CHAPTER 1

Managing Financial Aid Terms

This chapter provides an overview of financial aid terms and discusses how to:

- Build financial aid terms online.
- Build financial aid terms manually.
- Build financial aid terms in batch.
- Use the Financial Aid Term Census report.
- Update Financial Aid Progress Units

Understanding Financial Aid Terms

This section lists prerequisites and discusses methods to build financial aid terms.

See Also

lsfa, Setting Up Financial Aid Terms, Understanding Financial Aid Terms

Prerequisites

Before you begin setting up and building financial aid terms, complete the setup tasks discussed in the "Setting Up Financial Aid Terms" chapter.

You must understand level/load rules. These rules determine a student's academic level and academic load and are set up as part of the PeopleSoft Student Records setup. You should jointly set up level/load rules with the student records staff. Financial aid term data is driven by these level/load rules, so you need to know how they are set up for your institution.

Financial aid term data also depends upon career information, including career primacy information, from the Academic Career Table component.

Your institution also needs to have set up academic programs, because financial aid term uses program information when building a student's financial aid term. Financial aid terms are built only for programs that are designated as financial aid eligible.

You should also review the Valid Terms for Careers page. When you select which terms should be built as financial aid terms for each career by the online and background financial aid term process, only the terms defined as valid for each career on this page are available for selection.

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See Also

lsfa, Setting Up Financial Aid Terms

lsfa, Setting Up Your Financial Aid Awarding Cycle, Establishing Careers and Programs, Defining Valid Programs for Aid Year and Career

lsfn, Designing Your Academic Structure, Defining Academic Level and Load Rules

lsfn, Designing Your Academic Structure, Defining Academic Careers

lsfn, Defining Programs, Plans, and Subplans, Defining Academic Programs

Methods to Build Financial Aid Terms

You can build Financial Aid Terms in one of three ways:

- Manually
- Online
- In batch

Use the manual build process when data from Student Records is not available for a student, when you receive new records, or after an add/drop period. To build a financial aid term manually for a student, you must enter all required data in the Financial Aid Term component. The data you enter manually is replaced when term enrollment, program, or admissions data becomes available for the student.

Build terms online if there are records for a student from Student Records and you want to see this data or the changes to this data. Click the Build button on the FA Term page to run the online build process.

Build terms in batch to process multiple students at the same time using data from Student Records or PeopleSoft Recruiting and Admissions (if you choose to build for both updates and projections). To build financial aid terms in batch, create an FA Term driver record and then run the background process using the FA Term driver record on the Build FA Terms page.

Building Financial Aid Terms Online

This section lists common elements and discusses how to:

- Set overrides for financial aid term.
- Build a financial aid term.
- View term build details.
- Override census date locking.
- View academic advisor information.
- View campus information.
- View academic level and load information.
- View HERA academic levels.
- View academic statistics.
- View transfer credit information.

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- View term statistics for a student's other career.
- View a list of the student's classes.
- View loan, graduation, and budget information.
- View changes in a student's FA Term information.
- View Student Records term information.
- View withdrawal information.

Common Elements

Calculated Values This column displays the values calculated by the system during the financial aid term build process for the associated fields. These values are based on the student's enrollment, academic and financial load, and academic level. The calculated values exist only when the FA Term is built online or in batch. If you build the financial aid term manually, the system does not display the calculated values. If you update the values manually, the calculated values do not change.

Seq (sequence) Displays the number automatically assigned when you create a new effective-dated row. The sequence number provides a unique identifier when two rows exist with the same effective date.

Pages Used to Build Financial Aid Terms Online

Page Name	Definition Name	Navigation	Usage
FA Term	STDNT_FA_TERM	Financial Aid, Financial Aid Term, Maintain Student FA Term, FA Term	Build a term or view a student's term information. You can also override the lock on Financial Aid Term values using this page.
FA Term Build Statistics	FA_TERM_STATS_SEC	Click the Build Info link on the FA Term page.	View term build details.
FA Term Census Date Locking	STDNT_FA_TRM_CENDT	Click the Census Date link on the FA Term page.	Override the census date locking feature at the student level. View the locked fields and the value used if you unlock the census date. When you override the census date lock, the override applies only to the term displayed on this page—not the entire aid year. For example, overriding the fall term does not override the spring term.
FA Term Academic Advisor Information	STDNT_FA_ADVIS	Click the Advisor link on the FA Term page.	View or assign the student's academic advisor. This includes data on the advisor's role and committee affiliation.

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Page Name	Definition Name	Navigation	Usage
FA Term Campus Information	STDNT_FA_CAMP_SEC	Click the Campus Info link on the FA Term page.	View or modify the campus (physical location) where the student receives financial aid, registrar, and advising services.
Acad Level (academic level)	STDNT_FA_ACAD_LVL	Financial Aid, Financial Aid Term, Maintain Student FA Term, Acad Level	View, add, or update a student's academic level and load (academic and financial aid) information for a particular term.
HERA Academic Level	STDNT_FA_ASGAL_SEC	Click the View HERA Academic Level link on the Acad Level page.	View a student's HERA academic level calculated by FA Term.
Statistics	STDNT_FA_STATS	Financial Aid, Financial Aid Term, Maintain Student FA Term, Statistics	View, add, or update a student's academic statistics including GPA (grade point average), residency information, and progress for a term.
FA Term Transfer Credits	STDNT_FA_STAT_TC	Click the Transfer Credit link on the Statistics page.	View transfer credit information for a student. This includes transfer credit for test scores on the Advanced Placement test or SAT II tests.
FA Term Other Units	STDNT_FA_STAT_INEL	Click the Other Units link on the Statistics page.	View term statistics for a student's other academic career.
FA Term Class Detail	STDNT_FA_CLASS_SEC	Click the Class Detail link on the Statistics page.	View a list of the student's classes. Indicates whether the classes are Open Entry/Open Exit sessions and providing start and end dates for each class.
Financial Aid Info	STDNT_FA_LOAN	Financial Aid, Financial Aid Term, Maintain Student FA Term, Financial Aid Info	View or modify loan, graduation, and budget information that is relevant to financial aid processing for a term.
FA Term Field Audits	STDNT_FA_AUDIT_SEC	Click the Field Audits link on the Financial Aid Info page.	View changes in a student's FA Term information from the previous effective-dated row.
Records/Term Info	STDNT_FA_REC	Financial Aid, Financial Aid Term, Maintain Student FA Term, Records/Term Info	View or modify the student's Student Records information for a term.

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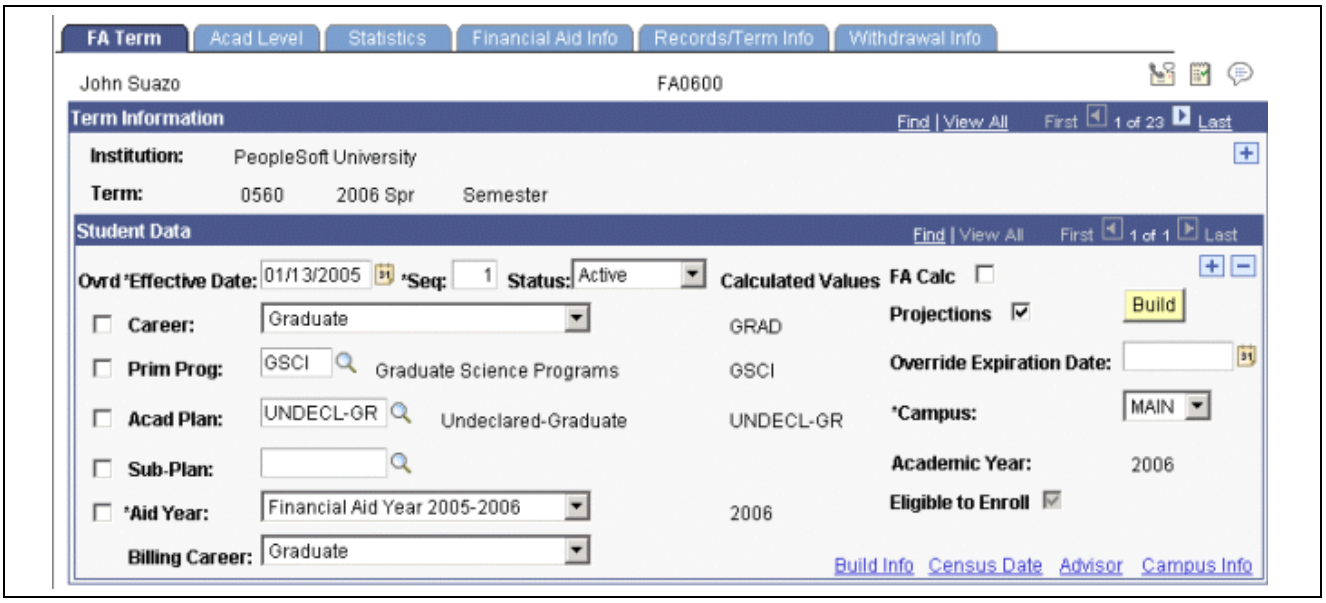
Page Name	Definition Name	Navigation	Usage
Withdrawal Info	STDNT_FA_WITHDRAW	Financial Aid, Financial Aid Term, Maintain Student FA Term, Withdrawal Information, Withdrawal Info	View withdrawal information from Student Records.

Setting Overrides for Financial Aid Term

While the system continues to set override fields automatically by changes in FA term data, you can set or reverse the settings based on your business requirements. When you manually modify FA term information, the system evaluates the selected field and compares the changed value with the corresponding calculated value. If the values are not equal, the system activates the override check box. Conversely, if the values match, the system clears the check box. The FA term build process can also set the override for selected fields when the field value does not match the calculated value. There are no changes to the FA term build process to accommodate the override fields.

Building a Financial Aid Term

Access the FA Term page (Financial Aid, Financial Aid Term, Maintain Student FA Term, FA Term).



FA Term page

Previously, when students had more than one academic plan for their primary academic program, the FA term process evaluated the academic plan value and selected plans in alphabetical order. Now, in these cases, the FA term process uses the academic plan with the lowest academic plan sequence number. This change provides you with the ability to control the plan that is used by the FA term build process. You can use the Student Program/Plan component to reset the plan sequence number so that the next time the FA term process runs, it uses the academic plan that you want.

Term

If you are building terms manually, enter the term value. Otherwise, the Financial Aid Term build process updates this field. The build process only builds terms that are defined for the given aid year.

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Note. FA Term uses the setup tables for Valid Careers for Aid Year and Valid Terms for Career 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 2005-2006 and were to run FA Term only for 2004-2005, the system would not recognize a term outside of the academic/aid year.

Billing Career

The financial aid term build process populates this field with information from the Term Activation page in Student Records. This field is for use in equations (budget or packaging) and any changes made to the field are discarded during the next build. PeopleSoft Student Financials uses the value for billing career from the Term Activation page during tuition calculation.

Career, Prim Prog (primary program), **Acad Plan** (academic plan), **Sub-Plan,** and **Aid Year**

You can override the values in these fields by selecting a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the Override Expiration Date field.

FA Calc (financial aid calculation)

Select to require the financial aid term build process to determine whether changes have occurred to the student's data in Student Records or Admissions (such as enrollment changes). After you have selected this check box, click Save and then click Build. If a change has occurred, this term and all following terms are rebuilt using the new information.

Note. In most cases, the build process automatically determines whether changes have occurred in Student Records information and rebuilds terms with changed records data. This is triggered by changes to fields defined in PS_STDNT_CAR_TE_VW.

Projections

Select to instruct the build process to build a term in projection if necessary. The build process tries to build each term that you have selected on the FA Term Setup page, using a variety of sources. The build process looks for data in the following order:

1. Term enrollment data in Student Records.

   If this data is found, the financial aid term is not built with projected data and has a source of *Term.*

2. Program information for the student in Student Records.

   If this data is found, the financial aid term is built in projection and has a source of *Program.*

3. Program information from the student's application in Recruiting and Admissions.

   If this data is found, the financial aid term is built in projection and has a source of *Admissions.*

If the build process cannot find any of these three sources of information, the financial aid term is built with a source of *No Data.* The financial aid term build process does not build terms in future aid years in projection; it only builds terms in future aid years for which enrollment data exists.

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It is possible to build a projected FA term record of source admission or program for a student who is term activated after the start of the term. The FA Term build process uses the term activation deadline date maintained by Student Records to determine whether a projected FA term record can be built for a student. By default, term activation can occur until the start of the term, but this date can be modified to permit rolling enrollment of students in the term. The Max Program Effdt for Term field in the Term/Session Table component is where you can modify this setting. Verify with your student records staff their term activation policies to determine the effect on financial aid application processing.

Note. You cannot build a term in projections after the financial aid census date has passed. Any terms that are still in projections on the financial aid census date automatically have their values set to zero, with a build source of *No Data.*Additionally, if the student has no financial aid awards and does not have a budget amount greater than zero for the term, the system sets the effective status of the term to *Inactive*. The financial aid census date for each term is entered in the FA Census Date field on the FA Term Setup page.

Override Expiration Date

When you select a value that differs from the value in the Career, Prim Prog, Acad Plan, Sub-Plan, Aid Year, and Billing Career fields, the Financial Aid Build routine does not recalculate the field for the associated term. All override fields, except the HERA WI fields, are recalculated using the calculated values.

To have the build process use Student Records data after a certain date in the term, enter that date in this field. When you run the build process on or after this date, the override values you entered are ignored and data from Student Records is used.

Campus

Indicates the physical location of the administrative services associated with the student's academic program. This value is used to determine the Enrollment School Code that is reported to COD.

See [Setting Up Your Financial Aid Awarding Cycle]Defining Your Campus OPEID Codes.

See [Processing Pell Payments]Reviewing Pell Disbursement Results .

See [Processing Direct Loans]Processing and Reviewing Loan Application Acknowledgement Data .

Eligible to Enroll

For informational purposes only. Displays the same value as the Eligible to Enroll check box on the Term Activation page in Student Records. When selected, the Student Records batch enrollment selects and processes the student.

Build

Click to build a term for the student using the system rules established on the FA Term Setup page. The system builds a term only if Student Records contains data for the student, unless you have selected the Projections check box—then the build process uses projected enrollment data. If one or more of the audited fields have changed, a new effective-dated row is automatically inserted.

See lsfa, Managing Financial Aid Terms, Building Financial Aid Terms Online, Viewing Changes in a Student's FA Term Information.

Build Info

Click to access the FA Term Build Statistics page and view details for the build.

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Census Date	Click to access the FA Term Census Date Locking page and view the census date and fields locked after the census date and override the census date.
Advisor	Click to access the FA Term Academic Advisor Information page and view or enter information regarding a student's advisor. This includes data on the advisor's role and committee affiliation.
Campus Info	Click to access the FA Term Campus Information page and view the student's Financial Aid Campus, Registrar Campus, and Advisement Campus.

Setting Terms to Inactive

Setting the most recent effective-dated FA Term record effectively removes that term from becoming recognized by all other financial aid processes. Rather than delete FA Term rows, you should make rows inactive. If you attempt to set an FA Term to inactive, a warning message appears if the student has a budget for the term. If so, first verify that the student has no awards for the term and make any required adjustments to the student's awards before setting the term inactive. The FA disbursement processes cannot be run for inactive terms. The system displays another warning message if the student has enrollment data for the term.

There is functionality in the FA Term build process where the term source is set to *No Data*—no enrollment data exists for the term after census or the end of the term. If the student has no awards and does not have a budget amount greater than zero for the term, the system sets the term to an *Inactive* status. If, however, the student has an award for the term with either an offered amount, authorized amount, or disbursed amount greater than zero, the term remains in an active status. In addition, future terms recalculate cumulative units, projected levels, NSLDS Lending and Direct Lending loan years and not include data from terms with a source of *No Data* regardless of the status of the term.

Term Progression

Student Records contains functionality that enables you to increment student academic levels by term and not by units to address cooperative system progression rules and graduate studies progression rules. The FA Term Build process recognizes progression by terms.

During the build process, the system checks whether the level determination on the Level/Load Rules Table page is *Units, Terms, Manual,* or *Default.* If the level determination is *Terms,* then the FA Term Build process calculates the academic level, NSLDS Loan Year, and Direct Lending Year using the student's terms in residence.

When you are building terms for projected enrollment, the student's academic load comes from the admissions application or the academic program. The FA Term Build process then uses this academic load to calculate the term count for the projected term.

Students in academic programs using progression by term may not always enroll in courses. Because terms in which the student does not enroll in courses are built with projected data, you need to understand the *No Data* value for the Source field on the FA Term Build Statistics page, which affects past projected terms. To ensure that students in this situation are progressing correctly, you may need to go back and build past aid years to show the student's actual progression.

Career Primacy

In determining the career value, in the case where the student has multiple valid careers, career primacy is enforced based on the term source. For example, the evaluation of career primacy is sensitive to the term source. Based on the term source of the FA Term record, the system evaluates only careers at that source level and applies primacy rules when more than one career exists. FA Term ranks term source in the following priority order:

1. 1st Term (student has enrollment data for the term).

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2. 2nd Program (student is active for an academic program).
3. 3rd Admissions (student has an active admissions application).

When the FA Term build process runs and determines the source of the term in process, the system can only assign careers at that level to the term.

This table is an example of career and primacy.

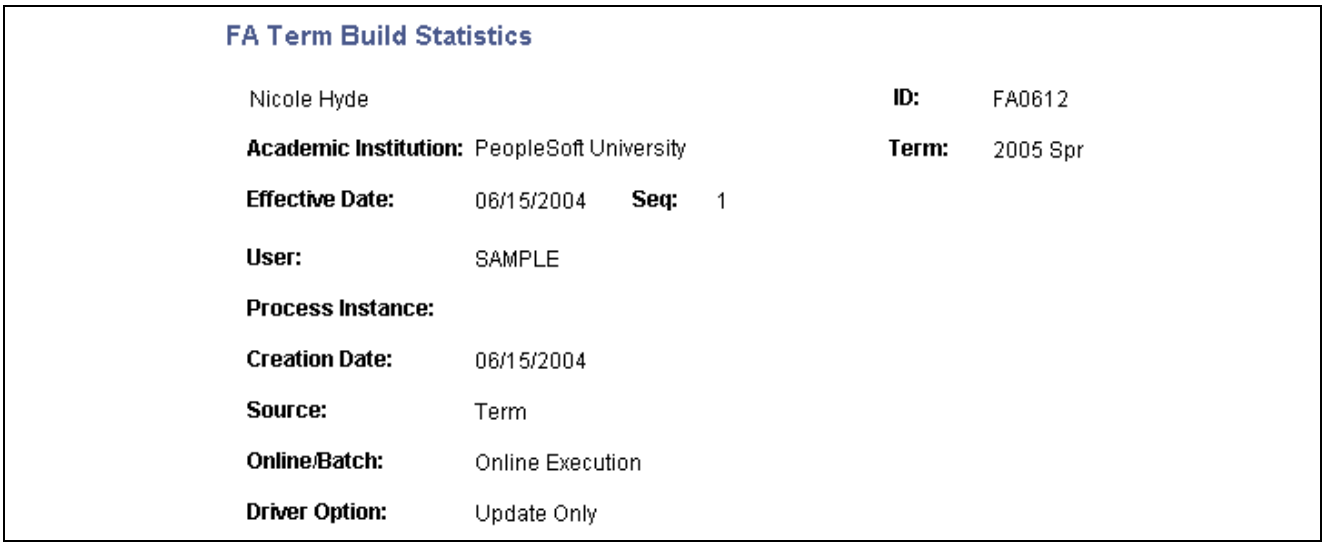
Career	Primacy
UGRD	1
UENG	4

This table is an example of career primacy based on the term source.

Example/Condition	FA Term Career Used (Term Source)
Student admitted in UGRD. Student also admitted in UENG.	UGRD (Admission) *Primacy was applied at the admission level.*
Student matriculated for UENG. Student admitted, but not matriculated for UGRD.	UENG (Program) *Primacy was not applied because there was only one career at the program level.*
Student matriculated for UENG. Student also matriculated for UGRD.	UGRD (Program) *Primacy was applied at the program level.*
Student enrolled for UENG. Student matriculated, but not enrolled for UGRD.	UENG (Term) *Primacy was not applied because there was only one career at the term level.*

Viewing Term Build Details

Access the FA Term Build Statistics page (click the Build Info link on the FA Term page).



FA Term Build Statistics page

Source Displays the source of the build.

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Admissions: The student is not in the Student Records system but has either applied for admission or has been accepted for admission. In either case, the student is not yet matriculated and terms are built in projection.

Manual: Data for the financial aid term was entered manually, and is not based on data from Student Records or Recruiting and Admissions.

No Data: The term contained old projections data, and all statistical values for that term are set to zero to prevent old projected data from counting in the cumulative values for a given student.

For example, you might receive this source value for terms in a current aid year that are still projected when you build projected terms for the next aid year. Another example is when a term built with a source value of *Program* for an aid year that has passed that is rebuilt when you build terms for the subsequent aid year in projections.

If you want to maintain past projected term data, you have to go into the past aid year and rebuild the aid year in projections. When you process past aid years, current and future aid years are not set to *No Data.*

Program: The student exists in the Student Records system but has not enrolled in courses for that term. The student can either have a program defined without being term activated or the student has a program defined and could be term activated but not yet enrolled. The financial aid term is built in projection.

Term: The statistics are from enrollment data. The student has enrolled or changes to enrollment have occurred, including a drop of all courses for the term.

Online/Batch

Indicates whether the build was performed manually, online, or in batch. Values are *Batch* and *Online Execution.* If the field is blank, the build was performed manually.

Driver Option

Populated for students whose financial aid terms are built in batch or online. Identifies whether the FA Term driver record used to run the background process builds:

- Only those terms that have enrollment data or changes to enrollment data *(Updates Only).*
- Terms using projected data as well as enrollment data *(Updates and Projections).*

For an online build process to have a driver option of *Updates and Projections,* you must select the Projections check box on the FA Term page.

Overriding Census Date Locking

Access the FA Term Census Date Locking page (click the Census Date link on the FA Term page).

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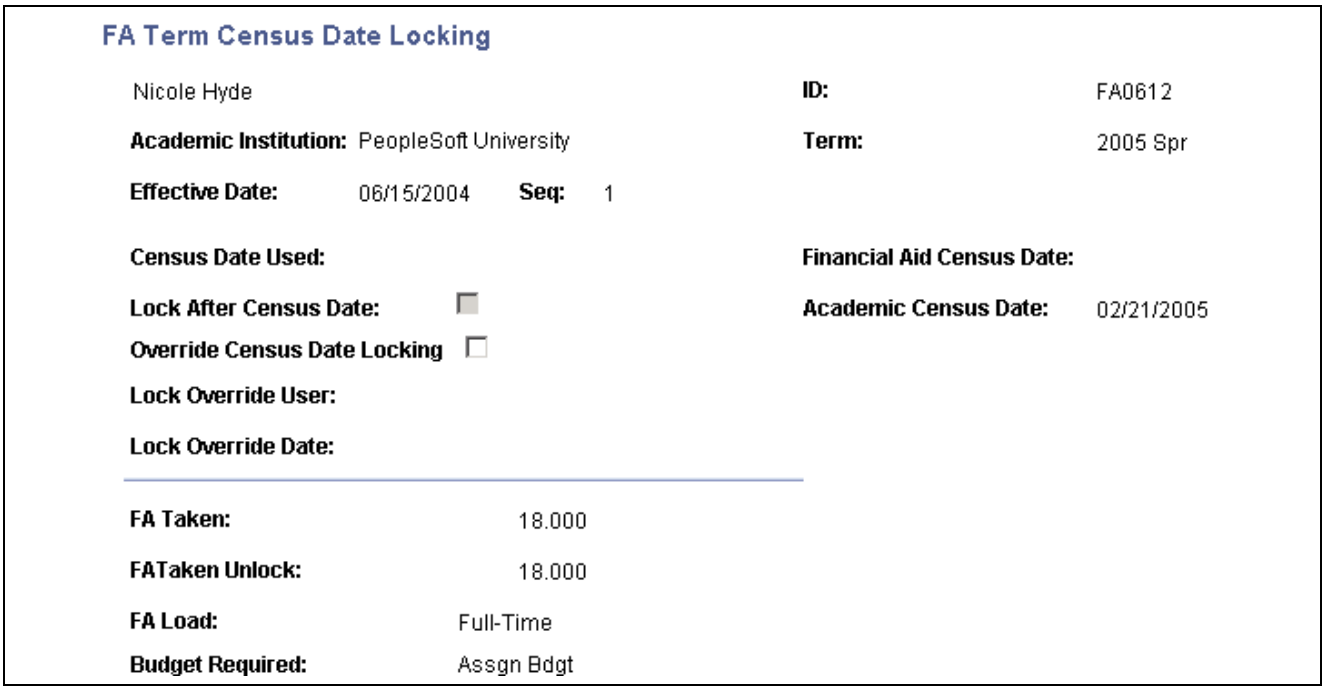

FA Term Census Date Locking page

Census Date Used

Displays the census date used to determine when the FA Load, FA Taken, and Budget Required fields are locked. The date displayed indicates which census date takes precedence if the term has an academic census date and a financial aid census date. When both census dates exist, the financial aid census date always takes precedence.

Financial Aid Census Date

Displays the financial aid census date defined by your institution for each term on the FA Term Setup page. After the financial aid census date for a term has passed, that term can no longer be built as a projection and any existing projections for that term are rebuilt and the new effective-dated row has a status of inactive. (Remember that a new effective-dated row is inserted if a change occurs in one of the audited fields when you rebuild the financial aid term.) The source for the new effective-dated row is *No Data* all term statistics are set to zero, and the Budget Required field is changed to *No Assign.* If the student has a budget, you may need to reevaluate the student's budget. If the student has financial aid awards, you may need to cancel these awards because the student is not enrolled.

If the student's terms have been built with enrollment data (not in projection), on and after this date, the FA Load, FA Taken, and Budget Required fields are locked. If an academic census date and a financial aid census date exist, the financial aid census date is used to determine the locking of these fields and is displayed in Census Date Used field.

Important! If you want to use the academic census date to lock the FA Taken, FA Loan, and Budget Required fields, then you must delete the financial aid census date on the FA Term Setup page. Remember that this affects all students for the term in the given career.

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Lock After Census Date Indicates whether the Lock check box is selected on the FA Term Setup page. If selected, the FA Taken and FA Load field values are locked with the data as of the census date, and the Budget Required field is set to *No Assign.*

Academic Census Date Displays the census date defined by your institution for each session in a term in Student Records. If a term has multiple sessions, you can define a default session for the term in Student Records. If a default session exists, the academic census date is the census date of the default session. If no default session exists, the system uses the census date of the regular academic session as the academic census date.

On and after the academic census date, the FA Load and FA Taken fields are locked and the Budget Required field is changed to *No Assign.* If an academic census date and a financial aid census date exist, the financial aid census date is used to determine the locking of these fields and is displayed in Census Date Used field.

Override Census Date Locking Select to override the census date locked fields for the term for this student. To use a census date override, the current date must be after the date in Census Date Used. Using an override enables you to update the FA Taken, FA Load, and Budget Required fields when you rebuild the FA Term. After selecting this check box you must close the page and click Save. Then click the Build button to rebuild the FA Term for the student online.

You can override the census date lock only for an individual student, not as a background process. After you have selected this check box and saved the page, you cannot clear it.

Lock Override User Indicates the user ID of the person who selected the Override Census Date Locking check box. This field is only populated if the census date has passed and the Override Census Date Locking check box is selected.

Lock Override Date Displays a date/time stamp inserted by the system when the Override Census Date Locking check box is selected. This field is only populated if the census date has passed and the Override Census Date Locking check box is selected.

FA Taken Displays the student's financial aid units taken as of the census date. If the Lock After Census Date check box is selected, this field displays the locked value.

FA Taken Unlock Displays the value for the actual financial aid units after the census date. You must rebuild the FA Term to have the most current units displayed in this field. This allows you to see the effect on the financial aid units taken if you select the Override Census Date Locking check box.

FA Load Displays the student's financial aid load as of the census date.

Budget Required Displays the value of the Budget Required field on the Financial Aid Info page in this component. The student's value determines his or her stage in the budget build process. If you use census date locking, after the census date passes the value in this field, it becomes *No Assign.*

Viewing Academic Advisor Information

Access the FA Term Academic Advisor Information page (click the Advisor link on the FA Term page).

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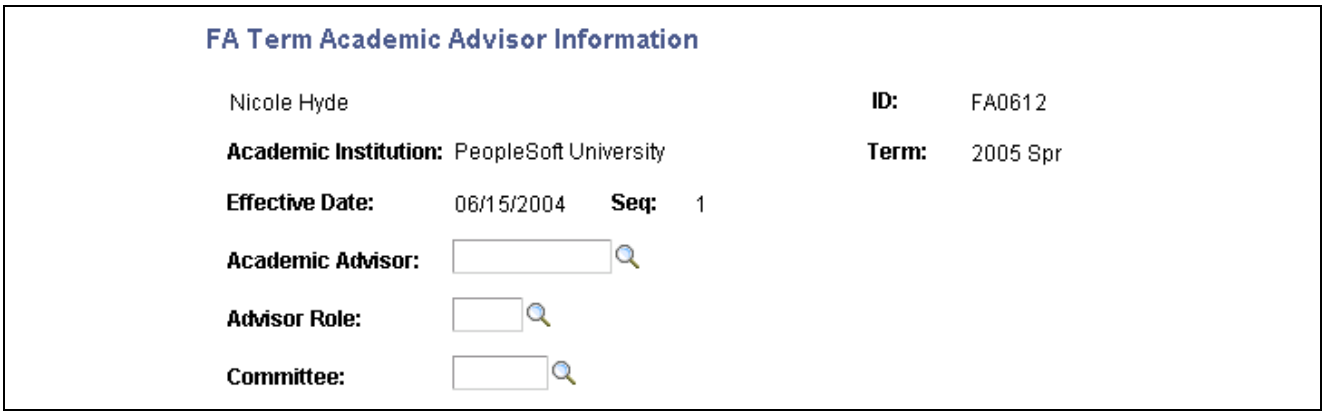


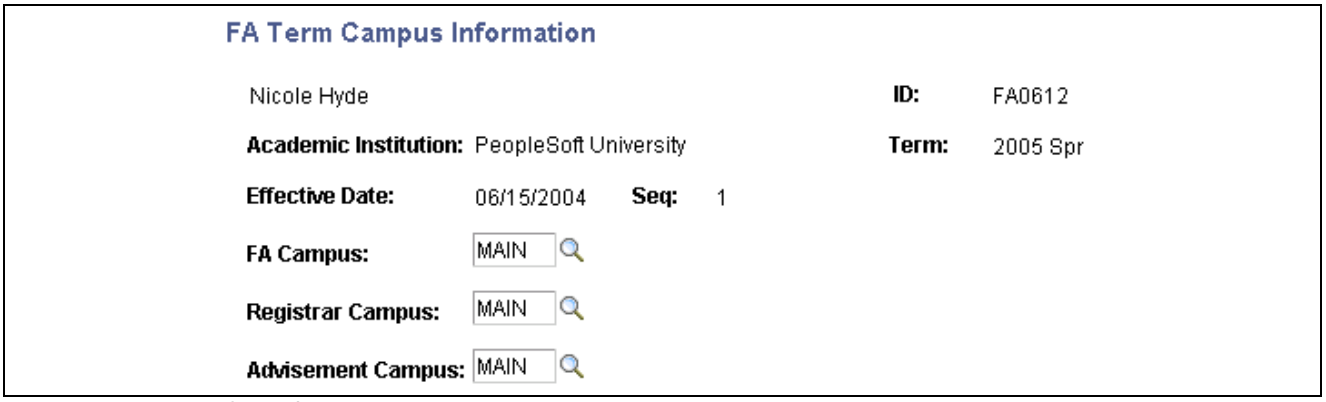
FA Term Academic Advisor Information page

Note. This page displays data from PS_STDNT_ADVR_HIST. This data is maintained and entered on the Student Advisor page (Manage Student Records, Track Student Careers, Use, Student Advisor).

Academic Advisor	Displays the ID of the academic advisor assigned to this student.
Advisor Role	Displays the role of this student advisor.
Committee	Displays the committee on which this advisor serves.

Viewing Campus Information

Access the FA Term Campus Information page (click the Campus Info link on the FA Term page).



FA Term Campus Information page

FA Campus (financial aid campus)	Enter the physical location where the student receives financial aid services.
Registrar Campus	Enter the physical location of the registrar responsible for the student.
Advisement Campus	Enter the physical location where the student goes for advising services.

Viewing Academic Level and Load Information

Access the Acad Level page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Acad Level).

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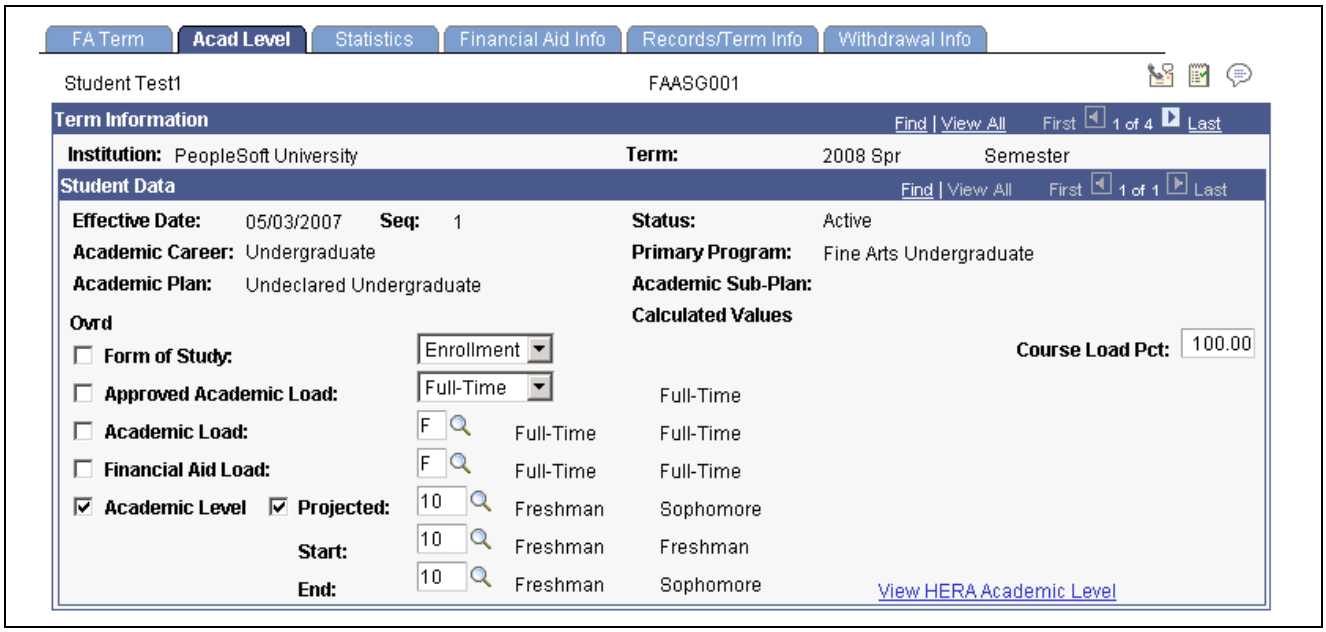

Acad Level page

You can override the values in the Form of Study, Approved Academic Load,Academic Load,Financial Aid Load,Academic Level - Projected,Academic Level - Start, and Academic Level - End fields by selecting a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the Override Expiration Date field on the FA Term page.

Form of Study

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system populates this field by default with the Student Records value. Values include: *Detached, Enrollment, Abroad,* and *Candidacy.*

Approved Academic Load

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system populates this field by default with the load value that exists for the primary academic career. Values are *Full-Time* and *Part-Time.*

Academic Load

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The number of units the student is enrolled in determines the student's academic load. The number of units, which is the sum of the Academic Progress Units value (from the Catalog Data page) for each class the student is enrolled in, is compared against the level/load rules to determine the appropriate academic load. For this calculation, the system uses the number of units defined for the student's courses according to Student Records. The same courses may count for a different number of financial aid eligible units. Values are: *Full-Time, Half-Time, Less 1/2, No Units, Part-Time,* and *3/4 Time.*

Financial Aid Load

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system normally derives the value by comparing the calculated unit cumulative with the unit conversion. The system compares the number of units, which is the sum of the Financial Aid Progress Units value (from the Catalog Data page) for each class the student is enrolled in, against the level/load rules to determine the appropriate

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load value. For this calculation, the system uses the number of financial aid eligible units defined for the student's courses according to Student Records. The same courses may count for a different number of academic units. Values are: *Full-Time, Half-Time, Less 1/2, No Units,* and *Three Qtrs.*

Note. The values in the three academic level fields are based on level/load rules associated with the student's primary academic program. Only those academic levels that are associated with the student's primary academic program academic level rule are available. Academic level values are shipped with the system as translate values. These translate values can be modified.

Academic Level - Projected To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. This field displays the projected academic level for the student at the end of the term, based on Student Records data. The projected level is based on the student completing all courses in prior terms, plus the enrollment for the current term. For example, the student has passed thirty units in previous terms and is currently enrolled in twelve units. The system uses the sum of these units, forty-two, to determine the student's academic level using level/load rules.

Academic Level - Start To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. This value represents the total number of units the student has passed in all previous terms. The system uses the sum to determine the academic level using load/level rules.

Academic Level - End To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The student's academic level at the end of the term equals the cumulative passed units from previous terms, plus the number of units passed for the current term. The system uses the sum to determine the academic level using load/level rules. The Projected Academic Level always matches the End Academic Level when term progression is used in the Level/Load rule applied to the student.

Course Load Pct (course load percentage) The course load percentage provides an alternative way to define full-time and less than full-time students based on percentages. The value in this field is derived from level/load rules. When you invoke the FA Term process, the system calculates the course load percentage for each student.

View HERA Academic Level Click the View HERA Academic Level link to access the HERA Academic Level page. This link displays only when the HERA academic level setup has been provided.

See Also

lssr, Preparing for the Course Catalog and Schedule of Classes, Setting Up Catalog and Schedule Options

Viewing HERA Academic Levels

Access the HERA Academic Level page (click the View HERA Academic Level link on the Acad Level page).

Note. Documentation about the HERA Academic Level page is located in the Processing ACG and SMART Grants chapter.

See [Processing ACG and SMART Grants]Maintaining HERA Academic Level Values.

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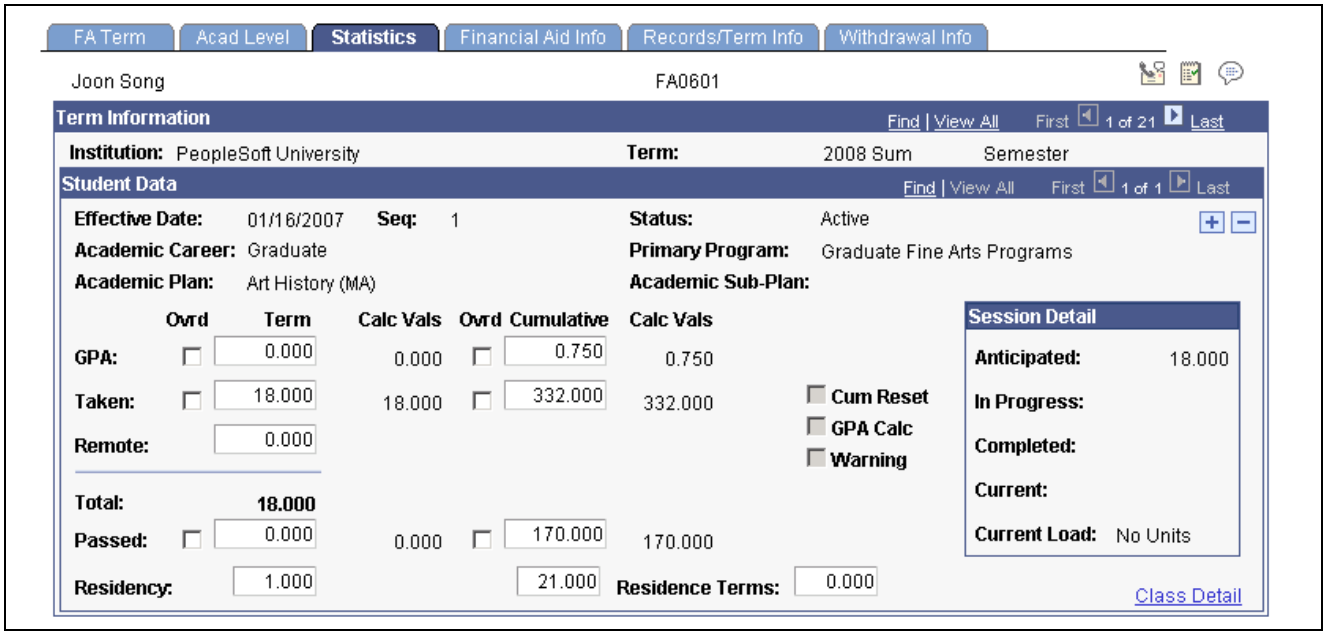
Viewing Academic Statistics

Access the Statistics page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Statistics).



Statistics page

If students have not applied for financial aid in contiguous aid years but have been enrolled in terms in which they did not apply for aid, the system recalculates cumulative statistics (GPA, UNITS TAKEN, UNITS PASSED) from their enrollment data for the first term of the noncontiguous aid year. The system recognizes students as financial aid applicants for an aid year if they are aid year activated. This resolves inaccuracies in the cumulative statistics when students may be continuously enrolled at the school but have not applied for financial aid for all aid years. If no enrollment information exists for the students in terms in which they have not applied for aid, the cumulative statistics calculation remains unchanged.

Student Data

You can override the values in the GPA - Term, GPA - Cumulative,Taken - Term, Taken - Cumulative, Passed - Term, and Passed - Cumulative fields by entering a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the Override Expiration Date field on the FA Term page.

GPA - Term Displays the student's grade point average (GPA) for the term you are viewing. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.

GPA - Cumulative Displays the student's cumulative GPA, including this term. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.

Taken - Term Displays the number of units taken this term. The value of this field determines the FA Load on the FA Term Census Date Locking page. The Tuition Calculation routine also uses this number of units during the Student Budget Assignment process. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.

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Taken - Cumulative	Displays the total units a student has taken, including this term. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Remote	Displays units a student is taking concurrently at another institution that are part of a student's unit load for the term. This situation can occur if you have a multi-institution system, and the student takes courses at another institution within the system. Remote units indicate that a student is enrolled at two different campuses.
Total	Displays the total number of units (Taken - Term units plus Remote units) the student is taking this term.
Passed - Term	Indicates the number of units the student completed with a passing grade for the term. The system uses this value to determine the student's projected, start, and end academic levels (displayed on the Acad Level page). The system also uses this value to update the NSLDS loan year. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Passed - Cumulative	Indicates the cumulative units the student has completed with a passing grade, including units passed this term. This value is used in determining the student's projected, start, and end academic levels (displayed on the Acad Level page). The system also uses this value to update the NSLDS loan year. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Residency - Term	Indicates the number of units a student has completed in residency at your institution this term.
Residency - Cumulative	Indicates the total number of units a student has completed in residency at your institution.
Cum Reset (cumulative reset)	If selected, Student Records has reset all the student's cumulative fields to zero for this term. This is usually done to handle academic forgiveness, transfer credits, or consecutive academic careers. This field is informational only and has no effect on Student Records or Financial Aid. However, you may want to contact the student records administrators to determine why the student's cumulative fields have been reset.
GPA Calc (grade point average calculation)	Automatically selected if the FA term build process failed to calculate a GPA for the student. This can happen when a student is enrolled in multiple careers that do not have the same grading scheme—such as concurrent enrollment in undergraduate and graduate careers in a given term. This field is for informational purposes only. However, you may want to determine why the build process was unable to calculate a GPA for the student. ***Warning!*** The system selects this check box if either the Cum Reset or GPA Calc check box is selected. This field serves as a flag that your institution can track.
Transfer Credit	The system displays this link only when you have entered transfer credits for the student. Click to access the FA Term Transfer Credits page and view information about the number of transfer credits that a student has.

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Other Units The system displays this link only when the student has more than one academic career associated with more than one financial aid career type. Click to access the FA Term Other Units page and view term statistics for a student's other academic career.

Class Detail Click to access the FA Term Class Detail page and view a detailed picture of the student's enrollment.

Session Detail

Track a student's progress using units during the session and term. These fields do not affect the calculation of GPA and NSLDS loan year directly, but are accounted for in Taken - Term, Taken - Cumulative, Passed - Term, and Passed - Cumulative fields.

Anticipated Displays the number of units the student is enrolled in for classes whose start date is after the effective date.

In Progress Displays the number of units for classes the student is enrolled in and the effective date is between the class start date and end date.

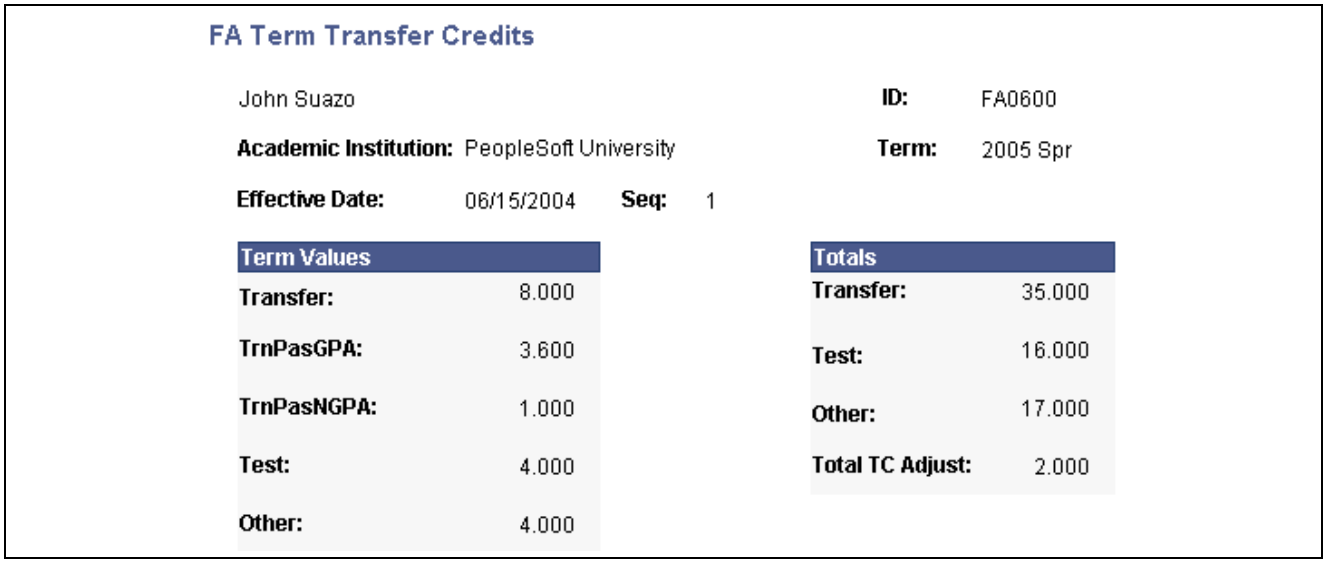
Completed Displays the number of units the student has completed as of the effective date. This field does not track passed courses; it counts the units of all classes whose end dates are earlier than the effective date.

Current Displays the total number of units the student has completed and is currently enrolled in for the term (sum of in progress and completed units). This allows you to track the total number of units taken for the term regardless of the number of sessions taken.

Current Load Displays the student's academic load for the term, based on the number of units in the Current field.

Viewing Transfer Credit Information

Access the FA Term Transfer Credits page (click the Transfer Credit link on the Statistics page).



FA Term Transfer Credits page

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Term Values

Transfer	Displays the number of units the student received transfer credit for this term.
TrnPasGPA (transfer passed for GPA)	Displays the number of passed transfer credit units that count towards the student's GPA for this term.
TrnPasNGPA (transfer passed not for GPA)	Displays the number of passed transfer credit units that do not count towards the student's GPA for this term.
Test	Displays the number of units the student has earned by taking tests such as the SAT II or Advanced Placement tests for this term.
Other	Displays the number of units the student has earned from other sources, such as credits for work experience or credits from the ROTC program for this term.

Totals

Transfer	Displays the total number of units from transfer credit the student has.
Test	Displays the total number of units the student has earned by taking tests such as the SAT II or Advanced Placement tests.
Other	Displays the total number of units the student has earned from other sources, such as credits for work experience or credits from the ROTC program.
Total TC Adjust (total transfer credit adjustment)	Displays the total number of units that the student has earned but does not receive credit for in the system. For example, if your institution has a limit of 100 transfer units, and the student has earned 120 transfer units, this field displays *20* for the 20 units the student does not receive credit for in the system.

Transfer Credit and Financial Aid Term Build

A transfer student's NSLDS loan year, academic level information, GPA, and cumulative units (taken and passed) on the student's financial aid term record depend on the data source and whether the student's transfer credits have been posted in Student Records.

If a transfer student's financial aid term is built with a source of *Admissions,* then the student's academic level information and NSLDS loan year are based on the year (level) at which the student is admitted. The information on the Statistics page, however, reflects only the projected term enrollment information. Only the units that the student is projected to enroll in for the term are used to determine the student's units taken for the term and cumulative units taken.

If the source is *Program* or *Term,* then the student's financial aid term information depends on whether the student's transfer credits have been posted in Student Records. If the student's transfer credits have been posted, then the student's academic level information is determined using the number of transfer units the student has and your institution's level/load rules. The student's NSLDS loan year, in turn, is based on the student's calculated academic level. The cumulative values on the Statistics page include the transfer credits. In other words, the build process derives the student's financial aid term data using the transfer credit as if it were units taken in the past at your institution.

In contrast, if the source is *Program* or *Term* and transfer credit has not been posted, the student's NSLDS loan year, academic level information, GPA, and cumulative units (taken and passed) on the student's financial aid term record do not reflect the transfer credits. Consequently, the student is built as a freshman for the starting academic level and NSLDS loan year (because the NSLDS loan year is calculated from the academic level). The values on the Statistics page include information for the current term only.

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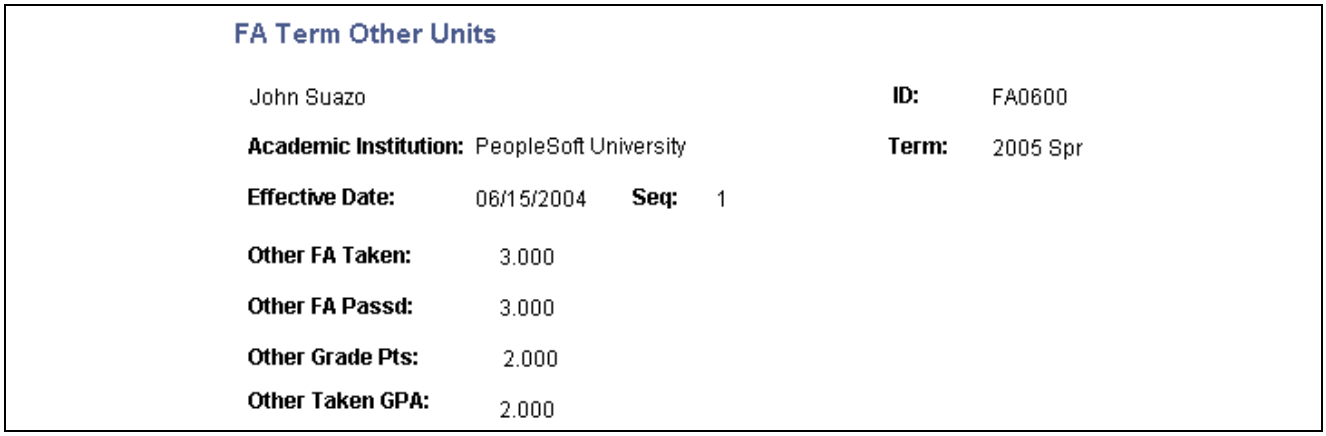
See Also

lssr, Processing Transfer Credit

Viewing Term Statistics for a Student's Other Career

Access the FA Term Other Units page (click the Other Units link on the Statistics page).



FA Term Other Units page

Students have another academic career when they have more than one academic career associated with more than one financial aid career type. The term statistics for the academic career with the lower primacy number (or higher priority) is displayed on the Statistics page. The term statistics for the career with the higher primacy number (or lower priority) appears on this page. You can use this information to adjust a student's award package manually based on these units taken.

Note. The data on the FA Term Other Units page does not carry forward to other terms unless multiple financial aid career types for other terms exist

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Other FA Taken and **Other FA Passd** (other FA passed)	Displays units taken and units passed for the other academic career for the term.
Other Grade Pts (other grade points)	Displays grade points for the other academic career for the term.
Other Taken GPA	Displays the units considered toward the GPA for the other academic career for the term.

Viewing a List of the Student's Classes

Access the FA Term Class Detail page (click the Class Detail link on the Statistics page).

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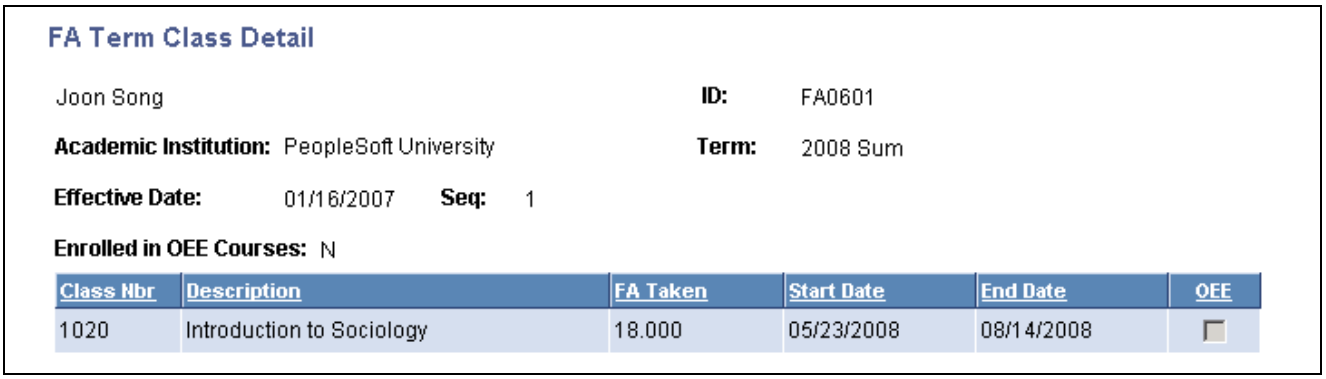

FA Term Class Detail page

Note. The data appearing on this page changes depending on the effective-dated row and enrollment changes from Student Records.

Enrolled in OEE Courses (enrolled in open entry/exit courses)	Indicates whether the student is enrolled in one or more Open Entry/Open Exit sessions.
Class Nbr (class number)	Displays the class's unique identifier, assigned in Student Records.
FA Taken	Displays the number of financial aid eligible units the class is worth.
Start Date and **End Date**	Displays the start and end dates for the class.
OEE (open entry/exit)	Indicates whether the class is an Open Entry/Open Exit session. This information comes from Student Records and determines the value of the Enrolled in OEE Courses field.

Viewing Loan, Graduation, and Budget Information

Access the Financial Aid Info page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Financial Aid Info).

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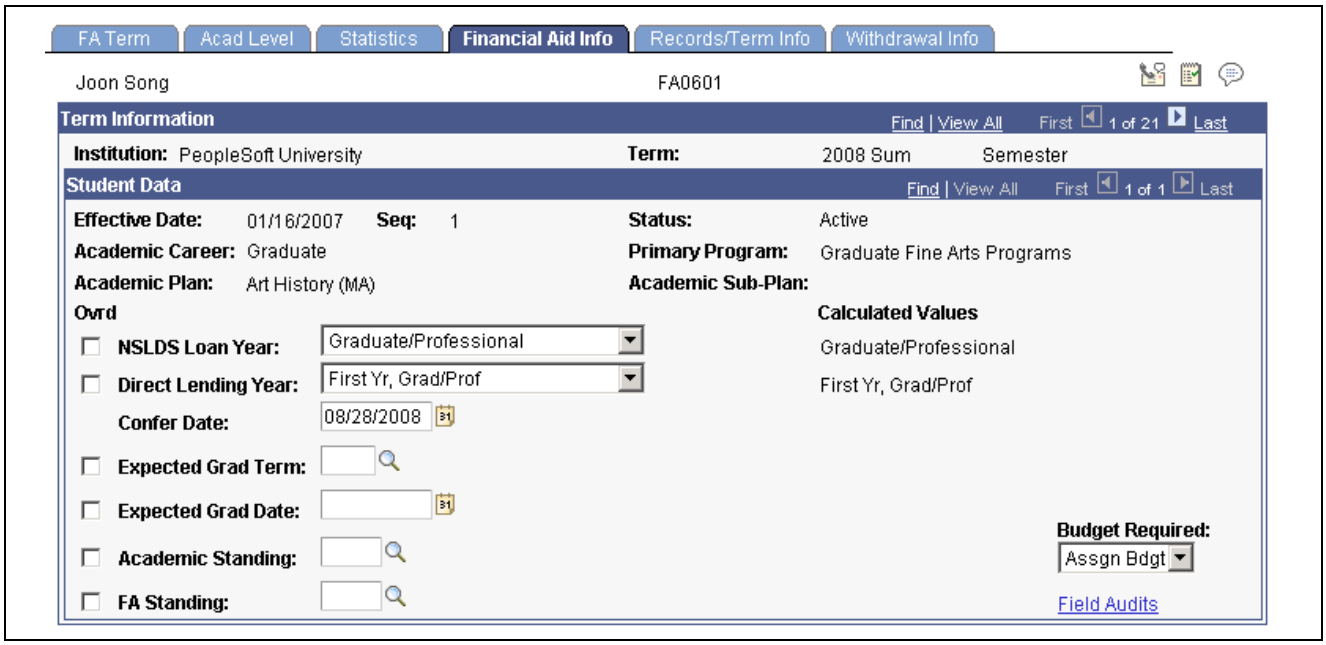

Financial Aid Info page

You can override the values in the NSLDS Loan Year, Direct Lending Year, Expected Grad Term, Expected Grad Date, Academic Standing, and FA Standing fields by entering a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you need only to override the fields until a certain date within the term, use the Override Expiration Date field on the FA Term page.

NSLDS Loan Year

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system calculates the student's NSLDS loan year by comparing the student's cumulative units passed against the Academic Level table. It uses this value in awarding to determine level limit rules attached to a specific financial aid item type. The system also uses this field in the Loan Process routine to determine the student's loan level aggregate. The NSLDS loan year selections are translate values based on the financial aid level. Values include: *1st Year - Never Attended, 1st Year - Previously Attended, 1st Year Graduate, 2nd Year, 2nd Year Graduate, 3rd Year, 3rd Year Graduate, 4th Year, 4th or more Graduate, 5th Year+* and *Graduate/Professional.*

Direct Lending Year

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system determines the direct lending year the same way it determines the NSLDS loan year. When the system creates direct lending origination files, it populates the Student's College Grade Level with the information from this field. Correct the value in this field as required by direct lending reporting requirements. Values include: *Fifth Year+ Undergrad* (fifth year plus undergraduate), *First Year, never attended, First Year, previously attnd* (first year, previously attended), *First Yr, Grad/Prof* (first year graduate/professional), *Fourth Year, Fourth Yr+, Grad/Prof* (fourth year plus, graduate professional), *Third Year* or *Third Yr, Grad/Prof.*

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Confer Date

Enter or view the confer date of the student's degree if the student graduates in the displayed term. This date corresponds with the term end date found on the Term Table.

Expected Grad Term
(expected graduation term)

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system uses this value for loan processing. If available, the system uses the Student Records value or the PeopleSoft Recruiting and Admissions value.

When you build terms in projection, the build process does not build terms after the expected term of graduation, unless the student is going into another career after graduation.

The student's expected graduation term is a loan validation field edit. This means that if the expected graduation date has passed, the Loan Validation routine prevents loan origination. If a value exists for this field, it automatically appears when you create the student's loan origination application. The field can be updated online in the loan origination pages when processing the student's loan application.

Expected Grad Date
(expected graduation date)

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. Enter or view the date the student is expected to graduate. The system uses the expected graduation date for loan processing. If available, the system uses the Student Records value. The loan origination process projects a graduation date if the field is blank.

The Loan Validation Field Edit routine checks for this value. If a value exists for this field, it automatically appears in the Program Completion Dt (program completion date) field on the Loan Origination 2 page when you create the student's loan origination application. You can update the field online in the loan origination pages when processing the student's loan application.

In CommonLine loan processing, it is important for the expected grad date not to occur before the end of the student's loan period. The loan is rejected by the loan servicer as a result. A loan validation edit is provided to identify invalid graduation dates.

Note. It is important that the academic departments, the financial aid office, other administrative departments, and the student agree on the student's graduation term and date. Errors in these dates can have serious consequences for a student's loan eligibility and repayment periods.

Academic Standing

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. This value is based on meeting your institution's academic progress guidelines. You can create these values on the Academic Standing Table page in Student Records and set them up as action codes. You can created values for dismissed, good standing, probation, or warning statuses, and you can create multiple codes for the same status. For example, a student could receive two warnings (WRN2) before being placed on probation.

The financial aid term build process populates this field only if academic standing data exists for the student in Student Records.

This field is not used for financial aid processing, but you can use it in formulas or equations to select students.

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FA Standing (financial aid standing)

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. You create and maintain action codes on the Academic Standing Table page in Student Records. Your financial aid office can assign a code for the selected term to establish a student's financial aid status for a locally defined business process. This field is set manually and is not used by delivered financial aid processes.

Budget Required

Indicates whether a student has an assigned budget or needs a budget posted. The value in this field determines whether the student is evaluated during the Budget Assignment process. Values include:

Assgn Bdgt (assign budget): The student should be selected during the Budget Assignment process. Whenever you build or rebuild a term, the field is automatically updated with this value.

In Prgres (in progress): The assignment of a budget is currently in progress for this student. The field is automatically updated to this value when a student has been selected for the budget assignment process.

Error: An error occurred during the Budget Assignment process.

No Assign: The system does not select the student during the Budget Assignment process. The field is automatically updated to this value when the student's budget is posted by the Student Budget Assign − Move (FAPBDGTM) process. The census date locking functionality also causes this value to be assigned after the census date has passed and the lock has been invoked.

Field Audits

Click to access the FA Term Field Audits page and monitor changes in a student's financial aid term information from the previous effective-dated row.

You must select the Audit FA Term Build check box on the Financial Aid Defaults page to view changes to the student's financial aid term on the FA Term Field Audits page. If you do not select this check box, the system does not record changes in the student's record to the audit table; a new effective-dated row is still built every time that a change occurs in one of the audited fields.

See Also

lssr, Tracking Student Data, Tracking Academic Standing

Viewing Changes in a Student's FA Term Information

Access the FA Term Field Audits page (click the Field Audits link on the Financial Aid Info page).

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FA Term Field Audits

Lamii Vigor **ID:** FA0711

Academic Institution: PeopleSoft University **Term:** 2005 Spr

Effective Date: 09/21/2004 **Seq:** 1

Field Name	Old Value	New Value	User ID	Online/Batch	Process Instance
ACADEMIC_LOAD	F	T	PS	Online	
ADMIT_TERM	0360		PS	Online	
CAMPUS	MAIN	WALCR	PS	Online	
COURSE_LD_PCT	00000100	00000075	PS	Online	
CUM_RESIDENT_TERMS	00000007	00000009	PS	Online	
FA_LOAD	F	T	PS	Online	
FA_UNIT_ANTIC	00000016	00000011	PS	Online	
TOT_PASSD_FA	00000000	00000024	PS	Online	
TOT_TAKEN_FA	00000096	00000115	PS	Online	
UNT_TAKEN_FA	00000016	00000011	PS	Online	

FA Term Field Audits page

Monitor changes made by the FA Term Build background process or by the FA Term Online Build process. The Online Build process is performed when you click the Build button on the FA Term page.

If a change occurs in one of the following fields, the FA Term Build background process or the FA Term Online Build process creates a new effective-dated row and enters the old and new value on the FA Term Field Audits page. You can create your own reports using the audit data provided on the page. The audited fields are:

Audit Fields		
ACAD_CAREER	CUR_RESIDENT_TERMS	SFA_ASG_WI_CUM_BOT
ACAD_LEVEL_BOT	EXP_GRAD_TERM	SFA_ASG_WI_CUM_EOT
ACAD_LEVEL_EOT	FA_LOAD	SFA_ASG_UNITS_BOT
ACAD_LEVEL_PROJ	FA_LOAD_CURRENT	SFA_ASG_UNITS_EOT
ACAD_PLAN	FA_NUMBER_OF_WEEKS	SFA_ASG_WI_TCR
ACAD_PLAN_TYPE	FA_REBUILD_DT	SFA_ASG_WI_TRM
ACAD_PROG_PRIMARY	FA_UNIT_ANTIC	STUDY _AGREMENT
ACAD_SUB_PLAN	FA_UNIT_COMPLETED	TERM_SRC
ACADEMIC_LOAD	FA_UNIT_CURRENT	TOT_PASSD_FA
ADMIT_TERM	FA_UNIT_IN_PROG	TOT_TAKEN_FA
CAMPUS	FORM_OF_STUDY	UNT_PASSD_FA
COURSE_LD_PCT	LS_GPA	UNT_TAKEN_FA

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Audit Fields		
CUM_GPA	SFA_ASG_AC_LVL_BOT	WEEKS_OF_INSTRUCT
CUM_RESIDENT_TERMS	SFA_ASG_AC_LVL_EOT	WITHDRAW_CODE

Field Name Displays the name of the field with the changed value.

Old Value Displays the value of the field before the change, listed on the previous effective-dated row.

New Value Displays the value of the field after the change, listed on the current effective-dated row.

User ID Displays the ID of the user who processed the change.

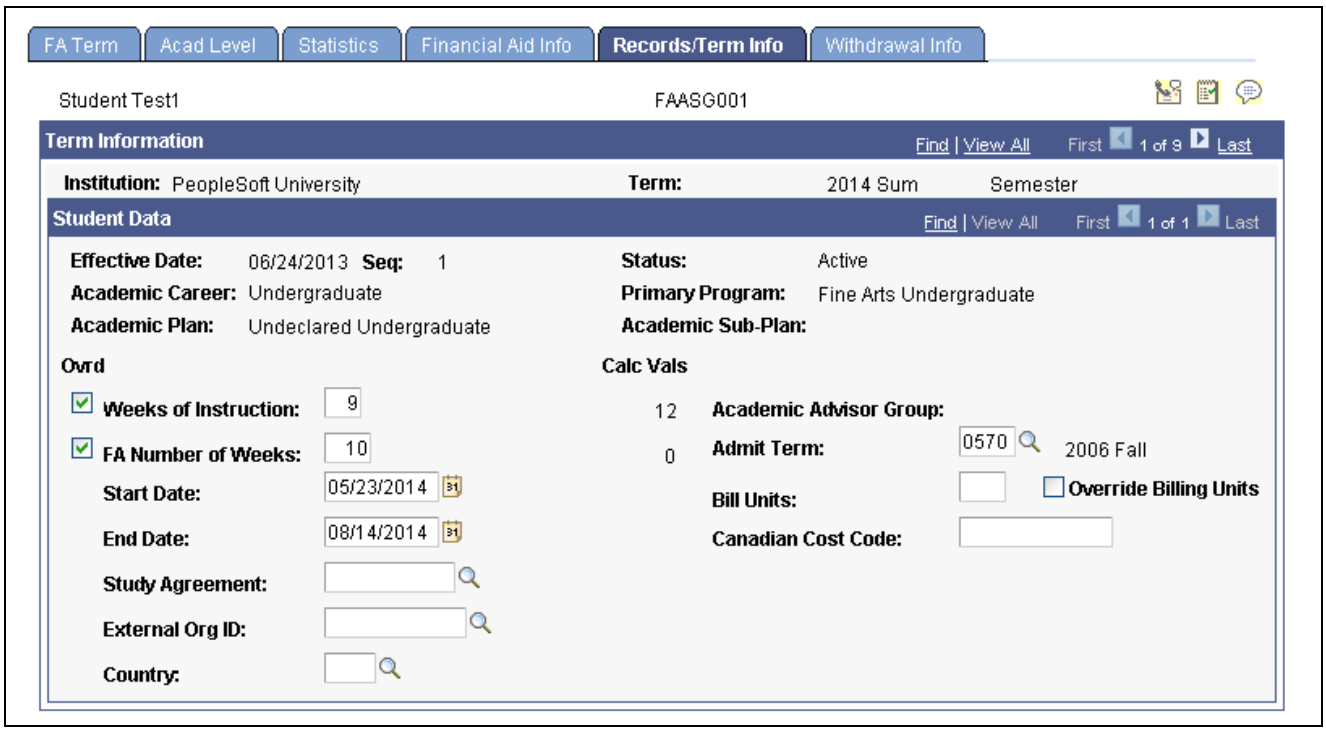
Online/Batch Indicates whether the change was made in batch or online.

Process Instance Displays the process instance for the background process that changed the field. If the change was made online, this field is blank.

Viewing Student Records Term Information

Bundle 30
Added Override capability for the "Weeks of Instruction" and "FA Number of Weeks" fields.

Access the Records/Term Info page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Records/Term Info).



Records/Term Info page

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This page is intended for collecting study abroad or institutional visit information from Student Records and entering Canadian cost code information. Information on this page can be changed for financial aid purposes without any effect on Student Records data in your system.

Bundle 30 **Rewrote field description.**

Weeks of Instruction

Displays a calculated value built when the term is built with a source of Term. The build process adds the number of weeks of the different session start and end dates for all classes the student is enrolled (taking into consideration any overlap in enrollment). For Open Entry/Open Exit courses, where the start and end dates for the student's classes are expected to be different, the start and end dates of these courses are used in place of the session dates.

If the term is built with projected data, then the build process populates this field with data from the FA Term Setup page. If multiple sessions exist for a term, the build process looks for a default session. If a default session is defined, the build process uses the weeks of instruction from the default session. If no default session exists, the build process uses the weeks of instruction from the regular academic session.

If the Weeks of Instruction field is modified, the Ovrd (override) check box is automatically populated. The calculated value continues to be displayed under Calc Vals.

Note. If the Override Expiration Date functionality is enforced for the term, the Weeks of Instruction is reset with the calculated value past that date.

Note. If the Term Source is set to *No Data*, the override is cleared and the Weeks of Instruction is reset to zero.

Bundle 30 **Rewrote field description.**

FA Number of Weeks

Displays the value from the Cost Code Setup that is used for Canadian loans.

If the FA Number of Weeks field is modified, the Ovrd (override) check box is automatically populated. The value from the Cost Code Setup continues to be displayed under Calc Vals.

Note. If the Override Expiration Date functionality is enforced for the term, the FA Number of Weeks is reset with the calculated value past that date.

Note. If the Term Source is set to *No Data*, the override is cleared and the FA Number of Weeks is reset to the calculated value.

Start Date and **End Date**

Displays the beginning date and ending date of the term. If the student is enrolled in a single session, the start date is the term start date. If the student is enrolled in multiple sessions, the start date is the earliest session start date of the classes the student is enrolled in. The end date comes from the Term Table.

Study Agreement

This value is derived from Student Records. The values in this field may include Study Abroad programs or programs sponsored by other external organizations.

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External Org ID (external organization ID)	This value is derived from Student Records. Select the appropriate ID to associate with the study agreement.
Country	This value is derived from Student Records. Select the appropriate country to associate with the study agreement and external organization.
Academic Advisor Group	This value is derived from the Academic Group field in the Academic Program Table in Student Records. It indicates the school within the institution. Examples of an academic group are College of Fine Arts, School of Medicine, or Continuing Education. The build process inserts a value into this field only if a value exists in the Academic Group field; otherwise, it leaves this field blank.
Admit Term	The term the student was admitted to the primary program. If the student has switched primary programs since he or she was admitted, then the admit term displays the term that the student switched programs.
Bill Units (billing units)	This value is derived from Student Financials. You can override the Billing process by selecting the Override Billing Units check box. You can then enter the number of billing units you want to use for the student. This field is for informational purposes only.
Override Billing Units	Select this check box to override the Billing process. After you select this check box, you can enter a new value in the Bill Units field.
Canadian Cost Code	(CAN) Used by Canadian institutions only. The FA Term process populates this value, based on the number of weeks of financial aid and the student's career, program, and year in school. You set up your institution's cost codes on the Cost Code Setup page. Canadian institutions use cost codes to report financial aid calendars, length of financial aid award periods, and cost of attendance information to the Canada Student Loan program.

Viewing Withdrawal Information

Access the Withdrawal Info page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Withdrawal Information, Withdrawal Info).

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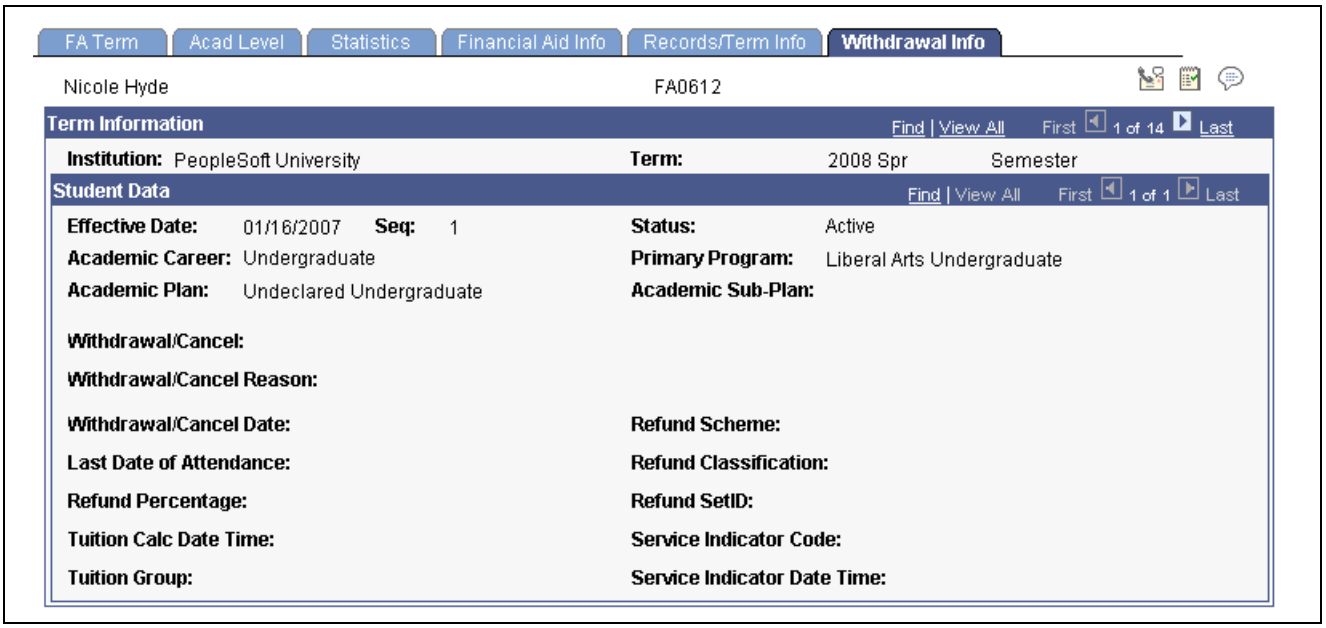

Withdrawal Info page

Student Records processes student withdrawals, collecting information about the type of withdrawal, the reason for the withdrawal, and the last date the student attended class. Student Financials uses this information to calculate whether the student should receive a refund and posts these calculations. This page displays information from Student Records and Student Financials that may affect financial aid processing, such as return of Title IV funds.

Refund Percentage Tuition calculation only posts if a student receives federal financial aid and financial aid has been posted to the student's account. This value is posted if a tuition calculation has occurred. The refund percentage is based upon the date of the student's withdrawal.

Refund Scheme Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account. The refund scheme is based upon the adjustment used.

Refund Classification Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account.

Refund SetID Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account.

Service Indicator Code Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account. Shows a service indicator set by Student Financials to state the need for financial aid to adjust the student's aid and release a hold.

Service Indicator Date Time Tuition calculation only posts if a student receives federal financial aid and financial aid has been posted to the student's account. The date and time the service indicator was set.

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Building Financial Aid Terms Manually

After you have completed the setup steps, you can choose to run the FA Term build process manually. Go to the FA Term page and click the Build button.

Building Financial Aid Terms in Batch

This section provides an overview of building financial aid terms in batch and discusses how to:

- Create FA Term driver records.
- Create financial aid terms in batch.

Understanding Building Financial Aid Terms in Batch

Running the batch financial aid term build process is a two-step process. You must:

- Create an FA Term driver record to identify the students for which to build financial aid terms. This process selects students using institution, aid year, and career as criteria and inserts the IDs of these students into a worktable.
- After students have been selected, you run the FA Term Build process (FAPTRMU1) to create financial aid terms for the students in the worktable. You must remember to enter the same institution and aid year on this page as you did for the FA Term driver record.

Pages Used to Build Financial Aid Terms in Batch

Page Name	Definition Name	Navigation	Usage
Create FA Term Driver Records	RUNCTL_FAPTRMU1SQR	Financial Aid, Financial Aid Term, Create FA Term Driver Recs, Create FA Term Driver Records	Create FA Term driver records for the batch Financial Aid Term build process.
Build FA Terms	RUNCTL_FAPTRMU1CBL	Financial Aid, Financial Aid Term, Build FA Terms in Batch, Build FA Terms	Create Financial Aid Terms in batch.

Creating FA Term Driver Records

Access the Create FA Term Driver Records page (Financial Aid, Financial Aid Term, Create FA Term Driver Recs, Create FA Term Driver Records).

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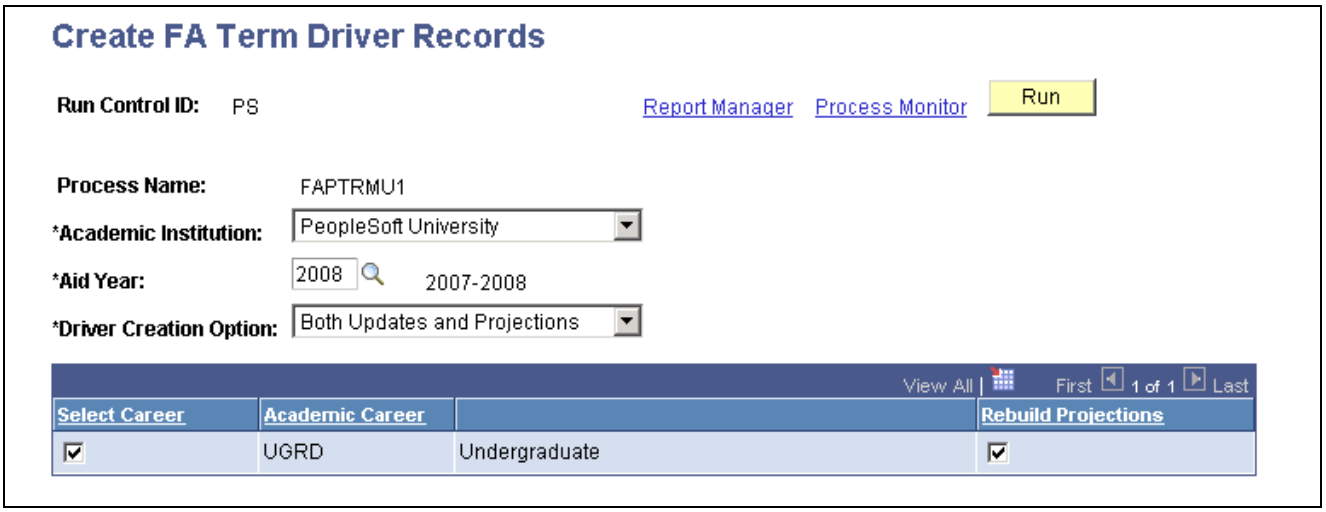

Create FA Term Driver Records page

The Process Name field displays the name of the process that creates driver records.

Driver Creation Options

Choose the type of terms you want the batch financial aid term build process to build or rebuild.

Both Updates and Projections Select if you want to build or rebuild terms the student is currently enrolled for as well as terms with projected enrollment information. This means that all terms in the aid year are built (in projection if necessary), regardless if the student has been term activated for the term.

Update Only Select if you want to build or rebuild only terms for which the student is currently enrolled. This means only those terms for which the student has enrollment data.

Other Page Elements

Academic Career After you select an academic institution and aid year, a list of careers associated with this aid year on the FA Term Setup page appears in this column. Select the check boxes next to the careers for which you want to run the batch financial aid term build process.

Rebuild Projections Select to indicate that the financial aid term build process should rebuild projected terms—as well as terms built with enrollment data—using current data. Use this check box to rebuild projections when a change occurs in career or program. You do not have to select this check box to have terms with updates rebuilt, because the build process automatically rebuilds terms with updates. You can choose whether you want to rebuild projections for each career. Even if selected, terms are not built in projection after the census date if you activate the census date lock.

Run Run the Create Drivers Recs For FA Trm (create driver records for financial aid term) process (FAPTRMU1) when you are ready to create Driver Records.

Creating Financial Aid Terms in Batch

Access the Build FA Terms page (Financial Aid, Financial Aid Term, Build FA Terms in Batch, Build FA Terms).

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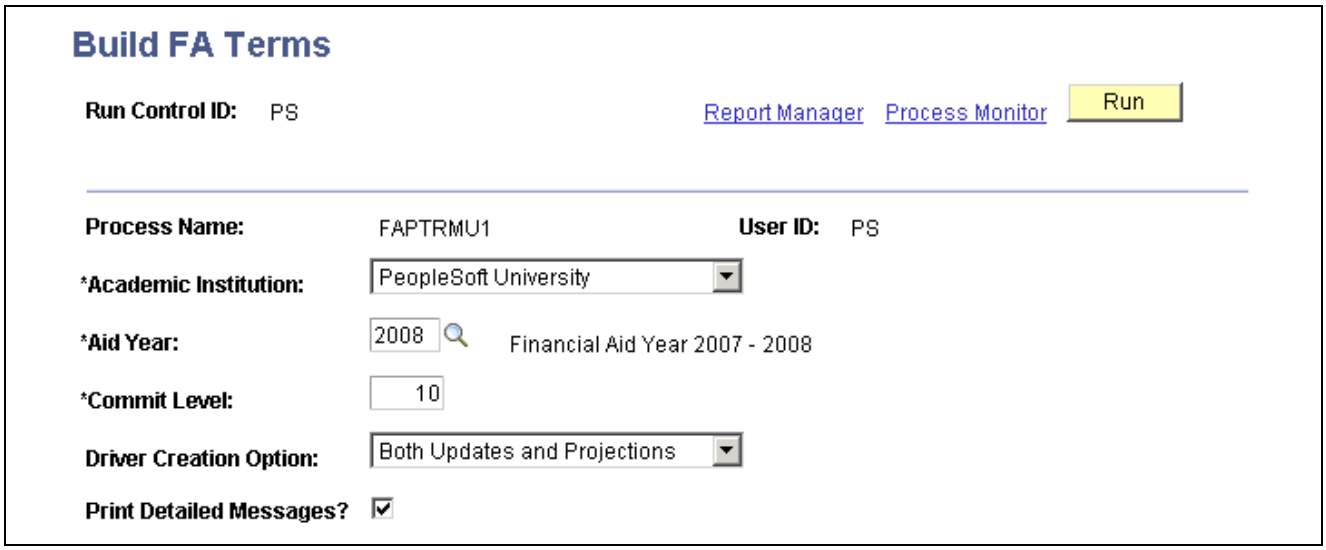

Build FA Terms page

The Academic Institution and Aid Year you select on this page must match the Academic Institution and Aid Year combination on a driver record for which you have run the Create Drivers Recs For FA Trm (create driver records for financial aid term) process (FAPTRMU1).

Commit Level After you enter an Academic Institution, the default institutional commit level, established on the Financial Aid Defaults page, displays. This is the number of records that are processed before the system issues a commit or a save to the database. If your session ends abnormally, this is the maximum number of records that would be lost. For example, if you set the Commit Level to *10*, and an error occurs on the fifteenth student, the system retains the information on the first 10 students.

Driver Creation Option Used to ensure that the records processed are the same as those selected by the last FA Term driver creation process. This should be set to match the last Create FA Term Driver Records run control setting.

Print Detailed Messages Select to have the COBOL log contain information on why a student's financial aid term was built or rebuilt.

Run Run the FA Term Build process (FAPTRMU1) when you are ready to create financial aid terms in batch.

Using the Financial Aid Term Census Report

The Financial Aid Term Census Report identifies those students with award balances for the specified term, which can be an offered amount, authorized amount, or disbursed amount greater than zero. If you use census dates to lock enrollment data, run the report after running the FA Term build following the census date. This will update any non-enrolled students to a term source of *No Data*. Students listed on the report are potential candidates for repackaging and/or reversal of funds.

This section discusses how to identify students not enrolled after census with award balances.

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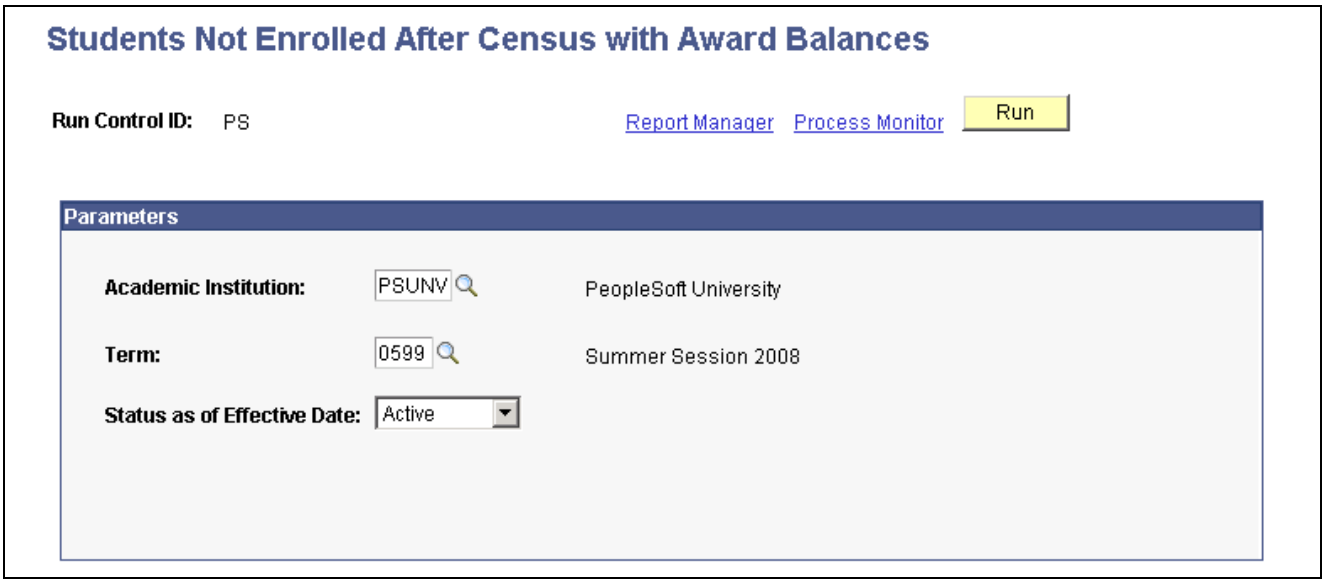
Page Used to Identify Students Not Enrolled After Census with Award Balances

Page Name	Definition Name	Navigation	Usage
Students Not Enrolled After Census with Award Balances	RUNCNTOL_FATRMAWD	Financial Aid, Financial Aid Term, FA Term Census Report, Students Not Enrolled After Census with Award Balances	Identify those students not enrolled for a term after the census data who have an award balance.

Identifying Students Not Enrolled After Census with Award Balances

Access the Students Not Enrolled After Census with Award Balances page (Financial Aid, Financial Aid Term, FA Term Census Report, Students Not Enrolled After Census with Award Balances).



Students Not Enrolled After Census with Award Balances page

Academic Institution Academic institution used to generate the report.

Term Term used to generate the report.

FA Term Effective Status Effective status for the selected term, which can be *Active* (default) or *Inactive.*

Updating Financial Aid Progress Units

The Update FA Progress Units process updates the FA Progress Units field on the Student Enrollment record in Records and Enrollment. Specifically, this process:

1. Updates the Unit Progress FA and Grade Points FA fields on the Student Enrollment record.
2. Updates additional fields on the Student Enrollment record: Operator ID, Last update date, Last update time, and sets the Last Source Enrollment Update equal to "FA".

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3. Triggers an automatic statistics recalculation to FA fields on both the Student Career Term and Student Session records for the enrollment term.
4. Triggers an automatic cumulative statistics recalculation to FA fields on the Student Career Term record for all forward terms in which Reset Cumulative Stats is not enabled.
5. Activates the Tuition Calculation and the FA Statistics Calculation Required flags on the Student Career Term record for the enrollment term.
6. Triggers SAIP events, if enabled.

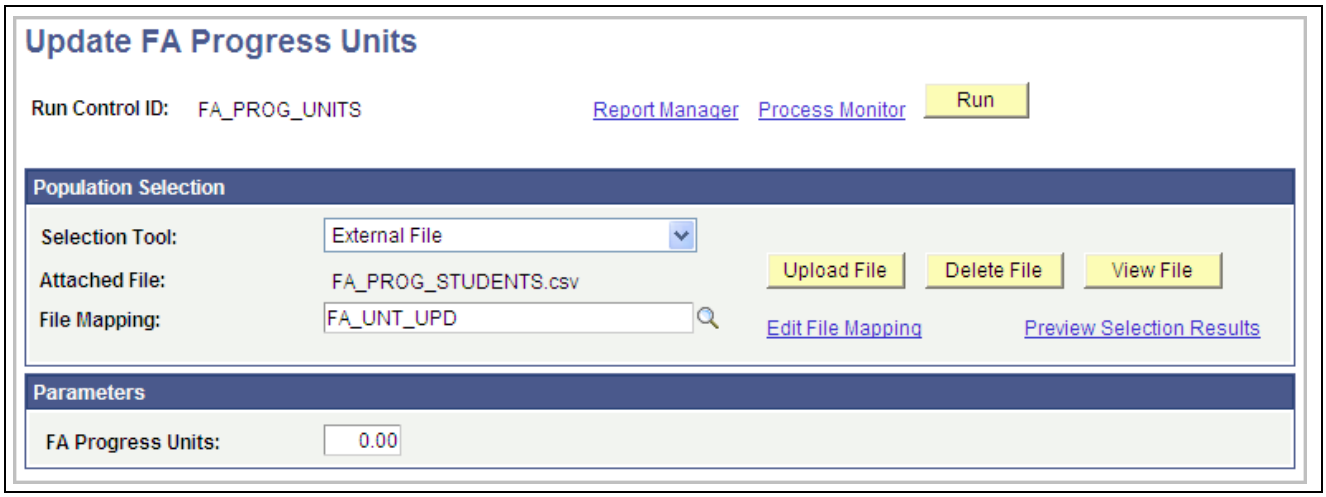
Note. After running the Update FA Progress Units process, you should rebuild FA Term records to incorporate the cascading changes made to FA Progress Units.

Page Used to Update Financial Aid Progress Units

Page Name	Definition Name	Navigation	Usage
Update FA Progress Units	SFA_RUN_FAUNTUPD	Financial Aid, Financial Aid Term, Update FA Progress Units, Update FA Progress Units	Update Financial Aid Progress Units in Student Records.

Updating Financial Aid Progress Units

Access the Update FA Progress Units page.(Financial Aid, Financial Aid Term, Update FA Progress Units, Update FA Progress Units).



Update FA Progress Units page

This page uses the Population Selection feature. For more information on Population Selection,

See [Using the Population Selection Process]Using the Population Selection Process.

Note. All Selection Tool options for Population Selection data input (External File, Query, Equation Engine) must include ID, Academic Career, Institution, Term, and Class Number to update the FA Progress Units correctly.

FA Progress Units Enter the value to which you want Financial Aid Progress Units updated for the selected population.

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