JENZABAR CX

Financial Aid

User Reference

Screens and Messages

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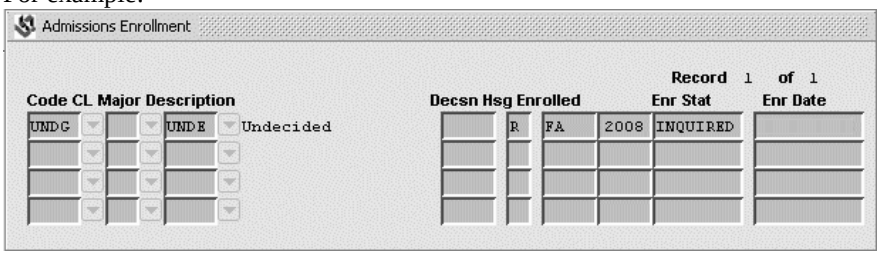
How to Use This Document

This document contains reference material for the user of CX Financial Aid. It contains descriptions of standard screens for data entry and queries as provided with the basic unmodified module. This includes neither any additional screens created for your school's unique needs, nor any special fields added to standard screens. At your site, the screens can vary in the way they are displayed and they could be customized extensively.

Use this document to look up the meaning of a field that appears on a data entry screen as follows:

1. Note the name of the screen (shown at the top of the screen).
2. Find that screen in the Table of Contents and turn to the page.
3. Note the field name.
4. Look up the field name, as listed in alphabetical order.

For example:



1. Name of the screen (**Admissions Enrollment**).
2. Turn to the page.
3. Note the field name (**Major**).
4. Look up the description:

   A code identifying the student's intended major (e.g., UNDE for Undecided).

The following chapter shows each screen that you use in CX Financial Aid and provides explanations for each of the fields on those screens. It also provides a quick reference of the commands and options you use to perform procedures in CX Financial Aid.

Screens

The screens in this section represent those contained in the Jenzabar standard product in GUI format. Screen captures show down arrows for the Table Lookup option where space permits. If your institution changes these screens and windows to meet its specific needs, your screens will look different from those shown in this section. Your screens will also look different if you use a version of Jenzabar CX earlier than 8.1.

Commands

The commands on Jenzabar CX screens can change, depending on procedures you perform or commands you have previously selected. For example, query mode and update mode display different commands. This guide describes all the commands associated with a screen. Remember that you can use a specific command only when it appears on the current command line.

This section explains the commands associated with Financial Aid, except for the universal program commands **ID-type, Query** and **Table Lookup**. For complete details about these universal program commands, see the *Getting Started User Guide.*

General Screen Commands

The following lists and describes the commands that you can use on many program screens. Note that on the GUI-format screens, you can access the commands in any of the following ways:

- Pressing the corresponding keys on your keyboard
- Clicking on the icons
- Selecting **Commands** from the menu bar and then selecting the desired command from the list of commands that appears.

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

Cancel

Does either or both of the following:

- Cancels your field entries
- Exits from the current screen

Finish

Saves your field entries. Use this command when you have completed your entries and want to continue.

Help

Displays help information.

Screen Access

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

Aid by Enrollment Status List Window

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

Access

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

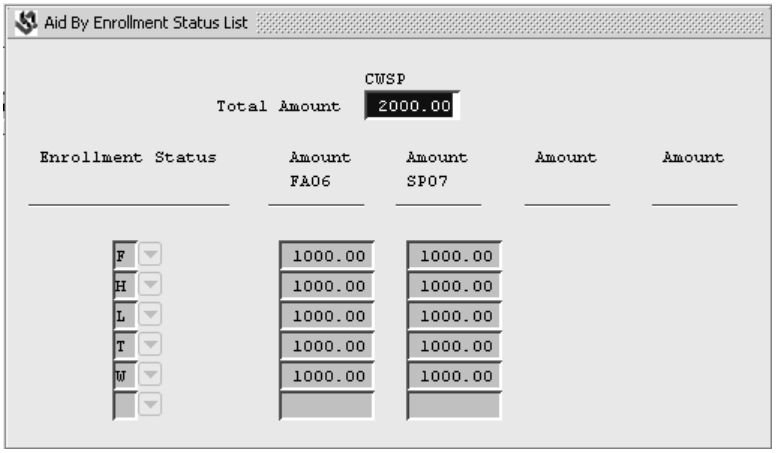
Note For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

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

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

Example

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



Fields

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

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

Amount
The whole dollar amount awarded for the specific session (e.g. 400 dollars for the session FA09).

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

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

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

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

Commands

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

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

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

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

Del-Line
Enables you to delete a line.

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

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

Lookup

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

Aid State Batch Update – Parameters Screen

The Aid State Batch Update – Parameters screen enables you to input the IDs or Social Security numbers of students for whom you want to perform a batch update of aid statuses. Use this screen when you want to change the aid statuses for multiple students.

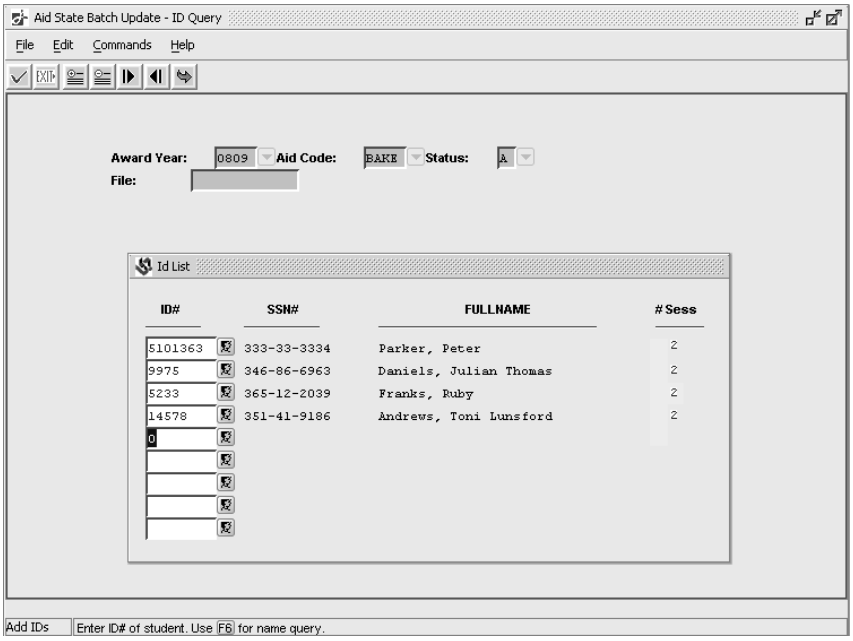
Access

Access the Aid State Batch Update – Parameters screen by selecting the following, beginning at the Financial Aid> Student Processing menu:

1. Select Aid State Batch Update.
2. Enter parameters as desired, but do not indicate a file name. Designating parameters and entering a file name into which you have entered ID or social security information for students causes the system to perform the batch update without any more intervention from you, and bypasses the Aid State Batch Update – Parameters screen.
3. Select **Finish**.

Example

Following is an example of the Aid State Batch Update – Parameters screen. The ID List window always overlays the screen as shown below.



Fields

The following fields appear on the Aid State Batch Update – Parameters screen.

 # Sess
The number of sessions for the designated award year in which the student was awarded the designated aid. For example, if the Aid code is PELL, the Award Year is 1112, and the # Sess field for Peter Parker contains a "2", the student has been awarded PELL aid for two sessions for 2011-2012.

Aid Code
A code identifying the type of aid (e.g., PELL) for which you want to update the status.

Award Year
The financial aid year for which you want to update the status.

File
The name of the file for IDs or Social Security numbers, if one is used.

Fullname
The student's name as stored in the ID record.

ID #
The student's ID as stored in the ID record.

Status
The status to which all the listed students' aid (of the designated type) will be changed upon completion of the batch update process.

SSN #
The student's Social Security number as stored in the ID record.

Commands

The following list describes the commands you can execute from the Aid State Batch Update – Parameters screen.

Add line
Opens a line so you can enter an additional student's information.

Done
Executes the batch status update process.

Edit Aid
Causes the fields above the ID List window to become active, enabling you to change the processing parameters for the batch process.

Erase line
Deletes the row of data on which the cursor resides.

Exit
Closes the screen and abandons the process.

(ID Lookup)
Activated by pressing **<F6>** or clicking the <F6> icon on the comment line, launches a search for a student in your database.

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

Page Forward

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

Award Disbursements Screen

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

Access

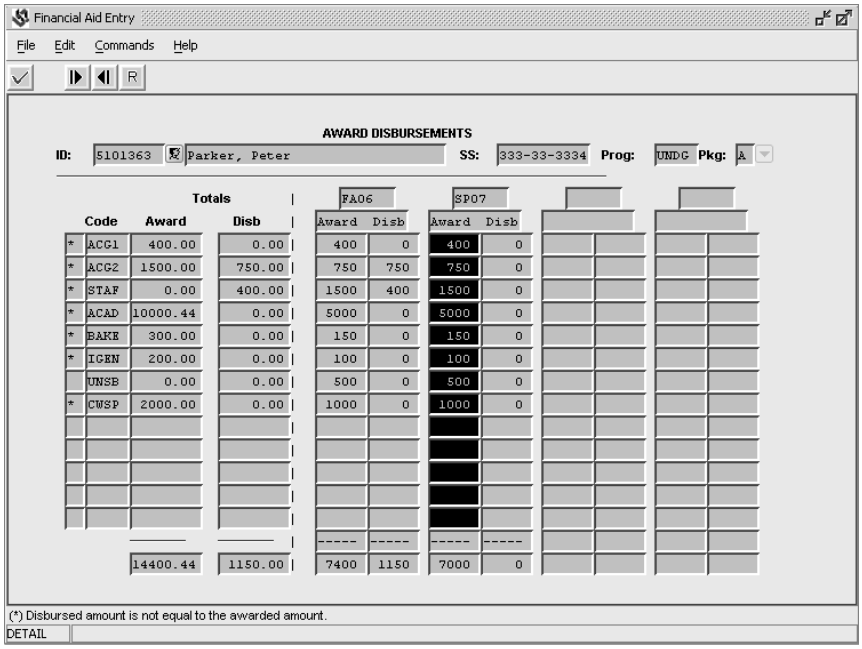
Access the Award Disbursements screen by selecting the following, beginning at the Financial Aid Entry screen:

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

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

Example

Following is an example of the Award Disbursements screen.



Segments

The Award Disbursements screen is divided into three segments.

- The Header segment provides information about the student whose awards and disbursements you are viewing.

- The Totals segment displays the total amount and the disbursed amount of each award.
- The Sessions segment displays the amount and the disbursed amount of each award for each session.

Fields on the Header Segment

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

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

ID

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

Pkg

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

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

Prog

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

SS

The student's Social Security number (e.g., 161-33-5820).

Fields on the Totals Segment

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

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

Award

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

Code

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

Disb

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

(Total)

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

Fields on the Sessions Segment

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

Note The system maintains all fields, which are display only. The specific sessions depend on the session codes you entered in the Financial Aid Entry Program Parameters screen, a maximum of four, and whether you are working with current and/or historical aid.

Award
The dollar amount of the award for each session (e.g., 530 has been awarded for the Fall 2008 session).

Disb
The dollar amount of the award that has been disbursed for each session(e.g., 0 has been disbursed for the Fall 2008 session).

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

Commands

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

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

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

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

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

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

Comments Screen

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

Access

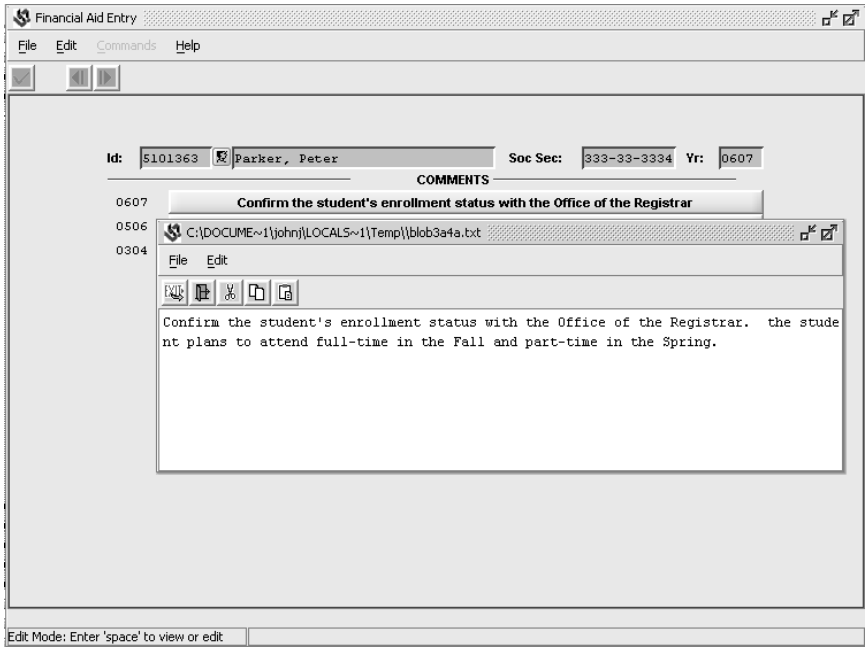
Access the Comment screen by selecting the following, beginning at the Financial Aid Entry screen:

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

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

Example

Following is an example of the Comments screen.



Fields

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

(Comments)

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

Id

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

Soc Sec

The student's Social Security number (e.g., 321-65-8734). This is a display-only field.

Yr

The financial aid award year for which you are processing awards (e.g., 1112). This is a display-only field.

Commands

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

Edit

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

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

File

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

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

Finish

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

Compliance Detail Information Screen

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

Access

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

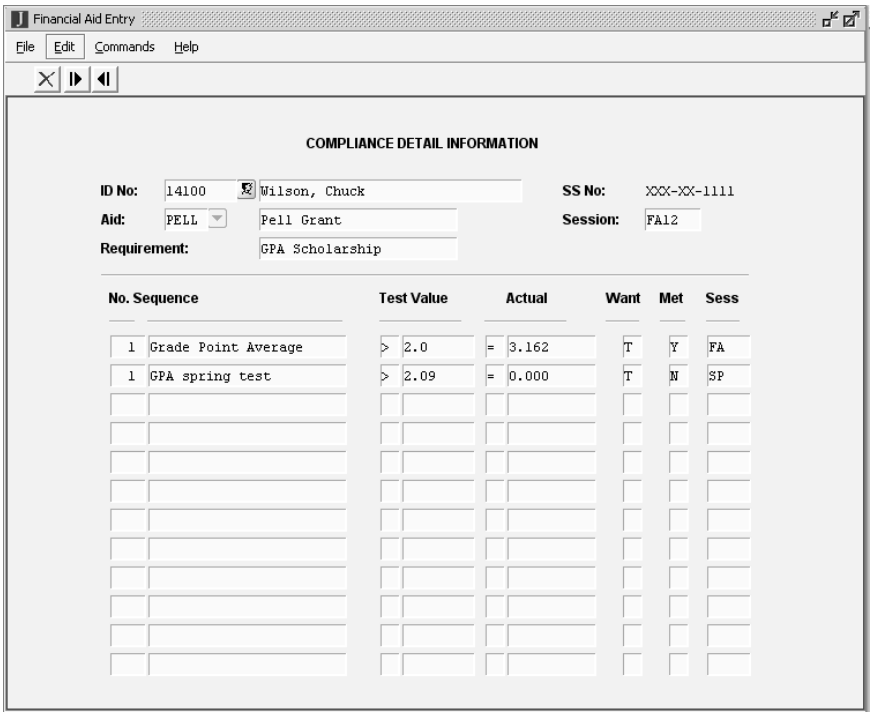
Note For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

1. Enter the desired student ID or Social Security number in the ID field, or perform a query to find the student. Select **Finished**.

2. Select **Compliance**.
3. At the Compliance Requirements screen, enter the desired aid code.
4. Enter the Session or Year in which compliance should be checked.
5. Select **Detail**.

Example

Following is an example of the Compliance Detail Information screen.



Segments

The Compliance Detail Information screen is divided into two segments:

- The Header segment provides information about the student whose requirement(s) you are viewing and the specific requirement for which you are viewing detail information. It also identifies the Session/Year in which compliance should be checked.
- The Detail segment displays the detailed compliance criteria for the specific requirement that the student must satisfy.

Fields on the Header Segment

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

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

Aid

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

ID No

The system-generated number identifying the student in the database (e.g., 5039707). The student's name appears to the right.

Requirement

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

SS No

The student's Social Security number (e.g., 321-65-8734).

Session

The session code or year in which compliance should be checked (e.g., FA12, 2012, etc.). This is a required field.

Fields on the Detail Segment

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

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

Actual

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

Met

A Y(es)/N(o) code indicating whether the compliance criteria has been met based on what the Test Value should be, what the Actual value is, and whether the Want value should be T(rue) or F(alse).

No.

The sequence number of compliance criteria. Each sequence number is arranged consecutively. All criteria with the same sequence number are included in a sequence of compliance, and the student must meet all to pass the criteria. Otherwise the student can meet the next sequence of criteria. For example, the student in the screen example must meet all criteria with a number 1 OR meet all criteria with a number 2 OR meet the criteria with a number 3 to comply with the requirement.

Sequence

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

Sess

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

Test Value

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

Want
The code indicating whether the value in the Test Value field should be T(rue) or F(alse).

Commands

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

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

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

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

Compliance Requirements Screen

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

Access

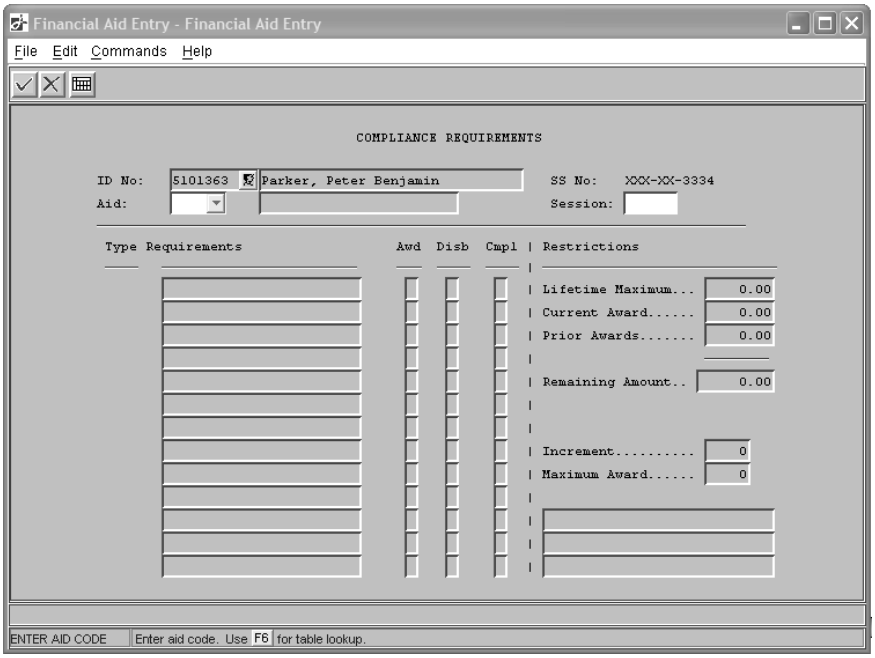
Access the Compliance Requirements screen by selecting the following, beginning at the Financial Aid Entry screen:

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

1. Enter the desired student ID or Social Security number in the ID field, or perform a query to find the student.
2. Enter the Session or Year in which compliance should be checked.
3. Select **Compliance**. Information appears when you enter an aid code.

Example

Following is an example of the Compliance Requirements screen.



Segments

The Compliance Requirements screen is divided into three segments:

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

Fields on the Header Segment

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

Aid

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

Note The aid does not have to be currently awarded.

ID No

The system-generated number identifying the student in the database (e.g., 1245740). The student's name appears to the right. This is a display-only field.

SS No

The student's Social Security number (e.g., 161-33-5820). This is a display-only field.

Session

The session code or year in which compliance should be checked (e.g., SP13, 2012, etc.). This is a required field.

Fields on the Requirements Segment

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

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

Awd

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

Cmpl

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

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

Disb

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

Requirements

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

Type

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

Fields on the Restrictions Segment

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

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

Current Award

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

Increment

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

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

Lifetime Maximum

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

Maximum Award

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

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

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

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

Commands

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

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

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

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

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

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

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

Query
Enables you to select another Aid code.

Contact Entry Screen

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

Access

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

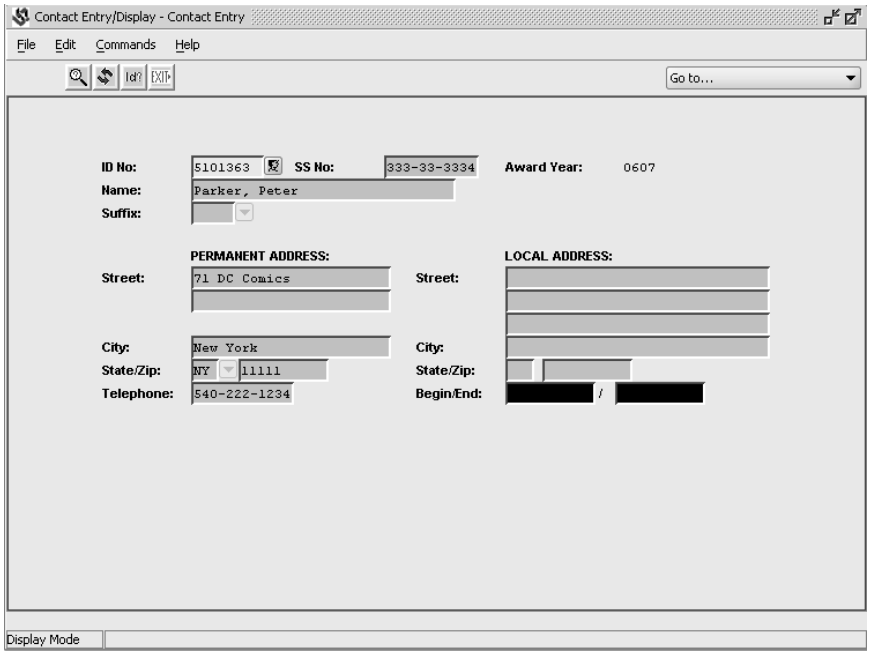
1. Student Processing
2. Pell Payment Processing
3. Contact Entry/Display

4. Enter a financial aid award year, then select **Finish**

Display information on this screen by performing a query.

Example

Following is an example of the Contact Entry screen.



Fields

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

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

Award Year

The financial aid award year in which you are processing awards (e.g., 1112). Defaults to the year you entered on the Contact Entry/Display screen.

Begin/End

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

City (Local Address)

The city of the student's local address.

City (Permanent Address)

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

ID No

The system-generated number identifying the student in the database (e.g., 1245740).

Name

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

SS No

The student's Social Security number (e.g., 161-33-5820).

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

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

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

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

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

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

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

Commands

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

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

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

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

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

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

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

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

Exit
Enables you to leave the current screen or program.

Find ID

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

Finish

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

Finished

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

ID-Type

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

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

Query

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

Scroll

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

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

Select

In Query mode, enables you to select a student.

Update

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

Contact Entry Window

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

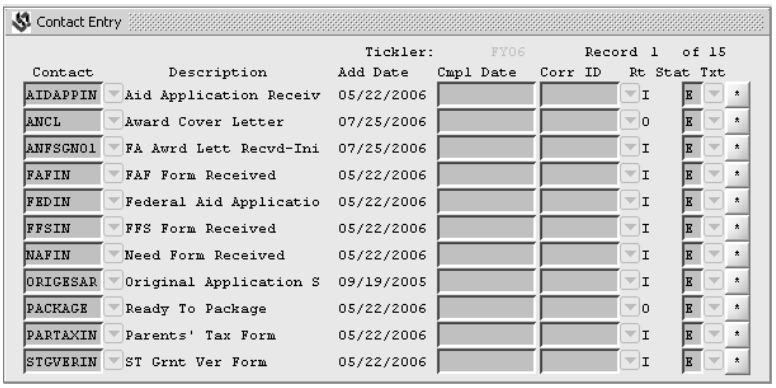
Access

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

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

Example

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



Contact	Description	Add Date	Cmpl Date	Corr ID	Rt	Stat	Txt
AIDAPPIN	Aid Application Receiv	05/22/2006			I	E	*
ANCL	Award Cover Letter	07/25/2006			O	E	*
ANFSGN01	FA Awrd Lett Recvd-Ini	07/25/2006			I	E	*
FAFIN	FAF Form Received	05/22/2006			I	E	*
FEDIN	Federal Aid Applicatio	05/22/2006			I	E	*
FFSIN	FFS Form Received	05/22/2006			I	E	*
NAFIN	Need Form Received	05/22/2006			I	E	*
ORIGESAR	Original Application S	09/19/2005			I	E	*
PACKAGE	Ready To Package	05/22/2006			O	E	*
PARTAXIN	Parents' Tax Form	05/22/2006			I	E	*
STGVERIN	ST Grnt Ver Form	05/22/2006			I	E	*

Fields

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

Add Date

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

Cmpl Date

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

Contact

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

Corr ID

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

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

Description

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

(Name)

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

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

Record

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

Rt

An I(ncoming)/O(utgoing) code indicating the routing of the contact.

Stat

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

- C(ompleted)
- E(xpected)
- V(oided)

Tickler

A code identifying the tickler to which the Contact records are associated (e.g., FY09). Defaults to the tickler associated with the financial aid year you entered on the Contact Entry/Display screen.

Txt

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

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

Commands

The following lists the commands you can execute from the screen.

Back

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

Cancel

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

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

Del-Line

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

Note You must have permission to delete a Contact record.

Finish

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

Forward

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

Insert

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

Sort

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

Contact List Window

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

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

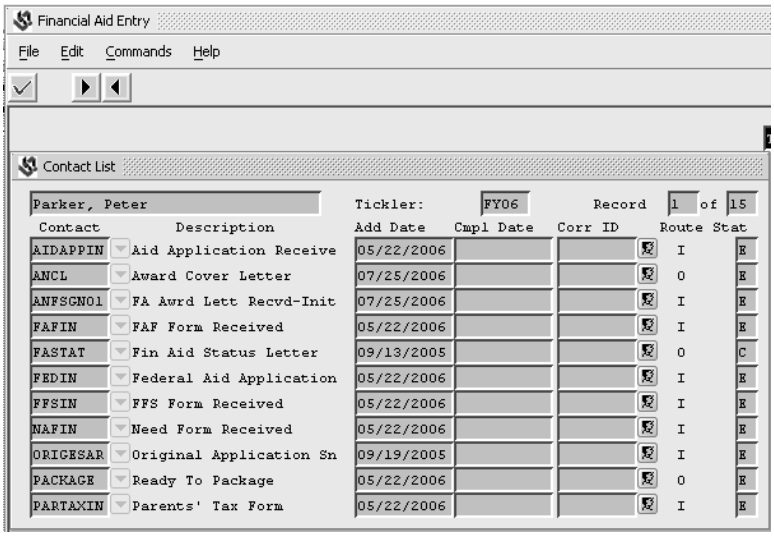
Access

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

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

Example

Following is an example of the Contact List window.



Fields

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

Add Date

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

Cmpl Date

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

Contact

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

Corr ID

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

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

Description

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

(Name)

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

Record

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

Route

An I(ncoming)/O(utgoing) code indicating the routing of the contact.

Stat

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

- C(ompleted)
- E(xpected)
- V(oided)

Tickler

A code identifying the tickler to which the Contact records are associated (e.g., FY09). Defaults to the tickler associated with the financial aid year you entered on the Contact Entry/Display screen.

Txt

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

Commands

The following lists the commands you can execute from the screen.

Close

Enables you to exit from the current screen or window.

Next

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

Previous

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

Current Fund Balances Screen

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

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

Access

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

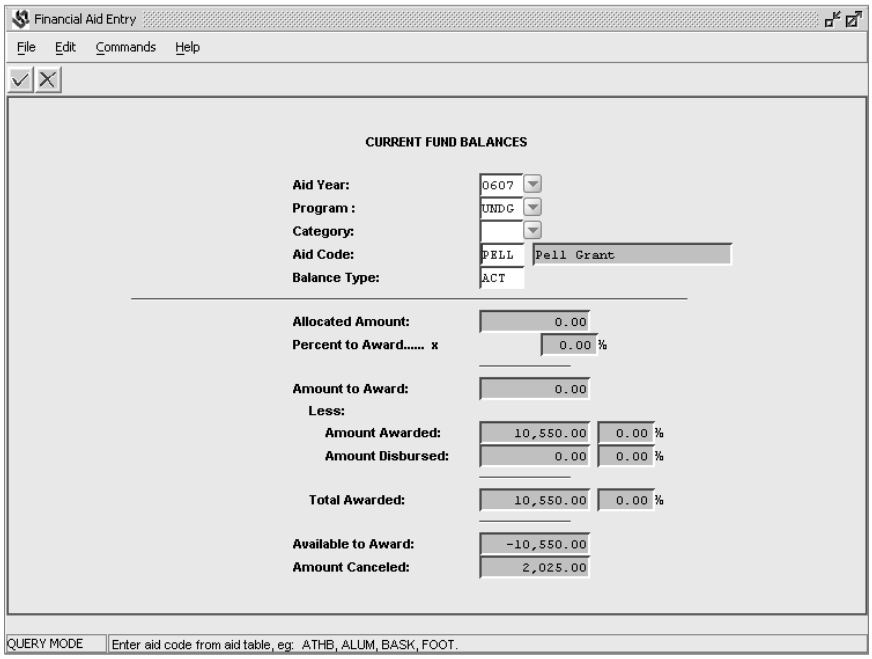
Note For more information, see the access instructions in *Financial Aid Entry Screen* in this section.

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

Note Other paths may exist.

Example

Following is an example of the Current Fund Balances screen.



Segments

The Current Fund Balances screen is divided into two segments:

- The Header segment displays the specific information for the Aid code for which you want to display current financial aid fund balances.
- The Fund Balances segment displays the fund balances for the specified Aid code and Category (if applicable).

Fields on the Header Segment

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

Aid Code

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

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

Aid Year

The financial aid year in which the aid is awarded and for which you want to check the fund balance (e.g., 1112). Defaults to the current year. Use **Table Lookup** for a list of valid years.

Balance Type

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

Category

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

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

Program

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

Fields on the Fund Balances Segment

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

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

Allocated Amount

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

Amount Awarded

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

Amount Canceled

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

Amount Disbursed

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

Amount to Award

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

Available to Award

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

Percent to Award

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

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

Total Awarded

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

Commands

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

Cancel

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

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

Close

Enables you to exit from the current screen or window.

Finish

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

Query

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

Default Initial Values Screen

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

CAUTION

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

Access

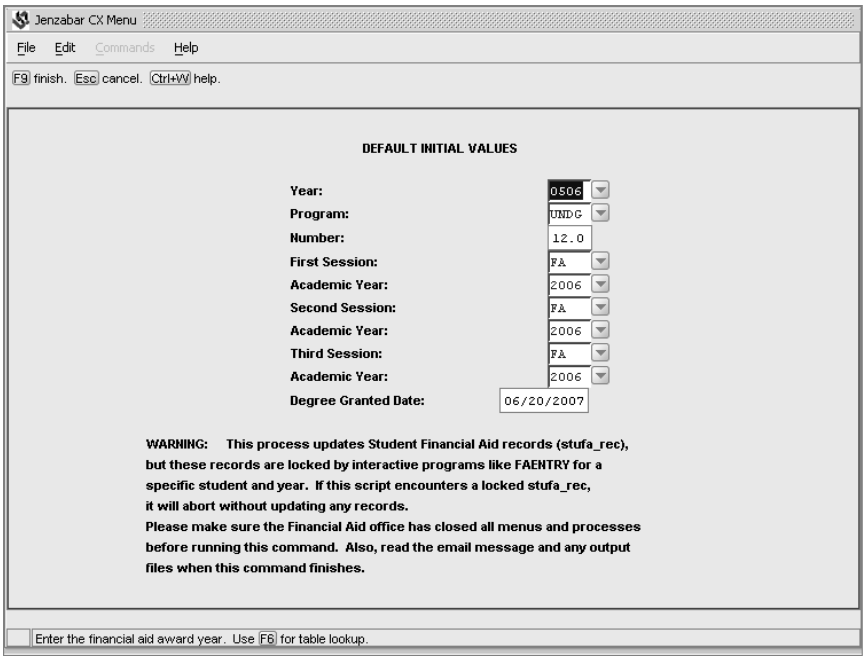
Access the Default Initial Values screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Reports
2. FISAP

3. Default Initial Values

Example

Following is an example of the Default Initial Values screen.



Fields

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

Academic Year (all fields)

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

Degree Granted Date

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

First Session

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

Number

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

Program

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

Second Session

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

Third Session

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

Year

The financial aid award year that you want to process (e.g., 1112). Defaults to the previous year. Use **Table Lookup** for a list of valid years.

Commands

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

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Disbursement Detail Screen

The Disbursement Detail screen enables you to add, update, and delete Partial Aid Records for the Aid awarded in a specific session.

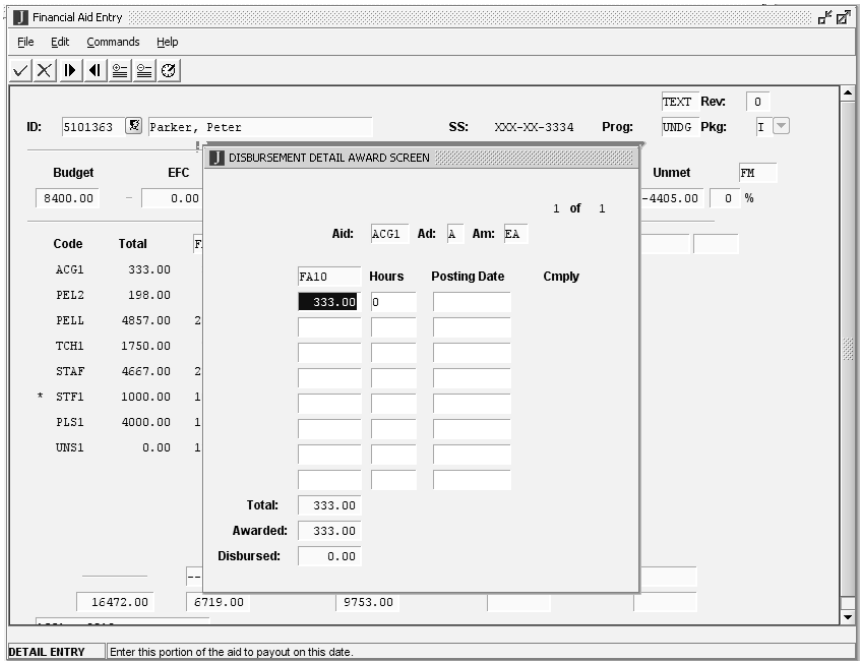
Access

Access the Disbursement Detail screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Financial Aid Entry
3. At the Financial Aid Entry screen, select **Finish**
4. Select parameters and then press **Finish**
5. Enter an ID number or Social Security Number
6. **Finish**
7. Select **Update** from the Commands menu
8. Select **Disbursements**

Example

Following is an example of the Disbursement Detail screen.



Fields

The following list describes the fields that appear on the Disbursement Detail screen.

Ad

The Aid State of the award being displayed.

Aid

The Aid Code of the award being displayed.

Am

The Amount State of the award being displayed.

Amount

The amount of one Disbursement in the award's Session.

Awarded

The award's current amount.

Cmply

Has the student completed enough class hours to satisfy this portion of the award?

Disbursed

The amount posted to the student's account at this time.

Hours

The number of coursework hours required for disbursing this amount. If 0, this limitation is not enforced on this disbursement.

Posting Date

The date to post this disbursement.

Session
The Session of the award being displayed.

Total
The total of the disbursement amounts.

Commands

The following lists the commands you can execute from the Disbursement Detail screen.

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

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

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

Help
Displays help information about the associated screen or process.

Disbursement History Screen

The Disbursement History screen enables you to view the history of changes to a specific Partial Aid Record.

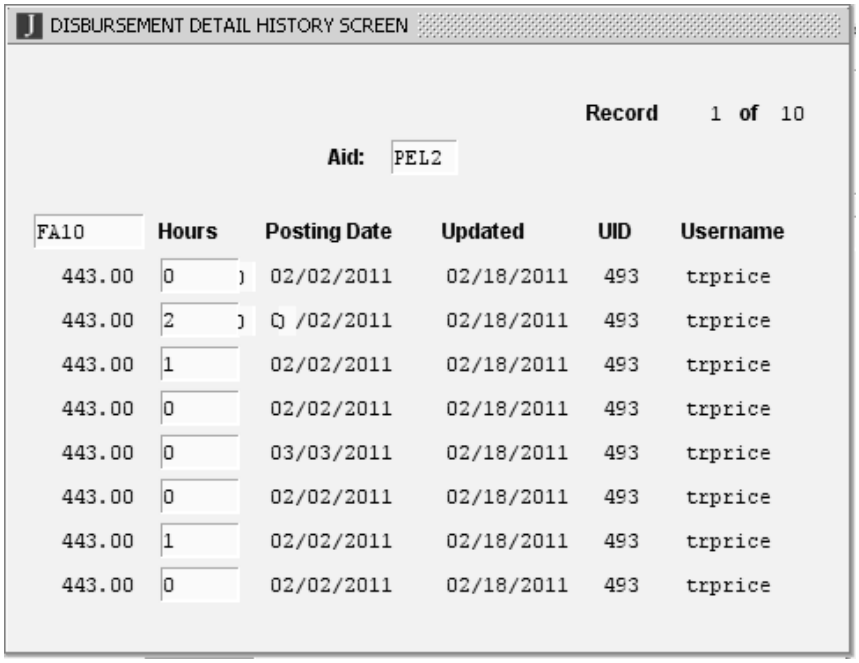
Access

Access the Disbursement History screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Financial Aid Entry
3. At the Financial Aid Entry screen, select **Finish**
4. Select the desired parameters and press **Finish**
5. Enter an ID number or Social Security number
6. **Finish**
7. Select **Update** from the Commands menu
8. Select **Disbursements**
9. Select **History**

Example

Following is an example of the Disbursement History screen.



Fields

The following list describes the fields that appear on the Disbursement History screen.

Aid:
The Aid Code of the award being displayed.

(Session)
This is an unlabeled field located at the top of the screen above the dollar amount. The award session (e.g., FA10).

Hours
The number of class-hours to receive this portion of the aid.

Posting Date
The date to payout this portion of the aid (e.g., mm/dd/yyyy).

Updated
The date the disbursement was updated (e.g., mm/dd/yyyy).

UID
The Unix userid number assigned to the user that performed the action recorded in the history record.

Username
The user's name.

Commands

The following lists the commands you can execute from the Disbursement History screen.

Cancel

Exits from the current screen.

Enrollment Variance Screen

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

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

Access

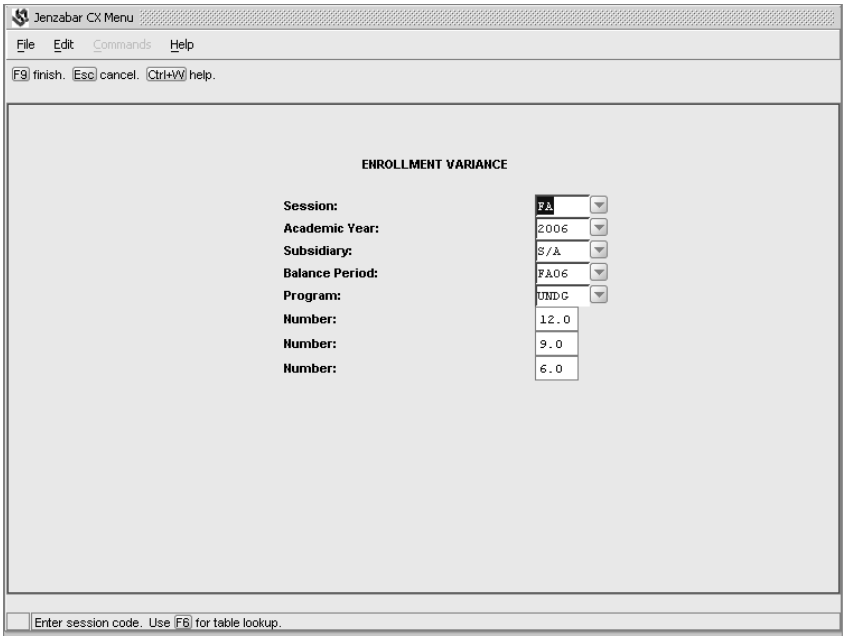
Access the Enrollment Variance screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Reports
2. Aid
3. Enrollment Variance

Note Entering a password may be necessary when selecting Aid.

Example

Following is an example of the Enrollment Variance screen.



Fields

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

Academic Year

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

Balance Period

A code identifying the balance period (e.g., FA11 for Fall 2011) to be considered for the report. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Number (Half Time Hours)

The number of enrolled hours required for a student to be considered in attendance half of the time. Defaults to 6.0.

Number (Minimum Hours)

The minimum number of enrolled hours required for a student to be considered a full-time student. Defaults to 12.0.

Number (Three Quarter Time Hours)

The number of enrolled hours required for a student to be considered in attendance three fourths of the time. Defaults to 9.0.

Program

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

Session

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

Subsidiary

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

Commands

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

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Financial Aid Entry Program Parameters Screen

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

Access

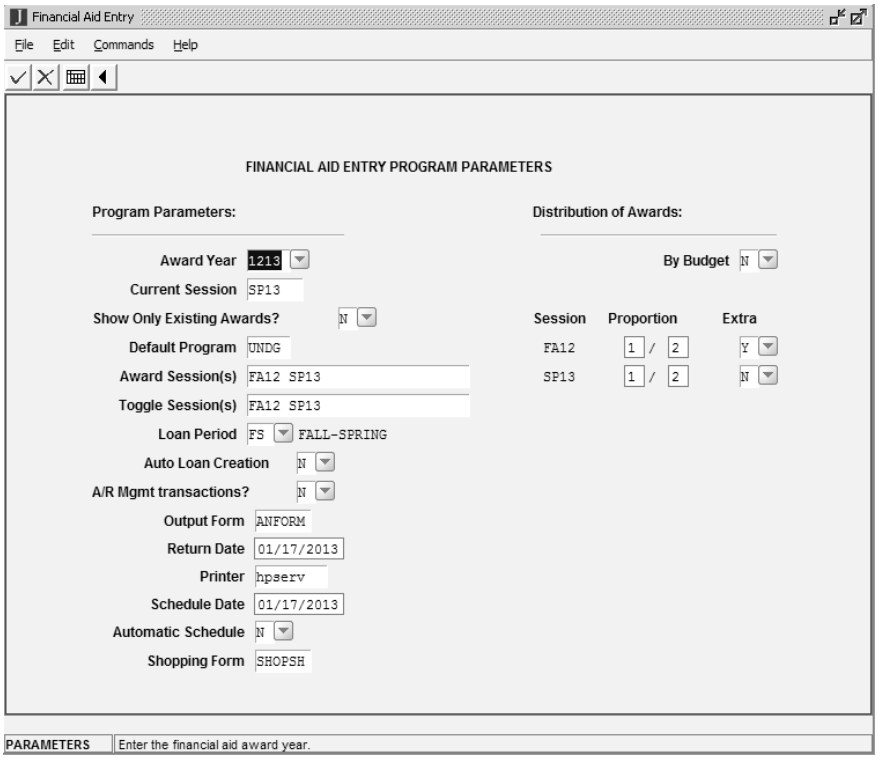
Access the Financial Aid Entry Program Parameters screen by selecting the following, beginning at the Financial Aid Main menu:

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

Note Other paths may exist.

Example

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



Fields

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

Auto Loan Creation

A Y(es)/N(o) flag that indicates whether you want the Financial Aid Entry program to create loan records for any loan automatically. If this value is set to N, Financial Aid Entry assumes you intend to create loan records manually. If this value is set to Y, if a student is awarded a loan on the entry screen, the appropriate loan record and disbursement records are automatically created.

Automatic Schedule

A Y(es)/N(o) flag that indicates whether you want to automatically schedule a shopping sheet to be scheduled if an award is changed. If this value is set to N, Financial Aid Entry assumes you intend to manually schedule a shopping sheet. If this value is set to Y and a student's awards are added or updated, a SHOPSH contact will automatically be inserted into to the student's contact record and aid history record.

Award Session(s)

The session(s) for which you want to display and enter financial aid awards (e.g., FA12 SP13). Defaults to the sessions defined in the system setup. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).

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

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

Award Year

The financial aid award year for which you are processing awards (e.g., 1112). Defaults to the current year. Use **Table Lookup** for a list of valid years.

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

By Budget

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

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

Current Session

The current academic session (e.g., FA09), according to your institution's academic calendar. Defaults to the current session.

Default Program

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

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

Extra

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

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

Output Form

A code identifying the award notification form (e.g., ANFORM) to use when you:

- Select **Output** from the Financial Aid Entry screen to print an award notification form immediately.
- Select **Schedule** from the Financial Aid Entry screen to add an award notification form contact to the student's Contact record.

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

Printer

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

Proportion

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

Return Date

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

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

Schedule Date

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

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

Session

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

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

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

Shopping Form

A code identifying the shopping sheet notification form (e.g., SHOPSH) to use when you:

- Select **Output** from the Financial Aid Entry screen to print a shopping sheet notification form immediately.
- Select **Schedule** from the Financial Aid Entry screen to add a shopping sheet notification form contact to the student's Contact record.

Commands

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

Cancel

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

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

Cumulative History

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

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

Finish

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

Lookup

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

Session Awards

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

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

Financial Aid Entry Screen

The Financial Aid Entry screen enables you to:

- Access the Financial Aid Need Analysis program
- Check disbursed aid information
- Access the interactive Financial Aid Packaging processes, if available
- Check fund balance information
- Enter initial aid awards
- Enter cumulative history information
- Modify existing aid awards
- Perform compliance checking

- Schedule or print award notification forms
- Maintain and print financial aid transcripts
- Schedule or print shopping sheet notification forms

Access

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

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

Other Financial Aid Programs

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

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

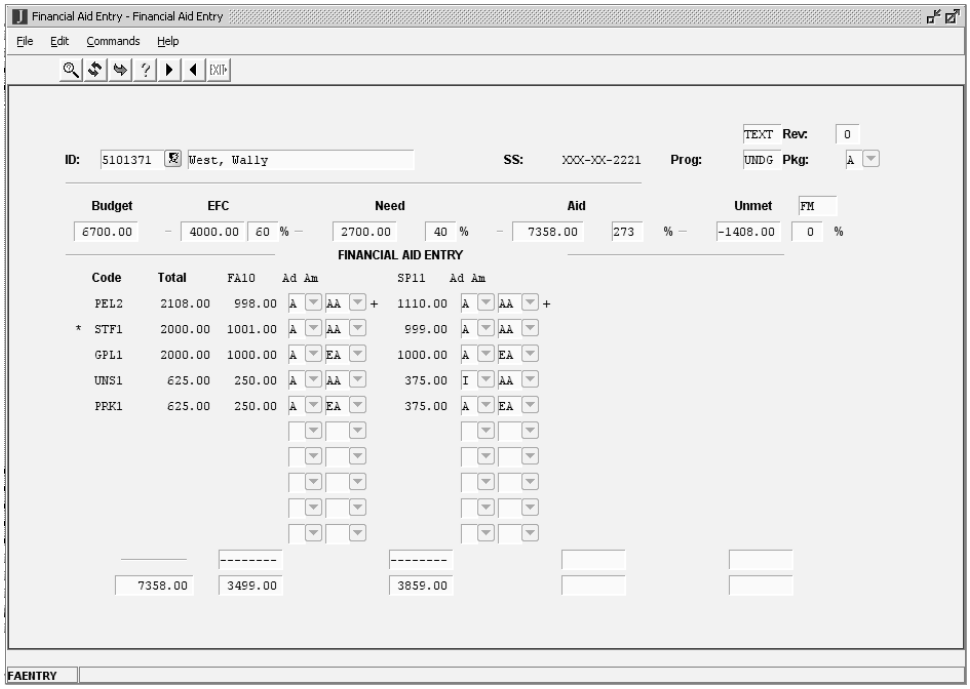
Note For more information, see the *Financial Aid Need Analysis User Guide*.

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

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

Example

Following is an example of the Financial Aid Entry screen.



Segments

The Financial Aid Entry screen is divided into three segments:

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

Fields on the Header Segment

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

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

ID

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

Pkg

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

- A (Package accepted by student)
- D (Denied by college)
- H (Hold disbursement of package)
- I (Intended package)

- N (Nullified by college)
- P (Pending student acceptance)
- R (Rejected by student)

Prog

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

Rev

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

SS

The student's Social Security number (e.g., 222-44-6586).

Fields on the Need Segment

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

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

Aid

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

Budget

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

EFC

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

(Financial Aid Need Analysis Form Record/Method)

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

Need

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

Unmet

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

Fields on the Aid Segment

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

Note

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

Ad

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

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

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

(Aid ID)

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

Am

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

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

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

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

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

Code

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

FA*YY*

The session in which the aid was awarded and the amount awarded for the session (e.g., for the code PLUS, 25.00 has been awarded for the Fall 2011 session).

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

(Grand Total)

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

(Has Disbursements)

Blank for a standard award amount, or displays a plus sign (+) when the award has Disbursement Details viewable from the "Disbs" command.

Pk

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

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

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

PREV

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

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

(Session Total)

This is an unlabeled field located at the bottom of the screen below each session field (i.e., the FA*YY* and SP*YY* fields). The total dollar amount of all aid awarded for each session (e.g., 200.00 has been awarded for the Fall 2011 session and 200.00 for the Spring 2012 session).

SP*YY*

The session in which the aid was awarded and the amount awarded for the session (e.g., for the code PLUS, 25.00 has been awarded for the Spring 2012 session).

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

Total

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

XFER

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

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

(Up/Down)

These unlabeled fields may appear to the right of the last session column shown on the screen. These fields indicate that more aid has been awarded than will fit on the screen and that you may scroll up and/or down to see more items in the list. In the example shown, only a Down field appears, indicating that this page is the first of two or more pages of aid. On subsequent pages an Up field would appear at the top of the column. You can navigate through the pages of aid as follows:

- Scroll left or right
- Use the Page Up or Page Down keys

Commands

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

Add-Line

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

Aid ID

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

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

Cancel

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

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

Close

Enables you to exit from the current screen or window.

Compliance

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

Del-Line

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

Detail

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

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

Disbursed

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

Disbs

In Update mode, accesses the Disbursement Detail window enabling you to add or update Partial Aid records for the student.

Display ID-Type

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

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

Exit

Enables you to leave the current screen or program.

Fa-Trans

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

Finish

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

Finished

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

Funds

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

Help

Displays help information about the associated screen or process.

Initialize

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

Lookup

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

Method

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

Need

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

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

Output

Enables you to print an award notification form immediately.

Package

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

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

Query

Does one of the following:

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

Schedule

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

Scroll-Screens

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

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

Text

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

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

Toggle

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

Update

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

Verify-Comp

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

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

Financial Aid Methodology Selection Window

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

Note

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

Access

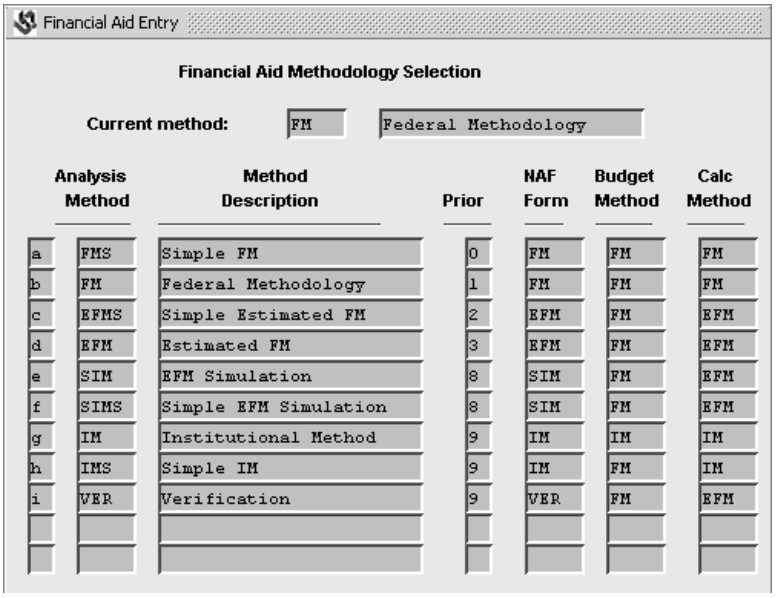
Access the Financial Aid Methodology Selection window by selecting the following, beginning at the Financial Aid Entry screen:

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

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

Example

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



Fields

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

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

Analysis Method

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

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

Budget Method

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

Calc Method

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

Current method

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

Method Description

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

NAF Form

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

Prior

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

Commands

The following lists the commands you can execute from the screen.

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

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

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

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

Select Method
Enables you to select the methodology to use.

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

Financial Aid Transcript Information Screen

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

Access

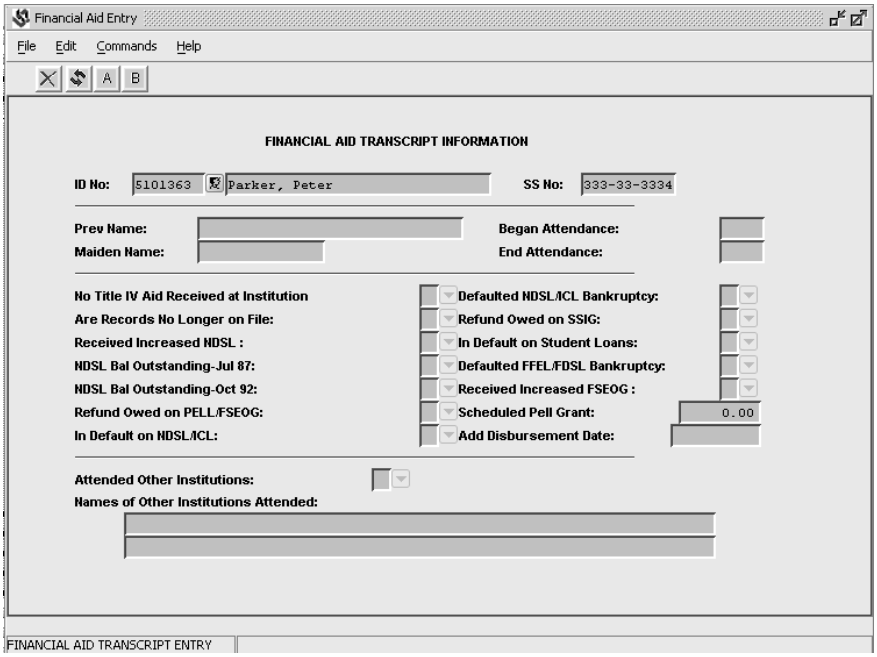
Access the Financial Aid Transcript Information screen by selecting the following, beginning at the Financial Aid Entry Screen:

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

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

Example

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



Fields

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

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

Add Disbursement Date

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

Are Records No Longer on File

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

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

Attended Other Institutions

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

Began Attendance

The year that the student began attending your institution (yyyy).

Defaulted FFEL/FDSL Bankruptcy

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

Defaulted NDSL/ICL Bankruptcy

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

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

End Attendance

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

ID No

The system-generated number identifying the student in the database (e.g., 1245740). The student's name appears to the right. This is a display-only field.

In Default on NDSL/ICL

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

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

In Default on Student Loans

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

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

Maiden Name

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

Names of Other Institutions Attended

The name(s) of other institution(s) that the student previously attended.

NDSL Bal Outstanding-Jul 87

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

NDSL Bal Outstanding-Oct 92

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

No Title IV Aid Received at Institution

A code indicating whether the student did not receive/benefit from Title IV at you institution (Y) or not (N).

Prev Name

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

Received Increased FSEOG

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

Received Increased NDSL

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

Refund Owed on PELL/FSEOG

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

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

- Pell (Federal Pell Grant)

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

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

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

Commands

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

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

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

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

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

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

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

Output
Enables you to print the financial aid transcript form.

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

Financial Aid Transcript Loan History Screen

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

Access

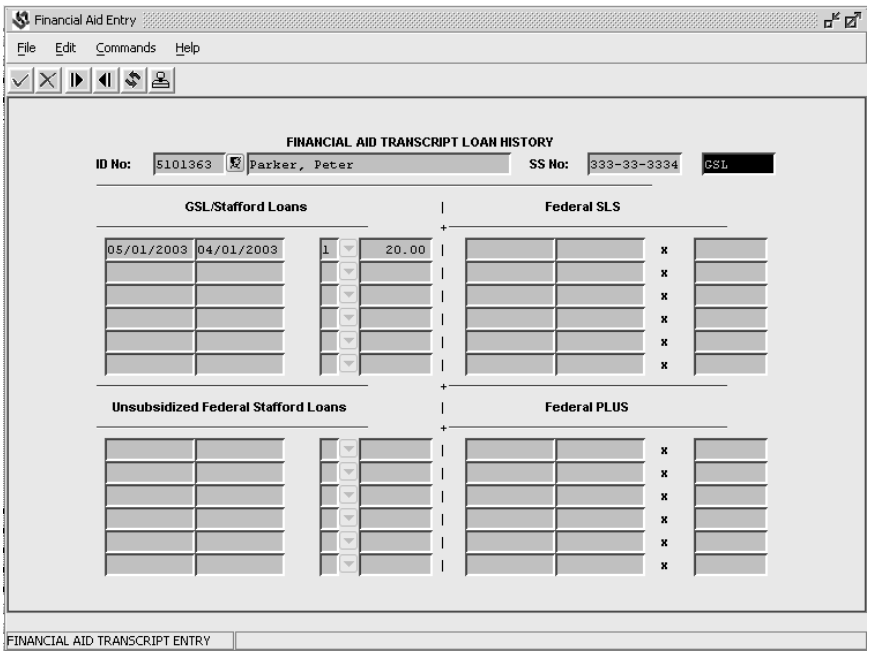
Access the Financial Aid Transcript Loan History screen by selecting the following, beginning at the Financial Aid Entry screen:

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

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

Example

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



Fields

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

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

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

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

(Beginning Date)

This is an unlabeled field located to the far left in each area. The beginning date for the loan period (mm/dd/yyyy).

(Ending Date)

This is an unlabeled field located to the right of the (Beginning Date) field in each area. The ending date for the loan period (mm/dd/yyyy).

(Grade Level)

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

ID No

The system-generated number identifying the student in the database (e.g., 1245740). The student's name appears to the right. This is a display-only field.

(Loan)

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

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

(Loan Amount)

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

SS No

The student's Social Security number (e.g., 161-33-5820). This is a display-only field.

Commands

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

Add

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

Back

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

Cancel

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

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

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

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

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

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

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

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

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

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

FISAP Data Entry Screen

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

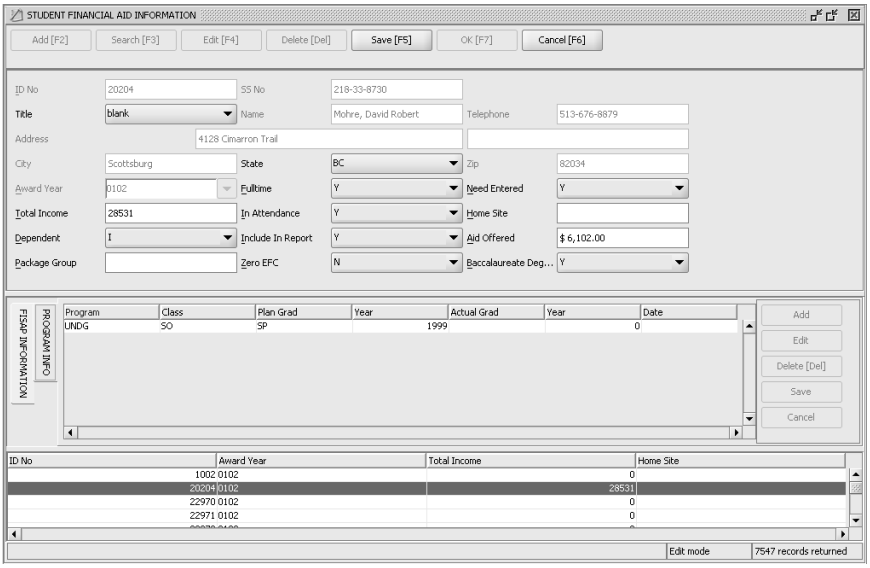
Access

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

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

Example

Following is an example of the FISAP Data Entry screen.



Segments

The FISAP Data Entry screen is divided into three segments.

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

Fields on the ID, Profile, and Program Information Segment

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

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

Address

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

City

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

Class

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

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

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

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

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

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

SS No
The student's Social Security number (e.g., 319-48-9649).

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

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

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

Fields on the Student Financial Aid Information Segment

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

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

Award Year
The financial aid award year for the FISAP report (e.g., 1112 for 2011-2012).

Baccalaureate Degree
A Y(es) or N(o) code indicating whether a dependent student has a baccalaureate or other professional degree.

Dependent
A code indicating whether the student is D(ependent) or I(ndependent).

Fulltime
A Y(es) or N(o) code indicating whether the student is enrolled full time.

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

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

In Attendance
A Y(es) or N(o) code indicating whether the student attended classes in the FISAP year.

Include In Report
A Y(es) or N(o) code indicating whether you want this student included in the FISAP report.

Need Entered
A Y(es) or N(o) code indicating whether a valid need analysis is complete for the student for the current FISAP year.

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

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

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

Zero EFC
A Y(es) or N(o) code indicating whether the student meets the automatic Zero EFC (Expected Family Contribution) condition.

Fields on the FISAP Information Segment

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

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

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

Program
A code identifying the student's academic program.

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

Commands

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

Add
Creates a new row in the active table.

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

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

Delete
Deletes the row on the screen from the active table.

Edit
Places the cursor in the first field of the current table for you to modify as many fields as necessary.

Finish
Saves your field entries. Use this command when you have completed your entries and creates/updates the records.

OK
In Search mode, executes the search based on your criteria.

Save
Stores your entry in the database.

Search
Searches the database based on values you enter into the fields on the screen.

Gainful Employment Data Entry Screen

The Gainful Employment Data Entry screen enables you to enter information to that determines whether an educational program is eligible for funding under the Title IV programs. To be eligible, the program must lead to a degree (associate, bachelor's, graduate, or professional) or prepare students for "gainful employment in a recognized occupation."

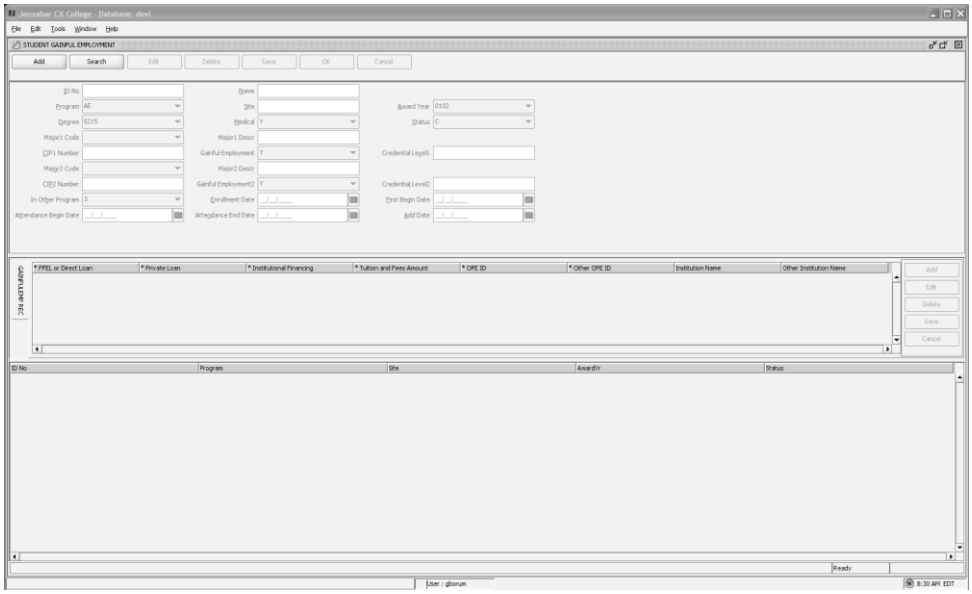
Access

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

1. Reports
2. Gainful Employment
3. GE Data Entry
4. Finish

Example

The following is an example of the Gainful Employment Data Entry screen.



Segments

The Gainful Employment Data Entry screen is divided into three segments.

- The upper segment identifies the student whose Gainful Employment data you are viewing and provides all fields in stuge_rec.
- The middle segment provides detail information about the Gainful Employment record information, and has a one-to-one relationship with stuge_rec.
- The bottom segment provides search results.

Fields on the ID Information Segment

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

Add Date
The date the gainful employment record was added.

Attendance Begin Date
The date the student first attended program in award year.

Attendance End Date
The date the student last attended program in award year.

Award Year
The financial aid award year for which you are processing awards (e.g., 1112). Defaults to the current year. Use **Table Lookup** for a list of valid years.

CIP1 Number
The first classified instruction program code associated with the .student's major.

CIP2 Number
The second classified instruction program code.

Credential Level1
The credential level for the student's first major.

Credential Level2
The credential level for the student's second major.

Degree
Code that identifies the type of degree this student has earned or is attempting to earn..

Enrollment Date
The date the student enrolled in the program.

First Begin Date
The date the student first enrolled in the major.

Gainful Employment
A Y(es)/N(o) flag indicating whether the student's major is valid for gainful employment.

Gainful Employment2
A Y(es)/N(o) flag indicating whether the student's second major is valid for gainful employment.

ID No.
The student's identification number.

In Other Program
A code indicating whether the student is involved in any other programs. Valid codes are:

- S(ame institution)
- D(ifferent institution)
- N(either)

Major 1 Code
The code indicating the student's primary major.

Major 1 Descr
The description of the student's primary major.

Major 2 Code
The code indicating the student's secondary major.

Major 1 Descr
The description of the student's secondary major.

Medical
A Y(es)/N(o) flag indicating whether a medical internship is required for this student..

Name
The student's name (e.g., Smith, John H.,, Jr.).

Program
The degree program the student is enrolled in (e.g., UNDG).

Site

The location where the student attends classes. Use **Table Lookup** for a list of valid sites.

Status

The student's status with regard to major. Valid codes are:

- C(ompleted)
- W(ithdrawn)
- E(nrolled)

Fields on the Gainful Employment Record Segment

The following list describes the fields that appear on the Gainful Employment Record segment of the Gainful Employment Data Entry screen.

FFEL or Direct Loans

A Y(es)/N(o) flag indicating whether student received FFEL or Direct Loans at any time for attendance in the educational program.

Institution

The official name of the institution as included on the institution's Department of Education's ECAA (Eligibility and Certification Approval) Report.

Institutional Financing

The total dollar amount owed by student from institutional financing plans for attendance in the educational program.

OPE ID

The institution's OPEID from the Department of Education.

Other Inst

The official name of the different institution at which the student is enrolled in an educational program.

Other Program's OPE ID

The OPE ID of the educational program in which the student is enrolled at a different institution.

Private Loans

The gross dollar amount of private educational loans received by the student at any time in the educational program.

Tuition and Fees Amount

The amount of tuition and fees charged to the student for enrolling in and attending the educational program.

Fields on the Lower Segment

The following list describes the fields that appear on the Registration Information segment of the Gainful Employment Data Entry screen. Note that these fields are display only.

AwardYr

The financial aid award year for which you are processing awards (e.g., 1112). Defaults to the current year. Use **Table Lookup** for a list of valid years.

ID No.
The student's identification number.

Program
The degree program the student is enrolled in (e.g., UNDG).

Site
The location where the student attends classes. Use **Table Lookup** for a list of valid sites.

Status
The student's status with regard to major. Valid codes are:

- C(ompleted)
- W(ithdrawn)
- E(nrolled)

Commands

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

Add
Creates a new row in the active table.

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

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

Delete
Deletes the row on the screen from the active table.

Edit
Places the cursor in the first field of the current table for you to modify as many fields as necessary.

Finish
Saves your field entries. Use this command when you have completed your entries and creates/updates the records.

OK
In Search mode, executes the search based on your criteria.

Save
Stores your entry in the database.

Search
Searches the database based on values you enter into the fields on the screen.

Holds Window

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

Access

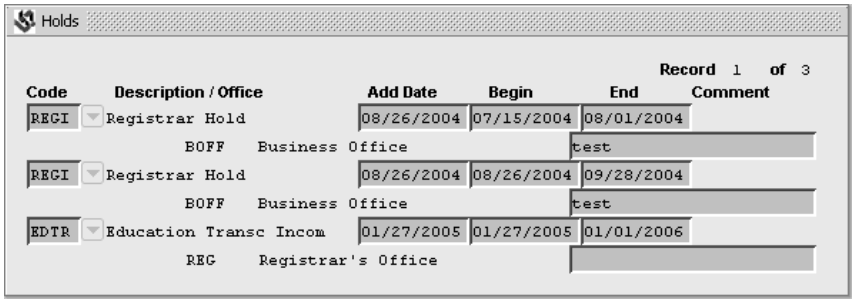
Access the Holds window from the Financial Aid Entry screen by selecting the following:

1. Scroll Screens
2. Holds-Info

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

Example

Following is an example of the Holds window.



Fields

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

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

Add Date

The date that the Hold record was added (mm/dd/yyyy).

Begin

The beginning date of the hold (mm/dd/yyyy).

Code

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

Comment

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

Description/Office

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

End

The ending date of the hold (mm/dd/yyyy).

Record

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

Commands

The following lists the commands you can execute from the screen.

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

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

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

Import Workstudy File Screen

The Import Workstudy File screen allows you to import a simple comma-separated file into CX that contains a student's SSN, college work-study amounts paid, and name.

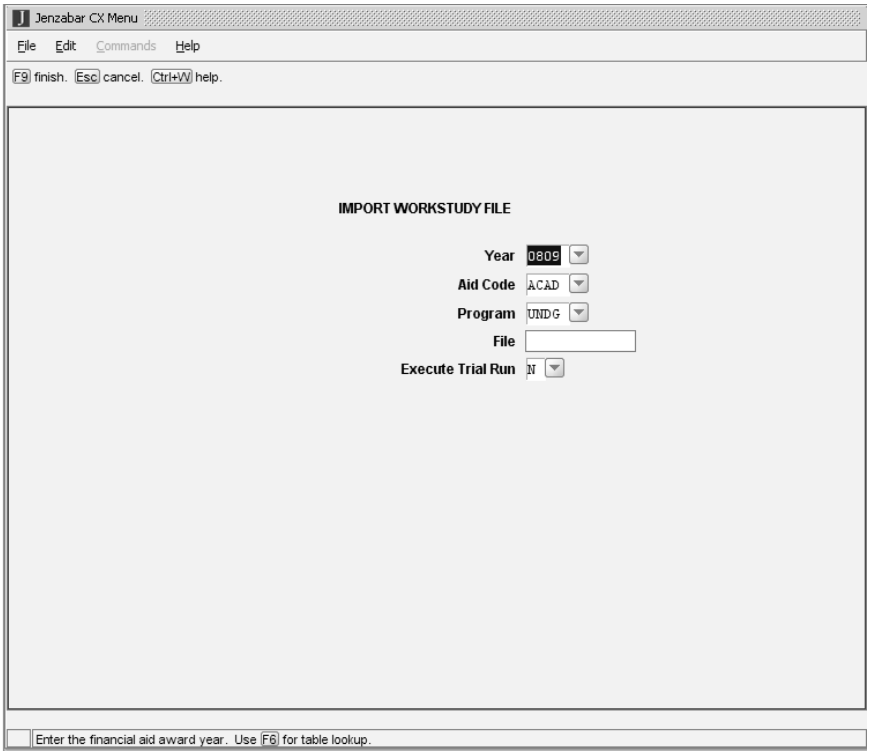
Access

Access the Import Workstudy File screen by selecting the following:

1. Student Management
2. Financial Aid
3. Reports
4. FISAP

Example

Following is an example of the Import Workstudy File screen.



Fields

The following list describes the fields that appear on the Import Workstudy File screen.

Year
The financial aid award year (e.g., 1112).

Aid Code
A code identifying the type of financial aid (e.g., ACAD).

Program
A code identifying the program (e.g., UNDG).

File
The filename containing the list of SSNs with amounts to process.

Execute Trial Run
A Y(es)/N(o) flag that indicates whether to run the process without updating the database records. The default is N(o).

Commands

The following lists the commands you can execute from the screen.

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

- Backs out of the current command
- Returns to the previous command

- Exits from the current screen or window

Finish

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

Help

Displays help information about the associated screen or process.

Label Parameters Window

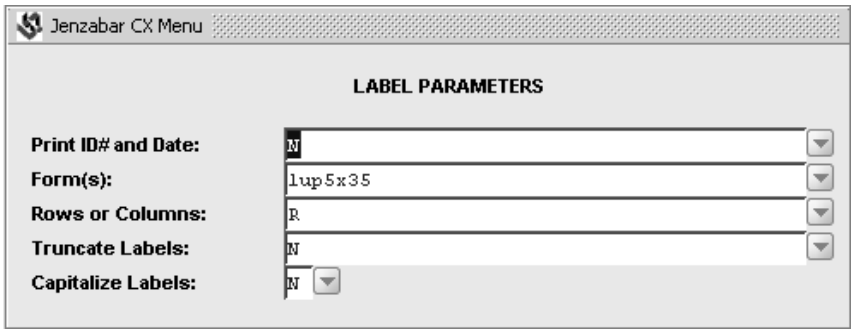
Many of the processes relating to Financial Aid result in a Label Parameters window. This window appears throughout CX when you are creating letters and/or labels, and lets you specify certain parameters for creating address labels.

Access

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

Example

Following is an example of the Label Parameters window.



Fields

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

Capitalize Labels

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

Note Used primarily for bulk mailings.

Form(s)

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

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

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

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

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

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

Commands

The following lists the commands you can execute from the screen.

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

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

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

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

Help
Displays help information about the associated screen or process.

Output Parameters and Scheduling Window

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

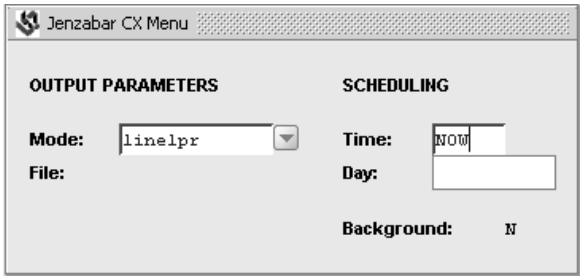
Note For more information about this window, see the *Getting Started User Guide*.

Access

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

Example

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



Fields

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

Background

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

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

Day

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

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

File

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

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

Mode

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

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

Time

The time of day the process should run.

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

Commands

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

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

Cancel

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

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

Finish

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

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

Help

Displays help information about the associated screen or process.

Post Refunds-Contacts Screen

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

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

Access

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

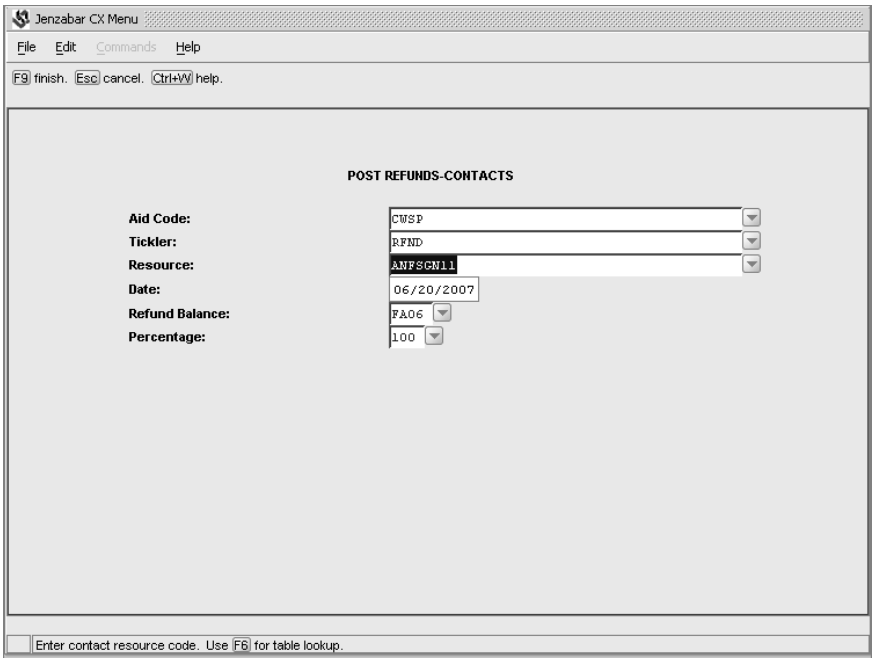
5. Student Processing
6. Refundable Aid

7. Post Refunds-Contacts

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

Example

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



Fields

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

Aid Code

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

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

Date

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

Percentage

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

Refund Balance
A code identifying the balance period (e.g., FA09) used to post refund amounts. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

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

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

Commands

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

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

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

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

Help
Displays help information about the associated screen or process.

Post Refunds – ID Screen

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

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

Access

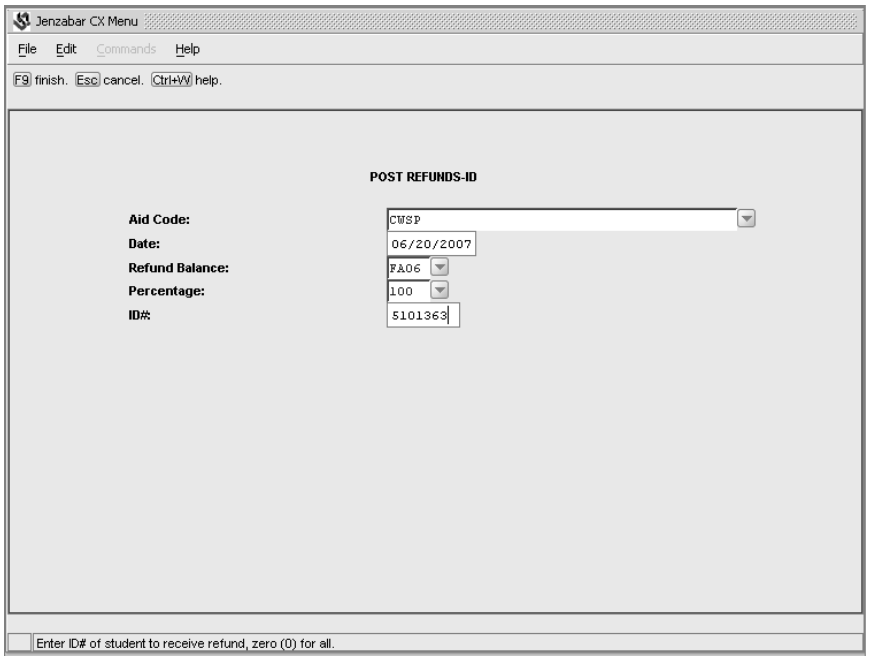
Access the Post Refunds-ID screen by selecting the following, beginning at the Financial Aid Main Menu:

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

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

Example

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



Fields

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

Aid Code

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

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

Date

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

ID#

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

Percentage

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

Refund Balance

A code identifying the balance period (e.g., FA09 used to post refund amounts. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Commands

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

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Print Award Notices Screen

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

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

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

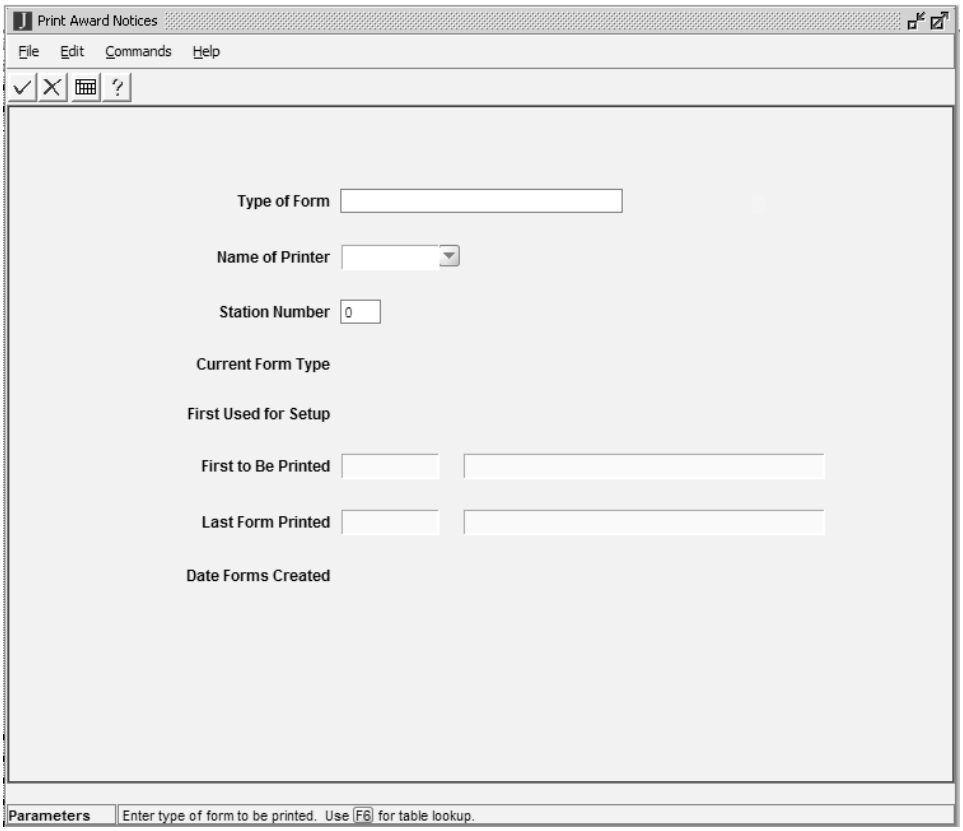
Access

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

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

Example

Following is an example of the Print Award Notices screen.



Fields

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

Current Form Type

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

Date Forms Created

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

(First Form Identifier)

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

First to Be Printed

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

First Used for Setup

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

Note Award notices do not use this field.

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

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

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

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

Note Generally, award notices do not use this field.

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

Commands

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

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

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

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

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

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

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

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

Help
Displays help information about the associated screen or process.

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

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

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

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

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

Start
Enables you to start printing forms.

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

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

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

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

Access

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

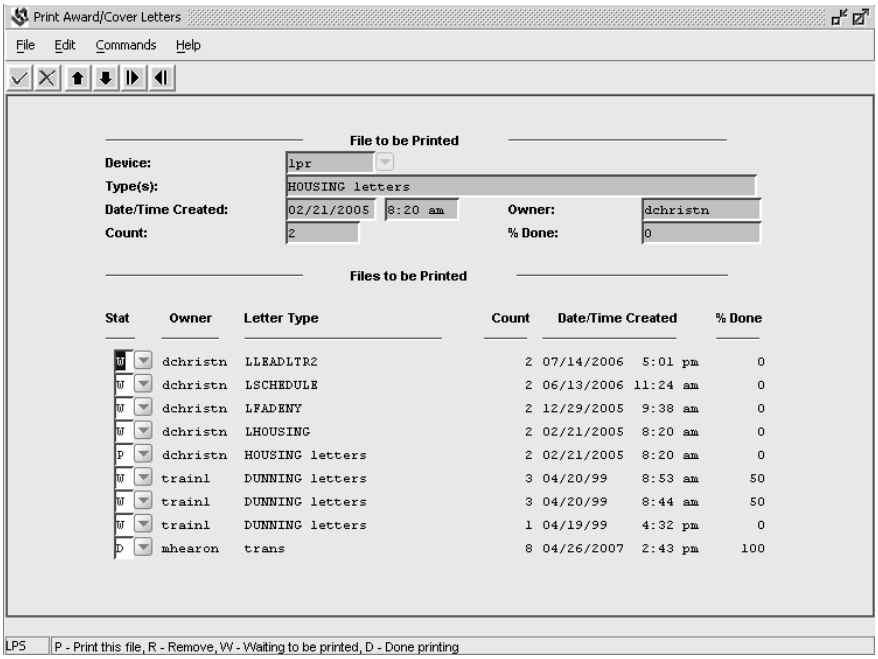
1. Award/Cover Letters
2. Print Award/Cover Letters
3. Finish

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

Example

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

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



Segments

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

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

Fields on the File to Be Printed Segment

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

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

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

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

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

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

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

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

Fields on the Files to Be Printed Segment

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

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

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

Date/Time Created
The date and time the file was created (e.g., 08/01/09 4:14 pm).

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

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

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

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

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

Stat

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

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

Commands

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

Cancel

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

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

Device

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

Done

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

Down

Enables you to move forward one line at a time in the list.

Exit

Does one or both of the following:

- Quits the current screen
- Exits the program

File

Enables you to select the file to be printed.

Page Backward

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

Page Forward

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

Print

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

Subtype

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

Up

Enables you to move back one line at a time in the list.

Print Award/Cover Letters Screens – Print Log Segment

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

The Print Log segment provides information about the subtype you selected to print and enables you to select only a portion of the subtype to print, if necessary.

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

Access

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

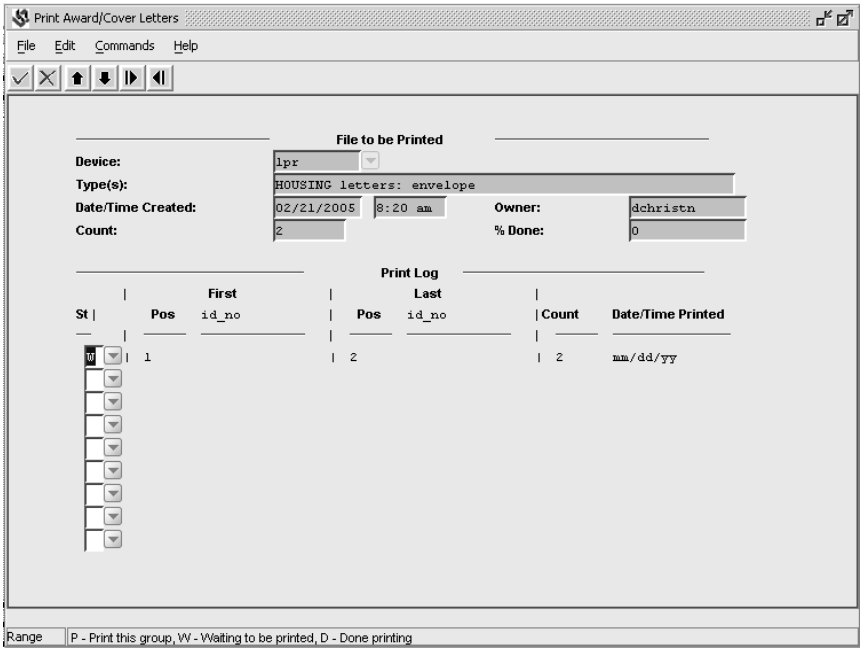
1. Award/Cover Letters
2. Print Award/Cover Letters
3. Finish
4. Enter information in the appropriate fields on the Print Award/Cover Letters screen in the Subtypes to Be Printed segment.
5. Done

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

Example

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

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



Segments

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

- The File to Be Printed segment provides information about the file you selected to print. This segment appears in the same area on each screen and does not change. However, the information that appears in the fields changes depending on the information you entered in the fields on the preceding screens.
- The Print Log segment provides information about the subtype you selected to print. You can select only a portion of the subtype to print, if necessary.

Fields on the File to Be Printed Segment

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

Fields on the Print Log Segment

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

Count
The total number of the subtype to be printed (e.g., 4).

Date/Time Printed
The date and time the subtype is to be printed.

First Pos
The first of the subtype to be printed (e.g., 1).

First id_no
The ID number of the first subtype to be printed.

Last Pos
The last of the subtype to be printed (e.g., 4).

Last id_no
The ID number of the subtype to be printed.

St
A code identifying the status of the subtype. Valid codes are:

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

Commands

For a list of the commands that you can execute from the Print Award/Cover Letters screen with the Print Log segment, see the *Print Award/Cover Letters Screens – Subtypes to Be Printed Segment* in this section.

Print Award/Cover Letters Screens – Subtypes to Be Printed Segment

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

The Subtypes to Be printed segment provides information about the subtypes (e.g., letters and envelopes) in the file you selected to print and enables you to select which subtype you want to print.

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

Access

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

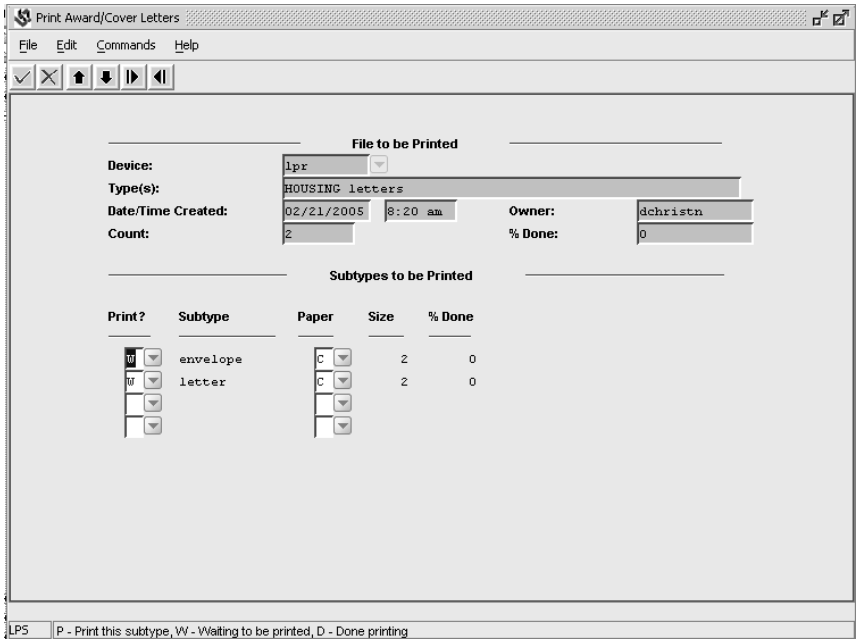
1. Award/Cover Letters
2. Print Award/Cover Letters
3. Finish
4. Select the file(s) you want to print from the list on the Print Award/Cover Letters screen located in the Files to Be Printed segment.
5. Done

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

Example

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

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



Segments

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

- The File to Be Printed segment provides information about the file you selected to print. This segment appears in the same area on each screen and does not change. However, the information that appears in the fields

changes depending on the information you entered in the fields on the preceding screens.

- The Subtypes to Be Printed segment provides information about the subtypes (e.g., letters and envelopes) in the file you selected to print. You can select which subtype to print.

Fields on the File to Be Printed Segment

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

Fields on the Subtypes to Be Printed Segment

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

Paper
A code indicating whether you want to print the output on continuous form (C) or single sheet (S) paper.

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

Note For example, if all the envelopes in a file were printed, 100 would appear in this field for that subtype. This indicates that 100 percent of the envelopes have been printed.

Print
A code identifying the status of the subtype. Valid codes are:

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

Size
The number of the subtype to be printed (e.g., 4).

Subtype
The type of contents in the file (e.g., letters or envelopes). The Subtype informs the printer of the size of the output.

Commands

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

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

- Backs out of the current command
- Returns to the previous command

- Exits from the current screen or window

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

Down
Enables you to move forward one line at a time in the list of files or subtypes.

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

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

Up
Enables you to move back one line at a time in the list of files or subtypes.

Print Shopping Sheet Notices Screen

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

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

Note You must run the Select Shopping Sheet process before you run this process.

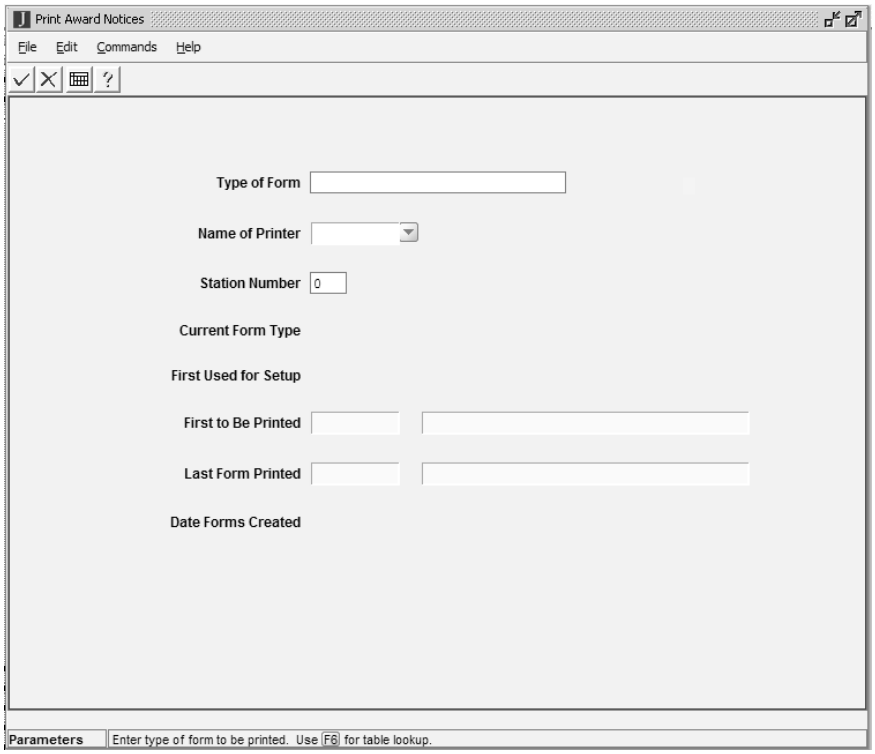
Access

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

1. Student Processing
2. Shopping Sheet
3. Print Shopping Sheet
4. At the Print Shopping Sheet screen, select **Finish**

Example

Following is an example of the Print Shopping Sheet Notices screen.



Fields

For a list of the fields in the Print Shopping Sheet screen, see the *Print Award Notices Screen/Fields* topic in this section.

Commands

For a list of the commands that you can execute from the Print Shopping Sheet screen, see the *Print Award Notices Screen/Commands* topic in this section.

Print Text Comments Screen

The Print Text Comments screen enables you to print text comments associated with a student's financial aid record(s).

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

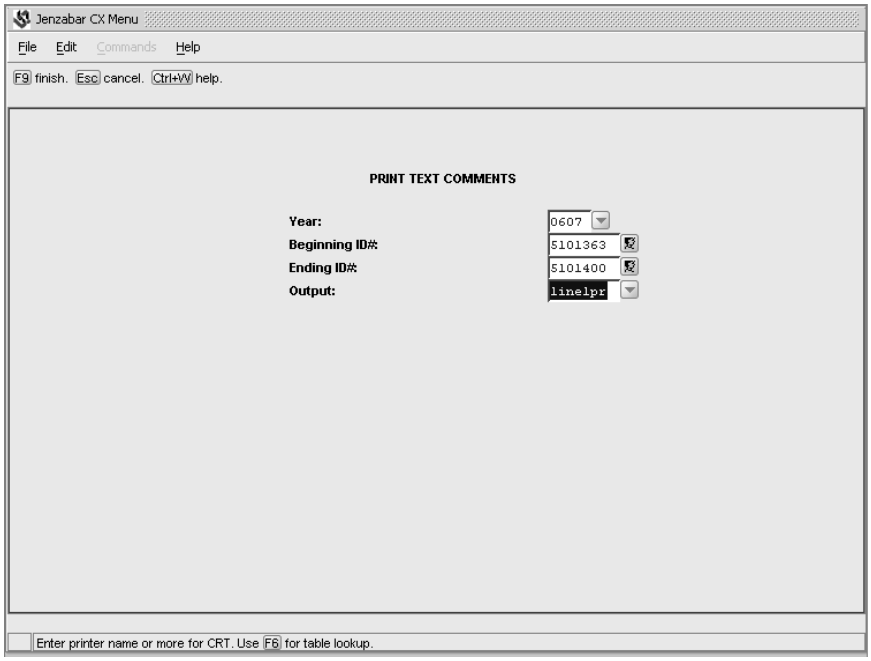
Access

Access the Print Text Comments screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Print Text Comments

Example

Following is an example of the Print Text Comments screen.



Fields

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

Beginning ID#

The first student's ID number in the range you want to print. Press **<F6>** to perform a query.

Ending ID#

The last student's ID number in the range you want to print. Press **<F6>** to perform a query.

Output

The name of the printer from which to produce the output. Use **Table Lookup** for a list of valid printers, or enter **more** to send the output to the screen.

Year

The financial aid award year (e.g., 1213). Defaults to the current award year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Print Text Comments screen.

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Refund Check-Fund Screen

The Refund Check-Fund screen enables you to produce a check register report of refund checks for financial aid, sorted by type of aid.

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

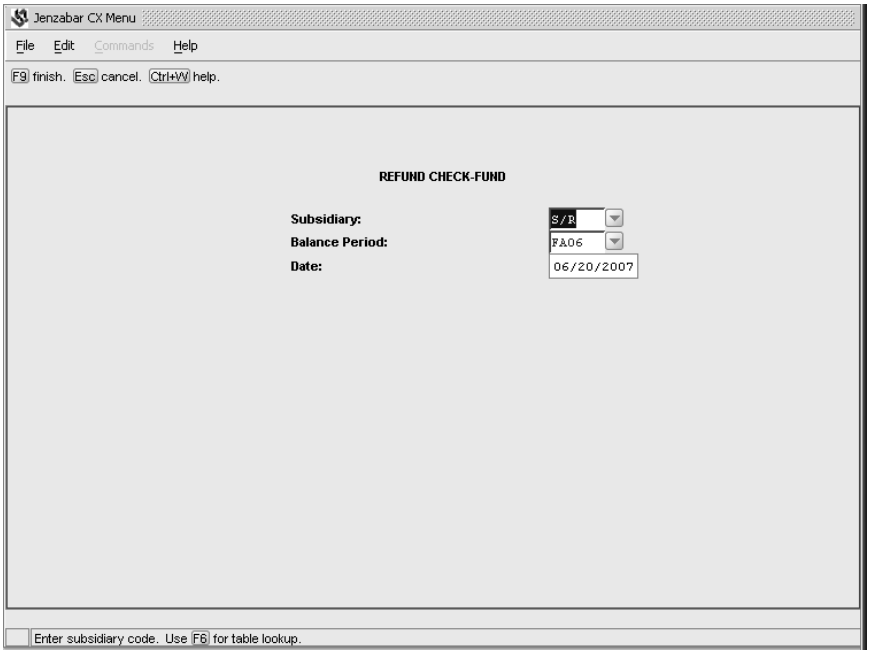
Access

Access the Refund Check-Fund screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports
4. Refund Check-Fund

Example

Following is an example of the Refund Check-Fund screen.



Fields

The following list describes the fields that appear on the Refund Check-Fund screen.

Balance Period

A code identifying the balance period (e.g., FA09) to be considered for the report. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Date

The date (mm/dd/yyyy) the checks will be run. Defaults to the current date.

Subsidiary

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

Commands

The following lists the commands you can execute from the Refund Check-Fund screen.

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Refund Check-Student Screen

The Refund Check-Student screen enables you to produce a check register report of refund checks for financial aid, sorted by ID number.

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

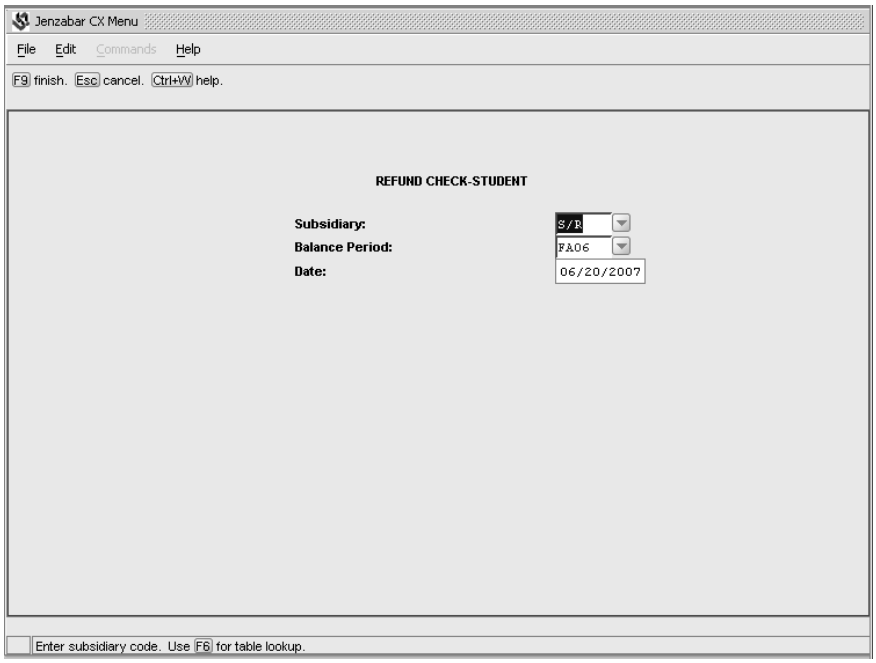
Access

Access the Refund Check-Student screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports
4. Refund Check-Student

Example

Following is an example of the Refund Check-Student screen.



Fields

The following list describes the fields that appear on the Refund Check-Student Report screen.

Balance Period
A code identifying the balance period (e.g., FA09) to be considered for the report. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Date
The date (mm/dd/yyyy) the checks will be run. Defaults to the current date.

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

Commands

The following lists the commands you can execute from the Refund Check-Student screen.

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

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

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

Help
Displays help information about the associated screen or process.

Refund Eligible-Fund Screen

The Refund Eligible-Fund screen enables you to produce the Expected Refund Proof List report listing all eligible refundable aid checks for the specified tickler and contact, sorted by the type of aid.

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

Access

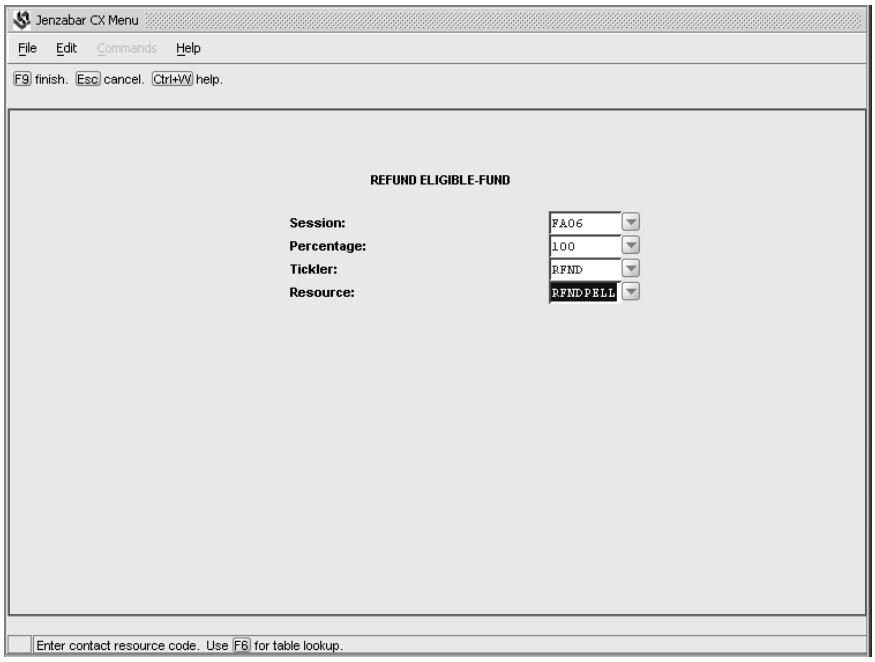
Access the Refund Eligible-Fund screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports

4. Refund Eligible-Fund

Example

Following is an example of the Refund Eligible-Fund screen.



Fields

The following list describes the fields that appear on the Refund Eligible-Fund screen.

Percentage

The percentage of excess financial aid to be refunded which you want to reflect on the report. Defaults to 100.

Resource

A code identifying the refund contact the system added to the students' records so they can receive refund checks. Use **Table Lookup** for a list of valid codes.

Session

The session (e.g., FA09) for which the refund contact was added. Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Tickler

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

Commands

The following lists the commands you can execute from the Refund Eligible-Fund screen.

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Refund Eligible-Student Screen

The Refund Eligible-Student screen enables you to produce Expected Refund Proof List report listing all eligible refundable aid checks for the specified tickler and contact, sorted by the ID number.

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

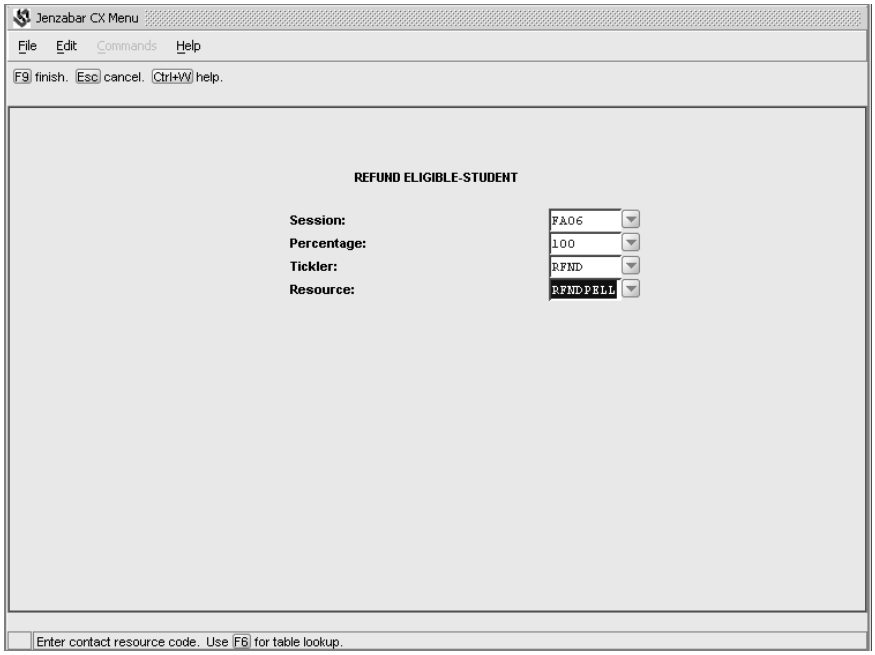
Access

Access the Refund Eligible-Student screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Reports
4. Refund Eligible-Student

Example

Following is an example of the Refund Eligible-Student screen.



Fields

The following list describes the fields that appear on the Refund Eligible-Student screen.

Percentage

The percentage of excess financial aid to be refunded which you want to reflect on the report. Defaults to 100.

Resource

A code identifying the refund contact the system added to the students' records so they can receive refund checks. Use **Table Lookup** for a list of valid codes.

Session

The session (e.g., FA09) for which the refund contact was added. Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Tickler

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

Commands

The following lists the commands you can execute from the Refund Eligible-Student screen.

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Refunds Screen

The Refunds screen enables you to view a student's refundable financial aid amounts and to interactively move refundable financial aid from the Student Accounts (S/A) to the Student Refunds (S/R) prior to processing a refund check. This enables you to process a specific student's refund amount rather than use the batch refund processes. The system also displays any checks processed from refundable financial aid.

Note A student's refundable aid must be posted/disbursed before you use this screen. Your institution must also use the Fee Collection product in the Business office.

Access

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

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

1. Enter the desired student ID or Social Security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Select **Disbursed**.
3. Select **Refund**.

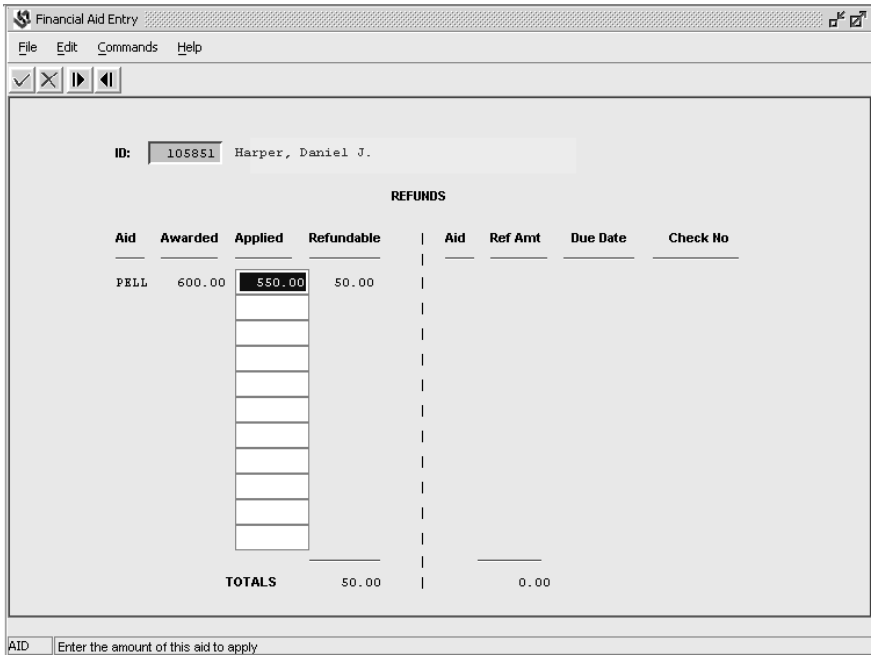
Refundable Aid Processes

You can use the Refunds screen only if your institution uses the processes on the Refundable Aid menu. If your institution's financial aid program allows excess funds to be given to students, your institution may decide to use the Refundable Aid processes instead of the voucher transaction and check production processes to produce checks for overages/credit.

Note Specific ENABLE macros must be enabled to use this screen and the associated procedures.

Example

Following is an example of the Refunds screen.



Fields

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

Note The fields on the right side of the screen reflect the amount of refundable financial aid the student has already received or is scheduled to receive.

Aid

A code identifying the aid type (e.g., PELL) that can be refunded, is scheduled, or has been received by the student.

Applied

The dollar amount of the aid already used by the student (e.g., 1182.50). This value includes any charges (e.g., parking fees, activity fees, etc.).

Awarded

The total dollar amount of aid awarded to the student (e.g., 1575.00).

Check No

The number of the check written for the student, if applicable. The system enters this information after checks have been written.

Note The student can have multiple refund amounts for one check; therefore, this number can be duplicated for multiple Aid codes.

Due Date

The date (mm/dd/yyyy) the refund check is due to be or was written for the student, if applicable.

ID

The system-generated number identifying the student in the database (e.g., 1266960). The student's name appears to the right. This is a display-only field.

Ref Amt

The dollar amount of aid being refunded to the student (772.50), if applicable. The system enters this value.

Refundable

The maximum dollar amount of the aid that can be refunded to the student (e.g., 392.50) calculated using the formula: Awarded less Applied.

Totals

The total dollar amount of all aid that can be refunded to the student (e.g., 3482.50), and the total dollar amount of all aid that is due to be or has been refunded to the student, if applicable (e.g., 3907.50).

Commands

The following lists the commands you can execute from the Refunds screen.

Back

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

Cancel

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

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

Finish

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

Forward

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

Split

Accesses the Split Payment window enabling you to schedule multiple payments to be made the student on different dates for the same refund.

Switch Sides

Enables you to access some of the fields on the right side of the screen.

Refund-Contacts Screen

The Refund-Contacts screen enables you to add a refund contact for students who should receive a refund check. This is the first step in the process to refund financial aid using contacts. This process also runs the Batch Fee Calculation for all students who receive a contact.

Note Specific ENABLE macros must be enabled to use this screen and the associated procedures. This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

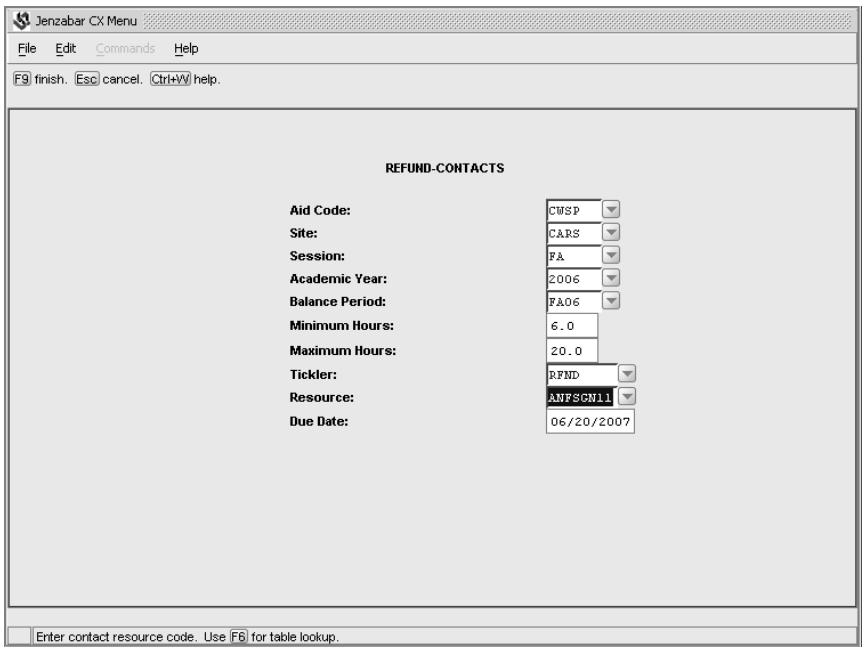
Access the Refund-Contacts screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Refundable Aid
3. Refund-Contacts

Note The screen is available only if the Refund by Contact macro (ENABLE_FEAT_RFND_CTC) is enabled. If this does not appear on your menu, contact your Jenzabar coordinator.

Example

Following is an example of the Refund-Contacts screen.



Fields

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

Academic Year

The calendar year (yyyy) for which you are adding the refund contact. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Aid Code

A code identifying the type of aid (e.g., PELL) for which you are adding the refund contact. Use **Table Lookup** for a list of valid codes.

Balance Period

A code identifying the balance period (e.g., FA09) for which you are adding the refund contact. Defaults to the current balance period. Use **Table Lookup** for a list of valid codes.

Due Date

The due date (mm/dd/yyyy) for the refund contact. Defaults to the current date.

Maximum Hours

The maximum number of hours in which a student must be enrolled to have the refund contact added to his/her record. Defaults to 20.0.

Minimum Hours

The minimum number of hours in which a student must be enrolled to have the refund contact added to his/her record. Defaults to 6.0.

Resource

A code identifying the refund contact you want to add to the students' records so they can receive refund checks. Use **Table Lookup** for a list of valid codes.

Note You must enter the same contact and tickler for each disbursement with the same aid, site (if applicable), session, year, and refund percentage.

Session

The session in which the students who should receive the refund contact are enrolled. Defaults to FA (fall). Use **Table Lookup** for a list of valid sessions.

Site

The location where the students who should receive the refund contact attends classes. Use **Table Lookup** for a list of valid sites.

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

Tickler

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

Commands

The following lists the commands you can execute from the Refund-Contacts screen.

Cancel

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

- Backs out of the current command

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

Finish

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

Help

Displays help information about the associated screen or process.

Refund-ID Screen

The Refund-ID screen enables you to refund unused financial aid for the ID number you specify or for all qualifying ID numbers. This is the first step in the process to refund financial aid using ID numbers. This process also runs the Batch Fee Calculation for the ID number you specify or for all qualifying ID numbers.

Note Specific ENABLE macros must be enabled to use this screen and the associated procedures. This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

Access

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

1. Student Processing
2. Refundable Aid
3. Refund-ID

Note The screen is only available if the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) is enabled. If this does not appear on your menu, contact your Jenzabar coordinator.

Example

Following is an example of the Refund-ID screen.

Fields

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

Academic Year

The calendar year (yyyy) for which you are refunding aid. Defaults to the current year. Use **Table Lookup** for a list of valid years.

ID#

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

Program

The academic program to which the students who are to receive a refund belong. Defaults to UNDG (undergraduate). Use **Table Lookup** for a list of valid programs.

Session

The session in which the students who are to receive a refund are enrolled. Defaults to FA (fall). Use **Table Lookup** for a list of valid sessions.

Commands

The following lists the commands you can execute from the Refund-ID screen.

Cancel

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

- Backs out of the current command

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

Finish

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

Help

Displays help information about the associated screen or process.

SAP Action Process Screen

The SAP Action Process screen enables the system to perform the following actions for each student who does not meet SAP (Satisfactory Academic Progress). This process can be run for up to four sessions.

1. Selects those students who have a SAP action contact with an expected status.
2. Performs actions on the students based on values in the Financial SAP Action table (fasapact_table).
3. Updates the contact status to completed.

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

Actions taken can include holding certain aid, creating letters, or notifying advisors. Creating letters and notifying advisors is simplified by creating contacts for the appropriate letter or reports, which you can produce for those students who have the contact(s).

Note For more information about using contacts to create letters and to notify advisors, see the *Communications Management User Guide*.

Access

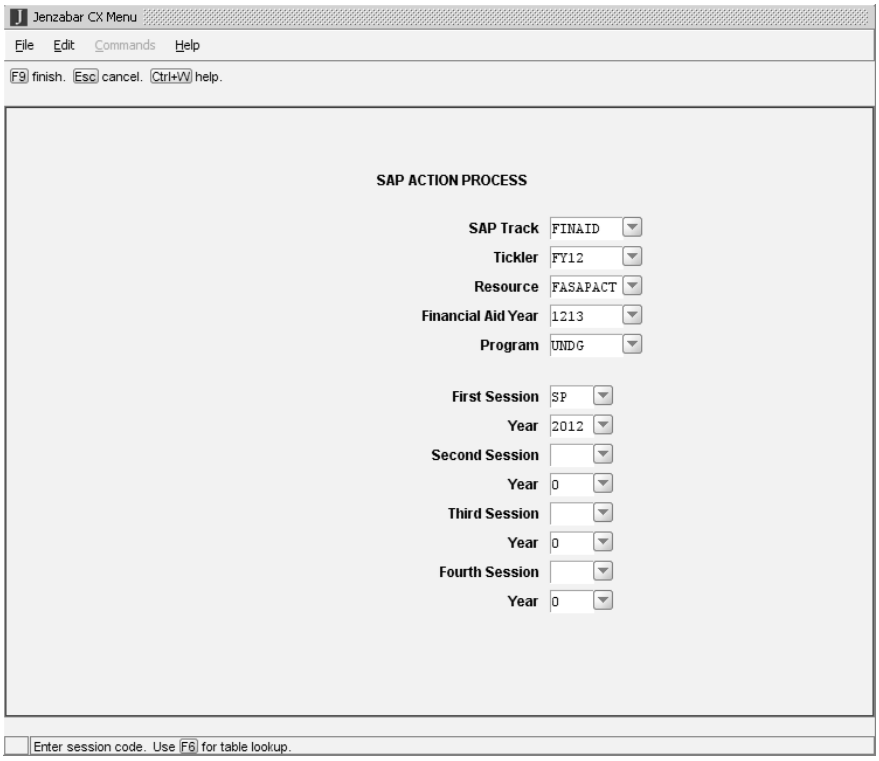
Access the SAP Action Process screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. SAP Action Process

Note SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the SAP Action Process screen.



Fields

The following list describes the fields that appear on the SAP Action Process screen.

Financial Aid Year

The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

First Session

The first session in which aid has been awarded that you want to process. Defaults to the next session. Use **Table Lookup** for list of valid sessions.

Note If you want the process to update the aid statuses for more sessions, use the Second Session – Fourth Session fields as needed.

Fourth Session

The fourth session in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Resource

A code identifying the SAP action contact with an expected status. The system uses this contact to perform the necessary action on students requiring action. Use **Table Lookup** for a list of valid codes.

Program

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

SAP Track

A code identifying the SAP track to which the SAP action contact belongs (e.g., FINAID for the Financial Aid track). Use **Table Lookup** for a list of valid codes.

Second Session
The second session in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Third Session
The third session in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Tickler
A code identifying the Tickler to which the SAP action contact is associated. Defaults to the current year's Tickler. Use **Table Lookup** for a list of valid codes.

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

Commands

The following lists the commands you can execute from the SAP Action Process screen.

Cancel
Does not save any of the field entries you have made and exits from the current screen.

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

Help
Displays help information about the associated screen or process.

SAP Compliance Process Screen

The SAP Compliance Process screen produces a printed report. It enables the system to perform the following actions for students selected for SAP (Satisfactory Academic Progress) compliance:

1. Updates the SAP contact status to completed.
2. Creates a SAP action contact with an expected status for each student requiring action.
3. Updates the SAP and Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen. For more information, see the *Financial Aid Need Analysis User Guide*.

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

Access

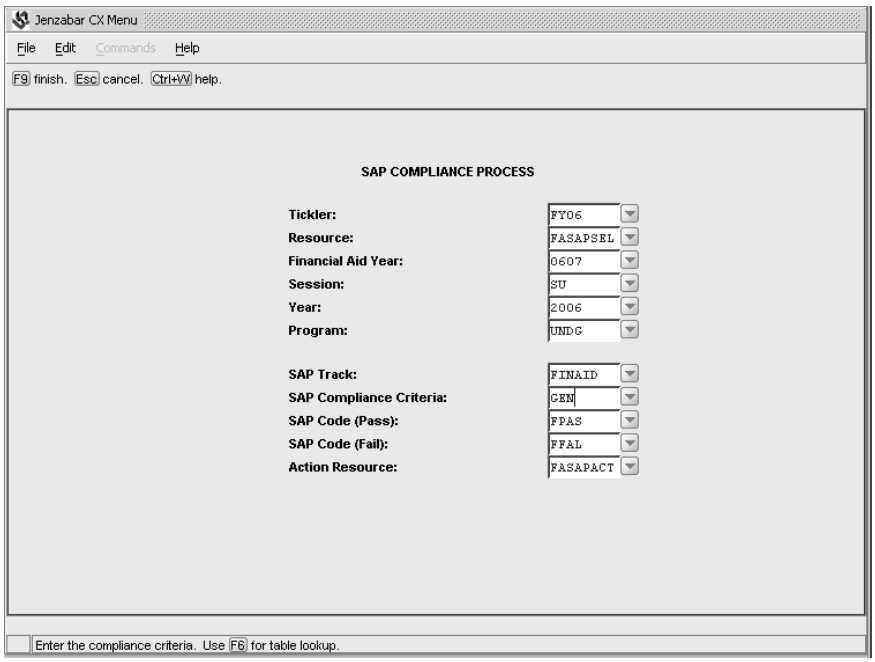
Access the SAP Compliance Process screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. SAP Compliance Process

Note SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the SAP Compliance Process screen.



Fields

The following list describes the fields that appear on the SAP Compliance Process screen.

Action Resource

A code identifying the SAP action contact that the system adds to the contact records of those students requiring action.

Financial Aid Year

The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Program

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

Resource

A code identifying the SAP contact with an Expected status. The system uses this contact to run compliance criteria on students selected for SAP. Use **Table Lookup** for a list of valid codes.

Note Jenzabar recommends you use a contact similar to the name of the track of compliance you intend to use (e.g., GENERAL or SCHOLAR for the general financial aid group or the scholarship group).

SAP Code (Fail)

A code identifying the SAP status if a student fails the compliance criteria. Defaults to FISAP. The system enters this code in the SAP and/or Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen when this process is run. Use **Table Lookup** for a list of valid codes.

SAP Code (Pass)

A code identifying the SAP status if a student passes the compliance criteria. Defaults to PSAP. The system enters this code in the SAP and/or Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen when this process is run. Use **Table Lookup** for a list of valid codes.

SAP Compliance Criteria

A code identifying the criteria against which the selected students are checked. Use **Table Lookup** for a list of valid codes.

SAP Track

A code identifying the SAP track to which the SAP and SAP action contacts belong (e.g., FINAID for the Financial Aid track). Use **Table Lookup** for a list of valid codes.

Session

The session in which aid has been awarded that you want to process. Defaults to the previous session. Use **Table Lookup** for list of valid sessions.

Tickler

A code identifying the Tickler to which the SAP and SAP action contacts are associated. Defaults to the current year's Tickler. Use **Table Lookup** for a list of valid codes.

Year

The calendar year (yyyy) associated with the session that you want to process. Use **Table Lookup** for list of valid years.

Commands

The following lists the commands you can execute from the SAP Compliance Process screen.

Cancel

Does not save any of the field entries you have made and exits from the current screen.

Finish

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

Help

Displays help information about the associated screen or process.

SAP Listing Screen

The SAP Listing screen enables you to create a list of students who have the specified SAP status code. You can use this list to verify students' SAP statuses.

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

Access

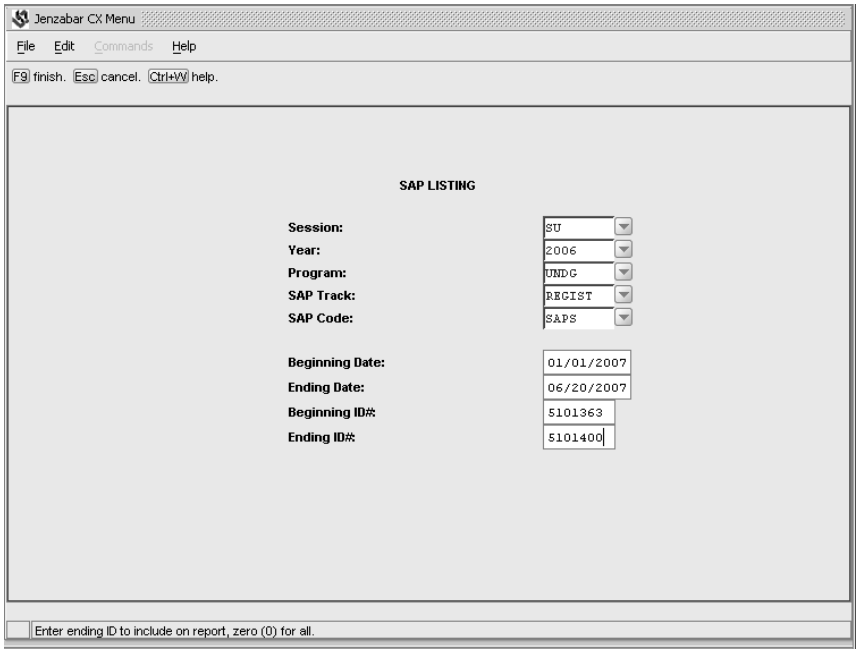
Access the SAP Listing screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. SAP Listing

Note SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the SAP Listing screen.



Fields

The following list describes the fields that appear on the SAP Listing screen.

Beginning Date

The earliest date (mm/dd/yyyy) for which you want the indicated SAP status to be reported, or leave blank to report on all dates. Students whose SAP status changed or was added on or after this date and whose SAP status matches the status specified in the SAP code field will be included in the list.

Beginning ID#

The first (lowest) ID number for which you want the indicated SAP status reported. To report on one student only, enter the same ID number in this field and in the Ending ID# field, or enter zero (0) to report on all students.

Ending Date

The latest date (mm/dd/yyyy) for which you want the indicated SAP status to be reported, or leave blank to report on all dates. Students whose SAP status changed or was added on or before this date and whose SAP status matches the status specified in the SAP code field will be included in the list.

Ending ID#

The last (highest) ID number for which you want the indicated SAP status reported. To report on one student only, enter the same ID number in this field and in the Beginning ID# field, or enter zero (0) to report on all students.

Program

A code identifying the program (e.g., UNDG for undergraduate) that you want to process for the list, or leave blank to report on all programs.

SAP Code

A code identifying the SAP status for which you want to search (e.g., FAIL for Failed SAP), or leave blank to search for all statuses. Use **Table Lookup** for a list of valid codes.

Note If you run the report after the SAP Compliance process to determine which students passed or failed the criteria you passed, make sure you use the same pass/fail codes you used in the Compliance process.

SAP Track

A code identifying the SAP track for which you want to search (e.g., FINAID for the Financial Aid track), or leave blank to report on all tracks. Use **Table Lookup** for a list of valid codes.

Session

The session that you want to process for the list. Defaults to the previous session. Use **Table Lookup** for list of valid sessions.

Year

The calendar year (yyyy) associated with the specified session that you want to process. Defaults to the current year. Use **Table Lookup** for list of valid years.

Commands

The following lists the commands you can execute from the SAP Listing screen.

Cancel

Does not save any of the field entries you have made and exits from the current screen.

Finish

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

Help

Displays help information about the associated screen or process.

Select Award Notices Screen

The Select Award Notices screen enables the system to select and format award notification forms for batch printing. You can include a maximum of four sessions on the same form.

Note You must run this process before you run the Print Award Notices process. This process results in an Output Parameters and Scheduling window. For more information, see the *Output Parameters and Scheduling Window* in this section.

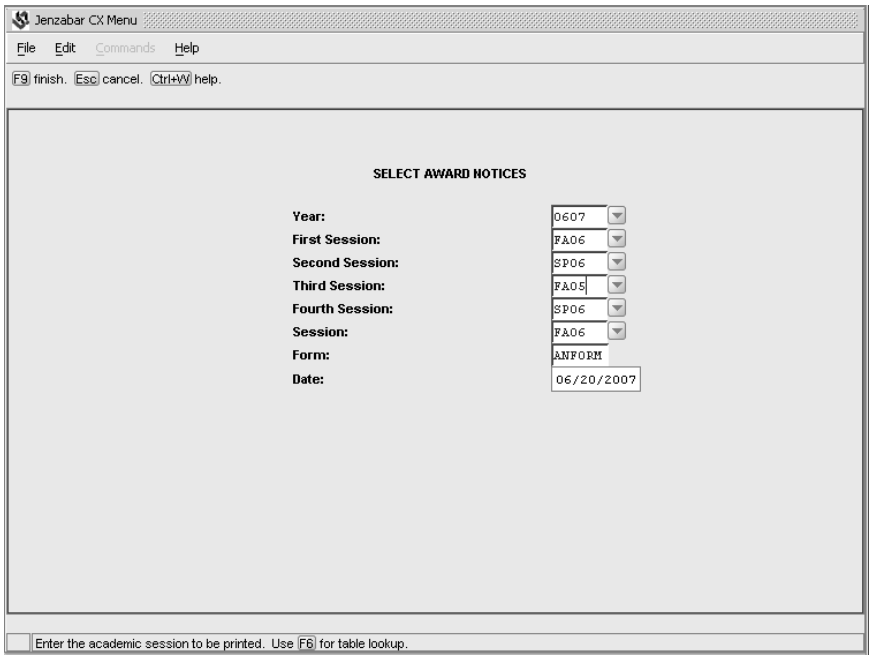
Access

Access the Select Award Notices screen by selecting the following, beginning at the Financial Aid Main: Student Processing menu:

1. Award/Cover Letters
2. Award Notices

Example

Following is an example of the Select Award Notices screen.



Fields

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

Note The sessions are printed on the award notification form in the order that you enter them.

Date

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

First Session

The first award session (e.g., FA09) to be included on the award notification form. Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Form

A code identifying the award notification form (e.g., ANFORM) to use.

Fourth Session

The fourth award session to be included on the award notification form. Use **Table Lookup** for a list of valid sessions, or leave blank.

Second Session

The second award session to be included on the award notification form. Use **Table Lookup** for a list of valid sessions, or leave blank.

Session

The current session (e.g., FA09). Defaults to the current session. Use **Table Lookup** for a list of valid sessions.

Third Session

The third award session to be included on the award notification form. Use **Table Lookup** for a list of valid sessions, or leave blank.

Year

The financial aid award year in which aid has been awarded that you want to consider for the process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Create Cover Letters screen.

Cancel

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

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

Finish

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

Help

Displays help information about the associated screen or process.

Select FA Awarded SAP IDs Screen

The Select FA Awarded SAP IDs screen enables the system to select the students whom you want to process for SAP (Satisfactory Academic Progress). When you run this process, the system selects those students who have been awarded aid and who require checking for pass/fail academic progress requirements. The sessions passed identify all those the system will check for awarded aid that is used for SAP processing. The process creates a SAP contact with an expected status for all selected students.

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

Access

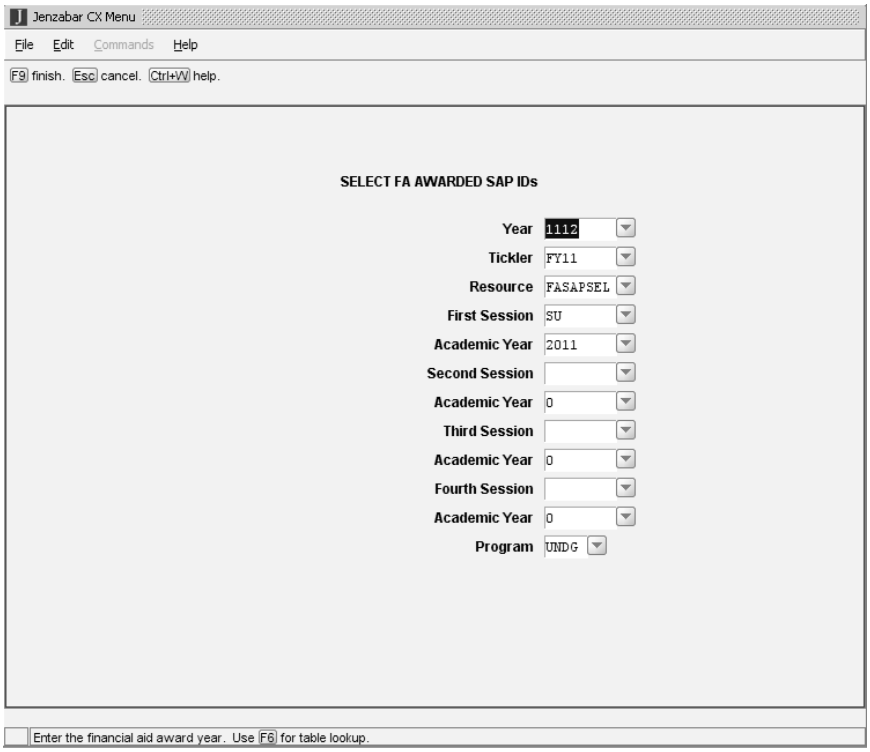
Access the Select FA Awarded SAP IDs screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. Select FA Awarded SAP IDs

Note SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the Select FA Awarded SAP IDs screen.



Fields

The following list describes the fields that appear on the Select FA Awarded SAP IDs screen.

Academic Year (all fields)

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

First Session

The first session for the year in which aid has been awarded that you want to process. Defaults to the previous session. Use **Table Lookup** for list of valid sessions.

Fourth Session

The fourth session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Program

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

Resource

A code identifying the SAP contact the system will add to the selected students' contact records.

Second Session

The second session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Third Session

The third session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Tickler

A code identifying the Tickler to which the SAP contact is associated. Defaults to the current year's Tickler. Use **Table Lookup** for a list of valid codes.

Year

The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Select FA SAP IDs screen.

Cancel

Does not save any of the field entries you have made and exits from the current screen.

Finish

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

Help

Displays help information about the associated screen or process.

Select FA Unawarded SAP IDs Screen

The Select FA Unawarded SAP IDs screen enables the system to select the students whom you want to process for SAP (Satisfactory Academic Progress). When you run this process, the system selects those students who have been applied for aid but not awarded any and who require checking for pass/fail academic progress requirements. The sessions passed identify all those that have not received aid. The process creates a SAP contact with an expected status for all selected students.

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

Access

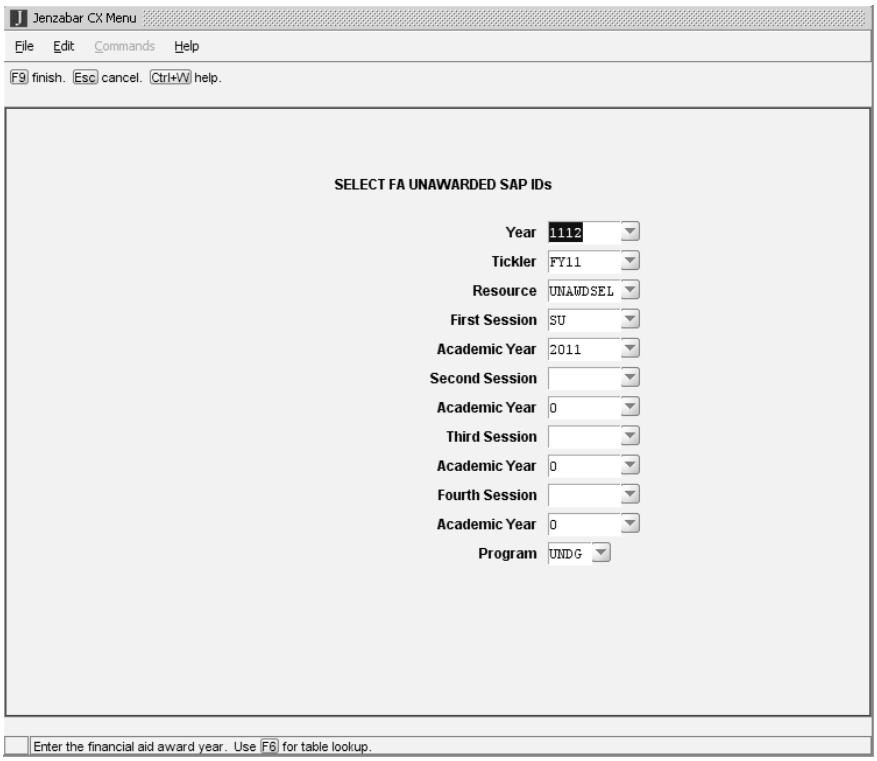
Access the Select FA Unawarded SAP IDs screen by selecting the following, beginning at the Financial Aid: Student Processing menu:

1. SAP Processing
2. Select FA Unawarded SAP IDs

Note SAP Processing is only available if the Financial Aid SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Example

Following is an example of the Select FA Unawarded SAP IDs screen.



Fields

The following list describes the fields that appear on the Select FA Unawarded SAP IDs screen.

Academic Year (all fields)

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

First Session

The first session for the year in which aid has been awarded that you want to process. Defaults to the previous session. Use **Table Lookup** for list of valid sessions.

Fourth Session

The fourth session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Program

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

Resource

A code identifying the SAP contact the system will add to the selected students' contact records.

Second Session

The second session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Third Session

The third session for the year in which aid has been awarded that you want to process. Use **Table Lookup** for list of valid sessions.

Tickler

A code identifying the Tickler to which the SAP contact is associated. Defaults to the current year's Tickler. Use **Table Lookup** for a list of valid codes.

Year

The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

Commands

The following lists the commands you can execute from the Select FA Unawarded SAP IDs screen.

Cancel

Does not save any of the field entries you have made and exits from the current screen.

Finish

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

Help

Displays help information about the associated screen or process.

Support Services Window

The Support Services window enables you to view, add, update, and/or delete a student's support services information. Support services can include orientation, counseling, and tutoring.

Access

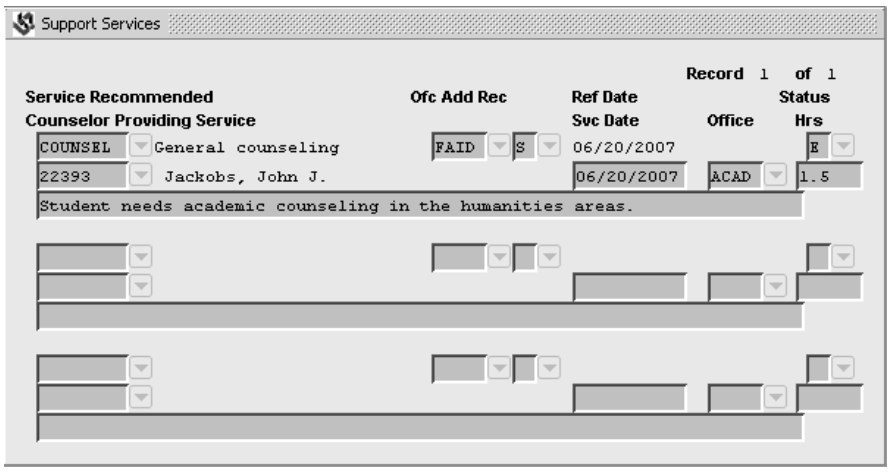
Access the Support Services window by selecting the following, beginning at the Financial Aid Entry screen:

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

1. Enter the desired student ID or Social Security number in the ID field, or perform a query to find the student. Select **Finished**.
2. Scroll Screens
3. Svc-Info

Example

Following is an example of the Support Services window.



Fields

The following list describes the fields that appear on the Support Services window.

(Comment)

This is an unlabeled field located on the third line, below the Counselor Providing Service field. Any comment associated with the support service being recommended or requested.

Counselor Providing Service

The ID number (e.g., 20204) of the individual providing the service. Press <F6> to perform a query. The individual's name appears to the right of the ID number.

Note This value is displayed below the value for Service Recommended.

Hrs

The number of hours spent providing the service (e.g., 4).

Note This value is displayed below the value for Status.

Ofc Add

A code identifying the office making the service referral (e.g., FAID for the Financial Aid office). Use **Table Lookup** for a list of valid values.

Office

A code identifying the office providing the support service (e.g., FAID for the Financial Aid office). Use **Table Lookup** for a list of valid values.

Rec

A code identifying the person(s) who recommended the support service. Valid values are:

- B (Both)
- E (Either)
- S (Student)
- T (Staff)

Ref Date

The date the Support Services record was added (mm/dd/yyyy). This is a display-only field. Defaults to the current date if the record is being added.

Note This value is displayed directly below the Svc Date field name.

Service Recommended

A code identifying the support (e.g., COUNSEL). Use **Table Lookup** for a list of valid codes. The description appears to the right of the code.

Note This value is displayed directly below the Counselor Providing Service field name.

Status

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

- C(ompleted)
- E(xpected)
- R(efused)

Note This value is displayed directly below the Hrs field name.

Svc Date

The date (mm/dd/yyyy) the support service was provided.

Note This value is displayed below the value for Ref Date.

Commands

The following lists the commands you can execute from the screen.

Add

Creates a blank line enabling you to add another record.

Cancel

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

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

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

Delete
Enables you to remove a record.

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

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

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

Update
Enables you to change an existing record.

Update Total Income Screen

The Update Total Income screen enables you to update students' total income if you received an error message after you created FISAP records. You can update the total income for one student, specific students, or for a range by specifying the beginning ID number.

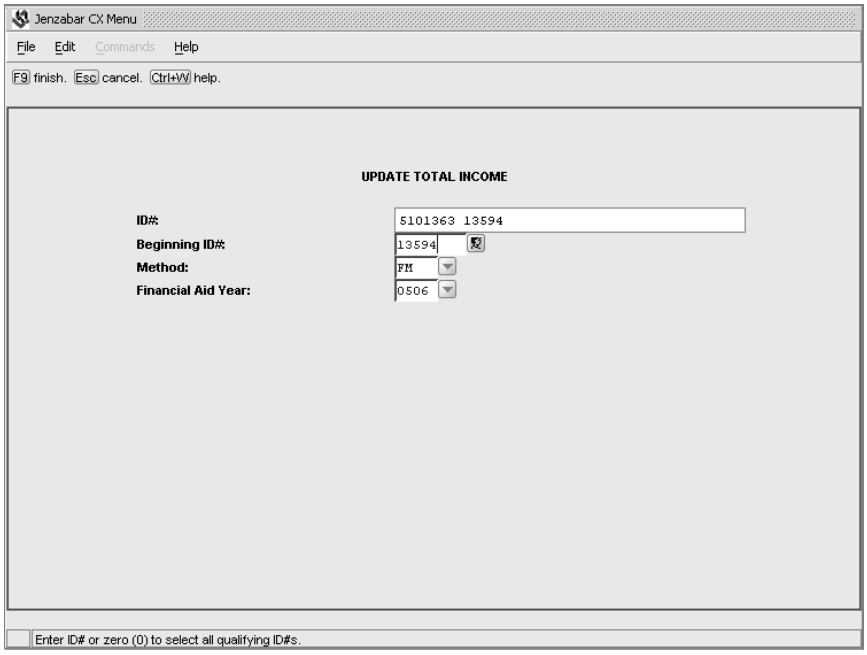
Access

Access the Update Total Income screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Reports
2. FISAP
3. Update Total Income

Example

Following is an example of the Update Total Income screen.



Fields

The following list describes the fields that appear on the Update Total Income screen.

Beginning ID#

The first student's ID number in the range you want to process, or enter **0** (zero) to select all qualifying IDs. Press **<F6>** to perform a query.

Financial Aid Year

The financial aid award year in which aid has been awarded that you want to process. Defaults to the current year. Use **Table Lookup** for a list of valid years.

ID#

The ID number(s) of the student(s) whose total income(s) you want to update.

Method

A code identifying the need analysis methodology that you want to process (e.g., FM). Use **Table Lookup** for a list of valid codes.

Commands

The following lists the commands you can execute from the Update Total Income screen.

Cancel

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

- Backs out of the current command

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

Finish

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

Help

Displays help information about the associated screen or process.

Reports

This section provides:

- The procedure to generate and print reports
- Information about the standard reports you can produce using Financial Aid
- Information about reporting tools

How to Generate and Print Reports

When you select a report from a CX menu, comments on a parameter screen prompt you to enter the following types of parameters:

- Report (e.g., dates, IDs, or document numbers)
- Output (e.g., filenames, printers, dates, and times)

These parameters control the contents of the report and the time and type of output produced.

Follow these steps to generate any of the standard CX reports.

1. Access the desired Reports menu, then select the report you want to generate. A screen containing the processing parameters for the report appears.
2. Enter the required or relevant parameters, then select **Finish**. The Output Parameters and Scheduling window appears.
3. Indicate the type of output you want to produce and the time and day you want to generate the report. Select **Finish** either to generate the report or to schedule it for production on the specified date and time.

Note If you route the output to a file and do not define a name for the file, CX places the output in your home directory in a file called *filename.out*, where *filename* is the technical name of the report. See *Reports for Financial Aid* for the technical name for each report.

For more information about using the Output Parameters and Scheduling window, see *Performing Background Tasks* and *Scheduling Processes* in the *Getting Started User Guide*.

Document Tracking Reports

The following reports relate to Document Tracking. You can produce each of these reports from the Document Tracking: Reports menu.

Contact Status Report By Student

Menu option: Contact Status

Technical name: ctcstatus

Parameters:

Tickler: Optional – The Contact Record Tickler code (e.g., FY11 for the Financial Aid Tickler for 2011-2012).

Program: Optional – The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.

Status: Required – The Contact Selection Status code for which you wish to create the report. Valid codes are:

- A(ll)
- C(ompleted)
- E(xpected)
- V(oid)

First: Required – The Contact code or the beginning of the Contact code range (e.g., AIDAPPIN for aid application received).

Second: Required – The Contact code or the ending of the Contact code range (e.g., WARN for warning letter).

Contact Status Report By Contact Resource

Menu option: Contact Range

Technical name: ctcrange

Parameters:

Tickler: Optional – The Contact Record Tickler code (e.g., FY11 for the Financial Aid Tickler for 2011-2012).

Program: Optional – The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.

Status: Required – The Contact Selection Status code for which you wish to create the report. Valid codes are:

- A(ll)
- C(ompleted)
- E(xpected)
- V(oid)

First: Required – The beginning Contact code (e.g., AIDAPPIN for Aid Application Received) for which you wish to create the report.

Second: Required – The ending Contact code (e.g., PELLPMT for Pell Payment Reporting) for which you wish to create the report.

Description: Lists contacts in name order for a given tickler, program, and status. The report prints out the name for corresponding ID.

Special considerations: None

Note You can also access this report from the Student Processing: SAP Processing menu.

Institutional Verification Contact Status Report

Menu option: Verification

Technical name: pellverify

Parameters:

Tickler: Optional – The Contact Record Tickler code (e.g., FY11 for the Financial Aid Tickler for 2011-2012).

Status: Required – The Contact Selection Status code for which you wish to create the report. Valid codes are:

- A(ll)
- C(ompleted)
- E(xpected)
- V(oid)

Contact: Required – The Contact code (e.g., ACCEPTED for accepted for admission) designating institutional verification.

Program: Optional – The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.

Description: Prints information about students who have completed institutional verification.

Special considerations: None

Outstanding Financial Aid Transcripts

Menu option: Outstanding FA Transcripts

Technical name: transreq

Parameters:

Year: Required – The Financial Aid Award Year code (e.g., 1112 for 2011-2012).

Tickler: Optional – The Contact Record Tickler code (e.g., FY11 for the Financial Aid Tickler for 2011-2012).

Description: Prints all the institution's outstanding or expected Financial Aid transcript requested for each student.

Special considerations: None

Financial Aid Termination Report

Menu option: Package Termination

Technical name: termaid

Parameters:

Tickler: Optional – The Contact Record Tickler code (e.g., FY11 for the Financial Aid Tickler for 2011-2012).

Date: Optional – The Contact Completion date (mm/dd/yyyy).

Description: Prints information about all students who have awards that have been rejected, denied, or nullified.

Special considerations: None

Financial Aid Audit Reports

The Financial Aid Audit reports allow you to maintain an audit trail of all student financial aid data, except the budget item information. Data includes Aid Record, Need Analysis Form, Student Financial Aid, or Financial Aid Need.

You can select each report to include the following data:

- All changes made to all students by all individuals who are making revisions
- Only those changes made to all students by one individual who is making revisions
- All changes made to one student by all individuals who are making revisions
- All changes made to one student by one individual who is making revisions

Note To better maintain your audit trail, Jenzabar recommends you assign each individual making changes a personal User ID rather than using a common User ID. By assigning personal User IDs, you will know the specific individuals making changes to students' information.

You can run each report process on a regular basis by using the Output Parameters and Scheduling window or automatically by using *cron*, a UNIX utility that runs other programs and executes the commands found according to time specifications.

Note For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*. For more information about using *cron*, see the system manuals available for UNIX.

Before You Begin

Before you begin to use the following Financial Aid Audit reports, remember:

- An ID record for the student must already exist on the system
- The user ID number, date and time of change, and a complete copy of each record before and after the change is saved in an audit database

Note For more information about creating an audit database, contact your Jenzabar coordinator.

List of Financial Aid Audit Reports

The following is a list of Financial Aid Audit reports available from the Financial Aid Audit Reports menu. This list includes the following information for each report:

- The title of the report
- The menu option you access to produce the report
- The technical name of the report
- The report parameters
- A brief description of the report

The list is divided according to the menu you use to access the report:

- Financial Aid: Audits Menu
- Financial Aid: Audit Reports Menu
- Reports: Aid Reports Menu
- Reports : Aid Transaction Reports Menu
- Reports: College Work Study Program Menu

Financial Aid: Audits Menu

The following reports relate to Financial Aid Audit. You can produce each of these reports from the Financial Aid: Audits menu:

Financial Aid Update Audit

Menu option: Transaction Audit History

Technical name: stuaudit

Parameters:

Beginning Date: Optional – The beginning date (mm/dd/yyyy).

Ending Date: Optional – The ending date (mm/dd/yyyy).

Description: Reports on the individuals who have updated financial aid records.

Special considerations: None

FA Transcript Aid Verification Report

Menu option: FA Trans Verification

Technical name: chktrans

Parameters: None

Description: Verifies that the Financial Aid table has been set up correctly to print the financial aid transcript.

Special considerations: None

Financial Aid: Audit Reports Menu

The following reports relate to Financial Aid Audit. You can produce each of these reports from the Financial Aid: Audit Reports menu:

Note The Financial Aid Audit reports are only available if the fadata audit macro (ENABLE_FEAT_FADATA_AUDIT) is enabled.

Aid Record Audit Report

Menu option: Aid Record

Technical name: audaid

Parameters:

End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.

Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.

Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.

Update UID: The personal User ID number of the individual(s) who made changes.

Note If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Aid record.

Need Analysis Form Record Audit Report

Menu option: Need Analysis Form

Technical name: audnaf

Parameters:

End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.

Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.

Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.

Update UID: The personal User ID number of the individual(s) who made changes.

Note If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Need Analysis Form record. This report only includes those fields affecting the EFC.

Student Financial Aid Need Record Audit Report

Menu option: Student Financial Aid Need

Technical name: audfaneed

Parameters:

End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.

Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.

Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.

Update UID: The personal User ID number of the individual(s) who made changes.

Note If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Financial Need record.

Student Financial Aid Record Audit Report

Menu option: Student Financial Aid

Technical name: audstufa

Parameters:

End Date: The last date (mm/dd/yyyy) for the audit trail. Defaults to the current date.

Start Date: The first date (mm/dd/yyyy) for the audit trail. You can enter **t** or **today** to enter the current date.

Student ID: The ID number of a specific student whose records were changed, or enter **0** (zero) to include all students.

Update UID: The personal User ID number of the individual(s) who made changes.

Note If you enter a specific User ID number in this field, the report includes only those changes made by that individual. To show all changes made by all individuals making changes, enter **0** (zero) in this field.

Description: Creates a list of any changes to the Student Financial Aid record.

Reports: Aid Reports Menu

The following reports relate to Aid reports. You can produce each of these reports from the Reports: Aid Reports menu:

Financial Aid Offers For (Sess, Yr)

Menu option: Award Offers

Technical name: aidrpt

Parameters:

Year: Required – The school year (e.g., 0811 for 2011-2012) for which you wish to create the report.

First Session: Optional – The first Session code (e.g., FA for Fall) for which you wish to create the report.

Second Session: Optional – The second Session code (e.g., WI for Winter) for which you wish to create the report.

Third Session: Optional – The third Session code (e.g., SP for Spring) for which you wish to create the report.

Description: Lists all students and aid they have been offered for all sessions and their aid statuses.

Special considerations: None

Financial Aid Offers For (School Year) (By Code)

Menu option: Aid by Code

Technical name: aidcoderpt

Parameters:

Year: Required – The school year (e.g., 1112) for which you wish to report aid codes.

Beginning Aid Code: Optional – The beginning financial aid code (e.g., PERK for Perkins loan).

Ending Aid Code: Optional – The ending financial aid code (e.g., STAF for Subsidized Stafford loan).

First Session: Optional – The first session code (e.g., FA for Fall).

Second Session: Optional – The second session code (e.g., WI for Winter).

Third Session: Optional – The third session code (e.g., SP for Spring).

Description: Lists all students and aid they have been offered for all sessions.

Special considerations: None

Financial Aid Offers For (School Year) (Summary Version)

Menu option: Summary Aid by Code

Technical name: sumcoderpt

Parameters:

Year: Required – The school year (e.g., 1112) for which you wish to report aid codes.

First Session: Optional – The first session code (e.g., FA for Fall).

Second Session: Optional – The second session code (e.g., WI for Winter).

Third Session: Optional – The third session code (e.g., SP for Spring).

Description: Lists a summary of financial aid, sorted by aid code.

Special considerations: None

Campus Vs. Non-Campus Based Aid For (School Year)

Menu option: Aid by Funding Source

Technical name: aidcampus

Parameters:

Year: Required – The school year (e.g., 1112) for which you wish to report aid codes.

Method: Required – The code for the financial aid methodology (e.g., FM for Federal Methodology).

Need: Optional – A code indicating whether you wish to display the percentage (P) of the unmet need or the actual dollars (N) of the unmet need.

Need: Optional – Enter the beginning value for percentages on dollar needs.

Need: Optional – Enter the ending value for percentages on dollar needs.

Description: Lists all students and the aid they have been offered for all sessions sorted by Campus-Based vs. Non-Campus Based and within 1 of 3 categories:

- Jobs
- Grants
- Loans

Special considerations: None

Changes In Registration

Menu option: Changes In Registration

Technical name: regchg

Parameters:

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Subsession: Optional – The Subsession code (e.g., F1 for Fall Subsession One) for which you wish to create the report.

Academic Year: Optional – The school year (yyyy) for which you wish to create the report.

Program: Optional – The Program code (e.g., UNDG for undergraduate) for which you wish to create the report.

Subprogram: Optional – The Subprogram code (e.g., CAMP for Main Campus) for which you wish to create the report.

Status: Optional – The Student Academic Status code for which you wish to create the report.

Beginning Date: Optional – The beginning date (mm/dd/yyyy) for which you wish to display changes in registration.

Ending Date: Optional – The ending date (mm/dd/yyyy) for which you wish to display changes in registration.

Description: Lists registration changes as of a specific date.

Special considerations: None

Financial Aid Offers To No Shows For (Sess, Yr)

Menu option: Aid For No-Shows

Technical name: aidnoshow

Parameters:

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Year: Required – The school year (yyyy) for which you wish to create the report.

Description: Lists aid awarded to no-show students.

Special considerations: None

Financial Aid Offers To Part-time Students

Menu option: Aid For Part-time Students

Technical name: parttime

Parameters:

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Academic Year: Optional – The school year (yyyy) for which you wish to create the report.

Hours: Optional – The total amount of hours used to consider a student as attending your institution parttime.

Description: Lists students who are part-time and receiving aid.

Special considerations: None

Financial Aid Student Bridge Course Report

Menu option: Bridge Enrollment

Technical name: fabridge

Parameters:

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Academic Year: Optional – The school year (yyyy) for which you wish to create the report.

Program: Optional – The Program code (e.g., UNDG for undergraduate) for which you wish to create the report.

Subprogram: Optional – The Subprogram code (e.g., CAMP for Main Campus) for which you wish to create the report.

Status: Optional – The Student Academic Status code for which you wish to create the report.

Description: Prints a biographical form for the id_no specified.

Special considerations: None

Charges Paid For By Financial Aid

Menu option: Charges Paid By Aid

Technical name: aidchg

Parameters:

Balance Period: Required – The Balance Period code (e.g., FA12 for Fall 2012) for which you wish to create the report.

Amount Type: Optional – The Amount Type code (e.g., A for amounts paid) for which you wish to create the report.

Description: Lists the aid amounts that pay for specified charges.

Special considerations: None

Financial Aid Enrollment Verification

Menu option: Enrollment Variance

Technical name: enrvar

Parameters:

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Academic Year: Optional – The year (yyyy) for which you wish to create the report.

Subsidiary: Optional – The Subsidiary code (e.g., A/P for Accounts Payable) for which you wish to create the report.

Balance Period: Required – The Balance Period code (e.g., FA11 for Fall 2011) for which you wish to create the report.

Program: Optional – The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.

Number: Required – The minimum number of hours (e.g., 12) your institution requires for full-time enrollment.

Number: Optional – The number of hours your institution requires for three-quarter-time enrollment.

Number: Optional – The number of hours your institution requires for half-time enrollment.

Description: Lists the aid amounts that pay for specified enrollments.

Special considerations: None

Financial Aid Compliance Audit Report

Menu option: Compliance Audit

Technical name: fae.lypso

Parameters:

Year: Required – The Financial Aid Award Year code (e.g., 1112 for 2011-2012) for which you wish to create the report.

Session: Optional – The Session code(s) (e.g., FA12 for Fall, 2012) for which you wish to create the report. You can enter up to four Session codes.

Program: Optional – The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.

Output: Required – The Printer code for the printer you wish to use to print the report.

Report Type: Required – The Compliance Report Type code (e.g., A for Award) for which you wish to create the report.

Description: This is a background report that audits student financial aid compliance and lists students and their financial aid where compliance is not met.

Special considerations: None

Financial Aid History (By Year)

Menu option: Aid History By Year

Technical name: fahist

Parameters:

ID#: Optional – The ID number of the student for which you wish to create the report.

Description: Lists a financial aid history per fiscal year showing the yearly totals of the awarded and disbursed amounts (act and enc) for an individual student. The report's purpose is to quickly get a history of financial aid on the system for filling out a financial aid transcript.

Special considerations: None

Summary Of Financial Aid

Menu option: Aid History By Code

Technical name: fahistsum

Parameters:

ID#: Optional – The ID number of the student for which you wish to create the report.

Description: Summarizes each financial aid awarded to a student with the disbursed amounts.

Special considerations: None

SAP Listing

Menu option: SAP Listing

Note You can also access the SAP Listing report from the Student Processing: SAP Processing menu.

Technical name: saplist

Parameters:

Session: Required – The Session code (e.g., FA for Fall) for which you wish to create the report.

Year: Required – The year (yyyy) for which you wish to create the report.

Program: Optional – The Program code (e.g., UNDG for Undergraduate) for which you wish to create the report.

SAP Track: Optional – The SAP Track code (e.g., FINAID for financial aid track) for which you wish to create the report.

SAP Code: Optional – The SAP Status code (e.g., APPL for SAP appeal status) for which you wish to create the report.

Beginning Date: Optional – The beginning date (mm/dd/yyyy) for which you wish to create the report.

Ending Date: Optional – The ending date (mm/dd/yyyy) for which you wish to create the report.

Beginning ID#: Optional – The beginning ID number of the students for which you wish to create the report.

Ending ID#: Optional – The ending ID number of the students for which you wish to create the report.

Description: Lists students with a specified SAP status.

Special considerations: None

Reports: Aid Transaction Reports Menu

The following reports relate to Aid Transaction reports. You can produce each of these reports from the Reports: Aid Transaction Reports menu:

Disbursed Amounts Per Student

Menu option: Amounts Paid By Student

Technical name: stufatot

Parameters:

Balance Period: Required – The Balance Period code (e.g., FA11 for Fall 2011) for which you wish to create the report.

Description: Lists all students who have received a specified Financial Aid for a specified period.

Special considerations: None

Transactions Per Student

Menu option: Transactions/Amounts Paid

Technical name: stufatottr

Parameters:

Balance Period: Required – The Balance Period code (e.g., FA11 for Fall 2011) for which you wish to create the report.

Description: Lists all transactions for each student who has received Financial Aid for a specified period.

Special considerations: None

Disbursed Amounts Per Financial Aid Code

Menu option: Amounts Paid By Code

Technical name: codfatot

Parameters:

Balance Period: Required – The Balance Period code (e.g., FA12 for Fall 2012) for which you wish to create the report.

Beginning Aid Code: Optional – the beginning Financial Aid code (e.g., PELL for Pell grant) for which you wish to create the report.

Ending Aid Code: Optional – the ending Financial Aid code (e.g., STAF for Subsidized Stafford Loan) for which you wish to create the report.

Post Code A: Optional – Enter 'A' to include Financial Aid Post codes on the report.

Post Code L: Optional – Enter 'L' to include Loan Post codes on the report.

Post Code Y: Optional – Enter 'Y' to include the Cash/Refunds Post codes on the report.

Post Code N: Optional – Enter 'N' to include the N Post codes on the report.

Description: Lists all students who have received a certain Financial Aid for a certain period.

Special considerations: None

Transactions Per Financial Aid Code

Menu option: Transactions/Paid By Code

Technical name: codfatottr

Parameters:

Balance Period: Required – The Balance Period code (e.g., FA11 for Fall 2011) for which you wish to create the report.

Beginning Aid Code: Optional – the beginning Financial Aid code (e.g., PELL for Pell grant) for which you wish to create the report.

Ending Aid Code: Optional – the ending Financial Aid code (e.g., STAF for Subsidized Stafford Loan) for which you wish to create the report.

Post Code A: Optional – Enter 'A' to include Financial Aid Post codes on the report.

Post Code L: Optional – Enter 'L' to include Loan Post codes on the report.

Post Code Y: Optional – Enter 'Y' to include the Cash/Refunds Post codes on the report.

Post Code N: Optional – Enter 'N' to include the N Post codes on the report.

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

Special considerations: None

Students Owing Refund For Financial Aid

Menu option: Students Owing Refund

Technical name: aidrfnd

Parameters:

Subsidiary: Optional – The Subsidiary code (e.g., S/A for Student Accounts) for which you wish to create the report.

Balance Period: Required – The Balance Period code (e.g., FA11 for Fall 2011) for which you wish to create the report.

Description: Lists the aid amounts that pay for specified refunds.

Special considerations: None

Journal By Entry

Menu option: G/L Journal Reports

Technical name: jrnlent

Parameters:

Beginning Journal Number: Optional – Enter the journal number corresponding the reference code.

Ending Journal Number: Optional – Enter the journal number corresponding the reference code.

Output: Required – The Printer code for the printer you wish to use to print the report.

Description: Lists a specified journal with related entries and transactions.

Special considerations: None

Journal By Subsidiary Entry

Menu option: S/L Journal Reports

Technical name: jrnlslent

Parameters:

Beginning Journal Number: Optional – Enter the journal number corresponding the reference code.

Ending Journal Number: Optional – Enter the journal number corresponding the reference code.

Output: Required – The Printer code for the printer you wish to use to print the report.

Description: Lists subsidiary transactions by journal.

Special considerations: None

Reports: College Work Study Program Menu

The following reports relate to College Work Study reports. You can produce each of these reports from the Reports: College Work Study Program menu:

Student Payrolls/Student Ledger

Menu option: Student Payroll/Ledger

Technical name: prstuldgr

Parameters:

Beginning Date: Optional – The beginning date (mm/dd/yyyy) for which you wish to create the report.

Ending Date: Optional – The ending date (mm/dd/yyyy) for which you wish to create the report.

Fiscal Year: Required – The fiscal year (e.g., 1112 for 2011-2012) for which you wish to create the report.

College Work Study Aid Code: Optional – Enter the College Work Study Aid Code.

Institution Work Study Aid Code: Optional – Enter the Institution Work Study Aid Code.

Description: Prints a Student Payroll Ledger sorted by student.

Special considerations: Report requires wide paper.

Summary of Student Payrolls

Menu option: Student Payrolls – Summary

Technical name: sumstupr

Parameters:

Beginning Date: Optional – The beginning date (mm/dd/yyyy) for which you wish to create the report.

Ending Date: Optional – The ending date (mm/dd/yyyy) for which you wish to create the report.

Description: Prints a Summary of Student Payrolls. The report uses the payroll codes of CWSP and INST.

Special considerations: None

Student Work Study Aid Report

Menu option: Student Work Study Aid

Technical name: wsneedrpt

Parameters:

Subsidiary: Optional – The Subsidiary code (e.g., A/P for Accounts Payable) for which you wish to create the report.

Fiscal Year: Required – The fiscal year (e.g., 1112 for 2011-2012) for which you wish to create the report.

College Work Study Aid Code: Optional – Enter the College Work Study Aid Code.

Institution Work Study Aid Code: Optional – Enter the Institution Work Study Aid Code.

Amount: Optional – Enter the amount awarded.

Description: Prints a Student Work Study Need report. The report prints Total Aid without Work Study plus the Actual Amount Paid for Work Study and only lists students who have been paid aid.

Special considerations: None

FISAP Reports

You can use the FISAP reporting options in CX to gather the necessary data for the Department of Education's annual Fiscal Operations Report and Application to Participate form. The information for the FISAP reports comes primarily from existing data in CX, provided the Financial Aid application has been implemented and the need analysis data has been entered (e.g., the parents' and student's income). The disbursed amounts for the Title IV aid come directly from the Student Accounts (S/A) subsidiary records for all students during the award year. Other information must be entered and validated manually before the FISAP reports can be finalized. This data consists of various flags along with verified data values in the system to note whether the students meet the FISAP reporting requirements.

Before You Begin

Before you can begin using the FISAP reporting options, you must complete the following tasks:

1. Verify the posted financial aid data in the system.
2. Set the FISAP flags and values.
3. Create FISAP records.

Note When you create FISAP records, the system automatically updates students' total incomes. However, if you get an error message when you create FISAP records, you will need to recalculate these. You can do this following the procedure *Updating Students' Total Income* in this section.

4. Verify FISAP data.

Verifying the Posted Financial Aid Data

The first task you must complete before using the FISAP reports is to verify the posted financial aid data. Follow these steps to create the Student Financial Aid Audit report which you use to verify the data.

1. From the Student Management: Financial Aid Main menu, select the menu option Audits. The Financial Aid: Audit menu appears.
2. Select the menu option Audit – With Update. The Audit – With Update screen appears.

Note This option may be password protected. Contact your Jenzabar coordinator if you need help accessing this option.

3. Enter the financial aid award year and the financial packaging method code and select **Finish**. The Output Parameters and Scheduling window appears.

4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: Audit menu reappears.

Note For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.

5. After you create the Student Financial Aid Audit report, resolve any errors from the audit. However, because you ran the Audit – With Update menu option, the system generally updates any error conditions found. For more information about running and interpreting this report, see the section *Financial Aid Auditing* in the *Financial Aid Technical Manual*.

Setting the FISAP Flags and Values

The second task you must complete is setting the FISAP flags and values. To save time and data entry, you can run the Default Initial Values process from the Reports: FISAP Reports menu. This process asks for the minimum hours required for at least full-time status during the year and up to three sessions to check for attendance. If a student was confirmed in any of the sessions passed, the system will set the In Attendance flag to **Y**.

CAUTION

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

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP Reports menu appears.
3. Select the menu option Default Initial Values. The Default Initial Values screen appears.

Note This process will prepare the FISAP data by updating the applicants' financial aid record with default values based on the existing data. You should only run this process once. Running it more often will overwrite updated information.

4. Update the default values in the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
5. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Reports: FISAP Reports menu reappears.

Note

- For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
- If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system runs the process for the parameters you specified. After the system completes the process, it sends you email informing you if it completed successfully.

Creating FISAP Records

The third task you must complete is creating FISAP records (fisap_rec). To do this, run the Create FISAP Records process from the Reports: FISAP Reports menu. The system creates FISAP records using information from the Subsidiary

Total records for all students with financial aid posted for the following programs: Perkins Loan, the Supplemental Educational Opportunity Grant, and the Federal Work Study Program.

The FISAP record contains a program code that should be the same value as the program code in the student's Student Financial Aid record (stufa_rec). If it is not, or if the student has a blank program code in the FISAP record, access the FISAP Data Entry menu option from the Reports: FISAP Reports menu to update or add a FISAP program code.

CAUTION

If you run this process more than once, the system replaces existing FISAP records with new ones for all eligible students or for the specified ID numbers. Consequently, you should not run this process after you manually enter FISAP data.

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP Reports menu appears.
3. Select the menu option Create FISAP Records. The Create FISAP Records screen appears.
4. Update the default values in the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
5. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Reports: FISAP Reports menu reappears.

Note For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.

If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system runs the process for the parameters you specified. After the system completes the process, it sends you email informing you if it completed successfully, including information about what the process did.

Updating Students' Total Income

To produce a valid Fiscal Operations report, all applications on file must have been entered into the Need Analysis Form record (naf_rec). For more information, see the section *Entering Financial Aid Need Analysis Information* in the *Financial Aid Need Analysis User Guide*. The program then uses the appropriate income, dependency status, and zero EFC values to update the stufa_rec.tot_inc, stufa_rec.dep, and stufa_rec.zero_efc respectively.

When you create the FISAP records, the system updates students' total income. However, if you get an error message when you create FISAP records, you will need to recalculate these following this procedure.

Note During the calculation of the total income, the FISAP program may encounter a case where the need analysis is rejected. The student's ID number and the reason why the need analysis was rejected will be printed.

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP menu appears.

3. Select the menu option Update Total Income. The Update Total Income screen appears.
4. Update the default values in the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
5. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Reports: FISAP Reports menu reappears.

Note

- For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
- If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system runs the process for the parameters you specified. After the system completes the process, it sends you email informing you if it completed successfully.

Verifying FISAP Data

The last task you must complete is to set up a series of flags and data values in the FISAP Data Entry screen. The following conditions must be entered and validated for each student before his/her information will appear on FISAP reports:

- The Include in Report field must be set to Y, if the student is to be included in the FISAP report.
- The Program fields must contain either a valid undergraduate or graduate code.
- The Dependent field must be set to either D for dependent or I for independent.
- The Need Entered field must be set to Y, if a valid need analysis of the student has been done.
- The In Attendance field must be set to Y, if the student was not only enrolled in a program but also attended classes during the year.
- The Fulltime field must be set to Y, if the student attended full time or more during the year. This field must be set to N, if the student attended less than full time.
- The Home Site field determines which site a student will be grouped with for reporting purposes. This field must be set to NONE, if the student does not have a home site.

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

If necessary, you can manually update these fields using the following procedure:

1. From the Student Management: Financial Aid Main menu, select the menu option Reports. The Financial Aid: Reports menu appears.
2. Select the menu option FISAP. The Reports: FISAP Reports menu appears.
3. Select the menu option FISAP Data Entry.

4. Select **Finish**. The FISAP Data Entry screen appears.

5. Select **Query** to find the first student whose information you want to verify. After entering some search criteria (e.g., an ID number in the ID No field or Social Security number in the SS No field), press the **<Esc>** key. The system searches the database for any records that match the specified criteria, and if at least one is found, the student's information appears in the fields.

   Please note:

   - The number of records, or rows, found that match the specified criteria appears in the lower left corner of the screen; for example, "1 row(s) found." If more than one was found, use the **Next** and/or **Previous** commands to move to each record.
   - If no records are found, the message "There are no rows satisfying the conditions" appears.

6. Are the fields set to the correct values as defined above?

   - If yes, go to step 10.
   - If no, select the **Detail** command to access the record in which the field(s) you need to update appear. Go to step 7.

   The screen includes information from the ID record (id_rec), the Student Financial Aid record (stufa_rec), the FISAP record (fisap_rec), and the Program Enrollment record (prog_enr_rec). The fields that you might need to update can be in any of these records. You access each record using the **Detail** command; each time you select the command, the record that you have access to changes. The name of the record you are currently accessing appears in the upper right corner of the screen, below the ring menu (e.g., ** 1: id_rec table**).

7. Select **Update**. The cursor moves to the first field in the record that you can update. Update the appropriate field(s). If necessary, press the **<Enter>** or **<Tab>** key to move to the next field.

   The student may have more than one Student Financial Aid record (stufa_rec) depending on the award year. This information appears in the Award Year field on the Student Financial Aid Information segment of the screen. Use the **Next** and/or **Previous** commands to ensure you are updating the correct award year.

8. Press the **<Esc>** key to accept the changes.

9. Do you need to update additional fields in another record (e.g., the Program fields in either the FISAP record or in the Program Enrollment record)?

   - If yes, go to step 6.
   - If no, go to step 10.

10. Do you need to verify another student's information?

    - If yes, go to step 5.
    - If no, select **Exit**, then press **<Enter>**. The Reports: FISAP Reports menu reappears.

Summary of FISAP Reports

FISAP reports are in two different areas:

- Reports: FISAP Reports Menu
- Refundable Aid: Reports Menu

Reports: FISAP Reports Menu

The following is a list of FISAP reports available from the Reports: FISAP Reports menu. Each report only displays records for sites that are the same as the operator's or that have a site of NONE or blank. This list includes the following information for each report:

- The title of the report
- The menu option you access to produce the report
- The technical name of the report
- The report parameters
- A brief description of the report

Note You can run each report process on a regular basis by using the Output Parameters and Scheduling window. For information, see the *Getting Started User Guide*.

Students Without Income or Need Amounts Report

Menu option: No Need/No Income

Technical name: noneedinc

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of students (e.g., 1112 for the 2011-2012 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a list of students with zero income in either the Parent or Student Income fields as well as students who have a financial need of zero, or less than zero.

Students Not in Attendance With Need Records

Menu option: Students Not Attending

Technical name: noattend

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 1112 for the 2011-2012 school year). Use **Table Lookup** for a list of valid options.

First Session: Optional – a code indicating the first session to exclude from the report (e.g., FA for fall). Use **Table Lookup** for a list of valid codes.

Academic Year: Optional – the calendar year of the first session to exclude from the report (e.g., 2011). Use **Table Lookup** for a list of valid options.

Second Session: Optional – a code indicating the second session to exclude from the report (e.g., SP for spring). use **Table Lookup** for a list of valid codes.

Academic Year: Optional – the calendar year of the second session to exclude from the report (e.g., 2011). Use **Table Lookup** for a list of valid options.

Third Session: Optional – a code indicating the third session to exclude from the report (e.g., SU for Summer session). use **Table Lookup** for a list of valid codes.

Academic Year: Optional – the calendar year of the third session to exclude from the report (e.g., 2011). Use **Table Lookup** for a list of valid options.

Description: Creates a list of students who were not in attendance or not confirmed in any of the sessions entered as parameters during the reporting year. You can use this report to set the FISAP In Attendance flag value. The report will list all previously attended sessions for each student selected.

FISAP Data Audit Report

Creates a list of students who are missing at least one of the required FISAP record fields or FISAP required data for all students.

Menu option: FISAP Data Audit

Technical name: fisapau

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 1112 for the 2011-2012 school year). Use **Table Lookup** for a list of valid options.

Students: Required – A code indicating whether to print only students with missing data (N) or to print all students.

Description: Creates a list of students who are missing at least one of the required FISAP record fields or FISAP required data for all students.

Dependent Eligible Aid Applicants for Award Year 9*X*9*Y* Report

Menu option: Dep. Eligible for Aid

Technical name: eligdep

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 1112 for the 2011-2012 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a list of dependent students in each program who are eligible for aid.

Independent Eligible Aid Applicants for Award Year 9*X*9*Y*

Menu option: Indep. Eligible for Aid

Technical name: eligindep

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 1112 for the 2011-2012 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a list of independent students in each program who are eligible for aid.

Test for FISAP Eligible Aid Report: Award Year 9*X*9*Y*

Menu option: Eligible for Aid – Detail

Technical name: testelig

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of students (e.g., 1112 for the 2011-2012 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a detailed list of students who appear on the Dependent Eligible Aid Applicants for Award year 9*X*9*Y* and/or the Independent Eligible Aid Applicants for Award Year 9*X*9*Y*. You can use this list to cross-reference the other two.

Fiscal Operations Report for 9*X*9*Y*

Menu option: FISAP Report Grid

Technical name: fisaptot

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 1112 for the 2011-2012 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a grid showing the amounts disbursed for each aid type required with breakdowns for income and program. The report includes students who meet the following conditions:

- Have a Student Financial Aid record for the reporting year
- Have the Need Entered and the In Attendance flags set to Y
- Have the Dependent flag set to D for dependent or I for independent

Test for FISAP Reports: Award Year 9*X*9*Y*

Menu option: FISAP Report – Detail

Technical name: testtot

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of students (e.g., 1112 for the 2011 to 2012 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a detailed list of students who appear on the Fiscal Operations Report for 9*X*9*Y*. The list shows the students' incomes and aid totals. You can use this list to cross-reference the other.

Fiscal Operations Audit Report for 9*X*9*Y*

Menu option: Missing Data Audit

Technical name: totaudit

Parameters:

Year: Required – A code indicating the financial aid award year the report should use to create the list of dependent students (e.g., 1112 for the 2011 to 2012 school year). Use **Table Lookup** for a list of valid options.

Description: Creates a list of students who are not included in the FISAP report. This report lists any students with missing records or FISAP flag values that keep the student from being included in the FISAP report.

Refundable Aid: Reports Menu

The following reports relate to Refundable Aid reports. You can produce each of these reports from the Refundable Aid: Reports menu.

Student Financial Aid Need Record Audit Report

Menu option: Enrollment Variance-Fund

Technical name: enraid

Parameters:

Site: Optional – The Site code (e.g., MAIN for main campus)

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Year: Optional – The school year (e.g., 1112) for which you wish to create the report.

Subsession: Optional – The first Subsession code (e.g., F1 for Fall Subsession One) for which you wish to create the report.

Subsession: Optional – The second Subsession code (e.g., F2 for Fall Subsession Two) for which you wish to create the report.

Program: Optional – Enter the Program code (e.g., UNDG for undergraduate) for which you wish to create the report.

Minimum Hours: Optional – Enter the minimum number of enrolled hours to list this student on the report.

Maximum Hours: Optional – Enter the maximum number of enrolled hours to list this student on the report.

Financial Aid Code: Optional – Enter the first Financial Aid Code (e.g., PELL for PELL awards).

Financial Aid Code: Optional – Enter the second Financial Aid Code (e.g., STAF for Subsidized Stafford Loan).

Financial Aid Code: Optional – Enter the third Financial Aid Code (e.g., SEOG for Supplemental Education Opportunity Grant).

Description: Prints enrollment verification lists for students.

Special considerations: None

Refund Eligible-Fund

Menu option: Refund Eligible-Fund

Technical name: rfnd.aid

Parameters:

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Percent: Optional – Enter the disbursement percentage.

Tickler: Optional – Enter the Tickler code.

Contact Resource: Optional – Enter the Contact Resource code.

Description: Produces a proof list of students with a refund due to be processed in the next check run.

Special considerations: None

Expected Refund Proof List

Menu option: Refund Eligible-Student

Technical name: rfnd.id

Parameters:

Session: Optional – The Session code (e.g., FA for Fall) for which you wish to create the report.

Percent: Optional – Enter the disbursement percentage.

Tickler: Optional – Enter the Tickler code.

Contact Resource: Optional – Enter the Contact Resource code.

Description: Reports eligible, refundable aid checks for the Tickler and Resource codes that you specify in ID number order.

Special considerations: None

Refund Check-Fund

Menu option: Refund Check-Fund

Technical name: sturfndaid

Parameters:

Subsidiary: Required – Enter the Subsidiary code (e.g., S/R Student Refunds) that you wish to use to run the report.

Balance Period: Required – Enter the Balance Period code (e.g., FA11 for Fall 2011) to be considered for the report.

Date: Required – Enter the date (mm/dd/yyyy) you wish to run the checks.

Description: Produces a check register report of refund checks for financial aid, sorted by type of aid.

Special considerations: None

Refund Checks To Be Disbursed

Menu option: Refund Check-Student

Technical name: sturfnd.id

Parameters:

Subsidiary: Required – Enter the Subsidiary code (e.g., S/R Student Refunds) that you wish to use to run the report.

Balance Period: Required – Enter the Balance Period code (e.g., FA11 for Fall 2011) to be considered for the report.

Date: Required – Enter the date (mm/dd/yyyy) you wish to run the checks.

Description: Produces a check register report of refund checks for financial aid, sorted by type of aid.

Special considerations: None

Gainful Employment Reporting

Overview

This section provides user information about Gainful Employment reporting. As outlined at http://ifap.ed.gov/GainfulEmploymentInfo/, National Student Loan Data System (NSLDS) guidelines state that, by Oct 1, 2011, all colleges must report information for award years beginning with 2006-2007 and continuing through 2010-2011. To be eligible for funding under the Title IV programs, an educational program must lead to a degree (associate, bachelor's, graduate, or professional) or prepare students for “gainful employment in a recognized occupation” (GE Programs).

Tracking Gainful Employment Information in CX

Within Gainful Employment reporting, programs are similar to majors. For example, a program at a community college that results in a certificate for Fire Fighting would be tracked in CX as a Fire Fighting major. For that reason, majors that either result in a degree or in a certificate that prepares for employment are flagged with a Gainful Employment value of Y in the Major table (major_table).

CAUTION

Each time you run this process, it resets all GE Records to the most current data values in the records. Consequently, you should run this process as many times as necessary before making manual updates.

Menu Locations for Process

Both the Financial Aid office and the Registrar’s office produce information needed for Gainful Employment Reporting. The menu options to generate the necessary records are located as follows:

Registrar

Student Management > Registrar > Reports > External Agencies > Student Gainful Employment

Financial Aid

Student Management > Financial Aid > Reports > Gainful Employment

Before You Begin

These tables are institution-specific. Before you set up these tables, you need to identify the following type of information:

- OPEID for your Institution

Process

The following process produces the required Gainful Employment information:

1. The Registrar's office creates Student Gainful Employment records (stuge_rec) using the menu option *Create GE Records*.
2. The Financial Aid office creates Gainful Employment records (gainfulemp_rec) using the menu option *Create GE Records*, on the Gainful Employment Menu
3. Both offices run the *GE Report* menu option to review the data generated from the creation process and note the areas where corrections are needed.
4. Financial Aid Office will have the option to update data using the Gainful Employment Data Entry Screen. This option will allow only the Financial Aid information created to be updated. Either or both offices access the *GE Data Entry* menu option to make corrections as needed.
5. When the data is correct, the Financial Aid office uses the *Export GE Records* menu option to create a file to be uploaded to the appropriate location.

Options

Create GE Records

Creates Records for year specified. Can be run in Trial Run Mode. Generates an email to indicate number of records created.

GE Data Entry

Allows Financial Aid Information to be viewed and updated.

Export GE Records

Exports Data in XML format. Can be run in Trial Run Mode.

GE Report

The report generates the following output:

- Id
- Fullname
- FFEL or DL Loan Participant
- Private Loan Amount Total
- Institutional Loan Amount Total
- Tuition & Fees
- Program
- Credential Level

Report Example

The Gainful Employment Report produces the following information.

Mon Aug 29 2011 Jenzabar University Page 1
18:04 Gainful Employment Report gainfulemp
Year:

ID	Fullname	FFEL or DL	Private Loans	Inst Amount	Tuit/ Fees	Program	Credential Level
14235	Abshear, Mary Evelyn	N	$	$	$		
96464	Babbette, Barney Billy	N	$	$	$		02
14200	Beerbower, Joel David	N	$	$	$	HIST	03
5061751	Billings, Borrick	N	$	$	$	BIO	02
5032348	Denn, Rynik W.	N	$	$	$	BUSM	02
5061813	Harney, George	N	$	$	$	BIO	02
92358	Lang, Keith Stephen	N	$	$	$	HRC	
5105996	Nahasapeemapetilon, Apu	N	$	$	$	BIO	03
1253479	Noble, Kathleen Jo	N	$	$	$	FRE	
92385	Obertacz, Kenneth M.	N	$	$	$	UNDE	
5101363	Parker, Peter	N	$	$ 1000	$206000	ART	03

Financial Aid Shopping Sheet

Overview

This section provides user information about the Financial Aid Shopping Sheet. As outlined in an Electronic Announcement posted on September 28, 2012 (http://ifap.ed.gov/eannouncements/092812ImplementoftheFinancialAidShopSheet.html), the student information on the Shopping Sheet is populated using the applicable fields from institutions' existing data systems. The data and information necessary to populate the institutional metrics section of the Shopping Sheet — the graduation rate, the loan default rate, and the median borrowing figures — are also covered in this documentation.

As described in Dear Colleague Letters GEN-12-12 and GEN 12-17, all institutions are encouraged to use the Shopping Sheet format as part of their financial aid awarding process beginning with the 2013-14 award year.

Financial Aid Shopping Sheet Information in CX

The U.S. Department of Education now requires specific data requirements to provide students with information regarding the total cost of education for the award year. As such, schools who signed the Principles of Excellence agreement with the Department of Education are now required to provide students with Financial Aid Shopping Sheet. The Financial Aid Shopping Sheet is a part of the Department's efforts to make information about the cost of college and financial aid packages more transparent and comparable for students and parents.

CAUTION

Two new fields have been added to the Financial Aid Initialization Screen. If set to "Y," the Automatic Schedule field will automatically insert a shopping sheet contact (SHOPSH) if any awards are added or updated.

Menu Locations for Process

Financial Aid

Student Management > Financial Aid > Student Processing > Shopping Sheet

Before You Begin

These tables are institution-specific. Before you set up these tables, you need to identify the following type of information:

- OPEID for your Institution
- IPEDS Type must be defined
- Budget Items must be defined

Process

The following process will insert a SHOPSH contact:

1. If the Automatic Schedule on the Financial Aid Initialization Screen is set to “Y”, anytime an Award is Inserted/Updated/Deleted, a “SHOPSH” will be scheduled. The process will check the aid_rec. amt = > 0 with a aid_rec. amt_stat_date = today and insert a schedule flag for the shopping sheet.
2. If the Automatic Schedule on the Financial Aid Initialization Screen is set to “N” and an award has been “updated/added/deleted”, the popup screen will display and ask the user to “Schedule Shop Sheet: Yes or No”. Regardless of the answer to the question, the “value” will be stored in aid_hist_rec.sched column.
3. If an Award is deleted and SHOPH flag is “N” on the initialization screen, the popup screen will display and ask the user, “Schedule Shop Sheet: Yes or No”. Regardless of the answer to the question, the “value” will be stored in aid_hist_rec.shopsh column.
4. If an award is “DELETED” after scheduling a Shopping Sheet, the SHOPSH contact will be updated with “V” contact for that insert.
5. Each time a shopping sheet is scheduled, it will assign the SHOPSH contact with an “E”. Once the form has been selected for printing, the contact is updated with SHOPSH## value, similar to the ANFORM process.
6. A new column was added to the stufa_rec to track the number of times the shopping sheet has been scheduled. This is similar to revision logic for the award letter.
7. The Financial Aid Entry Screen “scheduLe” option was modified to allow the user to choose Award Letters or Shopping Sheet.
8. The FA_IPEDS field from the aid table determines which category aid records are defined in for the shopping sheet.

   Valid Values are:

   - FG
   - SG
   - IG
   - FL
   - OL
   - FW
   - OW
   - SC (New) for Scholarships

Options

Schedule Shopping Sheet

The schedule process automatically inserts a SHOPSH contact for all students who have a automatic schedule flag in the aid record that is set to “Y” for the award year initialized on the Financial Aid Initialization screen.

Select Shopping Sheet

The select process looks for all students with SHOPSH contact of “E” and gathers all the data to prepare the FPS system for printing. This process automatically completes the SHOPSH## contact, updates the student aid record setting the auto schedule flag to “N”, and creates an aid history record.

Printing Shopping Sheet

The print process uses the standard FPS system. See the *Print Award Notices screen/Commands* topic in this section.

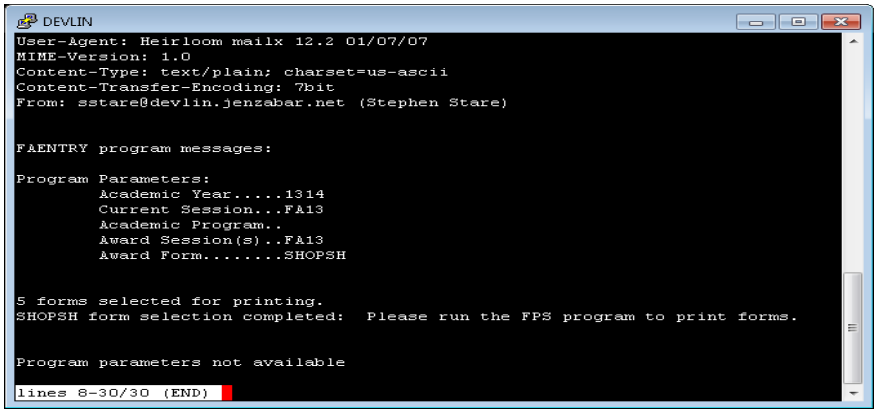
Import Aggregate Loan File

The import process will only import records based on the school’s OPEID which is defined in the config_table.COD_OPEID. The import populates the following values in the loan aggregate record:

- Unitdid
- OPEID
- Graduation Rate
- GR Group Low
- GR Group Low to Medium
- GR Group Medium to High
- GR Group High
- School CDR
- National Average CDR
- Median Total Borrowing
- Median Monthly Payment
- Institution Group
- Group

Example of Shopping Sheet Email:

Below is an example of the email when the select process has been run successfully.



Reporting Tools

Jenzabar provides several solutions to serve CX Financial Aid reporting needs. In addition to standard reports located on the CX Financial Aid menu, your institution can choose from a variety of reporting tools.

Standard Reports

The standard reports are located in the Jenzabar CX menu system. You can access and run them from the menus to which they relate. These reports were developed using the tools ACE Reporter and JasperReports. Many of the ACE reports have been or will eventually be replaced by Jasper reports as more of CX migrates to Java.

In either case, you can use the existing standard report as a starting point for your own customized report. Just use the same tool used to create the standard report to modify it to meet your needs.

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

For more information on ACE Reporter, see www.sct-associates.com.

For more information on JasperReports, see www.jaspersoft.com.

Cognos Reporting Tools

The optional addition of Cognos gives you a number of database query and reporting applications, including the following:

- **Query Studio** to create simple queries and ad hoc reports, modify existing ad hoc reports, apply basic formatting, and save results in a number of formats (such as PDF) to make them viewable by others.
- **Report Studio** to build sophisticated multi-page, multi-query reports against multiple databases, modify existing reports, and save results in all the formats available to Query Studio.
- **Analysis Studio** to apply advanced online analytical processing (OLAP) to isolate trends and answer operational questions.
- **Transformer** to create Power Cube models for use with Analysis Studio.

- **Framework Manager** to create and manage metadata for analysis and reporting.
- **Event Studio** to set up agents that monitor data and perform tasks to handle data exceptions and other events.

For more information on Cognos, see www.cognos.com.

System Messages

This section provides the following:

- Descriptions of the status, warning, field error, and fatal error messages that can appear while you are using Financial Aid.
- Information you need to respond to the status, warning, and error messages

Message Types

Four types of messages can appear in any CX module. The messages appear on the comment line, on the error line, in a dialog box, or in your email. The types of messages are:

- Status message
- Field error message
- Warning message
- Fatal error message

The following describes each of the four types of messages, by degree of severity.

Status

Assures you that the program is working properly when you select an option that involves a long pause.

- Can appear after you select a command or option, type data, or press a key
- Appears on the comment line
- Requires no action by you

Example: "Opening files ..."

Field error

Informs you of an invalid field value entered, and provides you with valid field values from which to choose.

- Can appear after you enter an invalid code in a field
- Appears on the error line
- Requires that you select a valid code from those provided in the field error message, a table lookup, or a query, and enter it into the field

Example: Valid values: (A,I)

Warning

Informs you of a condition you must be aware of before you can continue.

- Can appear after you select a command or option, type data, or press a key to begin or end a process that requires a decision
- Appears in a dialog box
- Requires you to act or make a decision
- Instructional; does not terminate processing

Example: Are you sure you want to exit? (Y/N)

Fatal error

Informs you of a serious problem occurring within the system.

- Can appear when the system is missing information (such as a required table or record) needed to continue processing, or when there is a program error
- Requires that you contact the Jenzabar coordinator immediately to resolve the problem
- Appears in a dialog box, or in your email, as well as in your Jenzabar coordinator's email
- Terminates processing

Example: "XXXX An unrecoverable error has occurred. Contact your Jenzabar coordinator."

Email Messages

Occasionally, Jenzabar programs send status or error messages to your email, as well as to the comment or error line. Programs do not send messages about background processes to the comment or error line, but only to your email. Such messages tell you any of the following information:

A process was completed successfully

When you see this message, you can delete or save them according to your preferences or established policy.

Errors have occurred while trying to complete a process

When you see this message, tell your Jenzabar coordinator about the message to resolve the problem.

Information cannot be found

When you see this message, try the process again with new field values.

Warning and Error Messages

The following list contains examples of some of the field error, warning, and fatal error messages that can appear when you use Financial Aid.

Warning messages do not affect program processing, while field error messages indicate problems you can correct by following the directions in the message. However, fatal error messages stop the processing of a program; if you receive a fatal error, contact your Jenzabar coordinator immediately.

#XX. Contact YY must be added manually

The contact code 'YY' cannot be added for student 'XX.' The contact must be added through Contact entry.

#XX: ID record not found: award notice not printed

This message occurs when printing award notification forms based on Contact records. Student ID ’XX’ has no identification record in the database. Leave the contact status as "E" (expected). Verify that the ID number given in 'XX' is a valid ID number.

#XX: Invalid aid subsidiary ID number (SS): ID record not found

The ID number 'SS' does not exist in the student's identification record in the database. You cannot add an invalid ID number.

%ld: Not eligible for Pell award: Cost=%d, Schd=%c

The student's need amount does not fall into the range of eligibility for a Pell award. Cost equals the budget amount. Schd equals students' assumed schedule (e.g., full-term, half-term, etc.).

Aid code '%s' has the disbursed flag set to 'Y' but does not have a corresponding Subsidiary Total Table entry needed for posting information.

The Aid code is defined in the Aid Code table as an aid that can be disbursed to the Student Accounts, but the After Adding Aid Codes process has not been run. Run the process from the Table Maintenance menu.

"Cannot start the Need Analysis program"

Try the Need command again. If you continue receiving the error, write down any other errors that appear with this message, and see your Jenzabar coordinator.

Could not get need information back from the Need Analysis program

Write down the error, and any others that appear with it, and see your Jenzabar coordinator.

Could not get status back from the Need Analysis program

Write down any errors that appear with this message, and see your Jenzabar coordinator.

Could not get information back from the Need Analysis program

Write down any errors that appear with this message, and see your Jenzabar coordinator.

Criteria 'XX' for file 'YY' must have a session and year specified

The Compliance tables need to be updated.

Criteria code 'XX' not found for requirement 'YY', sequence 'ZZ'

The Compliance tables need to be updated.

Document reference 'XX' not found in the Document Table

See your Jenzabar coordinator.

Error in locating award forms: XX

The system cannot locate a valid award notification form. Write down this error, and see your Jenzabar coordinator.

Expected contacts not found for form 'XX', tick 'YY', due 'ZZ'

You are printing award notifications in batch mode, and the system cannot locate the correct Contact records. See your Jenzabar coordinator.

FATAL error occurred in the Need Analysis program. Check your mail.

Exit Financial Aid Entry, and check your mail to identify why you received this fatal error. You may need to call your Jenzabar coordinator.

Highlighted aid code(s) cannot be updated in the current academic year

The aid codes that appear on the Financial Aid Entry screen have been added for a different financial aid year than the one you specified on the Financial Aid Entry Program Parameters screen. Go to this screen and correct the year.

Invalid Aid Code

You have entered an invalid Aid code. Enter a valid code and continue.

Invalid Option

You have selected a command that is not valid. Re-make your selection and continue.

Invalid academic program code: %

You have entered an academic program code on a Financial Aid Entry screen. If using interactive mode, enter the correct code. If you are printing award notifications or posting, you must call your Jenzabar coordinator to help you restart Financial Aid Entry.

Invalid award form: 'XX'

See your Jenzabar coordinator.

Invalid relational operator 'XX' in compliance criteria table for 'YY'

The Compliance tables need to be updated.

Invalid session and year value: XX

You entered a session and year that is not defined in the Fiscal Calendar record. See your Jenzabar coordinator.

Min. State Grant Table is not set up for award year '%s', acyr

If your institution is not a Minnesota institution, the DO_MN_ST_GRANT include needs to be undefined in the /include/custom/finaid file. Contact your Jenzabar coordinator.

"Operator site differs from student's site" plus any of the following:

- Cannot access text
- Cannot output form
- Cannot output transcript
- Cannot schedule output
- No add allowed
- No delete allowed
- No packaging allowed
- No update allowed

The Jenzabar CX SITE variable for the user or the student may need to be updated. Contact your Jenzabar coordinator.

Program Enrollment record not found for this student.

This is for your information only. A Program Enrollment record is not required to award financial aid.

Warning: Student has been awarded aid in other %s sessions not displayed.

The Award Session(s) field on the Financial Aid Entry Program Parameters screen does not include all of the sessions for the award year. The student has been awarded aid in a session not entered in the Award Session(s) field.

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