Oracle's PeopleSoft 9.0 Financial Aid Updates and Changes for CS Bundle #39 Regulatory Release 1 2016-2017

October 2015

CS Updates and Changes for Bundle #39, Regulatory Release 1 2016-2017

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Updates for CS 9.0 Bundle #39, Regulatory Release 1 2016-2017

Note. This PDF package is an update to the PeopleSoft Financial Aid 9.0 PeopleBook and other related Campus Solutions PeopleBooks as noted. It describes the Patch ID # 21378889 / Product Update ID # 922381 that was posted to My Oracle Support in October 2015. Use this PDF package in conjunction with your PeopleBook to maintain a complete set of documentation.

Use this Overview document to view a list of the bundle changes and updated chapters.

Using PDF Package (PDF Portfolio) Documentation

These instructions are for Adobe Reader XI, with the latest updates installed (In Adobe Reader, click Help, Check for Updates).

The package opens with this Overview document that lists the bundle changes and updated chapters.

Click the Files tab to view the list of chapters.

To search for documentation about the changes within a particular chapter, open the chapter and press CTRL + F. Enter “bundle xx” where xx is the bundle number, and click Next.

You can search the entire package for documentation updates in the Files or Layout view.

As of Bundle 33, cross references in PDF chapters appear as follows:

- If a cross reference is to a topic in the same book (for example, Campus Community topic A contains a cross reference to Campus Community topic B), the cross reference displays only the topic title.
- If a cross reference is to a topic in a different book, the cross reference displays the topic title and the book name.
- Some cross references appear as links but are actually text-only.

Here is a list of the Bundle 39 changes and the chapters that contain documentation about those changes. Chapters are in the *PeopleSoft Financial Aid 9.0 PeopleBook* unless noted otherwise:

- Added Student Eligibility Code Crosswalk
  - Assessing Eligibility for Financial Aid.pdf
- Expanded Target Year Effective Date Options
  - Setting Up Your Financial Aid Awarding Cycle.pdf
- Added ability to update NSLDS Total with Population Update
  - Preparing for Awarding and Packaging.pdf
  - Using the Population Selection Process.pdf (Campus Community PeopleBook)
- Added ability to distinguish between Federal and Institutional methodologies in Mass Packaging
  - Awarding and Packaging Students.pdf
  - Managing Repackaging.pdf

- Updates to Return of Title IV Funds
    - Processing Return of Title IV Funds.pdf

- ISIR Updates
    - Preparing for Awarding and Packaging.pdf
    - Defining Application Processing Options.pdf
    - Processing Federal Financial Aid Applications.pdf

- Added the ability to delete manually added PROFILE records.
    - Processing and Using Institutional Financial Aid Applications.pdf

Updates Not Called Out in Documentation

ISIR Updates for 2016-2017

- Updated the system for 2016-2017 ISIR processing. These updates are based on the September 2015 Draft 2016–2017 ISIR Record Layouts. Additional updates might be necessary when the final 2016–2017 EDE Technical Reference Guide is published (usually in October) and reviewed. Updates are usually delivered in the following bundle.
- Updated the inbound programs to inbound and load 2016–2017 ISIR files.
- Delivered new ISIR Suspense Management and ISIR Correction Management components to manage 2016–2017 ISIRs.
- Moved “Correct 2013-2014 ISIR” to Financial Aid History.

NOTE! FM INAS for 2016-2017 from the College Board was not available in time to be included in this bundle so INAS calculations during ISIR Load will not occur. Until FM INAS is available, do not select the Call INAS check box. When FM INAS is delivered, all ISIRs loaded with this setting can be processed using the batch INAS Calculation process.

NOTE! Final 2016-2017 ISIR Reject Reasons, ISIR Comment Codes, and ISIR SAR Cross-reference values from the U.S. Department of Education were not available in time to be included in this bundle. For this bundle, the 2016-2017 values are delivered but are just copied from the previous year. After the 2016-2017 values are published, Oracle will deliver an update.

PROFILE/Institutional Application Maintenance for 2016-2017

Annual Aid Year changes include:

- Setup
    - Added 2016-2017 PROFILE Data Load Parameters.

- Processing
  - Added 2016-2017 options for PROFILE Import:
    - Load Records
    - Load Summary
    - Suspense Management
    - Delete PROFILE Records
  - Added “Maintain Application 2016-2017” to Institutional Application Data.
  - Moved “Maintain Application 2013-2014” to Financial Aid History.

INAS IM/EFM Updates for 2016-2017

- Updated the system for 2016-2017 INAS IM/EFM processing.
- Moved “View 2013-2014 IM EFC Detail” and “View 2013-2014 FM EFC Detail” to Financial Aid History.