



JENZABAR **CX**

Financial Aid

User Guide

Tasks and Tools

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Getting Started

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

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

Product Differences

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

Purpose of This Guide

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

Intended Audience

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

Learning Objectives

Using this guide you will be able to:

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

How to Use This Guide

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

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

Other Information Resources

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

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

For more information about	See
Common windows	<i>Getting Started User Introduction</i>
Communication management	<i>Communication Management User Guide</i>
Detail windows	<i>Getting Started User Introduction</i>
CX menus	<i>Getting Started User Introduction</i>
CX universal commands: · Help · ID-type · Query · Scroll · Table Lookup	<i>Getting Started User Introduction</i>
Financial Aid Electronic Data Exchange	<i>Financial Aid Electronic Data Exchange (EDE) User Guide</i>
Financial Aid Need Analysis	<i>Financial Aid Need Analysis User Guide</i>
Financial Aid Packaging	<i>Financial Aid Packaging User Guide</i>
Financial Aid Pell Grant processing	<i>Financial Aid Electronic Data Exchange (EDE) User Guide</i>
Financial Aid reports	<i>Financial Aid Technical Reference</i>
Financial Aid screen flow diagram	<i>Financial Aid Technical Reference</i>
Financial Aid tables and table maintenance	<i>Financial Aid Technical Reference</i>
Program screens: · Common commands · General description · Toolbars	<i>Getting Started User Introduction</i>
Query tools	<i>Getting Started User Introduction</i>
Registration	<i>Registration User Guide</i>
Reporting tools	<i>Getting Started User Introduction</i>
Student Billing	<i>Student Billing User Guide</i>

Before You Begin Using Financial Aid Entry

This section provides the following:

- The purpose of Financial Aid Entry

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

Purpose of Financial Aid Entry

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

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

Prerequisite Tasks

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

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

Background Knowledge

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

Jenzabar CX

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

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

Authorized personnel

Know answers to the following questions:

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

Important dates

Know when the following events occur:

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

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

Financial aid policies and procedures

Know answers to the following questions:

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

Financial Aid Entry Process

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

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

1. The Admissions office/Registration office enters student ID numbers and other enrollment information.

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

Conventions Used in This Guide

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

Style Conventions

Jenzabar CX guides observe the following style conventions.

Boldface type

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

Bulleted lists

Show items not ranked or without a sequential performance.

CAUTION

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

<Enter>

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

Italic type

Is used in any of these ways:

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

<Key name>

Represents a key that you must press.

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

Numbered lists

Show ranking of items or sequence of performance.

Parentheses

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

Quotation marks

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

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

Jenzabar-Specific Terms

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

Application

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

Data

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

Enter

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

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

F key

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

Hot key

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

ID

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

Parameter

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

Select

To execute a command by any of the following actions:

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

System

The Jenzabar product, CX.

Keystrokes

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



Managing Information

This section provides information and step-by-step procedures to follow when you:

- Display a student's financial aid and statuses
- Select a need analysis methodology to display the student's desired budget, Expected Family Contribution (EFC), and need amounts
- Add, update, and/or delete a student's financial aid award(s) and status(es)
- Reverse a student's posted financial aid award(s)
- Add, update, and/or delete a student's cumulative financial aid award history
- Run the audit process after making any changes

Before You Begin

Before you begin to use the following procedures for managing financial aid information, remember:

- An ID record for the student must already exist on the system.
- The student does not have to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the screens.

Previous and Transfer Sessions

Financial Aid Entry allows you to enter a student's historical financial aid information from previous and transfer sessions. Following is the description of these two session types.

Previous

The student was awarded financial aid in a session prior to the implementation of CX. The Historical code for a previous session is PREV.

Transfer

The student was awarded financial aid while attending another institution. The Historical code for a transfer session is XFR.

Historical Information on Transcripts

Financial Aid Entry accumulates a student's historical awards for previous sessions (PREV) in the totals printed in Section D of the financial aid transcript. The transcript does not include amounts for transfer sessions (XFR) because it reflects only those awards made to the student at the current institution.

Process

The following list shows the general phases that take place before, during, and after managing students' financial aid information.

1. Access Financial Aid Entry and enter appropriate parameters for processing financial aid information. If entering award history, select **Cumulative History**.
2. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
3. Select **Update**.
4. Complete and save all field entries.
5. Run the audit process to check Aid records (aid_rec) and Student Financial Aid records (stufa_rec), verify aid fund balances, and update any error conditions found after making any changes.

Commands

Select the following commands to manage financial aid information for a student:

- **Cumulative History** – If you are managing cumulative history information.

Note You execute this command from the Financial Aid Entry Program Parameters screen.

- **Update** – To add, update, and/or delete financial aid award information or cumulative history information for a student. This command is an instruction from you to the system that does the following:
 - Notifies the system to begin the Update mode.
 - Changes the command line by adding **Add** and **Delete** commands allowing you to access other commands such as **Compliance**, **Funds**, **Toggle**, and **Help**.

Displaying a Student's Award Information

The Financial Aid Entry screen contains commands that adjust the display and/or calculation of a student's financial aid information. Review the usage of the commands below before you add, update, and/or delete financial aid information.

Toggle

This command allows you to display a student's records with either Amount Status codes or Packaging Method Status codes. When you select the **Toggle** command, the following occurs:

- If the Am field is currently displayed, the system replaces the Am field with the Pk field.
- If the Pk field is currently displayed, the system replaces the Pk field with the Am field.

The Am field displays the amount status for the specific aid code. The Pk field displays the packaging method status for the specific aid code. For more information on valid statuses for each field, see the section *Using the Financial Aid Screens* in the *Financial Aid User Reference*, or select the **Help** command on the Financial Aid Entry screen.

Note The packaging method status is available only if the interactive Financial Aid Packaging product is available.

Method

This command allows you to access the Financial Aid Methodology Selection window that lets you select the need analysis methodology for the student. When you select a need analysis methodology (e.g., FM), it appears in the (Financial Aid Need Analysis Form Record/Method) field on the Financial Aid Entry screen, which displays information about the student's budget, need, and unmet amount.

Note For more information about selecting a methodology, see the *Financial Aid Methodology Selection Window* in this guide.

Adding Financial Aid Information

This section provides two procedures for adding financial aid information: a standard procedure and a procedure if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

How to Add Financial Aid Information

Follow these steps to add financial aid information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.
 - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).
 - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Does the student have existing financial aid entries?
 - If yes, the cursor appears in the Total field. Select **Add-Line**, and a blank line appears with the cursor in the Code field.
 - If no, the cursor appears in the Code field.
8. Enter the financial aid code. The cursor moves to the Total field.
9. Enter the total amount of the aid, and press <Tab>. The system calculates the amount to be awarded for each session and enters this information in the remaining fields, and enters statuses in the Ad and Am fields.
10. Do you want to enter additional financial aid information?
 - If yes, select **Add-Line**. A blank line appears with the cursor in the Code field. Go to step 7.
 - If no, select **Finish**. Go to step 10.

11. Do you want to add financial aid information for another student?
 - If yes, select **Query** and go to step 3.
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
12. Select **Yes**. The Financial Aid: Student Processing menu reappears.

How to Add Financial Aid Information Using Automatic Recalculation

Follow these steps to add financial aid information when the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student’s ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.
4. The system loads the student’s financial aid information and verifies compliance.
 - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution’s fiscal calendar in the Fiscal Calendar record (fsc_l_cal_rec).
 - The message “Program Enrollment record not found for this student” may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Does the student have existing financial aid entries?
 - If yes, the cursor appears in the Ad field. Select **Add-Line**, and a blank line appears with the cursor in the Code field.
 - If no, the cursor appears in the Code field.
8. Enter the financial aid code. The Aid by Enrollment Status List window appears.
9. Enter the total amount of the aid in the Total Amount field, and select **Finish**. The message “Update all enrollment amounts?” appears.

10. Do you want the system to automatically update enrollment amounts?
 - If yes, select **Yes**. The system calculates the aid to be awarded for each session based on the ratios you entered in the Proportion fields on the Financial Aid Entry Program Parameters screen, and the amounts for each enrollment status based on the values in the Aid Detail table (aiddtl_table).

If the system does not find a value in this table, you may get warning messages informing you it will use the full award for each enrollment status. Select **OK** for each message. The system equally distributes the aid among all sessions.
 - If no, select **No**. The cursor appears in the first Enrollment Status field. Enter the amount for each session for the appropriate enrollment status. Press <Tab> to move to each field, if necessary.
11. Select **Finish**. The Financial Aid Entry screen reappears displaying the new financial aid information.
12. Do you want to add additional financial aid information?
 - If yes, go to step 6.
 - If no, select **Finish**.
13. Do you want to add financial aid information for another student?
 - If yes, select **Query** and go to step 3
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears
14. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Updating Financial Aid Information

This section provides two procedures for updating financial aid information: a standard procedure and a procedure if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

How to Update Financial Aid Information

Follow these steps to update financial aid information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student’s ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.
4. The system loads the student’s financial aid information and verifies compliance.

- You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).
 - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
 6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
 7. Is the cursor on the row you want to update?
 - If yes, go to step 7.
 - If no, use the <Arrow> keys to move the cursor to the correct row.
 8. Update the necessary information in the appropriate fields (e.g., the award amount). Press <Tab> to move to each field, if necessary. The system recalculates and updates the affected fields.

You cannot delete the aid code. If you want to change the aid code, you must delete it first, then add the new financial aid information. For these procedures, see *Deleting Financial Aid Information* and *Adding Financial Aid Information* in this section.
 9. Do you want to update additional financial aid information?
 - If yes, go to step 6.
 - If no, select **Finish**.
 10. Do you want to update financial aid information for another student?
 - If yes, select **Query** and go to step 3.
 - If no, select **Exit**. The message "Are you sure you want to exit?" appears.
 11. Select **Yes**. The Financial Aid: Student Processing menu reappears.

How to Update Financial Aid Information Using Automatic Recalculation

Follow these steps to update financial aid information when the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.

- If no, select **Query** to perform a query.
- 4. The system loads the student's financial aid information and verifies compliance.
 - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).
 - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
- 5. Select **Update**.
- 6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
- 7. Is the cursor on the row you want to update?
 - If yes, go to step 7.
 - If no, use the <Arrow> keys to move the cursor to the correct row.
- 8. Select **Detail**. The Aid by Enrollment Status List window appears.
- 9. Update the amount of the award in the Total Amount field, and select **Finish**. The message "Update all enrollment amounts?" appears.
- 10. Do you want the system to automatically update enrollment amounts?
 - If yes, select **Yes**. The system calculates the aid to be awarded for each session based on the ratios you entered in the Proportion fields on the Financial Aid Entry Program Parameters screen, and the amounts for each enrollment status based on the values in the Aid Detail table (aiddtl_table).

If the system does not find a value in this table, you may get warning messages informing you it will use the full award for each enrollment status. Select **OK** for each message. The system equally distributes the aid among all sessions.
 - If no, select **No**. The cursor appears in the first Enrollment Status field. Enter the amount for each session for the appropriate enrollment status. Press <Tab> to move to each field, if necessary.
- 11. Select **Finish**. The Financial Aid Entry screen reappears displaying the new financial aid information.
- 12. Do you want to update additional financial aid information?
 - If yes, go to step 6.
 - If no, select **Finish**.
- 13. Do you want to update financial aid information for another student?
 - If yes, select **Query** and go to step 3.
 - If no, select **Exit**. The message "Are you sure you want to exit?" appears.

14. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Processing Financial Aid Following an Automatic Recalculation Error

The Financial Aid office of your institution must inform the Registration office as to the time period when the Automatic Recalculation processes will occur as defined in the Financial Aid Session table (fasess_table). However, situations may arise in the Registration office when Automatic Recalculation does not occur, such as if a student's records are locked or as a result of a billing error.

In these situations, the system performs the following actions:

1. Sends two messages to the user's computer in the Registration office. The first message indicates that the system is attempting to run Automatic Recalculation. The second message informs the user the system could not do Automatic Recalculation.
2. Sends one or more email messages to the user in the Registration office and other individuals as defined in the Mail Group macro (MPKG_MAIL_GROUP). Other recipients can include the Financial Aid office and the Jenzabar coordinator. The message(s) notifies the recipients that an error has occurred with Automatic Recalculation and why.
3. Adds an Automatic Recalculation error contact (RCALCERR) to the student's Contact record with an expected status. If necessary, you can obtain a list of the students who had this contact added to their records from the Financial Aid office. After the problem has been resolved or the records unlocked, either office (Registration or Financial Aid) can use this list to identify those students whose records need to be accessed to cause Automatic Recalculation to occur.

Note If the process to run Automatic Recalculation following an error is done on a date after the Automatic Recalculation period, the Registration office must run the process. The Registration office sets the Effective Date field on the Registration Initialization screen to a date within the automatic recalculation period and forces Automatic Recalculation to take place. For more information, see the *Registration User Guide*.

How to Create the Contact Status Report by Contact Resource

Follow these steps to create a list of the students who had the Automatic Recalculation error contact (RCALCERR) added to their records.

1. From the Document Tracking: Reports menu, select the menu option Contact Range.
2. Enter the name of the Automatic Recalculation error contact (i.e., RCALCERR) in the First and Second fields, and select **Finish**. The Output Parameters and Scheduling window appears.

Ensure E appears in the Status field to include only new students who had the contact added to their records.
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Document Tracking: Reports menu reappears.

- For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
- If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for those students who have the contact you specified with an expected status and creates the report. After the system completes the process, it sends you email informing you if it completed successfully. If you sent the report to a file, it includes the name of that file in your home directory.

How to Process Financial Aid Following an Error in Automatic Recalculation

After you create the list of students who had the Automatic Recalculation error contact added to their records, the Financial Aid office should follow these steps to process financial aid following an error in Automatic Recalculation.

1. From the menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Enter the student’s ID number from the Contact Status Report by Contact Resource. The system loads the student’s financial aid information and verifies compliance.
 - You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution’s fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).
 - The message “Program Enrollment record not found for this student” may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
4. Select **Update**, then select **Finish**. The system processes the student’s financial aid using Automatic Recalculation and updates the status of the Automatic Recalculation error contact (RCALCERR) to completed.
5. Do you want to query on another student?
 - If yes, select **Query** and go to step 3.
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
6. Select **Yes**. The menu reappears.

Deleting Financial Aid Information

Follow these steps to delete financial aid information.

Note You cannot delete aid that has been disbursed/posted; that is, an award with an amount status (in the Am field) of AD (Actual award totally disbursed) or AP (Actual award partially disbursed). You can, however, reverse a portion of the amount or the total amount of the award in the Student Accounts (S/A). For this procedure, see *Reversing Posted Financial Aid Information* in this section.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.
 - You may get a warning message if the student has been awarded aid in other sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fsc1_cal_rec).
 - The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.
5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row you want to delete?
 - If yes, go to step 7.
 - If no, use the <Arrow> keys to move the cursor to the correct row.
8. Select **Del-Line**. The message "Delete 'code' award? (Y/N)" appears.
9. Select **Yes**. The message "Code has been deleted" appears in the comment line.

If you select **No**, no action occurs.
10. Do you want to delete additional financial aid information?
 - If yes, go to step 6.
 - If no, select **Finish**.
11. Do you want to delete financial aid information for another student?
 - If yes, select **Query** and go to step 3.
 - If no, select **Exit**. The message "Are you sure you want to exit?" appears.
12. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Reversing Posted Financial Aid Information

You cannot delete financial aid information that has been disbursed/posted. However, you can reverse a portion of the amount or the total amount of the award in the Student Accounts (S/A). This section provides two procedures for reversing posted financial aid information: a standard procedure and a procedure if the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

How to Reverse Posted Financial Aid Information

Follow these steps to reverse posted financial aid information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

Note You may get a warning message if the student has been awarded aid in other sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).

5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row you want to reverse (i.e., the status of the aid amount in the Am field is AD)?
 - If yes, go to step 7.
 - If no, use the <Arrow> keys to move the cursor to the correct row.

To maintain the student's award information for historical purposes, Jenzabar recommends that you use the Comments screen and enter a note including the amount that was reversed and why. For more information about using comments, see the section *Using Financial Aid Comments* in this guide.

8. Do you want to reverse the total award?

- If yes, enter **0** in the Total field, then press **<Tab>**. The system updates the amount awarded for each session to 0 and updates the aid amount status in the Am field for the posted aid from AD to AP.

If you do not want to reverse the total award, you can reverse a portion of it by entering the new amount in the Total field. The system recalculates the amount for each session and displays these values. It also updates the aid amount status in the Am field for the posted aid from AD to AP.

- If no, press **<Tab>** to move the cursor to the session field displaying the amount awarded you want to reverse (e.g., FA09). Enter **0**, then press **<Tab>**. The system updates the aid amount status in the Am field for the posted aid from AD to AP. The system also updates the Total field to reflect the amount of the award(s) remaining in the other session(s).

If you do not want to reverse the total award for the session, you can reverse a portion of it by entering the new amount in the session field. The system updates the aid amount status in the Am field for the posted aid from AD to AP. The system also updates the Total field to reflect the amount of the award(s) remaining in the other session(s).

9. Do you want to reverse additional posted financial aid information for the student?

- If yes, go to step 6.
- If no, select **Finish**.

10. Do you want to reverse financial aid information for another student?

- If yes, select **Query** and go to step 3.
- If no, select **Exit**. The message “Are you sure you want to exit?” appears.

11. Select **Yes**. The Financial Aid: Student Processing menu reappears.

The student’s financial aid must be posted again to reverse the amount of the award you changed in the Student Accounts (S/A). For more information about posting financial aid by running the Post Financial Aid process, see the *Student Billing User Guide*. When the Post Financial Aid process is run, the system debits the Student Accounts (S/A) for the amount of the reversed financial aid and updates the status of the aid amount in the Am field to AD.

How to Reverse Posted Financial Aid Information Using Automatic Recalculation

Follow these steps to reverse posted financial aid information when the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student's ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.
4. The system loads the student's financial aid information and verifies compliance.

Note You may get a warning message if the student has been awarded aid in other sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fsc1_cal_rec).

5. Select **Update**.
6. Change the Prog and Pkg fields, if necessary, and select **Finish**.
7. Is the cursor on the row and in the correct session you want to reverse (i.e., the status of the aid amount in the Am field is AD)?
 - If yes, go to step 7.
 - If no, use the <Arrow> keys to move the cursor to the correct row and session.

To maintain the student's award information for historical purposes, Jenzabar recommends that you use the Comments screen and enter a note including the amount that was reversed and why. For more information about using comments, see the section *Using Financial Aid Comments* in this guide.

8. Select **Detail**. The Aid by Enrollment Status List window appears.
9. Enter **0** in the Total Amount field, and select **Finish**. The message "Update all enrollment amounts?" appears.

You can reverse a portion of the total award by entering the new amount in the Total Amount field.

10. Select **Yes**. The system zeros out the amount for each enrollment status.

If you reversed a portion of the award, the system recalculates the amount for each enrollment status.
11. Select **Finish**. The Financial Aid Entry screen reappears displaying the new financial aid information: The system updates the aid amount status in the

Am field for the posted aid from AD to AP, and it updates the Total field to reflect the amount of the award(s) remaining in the other session(s).

12. Do you want to reverse additional posted financial aid information for the student?

- If yes, go to step 6.
- If no, select **Finish**.

13. Do you want to reverse financial aid information for another student?

- If yes, select **Query** and go to step 3.
- If no, select **Exit**. The message “Are you sure you want to exit?” appears.

14. Select **Yes**. The Financial Aid: Student Processing menu reappears.

The student’s financial aid must be posted again to reverse the amount of the award you changed in the Student Accounts (S/A). For more information about posting financial aid by running the Post Financial Aid process, see the *Student Billing User Guide*. When the Post Financial Aid process is run, the system debits the Student Accounts (S/A) for the amount of the reversed financial aid and updates the status of the aid amount in the Am field to AD.

Adding Cumulative Award History Information

Follow these steps to add cumulative award history information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.

If you are currently in Financial Aid Entry, select the **Initialize** command to access the Financial Aid Entry Program Parameters screen.

2. Select **Cumulative History**. The system enters historical codes in the associated fields:

- Award Session(s) = PREV XFR
- Award Year = HIST
- Default Program = HIST
- Session = PREV XFR

These fields become display-only to ensure you do not enter current awards as historical awards. The system ignores entries in the Current Session, Proportion, and Extra fields.

3. Select **Finish**. The Financial Aid Entry screen appears in Query mode.

4. Do you know the student’s ID or Social Security number?

- If yes, enter the number in the ID field and select **Finished**.
- If no, select **Query** to perform a query.

You may get a warning message if the student has been awarded aid in other HIST sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum

of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).

The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.

5. Select **Update**.
6. Select **Finish** to accept the default code in the Pkg field.
7. Does the student have existing financial aid entries?
 - If yes, the cursor appears in the PREV field. Select **Add-Line**, and a blank line appears with the cursor in the Code field.
 - If no, the cursor appears in the Code field. Go to step 8.
8. Enter the financial aid code (e.g., PELL). The cursor advances to the PREV field.
9. Enter the cumulative dollar amount of the aid awarded in the following fields. Press <Tab> to move to each field, if necessary.
 - PREV (For aid awarded to the student in a session prior to the implementation of CX).
 - XFR (For aid awarded to the student while attending another institution).
10. The system enters the total of both fields in the Total field and recalculates the amount in the (Grand Total) and (Session Total) fields.

The system displays and ignores default values in the Ad and Am fields.
11. Do you want to enter cumulative award history for another financial code?
 - If yes, go to step 7.
 - If no, select **Finish**.
12. Do you want to enter cumulative award history for another student?
 - If yes, select **Query** and go to step 4.
 - If no, select **Exit**. The message "Are you sure you want to exit?" appears.
13. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Updating Cumulative Award History Information

Follow these steps to update cumulative award history information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.

If you are currently in Financial Aid Entry, select the **Initialize** command to access the Financial Aid Entry Program Parameters screen.

2. Select **Cumulative History**. The system enters historical codes in the associated fields:
 - Award Session(s) = PREV XFR
 - Award Year = HIST
 - Default Program = HIST
 - Session = PREV XFR

Note These fields become display-only to ensure you do not enter current awards as historical awards. The system ignores entries in the Current Session, Proportion, and Extra fields.

3. Select **Finish**. The Financial Aid Entry screen appears in Query mode.
4. Do you know the student's ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.

You may get a warning message if the student has been awarded aid in other HIST sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).

The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.

5. Select **Update**.
6. Select **Finish** to accept the default code in the Pkg field.
7. Is the cursor on the row you want to update?
 - If yes, go to step 8.
 - If no, press the <Arrow> keys to move the cursor to the correct row.
8. Update the necessary fields (i.e., the PREV and/or XFER fields). Press <Tab> to move to each field, if necessary. The system recalculates the amount in the Total, (Grand Total) and (Session Total) fields.
9. Do you want to update cumulative award history for another financial code?
 - If yes, go to step 7.
 - If no, select **Finish**.

10. Do you want to update cumulative award history for another student?
 - If yes, select **Query** and go to step 4.
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
11. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Deleting Cumulative Award History Information

Follow these steps to delete cumulative award history information.

1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.

If you are currently in Financial Aid Entry, select the **Initialize** command to access the Financial Aid Entry Program Parameters screen.

2. Select **Cumulative History**. The system enters historical codes in the associated fields:
 - Award Session(s) = PREV XFR
 - Award Year = HIST
 - Default Program = HIST
 - Session = PREV XFR

Note These fields become display-only to ensure you do not enter current awards as historical awards. The system ignores entries in the Current Session, Proportion, and Extra fields.

3. Select **Finish**. The Financial Aid Entry screen appears in Query mode.
4. Do you know the student’s ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.

You may get a warning message if the student has been awarded aid in other HIST sessions not displayed. If so, select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution’s fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).

The message “Program Enrollment record not found for this student” may also appear in the comment line if the student is not yet enrolled. This is a warning message only.

5. Select **Update**.
6. Select **Finish** to accept the default code in the Pkg field.
7. Is the cursor on the row you want to delete?
 - If yes, go to step 8.
 - If no, press the <Arrow> keys to move the cursor to the correct row.

8. Select **Del-Line**, and the message “Delete ‘code’ award? (Y/N)” appears.
9. Select **Yes**. The message “Code has been deleted” appears in the comment line.
10. Do you want to delete cumulative award history for another financial code?
 - If yes, go to step 7.
 - If no, select **Finish**.
11. Do you want to delete cumulative award history for another student?
 - If yes, select **Query** and go to step 4.
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
12. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Changing Award Statuses in Batch

Award statuses appear on the Financial Aid Entry screen and indicate whether the student has accepted or received any or all aid awarded, or whether there is any action taken by the institution to hold or nullify the award. You can change the statuses individually for each student/aid type combination, or you can use a batch process to update aid statuses based on award year, aid code, and new aid status.

The batch process will update individual aid statuses that do not have an “AP” or “AD” amount status.

If you use the batch process, you can either provide a file of IDs, or you can enter the IDs through the program screens.

Note This process is similar to Contact Batch Entry in that it can update awards for a group of students in batch mode, just as Contact Batch Entry can update contacts. For more information, see *Communication Management User Guide*.

Changing Statuses Using an Input File

To use the batch process to change statuses for a group of students designated in a file:

1. Create an ASCII file of IDs or Social Security numbers for the students for whom you want to change the statuses. Make sure only one ID or Social Security number is on each line of the file, with a <Return> at the end of each line. Also make sure your file name is 13 characters or less in length, and that it is stored in your home directory.
2. Select Student Processing>Aid State Batch from the Financial Aid menu.
3. Designate the award year for which you want to change the status.
4. Designate the aid code for which you want to change the status, or leave blank for all.
5. Designate the new status to which you want to change all the existing status codes.
6. Enter the file name for the file you created in step 1.

7. Select **Finish**. The system will execute the process and change the statuses.

Changing Statuses Using Program Screens

To use the batch process to change statuses for a group of students designated in a file:

1. Select Student Processing>Aid State Batch from the Financial Aid menu.
2. Designate the award year for which you want to change the status.
3. Designate the aid code for which you want to change the status, or leave blank for all.
4. Designate the new status to which you want to change all the existing status codes.
5. Select **Finish**. The Aid State Batch Update – Parameters screen opens, and is overlaid with the ID List window.
6. Enter the IDs or Social Security numbers for which you want to change the status. The system assumes any 9-character value is a Social Security number; hyphens in the numbers are optional.
7. Change the parameters as desired by selecting **Edit Aid**.
8. When the student information and the parameters are completed as desired, select **Done**. The system prompts you to confirm you want the statuses to be changed.

Running the Audit Process

Follow these steps to run the audit process to check Aid records (aid_rec) and Student Financial Aid records (stufa_rec), verify aid fund balances, and update any error conditions found after making any changes.

Note Jenzabar recommends that you run the audit process on a regular basis to ensure fund balances are accurate and to correct any errors found. You should run the process before posting financial aid. For more information about posting financial aid, see the *Student Billing User Guide*.

CAUTION

You should run the audit process when no one else is on the system to avoid any problems with locked records.

1. From the Student Management: Financial Aid Main menu, select the menu option Audits. The Financial Aid: Audit menu appears.
2. Select the menu option Audit – With Update. The Audit – With Update screen appears.

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 Introduction*.

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.



Displaying Financial Aid Information

This section provides information and step-by-step procedures to follow when you:

- Display current financial aid fund balances
- Display a student's awarded and posted financial aid amounts
- Verify a student's compliance to awarded financial aid
- Display the compliance requirements for a financial aid type

Before You Begin

Before you begin to use the following procedures for displaying financial aid information, remember:

- An ID record for the student must already exist on the system.
- The student does not have to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the screens.

Process

The following list shows the general phases that take place before displaying financial aid information.

1. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information.
2. Query a student's financial aid record(s) to display them on the Financial Aid Entry screen.
3. Display financial aid information.

Commands to Use

Select the following commands to display financial aid information for a student:

- **Funds** – To access the Current Fund Balances screen enabling you to view the current financial aid fund balances information.
- **Disbursed** – To access the Award Disbursements screen enabling you to view a student's awarded aid and the amount of each award that has been disbursed in total and for each session.
- **Verify-Comp** – To verify a student's compliance on each award displayed.
- **Compliance** – To access the Compliance Requirements screen enabling you to view a student's compliance results for a specific type of financial aid.

Note You can display current fund balances and compliance requirements for any aid before awarding financial aid to a student regardless of the particular student's award(s) that currently appear in the Financial Aid Entry screen.

Displaying Current Fund Balances

Follow these steps to display current fund balances.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, select **Funds**. The Current Fund Balances screen appears.
2. Select **Query** and enter the necessary information in the appropriate fields.
 - If your institution makes distinctions among students, such as new or returning, you can split fund balances among the different categories, and you must enter a value in the Category field. Otherwise, leave this field blank.
 - In the Balance Type field, enter a method to view the fund balance information from aid packaging simulation records or enter **ACT** (default method) for the actual fund amounts.
3. Select **Finish**. The fund balance information appears.
4. Do you want to view another financial aid fund balance?
 - If yes, go to step 2.
 - If no, select **Close**. The Financial Aid Entry screen reappears.

Displaying Awarded and Disbursed Financial Aid

Follow these steps to display awarded and disbursed financial aid.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, select **Disbursed**. The Award Disbursements screen appears, displaying the student's awarded aid and the amount of each award that has been disbursed. The system displays this information in total and for each session. The sessions displayed depend on the sessions you entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four.

If the student's disbursed amount is not equal to the awarded amount for a financial aid award, an asterisk (*) appears to the left of the code, and the message "(*) Disbursed amount is not equal to the awarded amount." appears in the comment line.

2. Do you want to display up-to-date award disbursement information for the student?
 - If yes, select **Re-Execute**. If the student's award disbursement information has changed since you (or another user) last accessed the Award Disbursements screen, the system updates the information displayed on the screen.
 - If no, go to step 3.

3. Do you want to display a student's refund amount?

You can access the Refunds screen if your institution refunds unused financial aid to students, if the system is set up to utilize the Refundable Aid processes, and if the student has refundable aid awarded. For more information, see the section *Refunding Financial Aid* in this guide.

- If yes, select **Refund**. The Refunds screen appears, enabling you to view refundable financial aid amounts and to interactively move refundable financial aid from the Student Accounts (S/A) to the Student Refunds (S/R) prior to processing a refund check. The system also displays any checks processed from refundable financial aid.
 - If no, go to step 4.
4. When you finish viewing the student's awarded and disbursed awards, select **Close**. The Financial Aid Entry screen reappears.

Displaying Compliance to Financial Aid

Follow these steps to display financial aid compliance information for any of the following reasons:

- To verify a student's compliance for each displayed financial aid award.
- To view the institution's compliance requirements for any financial aid code/fund and the student's compliance results whether or not the aid has been awarded to the student.
- To view the sequence of criteria associated with the compliance requirements and the student's compliance results for each criterion.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, do you want to verify a student's compliance for all awards displayed? Based on the Year or the Session?
 - If yes, to check the Session, select the CTRL-U Toggle to first determine which session a student maybe failing compliance. If both sessions have (*) then that indicates that the student is failing the requirement for both sessions, and further review of the Detail records may be necessary.
 - If yes, to check the Year, select **Verify-Comp**. The message "Verifying compliances..." appears in the comment line.

If the student passes compliance for all awards displayed, the message "Award compliance is met on all displayed financial aid." appears in the comment line. If the student fails compliance for any award displayed, the message "(*) Aid failed compliance. Use the Compliance command to see more detail." appears in the comment line, and an asterisk (*) appears to the left of each award for which the student fails to meet compliance requirements.
 - If no, go to step 2.
2. Do you want to view the institution's compliance requirements for a specific type of financial aid award?
 - If yes, select **Compliance**. The Compliance Requirements screen appears with the cursor in the Aid field, and the Session field to indicate if you want to check compliance based on the "Session" or the "Year".
 - If no, go to step 8.
3. Enter the type of aid for which you want to view compliance requirements, and select **Finish**. Your institution's compliance requirements for that aid appears.
4. Do you want to view the sequence of criteria associated with a compliance requirement and the student's compliance results for each criterion?
 - If yes, select **Detail**. The Type field in the Requirements segment becomes active (i.e., a dotted square appears around the type).
 - If no, go to step 8.

5. Move the cursor to the requirement for which you want to view the sequence of criteria. Use the <**Arrow**> keys, and **Forward** and **Back** to move the cursor to the appropriate line. Select **Finish**. The Compliance Detail Information screen appears displaying the sequence of criteria for the requirement and the student's results.
6. When you have completed viewing the sequence of criteria, select **Close**. The Compliance Requirements screen reappears.
7. Do you want to view the sequence of criteria associated with another compliance requirement and the student's compliance results for each criterion?
 - If yes, go to step 4.
 - If no, go to step 8.
8. Do you want to view the institution's compliance requirements for another specific type of financial aid award?
 - If yes, select **Query** and go to step 3.
 - If no, select **Close**. The Financial Aid Entry screen reappears.



Academic Progress

This section provides information and step-by-step procedures to follow when you:

- Select students to be processed for Satisfactory Academic Progress (SAP)
- Process selected students for SAP compliance
- Perform SAP actions
- Create the Contact Status Report by Contact Resource to produce a list of students whose records have been updated by the SAP processes
- Create a SAP Listing Report to verify students' SAP statuses

The SAP processes review the academic progress of financial aid recipients at the end of each session as well as at the end of the year. Conditions checked by the system include each student's minimum grade point average, cumulative earned hours, and percentage of the current year and session attempted hours.

The SAP Compliance process compares a student's records with the compliance criteria as determined by your institution and updates specific fields in the student's records. The awarding and posting process uses these updated fields to determine the student's aid level.

Before You Begin

Before you begin to use the procedures for running the SAP processes, remember the following:

- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- Your institution must determine the criteria that students' records are compared to during the SAP compliance process.
- Your institution must also determine under what conditions certain actions will be taken. These actions might include sending warning letters or placing financial aid on hold.
- You run all SAP processes in the background. When the system completes each process, it sends email informing you if the process completed successfully and what action was taken for each student.
- You should run all SAP processes consecutively. After you run the select and compliance processes, you can create the Contact Status Report by Contact Resource for a list of students who had SAP contact(s) added to their records. For more information, see *How to Create the Contact Status Report by Contact Resource* in this section.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the screens.

Process

This list shows the general phases that take place before, during, and after running the SAP processes.

1. Select the students to be processed for SAP. Depending on which selection process is run, the system selects those students who have or have not been awarded aid that applies to SAP, and all sessions to be considered must be passed. The system creates a SAP contact with an expected status for all selected students.
2. Process selected students for SAP compliance. The system updates the SAP contact status to completed and creates a SAP action contact with an expected status for each student requiring action. The system also updates the SAP and Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen. For more information, see the *Financial Aid Need Analysis User Guide*.
3. Perform the defined action for each student who has a SAP action contact with an expected status. The system selects those students with a SAP action contact with an expected status, performs actions on the students based on values in the Financial SAP Action table (fasapact_table), and updates the status to completed. Actions taken can include holding certain aid, creating letters, or notifying advisors. Creating letters and notifying advisors is simplified by creating a contact for the appropriate letter or reports, which you can produce for those students who have the contact.

Note For more information about using contacts to create letters and to notify advisors, see the *Communications Management User Guide*.

Selecting Awarded Students to Be Processed for SAP

Follow these steps to select awarded students to be processed for SAP.

1. From the Financial Aid: SAP Processing menu, select the menu option Select FA Awarded SAP IDs. The Select FA Awarded SAP IDs screen appears.

Note Do not use the same Resource for Awarded and Unawarded students.

2. Change the parameters, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: SAP Processing menu reappears.

Note For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.

If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have been awarded aid that applies to SAP and adds the SAP contact with an expected status to those records it finds. After the system completes the process, it sends you email

informing you if it completed successfully and the name of the file in your home directory that provides additional information.

Note If you want to see a list of those students who had the SAP contact added to their records, see *Creating the Contact Status Report by Contact Resource* in this section.

Selecting Unawarded Students to Be Processed for SAP

Follow these steps to select unawarded students to be processed for SAP.

1. From the Financial Aid: SAP Processing menu, select the menu option Select FA Unawarded SAP IDs. The Select FA Unawarded SAP IDs screen appears.

Note Do not use the same Resource for Awarded and Unawarded students.

2. Change the parameters, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: SAP Processing menu reappears.

Note For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.

If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have been awarded aid that applies to SAP and adds the SAP contact with an expected status to those records it finds. After the system completes the process, it sends you email informing you if it completed successfully and the name of the file in your home directory that provides additional information.

Note If you want to see a list of those students who had the SAP contact added to their records, see *Creating the Contact Status Report by Contact Resource* in this section.

Processing Selected Students for SAP Compliance

The SAP Compliance process uses stored procedures in which to process students.

The three stored procedures that are recommended as “Best Practices” for financial aid are as follows:

- sapcumhrs
- sapcurhrs
- sapgpa

There are three financial aid stored procedures that can also be used if the institution wants to update the stufa_rec. They are as follows:

- fasapcumhrs
- fasapcurhs
- fasapgpa

The sapcumhrs, sapcurhrs and sapgpa stored procedures will populate results in the sap_rec. Each stored procedure will return a Yes/No value based on whether the student meets the requirements defined within the stored procedure.

Each school will have different requirements for meeting SAP requirements, so these stored procedures are provided with basic requirements and are expected to be modified for each institution's needs.

Once the stored procedures are setup, follow these steps to process selected students to be processed for SAP compliance.

Note If your institution creates multiple SAP tracks and SAP action contacts, run this process for each track and contact. For example, Awarded and Unawarded students use different contacts and need different tracks, so use the appropriate value for processing those students.

1. From the Financial Aid: SAP Processing menu, select the menu option SAP Compliance Process. The SAP Compliance Process screen appears.
2. Enter the appropriate information in the following fields. Change the other parameters, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
 - Resource
 - SAP Track
 - SAP Compliance Criteria
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students with an expected SAP contact, updates it to completed, and adds a SAP action contact with an expected status for each student requiring action. The system also updates the SAP and Prev SAP fields on the Need Analysis Information segment of the Need Analysis Information screen. After the system completes the process, it sends an email informing you if it completed successfully and lists the ID numbers that were processed.
 - For more information about the Need Analysis Information screen, see the *Financial Aid Need Analysis User Guide*. If you want to see a list of those students who had the SAP action contact added to their records, see *Creating the Contact Status Report by Contact Resource* in this section.

Example of SAP Compliance Process Parameters

The following parameters can be used to process SAP compliance:

Resource	Tickler	FA Yr	Session	Year	Prog	Track	Criteria	PASS	FAIL	Contact
SELCTSAP	FY11	1112	FA	2011	UNDG	FINAID	GEN	PASS	FAIL	SAPACTIN

Performing SAP Actions

The SAP Action process performs the following actions for each student who does not meet SAP:

- Selects the students with a SAP action contact with an Expected status
- Performs actions on the students' records based on values in the SAP Action table

Actions taken can include, for example, holding certain aid, creating contacts for letters, updating the current SAP status, adding more contacts, or updating other fields on the system.

How to Perform SAP Actions

Follow these steps to perform the necessary SAP actions for selected students.

Note If your institution creates multiple SAP tracks and SAP action contacts, run this process for each track and contact. For example, Awarded and Unawarded students use different contacts and need different tracks, so use the appropriate value for processing those students.

1. From the Financial Aid: SAP Processing menu, select the menu option SAP Action Process. The SAP Action Process screen appears.
2. Enter the appropriate information into the following fields. Change the other parameters, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
 - Resource
 - SAP Track
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students with an expected SAP action contact, performs the actions based on values in the Financial SAP Action table (fasapact_table), and updates the contact status to completed. After the system completes the process, it sends you email informing you if it completed successfully and what action was taken for each student.

Running Reports After SAP Actions

You can run the Contact Status report and the SAP Listing report after the SAP Action process completes to view the changes resulting from the SAP Actions. When you run the Contact Status report to view the changes, use the SAP Action contact rather than the SAP Selection contact.

Creating the Contact Status Report by Contact Resource

After you select students to be processed for SAP and process them for SAP compliance, you can produce a list of students whose records the system updated by creating the Contact Status Report by Contact Resource. Follow these steps to create the report.

1. From the Financial Aid: SAP Processing menu, select the menu option Contact Range. The Contact Range screen appears.
2. Enter the name of the contact (i.e., the SAP contact or the SAP action contact) in the First and Second fields, using the same contact (e.g., SELCTSAP) in both fields. Select **Finish**. The Output Parameters and Scheduling window appears.

Ensure E appears in the Status field to include the students who had the contact added to their records.

3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for those students who have the contact you specified with an expected status and creates the report. After the system completes the process, it sends you email informing you if it completed successfully. If you sent the report to a file, it includes the name of that file in your home directory.

Creating a SAP Listing Report

After the SAP Compliance process, you can run the SAP Listing report to determine which students passed or failed the criteria used in that process. You can also create a list of students with a specified SAP status to verify students' SAP statuses after you complete the SAP Action process. Follow these steps to create the SAP Listing report.

1. From the Financial Aid: SAP Processing menu, select the menu option SAP Listing. The SAP Listing screen appears.
2. Enter the appropriate information in the fields, and select **Finish**. The Output Parameters and Scheduling window appears.
3. Change the fields on the window so the program executes according to your needs and select **Finish**. The Financial Aid: SAP Processing menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for those students who match the criteria you specified and creates the report. After the system completes the process, it sends you email informing you if it completed successfully. If you sent the report to a file, it includes the name of that file in your home directory.
 - If you run this report after the SAP Action process is completed, the students will have a SAP code based on the SAP Action table.



Refunding Financial Aid

This section provides information and step-by-step procedures to follow when you:

- Refund financial aid using ID numbers
- Create refund contacts and calculate fees in students' accounts
- Create reports listing students who have been selected to have refund checks produced
- Post refundable aid from the Student Accounts (S/A) to the Student Refunds (S/R)
- Manually enter updates/corrections to students' refunds
- Create check register reports

Note You can use these procedures only if your institution refunds unused financial aid to students, if the system is set up to utilize the Refundable Aid processes, and if the student has refundable aid awarded.

Before You Begin

Before you begin to use the following procedures for refunding aid, remember:

- For the Refundable Aid processes to function correctly, all of the following products must be set up on CX. Check with your Jenzabar coordinator to verify that these processes are available:
 - Financial Aid Posting
 - Fee Collection
 - Third Party Billing
- The student must have the following records existing on the system:
 - ID record
 - Program Enrollment record
 - Student Academic record
 - Student services record
 - Subsidiary Account record
 - Financial Aid record
- The student's financial aid must be posted.

For more information about posting financial aid by running the Post Financial Aid process, see the *Student Billing User Guide*.

- Cashier and Fee Collection should be run on the student.
For more information about running the Cashier and Fee Collection processes, see the *Cashier User Guide* and the *Fee Collection User Guide*.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the screens.

Refunding Aid Using ID Numbers or Contacts

Your institution has the option to refund financial aid either using ID numbers or contacts. To refund aid using ID numbers, the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) must be enabled. To use contacts, enable the Refund by Contact macro (ENABLE_FEAT_RFND CTC). In addition, your Jenzabar coordinator must perform some further system modifications.

Group Award Periods

The Refundable Aid processes in the standard CX are designed to be executed for groups of students who have been awarded financial aid during a time period as determined by your institution (e.g., May 15 through May 31). The institution's specified time period for a group of students is called a Group Award Period (GAP).

Required Table Entries

If your institution refunds financial aid using contacts, the following tables must contain specific entries for the Refundable Aid processes to work properly.

- The Contact table (ctc_table) must contain a series of entries with a numbered suffix for financial aid check refunds (e.g., FACHKXXX). The suffix of each refund entry must correspond to an associated Group Award Period (GAP) number. For example, FACHK001 would correspond to financial aid refund checks for GAP 001.
- The Tickler table (tick_table) must contain the tickler code, RFND, which is used specifically for the Refundable Aid processes.

Refundable Aid Menu

Following are the menu options available on the Refundable Aid menu and any sub-menu options including a brief description of each.

Financial Aid Entry

Accesses Financial Aid Entry program when you need to access the Refunds screen to manually modify students' refund amounts.

Post Refunds-Contacts

This is the second step in the Refundable Aid processes to refund aid using contacts. Posts refundable financial aid from the Student Accounts (S/A) to the

Student Refunds (S/R) for every contact added when you run the Refund-Contacts process.

Note This menu option is only available if the Refund by Contact macro (ENABLE_FEAT_RFND_CTC) is enabled.

Post Refunds-ID

This is the second step in the Refundable Aid processes to refund aid for specific ID numbers. Posts refundable financial aid from the Student Accounts (S/A) to the Student Refunds (S/R) for the ID number you specify or for all qualifying ID numbers.

Note This menu option is only available if the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) is enabled.

Refund-Contacts

This is the first step in the Refundable Aid processes to refund aid using contacts. Creates contacts for students who are to receive a refund. Also runs the Batch Fee Calculation process for all students with refund contacts.

Note You must enter the same contact and tickler for each disbursement with the same aid, site (if applicable), session, year, and refund percentage. This menu option is only available if the Refund by Contact macro (ENABLE_FEAT_RFND_CTC) is enabled.

Refund-ID

This is the first step in the Refundable Aid processes to refund aid for specific ID numbers. Refunds unused financial aid for the ID number you specify or for all qualifying ID numbers. Also runs the Batch Fee Calculation for the ID number you specify or for all qualifying ID numbers.

Note This menu option is only available if the Refund by ID Number macro (ENABLE_FEAT_RFND_ID) is enabled.

Reports Menu

Accesses the Refundable Aid: Reports menu. The sub-menu options are described below:

- Enrollment Variance-Fund – Generates a variance report for up to three aid codes similar to the Refund Eligible-Fund process but provides additional variance information. Can also be run before the Refund-Contacts process to preview the list of contacts the system will create.
- Refund Eligible-Fund – Generates a proof list report (Expected Refund Proof List) of eligible refundable aid checks for the specified tickler and resource codes, sorted by aid.
- Refund Eligible-Student – Generates a proof list report (Expected Refund Proof List) of eligible refundable aid checks for the specified tickler and resource codes, sorted by ID number.
- Refund Check-Fund – Generates a check register of refundable aid checks, sorted by aid.
- Refund Check-Student – Generates a check register of refundable aid checks, sorted by ID number.

Process to Refund Financial Aid Using ID Numbers

The following list shows the general phases that take place before, during, and after you run the Refunding Aid processes to refund financial aid using ID numbers.

1. Access the Refundable Aid menu from the Financial Aid: Student Processing menu.
2. Select the menu option Refund-ID, make appropriate entries, and execute the process.
3. Select the menu option Reports Menu to access the Refundable Aid: Reports menu.
4. Select the following menu options to create the Expected Refund Proof List report:
 - Refund Eligible-Fund (sorted by aid)
 - Refund Eligible-Student (sorted by ID number)
5. Use the reports to verify that the refund information was correct. Determine those students who should:
 - Not receive a check
 - Receive a greater or lesser refund amount
6. For those students who you identified above, access the Financial Aid: Document Tracking menu and select the menu option Contact Entry/Display. For each student, select **Auto-Mode**, perform a query, and access the student's Contacts window. Change the refund contact status to one of the following. When completed, select **Finish**.
 - C (Completed) – For students receiving greater or lesser refund amounts
 - V (Voided) – For students not receiving refunds
7. Return to the Refundable Aid menu and select the menu option Post Refunds-ID. Make appropriate entries and execute the process.
8. For those students who should receive greater or lesser refund amounts, access Financial Aid Entry and enter parameters for updating financial aid information. For each student, perform a query, access the Award Disbursements screen, then access the Refunds screen. Set the student's refund amount and select **Finish**. When completed, exit from Financial Aid Entry.
9. Return to the Refundable Aid: Reports menu and select the following menu options to create reports. The reports list the students receiving refunds and the total amounts being refunded from each financial aid program.
 - Refund Check-Fund (sorted by aid)
 - Refund Check-Student (sorted by ID number)
10. Submit the reports to your institution's Business office.

Process to Refund Financial Aid Using Contacts

The following list shows the general phases that take place before, during, and after you run the Refunding Aid processes to refund financial aid using contacts.

1. Access the Refundable Aid menu from the Financial Aid: Student Processing menu.
2. Select the menu option Refund-Contacts, make appropriate entries, and execute the process.
3. Select the menu option Reports Menu to access the Refundable Aid: Reports menu.
4. Select the following menu options to create the Expected Refund Proof List report:
 - Refund Eligible-Fund (sorted by aid)
 - Refund Eligible-Student (sorted by ID number)
5. Use the reports to verify that the refund information was correct. Determine those students who should:
 - Not receive a check
 - Receive a greater or lesser refund amount
6. For those students who you identified above, access the Financial Aid: Document Tracking menu and select the menu option Contact Entry/Display. For each student, select **Auto-Mode** perform a query and access the student's Contacts window. Change the refund contact status to one of the following. When completed, select **Finish**.
 - C(ompleted) – For students receiving greater or lesser refund amounts.
 - V(oided) – For students not receiving refunds.
7. Return to the Refundable Aid menu and select the menu option Post Refunds-Contacts. Make appropriate entries and execute the process.
8. For those students who should receive greater or lesser refund amounts, access Financial Aid Entry and enter parameters for updating financial aid information. For each student, perform a query, access the Award Disbursements screen, then access the Refunds screen. Set the student's refund amount and select **Finish**. When completed, exit from Financial Aid Entry.
9. Return to the Refundable Aid: Reports menu and select the following menu options to create reports. The reports list the students receiving refunds and the total amounts being refunded from each financial aid program.
 - Refund Check-Fund (sorted by aid)
 - Refund Check-Student (sorted by ID number)
10. Submit the reports to your institution's Business office.

Refunding Financial Aid Using ID Numbers

Follow these steps to refund financial aid using ID numbers.

1. From the Refundable Aid menu, select the menu option Refund-ID. The Refund-ID screen appears.
2. Enter the necessary information in the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

Generally, you enter **0** (zero) in the ID# field to process all qualifying students.
3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who meet the criteria you specified and runs the Batch Fee Calculation for those students it finds. After the system completes the process, it sends you email informing you if it completed successfully.

Creating Refund Contacts

Follow these steps to create refund contacts for students in a GAP.

1. From the Refundable Aid menu, select the menu option Refund-Contacts. The Refund-Contacts screen appears.
2. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

You must enter the same contact (e.g., FACHK001) and tickler (i.e., RFND) for each disbursement with the same aid, site (if applicable), session, year, and refund percentage.
3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who meet the criteria you specified, runs the Batch Fee Calculation, and adds the refund contact with an expected status to those records it finds. After the system completes the process, it sends you email informing you if it completed successfully.

Updating Refund Contact Statuses for Individual Students

For those students who should not receive a check or who should receive either a greater or lesser refund amount, you must manually update the refund contact status. To determine who those students are, you must first create the Expected Refund Proof List report. You can create the report in two formats: the Refund

Eligible-Fund sorts the information by aid and the Refund Eligible-Student sorts it by ID number.

After you review the reports and ascertain those students whose refund contact status should be updated, you access the students' Contact records and change the refund contact status to one of the following:

- C(ompleted) – For students receiving greater or lesser refund amounts
- V(oided) – For students not receiving refunds

How to Create the Expected Refund Proof List Reports

Follow these steps to create both formats of the Expected Refund Proof List reports you use to determine those students whose refund contact status should be updated.

1. From the Refundable Aid menu, select the menu option Reports Menu. The Refundable Aid: Reports menu appears.
2. Select the menu option Refund Eligible-Fund. The Refund Eligible-Fund screen appears.
3. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

You must enter the refund contact in the Resource field.

4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid: Reports menu reappears.

If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who have the refund contact with an expected status in their Contact records and creates the report (sorted by aid). After the system completes the process, it sends you email informing you if it completed successfully.

5. Select the menu option Refund Eligible-Student. The Refund Eligible-Student screen appears.
6. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

You must enter the refund contact in the Resource field.

7. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid: Reports menu appears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who have the refund contact with an expected status in their Contact records and creates the report (sorted by ID number). After the system completes the process, it sends you email informing you if it completed successfully.

How to Update Refund Contact Statuses

Review the two Expected Refund Proof List reports to determine if students exist who:

- Should not receive a check but have Contact records indicating they should receive a check
- Should receive a refund check for greater or lesser than the batch process percentage

If there are students who meet one or both of the criteria above, follow these steps to manually update the refund contact statuses for those students.

1. From the Financial Aid: Documentation Tracking menu select the menu option Contact Entry/Display. The Contact Entry/Display screen appears.
2. Enter the appropriate financial aid award year and select **Finish**. The Contact Entry screen appears.
3. Select Auto-Mode.
4. Enter the student's ID number from the report, and select **Select**. The student's data appears.
5. Select **Detail**. The Detail window appears.
6. Select **Contacts**, then **OK**. The Contact Entry window appears in Update mode.
7. Locate the refund contact (e.g., FACHK001). You can use **Back** and **Forward** to move backward and forward one full screen of data, or you can use the <**Arrow**> keys to move one line at a time.
8. Press <**Tab**> to move the cursor to the Stat field, and change the status value to one of the following codes:
 - C(ompleted) – For students receiving greater or lesser refund amounts
 - V(oided) – For students not receiving refundsFor all students for whom you set the Contact status to C, you must manually set the refund amount in the Refunds screen from Financial Aid Entry. For more information, see *Manually Setting Refund Amounts* in this section.
9. Select **Finish**. The Contact Entry window disappears.
10. Select **Finish**.
11. Do you need to update another student's refund contact status?
 - If yes, go to step 4.
 - If no, select **Cancel**, then select **Exit**. The message "Are you sure you want to exit?" appears.
12. Select **Yes**. The Financial Aid: Document Tracking menu reappears.

Posting Refundable Financial Aid

This section provides two procedures for posting refundable financial aid: one if your institution uses ID numbers to refund financial aid and one if your institution uses contacts.

Note You must run either the Refund-ID or the Refund-Contacts process, depending on what your institution uses to refund financial aid, before you run either of these procedures.

How to Post Refundable Financial Aid Using ID Numbers

Follow these steps to refund financial aid using ID numbers.

1. From the Refundable Aid menu, select the menu option Post Refunds-ID. The Post Refunds-ID screen appears.

2. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

You can enter multiple financial aid codes to process more than one aid program. If you enter more than one code, separate each with a comma. The number you enter in the Percentage field determines the amount to be moved/posted to the Student Refunds (S/R). For example, if you make two payments in a term-percentage, enter **50** as the first payment. Then the next time you run the process, enter **100** to refund the remaining amount.

3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system posts the refundable financial aid for those students to the Student Refunds (S/R). After the system completes the process, it sends you email informing you if it completed successfully.

How to Post Refundable Financial Aid Using Contacts

Follow these steps to refund financial aid for students in a GAP using contacts.

1. From the Refundable Aid menu, select the menu option Post Refunds-Contacts. The Post Refunds-Contacts screen appears.
2. Enter the necessary information in the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.

You can enter multiple financial aid codes to process more than one aid program. If you enter more than one code, separate each with a comma. You must enter the refund contact in the Resource field.

3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid menu reappears.

For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.

If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system does the following:

- 1) Searches the database for all students who have the refund contact with an expected status in their Contact records.
- 2) Updates the contact status to completed.
- 3) Posts the refundable financial aid for those students to the Student Refunds (S/R).

After the system completes the process, it sends you email informing you if it completed successfully.

Manually Setting Refund Amounts

You must manually set the refund amount in the Refunds screen from Financial Aid Entry for all students for whom you set the Contact status to C (Completed) in the procedure *How to Update Contact Statuses*. For more information, see *Updating Refund Contact Statuses for Individual Students* in this section.

Follow these steps to manually set the refund amount for individual students.

1. From the menu, select the menu option Financial Aid Entry, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.
3. Do you know the student’s ID or Social Security number?
 - If yes, enter the number in the ID field and select **Finished**.
 - If no, select **Query** to perform a query.
4. The system loads the student’s financial aid information and verifies compliance.

You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions entered in the Award Session(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution’s fiscal calendar in the Fiscal Calendar record (fscf_cal_rec).

5. Select **Disbursed**. The Award Disbursements screen appears.
6. Select **Refund**. The Refunds screen appears.

If the Business office posted refundable aid to the student, the screen appears in Update mode with the cursor in the Applied field.

7. Increase the amount appearing in the Applied field by the amount of the refund you want the student to receive. For example, if the student has a \$1000.00 Pell award, \$100.50 in fees have been applied against it, and you want the student to receive a refund of \$500.00, you would enter \$600.50.

8. Select **Finish**. The Transfer Monies window appears with the cursor in the Payment Due Date field.
9. Enter the date by which the payment should be made to the student in the Payment Due Date field and select **Finish**. The Refunds screen reappears, and the system enters the appropriate values in the Aid, Ref Amt, and Due Date fields on the right side of the screen.

You can also change the amount of the refund by changing the amount in the Payment Amount field.

10. Do you want to change the due date by which the check should be written or schedule multiple payments to be made to the student on different dates for the same refund?
 - If yes, select **Switch Sides**. The cursor moves to the Due Date field. Enter the new due date, if necessary. Go to step 10.
 - If no, go to 15.

Ensure the cursor appears on the row for which you want to change the due date or schedule multiple payments.

11. Do you want to schedule multiple payments to be made to the student on different dates for the same refund?
 - If yes, select **Split** and the Split Payment window appears. Go to step 11.
 - If no, go to 13.

12. Enter the amount of the first payment in the Ref Amt field and press <Tab> to move the cursor to the Due Date field. Enter the due date for the first payment.

13. Select **Add-Payment** and enter the amount of the next payment. Press <Tab> to move the cursor to the Due Date field. Enter the due date for the next payment.

The system recalculates each new payment based on the total refund to be made less each payment you enter. Repeat this step for each payment to be made until the total payments equals the total amount of the refund.

14. Select **Finish**. The Refunds screen reappears, and the system enters the appropriate values in the Aid, Ref Amt, and Due Date fields on the right side of the screen for each payment to be made.

15. Do you want to refund another aid type?
 - If yes, select **Switch Sides**, and the cursor moves to the Applied field. Press <Tab> to move to the next aid type and go to step 6.
 - If no, go to 15.

16. Select **Finish**. The Award Disbursements screen reappears.

17. Select **Close**. The Financial Aid Entry Screen reappears.

18. Do you want to manually set the refund amount for another student?
 - If yes, select **Query** and go to step 3.
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears.

19. Select **Yes**. The menu reappears.

Creating Refund Check Register Reports

You create a check register report to give to your institution's Business office, which uses them to print the required refund checks. You can create the check register in two formats: the Refund Check-Fund sorts the information by aid and the Refund Check-Student sorts it by ID number.

Follow these steps to create both formats of the check register which you submit to your institution's Business office.

1. From the Refundable Aid menu, select the menu option Reports Menu. The Refundable Aid: Reports menu appears.
2. Select the menu option Refund Check-Fund. The Refund Check-Fund screen appears.
3. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid: Reports menu reappears.

If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who match the criteria you specified and creates the report (sorted by aid). After the system completes the process, it sends you email informing you if it completed successfully.

5. Select the menu option Refund Check-Student. The Refund Check-Student screen appears.
6. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
7. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Refundable Aid: Reports menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for all students who match the criteria you specified and creates the report (sorted by ID number). After the system completes the process, it sends you email informing you if it completed successfully.
8. When you have the reports, submit them to the Business office which prints the refund checks following its normal check production process.

If you processed more than one GAP (e.g., FACHK001 through FACHK005), the check processing system cannot distinguish among the groups. The system creates all the checks as one group. If necessary, separate the checks into the appropriate groups, then using the reports, separate the checks into the appropriate GAPs.



Financial Aid Comments

This section provides information and step-by-step procedures to follow when you:

- Display a comment associated with a student's financial aid
- Add a comment associated with a student's financial aid
- Update a comment associated with a student's financial aid
- Delete a comment associated with a student's financial aid
- Print a comment associated with a student's financial aid

Before You Begin

Before you begin to use the following procedures for financial aid comments, remember:

- An ID record for the student must already exist on the system.
- The student does not have to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the Comments screen.

Process

The following list shows the general phases that take place before, during, and after editing and printing comments associated with financial aid records.

1. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information.
2. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
3. Use the **Text** command to access the Comments screen.
4. View, add, update, and/or delete any comment associated with the student's financial aid.
5. Exit from Financial Aid Entry.
6. Access the Print Text Comments screen to print the comments, if necessary.

Adding Financial Aid Comments

Follow these steps to add financial aid comments.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, select **Text**. The Comments screen appears.
2. Click on the Comments button to display the blob text window.
3. Enter your comments in the blob text window.

Jenzabar recommends that you enter your name and date after the comments.

4. Select **File** from the menu bar of the blob text window, then select **Update and Exit**. The Comments screen reappears, and the first line of the comment appears on the Comments button.
5. Select **Finish**. The Financial Aid Entry screen reappears.

Note After you enter a comment, the word TEXT appears highlighted to the left of the Rev field on the Financial Aid Entry screen.

Updating Financial Aid Comments

Follow these steps to update financial aid comments.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records. If a comment exists for the student, the word TEXT appears highlighted to the left of the Rev field on the Financial Aid Entry screen.

1. From the Financial Aid Entry screen, select **Text**. The Comments screen appears.
2. Click on the Comments button to display the blob text window.
3. Update the comments in the blob text window.

Jenzabar recommends that you enter your name and date after the comments.

4. Select **File** from the menu bar of the blob text window, then select **Update and Exit**. The Comments screen reappears, and the first line of the comment appears on the Comments button.
5. Select **Finish**. The Financial Aid Entry screen reappears.

Deleting Financial Aid Comments

Follow these steps to delete financial aid comments.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records. If a comment exists for the student, the word **TEXT** appears highlighted to the left of the Rev field on the Financial Aid Entry screen.

1. From the Financial Aid Entry screen, select **Text**. The Comments screen appears.
2. Click on the Comments button to display the blob text window.
3. Highlight the comment(s) you want to delete, select **Edit** from the menu bar on the blob text window, then select **Delete**.

CAUTION

Jenzabar recommends using caution when deleting comments as you may lose important information.

4. Select **File** from the menu bar of the blob text window, then select **Update and Exit**. The Comments screen reappears, and the first line of the comment appears on the Comments button.
5. Select **Finish**. The Financial Aid Entry screen reappears.

Printing Financial Aid Comments

Follow these steps to print financial aid comments.

1. From the Financial Aid: Student Processing menu, select the menu option Print Text Comments. The Print Text Comments window appears.
2. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.

If you want to print one student's comments, enter the same ID number in both the Beginning ID# and Ending ID# fields. If you want to print the comments for a range, enter different ID numbers in the fields.

3. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Financial Aid: Student Processing menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. The system searches the database for the ID number(s) you specified. After the system completes the process, it sends you email informing you if it completed successfully.



Financial Aid Transcripts

This section provides information and step-by-step procedures to follow when you:

- Update a student's financial aid transcript
- Update a student's financial aid loan history
- Print financial aid transcripts

Before You Begin

Before you begin to use the following procedures for updating and printing financial aid transcripts, remember:

- An ID record for the student must already exist on the system.
- The student's Historical Aid records must be completed as necessary. For more information, see the section *Managing Students' Financial Information* in this guide.
- You cannot print blank financial aid transcript forms.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the screens.

Customizing the Transcript

Your institution should customize the transcript form to display the Financial Aid director's name and your institution's name and address. Although Jenzabar does not recommend making any other changes to the transcript form, your institution can change other items on the form.

While federal law requires that the financial aid transcripts display Title IV aid, your Financial Aid office can determine the other aid codes to print on the transcript. For example, your Financial Aid office may also want other aid codes to print, such as Health Education Assistance, Nursing, and Health Professions loans.

Note Financial Aid transcripts are normally customized during implementation of CX. See your Jenzabar coordinator if you wish to modify the setup of the financial aid transcript.

What Prints on the Transcript

The Aid table (aid_table) controls what financial aid awards will print on the financial aid transcript. Your Financial Aid office, when adding or updating an aid code in the Aid table, can indicate whether to print the financial aid on the transcript by entering **Y**(es) or **N**(o) in the Print on FA Trans field.

Transcript Printing Order

The Aid table (aid_table) determines the order in which awards print on the transcript. Your Financial Aid office can change the order in which the financial aid appears on the transcript in the Section D Order field. This also controls the print order of financial aid categories in Section D of the transcript form. You can enter financial aid in six categories to indicate which Aid code or codes correspond to the following aid programs:

- 1 – PELL
- 2 – SEOG
- 3 – PERK/NDSL
- 4 – ICL (Income Contingent Loan)
- 5 – SSIG (optional)
- 6 – OTHER (e.g., HEAL, Nursing Loans, or HPSL)

When your institution has more than one aid code that corresponds to a category above, you can enter the same print order number for more than one aid code. The transcript displays a total of all amounts awarded to a student for all of the aid codes.

Loan History

The system creates a separate Loan record for each period and loan amount combination that you enter in the Financial Aid Transcript Loan History screen. A student can have multiple Loan records, if necessary. The system prints the student's borrowing history in Section E of the transcript. After you create Financial Aid Transcript Loan History records, you do not have to re-enter the records every year. The system considers the Financial Aid Loan records as permanent and retains the records from year to year.

Process

The following list shows the general phases that take place before, during, and after you update and print transcripts:

1. Your institution customizes the format of the transcript.
2. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information.
3. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
4. Select **Fa-Trans** to access the Financial Aid Transcript Information screen and add/update the student's financial aid transcript information.
5. If necessary, select **Loans** to access the Financial Aid Transcript Loan History screen and add/update historical financial aid information.
6. Print financial aid transcript(s).

Updating a Student's Financial Aid Transcript

Follow these steps to update a student's financial aid transcript.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, select **Fa-Trans**. The Financial Aid Transcript Information screen appears.
2. Select **Update**. The cursor appears in the Prev Name field.
3. Enter or change the necessary information in the appropriate fields. Press **<Tab>** to move to each field, if necessary.
4. Select **Finish** to accept your field entries.
5. Select **Close** to return to the Financial Aid Entry screen.

Updating a Student's Financial Aid Loan History

Follow these steps to update a student's financial aid loan information.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, select **Fa-Trans**. The Financial Aid Transcript Information screen appears.
2. Select **Loans**. The Financial Aid Transcript Loan History screen appears.
3. Select **Update**. The screen goes into Update mode and one loan area becomes active.
4. Is the loan area that you want to update active?
 - If yes, go to step 5.
 - If no, select **Section** until the loan area that you want to update becomes active.
5. Enter or change the necessary information into the appropriate fields.
6. Do you want to update another loan area?
 - If yes, go to step 4.
 - If no, go to step 7.
7. Select **Finish**.
8. Select **Close** to return to the Financial Aid Transcript Information screen.

If you select **Cancel** to return to the Financial Aid Transcript Information screen, the message: "Abort all loan updates (Y/N)?" appears.

 - If you select **Y**, the system does not save any of your changes
 - If you select **N**, the system saves your changes
9. Select **Close** to return to the Financial Aid Entry screen.

Printing Financial Aid Transcripts

Follow these steps to print financial aid transcripts.

- If your Financial Aid office has a dedicated printer with the form type set to *fatran*, the transcript prints immediately. If you need to set the form type to *fatran*, see *Setting Financial Aid Transcript Form Type to Print* in this section.
 - This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records. The financial aid transcript is designed to print on standard paper.
1. From the Financial Aid Entry screen, select **Fa-Trans**. The Financial Aid Transcript Information screen appears.
 2. Select **Output** and the message, “Print Financial Aid Transcript form (Y/N)?” appears.
 3. Select **Yes**. The message “Printing Financial Aid Transcript” appears in the comment line.
 4. Select **Close** to return to the Financial Aid Entry screen.

Setting Financial Aid Transcript Form Type to Print

Follow these steps to set the financial aid transcript form type on a printer.

Note Jenzabar recommends that your Financial Aid office obtain its own dedicated printer to print financial aid transcripts. This allows you to load your institution’s financial aid transcript form into the printer so you do not have to depend on the Computer Center to print the form.

1. From any screen, select the menu option Utility Menu. The Utilities: Main menu appears.
2. Select the menu option Printer Control. The Utilities: Printer Control menu appears.
3. Select the menu option Display Spooler Status. The Display Spooler Status screen appears.
4. Enter the name of the dedicated printer and select **Finish**. A spooler status report appears displaying all forms queued to print and the associated form types. This information is prefaced by the message “Spooler Status Report for ‘printer name’.”
5. When you finish viewing the spooler status, press <Enter>. The Utilities: Printer Control menu reappears.
6. Select the menu option Load Form Type. The Load Form Type screen appears.
7. Enter the name of the dedicated printer in the Printer field and the form type (i.e., *fatran*) in the Output Form Type field. Press <Tab> to move to each field, if necessary.

8. Select **Finish**, then press <**Enter**>. The Utilities: Printer Control menu appears.
9. Load the blank paper into the dedicated printer and align the form.
10. Select the menu option Start Printer to cause the printer to start printing. The Start Printer screen appears.
11. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press <**Enter**>. The printer begins to print.
12. Are you finished printing financial aid transcript forms?
 - If yes, select the menu option Clear Form Type and go to step 13.
 - If no, go to step 3.
13. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press <**Enter**>. The Utilities: Printer Control menu reappears.



Award Notifications

This section provides information and step-by-step procedures to follow when you:

- Immediately print a student's award notification form
- Set the award notification form to print
- Schedule a student's award notification form to print for later batch production
- Select and print award notification forms in a batch process
- Select and print award notification cover letters in a batch process
- Confirm a student's receipt of an award notification form

Before You Begin

Before you begin to use the following procedures for creating and printing award notification forms, remember:

- An ID record for the student must already exist on the system.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the Financial Aid Entry screen.

Using the Output Command

Before you begin to use the following procedures for printing award notification forms using the **Output** command in the Financial Aid Entry screen, remember the following about Contact records:

- After the system formats the award notification form and sends it to a printer, the Financial Aid Entry program does the following to the student's records:
 - Updates the package status (Pkg field) to P (Pending student acceptance).
 - Increments the award notification form revision number.
 - Adds a contact for the award notification cover letter and a contact for the receipt of a signed award notification, each with an expected status.

Note The system only performs these updates when the following is true:

- The Contact table (ctc_table) contains entries for the contact and the revision number of the award notification form.
- The system is configured to automatically add contacts for the award notification form used.

Using the Schedule Command

Before you begin to use the following procedures for printing award notification forms using the **Schedule** command in the Financial Aid Entry screen, remember the following about Contact records:

- The system adds a contact for the award notification cover letter and a contact for the receipt of a signed award notification, each with an expected status, when you run the Select Award Notices process.
- The Select Award Notices process updates the status of the scheduled contact (e.g., ANFORM01) for the award notification form created when you selected the **Schedule** command in Financial Aid Entry.

Cover Letter Contacts

Depending on how your institution sets up CX, you have the following two options when creating cover letter contacts:

- Add a cover letter contact with each award notification form printed
- Add a cover letter contact with the production of the initial award notification form

Contact your account manager at Jenzabar if you need additional information.

Document Tracking System Processes

The Financial Aid Document Tracking system automatically tracks a maximum of two award notification forms printed for students and tracks cover letters and receipt of signed award notifications. You are not limited to using only two award notifications, but the Document Tracking system does require further manual processes.

Financial Aid Entry Program Parameters Screen

Before you begin to use the procedures for printing award notification forms, remember the following about the Financial Aid Entry Program Parameter screen:

- Financial aid information entered for the specified award year and sessions print on the award notification form.
- To print a return date on the award notification form, you must enter a date in the Return Date field. This date represents the date by which the student must return the award notification form to secure the awards.
- The Financial Aid Entry program uses the Schedule Date field when you use the **Schedule** command on the Financial Aid Entry screen to schedule award notification forms for future batch printing. The program does not use the field when you use the **Output** command on the Financial Aid Entry screen.

Cumulative History Entry

When you enter cumulative history information, you can print award notification forms, but you cannot schedule them. The printing process differs in the following ways:

- No increments to revision numbering
- No upgrades to the package status (Pkg field) from I (Intended package) to P (Pending student acceptance)

Note Your institution should have little or no need to use the print process in conjunction with entering cumulative history information.

Process

The following list shows the general phases that take place before, during, and after printing award notification forms.

1. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information. If entering award history, select **Cumulative History**.

Note When you access Financial Aid Entry, set the award year, session(s), and output form to be used for the award notification forms on the Financial Aid Entry Program Parameters screen. If you are already using Financial Aid Entry, use the **Initialize** command to set these parameters.

2. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
3. If necessary, add/update student financial aid information on the Financial Aid Entry screen.
4. Take one of the following actions:
 - If your Financial Aid office has a dedicated printer to print award notification forms, use the **Output** command to immediately print the forms.
 - Use the **Schedule** command to add a scheduling contact with an expected status to allow for later batch production of award notification forms.
5. Did you use the **Schedule** command to print award notification forms?
 - If yes, exit from Financial Aid Entry and access the Student Processing: Award/Cover Letter menu. Go to phase 6.
 - If no, go to phase 10.
6. Execute the Select Award Notices process to select the students who have the scheduling contact with an expected status.
7. After selecting the award notification forms to print, execute the Print Award Notices process to print the forms in batch mode.
8. Execute the Create Cover Letters process to create and format cover letters for students who have the cover letter contact with an expected status.

9. After creating the award notification cover letters, execute the Print Award/Cover Letters process to print the letters in batch mode.
10. When you receive the signed award notice, confirm the receipt by accessing the Financial Aid Entry screen and updating the package status (Pkg field) value for the student.

Award Notification Form Scheduling Process

The following list describes the process the system performs when you schedule award notification forms with the **Schedule** command on the Financial Aid Entry screen.

1. The system adds a scheduled contact with an expected status to the student's Contact record.
2. The Select Award Notices process searches for the scheduled contact with an expected status.
3. The system selects students who were scheduled for printing on or before the schedule date.
4. When the Select Award Notices process finishes, the system sends you an email message informing you if it successfully completed. If so, you can print the award notification forms.

Note If the email message contains any errors, contact your Jenzabar coordinator.

Immediately Printing an Award Notification Form

Follow these steps to immediately print an award notification form.

Note The code ANFORM is the default name of your institution's primary award notification form; however, your institution can change this code. You can only print an award notification form for a student whose financial aid records appear on the Financial Aid Entry screen. This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, select **Output**. The message "Print award notice form 'ANFORM' for this student (Y/N) (Ctrl-U Change Form)?" appears in the comment line.
2. Take one of the following actions:
 - If you don't want to print the award notification form, enter **N**. The toolbar reappears and no action occurs.
 - If you want to use ANFORM, enter **Y**. The messages "Loading award notice" then "Printing award notice" appear in the comment line. Go to step 5.
 - If you want to change the form, press **<Ctrl-u>**. The Financial Aid Entry Program Parameters screen appears with the cursor in the Output Form field, and the system prompts you to verify the parameters before printing. Go to step 3.
3. Enter the name of the award notification form you want to use and select **Finish**. The Financial Aid Entry screen reappears, and the message "Print

award notice form '*form name*' for this student (Y/N) (Ctrl-U Change Form)?" appears in the comment line, where *form name* is the name of the new award notification form you want to use.

4. Enter **Y**. The messages "Loading award notice" then "Printing award notice" appear in the comment line.
5. Does your Financial Aid office have a dedicated printer with blank forms loaded, and the printer's form type set to the form type of the award notification form?
 - If yes, the system immediately prints the award notification forms on the printer.
 - If no, see How to Set the Award Notification Form Type in this section.

Note If the award notification form type is not loaded on the printer, or if no form type is loaded on the printer, the award notification forms produced will remain in the printer queue until you change the form type on the printer.

Setting Award Notification Form Type to Print

Follow these steps to set the award notification form type on a printer.

Note Jenzabar recommends that your Financial Aid office obtain its own dedicated printer to print award notification forms. This allows you to load your institution's award notification form into the printer so you do not have to depend on the Computer Center to print the form.

1. From any screen, select the menu option Utility Menu. The Utilities: Main menu appears.
2. Select the menu option Printer Control. The Utilities: Printer Control menu appears.
3. Select the menu option Display Spooler Status. The Display Spooler Status screen appears.
4. Enter the name of the dedicated printer and select **Finish**. A spooler status report appears displaying all forms queued to print and the associated form types. This information is prefaced by the message "Spooler Status Report for '*printer name*'" where *printer name* is the name of the printer you entered.
5. When you finish viewing the spooler status, press <Enter>. The Utilities: Printer Control menu reappears.
6. Select the menu option Load Form Type. The Load Form Type screen appears.
7. Enter the name of the dedicated printer in the Printer field and the form type (i.e., **anform**) in the Output Form Type field. Press <Tab> to move to each field, if necessary.
8. Select **Finish**, then press <Enter>. The Utilities: Printer Control menu appears.
9. Load the blank paper into the dedicated printer and align the form.
10. Select the menu option Start Printer to cause the printer to start printing. The Start Printer screen appears.

11. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press <**Enter**>. The printer begins to print.
12. Are you finished printing financial aid transcript forms?
 - If **yes**, select the menu option Clear Form Type and the Clear Form Type screen appears. Go to step 13.
 - If **no**, go to step 3.
13. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press <**Enter**>. The Utilities: Printer Control menu reappears.

Scheduling Award Notification Forms to Print

Follow these steps to schedule award notification forms for printing.

- The code ANFORM is the default name of your institution's primary award notification form; however, your institution can change this code. When you schedule an award notification form, the system adds a scheduled contact with an expected status to the student's Contact record. The system searches for this contact to print award notification forms in batch mode.
 - You can only schedule an award notification form for a student whose financial aid records appear on the Financial Aid Entry screen. This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.
1. From the Financial Aid Entry screen, select **Schedule**. The message "Print award notice form 'ANFORM' for this student (Y/N/Ctrl-U Change Form)?" appears in the comment line.
 2. Take one of the following actions:
 - If you don't want to print the award notification form, enter **N**. The toolbar reappears and no action occurs.
 - If you want to use the ANFORM, enter **Y**. The messages "Loading award notice" then "Printing award notice" appear in the comment line. Go to step 5.
 - If you want to change the form, press <**Ctrl-u**>. The Financial Aid Entry Program Parameters screen appears with the cursor in the Output Form field and the system prompts you to verify the parameters before printing. Go to step 3.
 3. Enter the name of the award notification form you want to schedule to be used and select **Finish**. The Financial Aid Entry screen reappears, and the message "Print award notice form '*form name*' for this student (Y/N/Ctrl-U Change Form)?" appears in the comment line, where *form name* is the name of the new award notification form you want to schedule to be used.

Note The Schedule Date field in the Financial Aid Entry Program Parameters screen allows you to print award notification forms in different groups. You can use the schedule date to delay printing award notifications for selected students.

4. Enter **Y**. The system adds the scheduling contact to the student's Contact record.

5. Do you want to schedule another award notification form for another student?
 - If yes, select **Query** to find the student and display their financial aid records. Go to step 1.
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
6. Select **Yes**. The menu reappears.

Selecting Award Notification Forms to Print

Follow these steps to select award notification forms to be printed.

Note When you run this process, the system searches for the scheduled contact with an expected status that the system added when you selected the **Schedule** command in Financial Aid Entry. The system then selects award notification forms for those students it finds.

1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
2. Select the menu option Select Award Notices. The Select Award Notice screen appears.
3. Change the fields, if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.

You can include a maximum of four sessions on the same form. The sessions are printed on the form in the order that you enter them.

4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Student Processing: Award/Cover Letters menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have the scheduled contact with an expected status, updates the status to completed, and selects those students to have award notification forms printed. After the system completes the process, it sends you email informing you if it completed successfully.

Printing Award Notification Forms

Follow these steps to print award notification forms.

1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
2. Select the menu option Print Award Notices and select **Finish**. The Print Award Notices screen appears.
3. Select **Formtype**. The cursor advances to the Type of Form field.
4. Enter the type of form that you want to print (i.e., **anform**) and press <Tab> to move the cursor to the Name of Printer field.
5. Enter the name of the printer on which to print the forms and press <Tab> to move the cursor to the Station Number field.
6. Enter the station number (if required) and select **Finish**. The message "Please load the 'anform' forms into '*printer*'" appears, where *printer* is the name of the printer you entered in the Name of Printer field.
7. Load the necessary form type into the printer and select **Loaded**.
8. Select **Start**. The message "Are forms correctly aligned" appears.
9. Do you want to print a test form to ensure the forms are correctly aligned?
 - If yes, select **No**. A test form prints and the message "Are forms correctly aligned" reappears.
 - If no, select **Yes**. The message "Begin printing or Skip this form" appears. Go to step 11.
10. Are the forms correctly aligned?
 - If yes, select **Yes** to continue printing. The message "Begin printing or Skip this form" appears. Go to step 11.
 - If no, select **No** to repeat the alignment test. Go to step 9.
11. Select **Print**. The message "Printing completed" appears in the comment line, and the forms print.
12. Select **Exit**. The message "Are you sure you want to exit?" appears.
13. Select **Yes**. The message "You should change the form type back before changing printers. Change printer '*printer*' to original form type '*form type*'?" appears, where *printer* is the name of the printer you entered in the Name of Printer field and *form type* is the form type usually loaded into the printer.
14. Select **Yes**. The Student Processing: Award/Cover Letters menu reappears.

Creating Award Notification Cover Letters

Follow these steps to create award notification cover letters to be printed.

Note When you run this process, the system searches for the cover letter contact with an expected status that the system added when you selected one of the following commands in Financial Aid Entry. The system then creates cover letters for those students it finds with the contact.

- **Schedule** – To schedule an award notification form.
 - **Output** – To immediately print an award notification form.
1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
 2. Select the menu option Create Cover Letters. The Create Cover Letters screen appears.
 3. Enter or change the necessary information in the appropriate fields and select **Finish**. The Addressing Parameters window appears.
 4. Enter or change the necessary information into the appropriate fields and select **Finish**. The Labels Parameters window appears.
 5. Enter the necessary information into the appropriate fields and select **Finish**. The Output Parameters and Scheduling window appears.
 6. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Student Processing: Award/Cover Letters menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have the cover letter contact with an expected status, updates the status to completed, and selects those students to have cover letters printed. After the system completes the process, it sends you email informing you if it completed successfully.

Printing Award Notification Cover Letters

Follow these steps to print award notification cover letters.

1. From the Financial Aid: Student Processing menu, select the menu option Award/Cover Letters. The Student Processing: Award/Cover Letters menu appears.
2. Select the menu option Print Award/Cover Letters and select **Finish**. The Print Award/Cover Letters screen appears.
3. Select **Finish**. The Print Award/Cover Letters screen with the Files to Be Printed segment appears.
4. Select **File**. This enables you to select the file you want to print from the list in the Files to Be Printed segment in the lower portion of the screen.

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

5. Move the cursor to the line with the file you want to print and enter **P** in the Stat field.

You can use the **Up**, **Down**, **Page Backward**, **Page Forward** commands or the **<Arrow>** keys to move the cursor through the list.

6. Select **Done**. The Subtypes to Be Printed segment appears.
7. Move the cursor to the first subtype you want to print (e.g., envelopes or letters). Enter **P** in the Print field. The cursor moves to the Paper field.
8. Enter the appropriate code for the paper type to use. Generally, you will enter **C** (Continuous).
9. Select **Done**. The Print Log segment appears.
10. Enter **P** in the St field. The cursor moves to the First Pos field.
11. Do you want to print a specific range?
 - If yes, update the numbers in the First Pos and Last Pos fields. Press **<Tab>** to move to the next field, if necessary. For example, to print the first 100 of 200 letters, enter **1** in the First Pos field, then enter **100** in the Last Pos field. The Count field automatically changes to reflect the number to print. You may also change the number in the Count field to the total number to print. The number in the Last Pos field automatically changes, depending on the number entered in the First Pos field and the total count number.
 - If no, go to step 12.
12. Select **Done**. The cursor moves to the Device field in the File to Be Printed segment in the upper portion of the screen.
13. Enter the printer name where you want to print the output or select **Table Lookup** for a list of valid printers.

This step is skipped if you’ve already printed a file or a portion of a file (i.e., one subtype) and previously entered the name of the printer.

14. Select **Done**, if necessary. The Current Status segment appears in addition to the message "Print Options."
15. Select **Start Printing**. The message "Printing completed" appears in the comment line.
16. Do you want to print another subtype or file?
 - If yes, go to step 4.
 - If no, select **Exit**. The message "Are you sure you want to exit?" appears.
17. Select **Yes**. The Student Processing: Award/Cover Letters menu reappears.

Note If you only printed one subtype (e.g., only letters), the % Done field on the Files to Be Printed segment displays 50 (for 50%) and the Stat field displays W because a portion of the file remains to be printed. If you do not print the remaining portion, or subtype (e.g., the envelopes), you need to manually update the Stat field to D (Done). When all subtypes (e.g., letters and envelopes) are printed, the system automatically updates the status of the file to D (Done).

Confirming Receipt of Award Notification Forms

When your Financial Aid office receives signed award notification forms, you use Financial Aid Entry to confirm receipt of the forms and complete the document tracking step for the award notifications.

Note You can also use the Contact Entry program in the Financial Aid: Documentation Tracking menu to manually confirm the receipt of signed award notification forms. In the Contact Entry window, you update the status (i.e., St field) of the signed award notice contact from expected (E) to completed (C) and enter the date of receipt in the Cmpl Date field.

Follow these steps to confirm the receipt of an award notification form.

- Note** You can only confirm the receipt of an award notification form for a student whose financial aid records appear on the Financial Aid Entry screen. This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.
1. From the Financial Aid Entry screen, select **Update**. The cursor appears in the Prog field.
 2. Press <Tab> to move the cursor to the Pkg field.
 3. Change the package status from **P** (Pending student acceptance) to **A** (Package accepted by student). The message "Default aid statuses to ACCEPTED (Y/N)?" appears.
 4. Do you want to default individual aid status for each session for all awards?
 - If yes, enter **Y**. The system updates the individual aid status for each award for each session (i.e., the Ad field) to A (Award accepted by student).
 - If no, enter **N** to designate specific aid codes and amounts as being rejected by the student on an individual basis for the aid code and the session.
 5. The message "Confirm that the current award notice form has been received (Y/N)?" appears.

6. Can you confirm that the Financial Aid office has received the current award notification form?
 - If yes, enter **Y**. The system updates the status of the award notification form contact to completed and enters the current date as the completion date. The cursor moves to the Ad field for the first award.
 - If no, enter **N**. The system does not update the status of the award notification form contact to completed. The cursor moves to the Ad field for the first award.
7. Do you want to change or designate specific aid codes and amounts as being rejected by the student on an individual basis for the aid code and the session?
 - If yes, change or enter the necessary information in the appropriate fields and select **Finish**.
 - If no, select **Finish**.
8. The messages “Updating aid records,” “Aid records updated,” and “Adjusting financial aid” appear in the comment line.



Financial Aid Privacy Codes

This section provides information and step-by-step procedures to follow when you:

- Add a Financial Aid Privacy Code
- Update a Financial Aid Privacy Code
- Delete a Financial Aid Privacy Code
- Add Comment to a Privacy Code

Before You Begin

Before you begin to use the following procedures for financial aid privacy code, remember:

- An ID record for the student must already exist on the system.
- The student does not have to complete the admission process, resulting in the creation of a Program Enrollment record for the student.

Process

The following list shows the general phases that take place before, during, and after adding privacy codes associated with financial aid records.

1. Access Financial Aid Entry and enter appropriate parameters for viewing/updating financial aid information.
2. Query a student's financial aid record(s) to appear on the Financial Aid Entry screen.
3. Use the **scRoll-screens** option.
4. Select the **Priv-info** tab.

From here you can add, update, and/or delete any privacy code associated with the student's financial aid.

Comments can also be added to the related privacy code if needed.

5. Once a code has been entered and any privacy code made, select **F** to Finish and save the record.
6. Select **C** to close the record and return to Financial Aid Entry.

Adding Financial Aid Privacy code

Follow these steps to add financial aid privacy code.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records.

1. From the Financial Aid Entry screen, select **Priv-Info**. The Privacy code screen appears.
2. Click the Add button to enter a code.
3. Enter the privacy code and any comments associated with the code. Jenzabar recommends that you enter your name and date after the comments.
4. Select **Finish**. Then **Close** to close and return to the Financial Aid Entry screen.

Note After you enter a privacy code, the word **PRIVACY** appears highlighted to the left of the screen above the student ID on the Financial Aid Entry screen.

Updating Financial Aid Privacy code

Follow these steps to update financial aid privacy code.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records. If a comment exists for the student, the word **PRIVACY** is highlighted and appears to the left of the Rev field on the Financial Aid Entry screen.

1. From the Financial Aid Entry screen, select **Priv-Info** tab under scroll-screens. The Privacy code screen appears.
 2. Select the Privacy code to be updated.
 3. Update the privacy code and any comments needed. Jenzabar recommends that you enter your name and date after the privacy code.
 4. Select **Finish** to save and **Close** to exit the record. The Financial Aid Entry screen reappears.
-

Deleting Financial Aid Privacy code

Follow these steps to delete financial aid privacy code.

Note This procedure assumes you have already accessed Financial Aid Entry and queried on a student to display their financial records. If a comment exists for the student, the word **PRIVACY** is highlighted and appears to the left of the Rev field on the Financial Aid Entry screen.

1. From the Financial Aid Entry screen, select **Priv-Info** tab under scroll-screens. The Privacy code screen appears.
2. Select the Privacy code to be deleted.
3. Highlight the Privacy you want to deleted, select **Delete** from the menu bar on the blob privacy code window, then select **Delete**.

CAUTION

Jenzabar recommends using caution when deleting privacy code as you may lose important information.

4. Select **Finish** to save and **Close** to exit the record. The Financial Aid Entry screen reappears.



Shopping Sheet Notifications

This section provides information and step-by-step procedures to follow when you want to:

- Set a shopping sheet form type to print
- Select shopping sheet forms to print
- Schedule shopping sheet forms to print
- Print a shopping sheet form
- Import a loan aggregate file

Before You Begin

Before you begin to use the following procedures for creating and printing shopping sheet forms, remember:

- An ID record for the student must already exist on the system.
- You can use the field descriptions in the section *Using the Financial Aid Screens* in the *Financial Aid User Reference* when you complete the fields on the Financial Aid Entry screen.

Process

The following list describes the process the system performs when you schedule shopping sheet forms with the **Schedule** command on the Financial Aid Entry screen.

1. The system adds a scheduled contact with an expected status to the student's Contact record.
2. The Select Shopping Sheet process searches for the scheduled contact with an expected status.
3. The system selects students who were scheduled for printing on or before the schedule date.
4. When the Select Shopping Sheet process finishes, the system sends an email message informing you if it successfully completed. If so, you can print the award notification forms.

Note If the email message contains any errors, contact your Jenzabar coordinator.

Setting Shopping Sheet Form Type to Print

Follow these steps to set the shopping sheet form type on a printer.

Note Jenzabar recommends that your Financial Aid office obtain its own dedicated printer to shopping sheet forms. This allows you to load your institution's shopping sheet form into the printer so you do not have to depend on the Computer Center to print the form.

1. From any screen, select the menu option Utility Menu. The Utilities: Main menu appears.
2. Select the menu option Printer Control. The Utilities: Printer Control menu appears.
3. Select the menu option Display Spooler Status. The Display Spooler Status screen appears.
4. Enter the name of the dedicated printer and select **Finish**. A spooler status report appears displaying all forms queued to print and the associated form types. This information is prefaced by the message "Spooler Status Report for '*printer name*'" where *printer name* is the name of the printer you entered.
5. When you finish viewing the spooler status, press <Enter>. The Utilities: Printer Control menu reappears.
6. Select the menu option Load Form Type. The Load Form Type screen appears.
7. Enter the name of the dedicated printer in the Printer field and the form type (i.e., **anform**) in the Output Form Type field. Press <Tab> to move to each field, if necessary.
8. Select **Finish**, then press <Enter>. The Utilities: Printer Control menu appears.
9. Load the blank paper into the dedicated printer and align the form.
10. Select the menu option Start Printer to cause the printer to start printing. The Start Printer screen appears.
11. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press <Enter>. The printer begins to print.
12. Are you finished printing financial aid transcript forms?
 - If yes, select the menu option Clear Form Type and the Clear Form Type screen appears. Go to step 13.
 - If no, go to step 3.
13. Enter the name of the dedicated printer in the Printer field, select **Finish**, then press <Enter>. The Utilities: Printer Control menu reappears.

Scheduling Shopping Sheet Forms to Print

Note The code SHOPSH is the default name of your institution's primary shopping sheet form; however, your institution can change this code. When you schedule a shopping sheet form, the system adds a scheduled contact with an expected status to the student's Contact record. The system searches for this contact to print award notification forms in batch mode.

You can only schedule a shopping sheet form for a student whose financial aid records appear on the Financial Aid Entry screen. This procedure assumes you

have already accessed Financial Aid Entry and queried on a student to display their financial records.

Follow these steps to schedule shopping sheet forms for printing.

1. From the Financial Aid Entry screen, select **Schedule**. The message “Shopping sheet form ‘SHOPSH or ANFORM’ for this student (Y/N/Ctrl-U Change Form)?” appears in the comment line.
2. Take one of the following actions:
 - If you don’t want to print the shopping sheet form, enter **N**. The toolbar reappears and no action occurs.
 - If you want to use the SHOPSH enter **Y**. The messages “Loading shopping sheet” then “Shopping sheet” appear in the comment line. Go to step 5.
 - If you want to change the form, press <Ctrl-u>. The Financial Aid Entry Program Parameters screen appears with the cursor in the Output Form field and the system prompts you to verify the parameters before printing. Go to step 3.
3. Enter the name of the shopping sheet form you want to schedule to be used and select **Finish**. The Financial Aid Entry screen reappears, and the message “Shopping sheet form ‘*form name*’ for this student (Y/N/Ctrl-U Change Form)?” appears in the comment line, where *form name* is the name of the new shopping sheet form you want to schedule to be used.

Note The Schedule Date field in the Financial Aid Entry Program Parameters screen allows you to print shopping sheet forms in different groups. You can use the schedule date to delay printing shopping sheet forms for selected students.

4. Enter **Y**. The system adds the scheduling contact to the student’s Contact record.
5. Do you want to schedule another shopping sheet form for another student?
 - If yes, select **Query** to find the student and display their financial aid records. Go to step 1.
 - If no, select **Exit**. The message “Are you sure you want to exit?” appears.
6. Select **Yes**. The menu reappears.

Selecting Shopping Sheet Forms to Print

Follow these steps to select shopping sheet forms to be printed.

Note When you run this process, the system searches for the scheduled contact with an expected status that the system added when you selected the **Schedule** command in Financial Aid Entry. The system then selects shopping sheet forms for those students it finds.

1. From the Financial Aid: Student Processing menu, select the menu option Shopping Sheet.
2. Select the menu option Select Shopping Sheet. The Select Shopping screen appears.

3. Change the fields if necessary, and select **Finish**. The Output Parameters and Scheduling window appears.
4. Change the fields on the window so the program executes according to your needs, and select **Finish**. The Student Processing: Shopping Sheet menu reappears.
 - For more information about using the Output Parameters and Scheduling window, see the *Getting Started User Introduction*.
 - If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. The system searches the database for all students who have the scheduled contact with an expected status, updates the status to completed, and selects those students to have award notification forms printed. After the system completes the process, it sends you email informing you if it completed successfully.

Printing Shopping Sheet Forms

Follow these steps to print shopping sheet forms.

1. From the Financial Aid: Student Processing menu, select Shopping Sheet menu option. The Student Processing: Print Shopping Sheet appears.
2. Select the menu option Print Shopping sheets and select **Finish**. The Shopping sheets screen appears.
3. Select **Formtype**. The cursor advances to the Type of Form field.
4. Enter the type of form that you want to print (i.e., **shopsh**) and press <Tab> to move the cursor to the Name of Printer field.
5. Enter the name of the printer on which to print the forms and press <Tab> to move the cursor to the Station Number field.
6. Enter the station number (if required) and select **Finish**. The message “Please load the ‘shopsh’ forms into ‘printer’” appears, where *printer* is the name of the printer you entered in the Name of Printer field.
7. Load the necessary form type into the printer and select **Loaded**.
8. Select **Start**. The message “Are forms correctly aligned” appears.
9. Do you want to print a test form to ensure the forms are correctly aligned?
 - If yes, select **No**. A test form prints and the message “Are forms correctly aligned” reappears.
 - If no, select **Yes**. The message “Begin printing or Skip this form” appears. Go to step 11.
10. Are the forms correctly aligned?
 - If yes, select **Yes** to continue printing. The message “Begin printing or Skip this form” appears. Go to step 11.
 - If no, select **No** to repeat the alignment test. Go to step 9.
11. Select **Print**. The message “Printing completed” appears in the comment line, and the forms print.
12. Select **Exit**. The message “Are you sure you want to exit?” appears.

13. Select **Yes**. The message “You should change the form type back before changing printers. Change printer ‘*printer*’ to original form type ‘*form type*’?” appears, where *printer* is the name of the printer you entered in the Name of Printer field and *form type* is the form type usually loaded into the printer.
14. Select **Yes**. The Student Processing: Shopping Sheet menu reappears.

Import Loan Aggregate File

Follow these steps to import the loan aggregate file.

Note When you run this process, the system searches for the import file shopmetrics from the *pcfin directory*.

1. From the Financial Aid: Student Processing menu, select the menu option Shopping Sheet.
2. Select Import Loan Aggregate File menu option from the Shopping Sheet menu.
3. The Import menu will appear and the following parameter input:
Report's Filename
(The file name allows for 20 characters to be entered into the field (alpha or numeric) and requires the file to be in the *pcfin directory*).
4. Select **Finish** to run the process.

Note When you run this process, it does the use of Trial Run Mode in which to see what would be updated before inserting the records.

This process will update the loan aggregate record (loanagg_rec) to store all the values from the import file for your institution.



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