- Compliance Association table (cplyas_table)
- Compliance Requirements table (cply_req_table)
- Compliance Sequence table (cply_seq_table)
- Compliance Criteria table (cply_crit_table)
- Contact-Edit Table (ctcfaedit_table)
- Country Code Association table (ctryas_table)
- Country Code table (ctrycode_table)
- Criteria table (crit_table)

- Decision Code table (fadec_table)
- Decision Criteria table (fadeccrit_table)
- Decision Result table (fadecres_table)
- Disbursements Status table (disbstat_table)
- Discretionary Net Worth table (dnw_table)
- Enrollment Schedule table (schdsess_table)
- Financial Aid Budget Detail record (fabgtdtl_rec)
- Financial Aid Budget Expense Association table (faexpas_table)
- Financial Aid Budget record (fabgt_rec)
- Financial Aid Budget table (fabgt_table)
- Financial Aid Detail table (aiddtl_table)
- Financial Aid Expense Item Association table (fabgtas_table)
- Financial Aid Expense Item table (fa_item_table)
- Financial Aid Method table (fameth_table)
- Financial Aid SAP Action table (fasapact_table)
- Financial Aid SAP Track table (saptrk_table)
- Financial Aid Schedule table (faschd_table)
- Financial Aid Session table (fasess_table)
- Financial Aid Tape Conversion record (natp_rec, natp0809_rec, ...natp1213_rec)
- Financial Aid Tax table (fatax_table)
- Financial Aid Transcript Loan record (faloan_rec)
- Financial Aid Verification table (faver_table)
- Financial Need record (faneed_rec)
- Financial SAP table (fasap_table)
- FISAP record (fisap_rec)
- Funding table (fndg_table)
- Gainful Employment table (gainfulemp_table)
- Grade Level table (gradelvl_table)
- Grant Type table (granttype_table)
- Guarantor table (loanguar_table)
- Independent Student Allowance table (isa_table)
- Institutional Student Information Report (ISIR) record (esar_rec, esar0809_rec, ...esar1213_rec)
- Intermediate Calculations record (fana_rec)
- Lender table (lender_table)

- Loan Aggregate record (loanagg_rec)
- Loan Alternative record (loanalt_rec)
- Loan Amount Maximums table (loanmax_table)
- Loan Batch record (loanbatch_rec)
- Loan Change record (loanchg_rec)
- Loan Disbursement record (loandisb_rec)
- Loan History record (loanhist_rec)
- Loan Orig table (loanorig_table)
- Loan Period Disbursement Information table (loanprd_table)
- Loan record (loan_rec)
- Loan Stat table (loanstat_table)
- Loan Status record (loanstat_rec)
- Loan Student record (loanstu_rec)
- Loan Tracking Change table (loanchg_table)
- Loan Tracking Disbursement Information table (loandisb_table)
- Loan Tracking Format table (loanfmt_table)
- Loan Tracking Record table (loanrec_table)
- Loan Type table (loantype_table)
- National Student Loan Data System record (nslds_rec, nslds0809_rec, ...nslds1213_rec)
- Need Analysis Form record (naf_rec, naf0809_rec, ...naf1213_rec)
- Package Method table (pkg_table)
- Package Objectives table (pkgobj_table)
- Packaging Parameter record (ppkg_rec)
- Partial Aid record (prtl_aid_rec)
- Partial Aid table (prtl_aid_table)
- Partial Aid History record (prtlhist_aid_rec)
- Pell Disbursement table (pelldisb_table)
- Pell Disbursement Year-to-Date (YTD) Report record (pelldisbrpt_rec)
- Pell History record (pell_hist_rec)
- Pell record (edepell_rec)
- Pell table (edepell_table)
- Pell Summary Record (pellsmary_rec)
- Pell Year-to-Date (YTD) Report record (pellrpt_rec)
- Posted Award record (post_aid_rec)

- Privacy table (fin_priv_table)
- Privacy record (finpriv_rec)
- SAP Criteria table (sapcrit_table)
- Schedule Session table (schdsess_table)
- SMART Grant record (smartgrant_rec)
- Student Aid Report (SAR) Number table (sarno_table)
- Student Financial Aid BLOB (bstufa_blob)
- Student Financial Aid record (stufa_rec)
- Tax Allowance table (taxallow_table)

Menus and Menu Options for Accessing Tables

The following table provides the name of the system table, its CX 8.1 menu option, the name of the menu from which the table is accessed, and any notes to help you locate the tables.

Table name in this document	CX 8.1 menu option	CX 8.1 menu	Notes
Aid Type table (aid_type_table)	Aid Types/Forms	Aid Tables	Same screen as Aid Form table
Aid Form table (aid_form_table)	Aid Types/Forms	Aid Tables	Same screen as Aid Type table
Funding Source table (fndg_table)	Funding Codes	Aid Tables	
Aid table (aid_table)	Aid Codes	Aid Tables	
Fund Balance (Aid Packaging Criteria) table (aidpkg_table) ***Optional***	Fund Balances	Aid Tables	
Partial Aid table (prtl_aid_table) ***Optional***	Partial Aid Detail	Aid Tables	
Enrollment Schedule table (faschd_table)	Enrollment Schedule	Enrollment Status Table	
Enrollment Status Session table (schdsess_table)	Enrollment Schedule	Enrollment Status Tables	If enabled via ENABLE_FEAT_MULTIPKG
Aid Detail table (aiddtl_table)	Aid Detail	Enrollment Status Tables	If enabled via ENABLE_FEAT_MULTIPKG
Financial Aid Session table (fasess_table)	Session	Enrollment Status Tables	If enabled via ENABLE_FEAT_MULTIPKG

Table name in this document	CX 8.1 menu option	CX 8.1 menu	Notes
Financial Aid Expense Item table (fa_item_table)	Budget Expense Items	Budget Tables	
Financial Aid Budget table (fabgt_table)	Budget Types	Budget Tables	
Financial Aid Expense Association table (fabgtas_table)	Expense/Subs. Total Assoc.	Budget Tables	
Budget Group table (bgtgrp_table)	Budget Group	Budget Table	If enabled via ENABLE_FEAT_MULTIPKG
Budget/Group Association table (bgtgrpas_table)	Budget Group	Budget Table	If enabled via ENABLE_FEAT_MULTIPKG
Financial Aid Budget Expense Association table (faexpas_table) ***Optional***	Budget Types	Budget Tables	Same screen as Financial Aid Budget table screen
Tickler table (tick_table)	Tickler	Contact/Tickler Tables	
Contact table (ctc_table)	Contact	Contact/Tickler Tables	
Privacy table (fin_priv_table)	Privacy Table	Privacy Table	First tab of screen
SAP Track table (saptrk_table)	SAP Codes	SAP Table Menu	If enabled via ENABLE_FEAT_FA_SAP
Financial Aid SAP table (fasap_table)	SAP Codes	SAP Table Menu	If enabled via ENABLE_FEAT_FA_SAP
SAP Action table (fasapact_table)	SAP Codes	SAP Table Menu	If enabled via ENABLE_FEAT_FA_SAP
Criteria table (crit_table)	SAP Criteria	SAP Table Menu	If enabled via ENABLE_FEAT_FA_SAP
SAP Criteria table (sapcrit_table)	SAP Criteria	SAP Table Menu	If enabled via ENABLE_FEAT_FA_SAP
Compliance Association table (cplyas_table)	Compliance Codes	Compliance Tables	First tab of screen
Compliance Requirements table (cply_req_table)	Compliance Codes	Compliance Tables	First tab of screen

Table name in this document	CX 8.1 menu option	CX 8.1 menu	Notes
Compliance Sequence table (cply_seq_table)	Compliance Codes	Compliance Tables	First tab of screen
Compliance Criteria table (cply_crit_table)	Compliance Codes	Compliance Tables	Second tab of screen
Packaging Method table (pkg_table)	Packaging Codes	Packaging Tables	Same screen as Package Objective and Packaging Criteria table
Package Objective table (pkgobj_table)	Packaging Codes	Packaging Tables	Same screen as Packaging Method and Packaging Criteria table
Aid Packaging Criteria table (aidpkg_table)	Packaging Codes	Packaging Tables	Same screen as Packaging Method and Package Objective table
Verification table (faver_table)	FA Verification	Verification Tables	

Required Tables and Records

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

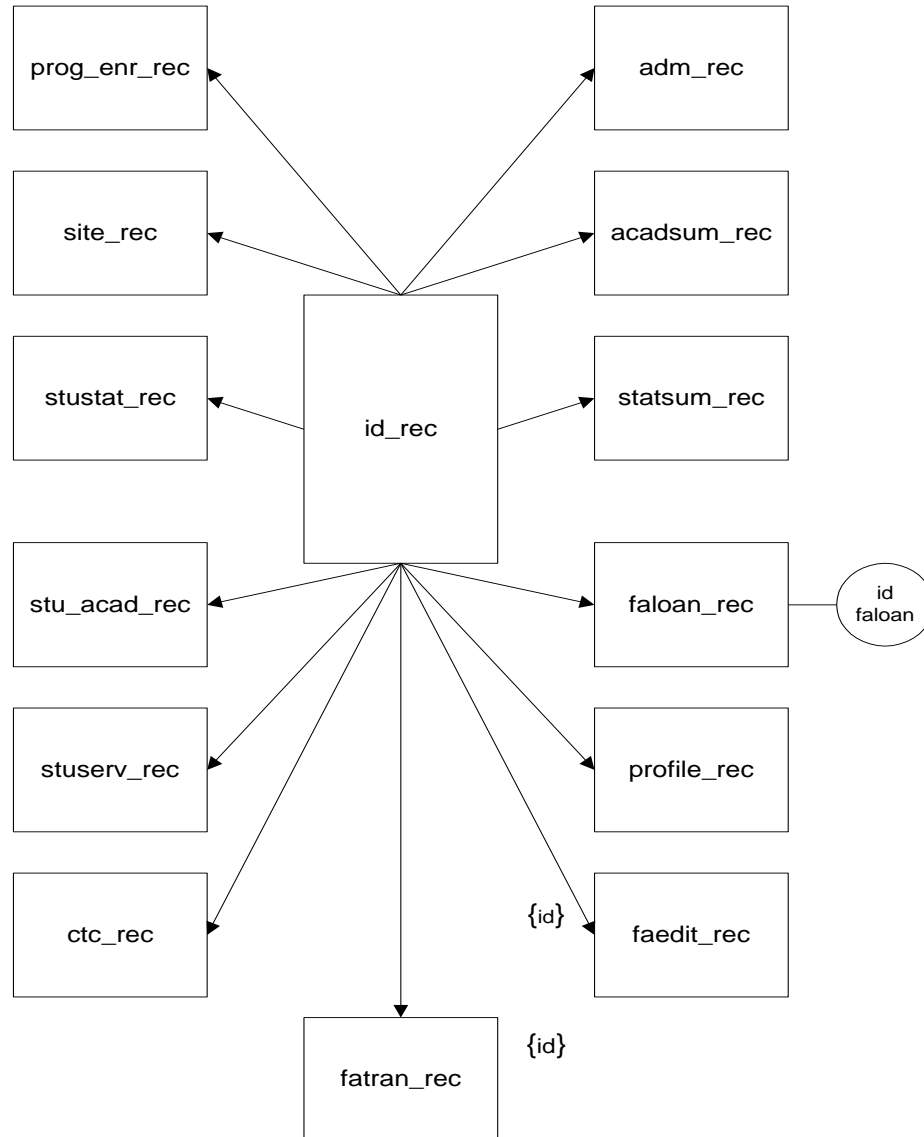
- ID record (id_rec)
- Profile record (profile_rec)

Table and Record Relationships

The following diagrams show the relationships for some important database entries.

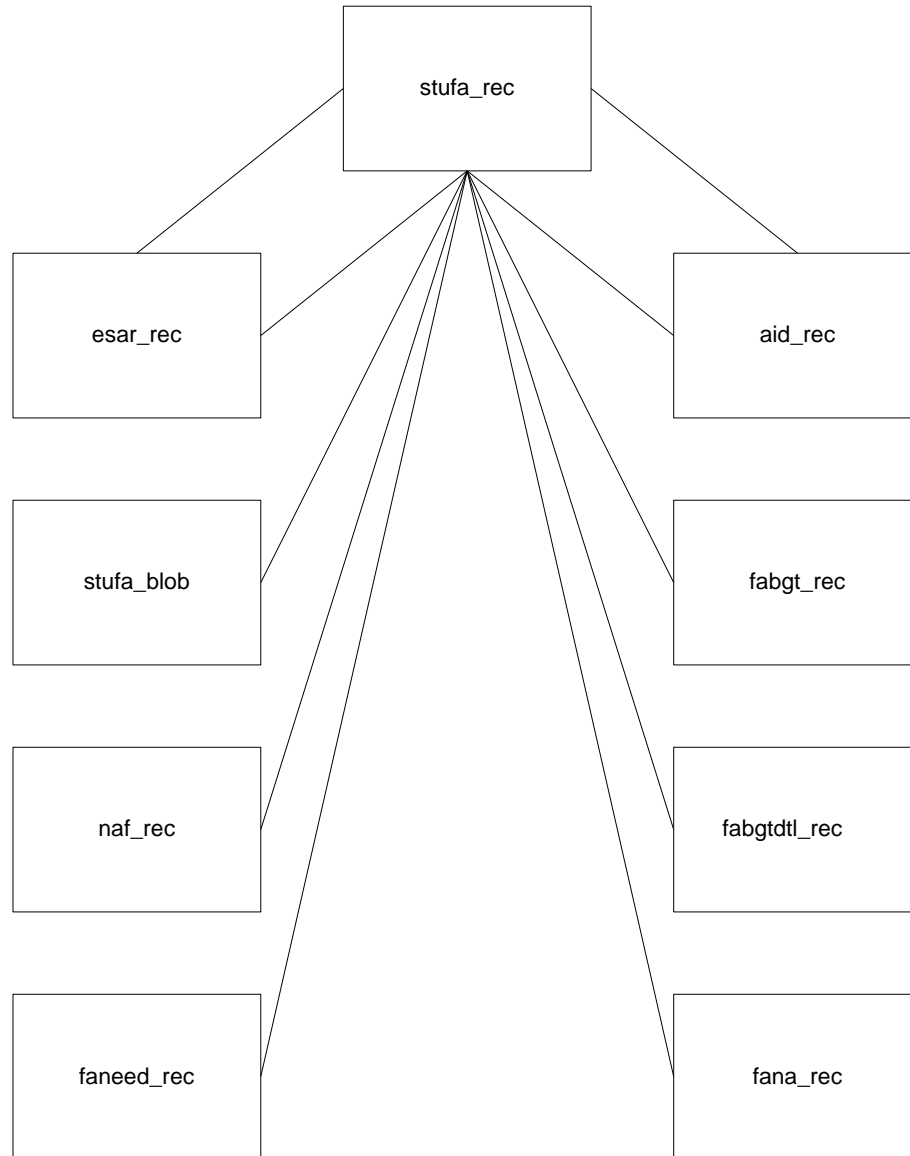
Entity Relationship Diagram (ID record)

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



Entity Relationship Diagram (Student Financial Aid record)

The following diagram shows the relationship between the Student Financial Aid record (stufa_rec) and other records used by the Financial Aid product. The year-specific tables associated with esar_rec and naf_rec (esar0809_rec, ...esar1213_rec, naf0809_rec, ...naf1213_rec) have the same relationships for their respective year.



Financial Aid Schemas

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

File Naming Conventions

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

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

Field Descriptions

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

Schema File Reports

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

Report Locations

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

Report Descriptions

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

Database Fields for the CX Database Dictionary

Report filename: *dbefield*

Menu option: Fields by File Report

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

Database Files for the CX Database Dictionary

Report filename: *dbefile*

Menu option: Fields by Track Report

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

Database Files/Fields for the CX Database Dictionary by Track

Report filename: *dbetrack*

Menu option: File/Field by Track Report

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

Financial Aid Tables and Records

The following tables and records originate from the Financial Aid product. Information in this section regarding these tables and records includes the filenames, location, purpose, and associations with programs, products, and other tables and records. The tables and records appear in the following order:

- Aid History record
- Compliance tables and records
- Electronic Data Exchange (EDE) tables and records
- Enrollment Status tables
- Expense Budget tables and records
- Gainful Employment table
- Loan Aggregate record
- Loan tables and records
- Loan History record
- Need Analysis tables and records
- Packaging tables and records
- Partial Aid History record
- Pell tables and records
- Pell History record
- Primary Financial Aid tables and records
- Privacy table and record
- Satisfactory Academic Progress (SAP) tables
- Verification tables
- Decision tables
- Loan Type table

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

Compliance Tables and Records

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

Compliance Association table

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

UNIX filename: `tcplyas`

Informix filename: `cplyas_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `cply_seq_table`

Compliance Requirements table

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

UNIX filename: `tcplyreq`

Informix filename: `cply_req_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `none`

Compliance Sequence table

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

UNIX filename: `tcplyseq`

Informix filename: `cply_seq_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `cplyas_table, cply_crit_table`

Compliance Criteria table

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

UNIX filename: *tcplycrit*

Informix filename: *cply_crit_table*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *faentry*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *cply_seq_table*

EDE Tables and Records

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

Institutional Student Information Report (ISIR)

Contains all ISIR (Institutional Student Information Report, formerly ESAR (Electronic Student Aid Report)) data received from the CPS. The record allows the Financial Aid office to keep all CPS transactions (not just the most current) in the event that payment was not made on the most current transaction number. Therefore, a student can have multiple ISIR records (*esar_rec*, *esar0809_rec*, ...*esar1213_rec*) that correspond to each CPS transaction that the student has processed. Beginning with 2008-2009, each award year has a specific table of its own. The table for previous years remains unchanged.

UNIX filename: *esar*, *esar0809*, ... *esar1213*

Informix filename: *esar_rec*, *esar0809_rec*, ...*esar1213_rec*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *none*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *none*

Student Aid Report (SAR) Number table

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

UNIX filename: *tsarno*

Informix filename: *sarno_table*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *none*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *naf_rec*, *naf0809_rec*, ...*naf1213_rec*

Enrollment Status Tables and Records

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

Aid Detail record

Identifies the award amount for each enrollment status.

UNIX filename: `aidctl`

Informix filename: `aidctl_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `aidctl_table, aid_rec`

Financial Aid Detail table

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

UNIX filename: `taidctl`

Informix filename: `aidctl_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `aid_table`

Financial Aid Enrollment Schedule table

Identifies the institution's enrollment schedules.

UNIX filename: `tschdsess`

Informix filename: `schdsess_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `faschd_table`

Table/record interrelationships: `none`

Financial Aid Schedule table

Identifies the different enrollment schedules for the institution.

UNIX filename: `tfaschd`

Informix filename: `faschd_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `schdsess_table`

Financial Aid Session table

Contains detailed financial aid session specific information.

UNIX filename: *tfasess*

Informix filename: *fasess_table*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *faentry*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *none*

Schedule Session table

Identifies the institution's different enrollment schedules.

UNIX filename: *tschdsess*

Informix filename: *schdsess_table*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *faentry*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *faschd_table*

Expense Budget Tables and Records

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

Financial Aid Budget Detail record

Contains individual student financial aid expense budget item amounts.

UNIX filename: *fabgtdtl*

Informix filename: *fabgtdtl_rec*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *faentry, faneed*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *fabgt_rec*

Budget Group Association table

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

UNIX filename: *tbgtgrpas*

Informix filename: *bgtgrpas_table*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *faentry*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *bgtgrp_table*

Budget Group table

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

UNIX filename: `tbgtgrp`

Informix filename: `bgtgrp_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `bgtgrpas_table`

Financial Aid Budget Expense Association table

Associates subsidiary total codes with expense item codes for display in the *faneed* program on its budget display screen. *Faneed* uses this table to read in the actual expenses associated with an expense item so that estimated budget expenses can be compared to the actual expenses.

UNIX filename: `tfaexpas`

Informix filename: `faexpas_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faneed`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fa_item_table`

Financial Aid Budget record

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

UNIX filename: `fabgt`

Informix filename: `fabgt_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faneed`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fabgtdtl_rec, fabgt_table, stufa_rec`

Financial Aid Budget table

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

UNIX filename: `tfabgt`

Informix filename: `fabgt_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faneed, faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fabgtas_table`

Financial Aid Expense Item table

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

UNIX filename: `tfaitem`

Informix filename: `fa_item_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faneed, faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fabgtas_table, faexpas_table`

Financial Aid Expense Item Association table

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

UNIX filename: `tfabgtas`

Informix filename: `fabgtas_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faentry, faneed`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fabgt_table, fa_item_table`

Loan Tables and Records

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

COD MPN Record

Records the MPN information for a student, imported from COD.

UNIX filename: `codmpn`

Informix filename: `codmpn_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `none`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `id_rec, loan_rec`

Disbursements Status Table

Defines valid disbursement statuses in loan tracking.

UNIX filename: `tdisbstat`

Informix filename: `disbstat_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `loans, loantable`

Product interrelationships: `Financial Aid Loan`

Table/record interrelationships: `loandisb_rec, aid_rec`

Grade Level Table

Defines valid grade levels used in the loan tracking module.

UNIX filename: tgradelvl

Informix filename: gradelvl_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loanorig_table

Guarantor Table

Defines valid guarantee agencies for loan tracking module.

UNIX filename: tloanguar

Informix filename: loanguar_table

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Lender Table

Defines valid lenders for the loan tracking module.

UNIX filename: tlender

Informix filename: lender_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Loan Alternative Record

Contains Alternative Loan Information.

UNIX filename: loanalt

Informix filename: loanalt_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: aid_rec

Loan Amount Maximums Table

Contains maximum loan amounts based on grade level.

UNIX filename: tloanmax

Informix filename: loanmax_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loantype_table, gradelvl_table

Loan Batch Record

Stores import/export loan tracking file information.

UNIX filename: `loanbatch`

Informix filename: `loanbatch_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `loans, loanede`

Product interrelationships: `Financial Aid Loan`

Table/record interrelationships: `loanorig_table`

Loan Change Record

Stores change request information.

UNIX filename: `loanchg`

Informix filename: `loanchg_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `loans`

Product interrelationships: `Financial Aid Loan`

Table/record interrelationships: `loan_rec, loandisb_rec`

Loan Disbursement Record

Contains loan disbursement information.

UNIX filename: `loandisb`

Informix filename: `loandisb_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `loans, loanede, loanpost`

Product interrelationships: `Financial Aid Loan`

Table/record interrelationships: `disbstat_table, loan_rec, aid_rec`

Loan Orig Table

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

UNIX filename: `tloanorig`

Informix filename: `loanorig_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `loans, loantable`

Product interrelationships: `Financial Aid Loan`

Table/record interrelationships: `loan_rec`

Loan Period Disbursement Information Table

Contains loan period disbursement grouping information.

UNIX filename: tloanprd

Informix filename: loanprd_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Loan Record

Contains CommonLine and Direct Lending Loan Information.

UNIX filename: loan

Informix filename: loan_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

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

Loan Stat Table

Defines valid loan statuses for the loan tracking module.

UNIX filename: tloanstat

Informix filename: loanstat_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: disbstat_table, loan_rec

Loan Status Record

Contains loan status history information.

UNIX filename: loanstat

Informix filename: loanstat_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loanstat_table

Loan Student Record

Contains Student Loan Information for PLUS loans.

UNIX filename: loanstu

Informix filename: loanstu_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec

Loan Tracking Change Table

Stores CommonLine loan tracking change field numbers.

UNIX filename: tloanchg

Informix filename: loanchg_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loanorig_table

Loan Tracking Disbursement Information Table

Contains loan disbursement date information.

UNIX filename: tloandisb

Informix filename: loandisb_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loandisb_rec, loan_rec

Loan Tracking Format Table

Stores import/export loan tracking format information.

UNIX filename: tloanfmt

Informix filename: loanfmt_table

Schema location: \$CARSPATH/schema/student

Program interrelationships: loans, loantable, loanede

Product interrelationships: Financial Aid Loan

Table/record interrelationships: loan_rec, loanorig_table, loanrec_table

Loan Tracking Record Table

Stores loan tracking record type information.

UNIX filename: `tloanrec`

Informix filename: `loanrec_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `loans, loantable, loanede`

Product interrelationships: `Financial Aid Loan`

Table/record interrelationships: `loanfmt_table`

Loan Type Table

Defines valid loan types for the loan tracking module.

UNIX filename: `tloantype`

Informix filename: `loantype_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `loans, loantable`

Product interrelationships: `Financial Aid Loan`

Table/record interrelationships: `loan_rec, loanorig_table`

Need Analysis Tables and Records

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

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

Asset Protection table

Contains the Department of Education-defined asset protection allowance.

UNIX filename: `tapa`

Informix filename: `apa_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `faneed`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `none`

Available Taxable Income table

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

UNIX filename: `tati`

Informix filename: `ati_table`

Program interrelationships: `faneed`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `none`

Award Year Properties table

Contains properties for Financial Aid Award Years.

UNIX filename: tfayr

Informix filename: fayr_table

Program interrelationships: getFinancialAidAwards.pl

Product interrelationships: Financial Aid

Table/record interrelationships: cplyas_table, fadec_table, pkg_table

Business and Farm Net Worth table

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

UNIX filename: tbusfarm

Informix filename: busfarm_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Discretionary Net Worth table

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

UNIX filename: tdnw

Informix filename: dnw_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Financial Aid Method table

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

UNIX filename: tfameth

Informix filename: fameth_table

Program interrelationships: faneed, faentry

Product interrelationships: Financial Aid

Table/record interrelationships: none

Financial Aid Tape Conversion record

Contains student financial aid information received from various financial aid tapes, including: Federal Test tape, ACT, CSS, GAPFAS, and PHEAA. Beginning with 2008-2009, each award year has a specific table of its own. The table for previous years remains unchanged. The record is grouped in the following way:

- Tape identification fields
- Data element dictionary
- Common information (between at least two of the need analysis services)
- rec (contains id_rec, profile_rec, and stufa_rec information so that separate sections do not need to be created for these records)

- faneed_rec
- fana_rec
- fabgt_rec
- Federal-specific information
- ACT-specific information
- CSS-specific information
- GAPFAS-specific information
- PHEAA-specific information
- NSLDS-specific information
- Composite indexes

UNIX filename: natp, natp0809, ...natp1213

Informix filename: natp_rec, natp0809_rec, ...natp1213_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: fabgt_rec, fana_rec, faneed_rec, id_rec, naf_rec (naf0809_rec, ...naf1213_rec, profile_rec, prog_table, stufa_rec

Financial Aid Tax table

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

UNIX filename: tfatax

Informix filename: fatax_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Financial Need record

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

UNIX filename: faneed

Informix filename: faneed_rec

Program interrelationships: faneed

Product interrelationships: Financial Aid

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

Independent Student Allowance table

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

UNIX filename: tisa

Informix filename: isa_table

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: none

Intermediate Calculations record

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

UNIX filename: fana

Informix filename: fana_rec

Program interrelationships: faneed, faentry

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec

Need Analysis Form record

Contains financial aid need analysis form (NAF) information. The record stores student family information. *Faneed* adds and updates this record. Beginning with 2008-2009, each award year has a specific table of its own. The table for previous years remains unchanged. A student has a naf_rec, naf0809_rec, ...naf1213_rec for each financial aid award year.

UNIX filename: naf, naf_rec, naf0809_rec, ...naf1213_rec

Informix filename: naf_rec, naf0809_rec, ...naf1213_rec

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec, faneed_rec, natp_rec, natp0809_rec, ...natp1213_rec

National Student Loan Data System record

Contains historical information about student loans from NSLDS information from the Department of Education. The record stores student loan history information. *Faneed* adds and updates this record. Beginning with 2008-2009, each award year has a specific table of its own. The table for previous years remains unchanged. A student has an nslds_rec (or nslds0809_rec, ...nslds1213_rec) for each financial aid award year.

UNIX filename: nslds, nslds0809, ...nslds1213

Informix filename: nslds_rec, nslds0809_rec, ...nslds1213_rec

Program interrelationships: faneed

Product interrelationships: Financial Aid

Table/record interrelationships: stufa_rec, faneed_rec, natp_rec, natp0809_rec, ...natp1213_rec, naf_rec, naf0809_rec, ...naf1213_rec

Tax Allowance table

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

UNIX filename: `ttaxallow`

Informix filename: `taxallow_table`

Program interrelationships: `faneed`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `st_table`

Packaging Tables and Records

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

Aid Packaging table

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

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

UNIX filename: `taidpkg`

Informix filename: `aidpkg_table`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `pkg_table, pkgobj_table`

Package Method table

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

UNIX filename: `tpkg`

Informix filename: `pkg_table`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `pkgobj_table, aidpkg_table`

Package Objectives table

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

UNIX filename: `tpkgobj`

Informix filename: `pkgobj_table`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `pkg_table, aidpkg_table,`

Packaging Parameter record

Defines the parameters used to run automated Financial Aid Packaging.

UNIX filename: `ppkg`

Informix filename: `ppkg_rec`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `pkg_table`

Pell Tables and Records

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

Pell record (formerly EDE/Pell record)

Contains a student's Pell COD award information.

UNIX filename: `edepell`

Informix filename: `edepell_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `rfme.y`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `pelldisb_rec, id_rec, naf_rec, naf0809_rec, ...naf1213_rec, fabgt_rec, acad_cal_rec, aid_rec, faneed_rec, fameth_table`

Pell table (formerly, EDE/Pell table)

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

UNIX filename: `tedepell`

Informix filename: `edepell_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `edepell, rfme.y`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `edepell_rec, pelldisb_rec, id_rec, naf_rec, naf0809_rec, ...naf1213_rec, fabgt_rec, acad_cal_rec, aid_rec, faneed_rec, fameth_table`

Pell Disbursement record

Maintains and tracks reported disbursement data.

UNIX filename: pelldisb

Informix filename: pelldisb_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: edepell

Product interrelationships: Financial Aid

Table/record interrelationships: edepell_rec, id_rec, naf_rec, naf0809_rec, ...naf1213_rec, fabgt_rec, acad_cal_rec, aid_rec, stufa_rec

Pell Year-to-Date (YTD) Report record

Table/record interrelationships: Obsolete. Instead of using this report, use Report->Format COD Reports to get a readable version of the file and Report->Compare YTD Report to compare the file with the database records.

Pell Disbursement Year-to-Date (YTD) Report Record

Maintains and tracks reported disbursement data.

UNIX filename: pelldisbrpt

Informix filename: pelldisbrpt_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: None

Product interrelationships: Financial Aid

Table/record interrelationships: id_rec, edepell_rec, pellrpt_rec

Pell Summary Record

Summarizes Pell data from the COD YTD Report.

UNIX filename: pellsmry

Informix filename: pellsmry_rec

Schema location: \$CARSPATH/schema/student

Program interrelationships: None

Product interrelationships: Financial Aid

Table/record interrelationships: None

COD Contact Temporary Record

Records the SSN and other data from Entrance Counseling information, imported from COD, for creating a Contact record later when the student's SSN is not recognized in CX. (Does not exist in the ID records.)

UNIX filename: `codctctmp`

Informix filename: `codctctmp_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `none`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `ctc_table`

COD Student History

Retains the last student information submitted to COD. The script that exports COD XML compares the information in this table with the current information, and only the differences are exported.

UNIX filename: `codstuhist`

Informix filename: `codstuhist_rec`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `None`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `faxmlbch_rec, id_rec, naf_rec, naf0809_rec, ...naf1213_rec, profile_rec, pellhist_rec, pelldisbhist_rec, loanhist_rec, loandisbhist_rec`

Primary Financial Aid Tables and Records

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

Award Choices table

Contains a student's financial aid award choices as accepted or declined on the Web through the financial aid CRM.

UNIX filename: `aidchoice`

Informix filename: `aidchoice_rec`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `stufa_rec, aid_table, aid_rec.aid`

Aid record

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

UNIX filename: `aid`

Informix filename: `aid_rec`

Program interrelationships: `billing, faentry`

Product interrelationships: `Student Billing, Financial Aid`

Table/record interrelationships: `stufa_rec, aid_table`

Aid table

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

UNIX filename: `taid`

Informix filename: `aid_table`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `aid_rec, aid_form_table, fndg_table`

Aid Form table

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

UNIX filename: `taidform`

Informix filename: `aid_form_table`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `aid_type_table, aid_table`

Aid Transcript record

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

UNIX filename: `fatran`

Informix filename: `fatran_rec`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `faloan_rec`

Aid Type table

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

UNIX filename: `taidtype`

Informix filename: `aid_type_table`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `aid_form_table`

Financial Aid Transcript Loan record

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

UNIX filename: `faloan`

Informix filename: `faloan_rec`

Program interrelationships: `faentry`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `stufa_rec`

FISAP record

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

UNIX filename: *fisap*

Informix filename: *fisap_rec*

Program interrelationships: *fisap*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *stufa_rec, id_rec, faneed_rec, fana_rec, nslds_rec, nslds0809_rec, ...nslds1213_rec (nslds0809_rec), naf_rec, nafrec0809_rec, ...nafrec1213_rec, profile_rec, fscl_cal_rec, aid_rec, fisap_rec, faedit_rec, immeth_table*

Funding table

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

UNIX filename: *tfndg*

Informix filename: *fndg_table*

Program interrelationships: *faentry*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *none*

Student Financial Aid record

Contains general student financial aid information within an award year.

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

UNIX filename: *stufa*

Informix filename: *stufa_rec*

Program interrelationships: *faentry, faneed, fisap, sap*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *id_rec, esar_rec, esar0809_rec, ...esar1213_rec, fafbt_rec, fana_rec, faneed_rec, naf_rec, naf0809_rec, ...naf1213_rec, aid_rec*

Student Financial Aid BLOB

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

UNIX filename: *bstufa*

Informix filename: *bstufa_blob*

Program interrelationships: *faentry, faneed*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *stufa_rec*

Partial Aid record

Contains Partial Financial Aid Award amounts, allowing simple disbursing of Aid Record money in payments.

UNIX filename: prtlaid

Informix filename: prtl_aid_rec

Program interrelationships: billing, faentry

Product interrelationships: Student Billing, Financial Aid

Table/record interrelationships: aid_rec, pelldisb_rec

Partial Aid table

Defines initial Partial Financial Aid Award values to insert when creating an award.

UNIX filename: tprtlaid

Informix filename: prtl_aid_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: prtl_aid_rec, aid_table

Posted Aid record

Contains Financial Aid Award amounts ready to be posted by A/R Management's Student Billing module. Not used by classic Student Billing.

UNIX filename: postaid

Informix filename: post_aid_rec

Program interrelationships: faentry

Product interrelationships: A/R Management, Financial Aid

Table/record interrelationships: aid_rec

Privacy Table

The following schema file defines the table used for privacy codes in the Financial Aid product.

Privacy table

Identifies the privacy codes defined by the institution.

UNIX filename: finpriv

Informix filename: fin_priv_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: finpriv_rec

Satisfactory Academic Progress Tables and Records

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

Criteria table

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

- ROOT

- UNDG
- GRAD
- GEN
- SCHL

UNIX filename: tcrit

Informix filename: crit_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: sapcrit_table

Financial Aid SAP Action table

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

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

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

UNIX filename: tfasapact

Informix filename: fasapact_table

Program interrelationships: faentry

Product interrelationships: Financial Aid

Table/record interrelationships: fasap_table, fasap_rec

Financial Aid SAP Track table

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

- FINAID
- REGIST
- SCHOLAR
- VETERANS

UNIX filename: tsaptrk

Informix filename: saptrk_table

Program interrelationships: faentry, fasap

Product interrelationships: Financial Aid

Table/record interrelationships: sap_rec, fasap_table, fasap_rec

Financial SAP table

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

- PASS

- PROB
- SUSP
- FAIL
- WARN
- APPL
- FFAL
- FPAS

UNIX filename: *tfasap*

Informix filename: *fasap_table*

Program interrelationships: *faentry*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *faspact_table, stufa_rec*

SAP Criteria table

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

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

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

UNIX filename: *tsapcrit*

Informix filename: *sapcrit_table*

Program interrelationships: *faentry*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *crit_table*

Verification Table

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

Financial Aid Verification table

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

UNIX filename: *tfaver*

Informix filename: *faver_table*

Schema location: *\$CARSPATH/schema/student*

Program interrelationships: *faneed*

Product interrelationships: *Financial Aid*

Table/record interrelationships: *naf_rec, naf0809_rec, ...naf1213_rec*

Decision Tables

The following schema files define the tables used to set up decision criteria for the automated assignment of budget groups, budget codes, items, maximum package amounts, and package groups.

Financial Aid Decision table

Provides names for the decisions you want to assign using automated processes.

UNIX filename: `tfadec`

Informix filename: `fadec_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `fadec, fadecgrp, fabgt`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fadecres_table`

Financial Aid Criteria table

Defines the criteria by which you want to assign financial aid budget groups/codes, cost of financial aid items, and maximum package amounts.

UNIX filename: `tfadeccrit`

Informix filename: `fadeccrit_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `fadec, fadecgrp, fabgt`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fadecres_table`

Financial Aid Result table

Defines the actions to be taken or the codes to be assigned when the decision criteria is met.

UNIX filename: `tfadecres`

Informix filename: `fadecres_table`

Schema location: `$CARSPATH/schema/student`

Program interrelationships: `fadec, fadecgrp, fabgt`

Product interrelationships: `Financial Aid`

Table/record interrelationships: `fadec_table`



Program Files

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

def.c

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

mac.h

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

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

Definition File

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

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

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

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

- Includes for a *mac.h* file
- Global program variables
- Includes for schema files *def.c* files

- Form pointers that provide the location for forms
- Sqlda pointers that bind the file structure to the form
- dmm, dml and dmlt definitions
- Program parameters
- Declarations of functions so the compiler can handle a call of that function

Example of a *def.c* File

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

Note The legend for the file contents follows this illustration.



Legend for the *def.c* file:

1. *mac.h* include
2. schema file *def.c*'s

3. screen binds
4. structure definitions
5. parameters

mac.h Files

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

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

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

Example of a *mac.h* File

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

Note The legend for the file contents follows this illustration.

```

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

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

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

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

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

The diagram shows a vertical line on the right side of the code block, with four numbered circles (1, 2, 3, 4) connected to specific sections of the code by horizontal lines. Circle 1 points to the first set of include statements. Circle 2 points to the second set of include statements. Circle 3 points to the macro definitions. Circle 4 points to the structure definition.

Legend for the *mac.h* file:

1. includes for header files

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



Financial Aid Entry

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

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

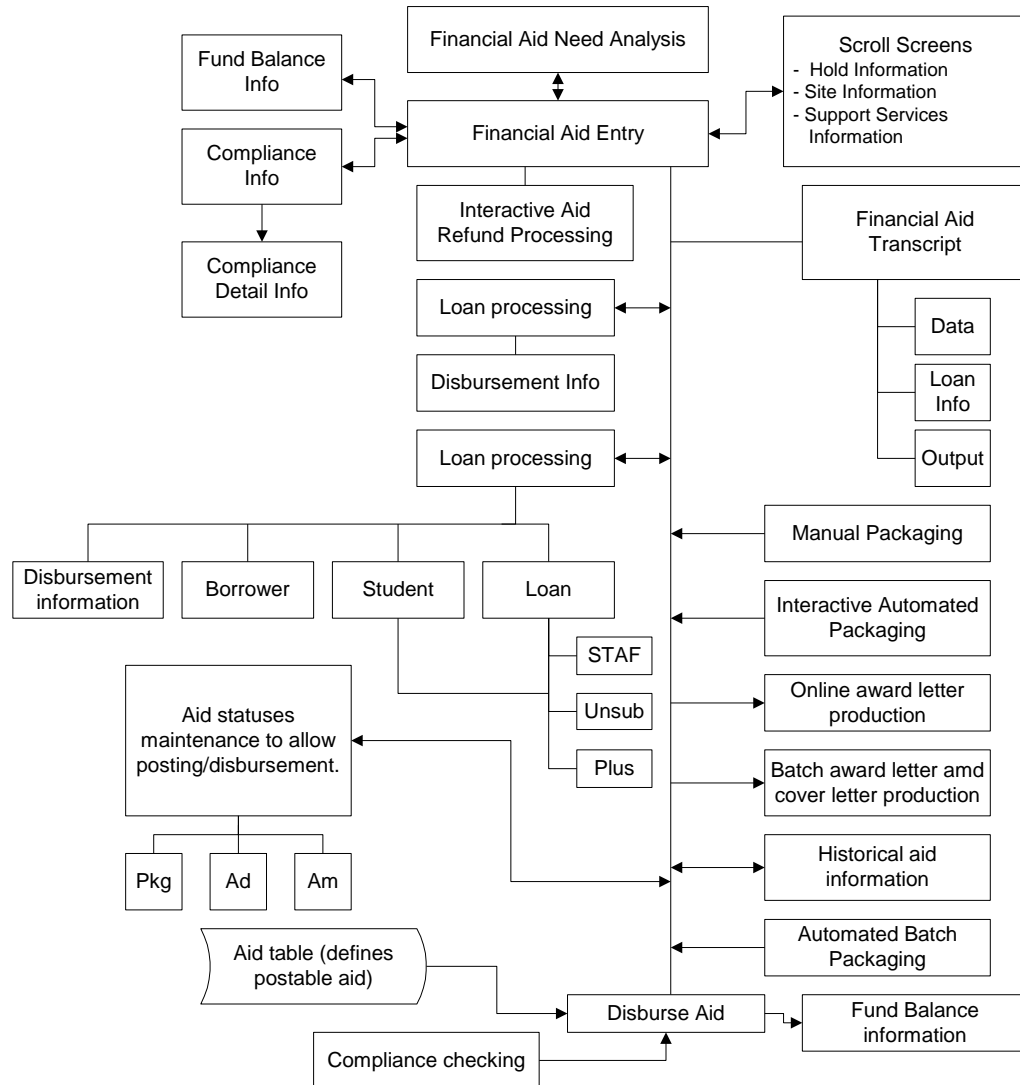
Program Features Detailed

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

- Process flow
- Parameters
- Program screens

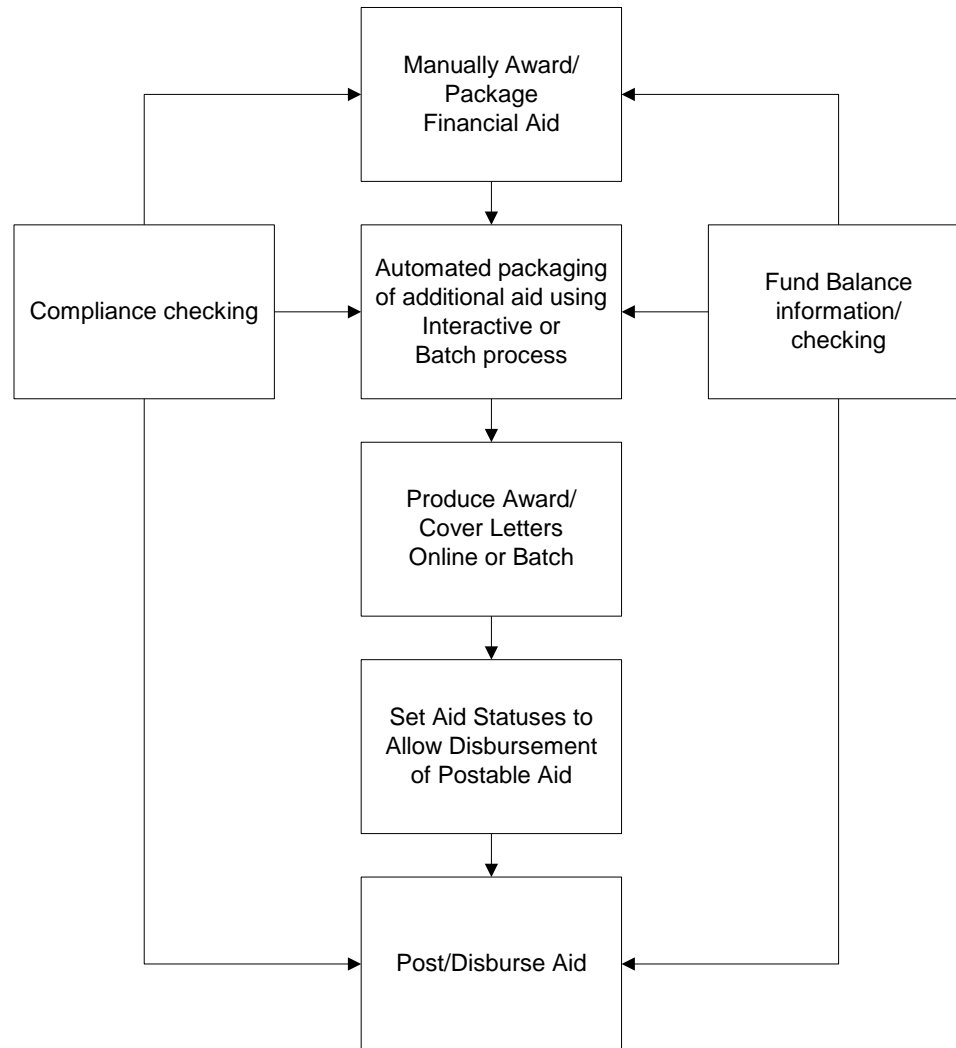
Process Flow

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



Financial Aid Entry Diagram

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



Data Flow Description

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

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

4. To allow for disbursement of aid to students, the user sets the students' aid status codes appropriately and ensures that the students meet compliance.
The Aid table defines those aid codes that can be posted.
5. The user posts and/or disburses aid to students' accounts.
The system also performs compliance and fund balance checking. The user may obtain information on compliance and/or fund balance information for any aid code.

Financial Aid Packaging Processing

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

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

Compliance Checking

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

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

Enrollment Status Packaging

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

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

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

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

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

Automatic Recalculation of Financial Aid Awards

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

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

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

Partial Aid Records Packaging

When the Packaged award amount is installed, if there are rows defined in the Partial Aid Table for the specified Aid code, Award Year, and Sessions, Partial Aid Records are created. The amount in each Partial Aid Record is defined as:

- If the table's Amount Type = D, the table's Amount is the Dollar Amount of the Partial Aid Record
- If the table's Amount Type = R, the table's Amount/Percent is the rounded percentage of the Packaged Award amount
- If the table's Amount Type = T, the table's Amount/Percent is the truncated percentage of the Packaged Award amount
- If the table's Amount Type = L, the Packaged Award amount minus all other Partial Aid Record amounts is used for this last Partial Aid Record amount, meaning the leftover amount

Compliance Checking

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

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

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

Types of Compliance

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

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

Categories of Compliance Requirements

Compliance requirements fall into two categories:

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

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

Passing Compliance Testing

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

Financial Aid Entry Parameters

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

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

Parameter Syntax

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

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

To operate in normal interactive mode:

Usage: faentry -l subs [-D display only, -v verify compliance, -C turn on loan autocreation]

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

To post financial aid in up to 4 sessions:

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

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -a -F -j 053113
-i ignore pkgstat -B ACAD -E ZZZZ

To select and format award notices:

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

Example: faentry -y 1213 -l S/A -s FA12 SP13 -c SP12 -f anform -r
053113

To print Student Compliance Audit:

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

Example: faentry -y 1213 -l S/A -p UNDG -s FA12 -o audit.out -v B

To operate using Background (Batch) Packaging:

Usage: faentry -y year -l subs -s session(s) -p prog -P pkgcode [-C turn on loan autocreation]

Example: faentry -y 1213 -l S/A -s FA12 SP13 -p UNDG -P SIM -C

Parameters

The following lists the parameters for running Financial Aid Entry.

-a

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

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -a

-A runcode

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

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

-B beginning aid code

Required – defines the beginning of an alphabetic range of Aid Codes to post.

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -a -F -j 053113
-i ignore pkgstat -B ACAD -E ZZZZ

-c current session

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

Example: faentry -y 1213 -l S/A -s FA12 SP13 -c SP13 -f entry -r 053113

-C turn on loan autocreation

Optional – Causes faentry to create loans automatically.

-d

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

Example: faentry -y 1213 -l S/A -s FA12 SP13 -p UNDG -d -a

-D

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

Example: faentry -l S/A -D

-E ending aid code

Required – defines the end of an alphabetic range of Aid Codes to post.

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -a -F -j 053113 -i ignore pkgstat -B ACAD -E ZZZZ

-f form

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

Example: faentry -y 1213 -l S/A -s FA12 -c SP13 -f aidpkg -r 053113

-F

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

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -a -F

-j date

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

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -a -j 053113

-i ignore pkgstat

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

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -a -i

-I number

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

Example: faentry -l S/A -s FA12 SP13 -p UNDG -v -I 400004

-k enable lock files

Optional – When Y (the default), locker files are created to track the userid that has locked a Student Financial Aid record (stufa_rec). When N, the locker files are not created, but database locks are still held.

Example: faentry -l S/A -s FA12 SP13 -p UNDG -v -k

-l subs

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

Example: faentry -l S/A

-L cur_site

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

Example: faentry -l S/A -L main

-o output

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

Example: faentry -y 1213 -l S/A -p UNDG -s FA12 -o cplyaudit.out

-p prog

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

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -d -F, -j 053113

-P pkgcode

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

Example: faentry -y 1213 -l S/A -s FA12 -p UNDG -P SIM

-r return date

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

Example: faentry -y 1213 -l S/A -s FA12 SP13 -c FA12 -f ANFORM
-r 053113

-s session(s)

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

Example: faentry -y 1213 -l S/A -s FA12 SP13 -p UNDG -d -a

-v A, D, or B

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

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

Example: faentry -l S/A -y 1213 -s FA12 SP13 -p UNDG -v B

-y fayr

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

Example: faentry -y 1213 -l S/A -s FA12 -c SP13 -f entry -r 053113

Program Screens

Financial Aid Entry has sixteen screens and four forms for performing the following interactive functions:

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

Access

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

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

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

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

Screen Files and Table/Record Usage

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

aiddtl

Contains the Aid By Enrollment Status List screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_rec, aid_table, aiddtl_rec, aiddtl_table, faschd_table

aidhelp

Contains the Financial Aid Help screen.

\$CARSPATH/src/finaid/faentry/SCR

aidpkg

Contains the Packaging Detail screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faneed_rec, faschd_table, stufa_rec

awddisb

Contains the Award Disbursements screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: id_rec, stufa_rec

cply

Contains the Compliance Requirements screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, id_rec

cplydtl

Contains the Compliance Detail Information screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, id_rec

disbdtl

Contains the Disbursement Records (Partial Aid records) screen.

\$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: aid_rec, part_aid_rec

disbhist

Contains the Disbursement History Records (Partial Aid records) screen.

\$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: prtlhist_aid, prtl_aid_rec

entry

Contains the main Financial Aid Entry screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, faneed_rec, id_rec, stufa_rec

entry2

Contains the main Financial Aid Entry screen.

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

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faneed_rec, id_rec, stufa_rec

fabal

Contains the Current Fund Balances screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: aid_table, aidpkg_table

faloan

Contains the Financial Aid Transcript Loan History screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faloan_rec, id_rec

fasite

Contains the Site Record screen.

\$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: site_rec

fatran

Contains the Financial Aid Transcript Information screen.

\$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: fatran_rec, id_rec

hold

Contains the Holds detail window.

\$CARSPATH/modules/Lib/progscr/libentry

listpkg

Contains the Packaging Methods pop-up window.

\$CARSPATH/modules/finaid/progscr/faentry

Tables/Records: pkg_table

parms

Contains the Financial Aid Entry Program Parameters screen.

\$CARSPATH/modules/finaid/progscr/faentry

pkgobj

Contains the Packaging Objectives screen.

\$CARSPATH/src/finaid/faentry/SCR

Tables/Records: faneed_rec, faschd_table, id_rec, stufa_rec

stathelp

Contains the Financial Aid Statuses Help screen.

\$CARSPATH/src/finaid/faentry/SCR

svc

Contains the Support Services detail window.

\$CARSPATH/modules/Lib/progscr/libentry

Forms Files and Table/Record Usage

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

anform

Contains a sample Financial Aid Award Letter form.

\$CARSPATH/modules/finaid/forms/faentry

Tables/Records: fa_item_table, id_rec

awdtst

Contains a sample Financial Aid Award Letter form.

\$CARSPATH/modules/finaid/forms/faentry

Tables/Records: id_rec

fatran

Contains the Financial Aid Transcript form.

\$CARSPATH/modules/finaid/forms/faentry

Tables/Records: faload_rec, fatran_rec, id_rec

l_anfi

Contains a sample Financial Aid Award Letter form.

\$CARSPATH/modules/finaid/forms/faentry

Tables/Records: id_rec

Satisfactory Academic Progress

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

Parameter Syntax

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

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

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

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

Parameters

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

-A

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

Example: fasap -r SAPACTN -t FY12 -y 1213 -T finaid -Y 2012 -s fa12 -Y 2012 -s sp13 -c APYE -A

-c compliance criteria code

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

Example: fasap -r SAPACTN -t FY12 -c APYE -y 1213 -s fa12 -Y 2013 -T finaid

-f SAP fail

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

Example: fasap -r SAPACTN -t FY12 -y 1213 -Y 2012 -s fa12 -Y 2013 -s sp13 -c APYE -f *code* -T finaid

-L site

Optional – Specifies your site.

Example: fasap -r SAPACTN -t FY12 -c APYE -y 1213 -s fa12 -T finaid -Y 2012 -L *main*

-P prog

Optional – Specifies the program (e.g., undg for Undergraduate)

Example: fasap -r SAPACTN -t FY12 -y 1213 -Y 2012 -s fa12 -Y 2012 -s sp13 -c APYE -P *undg* -T finaid

-p SAP pass

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

Example: fasap -r SAPACTN -t FY12 -y 1213 -Y 2012 -s fa12 -Y
2013 -s sp13 -c APYE -p *code* -T finaid

-r resource

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

Example: fasap -r SAPACTN -t FY12-c APYE -y 1213 -s fa12 -Y
2012 -T finaid

-s session

Required – Specifies the session for checking satisfactory academic progress.

Example: fasap -r SAPACTN -t FY12 -c APYE -y 1213 -s fa12 -Y
2012 -T finaid

-t tickler

Required – Specifies the tickler value (e.g., FY11) of the contact used to select students.

Example: fasap -r SAPACTN -t FY12 -c APYE -y 1213 -s fa12 -Y
2012 -T finaid

-T track

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

Example: fasap -r SAPACTN -t FY12-c APYE -y 1213 -s fa12 -Y
2012 -T finaid

-y fayr

Required – Specifies the Financial Aid Award Year code (e.g., 1213).

Example: fasap -r SAPACTN -t FY12 -c APYE -y 1213 -s fa12 -Y
2012 -T finaid

-Y year

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

Example: fasap -r SAPACTN -t FY12 -c APYE -y 1213 -s fa12 -T
finaid -Y 2012



Financial Aid Need Analysis

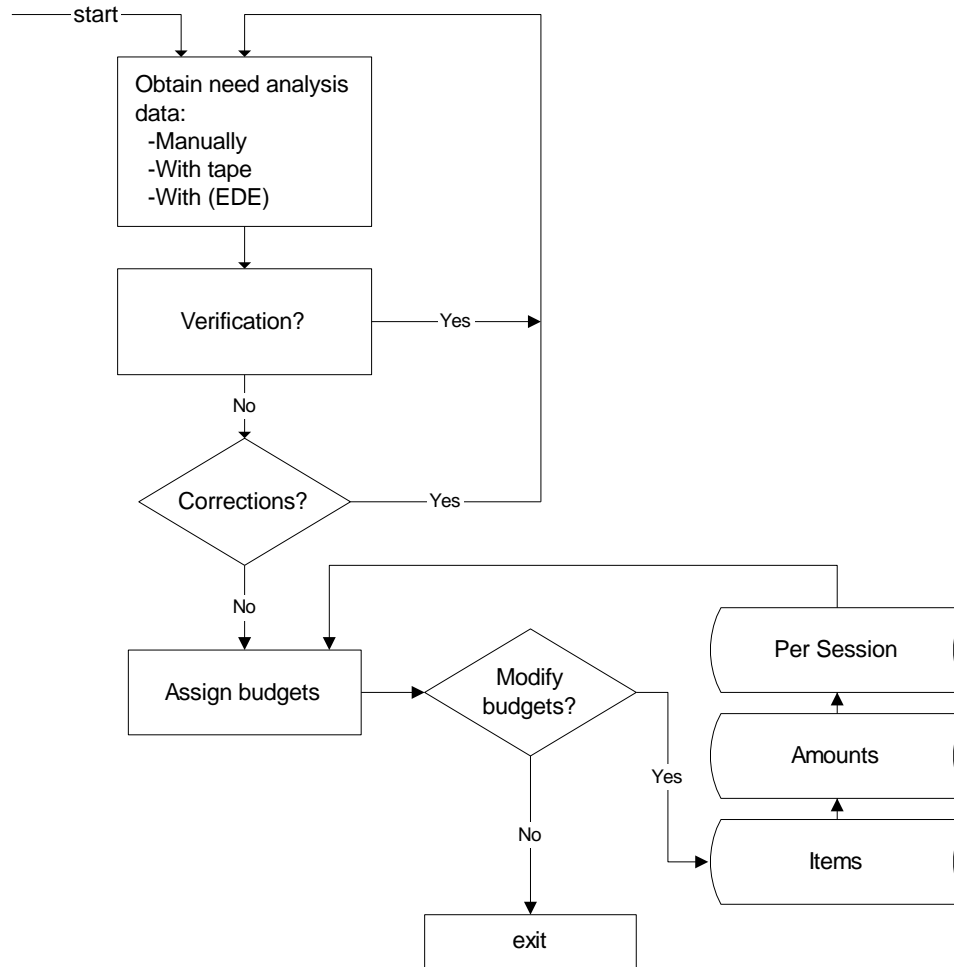
This section provides reference information about the Financial Aid Need Analysis program. The Financial Aid Need Analysis program allows you to enter and maintain financial aid need analysis information.

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

- Process flow
- Parameters
- Program screens

Process Flow

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



Data Flow Description

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

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

Financial Aid Need Analysis Parameters

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

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

Parameter Syntax

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

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

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

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

Parameters

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

-c background

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

Example: faneed -y 1213 -c

-f

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

Example: faneed -y 1213 -f < file

-i ID range

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

Example: faneed -y 1213 -i 101 2309

-l ledger

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

Example: faneed -y 1213 -l S/A

-L site

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

Example: faneed -y 1213 -L main

-m method

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

Example: faneed -y 1213 -m fm

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

-o output

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

Example: faneed -y 1213 -o GES

-O output

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

Example: faneed -y 1213 -O GES

-p program

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

Example: faneed -y 1213 -p faentry

-s session

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

Example: faneed -y 1213 -s FA12

-y fayr

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

Example: faneed -y 1213

Program Screens

Financial Aid Need Analysis has 20 screens and 20 forms for performing the following interactive functions:

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

Access

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

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

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

- \$CARSPATH/modules/finaid/forms/faneed
- \$CARSPATH/modules/finaid/progscr/1213

Note Financial Aid product forms are located in the \$CARSPATH/modules/finaid/progscr directory in subdirectories that pertain to the financial aid award year. The 1213 directory contains the most current versions of the forms.

Screen Files and Table/Record Usage

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

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

adm

Contains display-only Admission record information.

\$CARSPATH/modules/Lib/progscr/libentry

bgt

Contains the upper portion of the Financial Aid Budgeting screen.

\$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fabgt_rec, fabgt_table, fameth_table, id_rec

bgtctl

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

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: fa_item_table, fabgtctl_rec

copy

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

\$CARSPATH/src/finaid/faneed/SCR

esartran

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

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: esar_rec, esar0809_rec, ...esar1213_rec

faedit

Contains the Assumption screen.

\$CARSPATH/src/finaid/faneed/SCR

Contains the Site Record screen.

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: site_rec

need

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

Field value	Scroll group name
student asset	sa
student income	si
other resource 1	o1
other resource 2	o2

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: fabgt_table, faneed_rec, id_rec, naf_rec, naf0809_rec, ...naf1213_rec, stufa_rec

need2

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

Field value	Scroll group name
student asset	sa
student income	si
other resource 1	o1
other resource 2	o2

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: bgtgrp_table, fabgt_table, faneed_rec, id_rec, immeth_table, naf_rec, naf0809_rec, ...naf1213_rec, stufa_rec

norec

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

\$CARSPATH/modules/finaid/progscr/faneed

param

Contains the Need Analysis Program Parameters screen.

\$CARSPATH/src/finaid/faneed/SCR

profile

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

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: profile_rec

progenr

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

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: prog_enr_rec

reject

Displays U.S.E.D. Reject Codes And Reasons screen with explanations of rejection codes.

\$CARSPATH/src/Libapp/Libfa/SCR

rtfc

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

\$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fameth_table, fana_rec, id_rec, stufa_rec

stuacad

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

\$CARSPATH/modules/finaid/progscr/faneed

Tables/Records: stu_acad_rec

stuserv

Contains display-only Student Services record information.

\$CARSPATH/modules/Lib/progscr/libentry

stustat

Contains display-only Student Statistics record information.

\$CARSPATH/modules/Lib/progscr/libentry

tfc1

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

\$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fameth_table, fana_rec, id_rec, naf_rec, naf0809_rec, ...naf1213_rec

tfc2

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

\$CARSPATH/src/finaid/faneed/SCR

Tables/Records: fameth_table, fana_rec, id_rec, naf_rec, naf0809_rec, ...naf1213_rec

Form Files and Table/Record Usage

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

Note Several form files used in prior years also appear in the Financial Aid Need Analysis forms directories. These files are not listed below.

1213esar

Contains the 2012-2013 Unofficial Institutional Student Information Report form (formerly, the Electronic Student Aid Report form).

\$CARSPATH/modules/finaid/forms/faneed

Tables/Records: fameth_table, fana_rec, faneed_rec, id_rec, naf_rec (naf1213_rec), nslds_rec (nslds1213_rec), stufa_rec

1213nslds

Contains the 2012-2013 Unofficial National Student Loan Data sheet.

\$CARSPATH/modules/finaid/forms/faneed

Tables/Records: naf_rec (naf1213_rec), nslds_rec (nslds1213_rec), nsldsprog_rec

Application Form Files, Tables, and Records for 2011-2012

The Financial Aid Application form files for the 2011-2012 financial aid award year appear in the following files and use the indicated tables and records. Note that similar form files exist for previous financial aid years in directories named appropriately for their years.

afsa1 through afsa9

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

\$CARSPATH/modules/finaid/progscr/1213

Tables/Records: id_rec, naf_rec (naf1213_rec)

im1 through im6

Contain the screens for Institutional Methodology need analysis information.

\$CARSPATH/modules/finaid/progscr/1213

Tables/Records: id_rec, naf_rec (naf1213_rec)

sim1 through sim4

Contains the screens for Need Analysis Simulation for student data .

\$CARSPATH/modules/finaid/progscr/1213

Tables/Records: id_rec, naf_rec (naf1213_rec), stufa_rec

ver1 through ver5

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

\$CARSPATH/modules/finaid/progscr/1213

Tables/Records: fm_rec, id_rec, naf_rec (naf1213_rec)



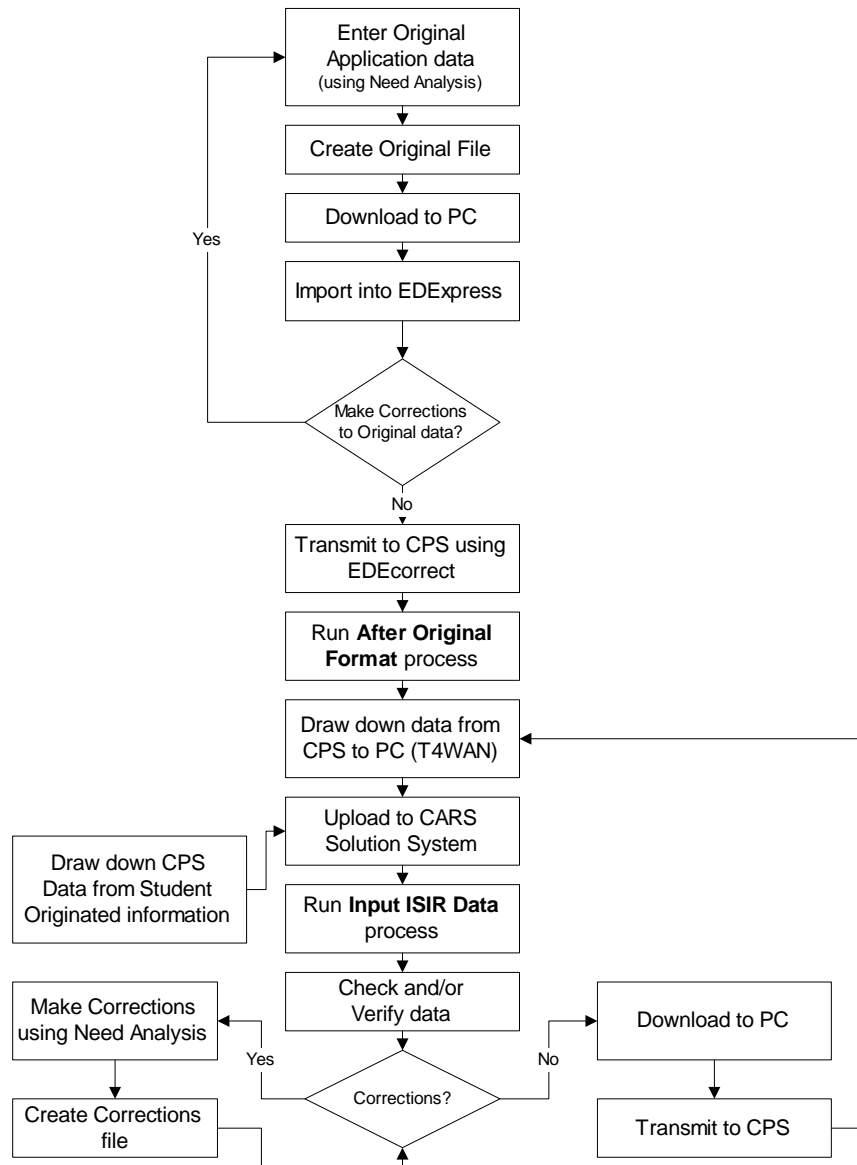
Electronic Data Exchange

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

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

EDE Process Flow

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



Data Flow Description

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

- Download files
- Upload files
- Transaction log

- Processing to create original and correction applications
- 1. Prior to running the EDE process, the user creates need analysis information for a student using Financial Aid Need Analysis.
- 2. The user creates the following files using the following Financial Aid: EDE Processing Menu options:
 - o Create Corrections File to create: `corr11in.dat` for the 2011-2012 school year
 - o Create Orig. Appl. File to create: `eaps11in.dat` for the 2011-2012 school year
- 3. The user downloads the above files to a PC using the *pcxmit* program.
- 4. The user makes corrections to the original data, as necessary.
- 5. Using the GES software, the user transmits the above files to the Central Processing Services (CPS) agency.
- 6. Using the GES software, the user retrieves the processed need analysis data from the CPS. The CPS returns the need analysis information in various files. These files are named according to the convention <prefix>XXop.xxx

The possible prefixes are as follows:

- o `isrf11op` (ISIR Data – Requested)
- o `idap11op` (ISIR Data – Daily Applications)
- o `idsa11op` (ISIR Data – Daily Automatic)
- o `idre11op` (ISIR Data – Daily State Resident)
- o `idnr11op` (ISIR Data – Daily State Non-Resident)
- o `igco11op` (ISIR Data – CPS Corrections)
- o `igsa11op` (ISIR Data – CPS Pushed Automatic)
- o `igsg11op` (ISIR Data – CPS Pushed System Generated)
- o `igre11op` (ISIR Data – CPS Pushed State Resident)
- o `ignr11op` (ISIR Data – CPS Pushed State Non-Resident)
- o `igaa11op` (CPS Pushed ISIRs – ACG Data Only Correction)

An example of such a file name is **idap11op.dat**. According to this naming convention, XX refers to the current year, and xxx refers to the Department of Education-assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

- 7. The user uploads the above files to CX using *pcxmit*.
- 8. The user runs the *esarin* script, accessed from the Financial Aid: EDE Processing menu: Input ISIR Data option. The script reads the .dat, 001, 002, etc. files into the CX database, adds a .run extension, and renames the CPS-returned files in the following manner:
 - o <prefix>0Xop.xxx.....<prefix>0Xop.xxx.run
- 9. The user makes corrections to the uploaded files as necessary.
 - o If corrections are required, the user uses Need Analysis and creates a Corrections file. The user then transmits the file to the CPS.

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

Download Files Stored in the *pcfin* Directory

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

corr00in.dat

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

pgoryyin

The Pell file to be transmitted to the PC and CPS, created by the Pell COD process to report Pell payment origination information.

pgdryyin

The Pell file to be transmitted to the PC and CPS, created by the Pell process to report Pell payment disbursement information.

eaps00in.dat

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

Upload Files Stored in the *pcfin* Directory

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

- isrf11op (ISIR Data – Requested)
- idap11op (ISIR Data – Daily Applications)
- idsa11op (ISIR Data – Daily Automatic)
- idre11op (ISIR Data – Daily State Resident)
- idnr11op (ISIR Data – Daily State Non-Resident)
- igco11op (ISIR Data – CPS Corrections)
- igsa11op (ISIR Data – CPS Pushed Automatic)
- igsg11op (ISIR Data – CPS Pushed System Generated)
- igre11op (ISIR Data – CPS Pushed State Resident)
- ignr11op (ISIR Data – CPS Pushed State Non-Resident)
- igaa11op (CPS Pushed ISIRs – ACG Data Only Correction)

Transaction Log

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

Marking GES Data for Export

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

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



COD Processing

This section provides reference information about COD processing, which allows institutions to obtain, change, and report federal student aid application data and Pell Grant payment data electronically.

The Common Origination and Disbursement System was implemented in April 2002 by the Office of Federal Student Aid (FSA). COD has re-engineered the former process of delivering and reporting Federal Pell Grants and Direct Loans from two processes into one Common Origination and Disbursement Process. COD provides a common process and an integrated system that enables efficient delivery of Title IV Funds.

COD Full Participant

A Full Participant uses the Common Record in XML format to submit data to the COD System.

COD processing is separate and distinct from the CX Electronic Data Exchange process.

Program Features Detailed

This section contains details about the following features of COD processing:

- Process flows
- Parameters
- Program screens and windows

Access

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

- rfms/
- rfmsentry/

Pell Program Process

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

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

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

Export COD Batch exports an original Pell record (*edepell_rec*) when the record's *edepell_rec.act_code* field is set to R.

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

When unable to add or update a Pell record for a student due to errors, the *rfms* program sends mail to the user indicating why a Pell record could not be added or updated.

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

Pell Program Edit Check

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

Pell Program Calculations

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

Remaining Amount to be Paid Calculation for Original Pell records

The calculation process used by the *rfms* program to calculate the remaining amount to be paid to date follows:

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

3. The program then subtracts the Amount Paid To Date (edepell_rec.amt_paid) from the total of the aid_rec.amt values. The result is the Remaining Amount to Be Paid (edepell_rec.remaining_amt).

Remaining Amount to be Paid Calculation for Disbursement records

The calculation process used by the Disbursement program to calculate the remaining amount to be paid to date follows:

1. The program loads all corresponding Academic Calendar records (acad_cal_rec) to determine the beginning date for the financial aid year and sorts the selected Financial Aid records accordingly.
2. For each Pell record selected, the program loads all corresponding Aid records (aid_rec) in which the following fields contain the following values:
 - *aid_rec.fa_yr* – contains a value that matches the indicated financial aid year
 - *aid_rec.id* – contains a value that matches the student ID of the Pell record (edepell_rec)
 - *aid_rec.aid* – contains a value that matches the aid in the Aid table (aid_table)
 - *aid_rec.amt_stat* contains a value of "AA", "AD", or "AP"
 - *aid_rec.stat* – does not contain a value of "S", "N", or "R"
 - *aid_table.pell_code* – contains a value of "Y"
 - *acad_cal_rec.prog* – contains a value that matches the program in the Academic Calendar record (acad_cal_rec)
 - *acad_cal_rec.yr* – contains a value that matches the year in the Academic Calendar record (acad_cal_rec)
 - *acad_cal_rec.ssess* – contains a value that matches the session in the Academic Calendar record (acad_cal_rec)
 - *acad_cal_rec.subsess* – contains a value that matches the subsession in the Academic Calendar record (acad_cal_rec)
 - *acad_cal_rec.beg_date* – contains a value that matches the beginning date in the Academic Calendar record (acad_cal_rec)
 - *aid_code* – contains a value that matches a Pell code
3. The program then subtracts the total amount disbursed from the total of the aid_rec.amt values. The result is the Remaining Amount to Be Paid.

Creating Pell Disbursements from Partial Aid Records

If a Pell award has Partial Aid Records defined, Disbursements are created for each Partial Aid Record. The Pell Disbursement's Amount and Date are copied from the Partial Aid Record.



Financial Aid Loan Program

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

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

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

- Process flow
- Parameters
- Program screens and windows
- Direct Lending

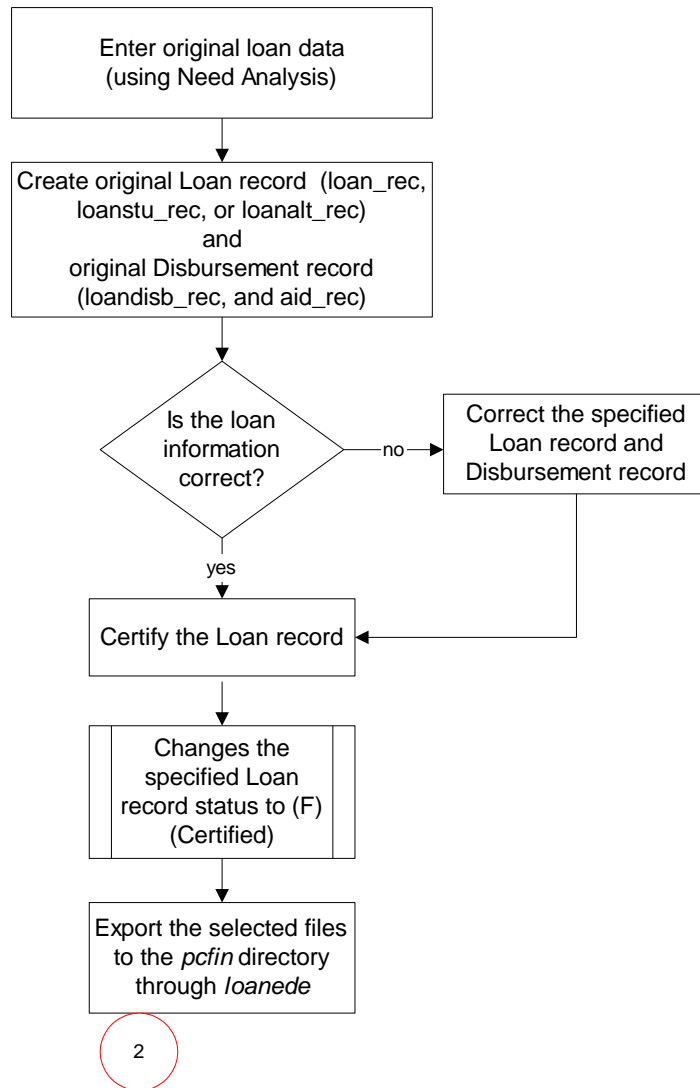
Access

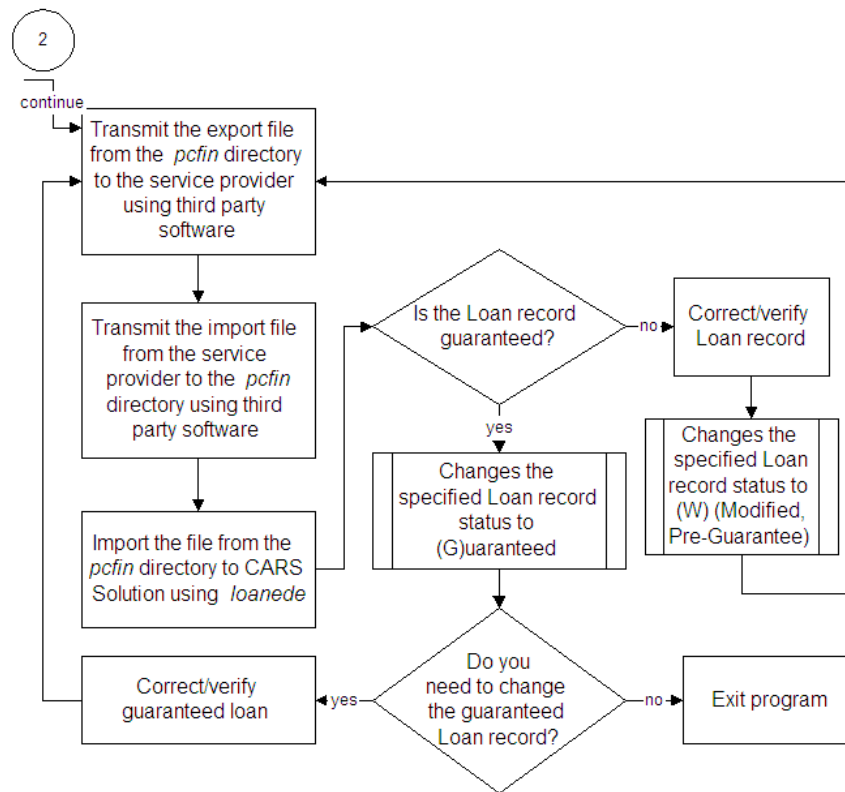
The program files for Loan processes are located in the following subdirectories paths under \$CARSPATH/src/finaid:

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

Process Flow

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





Data Flow Description

The following describes the data flow in the Loan processes and describes the features used to process loan data, including the following:

- Export files
 - Import files
 - Processing to create originations and disbursement applications
 - Processing to create Change Transaction files.
1. Prior to running the Financial Aid Loan process, the user creates need analysis information for a student using Financial Aid Need Analysis.
 2. The user uses the *loans* program to create the following Loan records for students:
 - o Stafford Loan records (*loan_rec*)
 - o PLUS Loan records (*loanstu_rec*)
 - o Alternative Loan records (*loanalt_rec*)
 3. The user creates a Loan Disbursement records (*loandisb_rec*) using the **Disbursements** command from the selected Financial Aid Loan screen.
 - o If your institution sends and receives disbursement information via electronic fund transfer (EFT), the disbursement amount and date are entered automatically.

- To send and receive disbursements via EFT, you must load the financial table entries to support the posting of EFT roster files.
- 4. The user certifies all Loan records and Loan Disbursement records using the **Certify** command from the selected Financial Aid Loan screen. This changes the Status field to F (Certified) and marks the record for export to the service provider.
- 5. The user creates the following files using the *loanede* program from the Loan Tracking Main Menu: Export Loans option to export the certified Loan records to the *pcfin* directory:
 - Original Applications (CommonLine): lcYYop.xxx for the current school year
 - Change Transactions (CommonLine): ccYYop.xxx for the current school year

In the filenames above, YY refers to the current year (e.g., 11 for 2011-2012), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

This changes the Loan record Status field to X (Exported).

- 6. The user uses third party software to transmit the Loan Export file from the *pcfin* directory to the service provider.
- 7. The service provider assigns each Loan record with a status of guaranteed, incomplete, or denied and sends the files back to your institution.
- 8. Using third party software, the user retrieves the processed original and/or disbursement data from the service provider. The service provider returns the original and/or disbursement information via the following files:
 - Original acknowledgement response file (CommonLine): acYY.xxx for the current school year
 - Disbursement roster file (CommonLine): drYY.xxx for the current school year

In the filenames above, YY refers to the current year (e.g., 11 for 2011-2012), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

- 9. The user imports the above files to CX using the *loanede* program from the Financial Aid: Loan Tracking Main menu: Import Loans option. The imported Loan records will have a status of B (Guaranteed, disbursable), G (Guaranteed), I (Incomplete), or D (Denied). The *loanede* program reads the .dat, 001, 002, etc. files into the CX database, adds a .run extension, and renames the service provider-returned files in the following manner:
 - acYY.xxx.....acYY.xxx.run
 - drYY.xxx..... drYY.xxx.run

In the filenames above, YY refers to the current year (e.g., 11 for 2011-2012), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

- 10. The user makes corrections to the imported files as necessary and then exports these records as a Change Transaction file to the service provider.

To make corrections to Loan records and/or Disbursement records that have been imported from the service provider, you must rename the .run files back to the acknowledgement filename (e.g., acYY.xxx for Original Application files and drYY.xxx for Disbursement Roster files). The YY refers to the current year (e.g., 11 for 2011-2012), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

Export Files Stored in the *pcfin* Directory

The following lists the CommonLine export files that the Financial Aid Loan process stores in the *pcfin* home directory.

lcYYop.xxx

The origination file to be transmitted to the PC and the service provider using third party software.

ccYYop.xxx

The change transaction file to be transmitted to the PC and the service provider using third party software.

In the filenames above, YY refers to the current year (e.g., 11 for 2011-2012), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

Import Files Stored in the *pcfin* Directory

The following lists the CommonLine import files that the Financial Aid Loan process stores in the *pcfin* home directory.

acYY.xxx

The origination acknowledgement response files imported from the service provider to the PC, using third party software, and then to CX.

drYYop.xxx

The disbursement roster files imported from the service provider to the PC, using third party software, and then to CX.

In the filenames above, YY refers to the current year (e.g., 11 for 2011-2012), and xxx refers to the assigned sequence number. The first assigned filename is .dat. The remaining files are assigned a sequence number (e.g., .001, .002, etc.).

Marking Loan Data for Export

The *Loanede* program enables you to send original loan applications and change request applications to a PC to input to third party software. The third party software sends the information to the service provider for processing. *Loanede* program allows the user to *mark* a record for export and indicates that the record is to be formatted into a file compatible with the third party software.

You perform above actions when creating original or correction files in the *Loans* program.

Tables and Records Used For Financial Aid Loan Tracking

The Financial Aid Loan Tracking (*loans*) program uses the following Common, Registration, and Financial Aid tables and records.

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

Common tables and records

- ctc_rec
- doc_table

Financial tables and records

- subt_rec
- vch_rec
- ent_table
- subs_table

Financial Aid tables and records

- aid_rec
- loanbatch_rec
- aid_table

Financial Aid Loan Parameters

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

Note You also can specify compilation values using the includes for the Financial Aid product that affect the Financial Aid Loan program.

Parameter Syntax

You can display Financial Aid Loan parameters by entering the following: **loans -;**

The following is the correct usage for running the *loans* program:

loans – program [-p] [-r] [-L *site*]

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

Parameters

The following lists the parameters for running Financial Aid Loan.

-L

Optional – Specifies the site in which you are running Financial Aid Loan, where *site* represents the code you specify.

Example: Loans -L Main

-p

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

Example: Loans -p UNDG

-r

Display only – Specifies whether to disable Update mode in the Financial Aid Loan process.

Post Loans to Student Account Parameter Syntax

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

The following is the correct usage for running the *loanpost* program:

**loanpost – [-P sessions] [-b bal code] [-e ent type] -f aid year [-j journal]
[-n doc station] [-o output] [-p program] [-s stu subs] [-S EFT subs]
[-C doc code] [-D debug] [-E posting date]**

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

Parameters

The following lists the parameters for running *loanpost*.

-b

Optional – Specifies the Student Subsidiary Balance code where *subsidiary balance* represents the code you specify.

-C

Optional – Specifies the EFT Document code where *document* represents the code you specify.

-D

Optional – Specifies the level of debug messages to be displayed, where *debug_level* represents the message level (1,3,5,7,9). To receive more messages, you must specify a high level.

-e

Optional – Specifies the Entry Type code to post EFT reimbursements where *entry type* represents the code you specify.

-E

Optional – Specifies the effective posting date (mm/dd/yyyy) of the journal to be posted.

-f

Required – Specifies the financial aid award year in which you are running Financial Aid Loan.

-j

Optional – Specifies the EFT Journal code to post EFT disbursements where *journal reference* represents the code you specify.

- n**
Specifies the number of the EFT station number used to enter and process financial aid loans. The number is used for document control, and the default is 1.
- o**
Optional – Specifies the destination, including a printer, a file, or more for screen output.
- p**
Optional – Specifies the Program code for which you are running Financial Aid Loan, where *program* represents the code you specify.
- P**
Optional – Specifies the Session codes for which you are running Financial Aid Loan, where *sessions* represents the code you specify. Up to four Session codes, separated by commas, can be processed at a time.
- s**
Optional – Specifies the Student Subsidiary code for which you are running Financial Aid Loan, where *student account subsidiary* represents the code you specify.
- S**
Optional – Specifies the EFT Subsidiary code in which EFT rosters are posted, where *EFT subsidiary* represents the code you specify.

Loan Import, Export, and Reimport Parameter Syntax

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

The following is the correct usage for running the *loanede* program:

loanede – [-c changes] -d import/export [-e ent type] -f aid year [-u unique ID] [-j journal] [-n doc station] [-o orig files] [-p program] [-r reprocess] [-s subs] [-x external] [-C doc code] [-D disb files] [-E posting date] [-L site] [-T trace]

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

Parameters

The following lists the parameters for running *loanede*.

- c**
Optional – Specifies the change transaction export files.
- C**
Optional – Specifies the EFT Document code where *document* represents the code you specify.
- d**
Required – Specifies import or export files.
- D**
Optional – Specifies the disbursement roster import files.

-e	Optional – Specifies the Entry Type code to post EFT reimbursements where <i>entry type</i> represents the code you specify.
-E	Optional – Specifies the effective posting date of the journal to be posted.
-f	Required – Specifies the financial aid award year in which you are running Financial Aid Loan.
-j	Optional – Specifies the EFT Journal code to post EFT disbursements where <i>journal reference</i> represents the code you specify.
-L	Optional – Specifies the site from which you are exporting Loan records, where <i>site</i> represents the code you specify.
-n	Specifies the number of the EFT station number used to import financial aid loans. The number is used for document control, and the default is 1.
-o	Optional – Specifies the import original response files.
-p	Optional – Specifies the Academic Program code for which you export Loan records, where <i>program</i> represents the code you specify.
-r	Optional – Specifies the re-process data files.
-s	Optional – Specifies the Student Subsidiary code for which you import Loan records, where <i>student account subsidiary</i> represents the code you specify.
-T	Optional – Specifies the trace SQL output.
-u	Optional – Specifies the unique ID for which you re-import Loan records.
-x	Optional – Specifies external loan files.

Program Screens and Windows

Financial Aid Loan has ten screens and two windows for performing the following interactive functions:

- Entering/updating Financial Aid Loan records
- Entering/updating Financial Aid Loan Disbursement records
- Tracking Financial Aid Loan records
- Modifying Change Transaction files

Access

The screen and window files for Financial Aid Loan are located in the following directory path:

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

Note You can access windows from each program screen in Financial Aid Loan.

See the *CX System Technical Reference* for information about common windows that appear in Financial Aid Loan.

Screen Files and Table/Record Usage

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

alt1

Contains the first Alternative Loan screen.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- faschd_table
- gradelvl_table
- lender_table
- loan_rec
- loanalt_rec
- loanorig_table
- loanprd_table
- loanstat_table
- loantype_table
- st_table

alt2

Contains the second Alternative Loan screen.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- gradelvl_table
- loan_rec
- loanalt_rec
- loanorig_table
- loanprd_table
- loantype_table
- st_table

disb

Contains the Financial Aid Loan Disbursement window.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- aid_rec
- aid_table
- disbstat_table
- loandisb_rec

disbchg

Contains the Financial Aid Loan Change Disbursement window.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- aid_rec
- loandisb_rec

loan1

Contains the first Stafford Loan screen.

Note This screen is not available after the 1999-2000 financial aid award year. For Stafford Loan records for the 2000-2001 financial aid award year and beyond, see the *mpn* screen in this section.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- faschd_table
- gradelvl_table
- lender_table
- loan_rec
- loanguar_table
- loanorig_table
- loanprd_table
- loanstat_table
- loantype_table
- st_table

loan2

Contains the second Stafford Loan screen.

Note This screen is not available after the 1999-2000 financial aid award year. For Stafford Loan records for the 2000-2001 financial aid award year and beyond, see the *mpn* screen in this section.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- gradelvl_table

- loan_rec
- loanorig_table
- loanprd_table
- loanstu_rec
- loantype_table
- st_table

loanchg

Display only – contains the Loan Change Record screen.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- loanchg_rec
- loanchg_table

loanstat

Display only – contains the Loan Tracking Entry (History) window.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- loanstat_rec
- loanstat_table

main

Display only – contains the Loan Summary screen.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- loan_rec
- loanstat_table
- loantype_table

mpn

Contains the first MPN Loans screen.

Note Use this screen for Stafford Loan records created for the 2000-2001 financial aid award year and beyond. To view Stafford Loan records created prior to 2000-2001, see the *loan1* and *loan2* screens in this section.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- acad_cal_rec
- faschd_table
- gradelvl_table
- lender_table
- loan_rec
- loanguar_table
- loanorig_table
- loanprd_table

- loanstat_table
- loantype_table
- st_table

relation

Contains the Relationship screen.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- id_rec

stu

Display only – contains the header section of every Loan Tracking screen.

\$CARSPATH/modules/finaid/progscr/Libloan

Tables/Records:

- id_rec
- prog_enr_rec

Supporting Loan Program

The Financial Aid Convert Loan program (*facvtln*) is an additional Financial Aid loan program that is used to create loans for either a single student or for all students in a specific award year. When run for all students, it operates as a batch process.

Creating Loans for One Student

For a single student, the menu option Create Loans by ID executes the *facvtln* program with the passed parameter of a student ID. The menu option exists on the Financial Aid: Loan Tracking menu.

Creating Loans for All Students

To create loans for all students, you must use the command line. The following usage message pertains to arguments for the *facvtln* program:

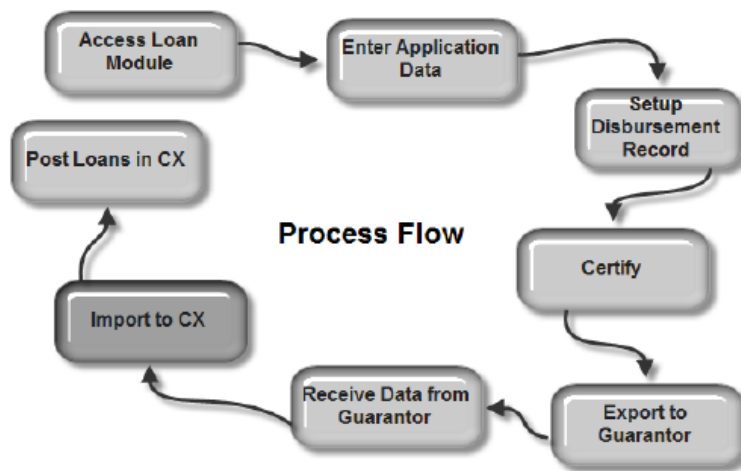
```
Usage: facvtln -i Student ID -y fayr -m method -Y year -p prog -s session
        -S site -P loan_prd

where: Student ID : Student ID or (0) for all students.
fayr: financial aid year
method: method to process
year: year to process up to
prog: program to process
session: session to process up to
site: site to be used.
loan_prd: Loan period
```

All the arguments are required.

Using the Loan Module for Direct Lending

The following process flow diagram outlines the primary steps involved in processing and tracking student loans in the Financial Aid Loan Module. First, you must access the loan module from either the menu or the FAENTRY program. You then enter the data from the Loan application to create the following Loan records: Stafford Loan, PLUS Loan, and any Alternative Loans.



Creating the Loan Records

The most practical way to create loan information is by using the “Auto Loan Create” feature available in FAENTRY. It can be turned on by entering the “Loan Period” and setting the “Auto Loan Creation” flag to “Y”.

The requirement for using “Auto Loan Create” is that you set up the entries for FALOAN in the Decision Processor, create loan periods in the Loan Period Table, and set up disbursement dates in the Loan Disbursement Table. When you create your loan records using “Auto Loan Create,” the program will use the values you have chosen in the Decision Processor to create the data in your loan records. This way, you do not have to look up the information to enter it in the Loan Record. Your disbursement records are also created for you.

Another way this feature is used is to create the aid in FAENTRY with the “Auto Loan Creation” flag set to “N”. When it is determined that you need to originate the loan for a student using the aid record you added to the student’s awards, use the “Create Loans by ID” option on the Loan Tracking menu.

Enter the ID#(s) of the student(s) you want to create loan records for and run the program. Keep in mind that the Stafford and Unsubsidized Stafford loans should require only one entry per student per award year. PLUS loans typically require one loan record entry per year, but in situations where both parents take out a PLUS loan, you need to have two separate PLUS loan award codes.

Note You may make changes to the loan at any time while the loan data is in the “Entered on CX” phase. You can increase, decrease, and even terminate a loan. Once you have Certified and Exported the loan information, however, you must take a different approach to make any changes.

COD Loan Codes

Seq.	Loan Status * = most common	Loan Status Type	Disbursement Status
10	E - Entered on CX*	a - active	E - Generated disbursements
15	T - Terminated record*	i - inactive	T - Terminated
20	F - Ready to transmit	a - active	
20	U - Corrected on CX*	a - active	
30	X - Exported from CX	a - active	
40	A - Accepted by COD	a - active	
40	C - Corrected	a - active	
40	R - Rejected by COD	a - active	
80	V - Released to student	a - active	V - Released to student
100	Z - Completed	a - active	

At this point, the loan status will read “E – Entered on CX.”

Certifying the Loan Records

Until you certify a loan, the data remains in CX and will not export when you run the “Export COD Batch” option on the Loan Tracking/COD menu.

Do the following to run the certify process:

1. Verify that you are looking at the loan record you want to certify.
2. Check the data to make sure it is as complete as possible.
3. Choose the **cerTify** option on the menu at the top of the screen. This process will highlight several items that you need to double check before it completes the Certification process.
4. Press **Execute** until all of the screens have been completed and the comment at the bottom states, “Loan Certified”.

Once the certify step is completed, the loan information will export on the “Export COD Batch” after you click to run that process. If there are any issues with data in the loans set to export, the information will be sent to you in an email.

Note Once you have certified a loan, it is more difficult to update any information related to a loan. You still have an opportunity to make changes before exporting. Once you have exported, you must wait for a response to your loan request.

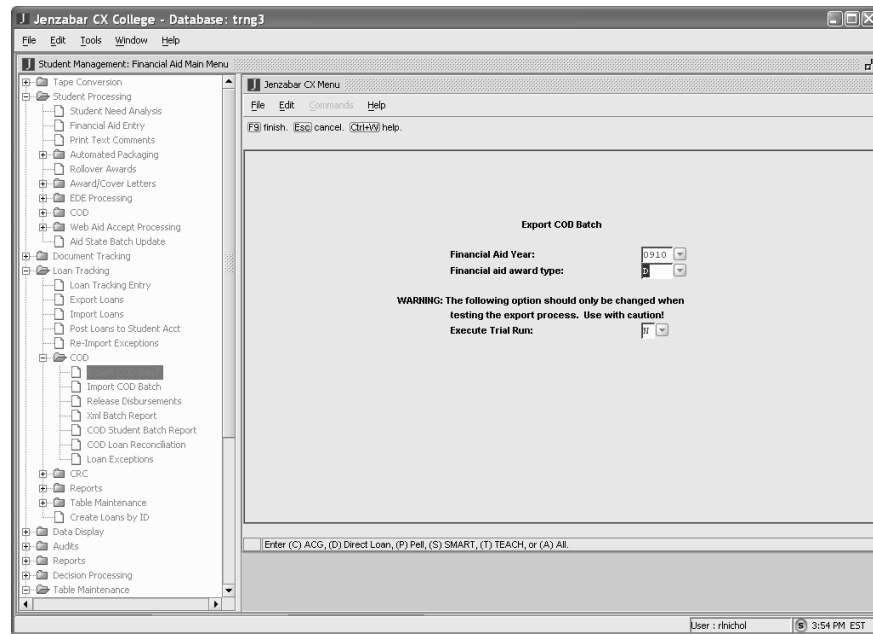
COD Loan Codes

Seq.	Loan Status * = most common	Loan Status Type	Disbursement Status
10	E - Entered on CX*	a - active	E - Generated disbursements
15	T - Terminated record*	i - inactive	T - Terminated
20	F - Ready to transmit	a - active	
20	U - Corrected on CX*	a - active	
30	X - Exported from CX	a - active	
40	A - Accepted by COD	a - active	
40	C - Corrected	a - active	
40	R - Rejected by COD	a - active	
80	V - Released to student	a - active	V - Released to student
100	Z - Completed	a - active	

At this point, once certified, the loan status is “F – Ready to Transmit.”

Exporting the Loan Record Data

Now that the student’s loan has been certified, it is ready for export. To create the export file in CX, you must use the options on the COD menu under the Loan Tracking menu. To export any files for COD Direct Lending, use the “Export COD Batch” option on the COD menu. Be sure to choose “D” for the “Financial Aid award type” to ensure that only Direct Lending data will be included in the output.



A file will be created in the same directory that you use for your ISIR files.

Note Some schools send this file to a directory other than ‘pcfin’, but basically it goes to the location that has been defined for it in the \$CARSPATH/macros/custom/student file.

Once you have created the file, you need to upload the file to EDCONNECT. Then you must wait until you receive a response from COD before making any changes. This response should come within a few hours.

COD Loan Codes

Seq.	Loan Status * = most common	Loan Status Type	Disbursement Status
10	E - Entered on CX*	a - active	E - Generated disbursements
15	T - Terminated record*	i - inactive	T - Terminated
20	F – Ready to transmit	a - active	
20	U – Corrected on CX*	a - active	
30	X – Exported from CX	a - active	
40	A – Accepted by COD	a - active	
40	C - Corrected	a - active	
40	R – Rejected by COD	a - active	
80	V – Released to student	a - active	V - Released to student
100	Z - Completed	a - active	

Once exported, the loan status will at this point read “X – Exported from CX”.

Importing Loan Record Data

Within a few hours of loading the loan request data into EDCONNECT, you should be able to download the response(s) to your loan requests (usually by the next day). Choose files that start with the prefixes shown in the table below and move them to your 'pcfin' directory.

These files have a naming convention of four characters at the beginning, the award year, then an 'op' or 'bk' and a period followed by a number. For example, the crdl file would be created as 'crdlXXop.001'. The 'XX' indicates the last digits of the award year, for example, for award year 2011-2012, replace the 'XX' with '12.' The '001' would increment each time a new file is created.

Name	Definition
CRDLXXOP	Responses sent from COD System to school for Direct Loan data received in the CRDLMYIN message class
CRBNXXOP	Booking Notification
CRCOXXOP	Credit Decision Override
CRNDXXOP	Negative Disbursement
CRPSXXOP	Payment to Servicing
CRPNXXOP	MPN Response
CRWBXXOP	Responses for activity performed on the COD web site for the award year
CRRCXXOP	Receipts sent from COD System to school for the incoming message classes CRAAXXIN, CRPGXXIN, CRDLXXIN, CRAGXXIN, CRSGXXIN, or CRTHXXIN
CRAAXXOP	Common Record Documents containing data from any program
CRECXXOP	Entrance Counseling
CRSPXXOP	PLUS Application Acknowledgement

Each of these files has a specific purpose and should be downloaded to CX.

Run the "Import COD Batch" option found on the COD menu under the Loan Tracking menu. This process imports the responses from COD for your loan requests. Any issues encountered during the import process will show up in your email.

Disbursing Direct Lending Funds

After you have completed the import of the file, you may run the "Post Financial Aid" option to post the approved loan amounts to the student accounts. The "Post Financial Aid" process will again check the compliance rules (Required for Disbursement flag set to "Y") and determine whether the student still meets compliance for posting.

Making Changes to Loan Records

There are many reasons to make changes to loan requests at all times during the course of an academic year, and it would be impossible to anticipate what they might be and to list suggestions for all of them. However, some of the most common types of changes that need to be made are described in this section. If you have a specific change that is not listed here, Jenzabar recommends that you contact our support team for assistance.

Making Changes Prior to Releasing Disbursements

If you find it necessary to make changes to student loan information prior to the disbursement of loan funds, you may do so once you have received a response from COD for your last request. The status of your loan should be “A” for Approved and the status of the disbursements should be “A” for Accepted.

If any loans or disbursements are Rejected, you can review the loanEdits for loan records and ‘edit’ codes for the disbursement records. These response codes will give you an idea as to why the loan or disbursement request was rejected. You can make any changes that you need to make and reset the loan record and disbursements (if one or both were rejected) back to a “F – Ready to Transmit” status. The updated data will be exported with the next “Export COD Batch” run.

If a student or the Financial Aid Office decides to change a student’s loan award, this can be done by making the changes to the loan record and then the disbursement record(s). On the loan record, change any data that affects the amount the student may receive for a loan and then change the Approved Amount to the new amount.

Note Changes can also be made to the Requested Amount, but this is not required to make a loan change with COD.

When you save the changes to the Approved Amount in the loan record, the program will prompt you to make changes in the disbursement amounts.



You can either choose “Auto-adjust” to adjust the disbursement amounts for you automatically, or “Disbursements” to make the changes manually. You will then be directed to the disbursement screen to review the changes the program is making to the disbursements. You can make any changes that you need to make and reset the loan record and disbursements (if one or both were rejected) back to an “F – Ready to Transmit” status. The updated data will be exported with the next “Export COD Batch” run.

Note It is important that you allow enough time prior to a disbursement date for the changes to take place. If you try to make a change the day before a disbursement, there could be communication issues between the changes and the actual disbursement because there isn’t enough time for COD to process the change. If changes are necessary, wait until after the disbursement to make them to prevent these issues.

Making Post Disbursement Changes

There are many situations where you may need to decrease or increase a loan for a student. If you need to increase a loan for any reason, you have the option of using an additional aid code (defined as a loan aid code) to originate another loan for the student for an additional amount. This is acceptable to COD.

Whenever you are making changes and exporting, you may want to consider running the FinAid audit frequently to keep your Financial Aid amount statuses updated.

Note Once a disbursement has been made, many changes to the disbursement record require that you set the Sequence Number to “2” or increment to the next number if multiple changes have already been made.

Decreasing a Loan

There are several reasons why a student’s loan may be decreased. For example, the student may no longer be eligible for the full amount, does not need or want the full amount, does not want the loan, does not attend the second term of the loan, etc.

If a student’s loan needs to be reduced for a term where a disbursement has been completed, you will need to do the following:

1. Change the Approved STAF/UNSB/PLUS amount on the loan screen. This will prompt you to change the disbursement records. Choose the “Disbursements” option.
2. Update the “Expected” and Guaranteed amounts to the new term amount (reduced amount or zero amount) and dates (date of change) on the disbursement record for the term.
3. Remove dollar amount and date for the Disbursed and Released columns for the disbursed term.
4. Set Sequence Number to “2” (or the next one in the sequence if more than one change has occurred post-disbursement).
5. Change any future Expected/Guaranteed disbursement amounts/dates if decrease applies to future disbursement records.
6. Set the status of the disbursements changed to “F” (Ready to Transmit).
7. Set the status of the loan record to “F” (Ready to transmit).
8. Export changes.

The response should be received within a few hours. Updates to the disbursement records will update the amounts on the FAENTRY screen.

Terminating a Loan

A student decides they do not want a loan or they are no longer eligible for the loan.

1. Change the Approved STAF/UNSB/PLUS amount on the loan screen and set to zero. You could be prompted for changes to the disbursement records. Choose the “Disbursements” option.
2. Modify the disbursed term entry and change the Expected and Guaranteed amounts to zero. Change dates to current date.
3. Remove the dollar amount and date for both the Disbursed and Released columns for the disbursement record for the disbursed term.

4. Change the “Sequence Number” to 2.
5. Set the Disbursement Status to “F” (Ready to Transmit).
6. Modify any future disbursements and set the Expected and Guarantee amounts to zero.
7. Set the Disbursement Status to “F” for future terms that you just modified.
8. Set the loan record status to “F” (Ready to Transmit).
9. Export changes.

The response should be received within a few hours.

Increasing a Loan

There are several possible reasons that you would increase a student’s loan. These include increased eligibility due to a grade advancement, allowance for additional Unsubsidized funds when a PLUS loan is denied, student decides to take the full amount of the loan that they had reduced earlier, etc.

You could choose to create additional aid codes and use those aid codes to create a new loan for the student that includes the additional amount. Examples include SUBA, SUBB, SUBC, USBA, USBB, USBC, PLSA, PLSB, PLSC, etc. If you choose to not do this, you may increase the existing loan amount and modify the disbursements.

Note You may want to create a special aid code to track those who receive the Additional Unsubsidized amounts and have the Decision Processor set the flag on the loan record for you when you add the new aid code/loan for the student.

Increasing a Loan Due to a Grade Advancement Mid-Year

In the following example, the student is a sophomore and received a \$4500 Stafford loan for the award year or \$2250 per term. She received the FALL disbursement for her loan.

Jenzabar CX College - Database: trng3

Financial Aid Entry - Loan Tracking

ID: 139651 Perez, Millicent T. SSN: 200-10-4308 Award Year: 9910 Cur: 1

Progr: UNDG Major: MUS ACST: ACPT Start: FA 2008 Grad: SP 2011 Num: 1

Originator... COD Direct Lending COD UniqID... 200104308S10G9999001

Aid Year... 9910 Period... FS FALL - SPRING

Loan Type... S COD STAF Loan BegEnd... 08/20/2009 - 05/15/2010

Grade Level... 2 2nd year/sophomore Requested Service... GP

STUDENT

Guarantor... COD

Antic Grad... 05/14/2011

Enroll Stat... F

Attend Cost... 21000

Family Contr... 0

Estimate Aid... 0

Serial Code... S

Delivery Meth... P

Defer Pmt... 0

From Note... 0

STUDENT CONT'D

Pay Interest

Dependent... ProfCavk

Citizenship... 1

Alien Reg No...

Driver Lic St...

Licf...

Date of Birth... 05/15/1988

Signed...

References...

Disclosure... Y N Att Schl... 99999999

LOAN

Lender ID/EFT... COD Y

Request Amt... 4500.00 Fees: 1.50

Approved STAF... 4500.00

Stat/Date... 11/17/2009

Released to Student

Certified... 11/17/2009

Exported... 11/17/2009

Trans... 01

MPN/STAF LOANS

User: rlnichol 9:54 AM EST

In the following example, the student has completed the FALL term and, due to hard work and summer school, she is a Junior going into the SPRING term. She is now eligible for an additional \$1000.

Jenzabar CX College - Database: trng3

Financial Aid Entry - Loan Tracking

ID: 139651 Perez, Millicent T. SSN: 200-10-4308

Prog: UNDC Major: MUS Acct: ACPT Start: FA 2008 Grad: SP 2011 Cur: 1 Num: 1

Award Year: 0910

# Aid	Sess Year	Expected	Guaranteed	Disbursed	Released	DisbStatus
1	SUBA FA 2009	11/17/2009	2,228.00	2,228.00	2,228.00	Released to
2	SUBA SP 2010	01/08/2010	0.00	0.00	0.00	Accepted

Sequence Number: 1 Release: Y Disb Edits: 0

Fees: Guar: 0.00 Paid Guar: 0.00 Orig: 0 Int Rebate: 34

Hold/Release: 0 Return Amount: 0.00 Disb Meth: 8

DISBURSEMENT ENTRY Enter the expected date of the disbursement.

User: rlnichol 10:03 AM EST

To make the increase for the SPRING term, do the following:

1. On the loan record screen, change the student's Grade Level to 3 (Junior).
2. Modify the Approved Amount to \$5500. The program will prompt you to update the disbursement records, so choose "Disbursements" – you do not want to use the Auto-Adjust for this change.

Financial Aid Entry

Loan disbursements must match Approved amount to get/remain certified.
Gross disbursements (\$4500.00) do not equal Approved amount (\$5500.00).

Disbursements Auto-adjust Abort

3. Modify the SPRING disbursement by changing the Expected amount to the new amount (\$3250), set the Disbursement Status to "F", and change the Sequence Number to "2".

Jenzabar CX College - Database: trng3

Financial Aid Entry - Loan Tracking

ID: 139651 Perez, Millicent T. SSN: 200-10-4308

Prog: UNDC Major: MUS Acct: ACPT Start: FA 2008 Grad: SP 2011 Cur: 1 Num: 1

Award Year: 0910

# Aid	Sess Year	Expected	Guaranteed	Disbursed	Released	DisbStatus
1	SUBA FA 2009	11/17/2009	2,228.00	2,228.00	2,228.00	Released to
2	SUBA SP 2010	01/08/2010	0.00	0.00	0.00	DL Ready to

Sequence Number: 2 Release: Y Disb Edits: 0

Fees: Guar: 0.00 Paid Guar: 0.00 Orig: 0 Int Rebate: 49

Hold/Release: 0 Return Amount: 0.00 Disb Meth: 8

DISBURSEMENT ENTRY Enter the order in which this disbursement should be processed

User: rlnichol 10:06 AM EST

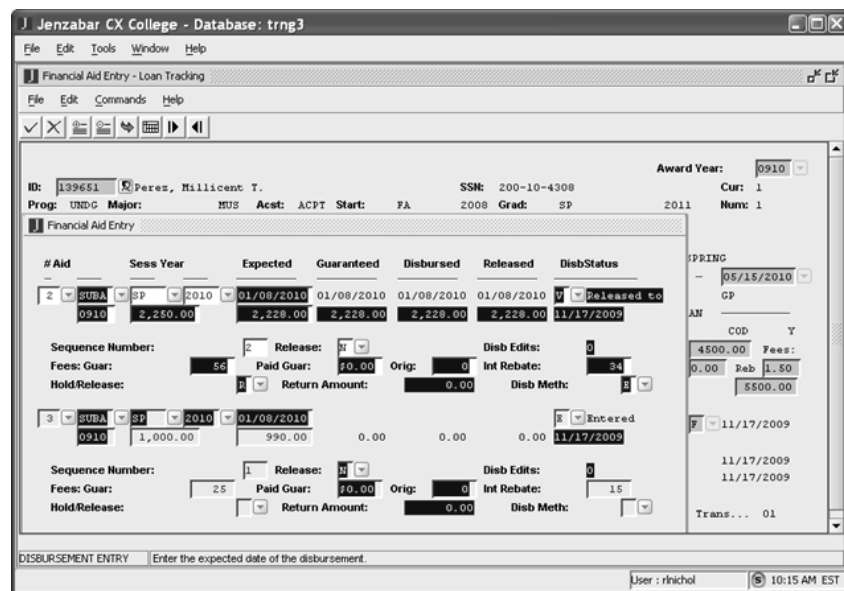
4. Save the changes.
5. Set the loan record status to “F” for Ready to Transmit.
6. Export the loan changes and a response should come back within a few hours.

If the second disbursement in SPRING had already been made (sometimes a Grade Level change may not have been noticed before the SPRING disbursement occurs), you can do the following steps.

1. On the loan record screen, change the student’s Grade Level to 3 (Junior).
2. Modify the Approved Amount to \$5500. The program will prompt you to update the disbursement records, so choose “Disbursements” since you do not want to use the Auto-Adjust for this change.



3. Add a third disbursement for the extra \$1000.
4. Set the loan status to “F” for Ready to Transmit.
5. Export any changed loan records.
6. A response should be received within a few hours.



Retro-active increase in unsubsidized eligibility or student requests increase of loan to full amount

If you choose to include the increased amount within the current loan, follow the steps below. It is presumed that the first disbursement has already been released and posted to the student’s account and that you are increasing the loan amount to evenly apply to each term in the year.

1. Update the Approved Amount to the new increased amount. This will prompt you to update the disbursements. Choose “Disbursements” to make a manual adjustment to the disbursements.
2. On the disbursement screen, insert a new disbursement to be a second disbursement for the FALL term, setting the disbursement date to the near future (allow for turnaround time) and entering the additional amount for the FALL term. The program should calculate the Fee and Rebate amounts on the new entries. Make sure the Disbursement number is “2”.
3. Change the disbursement number from “2” to “3” for SPRING and enter in the full second term amount. Use the standard disbursement date for SPRING. Fee and rebate amounts should be calculated for you.
4. Verify that you have the disbursements numbered correctly—this is important!
5. New disbursement entries should have a status of “E”.
6. The loan record should have a status of “F” for Ready to Transmit.
7. Export loan changes and wait for response.

The student originally received a \$1000 Unsubsidized loan. His parent’s request for a PLUS loan was denied so he was eligible for \$2000 in additional Unsub funds. You can create a separate loan for the \$2000 or you can update the existing Unsub loan to include the extra \$2000 for the entire academic year.

Note If the student is receiving Additional Unsub money, this flag should be set to “Y” on the loan record screen. If you are using a separate aid code for the Additional Unsub situations, you can have the Decision Processor set the flag for you when you add the aid code for the student.

The screenshot shows the 'Financial Aid Entry - Loan Tracking' window in the Jenzabar CX College database. The form is for a student named Black, Bob (ID: 139637). Key fields include:

- Originator:** COD
- Direct Lending COD:** [blank]
- UniqID:** 200104316U10G99999001
- Aid Year:** 0910
- Period:** FS - FALL - SPRING
- Loan Type:** COD UNSB Loan
- BegEnd:** 08/20/2009 - 05/15/2010
- Grade Level:** 1st year-attended college b
- Requested Service:** GP
- Request Amt:** 1000.00
- Fees:** 1.50
- Approved UNSB:** 3000.00
- Status:** F (Ready to Transmit)

8. Update the Approved UNSB to the new amount of \$3000. The original amount was \$1000.

9. Insert a new disbursement record for FALL and call it disbursement number “2”. Enter the additional amount the student receives for FALL.

10. Update the SPRING 2010 disbursement by setting the disbursement number to “3” and then enter the remaining amount for the loan.

Making Changes to Loan Records

There are many reasons to make changes to loan requests at all times during the course of an academic year, and it would be impossible to anticipate what they might be and to list suggestions for all of them. However, some of the most common types of changes that need to be made are described in the “Troubleshooting Direct Lending” section in the Financial Aid Loan User Guide.

Adding Additional Aid Codes

With COD, you can easily add additional aid (SUBA, SUBB, SUBC, USBA, USBB, USBC, PLSA, PLSB, PLSC, etc.) at any point. Add aid codes as you typically would.



Document Tracking

This section provides reference information about the Contact Entry program of the Document Tracking area of the Financial Aid product. Contact Entry allows you to view student's financial aid records and maintain associated Contact records. Document Tracking also has these features:

- Document Review: A Csh script that runs Document Tracking SQL scripts
- Contact Batch Entry: A common program used to enter a list of IDs in which to process contacts
- Reports that allow you to track what documents have been submitted, what documents need to be submitted, and how many times reminder letters have been sent to a student.

Note See *Menus, Screens, Scripts and Reports* in this document for more information about the Document Tracking scripts.

See Contact Batch Entry in the *CX System Technical Reference* for more information about the Contact Batch entry program.

CX uses Contact records to record the types of communication (e.g., letters or documents) sent by an institution to a student, and/or from a student to an institution. Institutions can have Contact records added for every student that begins financial aid processing. These are called *default contacts*.

Default Contact Records

The following are the standard Financial Aid product Contact records that the system adds each time a Student Financial Aid record (stufa_rec) is added. The default contact codes/resources records are defined in the \$CARSPATH/include/custom/finaid file.

- AIDAPPIN
- FEDIN
- SAPACTN
- FFSIN
- NAFIN
- PACKAGE
- STGVERIN
- PARTAXIN
- STUTAXIN

The default Contact records must be present in the Contact table.

Note Default Contact records can be added or deleted from the \$CARSPATH/include/custom/finaid file. All added contacts must be placed

before the {"LAST", " "} line in the file. The LAST line must remain in the file even if you delete all Contact records.

Creating Contact Records

You can enter contacts for a student in a number of ways:

- Using the automatic creation of Student Financial Aid records feature: you can enter a series or large set of contacts for all students who have applied.
- Using Financial Aid Entry: when you award an aid to a student manually or using Packaging. Contacts of this type pertain to the specific requirements of the aid you are awarding.
- Using an SQL script: when you need a special contact for a particular set of students based upon selection criteria.
- Using Contact Entry: when you need to enter occasionally used contacts or contacts needed only after reviewing documentation for information that cannot be stored in the system.

Contents of Contact Records

Contact records contain several important pieces of information, as follows:

- ID – Specifies the student ID number for the contact
- Tickler – Specifies in the Contact table where the contact is defined, but it is not displayed on any of the screens in Document Tracking
- Correspondent ID – Specifies the ID number of the college that has requested financial aid transcripts if the contact denotes that one is expected
- Add date – Specifies the date the contact was added to the computer for a student
- Contact date – Specifies the date the contact was completed or executed
- Contact code – Specifies the name of the contact or Contact Resource
- Status – Specifies the current status of the contact: E for expected, C for completed, or V for voided

Predefining Contact Statuses

You can predefine those contact statuses that are added by Financial Aid Entry when awarding an aid, or those added or modified by an SQL script. The statuses are as follows:

- E – Indicating actions expected to occur in the future
- C – Indicating correspondence to actions already completed

The system initially creates most contacts with a status of E to indicate the corresponding action is *outstanding*. When the contact action does occur, such as when a particular document is received or a letter is sent to a student, the

system updates the contact to a C status and updates the contact date to indicate when that step was achieved.

Program Features Detailed

This section contains details about the following features of the Contact Entry program:

- Process flow
- Parameters
- Program screens

Special Function Flags

The following records used by Contact Entry have special function flags.

ID record (id_rec)

- ENT_LOCK – Locks the ID record so that other users cannot select or update at the same time.

Profile record (profile_rec)

- ENT_LOCK – Locks the Profile record so that other users cannot select or update at the same time.
- ENT_AUTOINS – Allows the user to add new Profile records without modifying the default values. If this flag is not used, the system only adds a Profile record when an user changes a column value within the record.

Contact record (ctc_rec)

- ENT_SCSTART – Provides an alternate sorting of the Contact records. Checked at the entry of a scrolling region.
- ENT_SGGET – Filters out Contact records that are not of interest or should not be seen. Checked during the retrieval of each row within a scrolling region.
- ent_spec_func – Enables the sorting and filtering logic available on detail windows.

Note The ent_spec_func function uses the setup information from the entsel_table and entselcrit_table.

The ent_spec_func function requires the setting of special function flags ENT_SCSTART and ENT_SCGET for the table in the filename array. At entry of the scroll region, ENT_SCSTART sorts the Contact records based upon the current sort criteria. When retrieving rows for display, ENT_SCGET checks the rows and displays or skips them.

Tickler record (tick_rec)

- ENT_LOCK – Locks the Tickler record so that other users cannot select or update at the same time.
- ENT_FORCELOAD – Loads the Tickler record even when none of the fields from the table are bound on the screen currently in use.

Relationship record (relation_rec)

- ENT_ADDID – Provides the ability to add or update an ID from within the related scroll region via a PTP (process-to-process) connection to ID Entry (identry).

Secondary Relationship record (relsec_rec)

- ENT_ADDID – Provides the ability to add or update an ID from within the related scroll region via a PTP (process-to-process) connection to ID Entry (identry).

Process Flow

Because you can use Contact Entry in a variety of ways, the program does not have a standard process flow.

Contact Entry Parameters

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

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

Parameter Syntax

You can display Contact Entry parameters by entering the program's name and an invalid parameter, such as the following: **ctcentry -**,

The following is the correct usage for running the Contact Entry program from the UNIX shell:

```
ctcentry [-d] [-T tick] [-y fa_yr] [-o ofc_added_by] [-m menuname]
[-f form_selected] [-t today] [-P scr_path] [-a] [-F]
[-M menu_title] [-A] [-D debug_level] [-S pause_level]
```

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

Parameters

The following lists the parameters for running Contact Entry.

-a

Optional – Specifies that Contact Entry will automatically enter query mode.

Example: ctcentry -y 1213 -a

-A

Optional – Specifies a second file filter for sorting purposes.

Example: ctcentry -y 1213 -A

-d

Optional – Specifies access to Contact Entry in display-only mode.

Example: ctcentry -y 1213 -d

-D debug_level

Optional – Specifies the level of debug messages to be displayed, where *debug_level* represents the message level (1,3,5,7,9). To receive more messages, you must specify a high level.

Example: ctcentry -y 1213 -D 9

-f form_selected

Optional – Specifies the name of the form you want to access directly, where *form_selected* represents the form name.

Example: ctcentry -y 1213 -f stufa_1

-F

Optional – Specifies that Contact Entry will force you to query the database for a record before you can enter insert mode.

Example: ctcentry -y 1213 -F

-m menuname

Optional – Specifies a menu that you want to access, where *menuname* represents the menu name. The default menu for Contact Entry is ctcmenu.

Example: ctcentry -y 1213 -m ctcmenu

-M menu_title

Optional – Specifies a different name to be displayed to the right of the screen's tool bar. If you specify more than one word, you must surround the words with quote marks.

Example: ctcentry -y 1213 -M "Financial Aid"

-o ofc_added_by

Optional – Specifies your office code, where *ofc_added_by* represents the office code you specify. The default office code for Contact Entry is DEVL.

Example: ctcentry -y 1213 -o DEVL

-P scr_path

Optional – Specifies the path for screens where *scr_path* represents the path of the screens to use for Contact Entry. The default for Contact Entry is finaid/ctcentry/.

Example: ctcentry -y 1213 -P finaid/ctcentry

-S pause_level

Optional – Specifies the level of pauses for Contact Entry where *pause_level* represents the message level (1-9). To receive more messages, you must specify a higher level.

Example: ctcentry -y 1213 -S 9

-t today

Optional – Specifies the effective date for changes, where *today* represents the date you specify.

Example: ctcentry -y 1213 -t 05/01/12

-T tick

Optional – Specifies the tickler code, where *tick* represents the contact tickler code. To run ctcentry, you must enter either this parameter or the -y parameter.

Example: ctcentry -T FY12

-y fa_yr

Optional – Specifies the financial aid award year, where *fa_yr* represents the financial aid award year. To run *ctcentry*, you must enter either this parameter or the -T parameter.

Example: *ctcentry -y 1213*

Program Screens

Contact Entry has four screens for viewing students' financial aid records and entering Contact records.

Access

The screen files for Contact Entry are located in the following directory path:
\$CARSPATH/modules/finaid/progscr/ctcentry

Screen Files and Table/Record Usage

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

ctcmenu

Contains the Student Forms menu screen.

Menu Access: \$CARSPATH/modules/finaid/progscr/ctcentry

factc

Contains the Contact Entry detail window.

Menu Access: \$CARSPATH/modules/finaid/progscr/ctcentry

Tables/Records Used: *id_rec*, *ctc_table*, *ctc_rec*, *ctc_blob*

namectc

Contains the Contact Entry detail window, which displays Contacts with names.

Menu Access: \$CARSPATH/modules/finaid/progscr/ctcentry

Tables/Records Used: *id_rec*, *ctc_table*, *ctc_rec*, *ctc_blob*

stufa_1

Contains the Contact Entry main screen.

Menu Access: \$CARSPATH/modules/finaid/progscr/ctcentry

Tables/Records Used: *stufa_rec*, *id_rec*, *aa_rec*, *st_table*



Financial Aid Auditing

This section provides reference information about the Financial Aid Audit program. The Financial Aid office can perform the following functions with Financial Aid Audit:

- Review discrepancies between its records and the Business office's records. When the audits are processed in update mode, the system corrects the discrepancies that can be corrected automatically.
- Verify the setup of aid codes that have been designated in the Aid Table (aid_table) to be utilized with the Financial Aid Transcript output/production.
- Obtain a report listing students' records that have been changed within a specified date range.

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

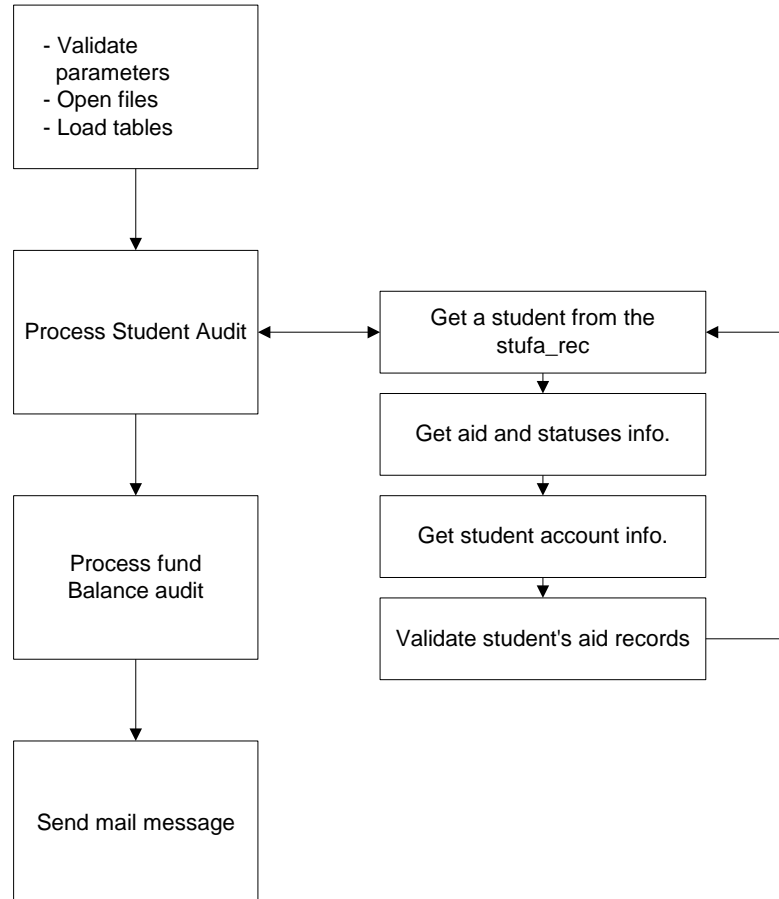
- Process flow
- Parameters

Times for Running Financial Aid Audit

Financial Aid Audit should not be run when another financial aid process is running (e.g., financial aid ACE reports, Financial Aid Entry, Financial Aid Need Analysis) since data being reported or displayed may be incorrect. Financial Aid Audit should be run overnight or at a time when financial aid processes are not running.

Process Flow

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



Data Flow Description

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

1. Financial Aid Audit validates the user's entered parameters, opens input files, and loads tables. Financial Aid Audit uses the following tables as input:
 - aidpkg_table
 - aid_table
 - subs_table
 - aid_form_table
 - prog_table
 - stufa_rec
 - aid_rec
 - subt_rec

- loandisb_rec

2. Financial Aid Audit begins the student audit by reviewing the stufa_rec and aid_rec. The program processes each student in the stufa_rec for the financial aid award year value (stufa_fayr) specified by the user (using the -y parameter).

Note To be audited by the program, a student must have an entry in the stufa_rec. If the student has entries in the aid_rec without a corresponding stufa_rec entry, the program's results for the fund balance audit could be incorrect.

While processing entries in the aid_rec, Financial Aid Audit accumulates aid totals based on disbursed amounts and aid status values. The program uses these totals in the fund balance audit for validating the amounts in the aidpkg_table.

3. Financial Aid Audit selects a student entry in the stufa_rec, then the program searches the aid_rec for the following:
 - The award year value (aid_fayr) equal to that specified by the user (-y parameter).
 - The ID value (aid_id) equal to the ID value in the stufa_rec (stufa_id).
4. Financial Aid Audit selects aid and statuses and student account information. As Financial Aid finds aid_recs, the program validates the following entries:
 - The aid_stat, aid_amt_stat, and aid_pkg_stat values.
 - The aid_pkg_meth to determine if it is valid according to the pkg_table (unless the -m parameter equals ALL or is not specified).
 - If the award is a loan (taid_loan_track = Y), aid_aid_no must match one or more loandisb_aid_no's.

Note If you run Financial Aid Audit using the -m parameter, the aid_pkg_meth also must equal the -m value (unless the -m value is ALL).

- The aid_code value to determine if it is valid according to the aid_table.
- The stufa_pkg_stat to ensure that it contains a valid packaging status.
- The stufa_tot_offer against the total of the aid_amt for the aid records found.
- The aid_amt_stat to ensure that the correct amount status value is in use.

Note If you run the program to update errors, the program updates incorrect aid_amt_stat values and the stufa_tot_offer value.

5. Financial Aid Audit locates the subt_rec corresponding to the aid_rec (if it exists) and compares the aid_amt to the subt_amt_pay_act, or if the award is a loan (taid_loan_track = Y), compares the loandisb_disb_amt to the subt_amt_pay_amt.

Note When the program processes all of the aid records for the current stufa_id, the program finds the next stufa_rec and processes the next student.

6. Financial Aid Audit processes the Fund Balance Audit. The program reviews the aidpkg_table to validate the aid amount totals against the accumulated amounts from the aid_rec. The program validates the aidpkg_table starting with the first entry containing the award year specified by the user. The program checks each entry found containing the following values against the aid totals obtained from the student audit pass:

- `taidpkg_awd_amt`
 - `taidpkg_disb_amt`
 - `taidpkg_cancel_amt`
7. Financial Aid Audit sends error messages if the program locates any amount field that:
 - Is non-zero and has no `aid_rec` entries that support the amount
 - Does not equal the accumulated amount from the `aid_rec`
 8. After processing the `aidpkg_table`, Financial Aid Audit checks to see if any additional records need to be added to the `aidpkg_table` based on records in the `aid_rec`.

Note If the user runs the program to update errors, Financial Aid Audit automatically adds entries to the `aidpkg_table` and updates the amounts where necessary.

Records Updated

The following records are added to or updated by Financial Aid Audit:

- `aidpkg_table`
- `aid_rec`
- `stufa_rec`

Financial Aid Audit Parameters

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

Financial Aid Audit can be run either for all students in a financial award year, or for individual students. A specific packaging method can be audited with the method parameter.

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

Parameter Syntax

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

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

```
faaudit -y year -l subs [-u -m method -o override -M mail option -U user list -i id numbers]
```

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

Parameters

The following lists the parameters for running Financial Aid Audit.

-d loandisb option

Optional – Show loan awards which are missing disbursement records (Y/N)? (Default = N).

Example: faaudit -y 1213 -l S/A -d Y

-i ID numbers

Optional – Specifies ID number(s) to be audited where *ID number(s)* represents one or multiple ID numbers that you specify.

Example: faaudit -y 1213 -l S/A -i 12666 65441

Note This causes Financial Aid Audit to only perform the student audit in the aid_rec and stufa_rec for the ID numbers listed; Financial Aid Audit does not perform the fund balance audit of the aidpkg_table.

-k enable lock files

Optional – When Y (the default), locker files are created to track the userid that has locked a Student Financial Aid record (stufa_rec). When N, the locker files are not created, but database locks are still held

Example: faaudit -y 1213 -l S/A -k N

-l subs

Optional – Specifies a subsidiary account ledger where *subs* refers to the subsidiary account ledger that you specify. A subsidiary parameter identifies the subsidiary that financial aid is disbursed to for validation of disbursed awards.

Example: faaudit -y 1213 -l S/A

Note Beginning with SMO release 12796, this parameter is no longer used by the program. If present, it will not be treated as an invalid parameter, but will be ignored.

-m method

Optional – Specifies a packaging method to be audited where *method* represents the packaging method you specify.

Example: faaudit -y 1213 -l S/A -m ACT

Note Financial Aid Audit defaults to auditing both actual and also simulation packaging methods. To run Financial Aid Audit for a specific packaging method, use the -m method option.

-M

Optional – Specifies to mail output to the user.

Example: faaudit -y 1213 -l S/A -i 12666 65441 -M

-o

Optional – Specifies the override option.

Example: faaudit -y 1213 -l S/A -i 12666 65441 -o

Note Financial Aid Audit will not update errors if there are any unposted financial aid vouchers unless the -o override parameter is used along with the -u parameter.

-u

Optional – Specifies the update option.

Example: faaudit -y 1213 -l S/A -u

Note The -u parameter allows *faaudit* to update the errors found for the two students in the -I parameter. However, if the -u option is specified, *Financial Aid Audit* checks for any unposted financial aid voucher transaction files before starting the audit.

-y year

Required – Specifies the award year where *year* represents the year you specify.

Example: faaudit -y 1213-I S/A

Output Example

The following is an example of the audit output file produced by Financial Aid Audit:

Student Financial Aid Audit								
Year: 1213 Subs: S/A								
ID	Code	Sess	Ad	Am	Pk	Aid Amt	Tot Amt	Error Message

14326	Koehler, Lee Anna							
*	NDSL	FA12	N			0.00	0.00	Invalid amount status
*	PELE	FA12	N			0.00	0.00	Invalid packaging status
*	PELE	FA12	N			0.00	0.00	Invalid amount status
*	STF1	FA12		AA	A	1250.00	390.00	Loan/disbs not found for award
*	STF1	SP13		AA	A	1250.00	100.00	Loan/disbs not found for award
	DES1	SP13	C	AP	M	810.00	1080.00	#Aid amt updated but not posted
	ATHC	SP13	N	AA	M	100.00	100.00	Amt stat should be AD *

Fund Balance Audit								
Year: 1213 Subs: S/A								
Code	Type	Prog	Fund Balance		Aid Total		Error Message	

PELL	GRNT		1219.00		0.00		No aid recs: disb amt != 0 *	
CWSP	JOB		1500.00		0.00		No aid recs: awd amt != 0 *	
DES	GRNT	UNDG	-4250.00		500.00		Award amount != aid total *	
DES	GRNT	UNDG	63549.33		58799.33		Disb amount != aid total *	
PELL	GRNT	UNDG	2505.00		0.00		Award amount != aid total *	
PELL	GRNT	UNDG	351840.00		355564.00		Disb amount != aid total *	
# Run the Financial Aid Entry posting option to correct error								
Student audit error total: 15								
Fund balance audit error total: 6								



Other Financial Aid Programs

This section provides reference information about the other Financial Aid programs. The following programs and processes are discussed:

- Print Text Comments
- Need Analysis Tape Processing
- Financial Aid Check Refunding
- FISAP Reporting

Print Text Comments

CX contains parameters and compilation values for executing the Print Text Comments program. You can specify parameters to compile Print Text Comments in a specified manner at the time of execution.

Note You can also specify compilation values with the includes for the Financial Aid product that affect the Print Text Comments program.

Parameter Syntax

You can display Print Text Comments parameters by entering the program's name and an invalid parameter, such as the following: **prtext -**,

The following is the correct usage for running the Print Text Comments program from the UNIX shell:

```
prtext [-f fatext] -y pp_year -b pp_id_beg [-e pp_id_end]
```

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

Parameters

The following lists the parameters for running Print Text Comments.

-b pp_id_beg

Required – Specifies the beginning student ID number where *pp_id_beg* represents the ID number you specify.

Example: fatext -f ~<user account> -b 12345 -e 54321

-e pp_id_end

Optional – Specifies the ending student ID number where *pp_id_end* represents the ID number you specify.

Example: fatext -f ~<user account> -b 12345 -e 54321

-f fatext

Optional – Specifies the name and location of the output file where *fatext* represents the path and file name you specify.

Example: fatext -f ~<user account>

-y pp_year

Required – Specifies the financial aid year in which to print text comments.

Example: fatext -f ~<user account> -y 0405

Financial Aid Check Refunding

The CX Financial Aid product contains the Check Refunding process for providing selective refunding of financial aid to students. The process can produce refund checks for groups of students or individually by student ID. For the CX Financial Aid Check Refunding process to function correctly, you must ensure that *all* of the following processes are set up on CX:

- Financial Aid Posting
- Fee Collection
- Third-Party Billing

Parameter Syntax

You can display Financial Aid Check Refunding (sa2sr) parameters by entering the program's name and an invalid parameter, such as the following: **sa2sr -**,

Following is the correct usage for running the Financial Aid Check Refunding program from the UNIX shell.

```
sa2sr -a aid_dmm -d aid_date [-i id_dmm] -p aid_pct [-r resrc_code] -s  
aid_sess [-t tick_code]
```

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

Parameters

The following lists the parameters for running the Financial Aid Check Refunding program.

-a aid_dmm

Required – Specifies a list of refundable aid codes where *aid_dmm* represents one or multiple aid codes you specify.

Example: sa2sr -a PELL -d 050209 -p 100% -s FA09

-d aid_date

Required – Specifies the date that refund payment will occur where *aid_date* represents the date you specify.

Example: sa2sr -a PELL -d 050204 -p 100% -s FA09

-i id_dmm

Optional – Specifies a list of ID numbers of students to refund where *id_dmm* represents one or multiple ID numbers.

Note Enter 0 to list all IDs.

Example: sa2sr -a PELL -d 050209 -i 12345 54321 -p 100% -s FA09

-p aid_pct

Required – Specifies the percentage of refundable aid to move to refundable accounts where *aid_pct* represents the percentage you specify.

Example: sa2sr -a PELL -d 050209 -p 100% -s FA09

-r resrc_code

Optional – Specifies the Contact record resource code where *resrc_code* represents the code you specify.

Example: sa2sr -a PELL -d 050209 -p 100% -r FACK001 -s FA09

-s aid_sess

Required – Specifies the session for this refunding where *aid_sess* represents the session you specify.

Example: sa2sr -a PELL -d 050209 -p 100% -r FACK001 -s FA09

-t tick_code

Optional – Specifies the Contact record tickler code where *tick_code* represents the code you specify.

Example: sa2sr -a PELL -d 050209 -p 100% -r FACK001 -s FA09 -t RFND

Tables Updated by Financial Aid Check Refunding Process

The *After Adding Aid Codes* process uses the codes in the Aid table (*aid_table*) to automatically update the Total Association table, the Subsidiary Association table, and the Subsidiary Total table.

- If the Deferment table *Refund Excess to Student* field is set to Y, and monies remain after all fees have been paid, the process places the refundable amount in the Subsidiary Total code on the student account.
- The process locates the Subsidiary Total code in the Deferment table *Refund Code* field value, associated by the Defer Application table.

Associated Tables

The Financial Aid Check Refunding process uses several tables to calculate refund amounts. The following lists the tables used in the process and each table's relationship with the other tables in the process.

Billing Fiscal Year table (fsbill_table)

Contains the fiscal year (e.g., 0X0Y), and the session/year (e.g., FA0X) codes that the Total Association table uses to apply the yearly cap amount.

Deferment table (defer_table)

- Contains the deferment application code that associates the Deferment table with the Deferment Application table.
- Also contains two important fields used by the check refunding process, which are:
 - Refund code

- Refund excess to student

Deferment Application table (defapp_table)

- Contains the deferment application code that associates the Deferment Application table with the Deferment table.
- Contains the total association code (e.g., ENRL Enrollment Fees) that associates the Deferment Application table with the Total Association table.

Total Association table (totas_table)

Contains the total association code (e.g., ENRL Enrollment Fees) that associates the Total Association table with the Deferment Application and the Subsidiary Total tables.

Subsidiary Total table (subt_table)

Contains the association code that associates the Subsidiary Total table with the Total Association table.

Need Analysis Tape Conversion

An institution can use the Need Analysis Tape Conversion processes to enter need analysis information from tapes to CX. The options on the Financial Aid: Need Analysis Tape Conversion menu allow the institution to enter information from the following tape sources to CX:

- Federal government
- ACT (American College Testing)
- CSS (College Scholastic Service)
- PHEAA (Pennsylvania Higher Education Assistance Agency)

Note ACT has stopped supporting tapes for need analysis information; however, processing is available through the 93/94 session.

The need analysis tape conversion process loads financial aid need analysis information provided by tape from one of the Multiple Data Entry (MDE) processors into the CX Financial Aid Database. Once in the database, the need analysis information can be accessed for update or review by standard CX financial aid processes.

Parameter Syntax

The following is the correct usage for running Need Analysis Tape Conversion from the UNIX shell:

```
natp -l subs -y year -t tape_code -a agency [-r][-o][-v]
```

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

Parameters

The following lists the parameters for running the Need Analysis Tape Conversion program.

-a agency

Required – Specifies the agency that produced the tape, where *agency* represents the tape agency you specify.

Example: natp -l S/A -y 1213 -t TAPE -a ACT

-l subs

Required – Specifies a Subsidiary Ledger, where *subs* represents the subsidiary code you specify.

Example: natp -l S/A -y 1213 -t TAPE -a ACT

-o

Optional – Specifies to override student information. This option allows the *natp* program to ignore special decision logic used to make sure that data in the Financial Aid Database is not overwritten.

Example: natp -l S/A -y 1213 -t TAPE -a ACT -o

-r

Optional – Specifies to report updates only. The NATP program does not copy or update student information. Use this option to identify students in the Need Analysis Tape Record with blank social security numbers.

Example: natp -l S/A -y 1213 -t TAPE -a ACT -r

-t tape_code

Required – Specifies a tape code, where *tape_code* represents the code you specify.

Example: natp -l S/A -y 1213 -t TAPE -a ACT

-v

Optional – Specifies verbose mode. This option turns on the printing of extensive messages listing each student processed and every add, update, or deletion by the program.

Example: natp -l S/A -y 1213 -t TAPE -a ACT -v

-y year

Required – Specifies the financial aid award year, where *year* represents the financial aid award year you specify.

Example: natp -l S/A -y 1213 -t TAPE -a ACT -r

Building Budget Tables

You can load the financial aid expense budget information on a tape into the student budget records. If you wish to load student expense budgets from tape, the Budget Table (*fabgt_table*) and Budget Association table (*fabgtas_table*) must contain entries matching the budget codes used on the tape. The tape conversion program will not load budgets when it cannot find an exact match of the tape budget code in the Budget Table or Budget Association Table. If a student already has Budget Records, they will not be updated through loading need analysis tape information.

The tape conversion program takes the first budget identified on the tape and adds the totals into the Fall session; it will not automatically split the budget into multiple sessions. At minimum, Budget Associations must exist for the Fall session. Also, the order of the Budget Association items must match the order of the items (i.e., tuition) found on the tape. The default budget item dollar amount

in the Budget Association Table can be any value you wish to be defaulted. When budget information is loaded from tape, the dollar amounts loaded will be those found on the tape for each student.

Data Overwrite Protection Logic

The NATP program contains special logic verifying that information to be loaded from a tape does not automatically overwrite data already in the system. The following is a summary of this decision logic done for each student:

1. If the Social Security number is blank: no updates are done.
2. If the Social Security number from the tape is not found in the ID Record (id_rec): no updates are done.
3. If the tape information is older than the information in the Need Analysis Form Record (naf_rec, naf0809_rec, ...naf1213_rec): no updates are done.
4. If the Allow Tape Update field (naf_allow_upd) is set to N (No): no updates are done.
5. If the Allow Tape Update field is Y and the tape information is newer than the information in the Need Analysis Form Record, or there is no need analysis information in the system, the need analysis form (naf_rec, naf0809_rec, ...naf1213_rec) and intermediate calculation data (fana_rec) are loaded into the system.
6. If Budget Records (fabgt_rec) have not been added for the student, the first budget type defined on the tape is added for the student. If a budget record already exists, it will not be updated.
7. If the Allow Calc (fan_allow_calc) fields are Y, Need Records will be either added or updated depending on the information on the tape.

Note If you use the -o (overwrite) option, the system ignores steps 3, 4, 5, and 7.

FISAP Reporting

CX's FISAP reporting options can be used to assist in gathering the necessary data for the Department of Education's yearly Fiscal Operations Report and Application to Participate. The report sections produced directly by CX are Part II, Section E of the Applications and Fiscal Operations Report (FISAP) entitled Information on Eligible Aid Applicants for the Award Year FISAP_FAYR_TITLE, and Part VI, Section A Distribution of Program Recipients and Expenditures by Type of Student.

Parameter Syntax

You can display FISAP parameters by entering the following: **fisap -**,

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

```
fisap [-b beg_id] [-i id_list] [-f] [-l sub_code] [-c call] [-v] [-m method] -y year
```

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

Parameters

The following lists the parameters for running the *fisap* program.

-b beg_id

Optional – Specifies the beginning ID number where *beg_id* represents the ID number you specify.

Example: `fisap -y 1213 -b 12345 -l S/A -c 1`

-c call

Required – Specifies to run one or both routines of the *fisap* program where *call* represents the routine you want to call. The routines are as follows:

- Update total income
- Create Fisap record

When you specify **-c 1**, the program performs both routines. When you specify **-c 0**, the program only updates total income for a student.

Example: `fisap -y 1213 -l S/A -c 1`

-f

Optional – Specifies to read ID Numbers from stdin.

Example: `fisap -y 1213 -f -l S/A -c 1`

-i id_list

Optional – Specifies a list of ID numbers where *id_list* represents list of ID numbers.

Example: `fisap -y 1213 -i 12345 12346 12347 -l S/A -c 1`

-l sub_code

Required – Specifies the Subsidiary code where *sub_code* represents the code you specify.

Example: `fisap -y 1213 -l S/A -c 1`

-m method

Optional – Specifies the need analysis methodology where *method* represents the code you specify.

Example: `fisap -y 1213 -l S/A -c 1 -m FM`

-v

Optional – Specifies Verbose output.

Example: `fisap -y 1213 -l S/A -c 1 -v`

-y year

Required – Specifies the Financial Aid award year where *year* represents the code you specify.

Example: `fisap -y 1213 -l S/A -c 1`

Decision Programs

The decision programs enable you to automate the assignment of budgets and packaging groups for your students, based on a set of rules you define in tables. Three programs support this function:

- fabgt
- fadecgrp
- fadec

The *fabgt* Program

The Financial Aid product uses *fabgt* to assign budgets to students who meet specific criteria of your institution. You can create your decision criteria and, in accordance with your requirements, students can be assigned a budget (and/or budget item to go along with the budget). Students can receive a budget item in the process of creating the budget, or later on, their budget items can be modified based on a decision criteria.

fabgt Program Features

This section includes details about the following features within *fabgt*:

- Process flows
- Budget code information
- Parameters
- Mail message format

Access to *fabgt*

The program files for the *fabgt* process are located in \$CARSPATH/src/finaid/fabgt.

Process Flow for *fabgt*

The following describes the data flow in *fabgt*. Note that prior to running *fabgt*, the user creates a decision and its supporting criteria in the decision tables.

The *fabgt* program selects a student, based on satisfying one of these criteria:

- If the Overwrite/Replace flag is set to Y.
- If the Overwrite/Replace flag is set to N, and the expected budget for the student in the faneed_rec is zero or blank.
- If the user wants to have only certain students processed based on contacts, the user specifies which resources to pass to the program. Students who have that resource in their contact list as an Expected contact are processed; otherwise, they are bypassed.
- If the user passes a Y to the Complete argument, *fabgt* will complete the contact. Whether the student did receive a package assignment or not, *fabgt* will update the contact to a Complete status.
- If the user wants to create a new budget for all students regardless of whether they have previous budgets, the user must set the Overwrite/Replace flag to Y(es). If the flag is set to Y, any student who passes the criteria will receive a new budget. However, if the

Overwrite/Replace flag set to N(o) (or left blank), students will be assigned a budget only if they meet the criteria and do not already have a budget.

The user can create FAITEM items to be attached onto a budget, either when *fabgt* creates a financial aid budget or later on as an update or insert.

If a FABGTDUR exists in the decision tables, the student passes the criteria, and the *fabgt_table.duration* for the BGTCODE is blank, the FABGTDUR is used. The default exists for those cases where the duration is blank and no FABGTDUR has been set up.

Insert/Update Logic for *fabgt*

The following insert/update logic exists within *fabgt*:

If any FAITEM decisions exist in the decision tables, they go through the decision processor first.

Results from FAITEM must have a sess, yr, decision code, an amount greater than equal to \$1, and the result code must exist in the *fa_item_table*; the program skips incomplete or incorrect FAITEMs.

If the Overwrite/Replace flag is set to N and a budget (*fabgt_rec*) exists for the selected student, the FAITEMs will update or insert budget items (*fabgtdtl_rec*). The program will update a budget item (*fabgtdtl_rec*) if there is a budget item with the same period (defined as the first two letters of the session and the last two digits of the year), a *bgt_method* (from the *fameth_table* with the financial year and method specified by the user), the financial year entered by the user, and if *ENABLE_MULTIPKG* is set to Y, a schedule of full time is assumed. The program will update the amount regardless of any pre-existing values. However, if the program was unable to find a budget item (*fabgtdtl_rec*), it will try to insert them based on decision table values, but if there is not a budget that matches the period, *bgt_method*, financial year, and if *ENABLE_MULTIPKG* is set to Y, a schedule of full time, no budget item will be inserted.

The process goes to step 9 if the student has a budget and the Overwrite/Replace flag is set to N.

At this point, the program selects BGTCODE or BGTGRP to go through the decision processor.

The *fabgt* program accesses the results from the decision processor. If there is a blank result, it will skip that result; if there is a non-existent result code, *fabgt* will error out and all students that were processed up to that point will roll back to their pre-processed state.

The *fabgt* program uses the first correct result it locates, processing as follows:

- If it is a BGTCODE, the result corresponds to the *fabgt* field in the *fabgt_table*, and the *bgt_code* in the *fabgtas_table*. Each different session in the *fabgtas_table* will have a corresponding budget (*fabgt_rec*). All *fabgtas_table* items will be placed in the *fabgtdtl_rec*.
- If it is a BGTGRP, the result corresponds to the *bgtgrp* field in the *bgtgrp_table* and *bgtgrpas_table*. The *bgt_code* in the *bgtgrpas_table* corresponds to the *fabgt* field in the *fabgt_table* and to the *bgt_code* in the *fabgtas_table*. If there is an invalid *bgt_code*, *fabgt* will roll any processed records back to their pre-processed state. Each different session and/or schedule status will have a corresponding budget (*fabgt_rec*). All *fabgtas_table* items will be stored as budget items (*fabgtdtl_rec*). The

system will check for duplicate schd_stat values in the fabgt_table, generating an error if a duplicate is detected.

- If the Replace/Overwrite flag is set to Y or if the selected student does not have a budget, the program selects FABGTDUR for the decision processor. The amount corresponding to the first result located from the decision processor is stored in a variable for potential later use (i.e., if the fabgt_table does not contain a duration).
- If the ENABLE_PELLCOA macro and the Replace/Overwrite flag are both set to Y, or if the student had a FAITEM update/insert, a fabgt_rec with a BGTCODE of PELL will be created.
- If the Replace/Overwrite flag is set to Y, or the student had a FAITEM update/insert, the program updates the faneed_rec. Every faneed_rec whose method is in the bgt_method field of the fameth_table will be updated. The program locates the appropriate table value by comparing the incoming method to the fameth_table to determine the bgt_method to which it belongs. The program then retrieves all the need methods included within that bgt_method. All of the different methods are retained in a temporary list of methods.

The expected budget (faneed_rec.exp_bgt) is equal to the sum of all the items. If the ENABLE_MULTIPKG is set to Y, only the items that are under the schedule status of FULL are calculated.

Budget duration (faneed_rec.bgt_duration) is set in this order: the value in fabgt_table, the value in FABGTDUR, or a default of 9. If the fabgt_table does not have a budget duration, the next entry is used until the default is finally set. However, if the Overwrite/Replace is set to N, it is updated only if there is no duration (faneed_rec.bgt_duration) in the record as it was originally selected.

Budget group (faneed_rec.bgtgrp) is set to the value of fabgt in the first fabgt_table entry. If the Overwrite/Replace is set to N, it will not reset any pre-existing budget group (faneed_rec.bgtgrp); however, if there is no budget group, the program will use the first fabgt_table.fabgt value located. If the fabgt field in the first fabgt_table row is blank or NULL, the value is set to blank.

Need (faneed_rec.need_amt) is equal to the expected budget minus the total family contribution based on the duration. In other words, if duration is 9 months than the total family contribution would be alternate EFC 9 (faneed_rec.alt9).

Unmet need (faneed_rec.unmet_need) is equal to the need minus the total aid. The total aid is obtained from summing up all of the students aid amts (aid_rec.amt). The criteria for a student's aid to be added into this summing is that it must have the financial aid year that you entered, be a valid aid, the status cannot be N, R, or S and the valid aid in the aid_table must have an aid base (aid_table.aid_base) of value of null or C.

Budget Codes Within *fabgt*

Decision budget codes include the following:

- BGTGRP
- BGTCODE
- FAITEM

- FABTDUR

Note If no criteria exist for a result, the student will pass the result. In addition, if there is no result corresponding to a decision, all the default fields in the `fadec_table` are used instead.

The system does not calculate cents. In other words, if a `fabgtas_table` or `FAITEM` includes cents, the system ignores and drops them. If a `FAITEM` or `fabgtas_table` has an amount that is less than one dollar, the amount will not be inserted or updated in the `fabgtdtl_rec`.

If the `ENABLE_MULTIPKG` macro is set to Y, the student may have multiple budgets with different schedule statuses.

FABGTDUR

The *fabgt* program will use the first result that has a value returned by the decision processor. The amount in the result is the duration. If the duration in the `fabgt_table` is not used, the one returned by `FABGTDUR` is then used. If nothing is returned by `FABGTDUR`, the default 9 is used. This is true only if the Overwrite/Replace flag is set to Y, or there is no duration in the `faneed_rec`.

BGTGRP

Results apply to the `bgtgrp_table` and `bgtgrpas_table`. The program uses the first result from the decision processor in which a `bgtgrpas_table.bgtgrp` field equals the results returned. All of the `bgt_codes` from the `bgtgrpas_table` that equal the `bgtgrp` field of the decision result are then used to create a budget. The `bgt_code` corresponds to the `fabgt` field from the `fabgt_table`, and the `fabgt` field in the `fabgt_table` corresponds to the `bgt_code` in the `fabgtas_table`. The `fabgtas_table` is the budget items. The `ENABLE_MULTIPKG` macro must be set to Y to use `BGTGRP`.

BGTCODE

The results from the decision process directly apply to the `fabgt_table` and the `fabgtas_table`. Only the first result is used from the decision process. Note that if `BGTGRP` is enabled (by setting the `ENABLE_MULTIPKG` macro to Y), `BGTCODE` is not used.

FAITEM

The `dec_code`, amount, session, and year are used from the results once the decision processor is run. If you have `FAITEMs` and `BGTCODEs` in the decision tables, the `FAITEMs` are applied over the `BGTCODE's` budget items.

Example: If you add a `BGTCODE` and it had a budget item of `TUIT` with an amount of \$14000, and the student passed the decision processor for `FAITEM's` `TUIT` of \$25000, the student would then have a `BGTCODE` with an item `TUIT` of \$25000. However, if the `FAITEM` `TUIT` was \$5000, the new `BGTCODE` item `TUIT` would be \$5000. If the student qualifies for a `FAITEM` that is not part of the `BGTCODE`, it will be added to the `BGTCODE`.

If a `FAITEM` is to be used, the decision result code must be in the `fa_item_table`; otherwise, the result will be discarded.

`FAITEMs` can be added without the `BGTCODE`. If the student has a budget code, and the Overwrite/Replace flag is set to N, `FAITEMs` will be updated or inserted.

When the verbose option is set to N, the email sent to the user will indicate all budgets that were added, along with the `FAITEMs`. `FAITEMs` listed in the email

show whether they were inserted or updated, and if updated, both the old amount and the new amount are included.

Note that the student must have an expected budget of zero in the `faneed_rec` before *fabgt* will run on the student.

If a student has received a new budget or new/updated budget item, the program will update the corresponding `faneed_rec`. Expected budget will reflect all of the total items for the student. If `ENABLE_MULTIPKG` is set to Y, only the budgets with a schedule status of full time (F) are used to calculate the expected budget. If the Overwrite/Replace flag is set to Y, or if the duration in the `faneed_rec` is non-existent, the budget duration is changed in this order: `fabgt_table`, decision processor result for `FABGTDUR`, and default 9.

Tables and Records Used in *fabgt*

The *fabgt* program uses the following tables and records:

- `acadsum_rec`
- `adm_rec`
- `aid_rec`
- `bgtgrp_table`
- `bgtgrpas_table`
- `ctc_rec`
- `fabgt_rec`
- `fabgt_table`
- `fabgtas_table`
- `fabgtdlt_rec`
- `fadec_table`
- `fadecrit_table`
- `fadecres_table`
- `faneed_rec`
- `fatran_rec`
- `id_rec`
- `naf_rec`, `naf0809_rec`, ...`naf1213_rec`
- `profile_rec`
- `prog_enr_rec`
- `sap_rec`
- `statsum_rec`
- `stu_acad_rec`
- `stu_serv_res`
- `stu_stat_rec`

- stufa_rec

Parameters Used with *fabgt*

The *fabgt* program works with the following parameters:

-i ID number

Optional – Specifies the ID number of student to be processed; can be more than one.

-y financial aid year

Required – Specifies the financial aid award year processed (e.g., 1213).

-m method

Required – Specifies a financial aid methodology to be used (e.g., FM).

-Y year

Required – Specifies the award year, expressed as a calendar year (e.g., 2011).

-p program

Required – Specifies the academic program on which to process (e.g., UNDg).

-s session

Required – Specifies the session on which you wish to run the process (e.g., FA).

-S site

Required – Specifies the site (e.g., Main).

-o overwrite/replace

Required – If set to Y, the old budget corresponding to the specified method will be overwritten along with the *fabgtdtl_recs* that relate to it. When set to N, if there is an existing budget for the specified method, no budgets will be added; if there is no budget, the student will be processed through the decision processor.

-v verbose

Required – If set to Y, the system sends a decision criteria email that includes all the criteria testing on each student. It will show exactly which criteria and results were met. If set to N, the program sends an abbreviated email.

-r resource

Optional – The *fabgt* program will check the resource code passed as a parameter for all Expected contacts for each student. If a student has an Expected contact with the resource, the student will be processed to see if he/she has met the criteria. This parameter is useful if you want to process a group of students who have an Expected contact for a certain package.

-c complete

Optional – If you use the -r option and set this argument to Y, the Expected contacts for the resource will be completed.

-T trial run

Optional – Run the process without updating the database records.

Sample Email from *fabgt*

The following example shows the email output when the verbose flag is set to N(o).

Student ID = 22541, Financial Year = 1213				
Decision Type	Decision Result	Session	Old Amount	Amount/Duration
BGTCODE	ROBV	FA12		
FAITEM	TUIT		15000.00	1501.00 Update
FAITEM	MISC			52000.00 Insert
BGTCODE	ROBV	SP13		
Student ID = 23026, Financial Year = 1213				
Decision Type	Decision Result	Session	Old Amount	Amount/Duration
BGTCODE	ROBV	FA12		
FAITEM	TUIT		15000.00	1501.00 Update
FAITEM	MISC			52000.00 Insert

In the example BGTCODE ROBV FA09:

- BGTCODE is the decision type.
- ROBV is the fabgt in the fabgt_table.
- FA12 is the session.

In the example FAITEM TUIT 15000.00 1501.00 Update

- FAITEM is the decision type.
- TUIT is the item that was updated/inserted.
- None of the budget items from BGTCODE show up, only the ones from FAITEM.

Sample Email from *fabgt* Using ENABLE_MULTIPKG

The following example shows the email output when the verbose flag is set to No (N) and the ENABLE_MULTIPKG macro is set to Y. Note that the only difference is that the schedule status appears within the email, right after the session.

Student ID = 22541, Financial Year = 1213				
Decision Type	Decision Result	Session	Old Amount	Amount/Duration
FAITEM	CAR	FA12 F	25.00	25.00 Update
FAITEM	CARE	FA12 F	25.00	25.00 Update
FAITEM	MISC	FA12 F	5200.00	5200.00 Update
FAITEM	TUIT	FA12 H	1501.00	1501.00 Update

fadecgrp Program

The Financial Aid product uses *fadecgrp* to assign packages to students who meet specific criteria of your institution. It populates the package group (Pkg Group) and the package flag (Allow Pkg) that display within Financial Aid Need Analysis on the FAFSA screen.

fadecgrp Program Features

This section includes details about the following features within *fadecgrp*:

- Process flows
- Parameters
- Mail message format

Access to *fadecgrp*

The program files for the *fadecgrp* process are located in \$CARSPATH/src/finaid/fadecgrp.

Process Flow for *fadecgrp*

The following describes the data flow in *fadecgrp*. Note that prior to running *fadecgrp*, the user creates criteria in the decision tables for the decision that will be used.

The user executes the *fadecgrp* process, specifying the desired criteria.

The user reviews email for the results.

The user makes corrections to the criteria if necessary and reruns the process if required.

Tables and Records Used in *fadecgrp*

The *fadecgrp* program uses the following tables and records:

- acadsum_rec
- adm_rec
- ctc_rec
- faneed_rec
- fatran_rec
- id_rec
- naf_rec, naf0809_rec, ...naf1213_rec
- profile_rec
- prog_enr_rec
- sap_rec
- statsum_rec
- stu_acad_rec
- stu_serv_rec
- stu_stat_rec
- stufa_rec

Parameters Used with *fadecgrp*

The *fadecgrp* program works with the following parameters:

-i ID number

Optional – Specifies the ID number of student to be processed; can be more than one.

-y financial aid year

Required – Specifies the financial aid award year (e.g., 1213).

-m method

Required – Specifies a financial aid methodology to be used (e.g., PROJ).

-Y year

Required – Specifies the award year, expressed as a calendar year (e.g., 2011).

-p program

Required – Specifies the academic program on which to process (e.g., UNDГ).

-s session

Required – Specifies the session on which you wish to run the process (e.g., FA).

-S site

Required – Specifies the site (e.g., Main).

-o overwrite/replace

Required – If set to Y, the new package will overwrite the old one in the `stufa_rec.pkg_grp`. If set to N and the `stufa_rec.pkg_grp` for the student does not contain a value, then the program will set it to the new package.

-v verbose

Required – If set to Y, the system sends a decision criteria email with all the criteria testing on each student. It will show exactly which criteria and results were met. If set to N, the system sends an abbreviated email, indicating the ID, old package, and new package. This email will list only the IDs that meet the criteria to receive a new package or the default package.

-r resource

Optional – The *fadecgrp* program will check the resource code passed as a parameter for all Expected contacts for each student. If a student has an Expected contact with the resource, the student will be processed to see if he/she has met the criteria. This parameter is useful if you want to process a group of students who have an Expected contact for a certain package.

-c complete

Optional – If you use the -r option and set this argument to Y, the Expected contacts for the resource will be completed.

-T trial run

Optional – Run the process without updating the database records.

Sample Email from *fadecgrp* in Verbose Mode

The following example shows the email output when the verbose flag is set to Y(es).

```

Message Group: PKGGRP Processor

id no. 20204, financial year 1213
=====
Passed - 0 PROF.age (27) > 3 - AND
Failed - 1 ID .ctry ( ) = OH, CA, USA - AND
Failed - 2 SUFA.upd_tm (1459) = 1214 -
AND

result '1' 'PELLOHRS' 'FA' '2011' for 'EN1' ', '600.00' Failed

~~~~~
Processed: priority 1, type PKGGRP, decision MAXPELL , default $400.00 PACKLL
used.

```

In the example Message Group: PKGGRP Processor:

- PKGGRP is the decision process that the user performed.

In the example Passed – 0 PROF.age (27) > 3 – AND

- The first statement indicates whether it passed or failed the criterion.
- The zero after “Passed” is the sequence.
- “*PROF*” is the structure that is currently being used.
- “*Age*” is a member of the structure of “*PROF*”.
- The “(27)” is the value in “*PROF.age*”.
- “>” is the test operator.
- “3” is the value for the criterion.
- “AND” is the connector of this criterion to the next one.

In the example result '1' 'PELLOHRS' 'FA' '2011' for 'EN1' ', '600.00' Failed

- “1” is the priority.
- “PELLOHRS” is the code to identify a decision result.
- “FA” is the session.
- “2011” is the year.
- “EN1” identifies the resulting decision code to be assigned.
- “6000.00” is the amount of award or budget.

In the example Processed: priority 1, type PKGGRP, decision MAXPELL , default \$400.00 PACKLL used.

- “Processed” indicates what has been processed.
- “priority 1” is the priority of this decision.
- “PKGGRP” is the decision type.
- “MAXPELL” is the decision.
- “default” indicates that, since the result failed, the system used the default.
- “\$400.00” is the default amount.
- “PACKLL” is the default code.

Sample Email from *fadecgrp* in Non-verbose Mode

The following example shows the email output when the verbose flag is set to N(o).

ID#	Previous Package	New Package
16	JIMX	ATT
502	PELL	ATT
1005	ROB	VAL
1010	NULL	ATT

In the example 16 JIMX ATT

- “16” is the student’s ID number.
- “JIMX” is the student’s previous package.
- “ATT” is the student’s new package.

The package is stored in the *stufa_rec.pkg_grp* and the student ID is stored in the *stufa_rec.id*.

fadec Program

The *fadec* program tests the decision process on a selected student so you can ensure your tables are set up correctly before you put them into production. The benefit of using the test program is that you can view the result of processing a student without awarding a package.

fadec Program Features

This section includes details about the following features within *fadec*:

Process flows

Parameters

Mail message format

Access to *fadec*

The program files for the *fadec* process are located in *\$CARSPATH/src/finaid/fadec*.

Process Flow for *fadec*

The following describes the data flow in *fadec*. Note that prior to running *fadec*, the user creates criteria in the decision tables for the decision that will be used.

- The user executes the *fadec* process, specifying the desired criteria and a test ID.
- The user reviews email for the results.
- The user makes corrections to the criteria if necessary and reruns the process if required.

Tables and Records Used in *fadec*

The *fadec* program uses the following tables and records:

- acadsum_rec
- adm_rec
- ctc_rec
- faneed_rec
- fatran_rec
- id_rec
- naf_rec, naf0809_rec, ...naf1213_rec
- profile_rec
- prog_enr_rec
- sap_rec
- statsum_rec
- stu_acad_rec
- stu_serv_rec
- stu_stat_rec
- stufa_rec

Parameters Used in *fadec*

The *fadec* program works with the following parameters:

-i ID number

Optional – Specifies the ID number of the student to be tested.

-y financial aid year

Required – Specifies the financial aid award year to be tested.

-m method

Required – Specifies the financial aid methodology to use for the test.

-Y year

Required- Specifies the award year to be teste, expressed as a calendar year (e.g., 2011).

-p program

Required – Specifies the academic program on which to test (e.g., UNDG).

-s session

Required – Specifies the session on which you want to run the test (e.g., FA).

-S site

Required – Specifies the site (e.g., Main).

-d decision processor

Required – Specifies which process to use for the test (e.g., MAXPKGAM).

Sample Email from *fadec*

The following example shows the email output from *fadec*. Note that, for this program, the message cannot be altered with a Verbose flag parameter because you need to see all the information in the message to fully test your tables.

```

Message Group: MAXPKGAM Processor

id no. 20204, financial year 1213
=====
Passed - 0  PROF.age (27) > 3 - AND
Failed - 1  ID .ctry ( ) = OH, CA, USA - AND
Failed - 2  SUFA.upd_tm (1459) = 1214 - AND

result '1' 'PELLOHRS' 'FA' '2011' for 'EN1' ', '600.00' Failed

~~~~~
Processed: priority 1, type MAXPKGAM, decision MAXPELL , default $400.00 PACKLL
used.

```

In the example Message Group: MAXPKGAM Processor

- “MAXPKGAM” is the decision process that the user tested.

In the example Passed – 0 PROF.age (27) > 3 – AND

- The first statement indicates whether it passed or failed the criterion.
- The zero after “Passed” is the sequence.
- “*PROF*” is the structure that is currently being used.
- “*Age*” is a member of the structure of “*PROF*”.
- The “(27)” is the value in “*PROF.age*”.
- “>” is the test operator.
- “3” is the value for the criterion.
- “AND” is the connector of this criterion to the next one.

In the example result '1' 'PELLOHRS' 'FA' '2011' for 'EN1' ', '600.00' Failed

- “1” is the priority.
- “PELLOHRS” is the code to identify a decision result.
- “FA” is the session.
- “2011” is the year.
- “EN1” identifies the resulting decision code to be assigned.
- “6000.00” is the amount of award or budget.

In the example Processed: priority 1, type MAXPKGAM, decision MAXPELL , default \$400.00 PACKLL used.

- “Processed” telling you what has been processed.
- “priority 1” is the priority of this decision.
- “MAXPKGAM” is the decision type.
- “MAXPELL” is the decision.

- “default” indicates that, since the result failed, the system used the default.
 - “\$400.00” is the default amount.
- “PACKLL” is the default code.



Menus, Screens, and Scripts

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

- Menu source files
- Menu option files
- PERFORM screens
- SQL scripts
- Csh scripts

Directory Locations

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

Menu source files:

\$CARSPATH/menusrc/student/finaid

Menu option files:

\$CARSPATH/menuopt/finaid/:

- others
- reports
- scripts
- informers
- programs
- screens

PERFORM screens:

\$CARSPATH/modules/finaid/screens

Form screens:

\$CARSPATH/modules/finaid/forms

SQL scripts:

\$CARSPATH/modules/finaid/informers

Csh scripts:

\$CARSPATH/modules/finaid/scripts

Financial Aid Menu

The CX menu source (menusrc) directory path contains definitions of the CX menu structure. Specifically, the \$CARSPATH/menusrc/student/finaid directory path contains definitions for Financial Aid menus.

Financial Aid Menu Structure

The following menu source (*menusrc*) directories correspond to the Financial Aid menus on the CX menu system.

Financial Aid: Tape Conversion Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tpconv/

Financial Aid: Update Tape/ ISIR SS Num Menu

Menu source directory:

\$CARSPATH/menusrc/student/finaid/process/fayrrecs/

Financial Aid: Student Processing Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/process/

Student Processing: Automated Packaging Menu

Menu source directory: \$CARSPATH/

menusrc/student/finaid/process/fapkg/

Student Processing: Award/Cover Letter Menu

Menu source directory: \$CARSPATH/

menusrc/student/finaid/process/awdlet/

Student Processing: EDE Processing Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/process/ede/

Student Processing: EDE Processing: Update Tape/ISIR SS Numbers

Menu source directory:

\$CARSPATH/menusrc/student/finaid/process/fayrrecs/

Student Processing: COD Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/process/cod/

Student Processing: COD: Reports Menu

Menu source directory:

\$CARSPATH/menusrc/student/finaid/process/cod/reports

Student Processing: Refundable Aid Menu

Menu source directory:

\$CARSPATH/menusrc/student/finaid/process/ckwrtg/

Note This option is available if the macro ENABLE_FEE_COLLECTION is set to Y.

Student Processing: Refundable Aid: Reports Menu

Menu source directory:

\$CARSPATH/menusrc/student/finaid/process/ckwrtg/reports

Note This option is available if the macro ENABLE_FEE_COLLECTION is set to Y.

Student Processing: SAP Processing Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/process/sap/

Student Processing: Web Aid Accept Processing Menu

Menu source directory:

\$CARSPATH/menusrc/student/finaid/process/aidaccept/

Note This menu option is available if the macro ENABLE_MOD_CRM_STUDENT is set to Y.

Financial Aid: Document Tracking Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/fadoc/

- \$CARSPATH/menusrc/student/finaid/fadoc/letters
- \$CARSPATH/menusrc/student/finaid/fadoc/reports

Financial Aid: Document Tracking: Reports Menu

*Menu source directory:
\$CARSPATH/menusrc/student/finaid/fadoc/reports/*

Financial Aid: Document Tracking: Letters Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/fadoc/letters/

Financial Aid: Document Tracking: Letters: Tickler Menu

*Menu source directory:
\$CARSPATH/menusrc/student/finaid/fadoc/letters/tracking/*

Financial Aid: Loan Tracking Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/

- \$CARSPATH/menusrc/student/finaid/loan/reports
- \$CARSPATH/menusrc/student/finaid/loan/tables

Loan Tracking: COD Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/cod/

Loan Tracking: COD Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/reports/

Loan Tracking: FFELP Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/ffelp/

Loan Tracking: CRC Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/crc/

Loan Tracking: Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/reports/

Loan Tracking: Table Maintenance Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/loan/tables/

Financial Aid: Data Display Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/recmaint/

Financial Aid: Audits Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/audit/

Financial Aid: Aid Disbursement Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/fapost/

Financial Aid: Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/

Note You also access the Payroll/Personnel: College Work Study Program Menu from the Financial Aid: Reports Menu.

Reports: Aid Reports Menu

Menu source directory:
\$CARSPATH/menusrc/student/finaid/reports/aidrpt/

Reports: Aid Transactions Menu

Menu source directory:
\$CARSPATH/menusrc/student/finaid/reports/transrpt/

Reports: FISAP Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/fisap/

Reports: Gainful Employment Menu

Menu source directory:
\$CARSPATH/menusrc/student/finaid/reports/gainemp/

Financial Aid Audits Reports Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/reports/audit/

Financial Aid: PowerFAIDS Integration Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/pfaids/

Note This menu option is available if the macro ENABLE_FEAT_POSERFAIDS is set to Y.

Financial Aid: Table Maintenance Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/

Table Maintenance: Aid Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/aidtbl/

Table Maintenance: Need Analysis Menu

Menu source directory:
\$CARSPATH/menusrc/student/finaid/tables/needtbl/

Table Maintenance: Packaging Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/pkgtbl/

Table Maintenance: Budget Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/bgtbl/

Table Maintenance: Compliance Tables Menu

Menu source directory:
\$CARSPATH/menusrc/student/finaid/tables/cplytbl/

Table Maintenance: Contact/Tickler Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/ctctbl/

Table Maintenance: Decision Processor Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/dectbl/

Table Maintenance: Enrollment Status Tables Menu

Menu source directory:

\$CARSPATH/menusrc/student/finaid/tables/schdtbl/

Table Maintenance: Verification Tables Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/vertbl/

Table Maintenance: SAP Table Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/saptbl/

Table Maintenance: Financial Aid WEB Table Menu

Menu source directory:

\$CARSPATH/menusrc/student/finaid/tables/webtbl/

Table Maintenance: COD Table Menu

Menu source directory: \$CARSPATH/menusrc/student/finaid/tables/codtbl/

Each directory above contains a *menudesc* file, which specifies what menu options appear in a menu. Specific menu options, however, are defined in the menu option (menuopt) directory path.

Menu Options

The following list associates each Financial Aid program, screen and script menu option and corresponding menuopt file and identifies the menuopt locations and what the menu option accesses.

Financial Aid: Need Analysis Tape Conversion Menu

Extract Need Tape Data

Csh script: \$CARSPATH/modules/finaid/scripts/tpext

Menu Access: \$CARSPATH/menuopt/finaid/scripts/tpext

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_AGENCY (agency that provided the tape)
- PP_FORMAT (format of the tape)
- PP_FORM (media format of information)
- PP_PATH (full path and name of file)

Leads from Applicant Info

Csh script: \$CARSPATH/modules/finaid/reports/natplead

Menu Access: \$CARSPATH/menuopt/finaid/reports/natplead

ID Data Entry

Program: \$CARSPATH/src/common/identry

Menu Access: \$CARSPATH/menuopt/common/programs/ide.fa

Parameters Passed:

- -a (automatic query mode)
- -F (force query mode)
- -D 3 (debug level 3)

- -f indiv_1 (form: \$CARSPATH/modules/common/progscr/indiv1)

Load Tape Data

Program: \$CARSPATH/src/finaid/natp

Menu Access: \$CARSPATH/menuopt/finaid/programs/natp.lyt

Parameters Passed:

- -l (subsidiary)
- -y PP_YEAR (financial aid award year)
- -a PP_AGENCY (agency that provided the tape)
- -t PP_FORMAT (format of the tape)
- -r PP_OPTION (report option only)
- -o PP_OVER (allow process to override existing financial aid records)
- -v PP_PRINT (verbose mode to report all adds/updates)

Load Tape/ISIR Data by SSN

Program: \$CARSPATH/src/finaid/natp

Menu Access: \$CARSPATH/menuopt/finaid/programs/natp.lyts

Parameters Passed:

- -l (subsidiary)
- -y (financial aid award year)
- -a PP_AGENCY (agency that provided the tape)
- -t PP_FORMAT (format of the tape)
- -s PP_NUM (social security number)
- -r PP_OPTION (report option only)
- -o PP_OVER (allow process to override existing financial aid records)
- -v PP_PRINT (verbose mode to report all adds/updates)

Financial Aid: Tape Conversion: Update Tape/ISIR SS Num Menu**1213 ISIR Records**

Screen: \$CARSPATH/modules/finaid/screens/natp1213

Menu Access: \$CARSPATH/menuopt/finaid/screens/natp1213

1112 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp1112

Menu Access: \$CARSPATH/menuopt/finaid/screens/natp1112

1011 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp1011

Menu Access: \$CARSPATH/menuopt/finaid/screens/natp1011

0910 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp0910

Menu Access: \$CARSPATH/menuopt/finaid/screens/natp0910

0809 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp0809

Menu Access: \$CARSPATH/menuopt/finaid/screens/natp0809

0708 and Previous ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp

Menu Access: \$CARSPATH/menuopt/finaid/screens/natp

Financial Aid: Student Processing Menu**Student Need Analysis**

Program: \$CARSPATH/src/finaid/fanecd

Menu Access: \$CARSPATH/menuopt/finaid/programs/fa

Parameters Passed:

- -y *award year* (financial aid award year)
- -s *session* (current session)
- -L \${CARSPATH} (default site)

Financial Aid Entry

Program: \$CARSPATH/src/finaid/faentry

Menu Access: \$CARSPATH/menuopt/finaid/programs/fae.lv

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -v (verify compliance)
- -L \${CARSPATH} (default site)

Print Text Comments

Script: \$CARSPATH/modules/finaid/scripts/prtext

Menu Access: \$CARSPATH/menuopt/finaid/scripts/prtext

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_ID_BEG (ID number)
- PP_ID_END (ID number)
- PP_OUTPUT (output)

Student Processing: Automated Packaging Menu**Financial Aid Entry**

Program: \$CARSPATH/src/finaid/faentry

Menu Access: \$CARSPATH/menuopt/finaid/programs/fae.lv

Parameters Passed:

- -I SUBS_SA_DEF (S/A subsidiary)
- -v (verify compliance)
- -L \${CARSPATH} (default site)

Package Parameters

Screen: \$CARSPATH/modules/finaid/screens/ppkg

Menu Access: \$CARSPATH/menuopt/finaid/screens/ppkg

Update Package Allow Flag

SQL script: \$CARSPATH/modules/finaid/informers/allowpkg

Menu Access: \$CARSPATH/menuopt/finaid/informers/allowpkg

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_CODE (packaging group code)
- PP_ALLOW (allow packaging y/n)

Update Simulated Pkg Amts

SQL script: \$CARSPATH/modules/finaid/informers/updpkgamt

Menu Access: \$CARSPATH/menuopt/finaid/informers/updpkgamt

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_METHOD (packaging method)

Financial Aid Packaging

Program: \$CARSPATH/src/finaid/faentry

Menu Access: \$CARSPATH/menuopt/finaid/programs/fae.lyspP

Parameters Passed:

- -l SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -s PP_SESS (session)
- -p PP_PROG (program to be packaged)
- -P PP_PARAM (packaging parameter code)
- -L \${CARSPATH} (default site)

Recalc Batch

Program: \$CARSPATH/modules/finaid/batchcalc

Menu Access: \$CARSPATH menuopt/finaid/programs/batchcalc

Parameters Passed:

- -y (financial aid award year)
- -s (session)
- -Y (calendar year)
- -p (program)
- -L (site)

Fund Balances Report

Report: \$CARSPATH/modules/finaid/reports/tpkgamt

Menu Access: \$CARSPATH/menuopt/finaid/reports/tpkgamt

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_PROG (program to be packaged)
- PP_METHOD (beginning method)
- PP_METHOD (ending method)

Note This option appears when ENABLE_FEAT_MULTIPKG is set to Y.

Print Aid Simulations

Program: \$CARSPATH/modules/finaid/reports/aidsim

Menu Access: \$CARSPATH/menuopt/finaid/reports/aidsim

Parameters Passed:

- PP_METHOD (beginning method)
- PP_METHOD (ending method)
- PP_YEAR (financial aid award year)
- PP_PROG (program to be packaged)

Update Package to Accepted

Program: \$CARSPATH/modules/finaid/informers/accptpkg

Menu Access: \$CARSPATH/menuopt/finaid/informers/accptpkg

Parameters Passed:

- DFAYR (Financial aid year to update)

Delete Simulation Records

SQL script: \$CARSPATH/modules/finaid/informers/delsim

Menu Access: \$CARSPATH/menuopt/finaid/informers/delsim

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_METHOD (packaging method)
- PP_PROG (program to be packaged)

Add Need Records/Fixed Adj

SQL script: \$CARSPATH/modules/finaid/informers/addproj

Menu Access: \$CARSPATH/menuopt/finaid/informers/fixproj

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_METHOD (packaging method)
- PP_AMOUNT (adjustment amount)

Add Need Records/Pct Adj

SQL script: \$CARSPATH/modules/finaid/informers/addproj

Menu Access: \$CARSPATH/menuopt/finaid/informers/pctproj

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_METHOD (packaging method)

- PP_PERCENT (adjustment percentage)

Student Processing: Award/Cover Letter Menu**Select Award Notices**

Program: \$CARSPATH/src/finaid/faentry

Menu Access:\$CARSPATH/menuopt/finaid/programs/fae.lyscfr

Parameters Passed:

- -l SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -s PP_SESS1 (session)
- -s PP_SESS2 (session)
- -s PP_SESS3 (session)
- -s PP_SESS4 (session)
- -c PP_SESS (current session)
- -f PP_FORM (award notification form)
- -r PP_DATE (return date)
- -L \${CARSPATH} (default site)

Print Award Notices

Program: \$CARSPATH/src/util/fps

Menu Access:\$CARSPATH/menuopt/utilities/programs/fps.f Kent

Create Cover Letters

SQL script: \$CARSPATH/modules/common/scripts/lbrun

Menu Access:\$CARSPATH/menuopt/finaid/scripts/ltrfacover

Parameters Passed:

- PP_LTB_SELECT (letters, labels, both, none)
- PP_TICK (tickler code)
- PP_DATE (date)
- PP_DATE (date)
- PP_YEAR (financial aid award year)

Print Award/Cover Letters

Program: \$CARSPATH/src/util/lps

Menu Access:\$CARSPATH/menuopt/utilities/programs/lps.faa

Schedule Initial Letters

Script: \$CARSPATH/finaid/informers/anform

Menu Access:\$CARSPATH/menuopt/finaid/informers/anform

Parameters Passed:

- – DFAYR (Financial aid year)

Financial Aid: EDE Processing Menu**Student Need Analysis**

Program: \$CARSPATH/src/finaid/faneed

Menu Access: \$CARSPATH/menuopt/finaid/programs/fa

Parameters Passed:

- -y *award year* (financial aid award year)
- -s *session* (current session)
- -L \${CARSPATH} (default site)

Input ISIR Data

Csh script: \$CARSPATH/modules/finaid/scripts/esarin

Menu Access: \$CARSPATH/menuopt/finaid/scripts/esarin

Parameters Passed:

- FA_YR_DEF (default financial aid award year)
- GES

Load ISIR Data by SSN

Program: \$CARSPATH/src/finaid/natp

Menu Access: \$CARSPATH/menuopt/finaid/programs/natp2.lyts

Parameters Passed:

- -l (subsidiary)
- -y PP_YEAR (financial aid award year)
- -a GES
- -t GES
- -s PP_NUM (social security number)
- User specification: -o PP_OVER (allow process to override existing financial aid records)
- User specification: -v PP_PRINT (verbose mode to report all adds/updates)

ID Data Entry

Program: \$CARSPATH/src/common/identry

Menu Access: \$CARSPATH/menuopt/common/programs/ide.fa

Parameters Passed:

- -a (automatic query mode)
- -F (force query mode)
- -D 3 (debug level 3)
- -f indiv_1 (form: \$CARSPATH/modules/common/progscr/indiv1)

Create Corrections File

Program: \$CARSPATH/src/finaid/faneed

Menu Access: \$CARSPATH/menuopt/finaid/programs/facor

Parameters Passed:

- -y PP_YEAR (financial aid award year)
- -o GES
- -L \${CARSPATH} (default site)

Create Orig. Appl. File

Program: \$CARSPATH/src/finaid/fanecd

Menu Access:\$CARSPATH/menuopt/finaid/programs/faorig

Parameters Passed:

- -y PP_YEAR (financial aid award year)
- -O GES
- -L \${CARSPATH} (default site)

After Original Format

SQL script: \$CARSPATH/modules/finaid/informers/updexport

Menu Access:\$CARSPATH/menuopt/finaid/informers/updexport

Parameters Passed:

- PP_YEAR (financial aid award year)

Leads from Applicant Info

SQL script: \$CARSPATH/modules/finaid/report/natplead

Menu Access:\$CARSPATH/menuopt/finaid/reports/natplead

Parameters Passed:

- Year (financial aid award year)
- Agency (source agency)
- Format (format of input data)
- Date (selection date)
- Omit(ignore students with already existing ID records)
- -f (standard report output format)

ISIR Data Comparison

Report: \$CARSPATH/modules/finaid/reports/isircmp

Menu Access:\$CARSPATH/menuopt/finaid/reports/isircmp

Parameters Passed:

- PP_ACAD_YEAR (academic year)
- PP_NUM (Social Security number)
- Admission status
- PP_PROG (academic program)
- PP_SESS (academic session)
- PP_YEAR (financial aid award year)
- Registration status
- Date added
- EFC changes only

Import ACG Data Files

SQL script: \$CARSPATH/modules/finaid/informers/importACG

Menu Access: \$CARSPATH/menuopt/finaid/informers/importACG

Parameters Passed:

- PP_YEAR (financial aid award year)

Financial Aid: EDE Processing: Update Tape/ISIR SS Num Menu**1213 ISIR Records**

Screen: \$CARSPATH/modules/finaid/screens/natp1213

Menu Access: \$CARSPATH/menuopt/ finaid/screens/natp1213

1112 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp1112

Menu Access: \$CARSPATH/menuopt/ finaid/screens/natp1112

1011 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp1011

Menu Access: \$CARSPATH/menuopt/ finaid/screens/natp1011

0910 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp0910

Menu Access: \$CARSPATH/menuopt/ finaid/screens/natp0910

0809 ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp0809

Menu Access: \$CARSPATH/menuopt/ finaid/screens/natp0809

0708 and previous ISIR Records

Screen: \$CARSPATH/modules/finaid/screens/natp

Menu Access: \$CARSPATH/menuopt/ finaid/screens/natp

Student Processing: COD Menu**Create COD Pell Records**

Program: \$CARSPATH/src/finaid/rfms

Menu Access: \$CARSPATH/menuopt/finaid/programs/rfms.yoC

Parameters Passed:

- -y (year)
- -o (parameter to create original Pell file)
- -C (parameter to create COD orig/dish)
- -T Trial Run. Y/N to enable/disable Trial Run. Runs the process without updating the database records.

Release Disbursements

Program: \$CARSPATH/src/finaid/faupdrel

Menu Access: \$CARSPATH/menuopt/finaid/programs/faur.ymYpsS

Parameters Passed:

- -y (award year)
- -m (method)
- -Y (academic year)
- -s (session)
- -p (release previous sessions)
- -S (site)

Pell Entry*Program: \$CARSPATH/src/finaid/rfmsentry**Menu Access:\$CARSPATH/menuopt/finaid/programs/rfme.y**Parameters Passed:*

- -y PP_YEAR (financial aid award year)

Export COD Batch*Perl script: \$CARSPATH/modules/finaid/commands/ExportCOD.pl**Menu Access:\$CARSPATH/menuopt/finaid/scripts/codexport**Parameters Passed:*

- -y (award year)
- -f (XML file prefix)
- -t (export type; valid values are P(ell), D(irect Loan) or B(oth))
- -V (Verbose flag)
- -D (Dry run flag; creates XML file without updating database)
- -z (ID: Export one student by the input ID number)

Import COD Batch*Perl script: \$CARSPATH/modules/finaid/commands/ImportCOD.pl**Menu Access:\$CARSPATH/menuopt/finaid/scripts/codimport**Parameters Passed:*

- -f (XML file prefix)
- -V (Verbose flag)
- -D (Dry run flag; creates XML file without updating database)

Update Allow Sync to No*Script: \$CARSPATH/modules/finaid/informers/disallupd**Menu Access:\$CARSPATH/menuopt/finaid/scripts/disallupd**Parameters Passed:*

- -DFAYR (financial aid year)
- -DPROG_CODE (program)

Student Processing: COD Reports Menu**Pell Report***Script: \$CARSPATH/modules/finaid/reports/rfms*

Menu Access: \$CARSPATH/menuopt/finaid/reports/rfms

Parameters Passed:

- PP_YEAR
- Action Code

Pell Exceptions

Script: \$CARSPATH/ modules/finaid/reports/rfmsexcpn

Menu Access: \$CARSPATH/menuopt/finaid/reports/rfmsexcpn

Parameters Passed:

- PP_YEAR
- PP_SESS
- PP_ACAD_YR
- Grant Type

ACG/SMART Grant Report

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

Menu Access: \$CARSPATH/menuopt/finaid/reports/codgrant

Parameters Passed:

- PP_YEAR
- Action Code

XML Batch Report

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

Menu Access: \$CARSPATH/menuopt/finaid/reports/faxmlbch

Parameters Passed:

- PP_STATUS
- Batch number
- Starting Date
- Ending Date

COD Student Batch Report

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

Menu Access: \$CARSPATH/menuopt/finaid/reports/fastubch

Parameters Passed:

- PP_ID
- Batch number
- Starting Date
- Ending Date

COD Pell Reconciliation

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

Menu Access: \$CARSPATH/menuopt/finaid/reports/pellhist

Parameters Passed:

- PP_ID

- PP_YEAR
- Starting Date
- Ending Date
- Grant Type

Compare YTD Report

Script: \$CARSPATH/modules/finaid/commands/formatReport.pl

Menu Access: \$CARSPATH/menuopt/finaid/reports/cmpcodytd

Parameters Passed:

- -f (input report filename)
- -t (comparison report)
- -r (rejected/nullified awards)

Format COD Reports

Script: \$CARSPATH/modules/finaid/commands/formatReport.pl

Menu Access: \$CARSPATH/menuopt/finaid/scripts/formatReport

Parameters Passed:

- -f (input report filename)
- -t (standard report)

Note The obsolete YTD Records Report has been removed from the menu. Use Report->Format COD Reports to get a readable version of the file and Report->Compare YTD Report to compare the file with the database records.

Financial Aid: SAP Processing Menu

Select FA Awarded SAP IDs

SQL script: \$CARSPATH/modules/finaid/informers/selsapids

Menu Access: \$CARSPATH/menuopt/finaid/informers/selsapids

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_TICK (tickler code)
- PP_CTC_RESRC (contact resource)
- PP_SESS (first session)
- PP_ACAD_YEAR (financial aid award year of first session)
- PP_SESS2 (second session)
- PP_ACAD_YEAR (financial aid award year of second session)
- PP_SESS3 (third session)
- PP_ACAD_YEAR (financial aid award year of third session)
- PP_SESS4 (fourth session)
- PP_ACAD_YEAR (financial aid award year of fourth session)
- PP_PROG (academic program)

Select FA Unawarded SAP IDs

SQL script: \$CARSPATH/modules/finaid/informers/selsapunawd

Menu Access:\$CARSPATH/menuopt/finaid/informers/selsapunawd

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_TICK (tickler code)
- PP_CTC_RESRC (contact resource)
- PP_SESS (first session)
- PP_ACAD_YEAR (financial aid award year of first session)
- PP_SESS2 (second session)
- PP_ACAD_YEAR (financial aid award year of second session)
- PP_SESS3 (third session)
- PP_ACAD_YEAR (financial aid award year of third session)
- PP_SESS4 (fourth session)
- PP_ACAD_YEAR (financial aid award year of fourth session)
- PP_PROG (academic program)

SAP Listing

SQL script: \$CARSPATH/modules/common/reports/saplist

Menu Access:\$CARSPATH/ menuopt/modules/common/saplist

Parameters Passed:

- PP_SESS (session)
- PP_YEAR (financial aid award year]
- PP_PROG (program)
- PP_SAP_TRACK (SAP track)
- PP_SAP_CODE (SAP code)
- PP_DATE_BEG (beginning date)
- PP_DATE_END (end date)
- PP_ID_BEG (beginning ID)
- PP_ID_END (end ID)

Contact Range

SQL script: \$CARSPATH/modules/finaid/reports/ctcrange

Menu Access:\$CARSPATH/modules/finaid/report/ctcrange

Parameters Passed:

- PP_TICK (tickler code)
- PP_PROG (program)
- PP_STATUS (status)
- PP_FIRST (contact)
- PP_SECOND (comments)

SAP Compliance Process

Program: \$CARSPATH/src/finaid/fasap,
\$CARSPATH/finaid/programs/fasapcply

Menu Access:\$CARSPATH/menueopt/finaid/programs/fsap.rtcysYL,
\$CARSPATH/menueopt/finaid/programs/fsapcply

Parameters Passed:

- PP_TICK (tickler code)
- PP_CTC_RESRC (contact resource)
- PP_FA_YR (financial aid award year)
- PP_SESS (session)
- PP_YEAR (financial aid award year)
- PP_PROG (program)
- PP_SAP_TRACK (SAP track code)
- PP_SAP_CRIT (SAP criteria)
- PP_SAP_PASS (SAP pass criteria)
- PP_SAP_FAIL (SAP fail criteria)

SAP Action Process

Program: \$CARSPATH/src/finaid/fasap,
\$CARSPATH/finaid/programs/fasapact

Menu Access:\$CARSPATH/menueopt/finaid/programs/fsap.rtysYLA,
\$CARSPATH/menueopt/finaid/programs/fasapact

Parameters Passed:

- PP_SAP_TRACK (SAP track code)
- PP_TICK (tickler code)
- PP_CTC_RESRC (contact resource)
- PP_FA_YR (financial aid award year)
- PP_SESS1 (first session)
- PP_YEAR (financial aid award year)
- PP_SESS2 (second session)
- PP_YEAR (financial aid award year)
- PP_SESS3 (third session)
- PP_YEAR (financial aid award year)
- PP_SESS4 (fourth session)
- PP_YEAR (financial aid award year)
- PP_PROG (academic program)

Student Processing: Web Aid Accept Processing Menu

Note This menu is available if the macro ENABLE_MOD_CRM_STUDENT is set to Y.

Award Choices Report

Program: \$CARSPATH/modules/finaid/reports/aidchoice

Menu Access: \$CARSPATH/menuopt/finaid/reports/aidchoice

Parameters Passed:

- PP_YEAR (financial aid award year)

Process Award Choices

Program: \$CARSPATH/scripts/finaid/syncchoice

Menu Access: \$CARSPATH/menuopt/finaid/scripts/syncchoice

Parameters Passed:

- ID (up to 10)

Financial Aid: Student Processing Menu**Aid State Batch Update**

Program: \$CARSPATH/src/finaid/aidstatbch

Menu Access: \$CARSPATH/menuopt/finaid/programs/aidstatbch

Parameters Passed:

- -y (year)
- -d (financial aid code)
- -s (financial aid status code)
- -f (filename)

Financial Aid: Document Tracking Menu**Contact Entry/Display**

Program: \$CARSPATH/src/finaid/ctcentry

Menu Access: \$CARSPATH/menuopt/finaid/programs/ctce

Parameters Passed:

- -a (automatic query mode)
- -F (force query mode)
- -y PP_YEAR (financial aid award year)
- -f stufa_1 (form:
\$CARSPATH/modules/finaid/progscr/ctcentry/stufa_1)
- -D 3 (debug level 3)

Contact Batch Entry

Program: \$CARSPATH/src/common/ctcbatch

Menu Access: \$CARSPATH/menuopt/common/programs/ctcbatch

Parameters Passed:

- -t PP_TICK (tickler code)
- -r PP_CTC_RESRC (contact resource)
- -s PP_STATUS (contact status)
- -d PP_DATE_DUE (contact due date)

- -f PP_FILE (filename for contacts)

Re-run Contact Batch Entry

Program: \$CARSPATH/src/common/ctcbatch

Menu Access: \$CARSPATH/menuopt/common/programs/ctcbatchr

Parameters Passed:

- -R (run in batch mode)

Document Review Script

Csh script: \$CARSPATH/modules/finaid/scripts/docrev

Menu Access: \$CARSPATH/menuopt/finaid/scripts/docrev

Parameters Passed:

- PP_TICK (tickler code)
- PP_YEAR (financial aid award year)

Copy Contacts Forward

Informer: \$CARSPATH/informers/finaid/addctc

Menu Access: \$CARSPATH/menuopt/finaid/informers/addctc

Parameters Passed:

- Previous tickler code
- New tickler code
- New tickler year
- Contacts to create with Expected status(up to 10 for any given run)

Document Tracking: Reports Menu**MNU_OPT(finaid/reports/ctcfaedit)****Contact Status**

Report: \$CARSPATH/menuopt/finaid/reports/ctcstatus

Menu Access: \$CARSPATH/modules/finaid/reports/ctcstatus

Parameters Passed:

- Tickler
- Program
- Status
- ID#
- New Page

Contact Range

Report: \$CARSPATH/menuopt/finaid/reports/ctcrange

Menu Access: \$CARSPATH/modules/finaid/reports/ctcrange

Parameters Passed:

- Tickler
- Program

- Status (of contact)
- First (Beginning contact of range)
- Second (Ending contact of range)

Verification

Report: \$CARSPATH/menuopt/finaid/reports/pellverify

Menu Access: \$CARSPATH/modules/finaid/reports/pellverify

Parameters Passed:

- Tickler
- Status (of contact)
- Contact
- Program

Ready to Package

Report: \$CARSPATH/menuopt/finaid/reports/package

Menu Access: \$CARSPATH/modules/finaid/reports/package

Parameters Passed:

- Tickler
- Program
- Date

Outstanding FA Transcripts

Report: \$CARSPATH/menuopt/finaid/reports/transreq

Menu Access: \$CARSPATH/modules/finaid/reports/transreq

Parameters Passed:

- Year (academic)
- Tickler

Package Termination

Report: \$CARSPATH/menuopt/finaid/reports/termaid

Menu Access: \$CARSPATH/modules/finaid/reports/termaid

Parameters Passed:

- Tickler
- Date

Contacts/Deleted ISIR Edit Codes

Report: \$CARSPATH/menuopt/finaid/reports/ctcfaedit

Menu Access: \$CARSPATH/modules/finaid/reports/ctcfaedit

Parameters Passed:

- Tickler
- Status

Document Tracking: Letters Menu**Select Status Letter – One**

Screen: \$CARSPATH/modules/finaid/screens/statusctc

Menu Access: \$CARSPATH/menuopt/finaid/screens/statusctc

Select Status Letters – All

SQL script: \$CARSPATH/modules/finaid/informers/statctc

Menu Access: \$CARSPATH/menuopt/finaid/informers/statctc

Parameters Passed:

- PP_TICK (contact tickler code)
- PP_CTC_RESRC (contact resource code)
- -DCOMM LETT (contact communication value: letters)
- -DDUEDATE PP_DATE (contact due date)
- -DACERPT (ACE report)

Create Status Letters

Csh script: \$CARSPATH/modules/common/scripts/ltrbrun

Menu Access: \$CARSPATH/menuopt/finaid/scripts/ltrfastat

Parameters Passed:

- PP_LTB_SELECT (letters, labels, both, none)
- PP_TICK (tickler code)
- PP_DATE (date)
- PP_DATE (date)

Create Other Letters

Csh script: \$CARSPATH/modules/finaid/scripts/ltrstatctc

Menu Access: \$CARSPATH/menuopt/finaid/scripts/ltrstatctc

Parameters Passed:

- PP_LTB_SELECT (letters, labels, both, none)
- PP_TICK (tickler code)
- PP_DATE (date)
- PP_DATE (date)
- PP_YEAR (financial aid award year)

Print Letters

Program: \$CARSPATH/src/util/lps

Menu Access: \$CARSPATH/menuopt/utilities/programs/lps.faa

Financial Aid: Loan Tracking Menu**Loan Tracking Entry**

Program: \$CARSPATH/modules/finaid/progscr/Libloan/main

Menu Access: \$CARSPATH/menuopt/finaid/programs/loans

Parameters Passed:

- -p PP_PROG (program code)
- -L PP_SITE (site code)

Create Loans by ID

Program: \$CARSPATH/src/finaid/facvtln

Menu Access: \$CARSPATH/menuopt/finaid/programs/fac.ymYpsPi

Parameters Passed:

- (new status)

Loan Tracking: COD Menu**Export COD Batch**

Perl script: \$CARSPATH/modules/finaid/commands/ExportCOD.pl

Menu Access: \$CARSPATH/menuopt/finaid/scripts/codexport

Parameters Passed:

- -y (award year)
- -f (XML file prefix)
- -t (export type; valid values are P(ell), D(irect Loan) or B(oth))
- -V (Verbose flag)
- -D (Dry run flag; creates XML file without updating database)
- -z (ID: Export one student by the input ID number)

Import COD Batch

Perl script: \$CARSPATH/modules/finaid/commands/ImportCOD.pl

Menu Access: \$CARSPATH/menuopt/finaid/scripts/codimport

Parameters Passed:

- -f (XML file prefix)
- -V (Verbose flag)
- -D (Dry run flag; creates XML file without updating database)

Release Loan Disbursement

Program: \$CARSPATH/src/finaid/faupdrel

Menu Access: \$CARSPATH/menuopt/finaid/programs/faur.ymYpsS

Parameters Passed:

- -y (award year)
- -m (method)
- -Y (academic year)
- -s (session)
- -p (program)
- -S (site)

Create Loans from Apps

Program: \$CARSPATH/src/finaid/loanappbch

Menu Access: \$CARSPATH/menuopt/finaid/programs/loanappbch

Parameters Passed:

- -y PP_YEAR (financial aid year code)
- -t type (loan type to process)
- -P period (define loan period)
- -l lender (define lender)
- -m method
- -C Y/N (create aid records)
- -T Trial-run Flag: optional, Y/N turns on/off 'Trial-run' flag. Runs the process but doesn't update the database

Import Exit Counseling

Script: \$CARSPATH/modules/finaid/commands/importExitCnsl.pl

Menu Access: \$CARSPATH/menuopt/finaid/scripts/importExitCnsl

Parameters Passed:

- -f (input report filename)
- -t (PP_TICK)
- -r (PP_CTC_RESRC)
- -T Trial-run Flag: optional, Y/N turns on/off 'Trial-run' flag. Runs the process but doesn't update the database

Loan Tracking: COD Reports Menu**Direct Loan Status Report**

ACE Report: \$CARSPATH/modules/finaid/reports/codloan

Menu Access: \$CARSPATH/menuopt/finaid/reports/codloan

Parameters Passed:

- -f (formtype)
- Year
- Loan Origination Agency
- Loan Status
- Linked to Disbursements (Y/N/A): Print if the loan has disbursements. (Y = has; N = does not have; A = all loans)

XML Batch Report

ACE Report: \$CARSPATH/modules/finaid/reports/faxmlbch

Menu Access: \$CARSPATH/menuopt/finaid/reports/faxmlbch

Parameters Passed:

- -f (formtype)
- PP_STATUS (status of batch records)
- batch number
- starting processed date
- ending processed date

COD Student Batch Report

ACE Report: \$CARSPATH/modules/finaid/reports/fastubch

Menu Access:\$CARSPATH/menuopt/finaid/reports/fastubch

Parameters Passed:

- -f (formtype)
- -(ID)
- batch number
- starting processed date
- ending processed date

COD Loan Reconciliation

Program: \$CARSPATH/reports/finaid/loanhist

Menu Access:\$CARSPATH/menuopt/finaid/reports/loanhist

Parameters Passed:

- -i (student ID number)
- Year
- Starting Date
- Ending Date
- -f standard output

Loan Exceptions

Program: \$CARSPATH/src/finaid/loanexcptn

Menu Access:\$CARSPATH/menuopt/finaid/programs/xsa.iftl

Parameters Passed:

- Year
- Session
- Academic Year
- Loan Type

Disbursement Exceptions

SQL script: \$CARSPATH/menuopt/finaid/reports/loanDisbAmt

Menu Access:\$CARSPATH/menuopt/finaid/reports/loanDisbAmt

Format COD Reports

Script: \$CARSPATH/modules/finaid/commands/formatReport.pl

Menu Access:\$CARSPATH/menuopt/finaid/scripts/formatReport

Parameters Passed:

- -f (input report filename)
- -t (standard report)

Compare COD Report Data

Script: \$CARSPATH/modules/finaid/commands/formatReport.pl

Menu Access:\$CARSPATH/menuopt/finaid/reports/cmpcodrpt

Parameters Passed:

- -f (input report filename)
- -t (C: comparison report)
- -r (Y/N: include rejected awards)
- -a (Y/N: compare amounts only)

Pending Disbursement Report

ACE Report: \$CARSPATH/modules/finaid/reports/dlpend

Menu Access:\$CARSPATH/menuopt/finaid/reports/dlpend

Parameters Passed:

- Year
- Begin date
- End date

MPNs by Status Report

ACE Report: \$CARSPATH/modules/finaid/reports/codmpn

Menu Access:\$CARSPATH/menuopt/finaid/reports/codmpn

Parameters Passed:

- Year
- MPN Status or blank
- Y/N (show MPNs with no ID)

Loan Tracking: FFELP**Export Loans**

Program: \$CARSPATH/src/finaid/loanede

Menu Access:\$CARSPATH/menuopt/finaid/programs/loanexport

Parameters Passed:

- -f PP_FA_YR (financial aid year code)
- -p PP_PROG (program code)
- -L PP_SITE (site code)
- -o (original applications)
- -c (change requests)

Import Loans

Program: \$CARSPATH/src/finaid/loanede

Menu Access:\$CARSPATH/menuopt/finaid/programs/loanimport

Parameters Passed:

- -f PP_FA_YR (financial aid year code)
- -o (application responses)
- -D (disbursement rosters)

Note The following parameters are applicable if you choose to import disbursement rosters:

- -j PP_TVCH (journal type code)
- -C PP_DOC (EFT document code)
- -n PP_STATION (EFT station number code)
- -e PP_ENT (EFT entry type code for posting)
- -s PP_SUBS (subsidiary code for posting EFT disbursements)
- -E PP_DATE (effective date of the journal for posting to roster file)

Post Loans to Student Accounts

Csh script: \$CARSPATH/src/finaid/loanpost

Menu Access:\$CARSPATH/menuopt/finaid/programs/loanpost

Parameters Passed:

- -f PP_FA_YR (financial aid code)
- -P (sessions)
- -o PP_OUTPUT (output code)
- -p PP_PROG (program code)
- -j PP_TVCH (journal type code)
- -c PP_DOC (EFT document code)
- -n PP_STATION (EFT station number)
- -e PP_ENT (entry type code to post EFT reimbursements)
- -s (student account subsidiary)
- -b PP_SUB (student subsidiary balance code)
- -S (EFT subsidiary)
- -E PP_DATE (effective date of the journal to be posted)

Re-Import Exceptions

Csh script: \$CARSPATH/src/finaid/loanreimport

Menu Access:\$CARSPATH/menuopt/finaid/programs/loanreimport

Parameters Passed:

- -u (unique ID number)
- -f PP_FA_YR (financial aid code)
- -o (application responses)
- -D (disbursement rosters)
- -j PP_TVCH (journal type code)
- -C PP_DOC (EFT document code)
- -n PP_STATION (EFT station number)
- -e PP_ENT (entry type code to post EFT reimbursements)
- -b PP_SUBS (student subsidiary balance code)
- -E PP_DATE (effective date of the journal to be posted)

Loan Tracking: CRC**Export CRC Batch**

Perl script \$CARSPATH/modules/finaid/commands/ExportCRC.pl

Menu Access:\$CARSPATH/menuopt/finaid/scripts/crcexport

Parameters Passed:

- -y FA_YR_DEF
- -t Export Type: L(oan applications), C(hange requests), or A(II)
- -D Trial-run Flag: optional, Y/N turns on/off 'Trial-run' flag. Generates the XML but doesn't update the database
- -P Sets the process code in the export file P(RODUCTION) or T(EST).
- -l Lender ID: Filters the loans exported by Lender ID, or ALL
- -g Guarantor ID: Filters the loans exported by Guarantor ID, or ALL.
- -R Recipient Type: Defines the recipient of the export: G(uarantor), L(ender), T(hird-party servicer)
- -P Production/Test Mode: P(roduction) or T(est) mode.

Import CRC Batch

Perl script \$CARSPATH/modules/finaid/commands/ImportCRC.pl

Menu Access:\$CARSPATH/menuopt/finaid/scripts/crcimport

Parameters Passed:

- -t Import Type: R(esponses), D(isbursement rosters), or A(II).
- -j journal code to post EFT disbursements
- -C EFT document code
- -n EFT station number
- -e Entry type code to post EFT disbursements
- -s Subsidiary to post EFT disbursements
- -E Effective date of the journal to be posted for the roster file
- -T Trial Run. Y/N to enable/disable Trial Run. Runs the process without updating the database records.

Reimport Skipped CRC

Script: \$CARSPATH/finaid/scripts/crcreimport

Menu Access:\$CARSPATH/menuopt/finaid/scripts/crcreimport

Parameters Passed:

- -t Import Type: R(esponses), D(isbursement rosters), or A(II).
- -j journal code to post EFT disbursements
- -C EFT document code
- -n EFT station number
- -e Entry type code to post EFT disbursements
- -s Subsidiary to post EFT disbursements
- -E Effective date of the journal to be posted for the roster file

- -T Trial Run. Y/N to enable/disable Trial Run. Runs the process without updating the database records.

Release Disbursements

Program: \$CARSPATH/menuopt/finaid/programs/faur.ymYpsSo

Menu Access:\$CARSPATH/menuopt/finaid/programs/ faur.ymYpsSo

Parameters Passed:

- -y (award year)
- -m (method)
- -Y (academic year)
- -p (program)
- -s (session)
- -S (site)
- -T test run

XML Batch Report

Program: \$CARSPATH/menuopt/finaid/reports/crcfaxmlbch

Menu Access:\$CARSPATH/menuopt/finaid/reports/crcfaxmlbch

Parameters Passed:

- status from the XML batch record
- batch number
- starting processed date
- ending processed date

CRC Student Batch Report

Program: \$CARSPATH/menuopt/finaid/reports/crcfastubch

Menu Access:\$CARSPATH/menuopt/finaid/reports/crcfastubch

Parameters Passed:

- PP_ID
- batch number
- starting processed date
- ending processed date

CRC Loan Reconciliation

Program: \$CARSPATH/menuopt/finaid/reports/crcloanhist

Menu Access:\$CARSPATH/menuopt/finaid/reports/crcloanhist

Parameters Passed:

- ID (Student ID)
- FA_YR_DEF Financial Aid year
- starting processed date
- ending processed date

Loan Tracking: Reports Menu**Loan Status Comparison**

Screen: \$CARSPATH/menuopt/finaid/reports/loanCmpr

Menu Access: \$CARSPATH/menuopt/finaid/reports/loanCmpr

Disbursement Roster

SQL script: \$CARSPATH/menuopt/finaid/reports/disbRoster

Menu Access: \$CARSPATH/menuopt/finaid/reports/disbRoster

Disbursement Exceptions

SQL script: \$CARSPATH/menuopt/finaid/reports/loanDisbAmt

Menu Access: \$CARSPATH/menuopt/finaid/reports/loanDisbAmt

Loan History Report

Report: \$CARSPATH/menuopt/finaid/reports/loanhis

Menu Access: \$CARSPATH/menuopt/finaid/reports/loanhis

Parameters Passed:

- ID
- -f format

Print PLUS Promissory Note

Report: \$CARSPATH/menuopt/finaid/reports/dlplusprm

Menu Access: \$CARSPATH/menuopt/finaid/reportsd/lplusprm

Parameters Passed:

- Academic year
- ID #
- Batch number
- -f format

Update PLUS Prom Note Code

Report: \$CARSPATH/menuopt/finaid/informers/dlplusprm

Menu Access: \$CARSPATH/menuopt/finaid/reports/dlplusprm

Parameters Passed:

- Year
- Batch number

Print STAF Promissory Notes

Report: \$CARSPATH/menuopt/finaid/reports/dlstafprm

Menu Access: \$CARSPATH/menuopt/finaid/reports/dlstafprm

Parameters Passed:

- Year
- ID
- Batch number

Update Staf Promissory Notes

Report: \$CARSPATH/menuopt/finaid/informers/dlstafprm

Menu Access: \$CARSPATH/menuopt/finaid/reports/dlstafprm

Parameters Passed:

- Year
- Batch number

Print Stafford Disclosure

Report: \$CARSPATH/menuopt/finaid/reports/dlstafdsc

Menu Access: \$CARSPATH/menuopt/finaid/reports/dlstafdsc

Parameters Passed:

- Financial aid year
- ID

Update Staf Disclosure

Report: \$CARSPATH/menuopt/finaid/informers/dlstafdsc

Menu Access: \$CARSPATH/menuopt/finaid/informers/dlstafdsc

Parameters Passed:

- Year
- Batch number

Print Plus Disclosure

Report: \$CARSPATH/menuopt/finaid/reports/dlplusdsc

Menu Access: \$CARSPATH/menuopt/finaid/reports/dlplusdsc

Parameters Passed:

- ID
- -f format

Update Plus Disclosure

Report: \$CARSPATH/menuopt/finaid/informers/dlplusdsc

Menu Access: \$CARSPATH/menuopt/finaid/informers/dlplusdsc

Parameters Passed:

- Year
- Batch number

Unposted Disbursements

Report: \$CARSPATH/menuopt/finaid/reports/loaneft

Menu Access: \$CARSPATH/menuopt/finaid/reports/loaneft

Parameters Passed:

- Journal begin date
- Journal end date
- Subsidiary
- Journal reference
- Document type

Financial Aid: Data Display Menu**Display Student Data**

Program: \$CARSPATH/src/regist/stuentry

Menu Access: \$CARSPATH/menuopt/finaid/programs/faview

Parameters Passed:

- -f faview (form:
\$CARSPATH/modules/regist/progscr/stuentry/faview_1)
- -d (display-only)
- -L \${CARSPATH} (default site)

Display Registrations

Program: \$CARSPATH/src/regist/regent

Menu Access: \$CARSPATH/menuopt/regist/programs/regent.d

Parameters Passed:

- -p PP_PROG
- -L \${CARSPATH} (default site)
- -F F (registration finish functionality)
- -m HC (disable main menu options: Holds, Confirm)
- -e R (disable enrollment menu option: Reinstate)
- -r C B R L T A (disable registration menu options: Edate, Blkadd, Disrefnd, Loadallw, Subsess, Locallsecs)
- -d (display-only)

Display Transcripts

Program: \$CARSPATH/src/regist/trans

Menu Access: \$CARSPATH/menuopt/regist/programs/trns.d

Parameters Passed:

- -d (display-only)
- -f MORE (display transcript using more pager)
- -L \${CARSPATH} (default site)

Bursar Query

Program: \$CARSPATH/src/accounting/bursar

Menu Access: \$CARSPATH/menuopt/accounting/programs/bsr.D

Parameters Passed:

- -D (display-only)
- -o PP_PRINTER (printer)

Financial Aid: Audit Menu**Audit: No Update**

Program: \$CARSPATH/src/finaid/faaudit

Menu Access: \$CARSPATH/menuopt/finaid/programs/faau..yl

Parameters Passed:

- -l SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -m PP_METHOD (packaging method)
- -M (mail option)
- -U (user list)

Audit: With Update*Program:* \$CARSPATH/src/finaid/faaudit*Menu Access:* \$CARSPATH/menuopt/finaid/programs/faau..ylu*Parameters Passed:*

- -l SUBS_SA_DEF (S/A subsidiary)
- -y PP_YEAR (financial aid award year)
- -m PP_METHOD (packaging method)
- -u (update)
- -M (mail option)
- -U (user list)

Audit: Transaction Audit History*Report:* \$CARSPATH/reports/finaid/stuaudit*Menu Access:* \$CARSPATH/menuopt/finaid/programs/stuaudit*Parameters Passed:*

- Beginning date
- End date

Audit: FA Trans Verification*Report:* \$CARSPATH/reports/finaid/faaudit*Menu Access:* \$CARSPATH/menuopt/finaid/reports/chktrans*Parameters Passed:* None**Reports: Aid Reports Menu****Fund Balances***Report:* \$CARSPATH/modules/finaid/reports/sumcomp*Menu Access:* \$CARSPATH/menuopt/finaid/informers/sumcomp*Parameters Passed:*

- -DYP PP_ACAD_YR (financial aid award year)

Award Offers*Report:* \$CARSPATH/modules/finaid/others/aidrpt*Menu Access:* \$CARSPATH/menuopt/finaid/others/aidrpt*Parameters Passed:*

- Financial aid award year
- First session

- Second session
- Third session

Aid by Code

Report: \$CARSPATH/modules/finaid/others/aidcoderpt

Menu Access:\$CARSPATH/menuopt/finaid/others/aidcoderpt

Parameters Passed:

- Financial aid award year
- Beginning aid code
- Ending aid code
- First session
- Second session
- Third session

Summary Aid by Code

Report: \$CARSPATH/modules/finaid/others/sumcoderpt

Menu Access:\$CARSPATH/menuopt/finaid/others/sumcoderpt

Parameters Passed:

- Financial aid award year
- First session
- Second session
- Third session

Aid by Funding Source

Report: \$CARSPATH/modules/finaid/reports/aidcampus

Menu Access:\$CARSPATH/menuopt/finaid/reports/aidcampus

Parameters Passed:

- Financial aid award year
- Need analysis method
- Need (basis, either dollar or percent)
- Need (smallest value, either dollar amount or percentage)
- Need (largest value, either dollar amount or percentage)

Changes in Registration

Report: \$CARSPATH/modules/regist/reports/regchg

Menu Access:\$CARSPATH/menuopt/regist/reports/regchg

Parameters Passed:

- Session
- Subsession
- Academic year
- Program
- Subprogram

- Student's academic status
- Beginning date
- Ending date

Aid for No-Shows

SQL script: \$CARSPATH/modules/finaid/reports/aidnoshow

Menu Access:\$CARSPATH/menuopt/finaid/reports/aidnoshow

Parameters Passed:

- Session
- Academic year

Aid for Part-time Students

SQL script: \$CARSPATH/modules/finaid/reports/parttime

Menu Access:\$CARSPATH/menuopt/finaid/reports/parttime

Parameters Passed:

- Session
- Academic year
- Upper limit in hours for part-time status

Bridge Enrollment

SQL script: \$CARSPATH/modules/finaid/reports/fabridge

Menu Access:\$CARSPATH/menuopt/finaid/reports/fabridge

Parameters Passed:

- Session
- Academic year
- Program
- Subprogram
- Status

Need Analysis Status

SQL script: \$CARSPATH/modules/finaid/reports/needlist

Menu Access:\$CARSPATH/menuopt/finaid/reports/needlist

Parameters Passed:

- Academic year
- Status

Charges Paid by Aid

SQL script: \$CARSPATH/modules/finaid/reports/aidchg

Menu Access:\$CARSPATH/menuopt/finaid/reports/aidchg

Parameters Passed:

- Balance period
- Amount type

Enrollment Variance

SQL script: \$CARSPATH/modules/finaid/reports/enrvar

Menu Access:\$CARSPATH/menuopt/finaid/reports/enrvar

Parameters Passed:

- Session
- Academic year
- Subsidiary
- Balance period
- Program
- Number of hours for full-time enrollment
- Number of hours for ¾ time enrollment
- Number of hours for half-time enrollment

Add Compliance Statistics

SQL script: \$CARSPATH/modules/finaid/informers/sumcomp

Menu Access:\$CARSPATH/menuopt/finaid/informers/sumcomp

Parameters Passed:

- -DYR PP_ACAD_YR (financial aid award year)

Compliance Audit

Program: \$CARSPATH/src/finaid/faentry

Menu Access:\$CARSPATH/menuopt/finaid/programs/fae.lypso

Parameters Passed:

- -l (subsidiary)
- -y PP_YEAR (financial aid award year)
- -s PP_SESS (session)
- -p PP_PROG (academic program)
- -o PP_OUTPUT (output)
- -v PP_RPT (compliance report type)
- -L \${CARSPATH} (default site)

Compliance Audit by ID

Program: \$CARSPATH/src/finaid/faentry

Menu Access:\$CARSPATH/menuopt/finaid/programs/fae.lypsoz

Parameters Passed:

- Year
- Session
- Program
- Output
- Report type
- IDs (up to 10)

Aid History by Year

Report: \$CARSPATH/modules/finaid/reports/fahist

Menu Access:\$CARSPATH/menuopt/finaid/reports/fahist

Parameters Passed: ID

Aid History by Code

Report: \$CARSPATH/modules/finaid/reports/fahistsum

Menu Access:\$CARSPATH/menuopt/finaid/reports/fahistsum

Parameters Passed: ID

SAP Listing

Report: \$CARSPATH/modules/common/reports/saplist

Menu Access:\$CARSPATH/menuopt/common/reports/saplist

Parameters Passed:

- Session
- Year
- Program
- SAP track
- SAP code
- Beginning date
- Ending date
- Beginning ID#
- Ending ID#

Reports: Aid Transactions Menu**Amounts Paid by Student**

Report: \$CARSPATH/modules/finaid/reports/stufatot

Menu Access:\$CARSPATH/menuopt/finaid/reports/stufatot

Parameters Passed: Balance period

Transactions/Amounts Paid

Report: \$CARSPATH/modules/finaid/reports/stufatottr

Menu Access:\$CARSPATH/menuopt/finaid/reports/stufatottr

Parameters Passed: Balance period

Amounts Paid by Code

Report: \$CARSPATH/modules/finaid/reports/codfatot

Menu Access:\$CARSPATH/menuopt/finaid/reports/codfatot

Parameters Passed:

- Balance period
- Beginning aid code
- Ending aid code

- Post code A
- Post code L
- Post code Y
- Post code N

Transactions/Paid by Code

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

Menu Access: \$CARSPATH/menuopt/finaid/reports/codfatottr

Parameters Passed:

- Balance period
- Beginning aid code
- Ending aid code
- Post code A
- Post code L
- Post code Y
- Post code N

Students Owing Refund

Report: \$CARSPATH/modules/finaid/reports/aidrfnd

Menu Access: \$CARSPATH/menuopt/finaid/reports/aidrfnd

Parameters Passed:

- Subsidiary
- Balance period

G/L Journal Reports

Csh script: \$CARSPATH/modules/accounting/scripts/jrnlgf

Menu Access: \$CARSPATH/menuopt/accounting/scripts/jrnlgf.FA

Parameters Passed:

- -f FT_STANDARD (form)
- FA PP_BEG_VCH_NO (beginning journal number)
- PP_VCH_END (ending journal number)
- N PP_OUTPUT (output)

S/L Journal Reports

Csh script: \$CARSPATH/modules/accounting/scripts/jrnslf

Menu Access: \$CARSPATH/menuopt/accounting/scripts/jrnslf.FA

Parameters Passed:

- -f FT_STANDARD (form)
- FA PP_BEG_VCH_NO (beginning journal number)
- PP_VCH_END (ending journal number)
- N PP_OUTPUT (output)

Reports: FISAP Reports Menu**Default Initial Values**

SQL script: \$CARSPATH/modules/finaid/informers/updfisap

Menu Access: \$CARSPATH/menuopt/finaid/informers/updfisap

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_PROG (program)
- PP_NUM (full-time enrollment minimum)
- PP_SESS1 (first session)
- PP_ACAD_YR (academic year)
- PP_SESS2 (second session)
- PP_ACAD_YR (academic year)
- PP_SESS3 (third session)
- PP_ACAD_YR (academic year)
- *date* (degree granted date)

Create FISAP Records

Program: \$CARSPATH/src/finaid/fisap

Menu Access: \$CARSPATH/menuopt/finaid/programs/fisap.iblmc

Parameters Passed:

- PP_SUBS (subsidiary code)
- PP_ID (ID number)
- PP_ID_BEG (beginning ID number)
- PP_FA_YR (financial aid award year)
- need analysis methodology

Update Total Income

Program: \$CARSPATH/src/finaid/fisap

Menu Access: \$CARSPATH/menuopt/finaid/programs/fisap.iblmc

Parameters Passed:

- PP_ID (ID numbers)
- PP_ID_BEG (beginning ID number)
- PP_FA_YR (financial aid award year)
- need analysis method

No Need/No Income

Csh script: \$CARSPATH/modules/finaid/reports/noneedinc

Menu Access: \$CARSPATH/menuopt/finaid/programs/fisap.iblmc

Parameters Passed:

- PP_ID (ID numbers)
- PP_ID_BEG (beginning ID number)

- PP_FA_YR (financial aid award year)
- need analysis method

Students Not Attending

ACE Report: \$CARSPATH/modules/finaid/reports/noattend

Menu Access:\$CARSPATH/menuopt/finaid/reports/noattend

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_SESS1 (first session)
- PP_ACAD_YR (first year)
- PP_SESS2 (second session)
- PP_ACAD_YR (second year)
- P_SESS3 (third session)
- PP_ACAD_YR (third year)

FISAP Data Audit

Screen: \$CARSPATH/modules/finaid/screen/fisapau

Menu Access:\$CARSPATH/menuopt/finaid/others/fisapau

Parameters Passed:

- PP_YEAR (financial aid award year)
- PP_STUDENTS (students with missing data or all students)

FISAP Data Entry

Screen: \$CARSPATH/modules/finaid/screen/fisap

Menu Access:\$CARSPATH/menuopt/finaid/screens/fisap

Dep. Eligible for Aid

Screen: \$CARSPATH/modules/finaid/others/eligdep

Menu Access:\$CARSPATH/menuopt/finaid/others/eligdep

Parameters Passed:

- PP_YEAR (financial aid award year)

Indep. Eligible for Aid

Screen: \$CARSPATH/modules/finaid/others/eligindep

Menu Access:\$CARSPATH/menuopt/finaid/others/eligindep

Parameters Passed:

- PP_YEAR (financial aid award year)

Eligible for Aid – Detail

Screen: \$CARSPATH/modules/finaid/others/testelig

Menu Access:\$CARSPATH/menuopt/finaid/others/testelig

Parameters Passed:

- PP_YEAR (financial aid award year)

FISAP Report Grid

Screen: \$CARSPATH/modules/finaid/others/fisaptot

Menu Access: \$CARSPATH/menuopt/finaid/others/fisaptot

Parameters Passed:

- PP_YEAR (financial aid award year)

FISAP Report – Detail

Screen: \$CARSPATH/modules/finaid/others/testtot

Menu Access: \$CARSPATH/menuopt/finaid/others/testtot

Parameters Passed:

- PP_YEAR (financial aid award year)

Missing Data Audit

Screen: \$CARSPATH/modules/finaid/others/totaudit

Menu Access: \$CARSPATH/menuopt/finaid/others/totaudit

Parameters Passed:

- PP_YEAR (financial aid award year)

Import Workstudy File

Perl script: \$CARSPATH/modules/finaid/commands/fisapwork.pl

Menu Access: \$CARSPATH/menuopt/finaid/scripts/fisapwork

Parameters Passed:

- -y PP_YEAR (financial aid award year)
- -p PP_PROG (program)
- -d PP_FA_CODE (financial aid code)
- -f PP_FILE (filename of SSNs to process)
- -T Trial Run (Y/N: run the process without updating the database records)

Reports: Gainful Employment Menu**Create GE Records**

Perl script: \$CARSPATH/modules/finaid/commands/CreateGE.pl

Menu Access: \$CARSPATH/menuopt/finaid/scripts/createge

Parameters Passed:

- -y PP_YEAR (award year)
- -V Y/N (Verbose flag)
- -T Y/N (Trial-run flag; tests creating records without updating database)

GE Data Entry

Screen: \$CARSPATH/regist/screen/stuge

Menu Access: \$CARSPATH/menuopt/regist/screens/stuge

Export GE Records

Perl script: \$CARSPATH/modules/finaid/commands/ExportGE.pl

Menu Access: \$CARSPATH/menuopt/finaid/scripts/exportge

Parameters Passed:

- -y PP_YEAR (award year)
- -V Y/N (Verbose flag)
- -T Y/N (Trial-run flag; creates export file without updating database)
- -z (ID: Export one student by the input ID number)
- -n Y/N (Include non-GE students in the export)

GE Report

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

Menu Access: \$CARSPATH/menuopt/finaid/reports/gainfulemp

Parameters Passed:

- PP_YEAR (award year)

Financial Aid: Decision Processing Menu

Test Decision

Program: \$CARSPATH/src/finaid/fadec

Menu Access: \$CARSPATH/menuopt/finaid/programs/fad.ymYPsSd

Parameters Passed:

- PP_ID (test ID with known data you can use to verify your table setup)
- PP_YEAR (academic year (e.g., 101))
- PP_SESS (academic session (e.g., FA))
- PP_YEAR (calendar year)
- PP_METHOD (methodology to test)
- PP_PROG (academic program to test (e.g., UNDG))
- Aid Code
- Decision Type (type of decision being tested, selected from the following):
 - BGTGRP
 - FAITEM
 - FABGTDUR
 - MAXPKGAM
 - PKGGRP
 - BGTCODE
 - FALOAN
 - FEEPCTS
 - GRANT

Budget Process

Program: \$CARSPATH/src/finaid/fabgt

Menu Access: \$CARSPATH/menuopt/finaid/programs/fabgt.iymYpsSrov

Parameters Passed:

- PP_ID (test ID with known data you can use to verify your table setup)
- PP_YEAR (academic year (e.g., 1213))
- PP_SESS (academic session (e.g., FA))
- PP_YEAR (calendar year)
- PP_METHOD (methodology to test)
- PP_PROG (academic program to test (e.g., UNDG))
- Delete/Replace (replace old fabgt_rec with new fabgt_rec)
- PP_CTC_RESRC (contact resource)
- Complete Contact
- -T Trial Run (Y/N: run the process without updating the database records)

Financial Aid: Table Maintenance: Package Group

Program: \$CARSPATH/src/finaid/fadecgrp

Menu Access: \$CARSPATH/menuopt/finaid/programs/fadgrp.iymYPsSro

Parameters Passed:

- PP_ID (test ID with known data you can use to verify your table setup)
- PP_YEAR (academic year (e.g., 1213))
- PP_SESS (academic session (e.g., FA))
- PP_YEAR (calendar year)
- PP_METHOD (methodology to test)
- PP_PROG (academic program to test (e.g., UNDG))
- Overwrite (overwrite stufa_rec.pkg_grp)
- PP_CTC_RESRC (contact resource)
- Complete Contact
- -T Trial Run (Y/N: run the process without updating the database records)

Financial Aid: Table Maintenance: Aid Tables Menu

Aid Types/Forms

Screen: \$CARSPATH/modules/finaid/screens/taidtype

Menu Access: \$CARSPATH/menuopt/finaid/screens/taidtype

Funding Codes

Screen: \$CARSPATH/modules/finaid/screens/tfndg

Menu Access: \$CARSPATH/menuopt/finaid/screens/tfndg

Aid Codes

Screen: \$CARSPATH/modules/finaid/screens/taid

Menu Access: \$CARSPATH/menuopt/finaid/screens/taid

After Adding Aid Codes

SQL script: \$CARSPATH/modules/finaid/informers/addaidsubs

Menu Access:\$CARSPATH/menuopt/finaid/informers/addaidsubs

Fund Balances

Screen: \$CARSPATH/modules/finaid/screens/taidpkg

Menu Access:\$CARSPATH/menuopt/finaid/screens/taidpkg

Grant Types/Aid Assoc.

Screen: \$CARSPATH/modules/finaid/screens/tgranttype

Menu Access:\$CARSPATH/menuopt/finaid/screens/tgranttype

Award Year Properties

Screen: \$CARSPATH/modules/finaid/screens/tfayr

Menu Access:\$CARSPATH/menuopt/finaid/screens/tfayr

Partial Aid Detail

Screen: \$CARSPATH/modules/finaid/screens/tprtlaid

Menu Access:\$CARSPATH/menuopt/finaid/screens/tprtlaid

Partial Aid Detail Report

Screen: \$CARSPATH/modules/finaid/reports/tprtlaid

Menu Access:\$CARSPATH/menuopt/finaid/reports/tprtlaid

Copy Partial Aid Detail

Screen: \$CARSPATH/modules/finaid/informers/cptptrlaid

Menu Access:\$CARSPATH/menuopt/finaid/informers/cptptrlaid

Financial Aid: Table Maintenance: Need Analysis Menu**Need Analysis Methods**

Screen: \$CARSPATH/modules/finaid/screens/tfameth

Menu Access:\$CARSPATH/menuopt/finaid/screens/tfameth

Copy Need Anal. Meth./IM Options

SQL script: \$CARSPATH/modules/finaid/informers/addtfameth

Menu Access:\$CARSPATH/menuopt/finaid/informers/addtfameth

IM Method Options

Screen: \$CARSPATH/modules/finaid/screens/timmeth

Menu Access:\$CARSPATH/menuopt/finaid/screens/timmeth

Asset Protect Allow

Screen: \$CARSPATH/modules/finaid/screens/tapa

Menu Access:\$CARSPATH/menuopt/finaid/screens/tapa

Bus/Farm Net Worth

Screen: \$CARSPATH/modules/finaid/screens/tbusfarm

Menu Access: \$CARSPATH/menuopt/finaid/screens/tbusfarm

Estimated U.S. Tax

Screen: \$CARSPATH/modules/finaid/screens/tfatax

Menu Access: \$CARSPATH/menuopt/finaid/screens/tfatax

Income Protect Allow

Screen: \$CARSPATH/modules/finaid/screens/tipa

Menu Access: \$CARSPATH/menuopt/finaid/screens/tipa

Income Contribution

Screen: \$CARSPATH/modules/finaid/screens/tincont

Menu Access: \$CARSPATH/menuopt/finaid/screens/tincont

State Tax Allowance

Screen: \$CARSPATH/modules/finaid/screens/ttaxallow

Menu Access: \$CARSPATH/menuopt/finaid/screens/ttaxallow

Financial Aid: Table Maintenance: Packaging Tables Menu**Packaging Codes**

Screen: \$CARSPATH/modules/finaid/screens/tpkg

Menu Access: \$CARSPATH/menuopt/finaid/screens/tpkg

Copy Packaging Tables

SQL script: \$CARSPATH/modules/finaid/informers/addtpkg

Menu Access: \$CARSPATH/menuopt/finaid/informers/addtpkg

Parameters Passed:

- PP_YEAR (financial aid year to copy from)
- PP_YEAR (financial aid year to copy in)
- PP_METHOD (packaging method to copy from)
- PP_METHOD (packaging method to copy in)

Minn. State Grant Table

Screen: \$CARSPATH/modules/finaid/screens/tmngmnt

Menu Access: \$CARSPATH/menuopt/finaid/screens/tmngmnt

Financial Aid: Table Maintenance: Budget Tables Menu**Budget Expense Items**

Screen: \$CARSPATH/modules/finaid/screens/tfaitem

Menu Access: \$CARSPATH/menuopt/finaid/screens/tfaitem

Budget Types

Screen: \$CARSPATH/modules/finaid/screens/tfabgt

Menu Access: \$CARSPATH/menuopt/finaid/screens/tfabgt

Parameters Passed:

- PP_YEAR (financial aid year to report)

Budget Groups

Screen: \$CARSPATH/modules/finaid/screens/tbgtgrp

Menu Access:\$CARSPATH/menuopt/finaid/screens/tbgtgrp

Copy Budget Associations

SQL script: \$CARSPATH/modules/finaid/informers/adtfabgtas

Menu Access:\$CARSPATH/menuopt/finaid/informers/adtfabgtas

Parameters Passed:

- PP_YEAR (financial aid year to copy from)
- PP_SESS (session to copy from)
- PP_YEAR (financial aid year to copy to)
- PP_SESS (session to copy to)

Expense/Subs Total Assoc.

Screen: \$CARSPATH/modules/finaid/screens/tfaexpas

Menu Access:\$CARSPATH/menuopt/finaid/screens/tfaexpas

Financial Aid: Table Maintenance: Compliance Tables Menu**Compliance Codes**

Screen: \$CARSPATH/modules/finaid/screens/tcomply

Menu Access:\$CARSPATH/menuopt/finaid/screens/tcomply

Copy Compliance Tables

SQL script: \$CARSPATH/modules/finaid/informers/addtcply

Menu Access:\$CARSPATH/menuopt/finaid/informers/addtcply

Parameters Passed:

- PP_YEAR (financial aid year to copy from)
- PP_YEAR (financial aid year to copy in)
- PP_TICK (contact tickler code)

Financial Aid: Table Maintenance: Contact/Tickler Tables Menu**Tickler**

Screen: \$CARSPATH/modules/finaid/screens/ttick

Menu Access:\$CARSPATH/menuopt/finaid/screens/ttick

Contact

Screen: \$CARSPATH/modules/finaid/screens/tctc

Menu Access:\$CARSPATH/menuopt/finaid/screens/tctc

Copy Tick/Contact Tables

SQL script: \$CARSPATH/modules/finaid/informers/addtctc

Menu Access:\$CARSPATH/menuopt/finaid/informers/addtctc

Parameters Passed:

- PP_YEAR (financial aid year to copy from)

- PP_YEAR (financial aid year to copy in)
- PP_TICK (contact tickler code)

ISIR Edits to Contacts

Screen: \$CARSPATH/modules/finaid/screens/tctcfaedit

Menu Access: \$CARSPATH/menuopt/finaid/screens/tctcfaedit

After Adding Edits/Contact

SQL Script: \$CARSPATH/modules/finaid/scripts/audctcfaedit

Menu Access: \$CARSPATH/menuopt/finaid/scripts/audctcfaedit

Parameters Passed:

- PP_YEAR (financial aid award year)

Financial Aid: Table Maintenance: Decision Processor Tables Menu**Decision Codes**

Screen: \$CARSPATH/modules/finaid/screens/tfadec

Menu Access: \$CARSPATH/menuopt/finaid/screens/tfadec

Copy Decision Tables

SQL script: \$CARSPATH/modules/finaid/informers/addtfadec

Menu Access: \$CARSPATH/menuopt/finaid/screens/addtfadec

Parameters Passed:

- PP_YEAR (financial aid year to copy)
- PP_YEAR (financial aid year to create)
- PP_TICK (contact tickler code)

Test Decision

Programs: \$CARSPATH/modules/finaid/src/fadec

Menu Access: \$CARSPATH/menuopt/finaid/programs/fad.iymYPsSd

Parameters Passed:

- PP_ID (test ID with known data you can use to verify your table setup)
- PP_YEAR (academic year (e.g., 1213))
- PP_SESS (academic session (e.g., FA))
- PP_YEAR (calendar year)
- PP_METHOD (methodology to test)
- PP_PROG (academic program to test (e.g., UND))
- Decision Type (type of decision being tested, selected from the following):
 - BGTGRP
 - BGTCODE
 - FAITEM
 - FABGTDUR
 - MAXPKGAM

- PKGGRP

Financial Aid: Table Maintenance: Enrollment Status Tables Menu**Aid Detail**

Screen: \$CARSPATH/modules/finaid/screens/taiddtl

Menu Access:\$CARSPATH/menuopt/finaid/screens/taiddtl

Enrollment Schedule

Screen: \$CARSPATH/modules/finaid/screens/tschdsess

Menu Access:\$CARSPATH/menuopt/finaid/screens/tschdsess

Session

Screen: \$CARSPATH/modules/finaid/screens/tfasess

Menu Access:\$CARSPATH/menuopt/finaid/screens/tfasess

Financial Aid: Table Maintenance: Verification Table Menu**FA Verification**

Screen: \$CARSPATH/modules/finaid/screens/tfaver

Menu Access:\$CARSPATH/menuopt/finaid/screens/tfaver

Financial Aid: Table Maintenance: SAP Tables Menu**SAP Codes**

Screen: \$CARSPATH/modules/finaid/screens/tfasap

Menu Access:\$CARSPATH/menuopt/finaid/screens/tfasap

SAP Criteria

Screen: \$CARSPATH/modules/finaid/screens/tsapcrit

Menu Access:\$CARSPATH/menuopt/finaid/screens/tsapcrit

Financial Aid: Table Maintenance: Financial Aid Web Tables Menu**Estimator Code**

Screen: \$CARSPATH/modules/finaid/screens/twebpkg

Menu Access:\$CARSPATH/menuopt/finaid/screens/twebpkg

Copy Estimator Tables

Screen: \$CARSPATH/modules/finaid/informers/addtpkgest

Menu Access:\$CARSPATH/menuopt/finaid/informers/addtpkg

Parameters Passed:

- PP_YEAR (financial aid year to copy packaging tables from)
- PP_YEAR (financial aid year to copy packaging tables to)
- PP_METHOD (packaging method code to copy)

Web Estimator

Screen: \$CARSPATH/modules/finaid/screens/tfawebest

Menu Access:\$CARSPATH/menuopt/finaid/screens/tfawebest

Copy Estimator Table

Screen: \$CARSPATH/modules/finaid/informers/addtfawebest

Menu Access: \$CARSPATH/menuopt/finaid/informers/addtfawebest

Parameters Passed:

- PP_YEAR (financial aid year to copy estimator tables from)
- PP_YEAR (financial aid year to copy estimator tables to)

Message

Screen: \$CARSPATH/modules/common/screens/tapsmsg

Menu Access: \$CARSPATH/menuopt/common/screens/tapsmsg

Financial Aid: Table Maintenance: COD Tables Menu**Country Code/Assoc.**

Screen: \$CARSPATH/modules/finaid/screens/tctryas

Menu Access: \$CARSPATH/menuopt/finaid/screens/tctryas

Pell Table Maintenance

Screen: \$CARSPATH/modules/finaid/screens/tedepell

Menu Access: \$CARSPATH/menuopt/finaid/screens/tedepell

XML Conversion

Screen: \$CARSPATH/modules/finaid/screens/txmlcv

Menu Access: \$CARSPATH/menuopt/finaid/screens/txmlcv

XML Conversion Report

Screen: \$CARSPATH/modules/finaid/commands/txmlcv.pl

Menu Access: \$CARSPATH/menuopt/finaid/commands/txmlcv.pl

Financial Aid PERFORM (Table Maintenance) Screens

Financial Aid uses PERFORM screens for displaying some maintenance tables and records. You can access the screen files in the following directory path: \$CARSPATH/modules/finaid/screens.

The following lists the PERFORM screens used in Financial Aid.

Note In the following list, descriptions of PERFORM screens include:

- Purpose of the screen
- Directory location of the screen file
- Menu access location
- Tables used in the screen

1998/99 EDE/Pell screen (edepell98)

Enables you to make manual entries to EDE/Pell records

Screen: \$CARSPATH/modules/finaid/screens/edepell98

Menu Access: Financial Aid: Pell Payment Editing Menu: 1998 – 99 Pell
Pmt Records

Tables/Records Used:

- edepell_rec
- id_rec
- st_table

1997/98 EDE/Pell screen (edepell97)

Enables you to make manual entries to EDE/Pell records

Screen: \$CARSPATH/modules/finaid/screens/edepell97

Menu Access: Financial Aid: Pell Payment Editing Menu: 1997 – 98 Pell
Pmt Records

Tables/Records Used:

- edepell_rec
- id_rec
- st_table

Aid Table (taid)

Enables you to maintain aid codes

Screen: \$CARSPATH/modules/finaid/screens/taid

Menu Access: Financial Aid: Table Maintenance: Aid Tables Menu: Aid
Codes

Tables/Records Used:

- aid_form_table
- aid_type_table

Aid Detail Table (taiddtl)

Enables you to maintain enrollment status detail information for an aid code

Screen: \$CARSPATH/modules/finaid/screens/taiddtl

Menu Access: Table Maintenance: Enrollment Status Tables Menu: Aid
Detail

Tables/Records Used:

- aiddtl_table
- aid_table
- faschd_table

Aid/Grant Association Table (taidgrant)

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. This table is accessed 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.

Screen: \$CARSPATH/modules/finaid/screens/tgranttype
\$CARSPATH/menueopt/finaid/screens/taidgrantas

Aid Types/Form Table (taidtype)

Enables you to maintain types and forms of aids

Screen: \$CARSPATH/modules/finaid/screens/taidtype

Menu Access: Financial Aid: Table Maintenance: Aid Tables Menu: Aid Types/Forms

Tables/Records Used:

- aid_form_table
- aid_table
- fndg_table
- subt_table

Asset Protect Allowance Table (tapa)

Enables you to maintain asset allowance information

Screen: \$CARSPATH/modules/finaid/screens/tapa

Menu Access: Financial Aid Need Analysis Table Maintenance Menu: Asset Protect Allow

Tables/Records Used:

- apa_table

Automated Financial Aid Packaging Parameters (ppkg)

Enables you to set parameters for Financial Aid Packaging batch processing

Screen: \$CARSPATH/modules/finaid/screens/ppkg

Menu Access: Student Processing: Automated Packaging Menu: Packaging Parameters

Tables/Records Used:

- pkg_table
- ppkg_rec

Budget Expense Item Code/Subsidiary Total Code Association Table (tfaexpas)

Enables you to maintain budget expense information

Screen: \$CARSPATH/modules/finaid/screens/tfaexpas

Menu Access: Table Maintenance: Budget Tables Menu: Expense/Subs.Total Assoc.

Tables/Records Used:

- fa_item_table
- faexpas_table
- subt_table

Business And Farm Net Worth Adjustment Table (tbusfarm)

Enables you to maintain net worth information.

Screen: \$CARSPATH/modules/finaid/screens/tbusfarm

Menu Access: Financial Aid: Need Analysis Table Maintenance: Bus/Farm Net Worth

Tables/Records Used:

- busfarm_table

Contact Table (tctc)

Enables you to maintain financial aid contacts

Screen: \$CARSPATH/modules/finaid/screens/tctc

Menu Access: Table Maintenance: Contact/Tickler Menu: Contact

Tables/Records Used:

- ctc_table

Contact-Edit Table (tctcfaedit)

Maps Financial Aid Edit codes to Contact codes

Screen: \$CARSPATH/modules/finaid/screens/tctcfaedit

Menu Access: Table Maintenance: Contact/Tickler Menu: ISIR Edits to Contacts

Tables/Records Used:

- ctc_table
- faedit_table

Enrollment Schedule (tschdsess)

Enables you to maintain enrollment schedule information

Screen: \$CARSPATH/modules/finaid/screens/tschdsess

Menu Access: Table Maintenance: Enrollment Status Tables Menu: Enrollment Schedule

Tables/Records Used:

- prog_table
- faschd_table
- schdsess_table

Estimated U.S. Tax Table (tfatax)

Enables you to maintain U.S. tax estimate information

Screen: \$CARSPATH/menuopt/finaid/screens/tfatax

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: Estimated U.S. Tax

Tables/Records Used:

- fatax_table

Financial Aid Budget Item Table (tfaitem)

Enables you to maintain budget item information

Screen: \$CARSPATH/modules/finaid/screens/tfaitem

Menu Access: Table Maintenance: Budget Tables Menu: Expense Budget Items

Tables/Records Used:

- fa_item_table

Financial Aid Budget Group Table (tbgtgrp)

Allows you to maintain budget group information

Screen: \$CARSPATH/modules/finaid/screens/tbgtgrp

Menu Access: Table Maintenance: Budget Tables Menu: Budget Groups

Financial Aid Budget Types (tfabgt)

Enables you to maintain budget type information

Screen: \$CARSPATH/modules/finaid/screens/tfabgt

Menu Access: Table Maintenance: Budget Tables Menu: Budget Types

Tables/Records Used:

- fa_item_table
- fabgt_table
- fabgtas_table

Financial Aid Compliance Tables (tcply)

Enables you to maintain compliance information

Screen: \$CARSPATH/modules/finaid/screens/tcply

Menu Access: Table Maintenance: Compliance Tables Menu: Compliance Codes

Tables/Records Used:

- id_rec
- aid_table
- cply_crit_table
- cply_req_table
- cply_seq_table
- cplyas_table

Financial Aid Decision Tables (tfndg)

Enables you to maintain decision type information for the automatic assignment of results based on user-defined criteria

Screen: \$CARSPATH/modules/finaid/screens/tfadec

Menu Access: Financial Aid: Table Maintenance Menu: Decision Processor
Tables: Decision

Tables/Records Used:

- id_rec
- aid_table
- fadec_table
- fadecres_table
- fadecrit_table

Financial Aid Funding Source Table (tfndg)

Enables you to maintain financial aid funding source information

Screen: \$CARSPATH/modules/finaid/screens/tfndg

Menu Access: Financial Aid: Table Maintenance: Aid Tables Menu: Funding Codes

Tables/Records Used:

- fndg_table

Financial Aid Session Table (tfasess)

Enables you to maintain session information for enrollment status

Screen: \$CARSPATH/menuept/finaid/screens/tfasess

Menu Access: Table Maintenance: Enrollment Status Tables Menu: Session

Tables/Records Used:

- fasess_table

Financial Aid Status (statusctc)

Screen: \$CARSPATH/modules/finaid/screens/statusctc

Tables/Records Used:

- ctc_rec
- ctry_table
- id_rec
- st_table
- title_table

Financial Aid Verification Table (tfaver)

Enables you to maintain verification information

Screen: \$CARSPATH/modules/finaid/screens/tfaver

Menu Access: Table Maintenance: Verification Table Menu: FA Verification

Tables/Records Used:

- faver_table

FISAP Screen (fisap)

Enables you to view ID, profile, program, financial aid, and FISAP records.

Screen: \$CARSPATH/modules/finaid/screens/fisap

Menu Access: Reports: FISAP Reports Menu: FISAP Data Entry

Tables/Records Used:

- fisap_rec
- id_rec
- prog_enr_rec
- st_table
- stufa_rec
- title_table

Fund Balance Table (taidpkg)

Enables you to maintain fund balance information

Note This table (also known as Aid Packaging table) is automatically set up by year, program, and aid code when the aid code is added for the first time for that year and program. You need to set up the allocated amounts in the table for that aid code.

Screen: \$CARSPATH/modules/finaid/screens/taid

Menu Access: Financial Aid: Table Maintenance: Aid Tables Menu: Fund Balances

Tables/Records Used:

- aid_table
- aid_type_table

- aidpkg_table

Grant Type Table

Enables you to associate aid codes with grant types (such as Pell). This allows more than one Aid Code to be defined for each Grant Type, and any number of Grants are possible. This table appears on the same screen as the Aid/Grant Association Table (aidgrantas_table).

Screen: \$CARSPATH/modules/finaid/screens/tgranttype

Menu Access: Financial Aid: Table Maintenance: Aid Tables Menu: Grant Types/Aid Assoc.

Tables/Records Used:

- granttype_table

IM User Defined Options Table (timmeth)

Enables you to maintain user-defined need analysis methodologies.

Screen: \$CARSPATH/modules/finaid/screens/timmeth

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: IM Method Options

Tables/Records Used:

- immeth_table

Income Contribution Table (tincont)

Enables you to maintain income distribution information.

Screen: \$CARSPATH/modules/finaid/screens/tincont

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: Income Contribution

Tables/Records Used:

- incont_table

Income Protection Allowance Table (tipa)

Enables you to maintain income protection allowance information.

Screen: \$CARSPATH/modules/finaid/screens/tipa

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: Income Protect Allow

Tables/Records Used:

- ipa_table

Minnesota State Grant Calculation Table (tmngrnt)

Enables you to maintain Minnesota State Grant information.

Screen: \$CARSPATH/modules/finaid/screens/tmgrnt

Menu Access: Table Maintenance: Packaging Tables Menu: Minn. State Grant Table

Tables/Records Used:

- mgrnt_table

Need Analysis Method Table (tfameth)

Enables you to maintain need analysis methods.

Screen: \$CARSPATH/modules/finaid/screens/tfameth

Menu Access: Financial Aid: Need Analysis Table Maintenance: Need Analysis Methods

Tables/Records Used:

- fameth_table

Packaging Codes (tpkg)

Enables you to maintain packaging codes, objectives, and criteria information.

Screen: \$CARSPATH/modules/finaid/screens/tpkg

Menu Access: Table Maintenance: Packaging Tables Menu: Packaging Codes

Tables/Records Used:

- aid_table
- aid_type_table
- aidpkg_table
- fameth_table
- pkg_table
- pkgobj_table

Partial Aid Table (tprtlaid)

Defines initial Partial Financial Aid Award values to insert when creating an award.

Screen: \$CARSPATH/modules/finaid/screens/tprtlaid

Menu Access: Table Maintenance: Aid Tables Menu: Partial Aid Detail

Tables/Records Used:

- prtl_aid_table

SAP Track Table (tsaptrk)

Enables you to maintain SAP criteria information for each track.

Screen: \$CARSPATH/modules/finaid/screens/tsaptrk

Menu Access: Table Maintenance: SAP Table Menu: SAP Codes

Tables/Records Used:

- saptrk_table

Criteria Table (tcrit)

Enables you to maintain SAP criteria information for each track.

Screen: \$CARSPATH/modules/finaid/screens/tcrit

Menu Access: Table Maintenance: SAP Table Menu: SAP Criteria

Tables/Records Used:

- crit_table

SAP Criteria Table (tsapcrit)

Enables you to maintain SAP criteria information.

Screen: \$CARSPATH/modules/finaid/screens/tsapcrit

Menu Access: Table Maintenance: SAP Table Menu: SAP Criteria

Tables/Records Used:

- sapcrit_table

Satisfactory Academic Progress Table (tfasap)

Enables you to maintain satisfactory academic progress codes.

Screen: \$CARSPATH/modules/finaid/screens/tfasap

Menu Access: SAP Table Menu: SAP Codes

Tables/Records Used:

- fasap_table

Satisfactory Academic Progress Actions Table (tfasapact)

Enables you to maintain each satisfactory academic progress status action.

Screen: \$CARSPATH/modules/finaid/screens/tfasapact

Menu Access: SAP Table Menu: SAP Codes

Tables/Records Used:

- fasapact_table

State Tax Allowance Table (ttaxallow)

Enables you to maintain state tax allowance information.

Screen: \$CARSPATH/modules/finaid/screens/ttaxallow

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu: State Tax Allowance

Tables/Records Used:

- st_table
- taxallow_table

Tickler Table (ttick)

Enables you to maintain tickler codes for financial aid.

Screen: \$CARSPATH/modules/finaid/screens/ttick

Menu Access: Table Maintenance: Contact/Tickler Menu: Tickler

Tables/Records Used:

- tick_table

Update Blank/Invalid Social Security No. In Need Analysis Tape Record (natp)

Enables you to update Social Security number information.

Screen: \$CARSPATH/modules/finaid/screens/natp

Menu Access: Financial Aid: Need Analysis Tape Conversion Menu: Update Tape/ISIR SS Num

Tables/Records Used:

- id_rec
- natp_rec, natp0809_rec, ...natp1213_rec
- prog_table

Financial Aid SQL Scripts

The Financial Aid product contains SQL scripts that perform queries and produce reports from database records. The scripts are located in the following directory path: \$CARSPATH/modules/finaid/informers.

Note Csh scripts can call SQL scripts and ACE reports. These SQL scripts and ACE reports do not reside on the CX menu system.

The following lists the SQL scripts provided with Financial Aid.

addaidsubs

Creates financial aid table entries to subt_table, subas_table, and defer_table from the aid_table.

Note You can run this script multiple times

Tables/Records Used:

- aid_table
- defer_table
- subas_table
- subt_table

Menu Access: Financial Aid: Table Maintenance: Aid Tables Menu: After Adding Aid Codes

addproj

Adds financial aid need records for a particular need method and financial aid year. The script adds or updates the expense budget, the total family contribution, and the need.

Tables/Records Used:

- faneed_rec
- stufa_rec

Menu Access: Student Processing: Automated Packaging Menu: Add Need Records/Fixed Adj

addtcply

Adds compliance tables for a new financial aid year based on the previous years financial aid compliance tables. This script adds compliance association, compliance criteria, compliance requirements, and compliance sequence tables.

Tables/Records Used:

- cply_crit_table
- cply_req_table
- cply_seq_table
- cplyas_table

Menu Access: Table Maintenance: Compliance Tables Menu: Copy Compliance Tables

addtctc

Copies the tickler record and contact records from a previous tickler to a new tickler. This is run prior to beginning any processing for a new academic year.

Tables/Records Used:

- tick_table
- ctc_table

Menu Access: Table Maintenance: Contact/Tickler Menu: Copy Tick/Contact Tables

addtfameth

Adds fameth_table entries for a new year.

Tables/Records Used:

- fameth_table

Menu Access: Financial Aid: Need Analysis Table Maintenance Menu:
Create Need Anal. Meth.

addtpkg

Adds new package tables for a new financial aid year based on the previous year's package tables. This script adds the package table, package objective table, and the aid package table.

Tables/Records Used:

- aidpkg_table
- pkg_table
- pkgobj_table

Menu Access: Table Maintenance: Packaging Tables Menu: Copy Packaging Tables

adtfabgtas

Copies fabgtas_table records from a previous financial aid year and period specified to a new financial aid year and period.

Tables/Records Used:

- fabgtas_table

Menu Access: Table Maintenance: Budget Tables Menu: Copy Budget Associations

allowpkg

Sets the stufa_allow_pkg flag to Y before a packaging run.

Tables/Records Used:

- stufa_rec

Menu Access: Student Processing: Automated Packaging Menu: Update Package Allow Flag

cmplpell

Changes the *verification completed* Contact record status to C(omplete) when all the required documents for verification have been received. Completes the institutional verification form contact when all the required documents for verification have been received. This script must be customized at each school for the list of verification contacts. This script also updates the stufa_ver_cmpl_date automatically when verification is complete.

Tables/Records Used:

- ctc_rec
- stufa_rec

cptedepell

Copies the edepell_table and pelldisb_table records from one financial aid year to another (similarly to adtfabgtas).

Tables/Records Used:

- edepell_table
- pelldisb_table

Menu Access: Financial Aid: Table Maintenance: COD Tables: Copy Pell Tables

cptprtlaid

Copies the prtl_aid_table records from one financial aid year to another (similarly to adtfabgtas).

Tables/Records Used:

- prtl_aid_table

Menu Access: Financial Aid: Table Maintenance: COD Tables: Copy Partial Aid Detail

delsim

Deletes aid simulation records when no longer needed.

Tables/Records Used:

- aid_rec
- aidpkg_table
- stufa_rec

Menu Access: Student Processing: Automated Packaging Menu: Delete Simulation Records

dopkg

Completes the *ready-to-be-packaged* Contact record by updating the status of the PACKAGE contact from *expected* to *completed* when a set of contacts in the document tracking system are also completed. This script must be customized at each site so the required document list is valid.

Tables/Records Used:

- ctc_rec

edfatflag

Indicates the Financial Aid office's receipt of a Financial Aid transcript for a specific institution by updating the flag in the Education record.

Tables/Records Used:

- ctc_rec
- ed_rec

fatctc

Uses Contact records to add student Financial Aid transcript requests to the document tracking system.

Note The script uses the correspondent ID to link the name of the institution with the Contact record.

Tables/Records Used:

- ctc_rec
- ed_rec
- stufa_rec
- sch_rec

loanctc

Adds expected loan Contact records when corresponding loan application received Contact records are completed in the document tracking system.

*Tables/Records Used:*ctc_rec**sarctc**

Indicates the receipt of the Pell Student Aid Report (SAR) contacts by adding Contact records to the document tracking system. The script adds the Contact record for receipt of the Pell when the Pell Student Aid Index (SAI) is equal to or less than 2000.

- ctc_rec
- faneed_rec

selsapids

Selects students that are to have the financial aid satisfactory academic progress (SAP) process run on them.

Note You can modify this script to select on any criteria. The base product looks at the sap field in the aid_table. If the value is “Y” and the student has been awarded this aid for the previous session and year, the student is selected for SAP. A contact “SELCTSAP” with an expected status is added to the student with the passed tickler.

You can set up any contact you want. You may also change the informer so various groups are identified and each group has a different selection contact added. In this case, the parameter for a contact can be removed from the selection menu option because the contact is incorporated into the informer.

Tables/Records Used:

- adm_rec
- aid_rec

- ctc_rec
- ctc_table
- stufa_rec

Menu Access: Financial Aid: SAP Processing Menu: Select SAP IDs

statctc

Selects and adds FASTAT contacts for the status letter based on expected contacts printed on the status letter. The logic for selection is the same as the ltrfastat ace report.

Tables/Records Used:

- ctc_rec
- ctc_table

Menu Access: Document Tracking: Letters Menu: Select Status Letters – All

sumcomp

Combines all the necessary statistics across site to perform compliance checking.

Tables/Records Used:

- acad_sum_rec
- statsum_rec
- stu_acad_rec
- stu_stat_rec
- stufa_rec

Menu Access: Reports: Aid Reports Menu: Add Compliance Statistics

typectc

Deletes non-applicable contacts by deleting Contact records (with a status of *expected*) for students meeting institutional-defined parameters.

Note You must customize this script for contact names, categories (if used) and programs before used.

Tables/Records Used:

- ctc_rec
- profile_rec
- stufa_rec

updfisap

Defaults required fisap information fields.

Tables/Records Used:

- deg_table
- ed_rec
- prog_enr_rec
- site_rec
- stu_acad_rec
- stufa_rec

Menu Access: Reports: FISAP Reports Menu: Update Initial Values

updpkgamt

Moves actual awarded and disbursed amounts into the packaging simulation table before running packaging so that students are not overawarded.

Tables/Records Used:

- aidpkg_table

Menu Access: Student Processing: Automated Packaging Menu: Update Simulated Pkg Amts

verctc

Adds verification contacts for students selected for institutional verification by adding verification. This script must be customized at each institution. When customizing this script, be sure to check for duplications before the first add.

Tables/Records Used:

- ctc_rec
- stufa_rec

voidctc

Voids all remaining document tracking contacts (with a status of *expected*) when a student's aid package is rejected, denied, or nullified.

*Tables/Records Used:*ctc_rec

Financial Aid Csh Scripts

Financial Aid contains Csh scripts to automate the processing of information. Csh scripts are UNIX-based program statements that can execute a series of SQL scripts or reports. The Financial Aid Csh scripts are located in the following directory path: \$CARSPATH/modules/finaid/scripts.

The following list associates a Financial Aid menu option with the corresponding Csh script and provides a description of the script.

Note In the following list, descriptions of Csh scripts include:

- Purpose of the script
- A list of SQL statements used, if applicable
- A list of ACE reports used, if applicable
- A list of tables used, if applicable
- Menu access option, if applicable

adjaid

Adjusts financial aid award amounts. You run this script prior to running the Post Financial Aid process.

- A report that generates ISQL commands
- A SQL script that updates aid_rec amounts and inserts ctc_recs.

Tables/Records Used:

- aid_rec
- ctc_rec

docrev

Runs the financial aid document tracking processing SQL scripts at one time.

CAUTION

When modifying this script, be careful about changing the running order for the SQL scripts. Because the *dopkg* and *cmplpell* scripts depend upon contacts added and/or updated by the other SQL scripts, Jenzabar recommends the docrev Csh script runs these SQL scripts last.

- dopkg
- cmplpell
- edfatflag
- fatctc
- statctc
- loanctc
- sarctc
- typectc
- voidctc
- verctc

Menu Access: Financial Aid: Document Tracking Menu: Document Review Script

esarin

Reads in files received from EDE software, parses the data using *tpfaconv*, and loads the data in CX database using *natp* processing.

Tables/Records Used:

- natp_rec, natp0809_rec, ...natp1213_rec

Menu Access: Financial Aid: EDE Processing Menu: Input ISIR Data

fisapwork.pl

Imports a simple comma-separated file into CX that contains SSNs, college work-study amounts paid, and the student's name.

Tables/Records Used:

- fisap_rec

pcsend

Exports CX files to a PC. You must run this script on a PC using a telnet session to the UNIX host. The script creates a directory on the PC to store the files collected from CX.

pcxmit

Transfers three financial aid files to a PC using a file transfer protocol specified by the user, then renames the files.

pheaa_aid

Adds/updates actual aid records based on the pheaa_rec state grant and the pheaa_rec Pell grant. The script runs *faaudit* to update aid fund balances and student aid totals.

- A report that creates output from the PHEAA state grant tape information
- A report that creates output from the PHEAA Pell grant tape information

- A SQL script that adds/updates aid simulation records for the state and Pell grants

Menu Access: Financial Aid: Need Analysis Tape Conversion Menu:
PHEAA State/Pell Grant

pheaconv

Extracts need analysis data from a PHEAA tape.

Tables/Records Used:

- pheaa_rec

pheaagrnt

Adds aid simulation records based on the pheaa_rec state grant.

- A report that creates output from the PHEAA state grant tape information
- A SQL script that adds/updates aid simulation records for the state grant

Tables/Records Used:

- pheaa_rec

prepfisap

Builds fisap_recs based on subt_recs at the end of the year for FISAP reports.

- A report that creates output from processing subt_recs
- A SQL script that builds the fisap_recs

Tables/Records Used:

- fisap_rec
- subt_rec

Menu Access: Reports: FISAP Reports Menu: Create FISAP Reports

prtext

Prints contents of financial aid text files.

Menu Access: Financial Aid: Student Processing Menu: Print Text
Comments

refctc

Creates refund check contacts.

Tables/Records Used:

- ctc_rec

rfmsimport

Loads original Pell and Pell Disbursement acknowledgments from CPS.

Tables/Records Used:

- edepell_rec

runaudit

Executes an ACE report in the audit database.

A report that reads the audit database.

runfisap

Translates UNDG_PROG and GRAD_PROG tags in a report before you run the report.

Specified by the user.

tpext

Converts the tape data file and loads the information in the natp_rec, natp0809_rec, ...natp1213_rec.

Tables/Records Used:

- natp_rec, natp0809_rec, ...natp1213_rec

Menu Access: Financial Aid: Need Analysis Tape Conversion Menu: Extract Need Tape Data



Errors and Recovery

This section provides the following:

- A list of serious and fatal errors for Financial Aid Audit and Need Analysis Tape Conversion programs
- Crash recovery procedures

Note Refer to the following user guides for a list of the more common status, field error, and warning messages that can occur when menu users execute the programs in Financial Aid:

- Financial Aid User Guide
- Financial Aid Packaging User Guide
- Financial Aid Need Analysis User Guide
- Financial Aid Electronic Data Exchange User Guide (EDE)

Financial Aid Audit Errors

The following lists alphabetically the serious and fatal error messages that can appear when you are using Financial Aid Audit. Financial Aid Audit produces two types of error messages, processing errors and audit errors. The processing errors are run-time errors that may occur while Financial Aid Audit is running, and the audit errors are the data validation errors produced normally during an audit.

Financial Aid Audit Processing Errors

The following are the various messages printed by Financial Aid Audit during program processing and are sent by mail when the program finishes. If an error causes the program to exit before normal completion, the error will be mailed with the message "Fatal Error: program aborted" following the error. This kind of error must be resolved before Financial Aid Audit can be run again. When the error is resolved, rerun Financial Aid Audit using the same parameters.

NN audit errors found. Please check the audit output file: FFFF

This message gives the number of errors ('NN') found in the audit. The audit output file FFFF is the file created by Financial Aid Audit and contains the audit errors found.

Cannot open the error file: FFFF

The audit output file FFFF cannot be opened. Make sure that the directory CARSPATH/audit/finaid/faaudit has been created with the group carsprog able to access the directory for reading, writing, and execution. After resolving the error, rerun the program.

DBADD error on aidpkg_table: NN. Code='CC', Prog='PP', Type='TT

An error NN occurred when Financial Aid Audit attempted to add a record to the aidpkg_table. The record that Financial Aid Audit attempted to add was for

the aid code CC', academic program PP', and aid type TT'. If this error occurs, report the exact error message to your account manager for resolution of the error.

DBFIND error onfile': NN

An error NN occurred when Financial Aid Audit attempted to find a record in the database file identified. If this error occurs, call your account manager for resolution being sure to report the exact error message.

DBSELECT error onkey': NN

An error NN occurred when Financial Aid Audit attempted to select the database keykey'. If this error occurs, call your account manager for resolution, being sure to report the exact error message.

DBSELECT fileopen error onfile': NN

An error NN occurred when Financial Aid Audit attempted to open the database file. If this error occurs, call your account manager for resolution, being sure to report the exact error message.

DBSTRUCTVIEW error onfile': NN

An error NN occurred when Financial Aid Audit attempted to do a structview on the database filefile'. If this error occurs, call your account manager for resolution, being sure to report the exact error message.

DBUPDATE error onfile': NN

A database file update error NN occurred when Financial Aid Audit attempted to update the filefile'. If this error occurs, call your account manager for resolution being sure to report the exact error message.

DatabaseCC'. DBSELECT: status = NN

An error occurred when trying to open the database CC'. If the error number NN is 6001, rerun the program again. The 6001 error may occur if a dbbuild or dbstatus process is running at the time of the error. If another error number is listed or the same error happens repeatedly, call your account manager for resolution of the error.

Error in checking transaction file status: XX

An error occurred when trying to access the files in the \$CARSPATH/vchpost directory. Report the error and the error number XX to your account manager.

Financial Aid Audit Usage: -y year -l subs [-u -m -o -i id numbers]

This message is printed if the parameters passed to Financial Aid Audit are invalid. See the Parameters section above for valid parameter values and combinations, and rerun the program with the valid parameters.

Financial Aid Audit completed successfully.

This message is printed when Financial Aid Audit finishes processing an audit and shows that the program completed without getting a run-time error.

Fatal Error: program aborted.

This message is printed when a program processing error occurs that the program cannot handle. The message in the mail above this message should identify the error that caused the fatal error.

Invalid package method code:CCCC

An invalid packaging method code CCCC was passed to FAAUDDIT with the -m parameter. Rerun the program with a valid packaging method or without the -m parameter.

Invalid subsidiary code:CC'.

An invalid subsidiary ledger code CC was passed to the program for the -l parameter. Rerun the program with a valid subsidiary code.

There were no audit errors found

This message is printed when Financial Aid Audit finishes an audit and there were no audit errors found. An audit output file was not created since there were not errors.

Audit Output Error Messages

The following messages are the various audit messages produced by Financial Aid Audit and are found in the audit output file in the CARSPATH/audit/finaid/faaudit directory. The name of the audit output file is of the format of date.time where date is the date the program was run in the format YYMMDD, and time is the time the program was started in the format HHMM. For example, if the program was started at 10:03 PM on 03/21/11, the file name would be 110321.2203. See the Output Samples section below for an example of an audit output file.

Note If the update (-u) parameter was given to the program (and there were no unposted financial aid vouchers), data errors updated will have an * following the error message printed. The error message will print the invalid data value found before the update. When using the update option, errors printing without an * following the error message are errors that cannot be updated by Financial Aid Audit. If the solution to the error is not known, call your account manager for resolution of the error.

If the # symbol is printed at the beginning of an error message, the posting option to Financial Aid Entry should correct the error after Financial Aid Entry finishes and the Voucher Transactions file is posted.

These errors will be corrected the next time aid is posted.

This message is printed at the bottom of the audit and indicates that any error message containing an # can be resolved by posting financial aid for the session(s) identified on the line with the error message. Run the Financial Aid Entry posting option for the sessions indicated and post the Voucher Transactions file created. Rerun the audit to make sure that the error was cleared up.

Aid amount != posted amount

The amount in the aid_rec for the student does not equal the amount in the corresponding subt_rec. Be sure that financial aid is then posted for the session indicated on the line with the error message. Then, rerun Financial Aid Audit to make sure that the error was cleared up.

Aid amt updated but not posted

This is a warning message indicating that the aid_amt amount was updated in Financial Aid Entry, yet has not been disbursed. When the next posting is done, this message should disappear.

Aid type not found: not added

The aid type for the aid code identified on the same line cannot be determined. This prevents Financial Aid Audit from adding the aidpkg_table for the aid code. Be sure that the aid code value is valid according to the aid_table and that the taid_frm_code for the aid code is a valid code from the taid_form_table. Then make sure that the taidform_type is a valid type according to the aid_type_table for the aid form. After validating and updating the aid_table,

aid_form_table, and aid_type_table for the aid code, rerun Financial Aid Audit with the updated option.

Amt stat should be AD *, Amt stat should be AP *, Amt stat should be AP *, Amt stat should be EA or AA *

An invalid or incorrect aid status was found in the aid_amt_stat field. If the * is printed, the aid_amt_stat field will have been updated to the identified amount status value. The last error message, Amt stat should be EA or AA *, the aid_amt_stat field will have been updated to AA by default. If the status should have been EA, update the amount status through Financial Aid Entry. If the * is not printed with the error message, run Financial Aid Audit with the update option.

Award amount != aid total *

The taidpkg_awd_amt amount for an aid code is incorrect according to the aid_rec. If the * is printed, the amount will have been updated. If not, run Financial Aid Audit with the updated option.

Cancel amount != aid total *

The taidpkg_cancel_amt amount for an aid code is incorrect according to the aid_rec. If the * is printed, the amount will have been updated. If not, run Financial Aid Audit with the updated option.

Disb amount != aid total *

The taidpkg_disb_amt amount for an aid code is incorrect according to the aid_rec. If the * is printed, the amount will have been updated. If not, run Financial Aid Audit with the updated option.

Fund balance audit error total: NN

This message shows that NN errors were found in the second pass of Financial Aid Audit that audits the fund balances in the aidpkg_table.

Invalid aid code

An invalid aid_code was found in the aid_rec according to the aid_table. If the aid_code is a valid code, add it to the aid_table. If the aid_code is not valid, update the aid_code field. Rerun FAAUDIT with the update option to ensure that the aidpkg_table has been updated properly for this aid code.

Invalid aid status

An invalid aid_stat value was found in an aid_rec for the aid code identified on the same line. Fix the aid status value through the Financial Aid Entry program and rerun Financial Aid Audit with the update option.

Invalid amount status

An invalid aid_amt_stat value was found in the aid_rec. The amount status value can be updated by the Financial Aid Audit program if the aid_stat value is valid in the same aid_rec. An invalid package method was found in the aid_rec. This will occur only if the -m parameter is not used or is ALL. If the package method is valid, add it to the pkg_table. If the package method is not valid, update the aid_pkg_field. Rerun Financial Aid Audit with the update option to update the aidpkg_table properly.

Invalid package status

An invalid stufa_pkg_stat was found in the stufa_rec for the student identified on the same line. Update the package status through the Financial Aid Entry program and rerun Financial Aid Audit to ensure that the error and any related errors are corrected.

Invalid packaging status

An invalid aid_pkg_stat was found in the aid_rec. Update the packaging status through the Financial Aid Entry program.

Invalid program code

An invalid program code was found in the stufa_prog field for the identified student. Update the program value through the Financial Aid Entry program and rerun Financial Aid Audit with the update option to make sure that the aidpkg_table has the correct amount totals.

No aid recs: awd amt != 0 *

An aidpkg_table was found with an taidpkg_awd_amt not equal to zero for an aid code and academic program code combination that cannot be found in the aid_rec and stufa_rec. If the * is printed, the amount has been updated to zero. If not, run Financial Aid Audit with the update option to zero the amount.

No aid recs: cancel amt != 0 *

An aidpkg_table was found with an taidpkg_cancel_amt not equal to zero for an aid code and academic program code combination that cannot be found in the aid_rec and stufa_rec. If the * is printed, the amount has been updated to zero. If not, run Financial Aid Audit with the update option to zero the amount.

No aid recs: disb amt != 0 *

An aidpkg_table was found with an taidpkg_disb_amt not equal to zero for an aid code and academic program code combination that cannot be found in the aid_rec and stufa_rec. If the * is printed, the amount has been updated to zero. If not, run Financial Aid Audit with the update option to zero the amount.

No pkg table: awd amt > 0 * , No pkg table: cancel amt > 0 * , No pkg table: disb amt > 0 *

Based on the aid_rec and stufa_rec, an aidpkg_table should be added and the indicated amount updated for the aid code and program code identified on the same line as this message. If the * is printed, the aidpkg_table will have been added. If not, run Financial Aid Audit with the update option to correct the error.

Simulation: disb amt != 0 *

A simulated package method had a disbursed amount not equal to zero. If the * is printed, the aidpkg_table will have been updated to zero. If not, rerun Financial Aid Audit with the -u parameter to correct the error.

Simulation: cancel amt != 0 *

A simulated package method had a disbursed amount not equal to zero. If the * is printed, the aidpkg_table will have been updated to zero. If not, rerun Financial Aid Audit with the -u parameter to correct the error.

Student audit error total: NN

This message is printed following the audit and gives the number of audit errors found in the first pass of the Financial Aid Audit program.

Total aid != offered amount *

The stufa_tot_offer field contains an invalid amount according to the student's aid package. If the * is printed, the error will have been corrected. If not, run Financial Aid Audit with the update option to correct the error.

Unposted fin. aid voucher: FAcXXXXX

A financial aid voucher transaction file FAcXXXXX was found when the -u option was passed to Financial Aid Audit.

Override option specified. Update will take place. Update aborted. Run Financial Aid Audit after voucher file(s) to update.

If there are unposted financial files when the -u parameter is used, one of these two messages will be mailed to the user. If the -o parameter was used the update will continue; if the -o option was not used, Financial Aid Audit will not update errors and the Update aborted . . . error message will be mailed to the operator. To update errors if the update was aborted: rerun Financial Aid Audit after either posting the voucher transactions, removing the file FAcXXXXX from the CARSPATH/vchpost directory, or use the -o parameter.

Crash Recovery

Financial Aid Audit is designed to be rerun as often as necessary. When the program exits unexpectedly and the error is resolved, rerun the program.

Tape Conversion Errors

The following are the various messages printed by Financial Aid Tape Conversion during program processing and are sent by mail when the program finishes.

Cannot process GWEN H. GUNDERS Serial = 357: Blank SS No.

Any time a blank Social Security number is found on the tape, that student's information cannot be processed since the proper ID number cannot be determined for the student. If you wish to load the need analysis information for a student in this case, obtain the student's Social Security number and update the Social Security number field in the Need Analysis Tape Record. This is done by selecting the menu option, Update Tape SS Numbers, which displays a PERFORM screen allowing updates to the Social Security number field. Once the Social Security number is updated, rerun the NATP program.

Cannot process ORSON ODELL', SS#151-61-4789': ID record not found.

When the NATP program cannot find the listed Social Security number in the ID Record, further processing cannot be done for that student. Before the student can be added to the Financial Aid Database, the student must first be added to the ID Record. To assist in getting the names, addresses, and basic profile information for these new students, the menu option, Need Tape Leads Report will produce a report listing students on the tape who are in the ID Record. Once the students have been entered into the ID Record, rerun the NATP program.

Duplicate tape record found for SS#399-49-7782', Serial: 359.

This message is printed when duplicate student information is found in the Need Analysis Tape Record. This can happen when a need analysis tape contains duplicate records for the same student, when several cumulative tapes are loaded, or when a need analysis tape is loaded two or more times. Duplicate records are flagged when the Social Security number (natp_ss_no), need analysis revision date (natp_rev_date), MDE code (natp_tape), and award year (natp_fayr) contain the same values as another record. When duplicates are found, the NATP program will pick the record with the highest serial number (natp_no) value for processing. Duplicate records are marked with a D value in the Need Analysis Tape Record's status field (natp_stat).

ID#28116: Birthdate difference: Profile_rec = 04/17/67, Tape = 04/17/68.

ID#28116: Student marital status difference: Profile_rec = T, Tape = S.

Since the Financial Aid Office maintains its own student birthdate and marital status fields separate from the Profile Record, these warning messages are printed to identify when the need analysis tape contains different information than that found in the Profile Record. The Financial Aid Office should contact the office responsible for maintaining the Profile Record and correct the discrepancies.

SS#232-42-5781: Not processed: Tape information is not up to date.

The transaction number equals the current date and the tape date is equal to or greater than the current date.

SS#212-22-4785: Not processed: Allow Tape Update Flag is N'.

When the need analysis information loaded from the tape is older than the information in the Financial Aid Database, the NATP program will not automatically overwrite the student's data with the tape data. The second message is printed when the Allow Tape Update field (natp_allow_upd) is set to No. To force the student's information to be loaded, use the NATP overwrite (-o) option and rerun the NATP program. If only a select number of students are to be loaded using the overwrite option, it may be better to run the NATP program using the social security number option. This will prevent unwanted overwrites to occur on other students.

Error and Crash Recovery Procedure

The following procedure describes the steps to recover from a core dump of an entry program.

1. Access the program screens directory for the entry program.

Example: % cd \$CARSPATH/modules/finaid/progscr/faentry

2. Reinstall each program screen file.

Example: % make reinstall F=<filename>

You can also reinstall all of the screens by entering the following:

% make reinstall F=all

3. Attempt to execute the entry program. Did the reinstall of the program screens fix the error?

o If yes, you are done.

o If no, go to step 4.

4. Access the source code directory of the entry program.

Example: % cd \$CARSPATH/src/finaid/faentry

5. Reinstall the source code for the entry program.

Example: % make reinstall

6. Attempt to execute the entry program. Did the reinstall of the program source code fix the error?

o If yes, you are done.

o If no, go to step 7.

7. In the source code for the entry program, delete the old compiled code for the entry program.

Example: % make cleanup

8. Reinstall the entry program source code.

Example: % make reinstall

9. Attempt to execute the entry program. Did the deletion of the old code and reinstallation of the program source code fix the error?

- If yes, you are done.
- If no, go to step 10.

10. Review the libraries for the entry program. In the source code for the entry program, review the file, Makefile. In the file, search for the parameter, ADDLIBS, which identifies the libraries that you must reinstall.

Example: % vi Makefile
/ADDLIBS

11. Reinstall the libraries and the source for the entry program.

Example: % cd <to appropriate library>
% make reinstall

% cd \$CARSPATH/finaid/faentry
% make reinstall

Note You must reinstall the source program to include any library changes.

12. Attempt to execute the entry program. Did the reinstallation of the libraries for the entry program fix the error?

- If yes, you are done.
- If no, call Jenzabar Support Services.



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