Notifying Students of Financial Aid Awards

Selecting Students and Creating a FAN Extract File

Important! Mass Change is a deprecated product. Support will be maintained for this product, but no new development will be produced for Mass Change. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

This section provides an overview of FAN processing and discusses how to:

- Assign FAN communications manually.
- Assign FAN communications using mass change.
- Review students selected for award notification.
- Select students to include in the extract file.
- Create the FAN extract file and produce the FAN letter.

Understanding FAN Processing

After packaging students, use the FAN to notify students of their financial aid awards. The FAN includes the name of each award, the amount awarded to the student, and any messages that you designated for a particular financial aid item type. When you define financial aid item types, you select award messages to print on the FAN and specify whether the award should be classified as an award item, other resource, or a custom format when printed on the FAN.

To create a FAN:

1. Assign communications to students.

   You can assign a FAN communication to an individual student manually, or you can use Mass Change to assign a FAN communication to a group of students.

2. Select a group of students for which to create an extract file.
3. Create the extract file.
4. Merge the extract file with your selected word processing software to create the actual FAN letter.

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Some particulars for FAN processing:

- Aid year is a merge field to enable printing a FAN for multiple aid years.
- Financial aid item types that are designated to be printed as *Other Resources* are summed together and displayed on the FAN as one item in the Eligibility section of the letter. To provide a breakdown of the *Other Resources* total, each financial aid item type designated to print as *Other Resources* appears as a line item in the Financial Aid Offer section of the letter with term amounts and total award amount shown. The message code of *OTHR* identifies each financial aid item type designated to be printed as *Other Resources.* Awards with the *OTHR* message code are not included in the total financial aid offer amount displayed.
- Adjustment reason codes are included in the data extract process so they appear when the FAN is printed. Adjustment reason codes appear only if there has been a change to an award.

Pages Used to Select Students and Create a FAN Extract File

Page Name	***Definition Name***	***Navigation***	***Usage***
Award Notification Selection	FAN_SEL_LET_MC	Financial Aid, Awards, Notification Letter, View Mass Change Selection, Award Notification Selection	Review students selected to receive a financial aid notification letter during the FAN-Select Letter Mass Change process.
Award Notification Selection (process)	RUNCTL_FAN_SEL	Financial Aid, Awards, Notification Letter, Select Award Letter Data, Award Notification Selection	Select a student or group of students to include in extract file used to generate FAN letters. Choose the address and name to be used on the FAN letter.
Award Letter Data Extract	RUNCTL_FAN_EXTRACT	Financial Aid, Awards, Notification Letter, Create Award Letter Data File, Award Letter Data Extract	Create a FAN extract file.
Award Notification Summary	STDNT_FAN_ATRBT	Financial Aid, Awards, Notification Letter, Award Notification Summary, Award Notification Summary	Review award letters for a student.
Summary of Data Printed on FAN	STDNT_FAN_DATA	Financial Aid, Awards, Notification Letter, View Award Letter Data	View the information that was printed on the student's FAN letter.
Budget Items	STDNT_FAN_BDGT_SEC	Click the Budget Detail link on the Summary of Data Printed on FAN page.	View the budget categories and amounts that constitute the student's cost of attendance.
Term Award Data	STDNT_FAN_AWRD_SEC	Click the Award Detail link on the Summary of Data Printed on FAN page.	View the student's financial aid package by term.

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Assigning FAN Communications Manually

Click the Communication button to access the Communication Management page and assign a FAN communication for an individual student. This button is found on several pages including the:

- Communication Summary page.

  You can use this page to see if a FAN communication has already been assigned to this student.

  See "Reviewing a Summary of Communications" (PeopleSoft Campus Solutions 9.2: Campus Community).

- Financial Aid Status page.

  See Reviewing the Student's Packaging Status.

Assigning FAN Communications Using Mass Change

To assign communications using Mass Change:

1. Update the Mass Change Select Template in the Mass Change Definition component (Campus Community, Communications, Mass Change - Communications, Mass Change Definition) with the criteria that you want to use to select students.

   a. Select *FAN-Select Letter* as the Mass Change Definition.

   b. Select the Campus Solutions page, and enter or update the fields as necessary.

   c. Select the Criteria and Defaults page and use the SQL Statement scroll arrows to find Execution Seq *2,* which has a Description of *Select Application Criteria.*

   d. Update the Field and Field Value entries that you want to use to select students, leaving blank those fields that you are not using.

   e. Select the Generate SQL page, and click the Mass Change Clear Switch button.

   f. Click the Mass Change Generate SQL Swch (mass change generate SQL switch) button.

   g. Click the Count button to make sure that the count (number of students selected) is at least greater than zero.

   h. Click the Save button, and click OK for any warning messages that appear.

2. Run the Mass Change using the Run Mass Change page.

   a. Select the Execute Single Mass Change option in the Mass Change Run Type group box.

   b. In the Mass Change Definition field, select *FAN-Select Letter.*

3. (Optional) Review and edit the selected students on the Award Notification Selection page.

4. Update the Mass Change Update Template in the Mass Change Definition component (Campus Community, Communications, Mass Change—Communications, Mass Change Definition).

   a. Select *FAN-Update Comm Table* as the Mass Change Definition.

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b. Select the Campus Solutions page, and enter or update the fields as necessary.

c. Select the Generate SQL page, and click the Mass Change Clear Switch button.

d. Click the Mass Change Generate SQL Swch (mass change generate SQL switch) button.

e. Click the Count button to make sure that the count (number of students selected) is at least greater than zero.

f. Click the Save button, and click OK for any warning messages that appear.

5. Run the 3C Engine (Campus Community, Communications, Process, 3C Engine).

   a. On the Trigger Table page, select the Mass Change option in the Process 3Cs group box.

   b. Select the Mass Change page.

   c. Enter *FAN-Create-Communication* in the Mass Change Group ID field.

   d. Click the Run button.

Related Links

Assigning FAN Communications Using Mass Change

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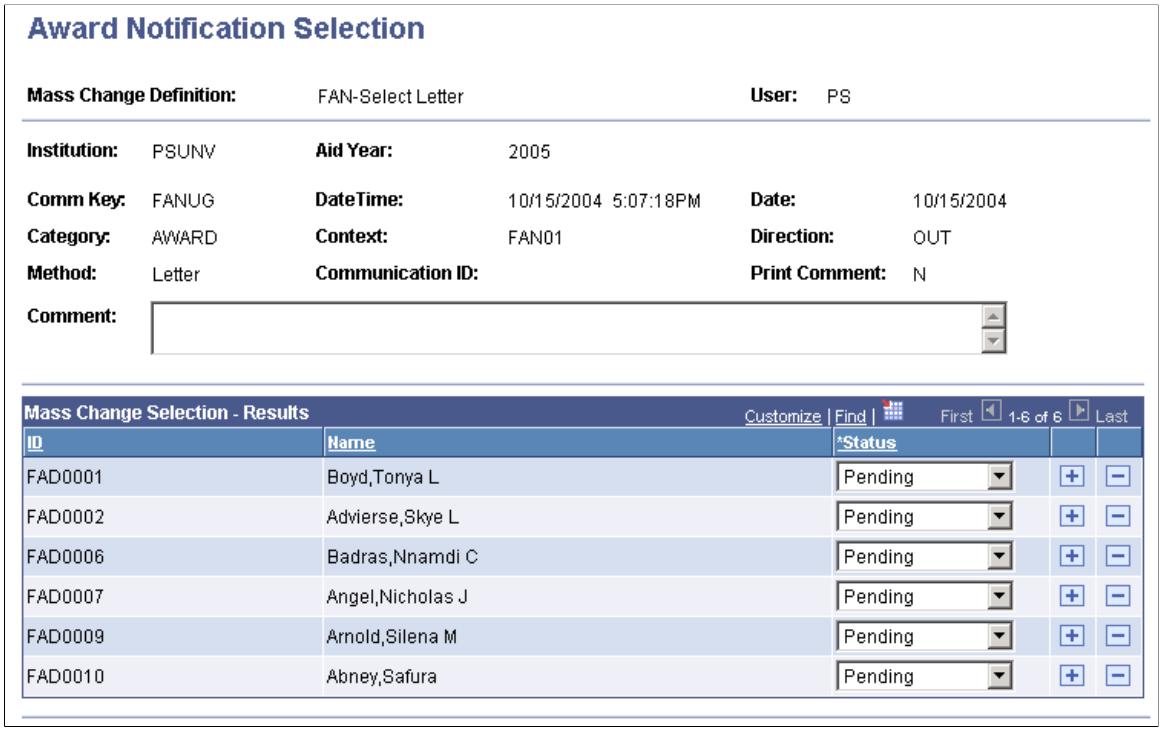
Reviewing Students Selected for Award Notification

Access the Award Notification Selection page (Financial Aid, Awards, Notification Letter, View Mass Change Selection, Award Notification Selection).

Image: Award Notification Selection page

This example illustrates the fields and controls on the Award Notification Selection page. You can find definitions for the fields and controls later on this page.



The Mass Change Selection - Results group box lists the students who are selected to receive a FAN by the mass change process.

Status

Specifies the current status of the student's FAN communication, and determines whether the student is selected for inclusion in the extract file. As long as the student does not have a status of *Cancel,* the student is selected for inclusion in the extract file. To prevent a student from receiving a FAN letter, you can either change the student's status to *Cancel* or you can delete the student's row.

Cancel: Select this value to prevent the student from having a FAN communication assigned.

Pending: The student has been selected to have a FAN communication assigned, but it has not yet been assigned (the 3C Engine still needs to be run).

Successful: Indicates that a FAN communication has been successfully assigned to the student.

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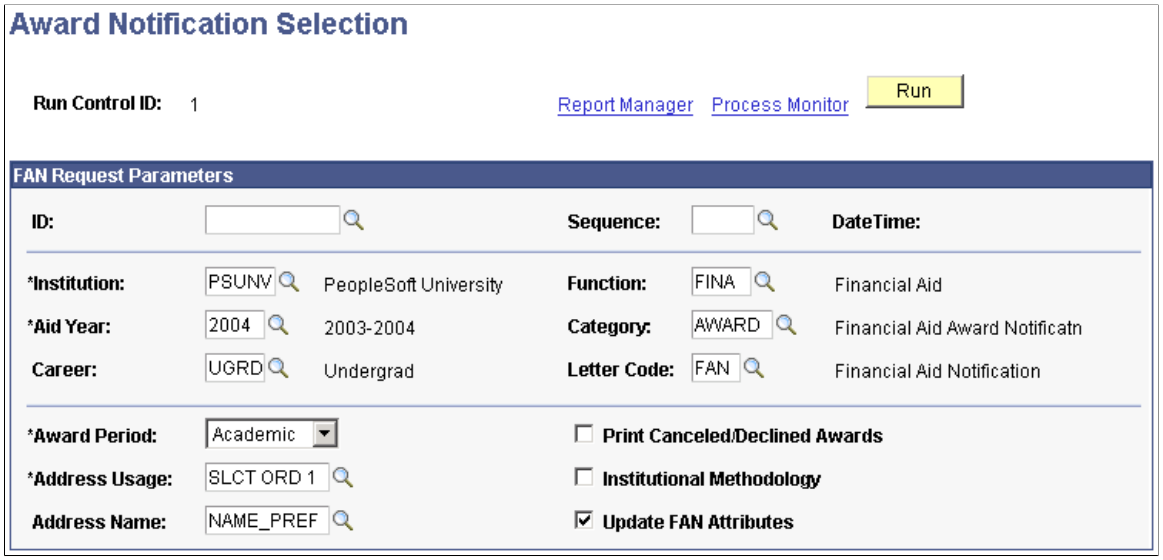
Selecting Students to Include in the Extract File

Access the Award Notification Selection (process) page (Financial Aid, Awards, Notification Letter, Select Award Letter Data, Award Notification Selection).

Image: Award Notification Selection (process) page

This example illustrates the fields and controls on the Award Notification Selection (process) page. You can find definitions for the fields and controls later on this page.



ID

To print a FAN letter for only one student, select the student's ID number in this field. Only students who have been assigned a communication with a function of *FINA* are available for selection. If you want to select a group of students, leave this field empty.

Sequence

If you want to print a FAN letter for a group of students, leave this field blank. Select a specific communication for the student. If you leave this field blank, the most recent communication is used. When you select a sequence number, the system populates the Institution, Function, Aid Year, Category, and Letter Code fields.

Institution

If you are selecting a group of students for which to run this process, select the institution that the students attend. When you complete this field, the system automatically populates the Function and Aid Year fields.

If you selected an ID, this field is already populated.

Function

The administrative function of the Communication. *FINA* is the default.

Category

Select *AWARD* for the FAN letter.

Career

If you select an ID and a sequence, you can select a career for the student. If you select a career, only awards for that career are printed on the FAN. If you do not select a career, then awards

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for all the student's careers are printed on the FAN. If the student is a multiple career student and you want awards for all careers printed on the FAN, do not select a career.

When selecting a group of students, if you select a career, then only the awards for that career for each student are printed on the FAN. If you have multiple career students and you want awards for all their careers to be printed on the FAN, do not select a specific career.

Letter Code Select *FAN* for the FAN letter.

Award Period Select the award period for which you want the FAN letter created. The default value is *Academic. Non Std* (non standard) is also available for nonacademic terms. FA Term determines the default for these periods and uses the last effective-dated sequence or effective-dated status. For example, if the default is *Academic* and because different academic statuses are available in FA Term, such as fall 2006-2007, spring 2006-2007, and summer 2007-2008, the system uses the last effective-dated sequence or effective-dated status for that aid year.

Address Usage The address usage determines which address is printed on the FAN letter. Address usage is defined by your institution.

Address Name Select the address name that you want to use for this FAN letter. This determines what name is printed on the FAN letter. Address name is defined by your institution.

Print Canceled/Declined Awards Select if you want the FAN letter to print canceled and declined awards in addition to offered and accepted awards.

Institutional Methodology Select if you want institutional costs to be included as part of the FAN letter data. The institutional costs are summed into the Personal/Miscellaneous budget category.

Update FAN Attributes Select to update the information on the Award Notification Summary page and mark the communication record completed. Clear the check box to run the selection process in test mode.

Run Run the Select students who need a FAN process (FANSEL) when you are ready to select students for the extract file.

Note: Be sure to run the FANSEL process in update mode at least once. If you never run the process in update mode the communication request is never marked as completed and it may always be selected for award notification. If you forget to Update FAN Attributes on this step, you can also update it during the Extract File Creation step.

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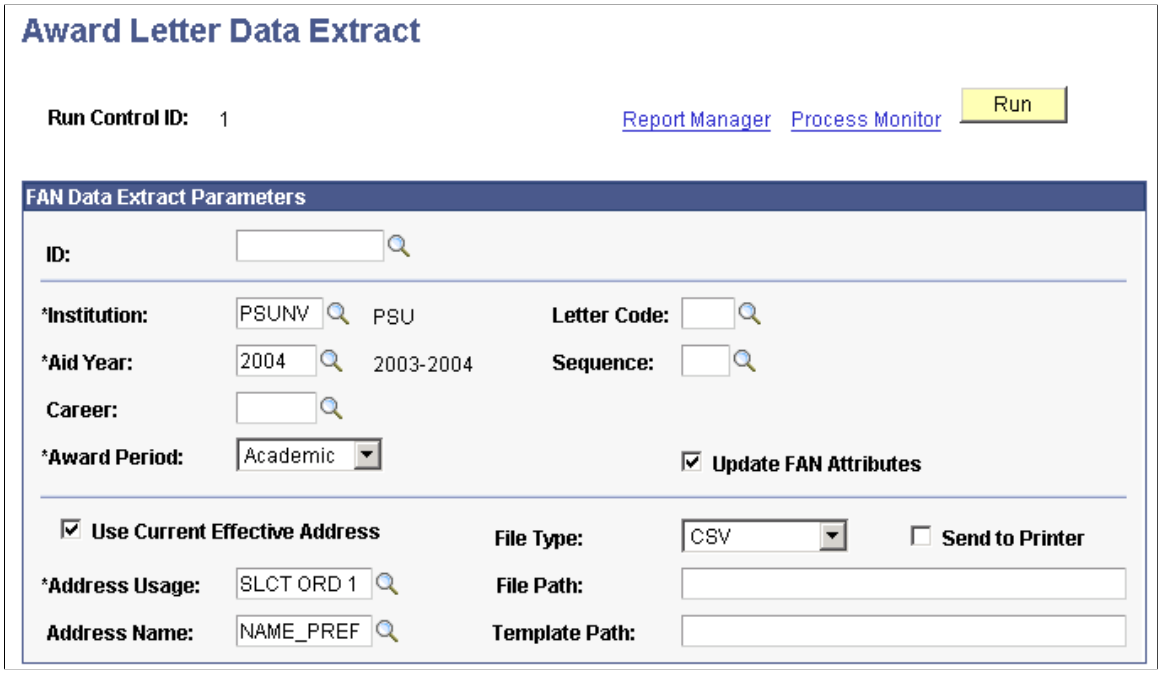
Creating the FAN Extract File and Producing the FAN Letter

Access the Award Letter Data Extract page (Financial Aid, Awards, Notification Letter, Create Award Letter Data File, Award Letter Data Extract).

Image: Award Letter Data Extract page

This example illustrates the fields and controls on the Award Letter Data Extract page. You can find definitions for the fields and controls later on this page.



ID

Select the student that you are working with if you are creating a FAN letter for only one student. If no ID is selected, all students who have been selected to receive a FAN are included in the extract file.

Letter Code

Select *FAN*.

Sequence

This number distinguishes between versions of letters sent to a student. Each time a new communication and award notification letter (FAN) are requested, a sequential number is assigned to the award notification letter. This sequence is increased by one each time an additional award notification letter is requested. The sequence number allows you to select which version of the award notification letter that you want to use if an ID is entered.

Career

If you select an ID and a sequence number you can select a career for the student. If you select a career, only awards for that career are printed on the FAN. If you do not select a career, then awards for all the student's careers are printed on the FAN. If the student is a multiple career student and you want awards for all careers printed on the FAN, do not select a career.

When selecting a group of students for whom to run this process, if you select a career, then only the awards for that

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career for each student are printed on the FAN. If you have multiple career students and you want awards for all their careers to be printed on the FAN, do not select a career.

Award Period

Select the award period for which you want the FAN letter created. The default value is *Academic. Non Std* (non standard) is also available for nonacademic terms.

FA Term determines the default for these periods and now uses the last effective-dated sequence or effective-dated status. For example, if the default is *Academic* and because different academic statuses are available in FA Term, such as fall 2006-2007, spring 2006-2007, and summer 2007-2008, the system uses the last effective-dated sequence or effective-dated status for that aid year.

Update FAN Attributes

Select to update the Print Status field on the Award Notification Summary page and update the communication record. Clear to run the process in test mode only.

Use Current Effective Address

Select to have the Create Award Data Extract process (FANLTR) re-select the student's name and address information using the information that you enter in the Address Usage and Address Name fields on this page. Clear to have the extract file contain the name and address chosen during the FANSEL process.

Address Usage

The address usage determines which address is printed on the FAN letter. Address usage is defined by your institution. The default value is the address usage from the student selection process.

Address Name

Select the address name to use for this FAN letter. This determines what name is printed on the FAN letter. Address name is defined by your institution. The default value is the address name from the student selection process.

File Type

Select the extract file type to be created. Values are: *JetForm, CSV,* and *Other. JetForm* is the default value. The value that you select in this field determines what other file-related fields appear on the page.

If you select *JetForm,* the page displays the File Path and Override Flags fields.

If you select *CSV,* the page displays the Send to Printer check box, the File Path field, and the Template Path field.

If you select *Other,* the page displays the File Path field.

Send to Printer

If you select *CSV* for the file type and you want the letter to go directly to the printer during the Microsoft Word merge process, select this check box.

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File Path Enter the full path of where you want the extract file to reside after the FANLTR process is run. Include a / or \ at the end of the path, such as C:\TEMP\ or //user/tmp/. Make sure that the destination folder or directory is a valid share folder or directory on the network.

Template Path If you select *CSV* for the file type, you must indicate where your award letter master document (FANLTR.doc) and your template file (FANLTR.dot) reside. The Microsoft Word merge process uses this information. This location is usually \\PS_HOME \Winword.

Override Flags If you select *JetForm* for the file type, specify print options to use when producing the FAN, such as the number of copies to create.

Run Click to run this request. Process Scheduler runs the Create Award Data Extract process (FANLTR) at user-defined intervals. After the system runs the process successfully, you can retrieve the extract file from the file path you specified. You can then use the extract file in whatever software you use to create the actual FAN letter.

Printing the Award Letter Using Microsoft Word

To perform a merge using Microsoft Word:

1. Use the Award Letter Data Extract page to create a FAN extract file, using CSV for the file type. The date file output has been changed from .LTR (MS-Word) to .CSV.
2. Specify the file path where you want the extract file and the parameter file to go in the *File Path* field. This can be a shared folder on your local machine or a shared folder on any valid network drive path. An example of a file path is C:\TEMP\.
3. Run the process from the Process Scheduler. When the process completes, the extract file for the FAN (FAN.CSV) and the Word Merge parameters file (FANPARMS.DAT) are located at the file path you specified in Step 2.
4. Move the FANPARMS.DAT file into the C:\TEMP\ folder if it is not already located there.
5. Create a shortcut for MS-Word on your desktop specifically to run the merge process for the FAN letter. You must create this shortcut.
   a. Open Windows Explorer and find the Winword.exe file (usually in C:\Apps\Office\).
   b. Drag the button onto your desktop to create a shortcut.
   c. Right-click the shortcut and select Properties to edit the shortcut properties. Select the Shortcut tab.
   d. Edit the Target field to include the following parameter path values for launching the Winword file, template, and macro. In this example, we are pointing to C:\PS\LS8\Winword\ to find the FANLTR.DOT file, but you must enter the valid directory where the template resides on your system. However, you must enter /mPRCSFANLTR for the name of the macro.

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You must use a space to separate the path for launching the Winword file (which should already be in the Target field) from the path to the template and to separate the path to the template from the macro name. For example: C:\Apps\Office97\Office\WINWORD.EXE C:\PS\LS\Winword \FANLTR.DOT /mPRCSFANLTR

e. Click OK when you finish editing the Target field.

f. Rename the shortcut to indicate that the shortcut launches the merge process, such as FAN Winword.exe.

g. Double-click the Word desktop shortcut you created to launch the merge process. The merge process creates a file called SAFANLTR.DOC in the C:\TEMP\ folder.

h. Open the SAFANLTR.DOC file and print the FAN letters.

Note: If you select the Send to Printer check box on the Award Letter Data Extract page, the file prints automatically on your default printer.

Warning! If you are using Microsoft Office 2000, you must have applied service pack SR1 for the FAN to print. If you have not applied the service pack, the FAN does not print.

Setting Up FAN Printing Using the Forms Engine

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

This section provides an overview of Forms Engine FAN printing and discusses how to:

- Set up FE Award notification form types.
- Set up FA demographic use information.
- Set up the sort order.
- Set up a printer.
- Set up FE award notification equations.
- Set up FE award notification defaults.

Understanding Forms Engine FAN Printing

Prior to 2003-2004, printing FAN letters required you to initiate a process within the Packaging feature of Financial Aid. Navigate to Report Manger to view the results and print the FAN. Through the use of Forms Engine, an Application Engine program that outputs information in PostScript format, you can print FAN letters directly to your PostScript printer without leaving Packaging. Using Forms Engine for printing FAN eliminates the need for JetForm, Crystal Reports, and Word Merge.

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The process prints the award notifications and updates a communications table to indicate that an award communication has been sent. You can initiate a process to print a single FAN letter for an individual student or for students in batch.

The previous process for printing FAN letters remains available. However, the new process is more streamlined and efficient than the previous process.

Pages Used to Set Up FAN to Print Using Forms Engine

Page Name	*Definition Name*	*Navigation*	*Usage*
FE Award Notification Form Types (forms engine award notification form types)	FANLTR_FORM_TYPE	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Notification Form Types, FE Award Notification Form Types	Set notification form types.
FA Process Demographic Use	FA_PRCSDEMO_TBL	Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use	Indicate from where the student's data should be gathered.
Sort Order Names	SORT_NAME_TBL	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Sort Order Names, Sort Order Names	Set the default criteria for the Setup Defaults and Run Controls.
FE Award Notif. Select. Eqtns (forms engine award notification selection equations)	FANLTR_EQTN_SEL	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Selection Equations, FE Award Notif. Select. Eqtns	Set up the table for FAN equations.
Printer Name	PRINTER_TBL	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Printer Names, Printer Name	Set up table for list of available printers. It allows you to define local printer options.
FE Award Notification Defaults (forms engine award notification defaults)	FANLTR_DEFAULTS	Financial Aid, Awards, Notification Letter, Award Notification Defaults, FE Award Notification Defaults	Set award notification default information.

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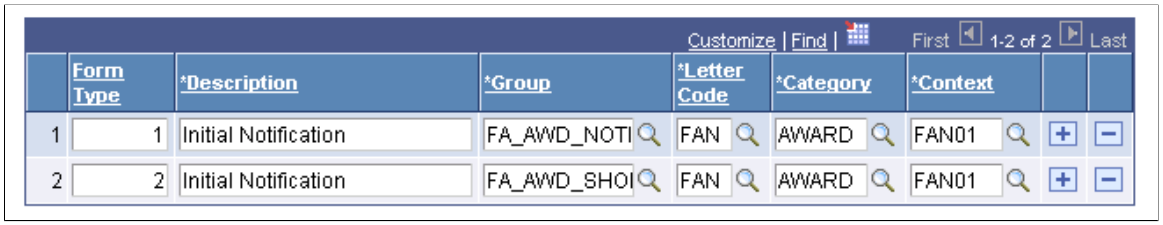
Setting Up FE Award Notification Form Types

Access the FE Award Notification Form Types page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Notification Form Types, FE Award Notification Form Types).

Image: FE Award Notification Form Types page

This example illustrates the fields and controls on the FE Award Notification Form Types page. You can find definitions for the fields and controls later on this page.



Customize | Find | First 1-2 of 2 Last

	Form Type	*Description	*Group	*Letter Code	*Category	*Context		
1	1	Initial Notification	FA_AWD_NOTI	FAN	AWARD	FAN01		
2	2	Initial Notification	FA_AWD_SHOI	FAN	AWARD	FAN01		

Form Type Identifies the form type for this award notification.

Description Describes the delivered form type. Form Type 1 is the initial notification of financial aid. Form Type 2 is shorter version of the initial notification.

Group Identifies in which group of letters this letter code exists.

Letter Code The code from the Campus Community Standard Letters page for this communication. You can define the letter code for the FE FAN process.

Category The communications category associated with this letter code. You can define the category for the FE FAN process.

Context The context from the Campus Community Communications Context page that is included in this category. You can define the context for the FE FAN process

Setting Up FA Demographic Use Information

This setup uses the Campus Community components to evaluate Address and Name Usage processing requirements and to indicate from where the student's demographic information should be gathered.

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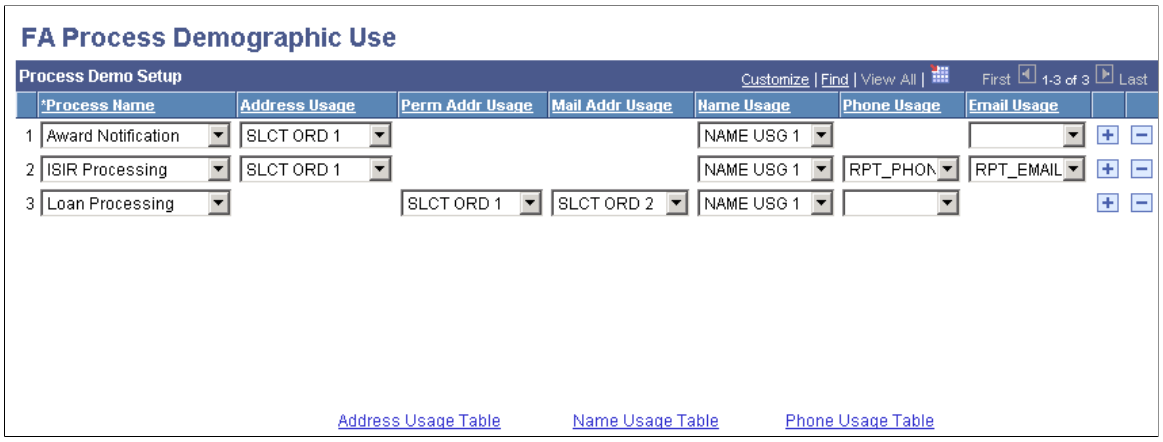
Access the FA Process Demographic Use page (Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use).

Image: FA Process Demographic Use page

This example illustrates the fields and controls on the FA Process Demographic Use page. You can find definitions for the fields and controls later on this page.



Select the appropriate option for each of the fields.

Process Name	*Award Notification* process is new to FE FAN. You must insert a new row and select Award Notification as the process name.
Address Usage	Reserved for financial aid processes and is not used for loans.
Perm Addr Usage (permanent address usage)	Used to set the permanent address for loan processing.
Mail Addr Usage (mail address usage)	Used for temporary address.
Name Usage	Indicates which name to use for the student or borrower.
Phone Usage	Indicates the type of phone such as business phone or cellular phone. Used to select phone usage table settings defined in Campus Community setup.
Email Usage	Indicates the type of email address such as home, business, dorm, campus, or other. Used to select email usage table settings defined in Campus Community setup.
Address Usage Table	Click to access the Address Usage page to define or review address usages.
Name Usage Table	Click to access the Name Usage page to define or review name usages.
Phone Usage Table	Click to access the Phone Usage page to define or review phone usages.

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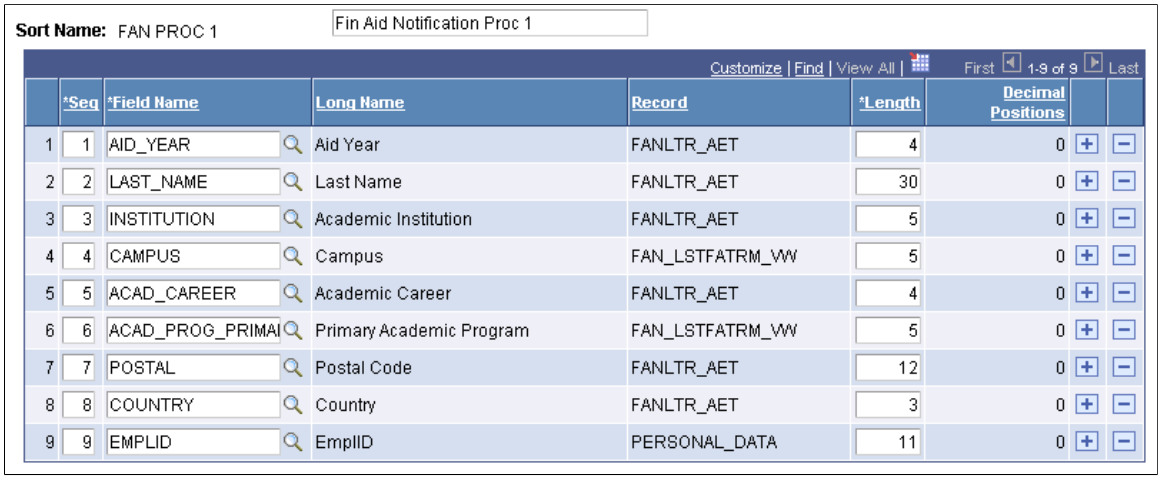
Setting Up the Sort Order

You can sort the data by field to control the order in which the output documents generated by a batch print process appears. Two sort sequences are delivered with the system. FAN PROC 1 displays information by Record, Field Name, Length and Long Name. FAN PROC 2 displays information by Field Name, Long Name, Record, and Length. You must set up any other sort sequences for your institution.

Access the Sort Order Names page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Sort Order Names, Sort Order Names).

Image: Sort Order Names page

This example illustrates the fields and controls on the Sort Order Names page. You can find definitions for the fields and controls later on this page.



Sort Name: FAN PROC 1 Fin Aid Notification Proc 1

Customize | Find | View All | First 1-9 of 9 Last

	*Seq	*Field Name	Long Name	Record	*Length	Decimal Positions
1	1	AID_YEAR	Aid Year	FANLTR_AET	4	0
2	2	LAST_NAME	Last Name	FANLTR_AET	30	0
3	3	INSTITUTION	Academic Institution	FANLTR_AET	5	0
4	4	CAMPUS	Campus	FAN_LSTFATRM_VW	5	0
5	5	ACAD_CAREER	Academic Career	FANLTR_AET	4	0
6	6	ACAD_PROG_PRIMAI	Primary Academic Program	FAN_LSTFATRM_VW	5	0
7	7	POSTAL	Postal Code	FANLTR_AET	12	0
8	8	COUNTRY	Country	FANLTR_AET	3	0
9	9	EMPLID	EmplID	PERSONAL_DATA	11	0

Sort Name The name of the sort sequence.

Seq (sequence) The hierarchy of how you want data to sort. Use a Zip Code sort to obtain information in the order to use for a bulk mailing.

Field Name The name of the field.

Length The character length of the previous field.

Field Long Name The full name of the field displayed.

Decimal Positions Displays how many positions appear after the decimal point if this is a numeric field.

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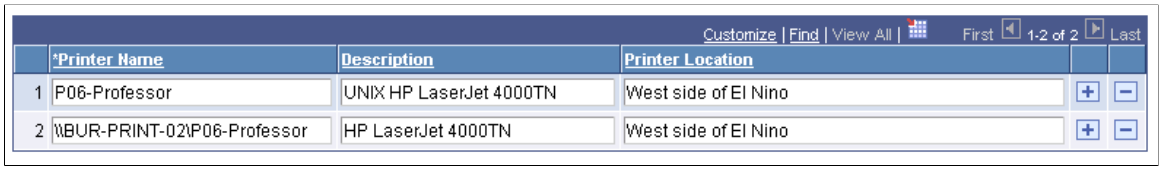
Setting Up a Printer

Access the Printer Name page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Printer Names).

Image: Printer Name page

This example illustrates the fields and controls on the Printer Name page. You can find definitions for the fields and controls later on this page.



Printer Name Enter the printer name and location of the path.

Description Enter the description of the printer.

Printer Location Enter the printer location.

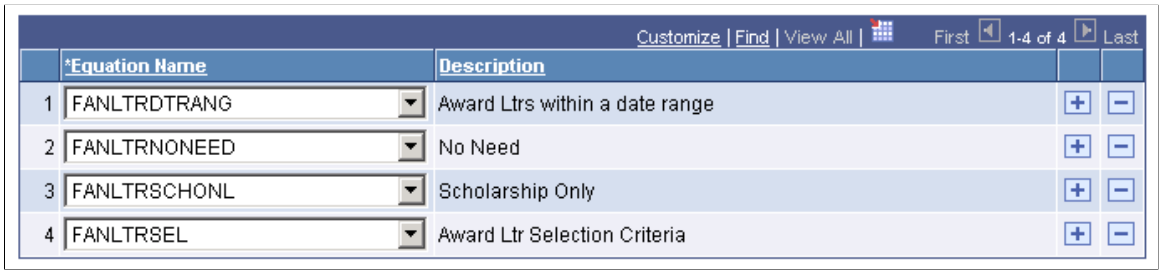
Setting Up FE Award Notification Equations

Access the FE Award Notif Select. Eqtns page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Selection Equations).

Note: You must create equations using the Equation Engine prior to setting up the FE Award Notif Select. Eqtns page. See Equation Engine documentation for more information on setting up and using the Equation Engine.

Image: FE Award Notif Select. Eqtns page

This example illustrates the fields and controls on the FE Award Notif Select. Eqtns page. You can find definitions for the fields and controls later on this page.



Equation Name Select the name of the equation.

Description The description of the equation.

Setting Up FE Award Notification Defaults

Access the FE Award Notification Defaults page (Financial Aid, Awards, Notification Letter, Award Notification Defaults).

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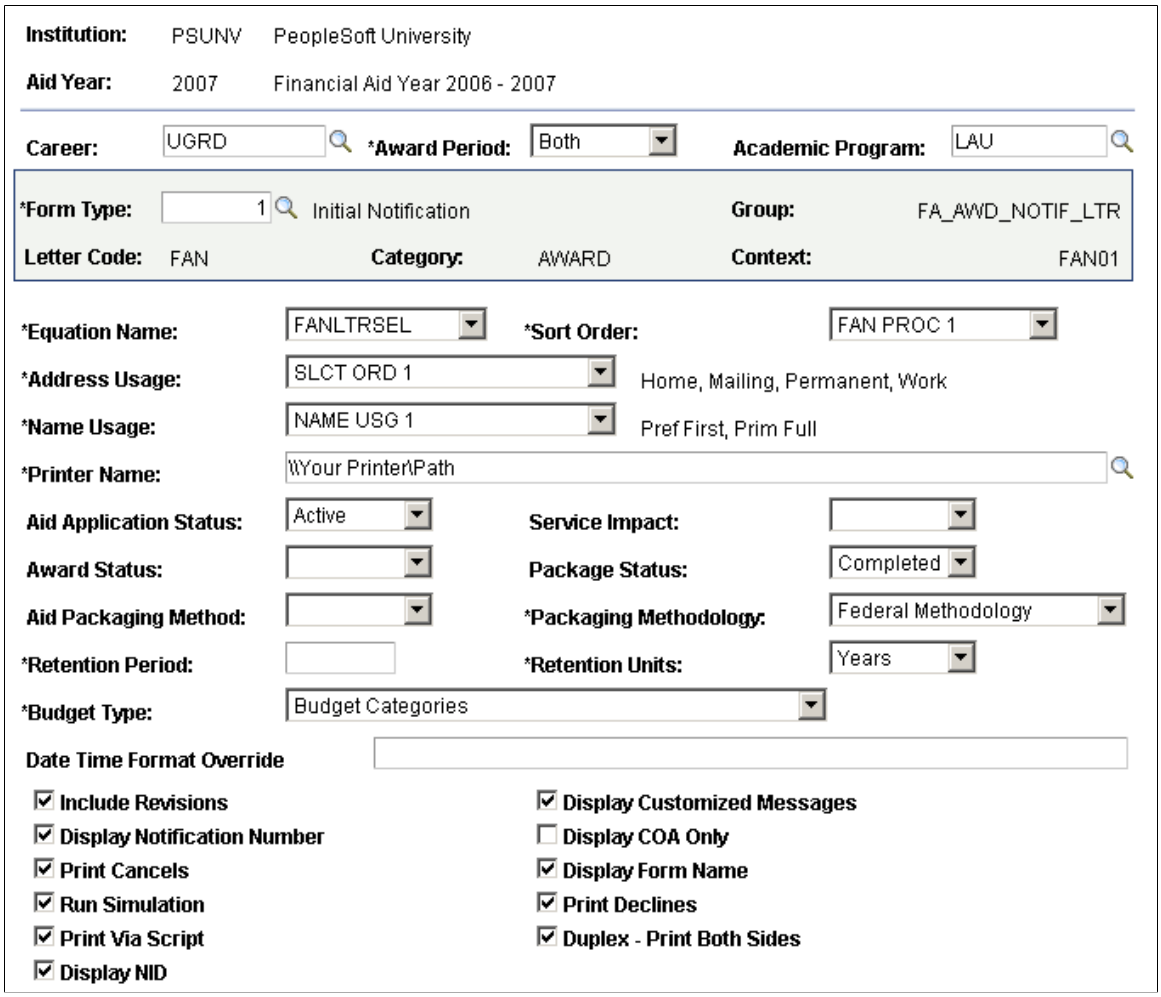
Note: This page is designed to define the initial setup for the One-Up Print Process and Batch Print Run Controls.

Image: FE Award Notification Defaults page

This example illustrates the fields and controls on the FE Award Notification Defaults page. You can find definitions for the fields and controls later on this page.



Career Define the options for financial aid processing. Examples of standard career options are undergraduate or graduate.

Award Period The award period that is used in packaging. Values include: *Academic, Non-Standard,* and *Both.*

Academic Program Academic program values that are used for financial aid processing.

Form Type Define and create the values using the Forms Engine. *Initial Notification 1* and *Initial Notification 2* (Short FAN) are delivered with the system.

Group Define this in the Setting Up the Forms Engine. It identifies the Form Type to a specific processing group.

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Letter code	The code for the letter associated with this communication. You define this on the FE Award Notification Form Type page.
Category	The communications category associated with this letter code. You define this on the FE Award Notification Form Type page.
Context	The context from the Campus Community Communications Context page that is included in this category. You define this on the FE Award Notification Form Type page.
Equation Name	Define this using the Equation Engine. FANLTRSEL (Award Letter Selection Criteria), FANLTRDTRANG (Award Letters within a Date Range), FANLTRNONEED (Students with No Need) are delivered with the system. **Note:** There is a change to the logic behind the FAN letter selection criteria. If you indicate in any of the run controls that cancelled and declined awards should print, the new version of the FANLTRSEL equation excludes letters for students who only have cancelled and declined awards.
Sort Order	Defined using the Sort Order Set Up. Sorts FE FAN output by sorting preferences.
Address Usage	Defined using the Process Demo Set Up. Allows you to override Address Usage options.
Name Usage	Defined using the Process Demo Set Up. Allows you to override Name Usage options.
Printer Name	Defined using the Printer Names Set Up. Allows you to select defined printer.
Aid Application Status	The values are based on Packaging Status Summary. Initially set to *Active.*
Service Impact	Determines whether or not to print a notification based on service impacts.
Award Status	Values are based on the Packaging Award Status field. Initially select *Accepted* or *Offered.*
Package Status	Values are based on the Aid Packaging Status field on the Packaging Status Summary page. You should set this option to *Completed* and never to *Repackage.*
Aid Packaging Method	Values are based on how aid packages were created. Values are *Blank, Auto, Counselor,* and *Not Packaged.* Initially select *Blank* to ensure that the program evaluates all options.
Packaging Methodology	Values are *Federal Methodology* and *Institutional Methodology.*
Retention Period	Indicates the length of time that Forms Engine keeps historical data.

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Retention Units	Indicates the unit used in Retention Period. Use *Years* as the unit to facilitate audit requirements.
Budget Type	Values are *Budget Categories* (Institutional) and *Pell Categories.*
Date Time Format Override	(Optional) As a default, the FE FAN prints the date and time format defined for message catalog entry (138,1), which displays throughout the system. For example, if the message catalog entry is set as dd:MMMM:yyyy, which defines a system date-only format, and you need to display a date and 24-hour format for FE FAN only, enter dd:MMMM:yyyy:HH:mm:ss. For more information on defining date and time formats, see the explanation field for the Message Catalog Entry (138,1) in *PeopleTools: System and Server Administration*, "Using PeopleTools Utilities."
Include Revisions	Select to include revisions made to aid packages in the print job.
Display Notification Number	Select to print the number on the aid notification.
Print Cancels	Select to print the information if an award is cancelled.
Run Simulation	Select to run this print job in simulation mode.
Print Via Script	Select to allow for multi-platform printing.
Display NID	Select to display the student's National ID.
Display Customized Messages	Select to display customized, on demand user-defined messages from the FE Award Notification Student Defaults page Comment Box.
Display COA Only	Select to display the Cost Of Attendance/Budget information on the Aid Notification. The system does not display the resource information on the printed aid notification if you select this option.
Display Form Name	Select to display the name of the form on the printed aid notification.
Print Declines	Select to print the information if a student declines an award.
Duplex - Print Both Sides	Select to allow printing of both sides of a page.

Related Links

"Understanding Equations" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Setting Up FE Award Notification Defaults

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Printing FE FAN Using Forms Engine

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

This section discusses how to:

- Process and print FE FAN letters in batch.
- Process and print an individual FE FAN letter.
- View FE Award Notification inquiries.
- View award notification summary.
- Reprint FE FAN letters.
- View examples of printed FE FAN letters.

Pages Used to Print FAN Using Forms Engine

Page Name	*Definition Name*	*Navigation*	*Usage*
FE FAN Letter Run Control	RUN_CNTL_FANLTR	Financial Aid, Awards, Notification Letter, Award Notification Batch, FE FAN Letter Run Control	Set up to run FAN letters in batch.
FE Award Notification Student Defaults	AWARD_NOTIF_DETAIL	• Financial Aid, Awards, Notification Letter, Award Notification One-Up, FE Award Notification Student Defaults • Click the Award Notification link on the Award Entry page.	Display award status or print an award notification for an individual student.
FE Award Notification Inquiry	AWARD_NOTIF_DETAIL	• Financial Aid, Awards, Notification Letter, Award Notification Inquiry, FE Award Notification Inquiry • Click the Award Notification link on the Packaging Status Summary page.	View award notification detail information.

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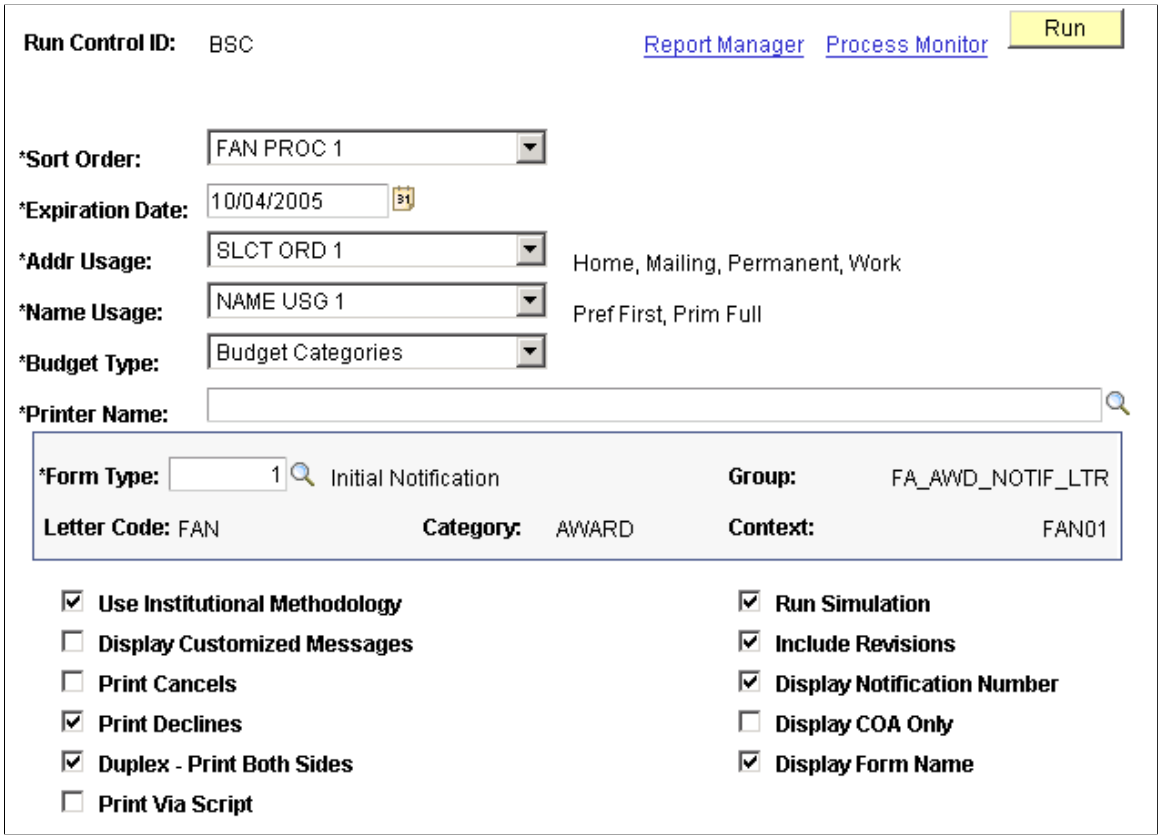
Page Name	*Definition Name*	*Navigation*	*Usage*
FE Award Notification Summary	FANLTR_SUMMARY	Financial Aid, Awards, Notification Letter, Award Notification Summary, FE Award Notification Summary	View a summary of the non-simulation award notification processes and the award notification for an individual student.
FE Award Notification Reprint	FAN_RPRT_RUNCTL	Financial Aid, Awards, Notification Letter, Award Notification Reprint, FE Award Notification Reprint	Reprint an award notification for an individual student.

Processing and Printing FE FAN Letters in Batch

Access the FAN Letter Run Control page (Financial Aid, Awards, Notification Letter, Award Notification Batch, FAN Letter Run Control).

Image: FAN Letter Run Control page (1 of 2)

This example illustrates the fields and controls on the FAN Letter Run Control page (1 of 2). You can find definitions for the fields and controls later on this page.



Expiration Date The date that the information is purged from the system.

Addr Usage (address usage) Defined using the Process Demo Set Up. This allows you to override Address Usage options defined on the FE Award Notification Defaults page.

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Sort Order	Defined using the Sort Order Set Up. This allows you to override the sort order defined in the FE Award Notification Defaults page. It sorts FE FAN output by sorting preferences.
Name Usage	Defined using the Process Demo Set Up. This allows you to override the name usage options defined in the FE Award Notification Defaults page.
Budget Type	Values are *Budget Categories* (Institutional) or *Pell Categories.*
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined in the FE Award Notification Defaults page.
Form Type	Defined in the Setting Up the Forms Engine. Identifies the form type to a specific processing group.
Group	Defined in Award Notification Form Type Set Up. Identifies in which group of letters this letter code exists.
Letter Code	The code from the Campus Community Standard Letters page for this communication. You define this on the FE Award Notification Form Type page.
Category	The communications category associated with this letter code. You define this on the FE Award Notification Form Type page.
Context	The context from the Campus Community Communications Context page that is included in this category. You define this on the FE Award Notification Form Type page.
Use Institutional Methodology	Select to use institutional methodology.
Display Customized Messages	Select to display customized, on demand user defined messages from the FE Award Notification Student Default page Comment Box.
Print Cancels	Select to print the information if an award is canceled.
Print Declines	Select to prints the information if an award is declined.
Print Via Script	Select to allow for multi-platform printing.
Run Simulation	Select to run this print job in simulation mode.
Include Revisions	Select to include revisions made to aid packages in the print job.
Display Notification Number	Displays number counter of letter. This information prints on the aid notification.
Display COA Only	Select to display the Cost Of Attendance/Budget information on the aid notification. The system does not display recourse information on the printed aid notification if you select this option.

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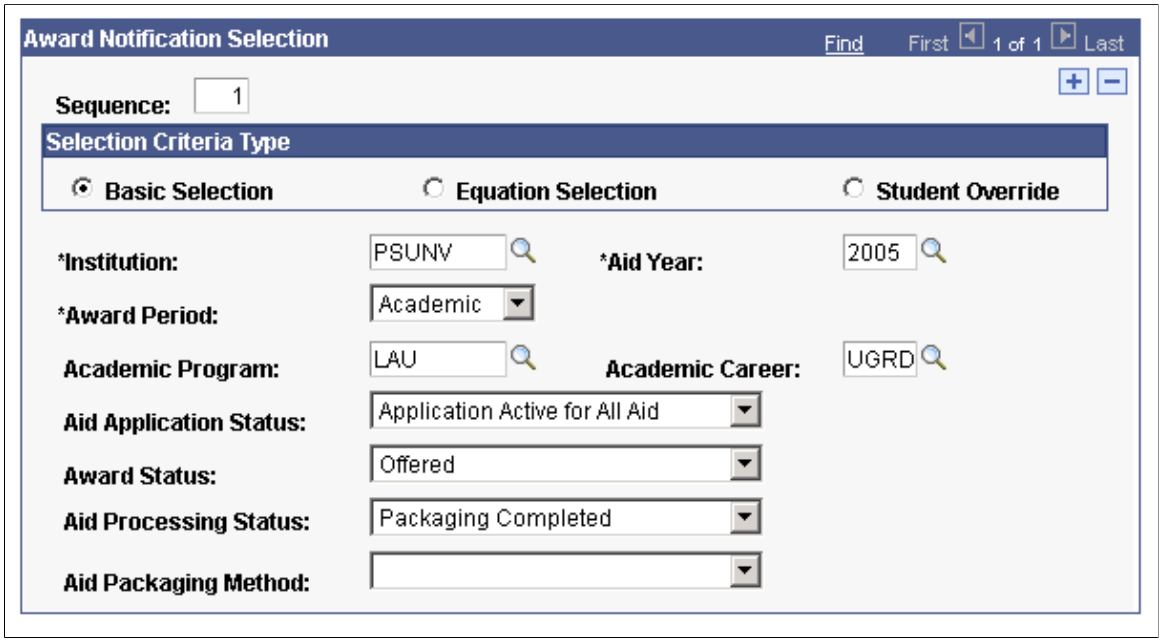
Display Form Name Select to display the name of the form on the printed aid notification.

FAN Letter Run Control with Basic Selection

Access the FAN Letter Run Control page with Basic Selection (Financial Aid, Awards, Notification Letter, Award Notification Batch, FAN Letter Run Control).

Image: FAN Letter Run Control page with Basic Selection

This example illustrates the fields and controls on the FAN Letter Run Control with Basic Selection). You can find definitions for the fields and controls later on this page.



Sequence Indicates the sequence number.

Selection Criteria Type Values include *Basic Selection, Equation Selection,* and *Student Override.*

Note: The system displays the following fields when you select *Basic Selection.* Use the fields to define a simple population selection.

Award Period The award periods used in packaging. Values include: *Academic, Non-Standard,* and *Both.*

Academic Program Academic program values used for financial aid processing.

Academic Career Define the careers for financial aid processing.

Aid Application Status Values are based on Packaging Award Status field. You should set this option to *Accepted* or *Offered.*

Award Status Values are based on Packaging Status Summary field, Aid Packaging Status. You should select *Packaging Completed.*

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Aid Processing Status Values based on how aid packages were created. Values include *Blank, Auto, Counselor,* and *Not Packaged.* Initially select *Blank* to ensure that the program evaluates all options.

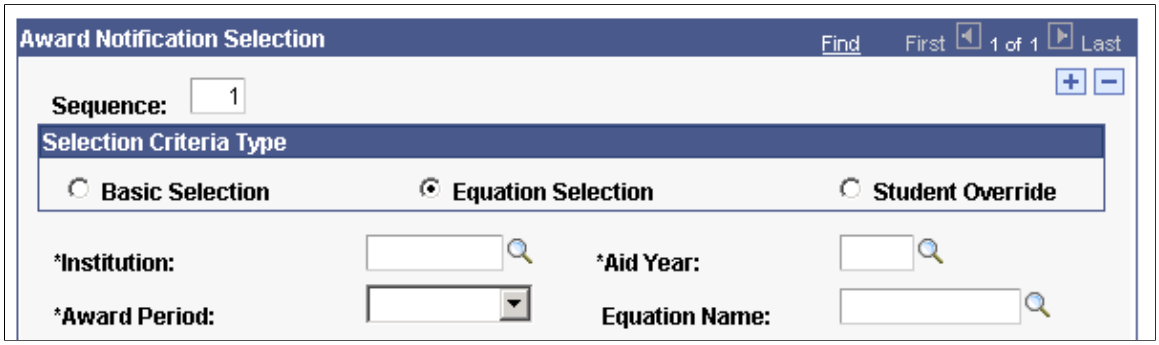
Aid Packaging Method Values are based on Packaging Award Status field. You should select *Accepted* or *Offered.*

FAN Letter Run Control with Equation Selection

Access the FAN Letter Run Control page with Equation Selection (Financial Aid, Awards, Notification Letter, Award Notification Batch, FAN Letter Run Control).

Image: FAN Letter Run Control page with Equation Selection

This example illustrates the FAN Letter Run Control page with Equation Selection.



This selection allows you to select a batch printing population defined by using an equation.

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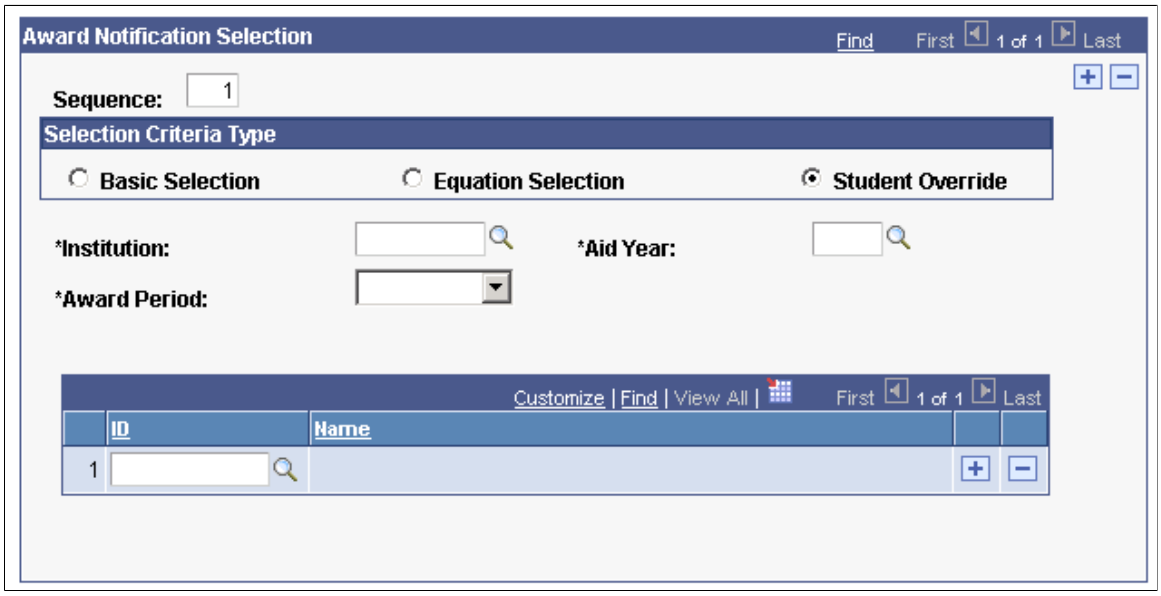
FAN Letter Run Control with Student Override Selection

Access the FAN Letter Run Control page with Student Override (Financial Aid, Awards, Notification Letter, Award Notification Batch, FAN Letter Run Control).

Image: FAN Letter Run Control page with Student Override Selection page

This example illustrates the FAN Letter Run Control page with Student Override Selection page.



This selection allows you to run batch processes for a single or multiple student IDs if row insert is used.

Processing and Printing an Individual FE FAN Letter

Access the FE Award Notification Student Defaults page (Financial Aid, Awards, Notification Letter, Award Notification One-Up, FE Award Notification Student Defaults).

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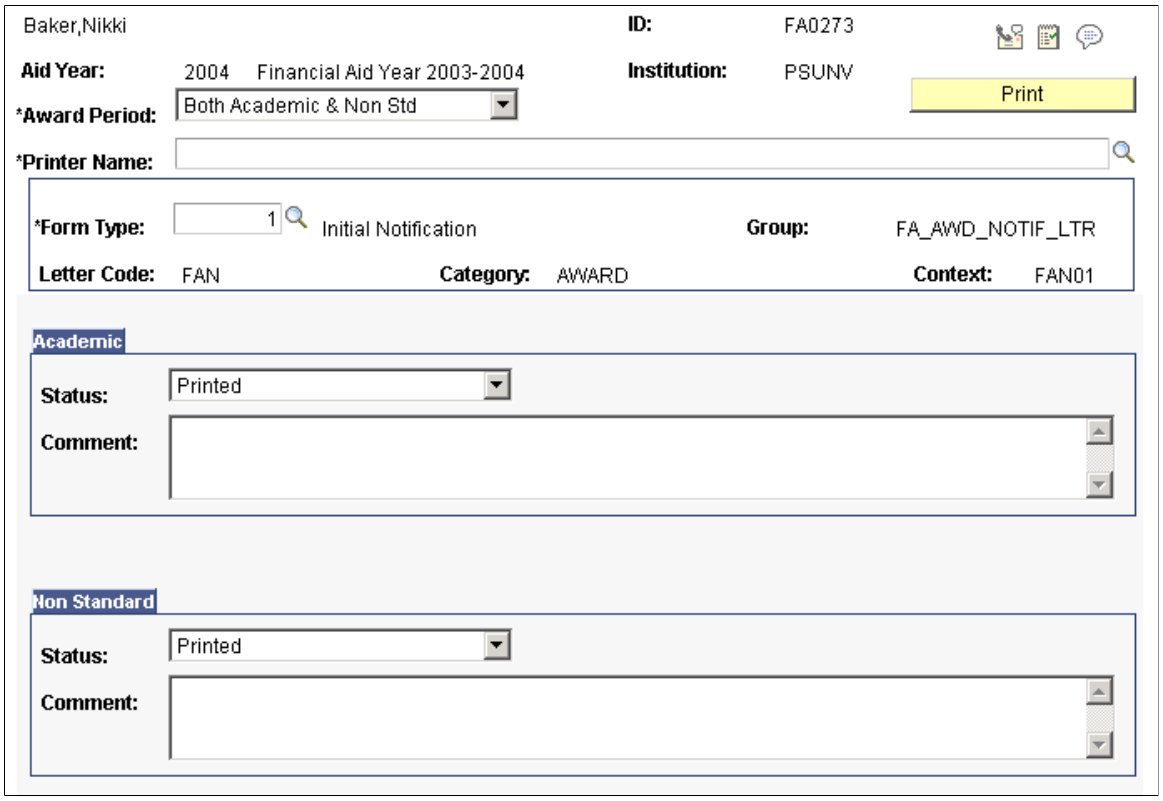
Note: You must first set default values on the Default Setup Page before using the FE Award Notification Detail page.

Image: FE Award Notification Student Defaults page

This example illustrates the fields and controls on the FE Award Notification Student Defaults page. You can find definitions for the fields and controls later on this page.



Note: The OK, Cancel, and Apply buttons appear below the page when you access it by clicking the Award Notification link on the Award Entry, Student Aid Package page.

The system displays the ID, Aid Year, and Institution.

Award Period Award periods used in packaging. Values include *Academic, Non-Standard,* and *Both.*

Printer Name Defined using the Printer Names Set Up. This allows you to override printer selection defined on the FE Award Notification Defaults page.

Form Type Use the Forms Engine to define and create options. Initial Notification Option 1 and Option 2 (Short FAN) are delivered with the system.

Group Defined in the Setting Up the Forms Engine. Identifies the Form Type to a specific processing group.

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Letter Code The code from the Campus Community Standard Letters page for this communication. Define this on the FE Award Notification Form Type page.

Category The communications category associated with this letter code. Define this on the FE Award Notification Form Type page.

Context The context from the Campus Community Communications Context page included in this category. Define this on the FE Award Notification Form Type page.

Academic

Status Values include:

Blank: Package does not exist.

Initial: Automatically switches to this status in preparation of the print process. You can manually reset this after the letter is run in real time. This status does not change to printed if you run the job in simulation.

Hold: Holds the print option for this award period.

Revised: Automatically switches to this status after the initial letter prints. You can manually reset this after the letter is run in real time. This status does not change to printed if you run this job in simulation.

Comment This allows you to write free form text. This comment prints if the Display Customized Messages check box is selected either on the FE Award Notification Defaults page or the FE Award Notification Run Control. The system prints this customized message in addition to any item type related message.

Non-Standard

Status Values include:

Blank: Package does not exist.

Initial: Automatically switches to this status in preparation of the print process. You can manually reset this after the letter is run in real time. This status does not change to printed if you run the job in simulation.

Hold: Holds the print option for this award period.

Revised: Automatically switches to this status after the initial letter prints. You can manually reset this after the letter is run in real time. This status does not change to printed if you run this job in simulation.

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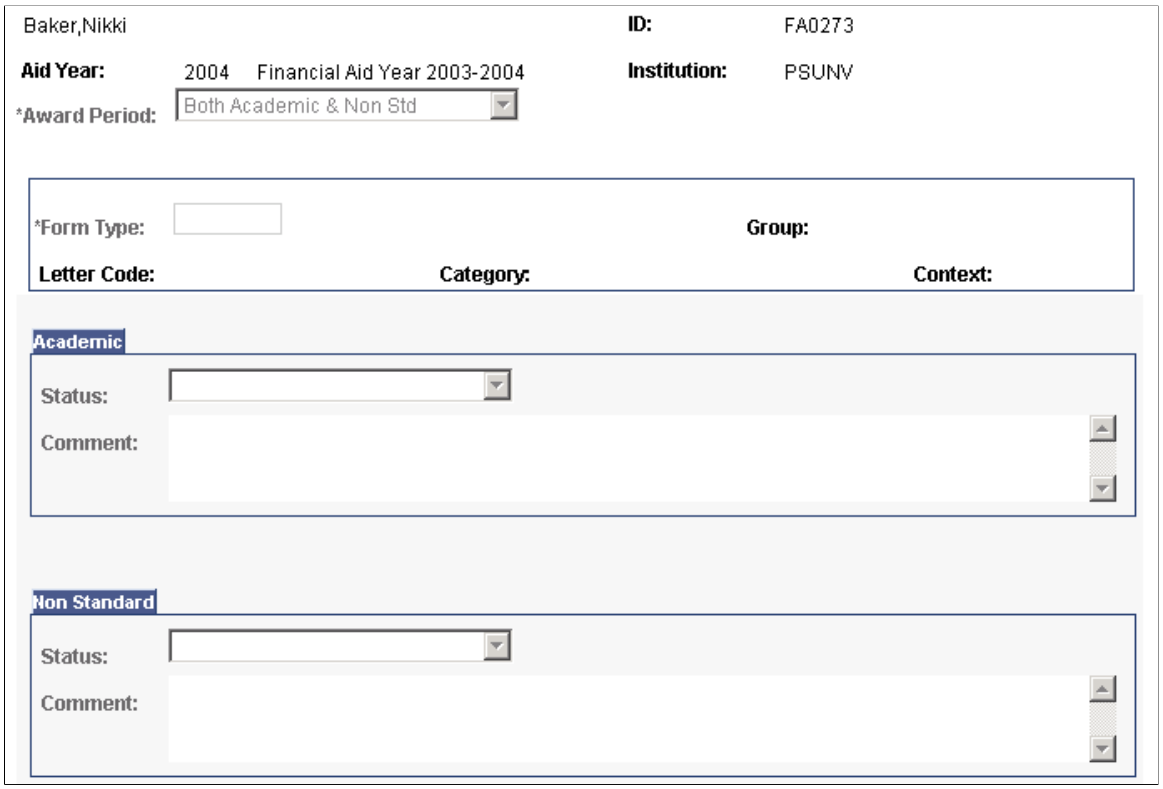
Comment This allows you to write free form text. This comment prints if the Display Customized Messages check box is selected either on the FE Award Notification Defaults page or the FE Award Notification Run Control. The system prints this customized message in addition to any item type related message.

Viewing FE Award Notification Inquiries

Access the FE Award Notification Inquiry page (click the Award Notification link on the Packaging Status Summary page).

Image: FE Award Notification Inquiry page

This example illustrates the fields and controls on the FE Award Notification Inquiry page. You can find definitions for the fields and controls later on this page.



This page is view only. It is intended for front-line users with limited access or security. You cannot process actions or invoke processes from this page.

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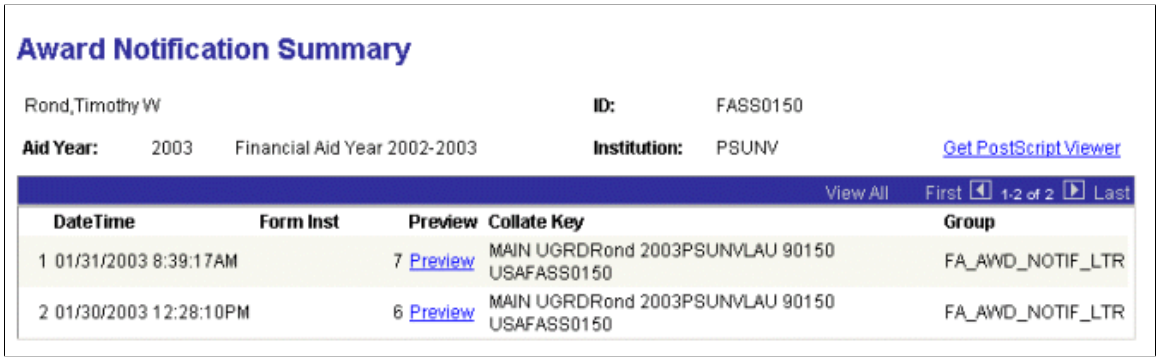
Viewing Award Notification Summary

Access the Award Notification Summary page (Financial Aid, Awards, Notification Letter, Award Notification Summary).

Image: Award Notification Summary page

This example illustrates the fields and controls on the Award Notification Summary page. You can find definitions for the fields and controls later on this page.



Note: To use the preview link, you must load the Get Post Script Viewer program. This program is freeware. You must load the GSVIEW and the GNU GHOSTSCIPT programs from this link.

This page is view only. It is intended for front-line users with limited access or security.

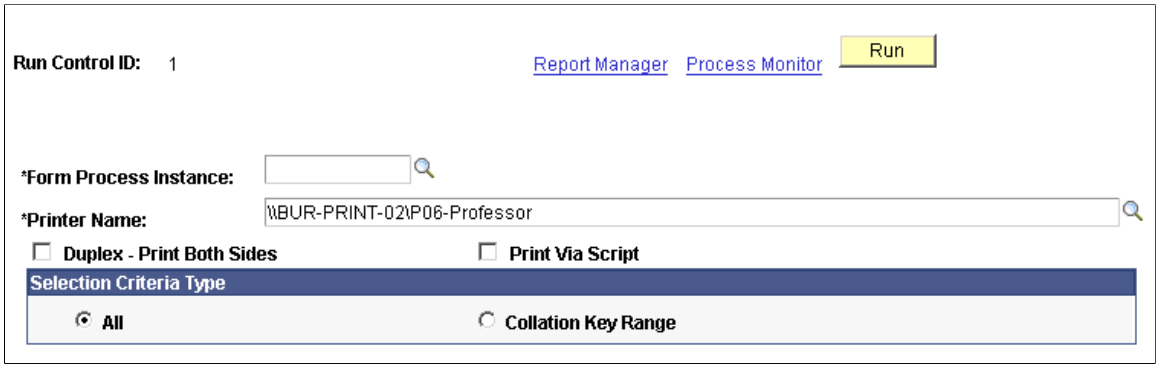
Click the Preview link to view and reprint a copy of the FE FAN letter associated with the Form Instance number.

Reprinting FE FAN Letters

Access the Award Notification Reprint page (Financial Aid, Awards, Notification Letter, Award Notification Reprint).

Image: Award Notification Reprint page

This example illustrates the fields and controls on the Award Notification Reprint page. You can find definitions for the fields and controls later on this page.



The system displays the Run Control ID.

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Form Process Instance	This information comes from Process Monitor Log Files.
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined on the FE Award Notification Defaults page.
Print Via Script	Select to allow for multi-platform printing.
Selection Criteria Type	Values include: *All:* Allows you to reprint the entire batch of students for the form process instance. *Collation Key Range:* Allows you to reprint an individual student or a range of students.

Modifying FE FAN Form Letter Templates

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

This section discusses how to:

- Change an address.
- Change messages and instructions.

Note: You may want to consult your technical support group before implementing this procedure.

Changing an Address

The system uses the school address information from the Academic Institution Table for the FE FAN letter. To change an academic institution's address, use the Academic Institution 1 page by navigating to Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table.

Changing Messages and Instructions

You can update or change messages and instructions.

To change the *Please return within 90 days.* message:

1. Navigate to PeopleTools, Utilities, Use, Message Catalog.
2. Enter *14402* in the Message Set Number field and click Search.
3. Click Find and enter *98* in the Explorer User Prompt dialog box.
4. Click OK.

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5. Use the Message Text field to update the message text.
6. Save your changes.

To change the *Instructions* section:

1. Navigate to PeopleTools, Utilities, Use, Message Catalog.
2. Enter *14420* in the Message Set Number field and click Search.
3. Click Find and enter *180* in the Explorer User Prompt dialog box.
4. Click OK.
5. Update the text in the Explanation field.
6. Save your changes.

To move existing information from one page to another or adding another page, change the Application Engine Program called FAAWDNOTIF.

Note: It is useful to know the page names in Application Designer. The first page of the FE FAN is called FA_AWD_NOTIF_LTR1.

Setting Up and Accessing a Financial Aid Shopping Sheet

This section discusses how to:

- Set up group options.
- Set up institution information.
- Set up budget mapping.
- Set up award mapping.
- Assign Shopping Sheet groups.
- View Shopping Sheets.

Understanding the Financial Aid Shopping Sheet

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Changes to this section are based on the 2017-2018 Financial Aid Shopping Sheet template released by the Department of Education on November 14, 2016.

The Financial Aid Shopping Sheet is a consumer tool created by the United States Department of Education (ED). The Shopping Sheet's format is prescribed by an ED-issued template, which this feature of the system uses without modification. The Shopping Sheet is designed to provide a standardized award letter allowing students to easily compare financial aid packages and make informed decisions on where to attend college. According to ED, the Shopping Sheet can be used with or in lieu of a financial aid award letter.

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Within the system, you setup and assign students to a Shopping Sheet Group. The exact number of Shopping Sheet Groups you create is based on your school's needs and setup. Some school's may only require one group per aid year while others may need several. The pages used for setting up Shopping Sheet Groups control what institution and student data is used when the Shopping Sheet is generated for the student. Once your Shopping Sheet Groups are created, you assign them to the appropriate population of students. Assignment can be performed manually for one student at a time on the Packaging Status Summary page or in batch using Population Update. Once assigned, students have access to their Shopping Sheet in Financial Aid Self Service. Access to the Shopping Sheet can be revoked by removing the student from the Shopping Sheet Group which can be done manually or in batch.

Pages Used for Financial Aid Shopping Sheet

Page Name	***Definition Name***	***Navigation***	***Usage***
Group Options	SFA_SS_SETUP	Set Up SACR, Product Related, Financial Aid, Shopping Sheet Setup, Group Options tab	Select Shopping Sheet Group attributes.
Institution Information	SFA_SS_SETUP2	Set Up SACR, Product Related, Financial Aid, Shopping Sheet Setup, Institution Information tab	Enter institution data and metrics.
Budget Mapping	SFA_SS_SETUP_COA	Set Up SACR, Product Related, Financial Aid, Shopping Sheet Setup, Budget Mapping	Map Shopping Sheet Cost Groups to Budget Item Categories.
Award Mapping	SFA_SS_SETUP_AWD	Set Up SACR, Product Related, Financial Aid, Shopping Sheet Setup, Award Mapping	Map Shopping Sheet Award Groups to Fin Aid Type, Source, and Federal ID.

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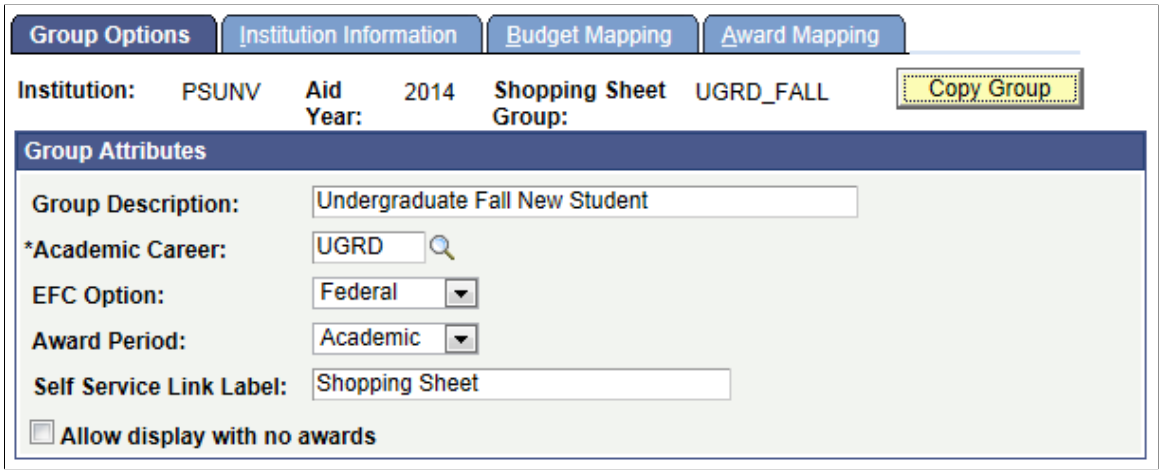
Setting Up Group Options

Access the Shopping Sheet Setup Group Options page (Setup SACR, Product Related, Financial Aid, Shopping Sheet Setup, Group Options tab).

Image: Group Options page

This example illustrates the fields and controls on the Group Options page. You can find definitions for the fields and controls later on this page.



Copy Group — Click this button to open the Shopping Sheet Group Copy window. You can use this window to copy existing Shopping Sheet Groups for modification and then saving as a new Shopping Sheet Group.

Group Description — Enter a description for this Shopping Sheet Group code.

Academic Career — Select a career to associate to the shopping sheet group. This value is used when retrieving budget and award information.

Award Period — Select an award period to associate to the shopping sheet group. This value is used when retrieving budget and award information.

If you select “Both”, data from both the ‘Academic’ and ‘Non Standard’ Award Periods are included on one Shopping Sheet.

EFC Option — Select which EFC to display on the Shopping Sheet.

- *Federal* – Uses the Prorated EFC (PRORATED_EFC) based on Federal Methodology.
- *Institutional* – Uses the Institutional EFC (INST_EFC) based on Institutional Methodology.

Self Service Link Label — Enter the text you want to display as the Financial Aid Self Service link to the Shopping Sheet. “Shopping Sheet” is the default text.

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Allow display with no awards

Select this check box if you want the Shopping Sheet link to be available to students in Self Service even if the student doesn't have any qualifying awards for the Institution and Aid Year.

Note: This option helps institutions comply with the expectations within Principles of Excellence in Executive Order 13607 which states that educational institutions provide meaningful information to service members, veterans, spouses, and other family members about the financial cost (budget) and quality (institutional metrics) of educational institutions. Although the student may not have any awards, it is assumed that they would have a cost of attendance budget assigned which is used to create the Shopping Sheet based on the Budget Mapping options.

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Setting Up Institution Information

Access the Shopping Sheet Setup Institution Information page (Set Up SACR, Product Related, Financial Aid, Shopping Sheet Setup, Institution Information tab).

Image: Institution Information page (1 of 2)

This example illustrates the fields and controls on the Institution Information page (1 of 2). You can find definitions for the fields and controls later on this page.

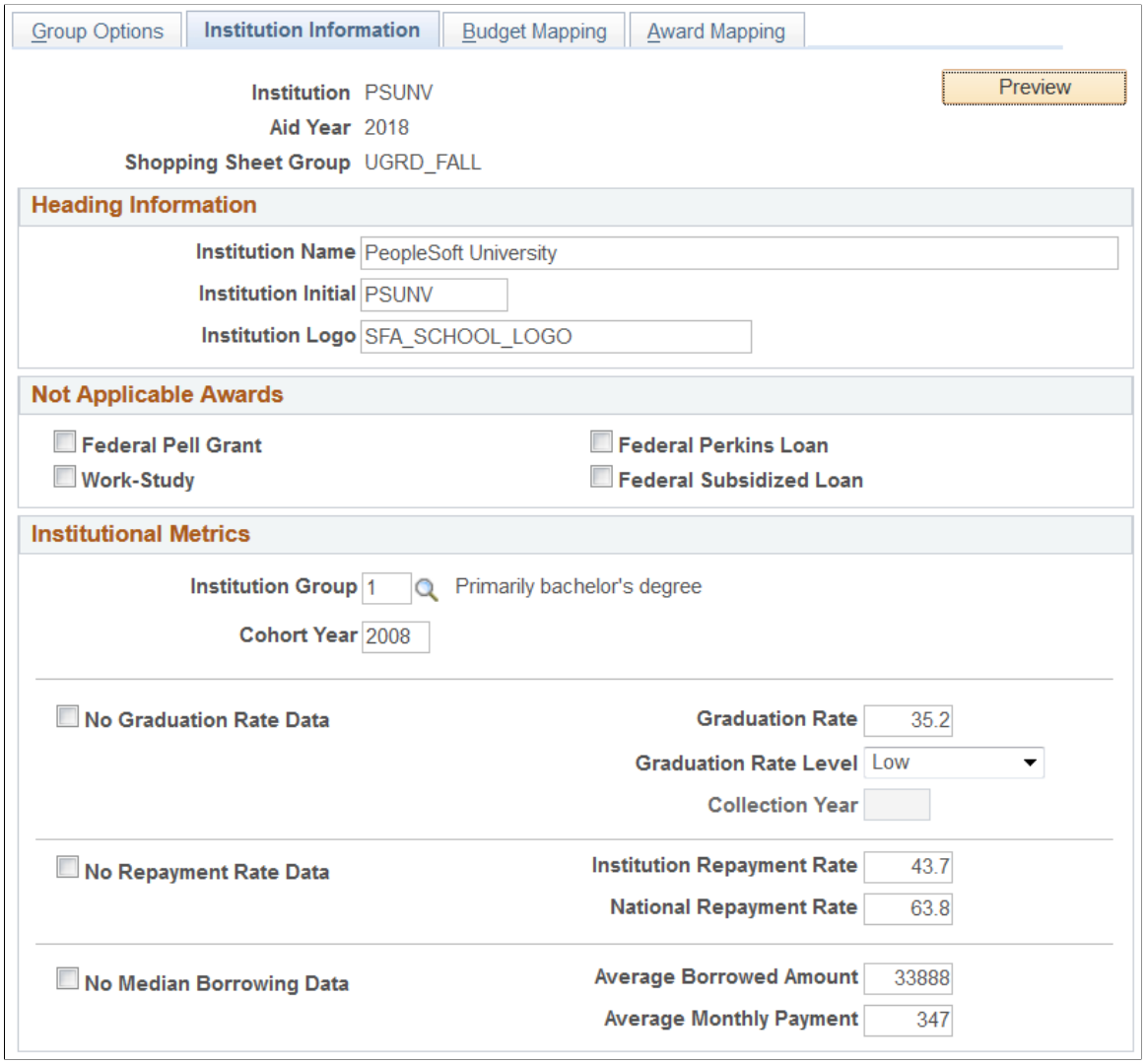

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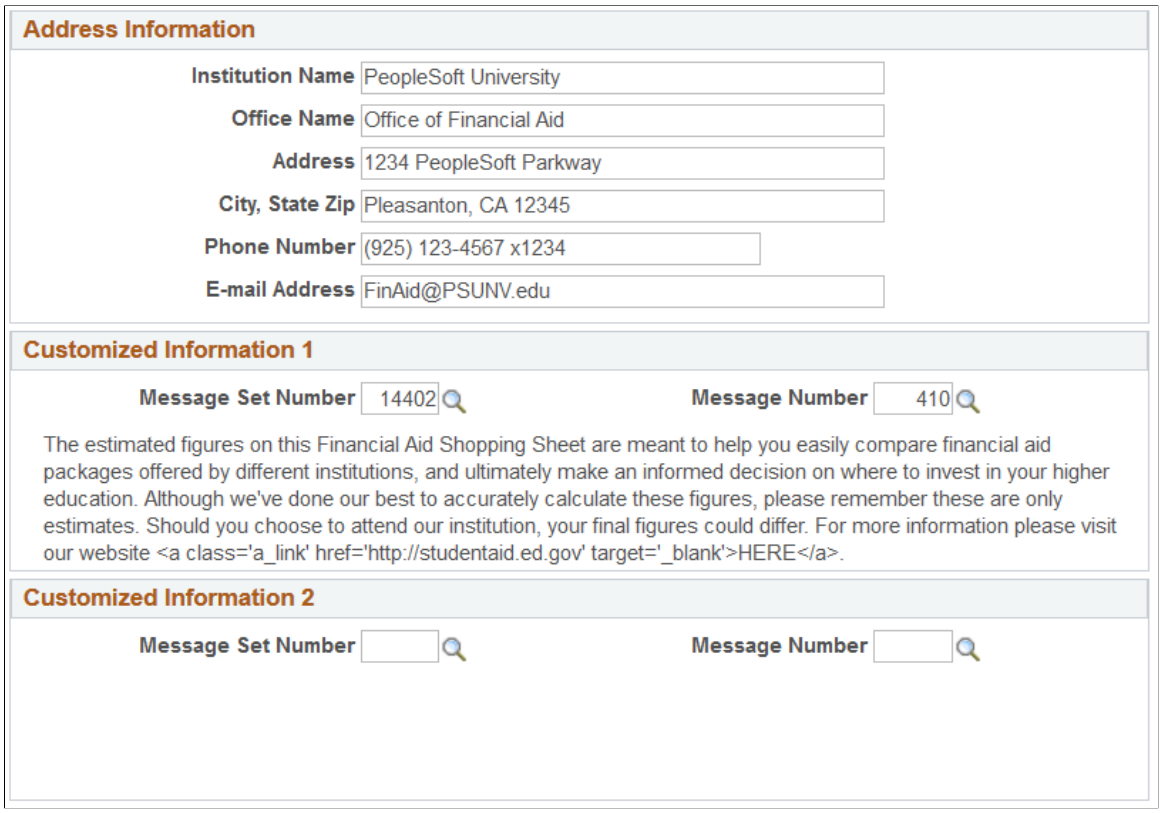
Image: Institution Information page (2 of 2)

This example illustrates the fields and controls on the Institution Information page (2 of 2). You can find definitions for the fields and controls later on this page.



Preview

After entering data on this page, click this button to view how your school's data would be rendered on the Shopping Sheet. The Preview page is used to verify the display of your institution's data only. Student specific fields display generic values. Every setup value on this page is pulled in during Preview.

Note: You may need modify data elements if they extend beyond their designated line.

Header Information

Institution Name

Enter the name of the Institution as you want it to appear in the header of the Shopping Sheet.

Institution Initial

Enter a short descriptor for the institution (for example, PSUNV). This data is displayed in the header and Median Borrowing sections of the Shopping Sheet.

Institution Logo

Enter the object name of your institution's logo. The logo you want to use must be imported into your database as an image file measuring approximately 65 by 65 pixels. You may need to

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consult your technical staff on making the object available for this setup.

Not Applicable Awards

Select the Shopping Sheet Award Group(s) for which you wish to display “N/A”. ED states that you cannot remove award groups from displaying on the Shopping Sheet but can display N/A for certain award groups when necessary.

For example, you may use these options if the population to which you are assigning the Shopping Sheet isn't eligible for this type of award or if your school doesn't participate in this particular award program. Displaying “N/A” instead of “$0” may help avoid confusion.

Note: If you choose to display “N/A” for an Award Group, you may want to explain why the awards are not available in the Customized Information Message.

Institutional Metrics

Enter the values provided by ED on the Institution Metric Data spreadsheet. The values entered here control how the data and graphs are rendered within the Institutional Metrics section on the right side of the Shopping Sheet.

Institution Group

Enter the Institution Group value as provided by ED. The value entered here determines what message is displayed in the Graduation Rate section on the Shopping Sheet. Valid values are:

- *1 - Primarily bachelor’s degree granting*
- *2 - Primarily associate’s degree granting*
- *3 - Primarily certificate granting*
- *4 - Primarily graduate degree granting*
- *5 - Primarily non-degree granting*

Cohort Year

Bundle 44

Updated description.

Enter your Cohort Year value as provided by ED. This value is used in the message of the Graduation Rate section when a -2, -3 or -4 Graduation Rate is indicated.

No Graduation Rate Data

Select this check box if your Institution Graduation Rate value provided by ED is blank.

Note: Do not select this check box if your Graduation Rate is zero (0). Zero is a valid value and should be entered in the Graduation Rate field.

If this check box is selected:

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- The Graduation Rate and Graduation Rate Level fields on this page are not available for setup.
- The Graduation Rate section of the Shopping Sheet indicates that no data is available.

Graduation Rate

Bundle 44

Updated definition. For the 2017–2018 Aid Year, -5 is a new value.

Enter your Graduation Rate value as provided by ED. ED has also issued four valid negative values (-2, -3, -4, and -5). If a negative value is entered here:

- The Graduation Rate Level field on this page is not available.
- The message/bar graph in the Graduation Rate section of the Shopping Sheet is changed to indicate no data is available.

Graduation Rate Level

Select the correct Graduation Rate Level based on the values provided by ED.

Collection Year

Bundle 44

New field for the 2017–2018 Aid Year.

This field is only available if the Graduation Rate is -5. Enter your Collection Year value as provided by ED. This value is used in the message of the Graduation Rate section when a -5 graduation rate is indicated.

No Loan Default Data

Bundle 44

Added a new note to description.

Select this check box if your Institution Loan Default Rate value provided by ED is blank. Do *not* select this check box if your Loan Default Rate is zero (0). Zero is a valid value and should be entered in the Institution Loan Default Rate field. If this check box is selected:

- The Institution Loan Default Rate and National Loan Default Rate fields on this page are not available.
- The message/graph in the Loan Default Rate section of the Shopping Sheet are changed to indicate that no data is available.

Note: No Loan Default Data, Institution Loan Default Rate, and Institution Loan Default Rate are only applicable to 2016–2017 and prior Aid Years.

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Institution Loan Default Rate

Enter your Institution Loan Default Rate value as provided by ED.

National Loan Default Rate

Enter the National Loan Default Rate value as provided by ED.

No Repayment Rate Data

Bundle 44

New field for the 2017–2018 Aid Year.

Select this check box if your Institution Repayment Rate value provided by ED is blank. Do not select this check box if your Repayment Rate is zero (0). Zero is a valid value and should be entered in the Institution Repayment Rate field.

If this check box is selected:

- The Institution Repayment Rate field on this page are not available. The National Repayment Rate field is still available and should be populated.
- The message/graph in the Repayment Rate section of the Shopping Sheet are changed to indicate that no data is available.

Note: The No Repayment Rate Data, Institution Repayment Rate, and National Repayment Rate are only applicable to the 2017–2018 Air Year and forward.

Institution Repayment Rate

Bundle 44

New field for the 2017–2018 Aid Year.

Enter your Institution Repayment Rate value as provided by ED.

National Repayment Rate

Bundle 44

New field for the 2017–2018 Aid Year.

Enter your National Repayment Rate value as provided by ED.

No Median Borrowing Data

Select this check box if your Average Borrowed Amount value provided by ED is blank. If this check box is selected:

- The Average Borrowed Amount and Average Monthly Payment fields on this page are not available.
- The message in the Median Borrowing section of the Shopping Sheet is changed to indicate that no data is available.

Average Borrowed Amount

Enter your Average Borrowed Amount value as provided by ED.

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Average Monthly Payment Enter your Average Monthly Payment value as provided by ED. ED provides a value with 2 decimal places, but has indicated that rounding to the nearest whole dollar is acceptable.

Address Information

Enter your institution's address and contact information.

Note: The fields in this section allow for large entries which can distort the Shopping Sheet appearance. Click the Preview button at the top of the page to ensure your school's data displays correctly.

Customized Information Messages

Use the Message Catalog to create custom messages to display.

Customized Message 1 displays at the bottom of the main Shopping Sheet page. A default message with Message Set Number 14402 and Message Number 410 is delivered with the product code. The default message includes an example of how you can include links in your custom message to lead students to additional information.

Customized Message 2 displays below the Glossary on the Shopping Sheet. Oracle does not provide any default message for this. If no Message Set Number/Message Number is entered, this section is suppressed when the Shopping Sheet is generated.

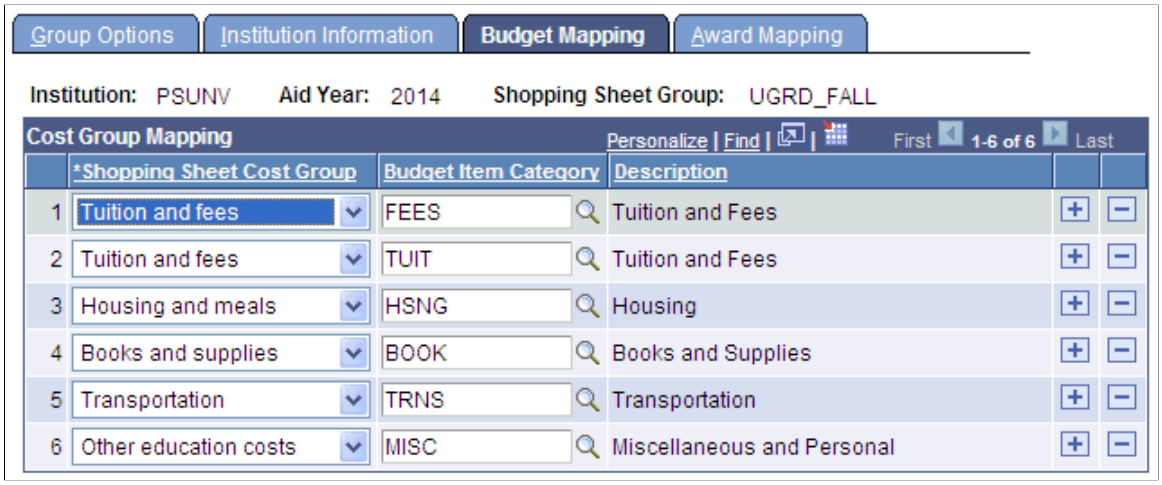
See *PeopleTools: System and Server Administration*, Using PeopleTools Utilities, Using Administration Utilities, Message Catalog.

Setting Up Budget Mapping

Access the Shopping Sheet Setup page (Set Up SACR, Product Related, Financial Aid, Shopping Sheet Setup, Budget Mapping).

Image: Budget Mapping page

This example illustrates the fields and controls on the Budget Mapping page. You can find definitions for the fields and controls later on this page.



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Map your Budget Item Categories to the appropriate Shopping Sheet Cost Group. You can map multiple Budget Item Categories to a single Shopping Sheet Cost Group, but you can only use a Budget Item Category once.

When a Shopping Sheet is generated for a student, the system reviews the student's current budget data for the given Institution, Aid Year, Academic Career, Award Period, and Budget Item Category. Any matching values are used to calculate totals displayed in each Shopping Sheet Cost Group.

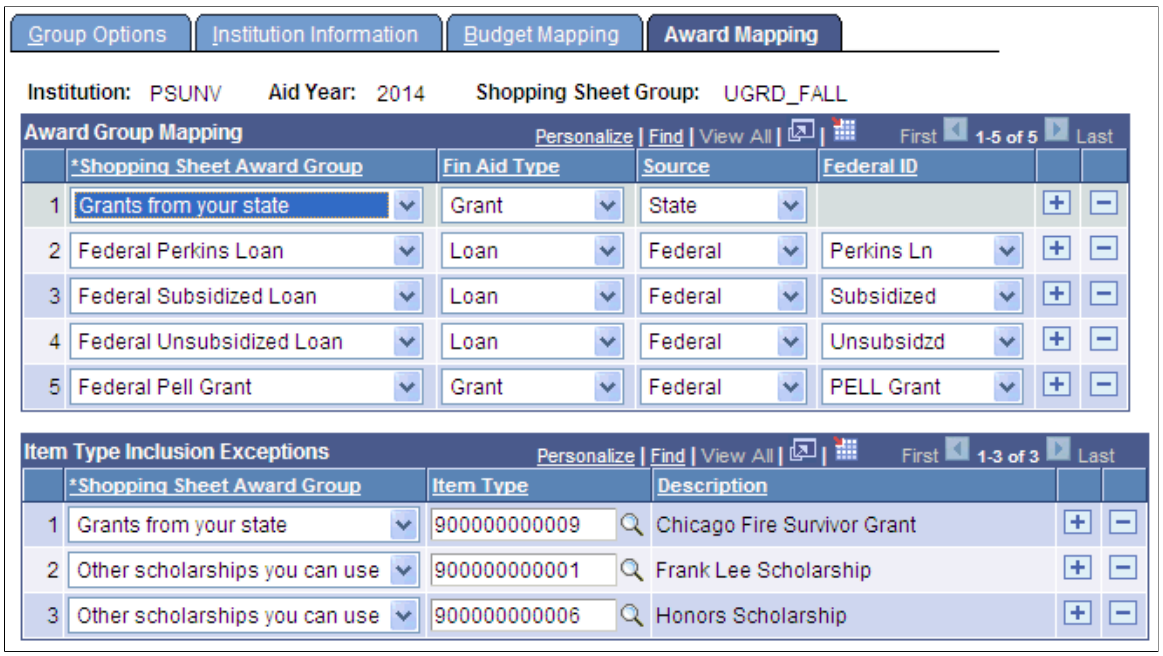
Note: If your students have access to Cost of Education information in Financial Aid Self Service, you should attempt to map the Shopping Sheet Cost Groups so they match the Cost of Attendance Self Service information.

Setting Up Award Mapping

Access the Shopping Sheet Setup page (Set Up SACR, Product Related, Financial Aid, Shopping Sheet Setup, Award Mapping).

Image: Award Mapping page

This example illustrates the fields and controls on the Award Mapping page. You can find definitions for the fields and controls later on this page.



Note: To match the existing self service functionality, only those Financial Aid Item Types having a Print Option of “P” (Print) are used to calculate the Shopping Sheet Award Group totals. Although the setup page allows you to map individual Item Types that have a Print Option *not* equal to “P”, these Item Types are ignored when calculating the Shopping Sheet Award totals.

Award Group Mapping

Map your Fin Aid Type, Source, and Federal ID (when applicable) to the appropriate Shopping Sheet Award Groups. You can map multiple Fin Aid Type, Source, and Federal ID combinations to a single Shopping Sheet Award Group.

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When a Shopping Sheet is generated for a student, the system reviews the student's current award data for the given Institution, Aid Year, Academic Career, Award Period, Fin Aid Type, Source, and Federal ID. Any matching values are used to calculate totals displayed in each Shopping Sheet Award Group.

Note: If your students have access to Award information in Financial Aid Self Service, you should attempt to map the Shopping Sheet Award Groups so they match the Award Self Service information.

Item Type Inclusion Exceptions

Use this setup to include additional Item Types in Shopping Sheet Award Groups that are not included using the Award Group Mapping.

Select a Shopping Sheet Award Group in which you want to include a specific Item Type and then choose the Item Type you want to include. You can include multiple Item Types in the same Shopping Sheet Award Group, but you can only include an Item Type once across all Shopping Sheet Award Groups.

Assigning Shopping Sheet Groups

The availability of the Shopping Sheet link within Self Service is controlled by the student's Shopping Sheet Group. The Shopping Sheet Group for a student can be assigned and viewed on the Packaging Status Summary page. If a student is assigned a Shopping Sheet Group, has Award Detail security for Self Service, and has been awarded, the Shopping Sheet link displays in Self Service.

Shopping Sheet Groups can also be assigned in batch using the Population Update process. When using Population Update, use the Record (Table) Name of STDNT_AID_ATRBT and field name of “Shopping Sheet Group”.

You may want to remove a student's access to his or her Shopping Sheet, for example, when he or she has accepted or declined awards. To remove a student's access to his or her Shopping Sheet, go to the Packaging Status Summary page, make the Shopping Sheet Group field equal to blank, and save. You may also use the Population Update process to set the Shopping Sheet Group to blank.

See Reviewing the Packaging Status Summary Page.

See "Running the Population Update Process" (PeopleSoft Campus Solutions 9.2: Campus Community).

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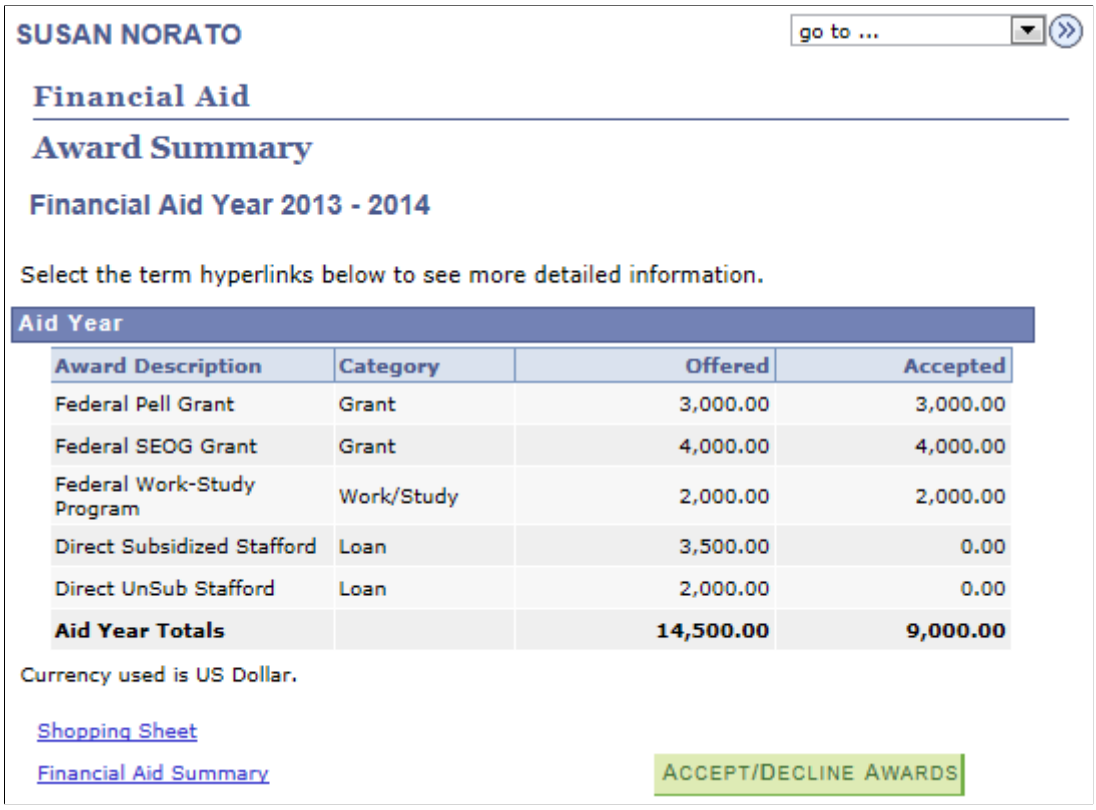
Viewing the Financial Aid Shopping Sheet

Access the Financial Aid Self Service Award Summary page (Campus Community, Student Services Center, View Financial Aid link, 20XX (award year) link, Shopping Sheet link).

Image: Self Service with Shopping Sheet Link Example

This example illustrates the Self Service with Shopping Sheet Link Example.



The Shopping Sheet link is available to students on the Financial Aid Award Summary page in Financial Aid Self Service. Display of the Financial Aid Award Summary page is controlled by the Financial Aid Self Service Inquiry Options. On the Inquiry Options page in the Display Data group box, the Award Detail check box must be selected for students to have access to the Financial Aid Award Summary page, and, therefore, their Shopping Sheets. The Shopping Sheet link is displayed whether you choose to display Award Detail by Aid Year or Award Period.

Note: The Shopping Sheet link displays in this same location if you choose the 'Allow display with no awards' option on the Shopping Sheet setup Group Options page.

Note: Students must have a Shopping Sheet Group assigned to have a Shopping Sheet to link to from Financial Aid Self Service.

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Download Click this button to open a new window and view some of the values from the Shopping Sheet in XML format.

Image: Sample of Shopping Sheet XML Download

This example illustrates the Shopping Sheet XML Download.


```xml
<shopping_sheet>
<costs>
<total_estimated_cost>$21,800</total_estimated_cost>
<tuition_and_fees>$12,000</tuition_and_fees>
<housing_and_meals>$7,000</housing_and_meals>
<books_and_supplies>$600</books_and_supplies>
<transportation>$1,600</transportation>
<other_education_costs>$600</other_education_costs>
</costs>
<grants_and_scholarships>
<total_grants_and_scholarships>$3,000</total_grants_and_scholarships>
<grants_and_scholarships>$0</grants_and_scholarships>
<federal_pell_grant>$3,000</federal_pell_grant>
<grants_from_state>$0</grants_from_state>
<other_scholarships>$0</other_scholarships>
</grants_and_scholarships>
<net_costs>$18,800</net_costs>
<work_options>
<work_study>$N/A</work_study>
</work_options>
<loan_options>
<federal_perkins_loan>$0</federal_perkins_loan>
<federal_direct_subsidized_loan>$3,500</federal_direct_subsidized_loan>
<federal_direct_unsubsidized_loan>$2,000</federal_direct_unsubsidized_loan>
</loan_options>
<other_options>
<family_contribution>$1,715</family_contribution>
</other_options>
</shopping_sheet>
```


See Assigning Shopping Sheet Groups.

See "Understanding Financial Aid Self-Service " (PeopleSoft Campus Solutions 9.2: Self Service).

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