Setting Up Your Financial Aid Awarding Cycle

Understanding the Financial Aid Awarding Cycle

The financial aid awarding cycle is a set of recurrent operations used by institutions when they process and manage student data to evaluate, award, and disburse federal, state, institutional, and private funding. The typical financial aid processing cycle may encompass multiple academic years. Institutions process continuing students for the current aid year and, at the same time, process applications for the upcoming aid year.

One of the first steps in setting up your awarding cycle is to define the boundaries of each financial aid year to maintain separate and unique financial aid years throughout a student's educational career. In addition to setting up the aid year, your institution must associate the financial aid year with your school code or codes and identify all possible careers for each aid year and school code. School codes are defined by the U.S. Department of Education and are used to track a student's aggregate aid history. An institution might have separate school codes for a medical school and a law school. Because school codes do not share careers, you must link each school code and academic career separately.

You must specify which academic careers qualify for financial aid and set up valid terms for each financial aid career. Doing so provides the general guidelines to award and process aid within the award year. For example, your institution might have an evening degree program that does not award financial aid or offer financial aid for all of its academic terms.

The actual Awarding process takes place when your institution receives the first Institutional Student Information Records (ISIRs), PROFILE, or institutional application. The ISIR is the need analysis from the Department of Education to establish a student's need for financial aid. PROFILE is the need analysis form the College Board. Institutional applications are institution-specific need analysis forms. For new students, awards are made and notifications are sent on an ongoing basis up to the beginning and sometimes well into the award year for which the students are admitted. For continuing students, the goal is to mail notifications before the close of the academic year. The financial aid process of awarding entails need analysis and, for continuing students, checking academic progress.

In addition to the awarding cycle, the following processes must occur in the financial aid office for each aid cycle:

- Loading ISIRs and PROFILE applicant data.
- Entering institutional application information.
- Verifying selected students.
- Handling ISIR corrections.
- Processing budgets for the current and upcoming award years.

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- Tracking requested documents and loan applications.
- Monitoring all spending and reconciliation of funds.
- Managing origination and disbursement of Title IV/Campus Based programs.
- Providing ongoing loan entrance and exit counseling.
- Defining aid year rollover.

Prerequisites

Before implementing the Financial Aid system, examine how your financial aid office and your institution function. To take advantage of the flexibility of the PeopleSoft Campus Solutions system, decide how you want to implement your operational structure, awarding practices, and institutional procedures within the Financial Aid system.

When you prepare to set up the Financial Aid system:

- Decide what data elements you want converted for use in your new system if you are moving from a legacy system.
- Identify and decide which academic careers are valid for awarding and processing of financial aid after you establish your institution's academic structure.

  The creation and design of academic careers is carried out primarily by the staff that operates PeopleSoft Student Records.

  See Creating Aid Processing Rule Sets.
- Identify which terms and sessions are valid for awarding and processing of financial aid after you establish your institution's academic structure.

  The design and creation of terms and sessions is carried out primarily by the staff that operates Student Records.

  See "Defining Term Values *(PeopleSoft Campus Solutions 9.0: Application Fundamentals)*"

  See "Setting Up Time Periods *(PeopleSoft Campus Solutions 9.0: Application Fundamentals)*"

  See "Defining Enrollment Action Reasons *(PeopleSoft Campus Solutions 9.0: Application Fundamentals)*"

  See "Defining Terms, Sessions, and Session Time Periods *(PeopleSoft Campus Solutions 9.0: Application Fundamentals)*"
- Determine all aspects that need to be considered for the setup process.

  Consider your institutional and financial aid office needs in broad terms. This plan should include such items as your term structure, the Title IV school codes for your institution, your packaging policies, your disbursement patterns, financial aid fund information, and any business practices that are unique to your institution.

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Establishing Aid Years

To set up aid years, use the Define Federal Aid Years (FED_AID_YR_TBL) and Define Financial Aid Years (AID_YEAR_TABLE) components.

This section discusses how to:

- Define federal aid years.
- Associate federal aid years with academic years.

Pages Used to Establish Aid Years

Page Name	*Definition Name*	*Navigation*	*Usage*
Federal Aid Year Setup	FED_AID_YR_TBL	Set Up SACR, Product Related, Financial Aid, Aid Year, Define Federal Aid Year, Federal Aid Year Setup	Set up the Federal Aid Year table.
Financial Aid Year	AID_YEAR_TABLE	Set Up SACR, Product Related, Financial Aid, Aid Year, Define Financial Aid Years, Financial Aid Year	Associate a valid federal aid year with the academic year of your institution.

Defining Federal Aid Years

Access the Federal Aid Year Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Define Federal Aid Year, Federal Aid Year Setup).

Image: Federal Aid Year Setup page

This example illustrates the fields and controls on the Federal Aid Year Setup page. You can find definitions for the fields and controls later on this page.

This table defines the aid year according to the standards set by the U.S. Department of Education. You must define all aid years that you are processing in this table.

Enter the days that the aid year begins and ends.

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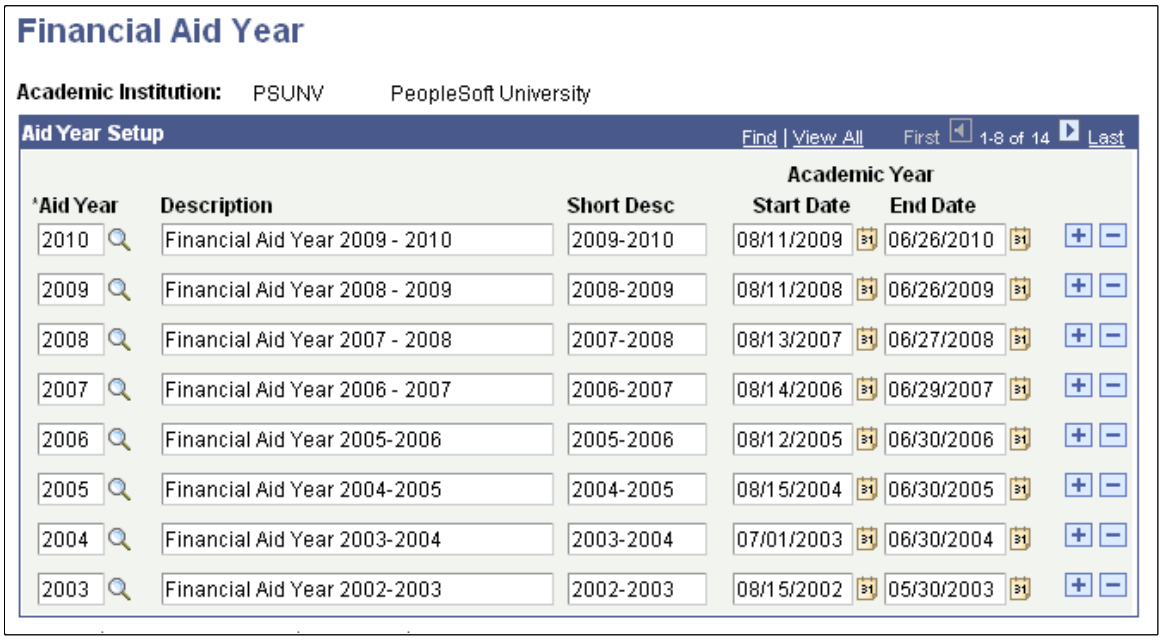
Associating Federal Aid Years with Academic Years

Access the Financial Aid Year page (Set Up SACR, Product Related, Financial Aid, Aid Year, Define Financial Aid Years, Financial Aid Year).

Image: Financial Aid Year page

This example illustrates the fields and controls on the Financial Aid Year page. You can find definitions for the fields and controls later on this page.



Financial Aid Year

Academic Institution: PSUNV PeopleSoft University

Aid Year Setup — Find | View All — First 1-8 of 14 Last

*Aid Year	Description	Short Desc	Academic Year Start Date	Academic Year End Date
2010	Financial Aid Year 2009 - 2010	2009-2010	08/11/2009	06/26/2010
2009	Financial Aid Year 2008 - 2009	2008-2009	08/11/2008	06/26/2009
2008	Financial Aid Year 2007 - 2008	2007-2008	08/13/2007	06/27/2008
2007	Financial Aid Year 2006 - 2007	2006-2007	08/14/2006	06/29/2007
2006	Financial Aid Year 2005-2006	2005-2006	08/12/2005	06/30/2006
2005	Financial Aid Year 2004-2005	2004-2005	08/15/2004	06/30/2005
2004	Financial Aid Year 2003-2004	2003-2004	07/01/2003	06/30/2004
2003	Financial Aid Year 2002-2003	2002-2003	08/15/2002	05/30/2003

Aid Year — Select the federal aid year to be associated with your academic year start and end dates.

Academic Year Start Date and **Academic Year End Date** — Enter the dates that your institution's academic year begins and ends. Academic year start and end dates are reported on the origination record to the Common Origination and Disbursement (COD) system.

Setting Up Your School Codes

To set up school codes, use the School Code Table (TIV_SCHOOL_CODE), Campus OPEID (SFA_COD_CAMP_OPEID), and School Codes for Institutions (INST_SCHOOL_CDS1) components.

A school code is assigned to each institution participating with the Department of Education and is used as an identification code during Electronic Data Exchange (EDE). In addition to its use in EDE processing, the Title IV school code is used to track a student's aggregate aid history.

This section discusses how to:

- Define your school code.
- Define your Campus OPEID codes.

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- Associate federal aid years with an aid year.

Pages Used to Set Up School Codes

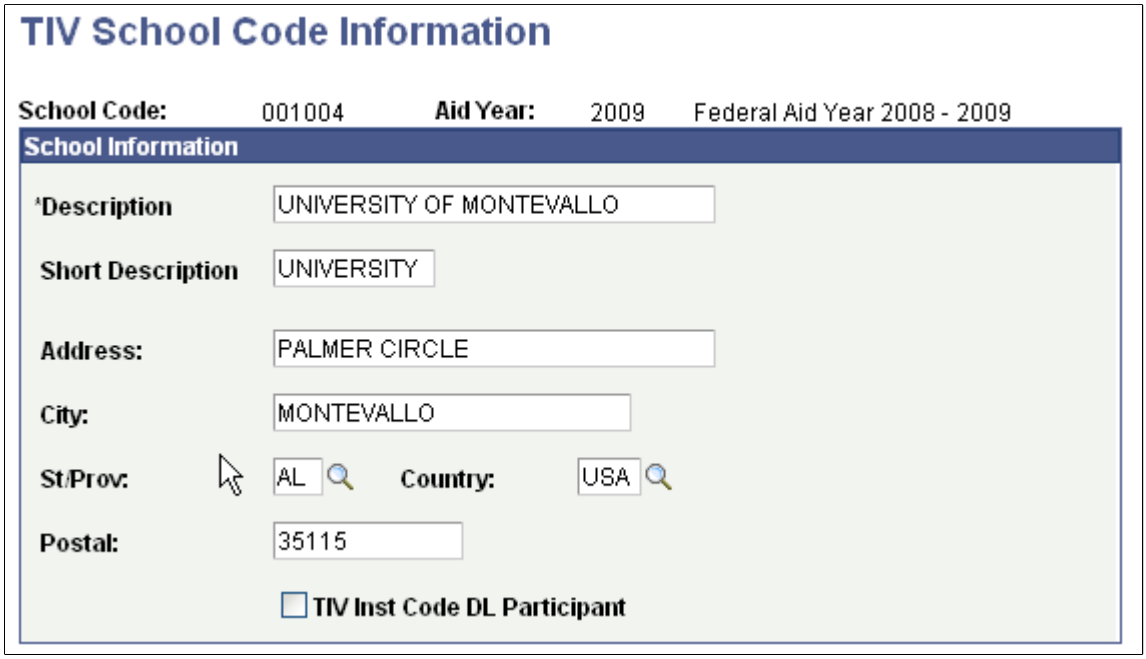
Page Name	*Definition Name*	*Navigation*	*Usage*
TIV School Code Information (Title IV school code information)	TIV_SCHOOL_TABLE	Set Up SACR, Product Related, Financial Aid, Aid Year, School Code Table, TIV School Code Information	Review the Title IV School Code Table and enter a description and address information for your school code.
Campus OPEID	SFA_COD_CAMP_OPEID	Set Up SACR, Product Related, Financial Aid, Aid Year, Campus OPEID Codes, COD Campus OPEID, Campus OPEID	Use this page to setup campus OPEID codes and defaults.
School Codes for Institution	INST_SCHOOL_CDS	Set Up SACR, Product Related, Financial Aid, Aid Year, School Codes for Institution, School Codes for Institution	Link an aid year with the Department of Education Title IV school codes for your institution.

Defining Your School Code

Access the TIV School Code Information page (Set Up SACR, Product Related, Financial Aid, Aid Year, School Code Table, TIV School Code Information).

Image: TIV School Code Information page

This example illustrates the fields and controls on the TIV School Code Information page. You can find definitions for the fields and controls later on this page.



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You can add or correct information on this page if the U.S. Department of Education has made an error or omission in the description or address information for your institution.

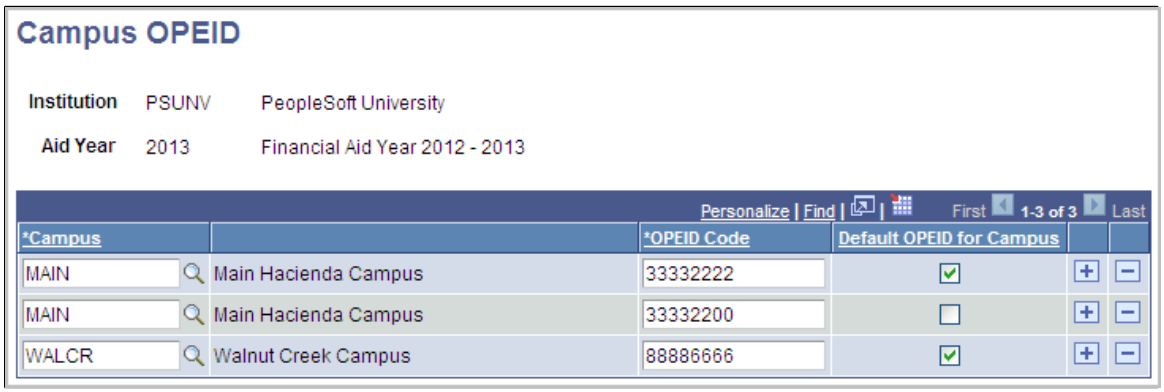
Title IV Inst Code DL Participant (Title IV institution code direct loan participant)	Select if your institution participates in the federal Direct Lending Program. No processing is associated with this field.

Defining Your Campus OPEID Codes

Access the OPEID Codes page (Set Up SACR, Product Related, Financial Aid, Aid Year, Campus OPEID Codes, COD Campus OPEID, Campus OPEID).

Image: Campus OPEID page

This example illustrates the fields and controls on the Campus OPEID page.



Use this page to set up campus OPEID codes for campuses and designate default codes.

COD requires schools to report a student's physical campus of attendance as the Enrollment School Code using the 8 digit OPEID codes assigned to your institution. You may enter as many unique combinations as is required to support your processing. However only one unique Campus and OPEID Code combination can be designated as the default for COD disbursement use. COD processing uses Campus OPEID setup and the Campus field on a student's Financial Aid Term record to determine what OPEID Code should be reported to COD as the Enrollment School Code. The Enrollment School Code is maintained at an individual disbursement level and can be overridden for an individual student on the student's COD Origination record. Once an actual disbursement has been reported to COD, the field will no longer be available for override.

The Enrollment School Code can also be updated on both the Loan and Pell origination disbursement records with the Population Update process.

See Reviewing Pell Disbursement Results.

See Viewing Loan Status Summary Information.

See "Using the Population Selection Process *(PeopleSoft Campus Solutions 9.0: Campus Community)*".

Campus	Select a campus to assign an OPEID Code to.
OPEID Code	Enter the OPEID code for the selected campus.

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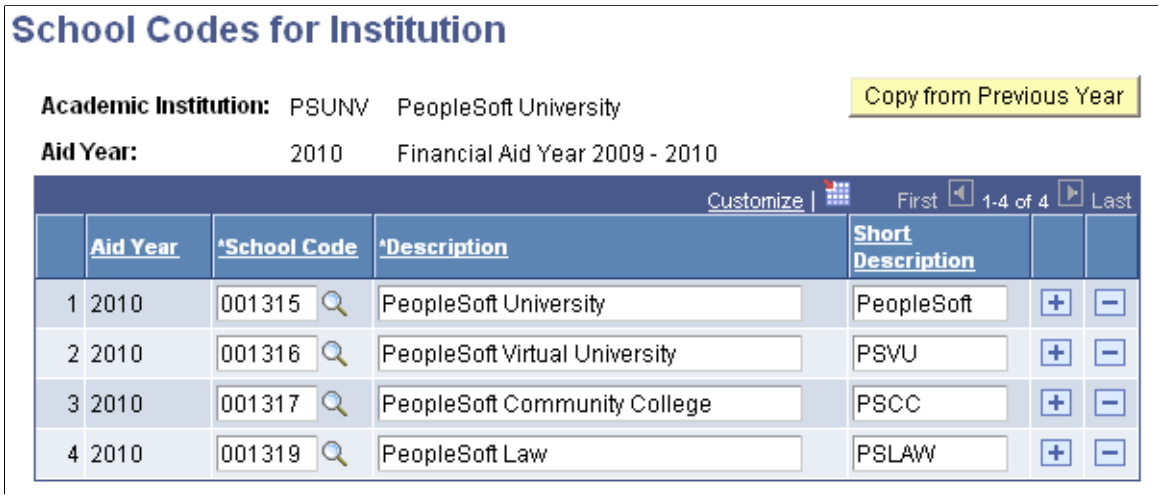
Default OPEID Code Check this box if you want the this Campus and OPEID Code combination to be the default value used for this campus in COD processing.

Associating School Codes with an Aid Year

Access the School Codes for Institution page (Set Up SACR, Product Related, Financial Aid, Aid Year, School Codes for Institution, School Codes for Institution).

Image: School Codes for Institution page

This example illustrates the fields and controls on the School Codes for Institution page. You can find definitions for the fields and controls later on this page.



School Code Select the school code that you want to associate with the displayed aid year. If your institution has more than one school code, you can add rows and enter as many school codes as you need.

Copy from Previous Year Click to copy the school codes entered for the previous aid year to the current aid year. This process overrides any information that you have entered for the current aid year.

Establishing Defaults

To set up defaults, use the Installation Defaults (INSTALLATION_FA) and Aid Processing Rule Setup (FA_DFLT_RULE_SET) components.

This section provides an overview of defaults and discusses how to:

- Define installation level defaults.
- Create aid processing rule sets.
- Link aid processing rule sets to careers and programs.

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Understanding Defaults

Many of the setup pages in the Financial Aid system are specific to an aid year or a career. However, the various processes in the system use certain general financial aid processing values as default values. These default values remain the same for many aid years and apply to students regardless of their career. Therefore, these defaults are established on one page, the Financial Aid Defaults page, which is not keyed by aid year or career, and are applied to all institutions in your system. When you establish your installation defaults, select the values that represent the majority of your institutions, careers, and programs.

Financial Aid provides additional flexibility in creating aid processing defaults. If certain careers or programs require default values that vary from the installation defaults, you can establish aid processing rule sets at either a career-specific or program-specific level to define alternate values for selected defaults. These default options include:

- Academic and nonstandard base weeks.
- Pell Grant eligibility calculation criteria.
- Gap financial aid item types.
- Packaging data source defaults.
- Institutional application source.
- Pell number of terms.

The aid processing rule set can then be associated with the career that varies from the installation defaults, or the program that varies from both the career and installation defaults.

Set up aid processing rule sets only for those combinations of aid year and career that differ from each other and from your installation defaults and for those combinations of aid year and program that differ from each other, from the associated career level defaults, and from your installation defaults.

Associate these rule sets with the appropriate aid year and career combination on the Valid Careers for Aid Year page or with the appropriate aid year and program combination on the Valid Programs for Aid Year and Career page. If a career or program does not vary from the installation defaults, you *do not* need to establish and assign an aid processing rule set for that career or program.

Note: If no careers or programs differ from the installation defaults, you do not need to create aid processing rule sets, and you can leave the Aid Processing Rule Set column blank on both the Valid Careers for Aid Year and Valid Programs for Aid Year and Career pages.

Because the default aid processing rules for an individual student can be defined at the program, career, or installation level, various financial aid processes check for defaults in the following order to ensure that the correct aid processing rules are used:

1. Aid processing rule set associated with the student's program.
2. Aid processing rule set associated with the student's career.
3. Installation defaults specified on the Financial Aid Defaults page.

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Pages Used to Establish Defaults

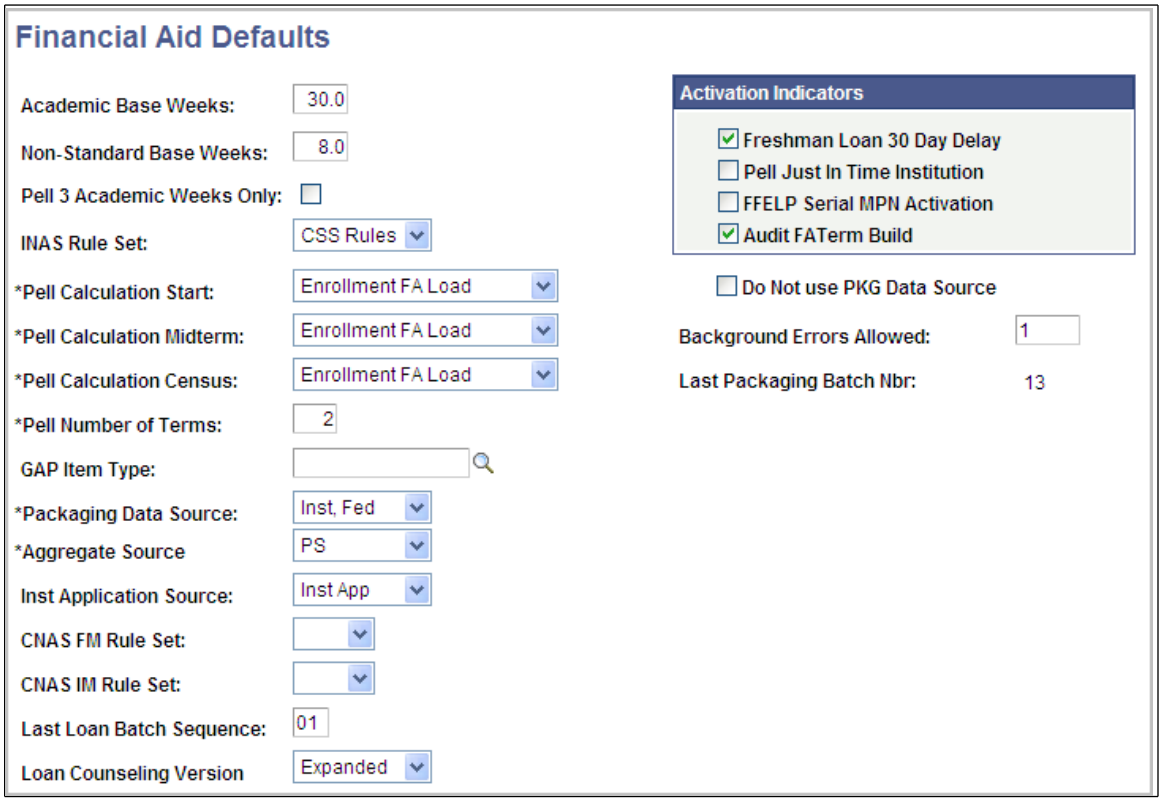
Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid Defaults	INSTALLATION_FA	Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults	Define general financial aid processing defaults at the installation level.
Aid Processing Rule Setup	FA_DFLT_RULE_SET	Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup	Create aid processing rule sets that you can use to define defaults at the career and program level that differ from the installation default values.

Defining Installation Level Defaults

Access the Financial Aid Defaults page (Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults).

Image: Financial Aid Defaults page

This example illustrates the fields and controls on the Financial Aid Defaults page. You can find definitions for the fields and controls later on this page.



Academic Base Weeks Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated expected family contribution (EFC).

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Valid values are 0.0 to 99.9.

Non-Standard Base Weeks

Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions.

Valid values are 0.0 to 99.9.

Pell 3 Academic Weeks Only

Select so the Pell Grant calculation uses only Academic Base Weeks as the Academic Program's Weeks of Instruction for Formula 3. If not selected, the Pell Grant calculation sums the Academic Base Weeks and Non-Standard Base Weeks together to determine the Academic Program's Weeks of Instruction.

Note: Academic Base Weeks and Non-Standard-Base Weeks are added together to determine an Academic Program's Weeks of Instruction. This Weeks of Instruction value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term when calculating Pell Grant eligibility for Formula 3— FA Load, Formula 3—Current Load, and Formula 3 — Full-time Load.

INAS Rule Set (institutional need analysis system rule set)

Select an INAS rule set to define need analysis calculation options for your student population that do not have an academic career specified in the Financial Aid Term record or in the Student Career Term table. You can use a different rule set for any career or program by establishing a relationship between the career and rule set on the Valid Careers for Aid Year page (AID_YEAR_CAREER) or the program and rule set on the Valid Programs for Aid Year and Career page (AID_YEAR_PROGRAM).

The INAS rule set value provides full flexibility to determine how need analysis is performed. You load the INAS Rule Set table into the system by using a data mover script that is delivered to your institution each year in a regulatory release.

Select the INAS Rule Set from these values: *CSS Rules*, *Health Pro* (health professional), or *Ugrd/Grad* (undergraduate/graduate).

The INAS rule sets are delivered as translate values and should not be changed or altered in any way. You can create additional INAS rules sets for your institution by creating additional translate values.

Pell Calculation Start

Enter the option to use for Pell calculations made before the student's academic term start date. Values are:

Enrollment Current Load (For use only with 2009 and prior Aid Years): Directs the Pell calculation to use the Current Load

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value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units that the student is currently enrolled in, plus the number of units from already completed sessions in the term to determine the student's load for the term.

Enrollment FA Load (For use only with 2009 and prior Aid Years): Directs the Pell calculation to use the FA Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The FA Load value uses the number of financial aid eligible units that the student is enrolled in for the term to determine the student's load.

Formula 1 — FA Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to divide the Pell Grant award by the Pell Number of Terms and uses the student's actual FA Load for each term.

*Formula 1 — Full-time (For use only with 2010 and future Aid Years):*Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses Full-time as the student's FA Load for each term.

Formula 3 — Current Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the Current Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term.

Formula 3 — FA Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the FA Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Formula 3 — Full-time Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic

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Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility.

Full Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the full time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant regardless of the student's enrollment.

Half Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the half time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant, regardless of the student's enrollment.

Pell Calculation Midterm

Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

Pell Calculation Census

Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.

Pell Number of Terms

Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using the *Formula 1 - FA Load,* Formula 1 - Full-time, *Full Time,* or *Half Time* Pell calculation values. If you select *Formula 1 — FA Load* or *Formula 1 — Full-time,* you must populate the Pell Number of Terms field.

Gap Item Type

Select the gap financial aid item type that you created for this instance. Gap is an artificial figure that instructs Packaging to set aside an amount of unmet need to be funded later. It prevents full funding to any student to conserve funds or to provide room to award other types of aid in the future. The gap financial aid item type that you enter here is used when you assign a gap packaging rule in a packaging plan.

See Defining Gap Financial Aid Item Types.

Packaging Data Source

Select which application data to use when packaging a student for financial aid. The system also tells the Equation processor which application data to gather for use in equations.

Fed Only (federal only): This is the default value that instructs Packaging to gather data from the ISIR_** records. When *Fed*

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Only is selected, students are packaged only if they have federal application data (ISIR) available. If *Fed Only* is selected and the student has no ISIR data, the student is *not* packaged and the following error message is displayed during packaging:

Student has no ISIR data.

Fed, Inst (federal, institutional): Instructs Packaging to gather federal application data (ISIR) if available. Otherwise, Packaging gathers institutional application data (PROFILE). If neither federal nor institutional application data exists for the student, the student is *not* packaged and the following error message is displayed during packaging:

Student has neither ISIR nor Institutional data.

Inst Only (institutional only): Instructs Packaging to gather data from the INST_** records. When *Inst Only* is selected, students are packaged only if they have institutional application data (PROFILE or institutional application) available. If *Inst Only* is selected and the student has no PROFILE data, the student is *not* packaged and the following error message is displayed during packaging:

Student has no Institutional data.

Inst, Fed (institutional, federal): Instructs Packaging to gather institutional application data (PROFILE, or institutional application) if available. Otherwise, Packaging gathers federal application data (ISIR). If neither institutional nor federal application data exists for the student, the student is not packaged and the following error message is displayed during packaging:

Student has neither ISIR nor Institutional data.

Aggregate Source

Select the source for aggregate lifetime totals that Packaging should reference when determining lifetime limits. Values are:

NSLDS: Packaging uses National Student Loan Data System (NSLDS) aggregate history totals that have been pushed into the PeopleSoft aggregate tables for packaging.

PS: This is the default value. Packaging uses the existing undergraduate and graduate totals currently maintained by the institution on the aggregate tables for packaging.

Note: Aggregate Source is set either at the installation default level or individually for each student on the Packaging Status Summary or award page components.

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Inst Application Source (institutional application source)	Enter the institutional application used when you select *Fed, Inst, Inst Only,* or *Inst, Fed* as the Packaging Data Source. You can select *Inst App* (institutional application), or *Profile.*
CNAS FM Rule Set (Canadian need analysis system federal methodology rule set)	Enter the rule set that defines the CNAS calculation guidelines that use federal methodology.
CNAS IM Rule Set (Canadian need analysis system institutional methodology rule set)	Enter the rule set that defines the CNAS calculation guidelines that uses institutional methodology.
Last Loan Batch Sequence	Enter a new sequence number of the last loan batch ID code processed. The system automatically updates this field each time a CommonLine or Direct Loan transaction file is created. You may need to update this if a conflict occurs.
Loan Counseling Version	Select the Loan Counseling Version for use throughout the system. This selection controls what components of Loan Counseling are available and how Authorization and Disbursement processing evaluates loan counseling requirements to release funds for disbursement. This selection also controls how loan counseling is displayed on the Packaging Status Summary page. • *Simple:* Select to limit the management of loan counseling to annual evaluation and processing. This is the default value. • *Expanded:* Select to enable multiple loan counseling setup options: annual , multiple aid year, and student self-service,
Do Not Use PKG Data Source (do not use a packaging data source)	Select this check box to have the system not check for either an existing federal application (ISIR) or an institutional application (such as PROFILE) when accessing the Award Entry component. Clear this check box to have the system check for the existence of either a federal application or an institutional application when accessing the Award Entry component. If the student doesn't have either application, a warning message appears.
Background Errors Allowed	Enter the number of background errors that your institution wants to allow during background processing before the system terminates the run. You may want to set this field to a number greater than one. If you do not increase this value, background processing stops after encountering only one error.
Last Packaging Batch Nbr (last packaging batch number)	Displays the number that the system generates when you run the Mass Packaging process.

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Activation Indicators

Freshman Loan 30 Day Delay	Select to ensure that loans awarded to first-time, first-year students are assigned to a disbursement plan with the 30 Day Delay Loan Plan option selected.
Pell Just In Time Institution	Select if your institution participates in the Just-In-Time program for Pell funding. This sets the Just-In-Time flag. When this flag is set, the Pell Disbursement Outbound process compares the disbursement date to the system date and does not process outbound records if the process date is more than three days from the disbursement date found on student award tables. Based on accepted origination and disbursement records, the funds for the requested disbursement are directly deposited into your institution's account.
FFELP Serial MPN Activation (federal family educational loan program serial master promissory note activation)	Select to indicate that your institution qualifies for serial master promissory note (MPN) processing. The field controls the default settings of the serial MPN fields in the CommonLine loan destination profile components. Select even if you have groups within your institution that do not qualify for serial MPN processing based on a regulatory or school policy.
Audit FA Term Build (audit financial aid term build)	Select to cause the system to write a row to the audit table if any changes occur to audited fields when you rebuild an FA term. View changes to the audited fields for a student using the FA Term Field Audits page. If you clear this check box, you cannot view the FA Term Field Audits page.

Related Links

Selecting Your Application Data Source for Awarding

Adding an Application Source Code for Canadian Applications

Defining Packaging Plans

Awarding Pell Grants for the 2010 and Future Aid Years

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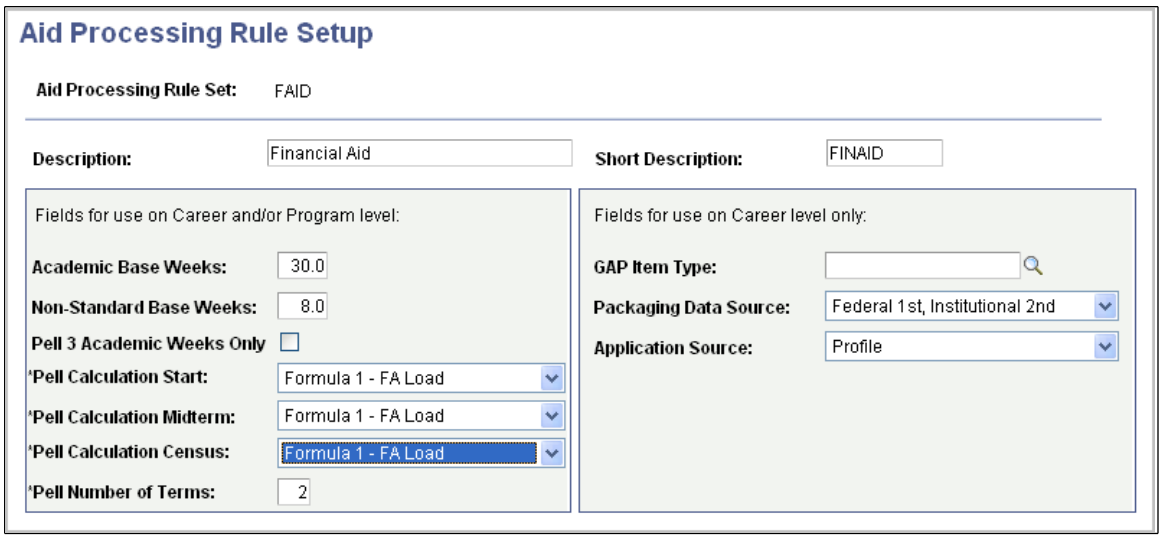
Creating Aid Processing Rule Sets

Access the Aid Processing Rule Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup).

Image: Aid Processing Rule Setup page

This example illustrates the fields and controls on the Aid Processing Rule Setup page.



Create as many rule sets as necessary for your business practices. The aid processing rule sets created on this page can be associated with a combination of aid year and academic career or aid year and academic program.

Enter a value for all fields on this page. The fields in the Fields for use on Career level only group box cannot differ for programs within the same career. If you are defining aid processing rule sets for multiple programs within a career, the values that you select in this group box should be the same for both aid processing rule sets. If you select different values, Packaging uses the values from the first aid processing rule set associated with the career for these fields.

The fields on this page correspond to those on the Financial Aid Defaults (INSTALLATION_FA) page.

Note: The Pell Number of Terms field is at the Academic Program Level.

Related Links

Defining Installation Level Defaults

Linking Aid Processing Rule Sets to Careers and Programs

Complete the Valid Career for Aid Year page. (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year).

Related Links

Listing Valid Careers for the Aid Year

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Establishing Careers and Programs

To set up careers and programs, use the Valid Careers for Aid Year component (AID_YEAR_CAREER), Valid Programs for Aid Year component (AID_YEAR_PROGRAM), Careers for School Codes component (SCHOOL_CAREER1), Valid Terms for Career component (AID_YR_CAR_TERM), and the Define Career Types component (CAREER_TYPE). Use the AID_YR_CAR_TERM_CI component interface to load the data into the tables for this component interface.

This section discusses how to:

- List valid careers for the aid year.
- Define valid programs for aid year and career.
- Associate careers with school codes.
- Define valid terms for careers.
- Assign financial aid career types.

Pages Used to Establish Careers and Programs

Page Name	***Definition Name***	***Navigation***	***Usage***
Valid Careers for Aid Year	AID_YEAR_CAREER	Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year	List all academic careers that are eligible for financial aid during an aid year for an academic institution and assign the appropriate rule sets for need analysis calculations and for financial aid processing.
Copy Careers for Aid Year	AID_YR_CAR_COPY	Click the Copy button on the Valid Careers for Aid Year page.	Copy valid careers from one combination of academic institution and aid year to another.
Valid Programs for Aid Year and Career	AID_YEAR_PROGRAM	Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Programs for Aid Year, Valid Programs for Aid Year and Career	Assign rule sets for need analysis calculations and assign financial aid processing rule sets that are specific to a program.
Copy Programs for Aid Year and Career	AID_YEAR_PROG_COPY	Click the Copy button on the Valid Programs for Aid Year and Career page.	Copy program-level defaults from one combination of academic institution, aid year, and career to another.
Careers For School Codes	SCHOOL_CAREER	Set Up SACR, Product Related, Financial Aid, Aid Year, Careers for School Codes	Specify the valid careers that exist for each Title IV school code at your institution.

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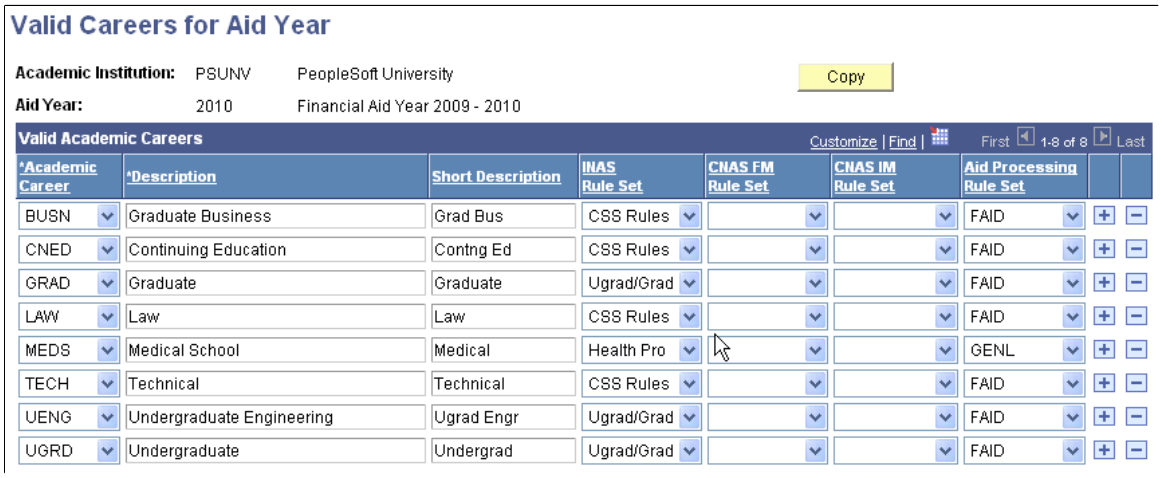
Page Name	*Definition Name*	*Navigation*	*Usage*
Copy Careers for School Code	SCHOOL_CAR_COPY	Click the Copy button on the Careers for School Codes page.	Copy valid careers from one combination of academic institution, aid year, and school code to another.
Valid Terms for Careers	AID_YR_CAR_TERM	Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Terms for Careers	Define the eligible financial aid terms for each combination of academic career and aid year after you have specified the valid careers for each aid year.
Financial Aid Career Type	CAREER_TYPE	Set Up SACR, Product Related, Financial Aid, Financial Aid Terms, Define Career Types, Financial Aid Career Type	Associate each of your academic careers with a financial aid career type.

Listing Valid Careers for the Aid Year

Access the Valid Careers for Aid Year page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year).

Image: Valid Careers for Aid Year page

This example illustrates the fields and controls on the Valid Careers for Aid Year page. You can find definitions for the fields and controls later on this page.



Insert additional rows for all academic careers for this aid year at your institution.

INAS Rule Set (institutional need analysis system rule set)

Select an Institutional Need Analysis (INAS) rule set to define need analysis calculation options to associate with this career.

The INAS rule set value provides full flexibility to determine how need analysis is performed. You load the INAS Rule Set table into the system using a data mover script delivered to your institution each year in a regulatory release.

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	Select the INAS Rule Set from these values: *CSS Rules*, *Health Pro* (health professional), or *Ugrd/Grad* (undergraduate/graduate). The INAS rule sets are delivered as translate values and should not be changed or altered in any way. You can create additional INAS rules sets for your institution by creating additional translate values.
CNAS FM Rule Set (Canadian Need Analysis System federal methodology rule set)	Select the CNAS rule set that provides calculation guidelines that define general need analysis to use for processing with federal methodology. This value is whatever your institution set up as CNAS rule sets such as CSL (Canada Student Loan) and OSL (Ontario Student Loan).
CNAS IM Rule Set (Canadian Need Analysis System institutional methodology rule set)	Select the CNAS rule set that provides calculation guidelines that define general need analysis to use for processing with institutional methodology. This value is whatever your institution set up as CNAS rule sets such as CSL (Canada Student Loan) and OSL (Ontario Student Loan).
Aid Processing Rule Set	For careers that have different default processing values from those specified at the installation level (on the Financial Aid Defaults page), select the aid processing rule set that you created that contains the correct default processing values for this career. For Pell Grant Awarding purposes, you might consider creating unique Pell Calculation Rule Sets by Academic Career.
Copy	Click this button to access the Copy Careers for Aid Year page and copy valid careers from one combination of academic institution and aid year to another.

Related Links

Establishing Defaults

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Defining Valid Programs for Aid Year and Career

Access the Valid Programs for Aid Year and Career page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Programs for Aid Year, Valid Programs for Aid Year and Career).

Image: Valid Programs for Aid Year and Career page

This example illustrates the fields and controls on the Valid Programs for Aid Year and Career page.

Enter only those programs that require a different need analysis or aid processing rule set than the installation defaults or the rule sets assigned to the program's career. If none of the academic programs within a career requires rule sets that differ from the career's rule sets, do not set up any programs for that career on this page.

For each academic program that you enter on this page, enter only those fields that differ from the career's value or the installation default value. For example, if the academic program uses the same INAS rule set as the career, but requires a different aid processing rule set, populate only the Aid Processing Rule Set field on this page. For Pell Grant Awarding purposes, you might consider creating unique Pell Calculation Rule Sets by Academic Program. For example, if an Academic Program supports a Leading Summer term, you might create a unique Pell Calculation Rule Set that distinguishes it from an Academic Program that doesn't support a Summer term.

Click the Copy button to access the Copy Programs for Aid Year and Career page and copy program-level defaults from one combination of academic institution, aid year, and career to another.

Related Links

Listing Valid Careers for the Aid Year

Establishing Defaults

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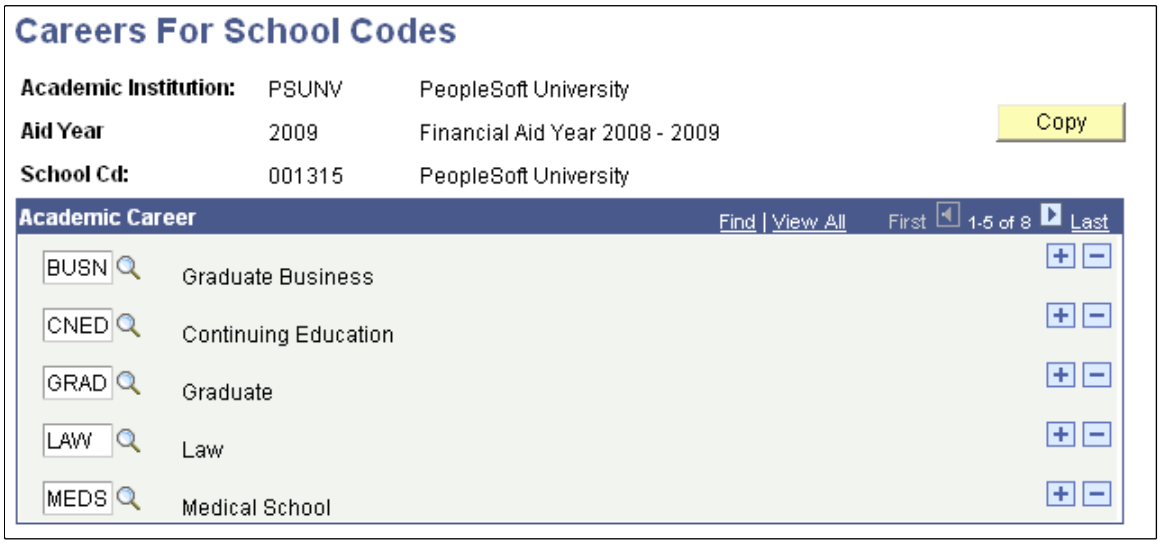
Associating Careers with School Codes

Access the Careers For School Codes page (Set Up SACR, Product Related, Financial Aid, Aid Year, Careers for School Codes).

Image: Careers For School Codes page

This example illustrates the fields and controls on the Careers For School Codes page. You can find definitions for the fields and controls later on this page.



Aggregate Aid processing uses this information about school codes and careers to track a student's financial aid history at your institution. The loan system uses this information to create loan institution records during setup.

Academic Career Select an academic career that is valid for the displayed aid year and school code. You can select only academic careers that you have defined as valid for the displayed aid year on the Valid Careers for Aid Year page.

Copy Click this button to access the Copy Careers for School Code page and copy valid careers from one combination of academic institution, aid year, and school code to another.

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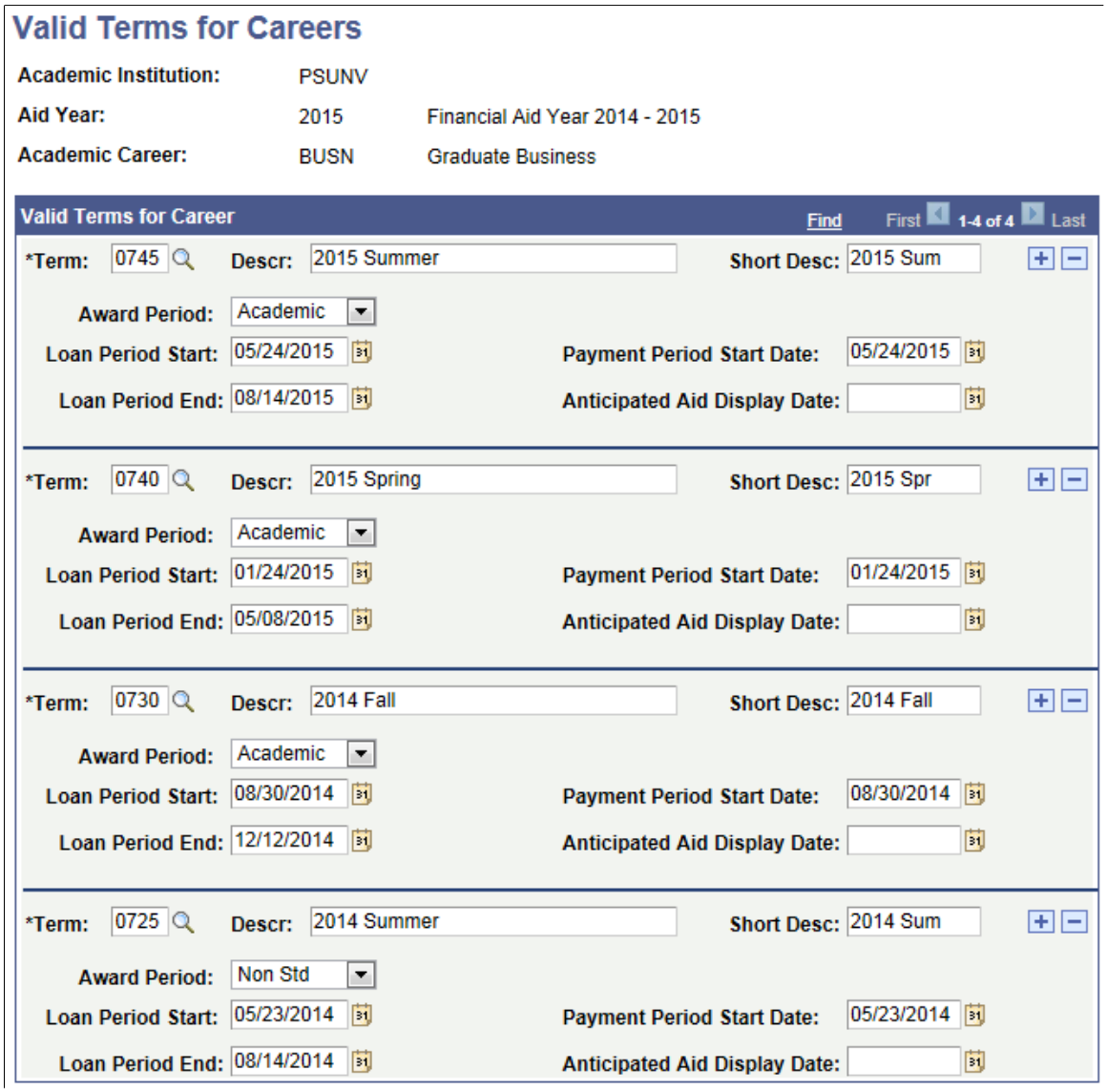
Defining Valid Terms for Careers

Access the Valid Terms for Careers page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Terms for Careers).

Image: Valid Terms for Careers page

This example illustrates the fields and controls on the Valid Terms for Careers page. You can find definitions for the fields and controls later on this page.



Defining the valid terms for each financial aid career provides the system with general guidelines for awarding and processing financial aid within the academic year.

Term

Select a term for which financial aid is awarded. Values include only the terms identified in the Term/Session Table (TERM _TABLE) for the career. After you enter a term value and exit the field, the Descr and Short Desc fields are populated automatically. These values are defined on the Term Values Table page (TERM_VALUES_XREF).

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Note: FA Term uses the valid careers for aid year and valid terms for career setup tables to determine which aid year a term should be linked to. If you set up future terms, you must set up the corresponding aid year for those future terms. For example, if you had not set up 2006-2007 and were to run FA Term only for 2005-2006, the system would not recognize a term outside of the 2005-2006 academic/aid year.

Award Period

Select a term or set of terms associated with a period of enrollment for the purposes of need analysis and awarding. The term's award period supplements the EFC adjustment calculation as it relates to calculations that are not nine-month calculations. Packaging uses the award period to apply active or passive mode correctly during multiple award period processing. It is also used to manage the type of data to extract for the financial aid notification (FAN) letter.

Academic: Indicates that the term is part of the standard academic year, and is generally associated with the nine-month EFC calculation. This is the default value.

Non Std (nonstandard): Indicates that the term is a nonstandard term, such as an inter-session or summer term, and is generally associated with calculations that are other than nine-month EFC calculations.

Loan Period Start and **Loan Period End**

Select the dates that the loan period begins and ends. Student Records supplies default dates. These dates are required for each term to build a valid loan period dynamically. The start date should correspond to the first day of instruction for the term and the end date should correspond to the last day of instruction for the term. When the Loan Origination record is built, the system calculates the loan period using the earliest loan period start date and latest loan period end date from the terms contained within the disbursement plan assigned to the loan award.

You can change period start and end dates at a student's individual loan origination level.

Payment Period Start Date

Select the Payment Period Start Date. The initial value defaults to the Loan Period Start date. Any update to the Loan Period Start date on this page also updates the Payment Period Start Date automatically; however, users can specify a different Payment Period Start Date.

Anticipated Aid Display Date

SSF_FINANCIALS web service uses the value in this field to determine whether or not to extract information about anticipated aid.

If you set a date, SSF_FINANCIALS web service uses the value in this field as the starting date from which to extract information about anticipated aid until the expiration of the aid.

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If you do not set a date, SSF_FINANCIALS web service is unable to extract information about anticipated aid.

See "Using the SSF_FINANCIALS Web Service *(PeopleSoft Campus Solutions 9.0: Student Financials)*".

Related Links

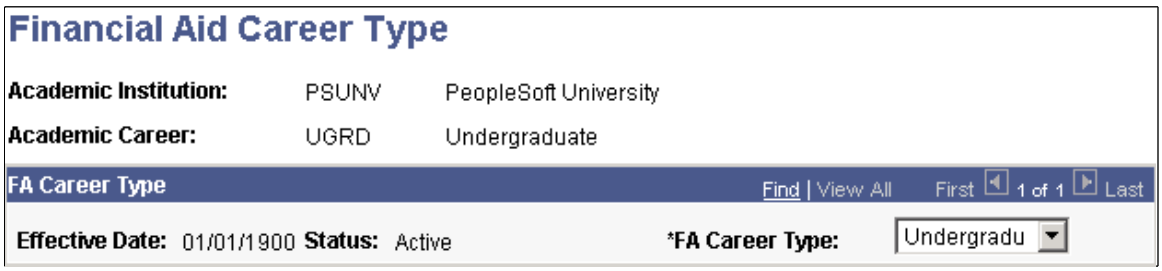
"Defining Term Values (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"
"Setting Up Time Periods (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"
"Defining Enrollment Action Reasons (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"
"Defining Terms, Sessions, and Session Time Periods (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"
Understanding Passive/Active Mode in Multiple Award Period Processing

Assigning Financial Aid Career Types

Access the Financial Aid Career Type page (Set Up SACR, Product Related, Financial Aid, Financial Aid Terms, Define Career Types, Financial Aid Career Type).

Image: Financial Aid Career Type page

This example illustrates the fields and controls on the Financial Aid Career Type page.



When a student has more than one academic career, Financial Aid Term statistics are combined for all academic careers that have the same financial aid career type. For example, if a student has two academic careers (undergraduate engineering and undergraduate) and the FA Career Type field is *Undergraduate* for both academic careers, Financial Aid Term statistics are combined for the two academic careers.

If the FA Career Type field is *not* the same for a student with multiple academic careers, the academic career primacy rules are used. The term statistics for the academic career with the higher primacy is used for the FA Term data. The term statistics for the academic career with the lower primacy are defined as other; you can view these statistics on the FA Term Other Units page.

The FA Career Type field is located on ACAD_CAR_TBL.

Note: If you do not assign financial aid career types, the system associates all academic careers with the *Undergraduate* career type by default and combines statistics for all your academic careers.

FA Career Type

Select the financial aid career type to associate with the displayed academic career. You have only one active effective-dated row for each academic career. If you need to change the career type associated with the academic career, select a different value in this field. The Financial Aid system delivers

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the following translate values; you can add additional translate values:

E: Extended Education.

G: Graduate.

P: Professional.

U: Undergraduate. This is the default value.

Activating an Aid Year for a Student

This section discusses how to:

- Activate an aid year manually.
- Activate an aid year in batch.

Loading electronic data for the student automatically activates the student for the aid year. If you do not expect to use electronic data from an outside source such as ISIR or PROFILE, you can manually activate an aid year for an individual student or a group of students.

For example, if you need to post external awards, such as outside scholarships or Student Financial transactions, before ISIR or PROFILE activity, you can activate the aid year using the batch process for that selected population.

Pages Used to Activate an Aid Year for a Student

Page Name	***Definition Name***	***Navigation***	***Usage***
Student Aid Year Activation	AID_YEAR_ACTIVATE	Financial Aid, Aid Year Activation, Manage Financial Aid Years, Student Aid Year Activation	Activate an aid year for a student manually.
Aid Year Activate	SFA_RUNCTL_ACTADYR	Financial Aid, Aid Year Activation, Process Financial Aid Years, Aid Year Activate	Activate an aid year for a student in batch.

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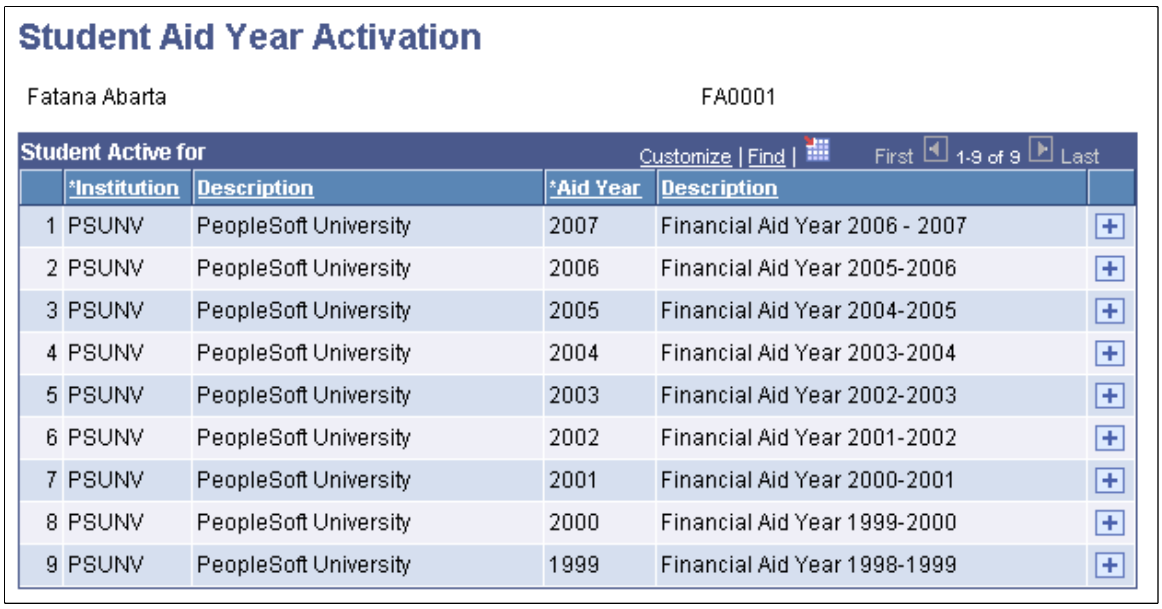
Activating an Aid Year Manually

Access the Student Aid Year Activation page (Financial Aid, Aid Year Activation, Manage Financial Aid Years, Student Aid Year Activation).

Image: Student Aid Year Activation page

This example illustrates the fields and controls on the Student Aid Year Activation page.



Student Aid Year Activation

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Student Active for Customize | Find | First 1-9 of 9 Last

	*Institution	Description	*Aid Year	Description
1	PSUNV	PeopleSoft University	2007	Financial Aid Year 2006 - 2007
2	PSUNV	PeopleSoft University	2006	Financial Aid Year 2005-2006
3	PSUNV	PeopleSoft University	2005	Financial Aid Year 2004-2005
4	PSUNV	PeopleSoft University	2004	Financial Aid Year 2003-2004
5	PSUNV	PeopleSoft University	2003	Financial Aid Year 2002-2003
6	PSUNV	PeopleSoft University	2002	Financial Aid Year 2001-2002
7	PSUNV	PeopleSoft University	2001	Financial Aid Year 2000-2001
8	PSUNV	PeopleSoft University	2000	Financial Aid Year 1999-2000
9	PSUNV	PeopleSoft University	1999	Financial Aid Year 1998-1999

Use this page to create and manage aid years for an individual student ID. After you add a row, enter an aid year to activate and save your work.

Important! Before activating an aid year for a student, ensure that the student has personal, biographical, and demographic data in PeopleSoft Campus Community. To verify this information or add the student, select Campus Community, Personal Information, Biographical.

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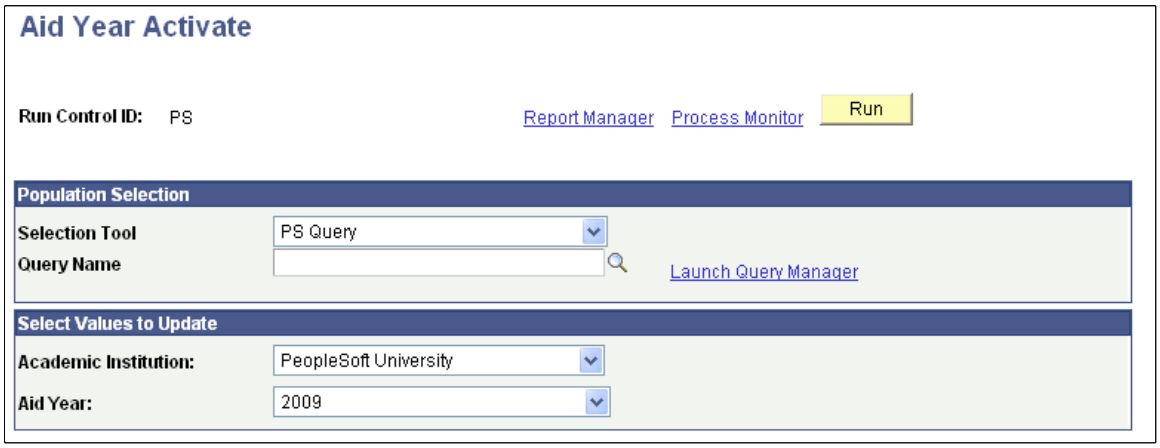
Activating an Aid Year in Batch

Access the Aid Year Activate page (Financial Aid, Aid Year Activation, Process Financial Aid Years, Aid Year Activate).

Image: Aid Year Activate page

This example illustrates the fields and controls on the Aid Year Activate page. You can find definitions for the fields and controls later on this page.



Use the Aid Year Activate process to create an aid year for a group of students.

Population Selection

Selection Tool Select from *Equation Engine*, *PS Query*, or *External File*. Additional parameters are displayed for your selected tool.

Query Name Appears only when *PS Query* is selected. Select a population selection query that joins with the bind record SFA_ACTADYR _BND.

Select Values to Update

Academic Institution Enter the academic institution that the student is attending during the aid year.

Aid Year Enter the aid year that you want to activate for the student.

Reviewing NSLDS Codes

To set up NSLDS codes, use the Maintain NSLDS Codes component (NSLDS_CODES1).

This section discusses how to review the NSLDS Code Table.

The U.S. Department of Education defines the NSLDS loan status codes, which are updated each year in a regulatory release. The NSLDS database is maintained by the Department of Education and provides a

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student's complete Pell Grant and loan history and their current status. You can view NSLDS status codes in the View NSLDS History component.

Page Used to Review NSLDS Codes

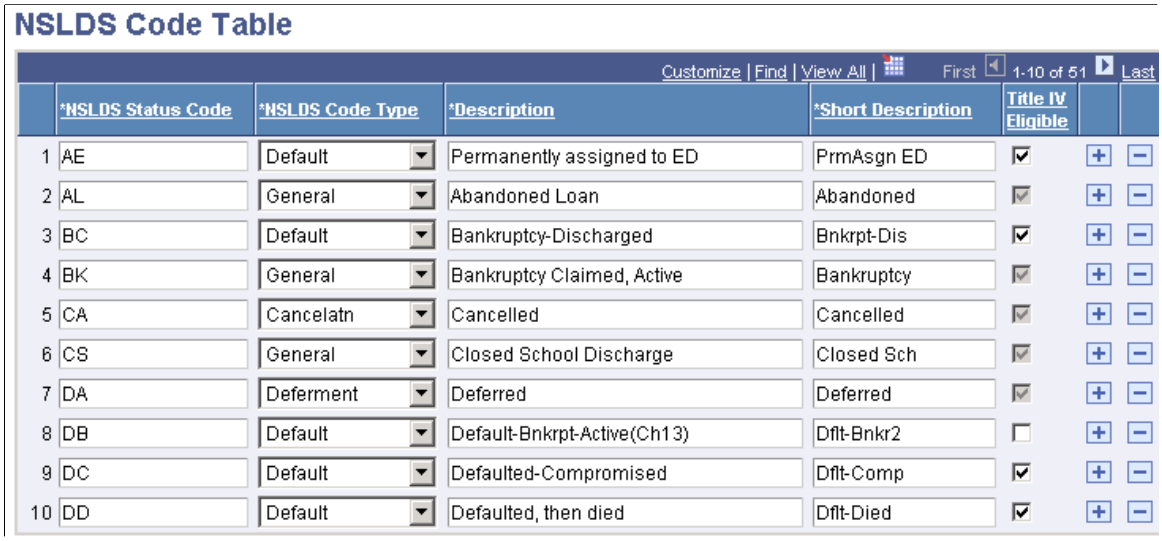
Page Name	*Definition Name*	*Navigation*	*Usage*
NSLDS Code Table	NSLDS_CODE_TABLE	Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain NSLDS Codes, NSLDS Code Table	Review the NSLDS codes.

Reviewing the NSLDS Code Table

Access the NSLDS Code Table page ((Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain NSLDS Codes, NSLDS Code Table).

Image: NSLDS Code Table page

This example illustrates the fields and controls on the NSLDS Code Table page. You can find definitions for the fields and controls later on this page.



NSLDS Code Table

Customize | Find | View All | First 1-10 of 51 Last

	*NSLDS Status Code	*NSLDS Code Type	*Description	*Short Description	Title IV Eligible
1	AE	Default	Permanently assigned to ED	PrmAsgn ED	☑
2	AL	General	Abandoned Loan	Abandoned	☑
3	BC	Default	Bankruptcy-Discharged	Bnkrpt-Dis	☑
4	BK	General	Bankruptcy Claimed, Active	Bankruptcy	☑
5	CA	Cancelatn	Cancelled	Cancelled	☑
6	CS	General	Closed School Discharge	Closed Sch	☑
7	DA	Deferment	Deferred	Deferred	☑
8	DB	Default	Default-Bnkrpt-Active(Ch13)	Dflt-Bnkr2	☐
9	DC	Default	Defaulted-Compromised	Dflt-Comp	☑
10	DD	Default	Defaulted, then died	Dflt-Died	☑

NSLDS Status Code (National Student Loan Data System status code) Displays the two-letter code defined by the U.S. Department of Education.

NSLDS Code Type (National Student Loan Data System code type) Indicates the type of action associated with the status code. A status code can have a type of *Cancelatn* (cancellation), *Default*, *Deferment*, or *General*. This field is for informational purposes only.

Title IV Eligible Indicates whether the NSLDS status code affects eligibility for Title IV aid. Review the default values to determine whether they apply to your institutional business rules. If this check box is selected, the student is still eligible for Title IV aid when the NSLDS status code appears on his or her database record. If the check box is cleared, the student is not eligible for Title IV aid

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when the NSLDS status code appears on their database record. If the check box is unavailable, the NSLDS status code has no effect on eligibility.

This check box is for informational purposes only; no processing is associated with it.

Note: You can change the NSLDS Code Table if you find an error or if the U.S. Department of Education makes midyear regulatory changes.

Defining Aid Year Rollover

To set up aid year rollover, use the Term Values Cross Reference (TERM_VALUES_XREF) and Aid Year Setup (AID_YEAR_SETUP) components.

This section provides an overview of aid year rollover and discusses how to:

- Set up term values cross-reference.
- Set up aid year rollover.
- Review table rollover options.

Understanding Aid Year Rollover

This section addresses many processing setup tables.. After you set up your source processing for the award year, you can use aid year rollover to set up award year processing on an annual basis.

Aid year rollover provides an automated way for you create aid-year-specific setup tables from year to year. Two pages support this process: Aid Year Setup and Term Values Cross Reference. You must follow three steps to initiate this process.

1. Run the Aid Year Setup process (FA_AID_YEAR) to create General Aid Year and Aggregate Aid Limit tables (AGGR_AID_TBL).
2. Populate the Term Values Cross Reference table (TERM_VALUES_XREF).
3. Run the Aid Year Setup process to create remaining tables that are eligible for this process.

   You can use the Aid Year Setup page (RUNCTL_AID_YEAR) to define the setID, institution, and aid year that you want to copy from one aid year to the next. In addition, the system provides options for effective date usage, rollover for active or inactive rows, and a choice of tables to be copied forward to a target year.

The following dependencies are built into this process:

1. You must create or process General Aid Year tables first.
2. You can select General Aid Year and Aggregate Aid limits at the same time.

   If you select both, the system always runs General Aid Year before Aggregate Aid Limits.

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3. You cannot run General Aid Year or Aggregate Aid Limits if you have Term Value Cross Reference-dependent setup options activated.

4. All options listed below Term Values Cross Reference depend on setup of the Term Values Cross Reference table.

5. Term Values Cross Reference depends on Term Values and Term/Session setup by records.

   This enables rollover to associate a term from the base year to a term in the target year.

6. You must run FA Term setup (RUN_CNTL_FATRMP) as a single option to check and update the tables as needed for the target year and then proceed with the remaining options.

   Many tables created subsequently use the FA Term tables created as prompt tables.

7. Budget Tables depend on FA Term table creation for career term values.

8. FA item types depend on aggregate aid limits.

   If Aggregate Area is populated in FA Item Type (FINANCIAL_AID_ITEM) for source year, the system verifies that aggregate aid limits are set up for the target year. If the Aggregate Area is blank, the system bypasses the dependency. The rollover of disbursement IDs and disbursement split codes is included in FA Item Type tables setup.

9. Disbursement rules are keyed by FA Item Type and depend on FA Term and FA Item Types table creation.

10. Disbursement Rules setup copies all effective-dated rows from the source year using the same effective dates.

    Therefore, you must adjust the effective dates for the new aid year before you can run the authorization and disbursement processes. Adjust the effective dates in the Disbursement Authorization Calendar, Disbursement Rules: Global, and Disbursement Rules: Item Type components.

11. Packaging table setup depends on the creation of the FA Item Types table.

12. Return of TIV depends on the creation of the Budget table.

13. Loan Tables depend on the creation of the FA Item Types table.

14. Pell payment depends on records setup of ACAD_CAR_TBL and ACAD_PROG_TBL.

Pages Used to Define Aid Year Rollover

Page Name	***Definition Name***	***Navigation***	***Usage***
Term Values Cross Reference	TERM_VALUES_XREF	Set Up SACR, Product Related, Financial Aid, Aid Year, Term Values Cross Reference	Set up term value cross-reference to process all rollover options except for General Aid Year and Aggregate Aid Limits.

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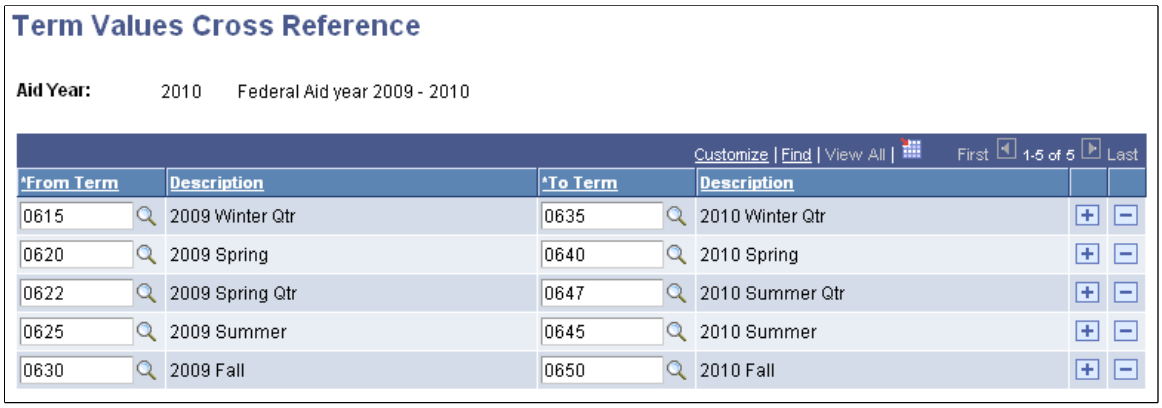
Page Name	*Definition Name*	*Navigation*	*Usage*
Aid Year Setup	RUNCTL_AID_YEAR	Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup	Create aid-year—specific setup tables from year to year.

Setting Up Term Values Cross Reference

Access the Term Values Cross Reference page (Set Up SACR, Product Related, Financial Aid, Aid Year, Term Values Cross Reference).

Image: Term Values Cross Reference page

This example illustrates the fields and controls on the Term Values Cross Reference page. You can find definitions for the fields and controls later on this page.



Set up the Term Values Cross Reference page to process all options except General Aid Year and Aggregate Aid Limits. Confirm that your records department has set up term values for the target aid year being created and has also associated each term with the appropriate career in the Term/Session table. Term values that are set up in Cross Reference that do not exist in Student Records are not created for the tables being processed. Verify term setup in Student Records before you set up your Term Values Cross Reference.

From Term Enter the terms from your source year.

To Term Enter the terms to be created by associating them with the appropriate From Term value.

Setting Up Aid Year Rollover

Access the Aid Year Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup).

Image: Aid Year Setup page

This example illustrates the fields and controls on the Aid Year Setup page. You can find definitions for the fields and controls later on this page.

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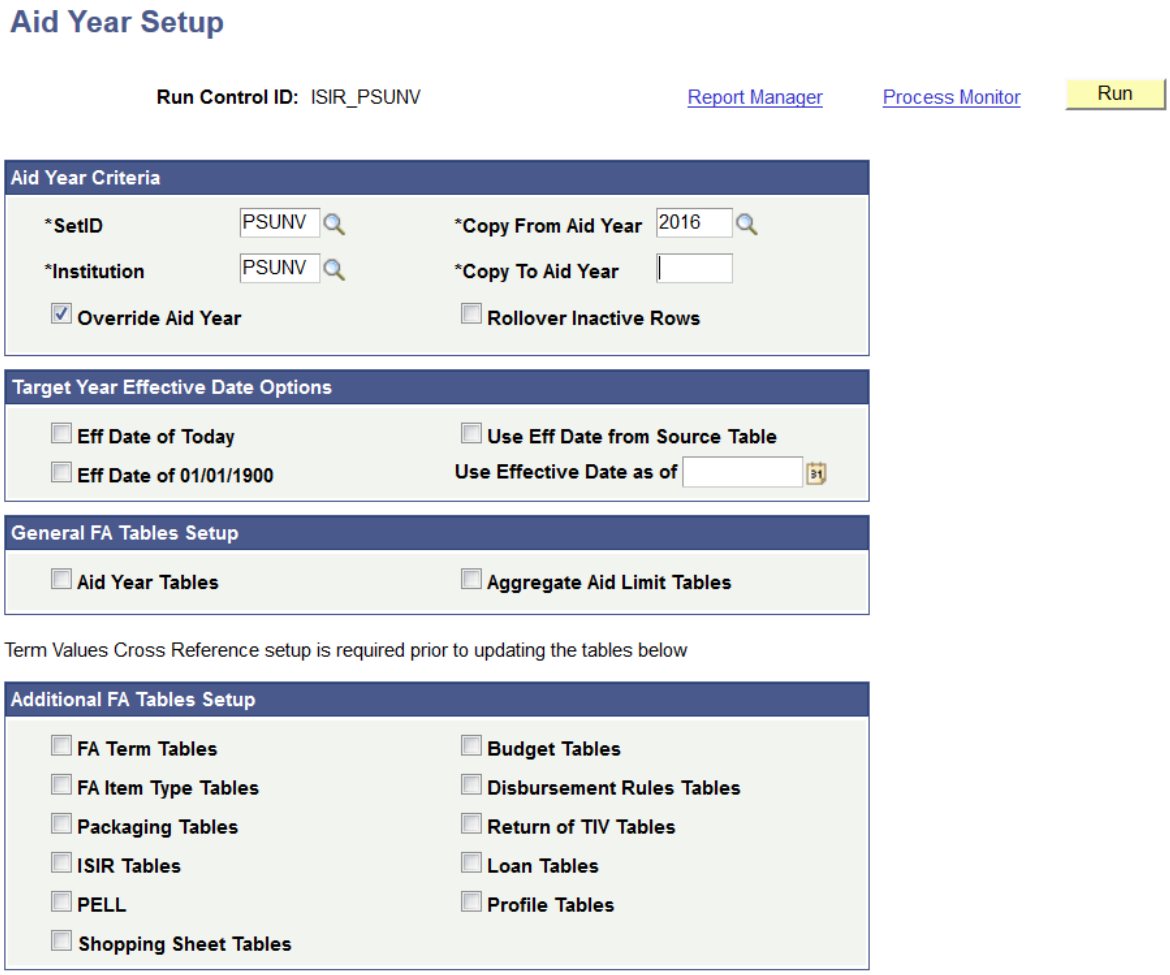

Note: You must perform a separate aid year rollover for each set of setID and institution combinations.

After selecting your rollover options, click the Run button to run the FA_AID_YEAR process.

Carefully review the message log generated by this process. Although you can access the message log several ways, to get additional details, click Process Monitor to locate the appropriate process instance for this process. Click Details and then click Message Log. For each process action, you can click Explain to review additional information about the action taken or the action that you might need to take.

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Aid Year Criteria

SetID

Select the setID. In cases in which institution and setID are keys, the system rolls only those rows found that match on both the setID and institution. For example, the Loan Fee Table is keyed by setID and institution, so if you specify SetID = GLAKE Institution = PSUNV, the system does not create rows for SetID of PSUNV with Institution PSUNV for the aid year created by the process.

Institution

Select the institution to process the source year and copy to the target year.

Copy From Aid Year

Select the source aid year.

Copy To Aid Year

Select the target aid year.

Override Aid Year

Select to override setup tables in the target year for which they might already be created. When you select this check box, the system rolls over a new record along with records that have already been rolled over. If you have updated the tables in the target year either manually or after you have run the aid year process, and you run aid year rollover again with this check box selected, the system overwrites the updated target data with source year data. If the check box is cleared and you have made changes to the source year data, the system does not roll these changes forward to the target year if the target table has already been created.

The Override Aid Year option works differently for budgets. When you select the Budget Table option and Override Aid Year is not selected, the system rolls forward only new rows added in the source year to the target year. This way, data that has been rolled previously is preserved, and the system adds new source year data to it.

Rollover Inactive Rows

Select to roll forward to the target year an inactive row if it is the latest row in the table being processed. If you select this option for disbursement rules or budgets, the system rolls forward any inactive row in the source year to the target year. The system assigns any inactive rows created in the target year an inactive status.

Bundle 39

Added “Use Effective Date as of” field.

Target Year Effective Date Options

Eff Date of Today (effective date is today's date)

Select to insert the current date for all effective-dated rows created except for disbursement rules and budgets.

Use Eff Date from Source Table (use effective date from the source table)

Select to insert the date used in base year rows for all effective-dated rows created in the target year.

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Eff Date of 01/01/1900 (effective date of January 1, 1900)	Select to (with the exception of disbursement rules and budgets) roll forward only the latest effective-dated row from the source year to the target year. The process rolls over rows to the new aid year using one of three effective-dated choices, and if applicable, existing sequence, process, criteria, and so on. For disbursement rules and budgets, the process rolls forward all active rows and always uses the source date as the effective date. You must manually adjust these dates. For all options, the process does not roll over inactive rows unless you select the Rollover Inactive Rows option.
Use Effective Date as of **Bundle 39: New field.**	Select a static date as the Effective Date for all effective-dated rows except for disbursement rules and budgets. **Note:** If you specify a date in this field, you cannot select any of the other Target Year Effective Date Options.

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General FA Tables Setup

Aid Year Tables	Select to move general Aid Year source tables to target year tables. You must run General Aid Year first.
Aggregate Aid Limits	Select to move Aggregate Aid Limits source tables to target year tables. You can select Aggregate Aid Limits to run with General Aid Year tables. If you select both, the system always runs General Aid Year tables before Aggregate Aid Limits.

Additional FA Tables Setup

Before you can update any of the following tables, you must set up the Term Values Cross Reference page (Set Up SACR, Product Related, Financial Aid, Aid Year, Term Values Cross Reference).

FA Term Tables (financial aid term tables)	Select to move FA Term source tables to target year tables. Run FA Term setup as a single option to check and update the tables as needed for the target year and then proceed with the remaining options.
Budget Tables	Select to move Budget source tables to target year tables. Budget tables depend on FA Term table creation for career term values.
FA Item Type Tables (financial aid item type tables)	Select to move FA Item Type source tables to target year tables. FA Item Types depend on Aggregate Aid Limits. If Aggregate Aid Limits do not exist in the source and target year, the system bypasses the dependency. The rollover of disbursement IDs and split codes is included in FA Item Type tables setup.
Disbursement Rules Tables	Select to move Disbursement Rules source tables to target year tables. Disbursement Rules are keyed by FA Item Type and depend on FA Term and FA Item Type table creation. Disbursement Rules setup copies all effective-dated rows from the source year using the same effective dates. Thus, you must adjust the effective dates for the new aid year before you can run the authorization and disbursement processes. Adjust the effective dates in the Disbursement Authorization Calendar, Disbursement Rules: Global, and Disbursement Rules: Item Type components.
Packaging Tables	Select to move Packaging source tables to target year tables. Packaging table setup depend on FA Item Types table creation.

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Return of TIV Tables	Select to move Return of TIV source tables to target year tables. Return of TIV depends on Budget Table creation.
ISIR Tables (Institutional Student Information Record tables)	Select to move ISIR source tables to target year tables. You cannot run this process without first setting up the Term Values Cross Reference.
Loan Tables	Select to move Loan source tables to target year tables. Loan tables depend on FA Item Types table creation. You cannot run this process without first setting up the Term Values Cross Reference. Loan Tables includes the CL4 Loan Destination Profile tables. Because CL4 Loan Destination Profiles cannot be deleted or inactivated, the process copies data to the target year even though loan agencies associated with the destination might no longer be valid, making the destination itself invalid. To avoid copying invalid CL4 Loan Destination Profiles, the process compares each loan agency (Lender/Guarantor/Servicer) associated with the loan destination against Loan Agency Defaults setup. If any loan agency OPEID from the CL4 Loan Destination Profile matches an OPEID setup on the Loan Agency Defaults page, the destination is not copied to the target year. **Note:** During the Aid Year Setup process, the Loan Agency Default tables are copied before the CL4 Loan Destination Profile tables are copied. This enhancement uses Loan Agency Default values from the target year when comparing OPEIDs.
PELL/ACG/SMART Tables (Pell, Academic Competitiveness Grant , and National Science and Mathematics Access to Retain Talent grant tables)	Select to move Pell Payment source tables, ACG/SMART Setup tables, and the HERA Academic Level Setup page to target year tables. Pell Payment depends on Records setup of ACAD_CAR _TBL and ACAD_PROG_TBL. You cannot run this process without first setting up the Term Values Cross Reference.
Profile Tables	Select to move PROFILE source tables to target year tables. You cannot run this process without first setting up the Term Values Cross Reference.
Shopping Sheet Tables	Select to move Shopping Sheet source tables to target year tables. Oracle recommends that you roll over the Budget and FA Item Type tables prior to rolling over Shopping Sheet tables.

Reviewing Table Rollover Options

The following tables are eligible for rollover for the new year. The order in which they appear for each setup option is the processing order.

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General Aid Year

This table displays rollover options for general aid year:

Record Name	***Page Name***
FED_AID_YR_TBL	Federal Aid Year Table
AID_YEAR_TBL	Aid Year Table
AID_YEAR_CAREER	Valid Careers for Aid Year
AID_YEAR_PROG	Valid Programs for Aid Year
TIV_SCHOOL_TBL	School Code Table
INST_SCHOOL_CDS	School Codes for Institution
SCHOOL_CAREER	Careers for School Codes
FA_APP_SRC_TYP	Application Source Rank
FA_APP_SRC_TBL	Application Source Rank
FA_APP_SRC_RANK	Application Source Rank
SS_FA_INSTALL	Self-Service Options

Aggregate Aid Limits

This table displays rollover options for aggregate aid limits:

Record Name	***Page Name***
AGGR_LIMIT_TBL	Aggregate Aid Limits
AGGR_LVL_LIMITS	Aggregate Aid Limits

FA Term

This table displays rollover options for FA Term:

Record Name	***Page Name***
FATRMP_CAREER	FA Term Setup
FATRMP_CAR_TRM	FA Term Setup
AID_YR_CAR_TERM	Valid Terms for Career

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Budgets

This table displays rollover options for budgets:

Record Name	***Page Name***
RUN_CNTL_BDGT_P	Budget Assign Run Control
BUDGET_CATG_TBL	Budget Categories
BDGT_ASIGN_CNTL	Budget Assignment
RUN_CNTL_FABDGT	Budget Assign Run Control
BDGT_ASIGN_TERM	Budget Assignment
BUDGET_ITEM_TBL	Budget Items
BUDGET_GRP_TBL	Budget Groups
BUDGET_ITEM	Budget Items
BDGT_TREE_CATG	Budget Trees
BDGT_FORMLA_TYP	Budget Formulas
BDGT_FORMLA_TBL	Budget Formulas
BDGT_FORMLA_DFN	Budget Formulas
BDGT_TREE_TBL	Budget Trees
BDGT_FRMULA_GRP	Budget Formulas
BDGT_ASIGN_CATG	Budget Assignment

FA Item Type Tables

This table displays rollover options for FA item types:

Record Name	***Page Name***
ITEM_TYPE_FA	Financial Aid Item Types
ITEM_TYPE_FISCL	Fiscal Item Type
ITM_TP_TERM_LMT	Financial Aid Item Types
LN_FEE_TBL	Loan Fee Table

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Record Name	*Page Name*
ITEM_TYP_FA_FEE	Financial Aid Item Types
DISB_PLAN_TBL	Disbursement Plan Table
DISB_ID_TBL	Disbursement ID Table
DISB_SPLIT_CD	Disbursement Split Codes
DISB_ID_SPLIT	Disbursement Split Code Formulas
ITEM_TP_FA_DISB	Financial Aid Item Types
AWD_MESSAGE_TBL	Award Messages

Disbursement Rules

This table displays rollover options for disbursement rules:

Record Name	*Page Name*
DISB_CAL_TBL	Disb/Authorization Calendar
AUTH_CAL_TBL	Disb/Authorization Calendar
AUTH_CAL_DATA	Disb/Authorization Calendar
DISB_CAL_DATA	Disb/Authorization Calendar
DISB_RULE_GLB	Disbursement Rules Global
DISB_RULE_SRV	Disbursement Rules Global
DISB_RULE_ITM	Disbursement Rules Item Type
DISB_RULE_CHK	Disbursement Rules Item Type
DISB_RULE_ITS	Disbursement Rules Item Type
DISB_RULE_USR	Disbursement Rules Global
DISB_RULE_ITU	Disbursement Rules Item Type
DISB_RULE_TRK	Disbursement Rules Global
DISB_RULE_ITK	Disbursement Rules Item Type

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Packaging

This table displays rollover options for packaging:

Record Name	***Page Name***
AWD_ADJ_RSN_TBL	Award Adjustment Reasons
FA_INST_DEFN	Institutional Mass Packaging
FA_INST_CRIT	Institutional Mass Packaging
FA_INST_CRITLST	Institutional Mass Packaging
PKG_RTNG_CMP_TBL	Packaging Rating Components
PKG_EQUITY_LMT	Pkg Equity Item Types
PKG_EQUITY_ITM	Pkg Equity Item Types
PKG_REL_ITM_TBL	Pkg Related Item Type Group
PKG_REL_ITM_TYP	Pkg Related Item Type Group
PKG_PLAN_TBL	Packaging Plan
PKG_RULE_TBL	Packaging Plan
FA_BPKG_DEFN	Mass Packaging Definition
FA_BPKG_CRIT	Mass Packaging Definition
FA_BPKG_CRITLST	Mass Packaging Definition
RSTRC_AID	Restricted Aid Table
RSTRC_AID_ORG	Restricted Aid Table
RSTRC_AID_COM	Restricted Aid Table
RSTRC_AID_MEM	Restricted Aid Table

Return of Title IV

This table displays rollover options for return of Title IV:

Record Name	***Page Name***
RTRN_TIV_SETUP	Return of TIV RULES

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Record Name	*Page Name*
RTRN_TIV_SETUP0	Return of TIV RULES
RTRN_TIV_SETUP2	Return of TIV RULES
RTRN_TIV_SETUP3	Return of TIV RULES

ISIR

This table displays rollover options for ISIR:

Record Name	*Page Name*
ISIR_SRCH_ADD	ISIR Data Load Parms
ISIR_SRCH_PRM	ISIR Data Load Parms
ISIR_INST_CNTRL	ISIR Data Load Parms
INAS_FM_ASMPTN	INAS Assumption Codes

Loans

This table displays rollover options for loans:

Record Name	*Page Name*
LN_TYPE_TBL	Loan Type Table
LN_TO_NSLDS_TYP	Loan Type Table
LN_ITEM_TBL	Loan Type Table
LN_RPT_ITEM	Loan Report Definitions
LN_PNOTE_TBL	Loan Type Table
LN_RPT_COL	Loan Report Definitions
LN_ACTNTYPE_TBL	Loan Action Code Table
LN_ACTN_PRG_TBL	Loan Action Code Table
LN_ACTNMSG_TBL	Loan Action Code Table
LN_ACTNCD_TBL	Loan Action Code Table
LN_DESTPROF_TBL	Loan Destination Profile

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Record Name	***Page Name***
LN_DEST_CATGRY	Loan Destination Profile
LN_DEST_EDIT	Loan Destination Profile
LN_INSTUTN_TBL	Loan Institution
LN_INSTN_CNTACT	Loan Institution
LN_INST_DEST	Loan Institution
LN_EDIT_DFLT	Loan Edit Defaults
LN_EDITDFLT_DTL	Loan Edit Defaults
LN_RPT_PKG	Loan Report Packages
LN_RPT_LNK02	Loan Report Packages
LN_DL_CHG_XREF	Direct Lending Change fields
LN_DL_INST_PARM	Loan DL Inst Change Hold/Susp
LN_PN_TYPE_TBL	DL Serial Prom Note Table
LN_EDIT_TBL	Loan Edits/Messages
LN_AGENCY_DFLT	Loan Agency Defaults
SFA_COD_LN_ATTD	Attended School Routing ID
SFA_LNDR_SEL	Lender Select Setup
SFA_LNDR_DTL	Lender Select Detail
SFA_LN_DTL	Lender Select Detail
SFA_LN_CNSL_SU2	Loan Item Type

Pell/ACG/SMART Tables

This table displays rollover options for Pell payment , ACG grant, and SMART grant:

Record Name	***Page Name***
PELL_PMT_OPTION	Pell Payment Setup
PELL_PMT_CAREER	Pell Payment Detail

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Record Name	***Page Name***
PELL_ATTENDING	Pell ID Attending
PELL_COMNT_TBL	Pell Comment Codes
SFA_ASG_PARMS	ACG/SMART Processing Options
SFA_ASG_SETUP	ACG/SMART Reporting Options
SFA_ASG_HS_PROG	ACG State Program Codes
SFA_ASG_CIP_CD	Eligible CIP Codes for SMART
SFA_ASG_AL_TBL	HERA Academic Level Rules Setup

PROFILE

This table displays rollover options for PROFILE:

Record Name	***Page Name***
INAS_IM_ASMPTN	INAS Assumption Codes
INST_LOAD_CNTRL	PROFILE Data Load Parms

Shopping Sheet

This table displays rollover options for Shopping Sheet.

Record Name	***Page Name***
SFA_SS_SETUP	Group Options & Institution Information
SFA_SS_SETUPCOA	Budget Mapping
SFA_SS_SETUPAWD	Award Mapping (Award Group Mapping)
SFA_SS_SETUPAW2	Award Mapping (Item Type Inclusion Exceptions)

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