Setting Up Packaging Basics

Understanding Packaging Basics

The items covered in Understanding Packaging Basics are the basic items required for all three modes of packaging (manual, auto, and mass). If your institution is only going to use manual awarding, you only need to perform setup tasks in Understanding Packaging Basics. If you are going to use Auto Packaging or Mass Packaging, you must perform the setup tasks outlined in the Setting Up Auto Packaging and Mass Packaging.

This section lists prerequisites and common elements and discusses:

- Award adjustment reasons.
- Early financial aid offers.
- Awarding versus packaging.
- Financial aid item types.

Related Links

Using Equation Engine in Packaging
Creating Equity Item Type Groups
Creating Related Item Type Groups
Defining Packaging Plans

Prerequisites

Before you begin to set up your institution's financial aid item types and your awarding and packaging rules, you must:

- Set up your institution's installation defaults and other basic elements of the financial aid application processing cycle (such as aid year and valid careers for aid year).
- Set up your item types for financial aid in PeopleSoft Student Financials—you cannot set up your financial aid item types until you have set up item types.
- Establish your financial aid terms.
- Review the concepts of tablesets and setIDs.

If you plan to use admissions rating components as criteria for awarding certain awards, you must:

- Have a list of the rating components used by the admissions office at your institution.

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- Know what the various rating components are used for and what names have been used for them in PeopleSoft Recruiting and Admissions.

  See "Setting up Applicant Evaluation" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

  See "Setting Up Student Response" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions).

Before using the Equation Processor you should know what fields are valid for use in equations and what their names are. A list of valid fields can be found in the "Using the Equation Processor" section. Packaging equations are used for queries and selections from the database and to calculate values.

See Viewing and Editing Equations.

Common Element Used in Packaging Basics

Copy	Used to access a page where you can copy data you have already entered into something new you are creating. For example, you can copy information from one financial aid year to another aid year or from one career to another career within the same aid year.

Award Adjustment Reasons

Financial aid counselors use award adjustment reasons to document why they made a change to the student's award. Award adjustment reasons are available for you to edit, add to, or delete. Award adjustment reasons are required by the Professional Judgement page, and they can also enhance your ability to track patterns in awarding.

Early Financial Aid Offers

If you plan to offer early financial aid awards, and you want to use broad categories of aid instead of specific awards, you must set up these broad categories from which a student could be awarded early financial aid. For instance, you can create categories for scholarships, loans, grants, and work-study. When you actually create an early financial aid offer, you use these categories instead of financial aid item types.

Awarding versus Packaging

A note about terminology: Awarding and packaging are terms that are often used interchangeably. In this book, awarding is used to mean the activity of choosing one financial aid award at a time for a student. Packaging is used to refer to a process in which many awards are given to a student at one time to make a financial aid award package.

Financial Aid Item Types

Financial aid item types are selected item types that your institution has assigned to the funds awarded as financial aid. The item type is used to map the financial aid award transaction to the appropriate general ledger account during the general ledger process. The way item types are classified governs whether they are considered as financial aid item types.

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Setting up your item types for financial aid requires several major steps:

1. Add keywords on the Keywords page to simplify the search for a financial aid item type in a search dialog box.

   Keywords that you might use for your item types include grants, loans, work (for work-study), scholarship, and merit.

   Note: Financial aid and bursar offices should work together to set up your keywords so that a keyword standard can be defined for your institution.

2. Set up the item types used by financial aid in the Item Types component.
3. Set up financial aid item types.
4. Set up fiscal item types to define the amount of spending money for a particular fund.

   Note: Use the same setID for all of your financial aid item types.

Related Links

"Understanding Student Financials General Setup" (PeopleSoft Campus Solutions 9.2: Student Financials)

Defining Packaging Variables

To set up packaging variables, use the Package Rating Components component (PKG_RTNGCMP_GROUP).

This section provides an overview of packaging variables and discusses how to:

- Define package rating components.
- Enter institution-specific variables.
- Populate rating components in batch.
- Populate rating components manually.
- Enter additional packaging variables.

Understanding Packaging Variables

Many fields are already available in Financial Aid, but the Packaging Variables component enables you to create additional institutionally defined variable fields for use in the Packaging process. You can define character variables, numeric variables, and yes or no flags. Package rating components are also included as packaging variables.

Use the package rating components that you define here to define specific student populations for packaging. For example, you may want to select all students with total SAT I scores over 1000 for a particular award. This could be done by assigning the SAT I criteria used by Recruiting and Admissions to one of the package rating components. Then, when defining your population of students for packaging,

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you would include the package rating component that referred to SAT I score in your selection formula. Package rating components are defined for each career. You must have a different group of package rating components for each career that utilizes package rating components in packaging plans. Enter the admissions rating components and GPA types in any order, but keep track of which items you enter for each package rating component for future reference.

The Rating Component 1 and 2 pages in the Packaging Variables component enable you to enter or to view package rating component information. Package rating components correspond to admissions rating components. You can enter package rating component information manually or using a background process.

To enter package rating component information manually:

1. Select the admissions rating components to use as package rating components in the Package Rating Components component.
2. Enter the student's values on the Rating Components 1 page or Rating Components 2 page.

To enter package rating component information in batch:

1. Select the admissions rating components to use as package rating components in the Package Rating Components component.
2. Run the Assign Packaging Rtng Component (assign packaging rating component) process (FAPKGCMP) on the Assign Packaging Rating Components page.
3. Review values returned by the process on the Rating Components 1 page or Rating Components 2 page.

You can change the field names on these pages by using the Application Designer. For example, if you use a character variable to represent a student's county of residence, you can change Var Char 1 to County. If you do not change the field names, make a note of what each variable value represents for future reference.

Pages Used to Define Packaging Variables

Page Name	***Definition Name***	***Navigation***	***Usage***
Package Rating Components 1 and Package Rating Components 2	PKG_RTNGCMP_TABLE1 PKG_RTNGCMP_TABLE2	Set Up SACR, Product Related, Financial Aid, Awards, Package Rating Components, Package Rating Components 1 and Packaging Rating Components 2	Define package rating components. Select the admissions rating components and the GPA types that you want to be available for packaging equations as package rating components.
User Variables	STDNT_VAR_CHAR	Financial Aid, Awards, Award Processing, Assign Packaging Variables, User Variables	Enter institution-specific variable values for a student.

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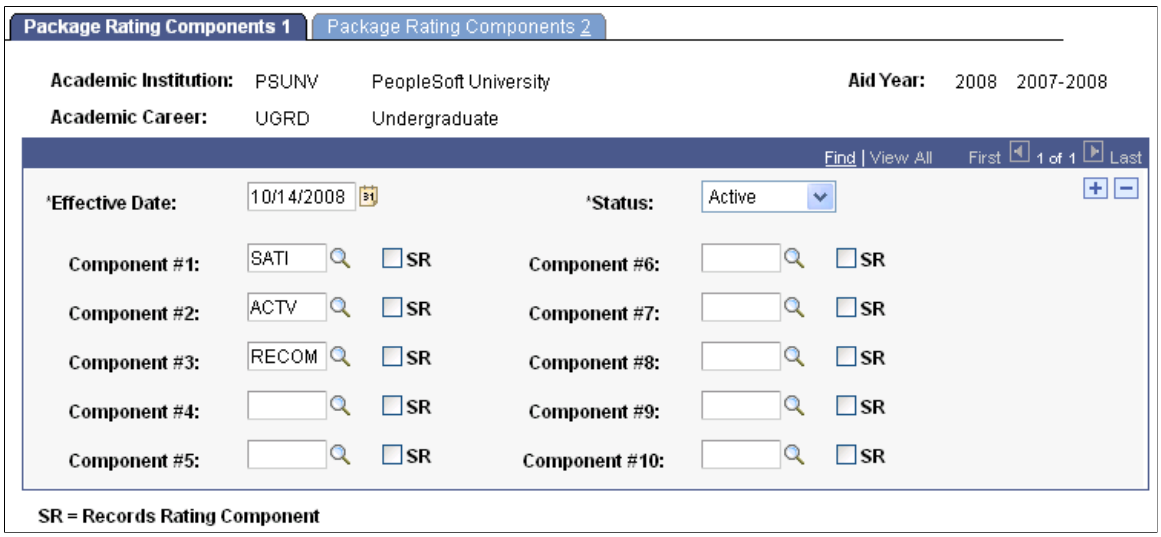
Page Name	Definition Name	Navigation	Usage
Assign Packaging Rating Components	RUNCTL_FA_PKG_RC	Financial Aid, Awards, Award Processing, Assign Packaging Ratings, Assign Packaging Rating Components	Populate rating components in batch. Move selected admissions rating components and GPA types and their associated values to the Package Rating Components 1 and 2 pages.
Rating Component 1 and Rating Component 2	STDNT_VAR_CMP1_7 STDNT_VAR_CMP8_14	Financial Aid, Awards, Award Processing, Assign Packaging Variables, Rating Component	Populate rating components manually. View or manually enter the student's particular value associated with each package rating component.
Additional Variables	STDNT_VAR_CA	Financial Aid, Awards, Award Processing, Assign Packaging Variables, Additional Variables	Enter values for packaging variables setup using the Common Attribute Framework.

Defining Package Rating Components

Access the Package Rating Components 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Package Rating Components, Package Rating Components 1).

Image: Package Rating Components 1 page

This example illustrates the fields and controls on the Package Rating Components 1 page. You can find definitions for the fields and controls later on this page.



Component #1-20

Enter the admissions rating component or GPA type that you want to use as a package rating component. You can enter values in any fields in any order.

Note: To select a GPA type, you must first select the SR check box next to that field.

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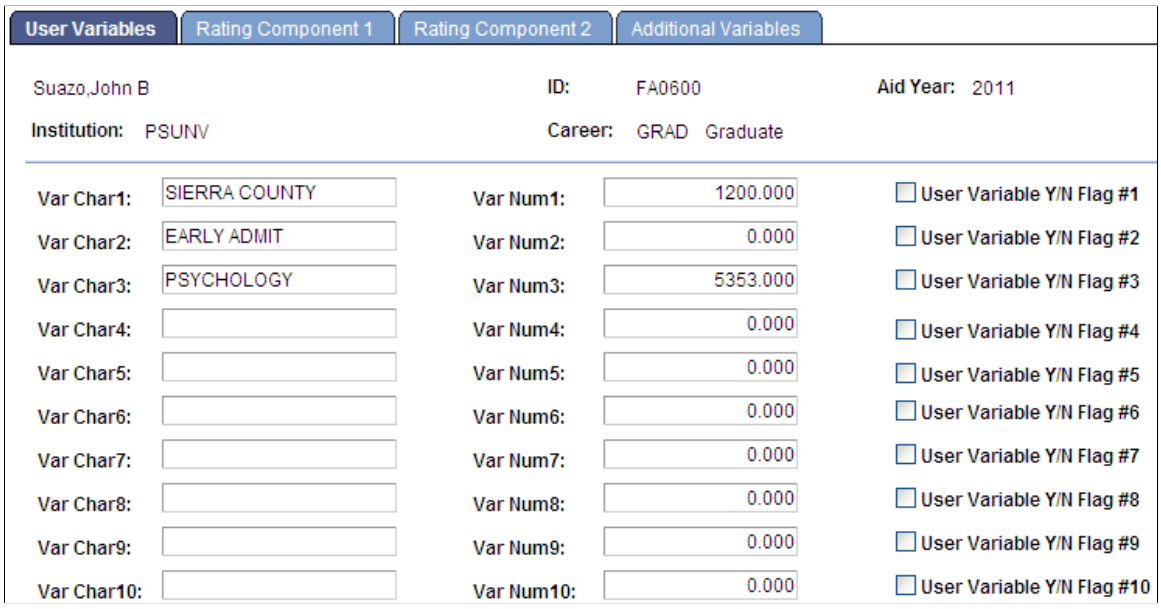
SR (student records) Determines what values you can select in the Component field. Select to have only GPA types available for selection.

Entering Institution-Specific Variables

Access the User Variables page (Financial Aid, Awards, Award Processing, Assign Packaging Variables, User Variables).

Image: User Variables page

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



Var Char 1-10 (character variable) Enter any alphabetic characters such as words, phrases, or symbols.

For example, you can use a character variable to define a particular student interest, such as an interest in psychology, that helps determine eligibility for a scholarship, such as a psychology merit scholarship.

Var Num 1-10 (numeric variable) Enter numeric variables to define anything that has a numeric value such as percentages, integers, or dollar amounts. You can use numeric variables to define formulated numeric values such as test scores plus GPA or a raw index of a student's financial need. If you do not enter a value in numeric variable field, the zeros remain in the field. The format for this field is numeric.

User Variable Y/N Flag #1-10 Yes/No Flags can be defined for any variable field with a Y or N value. An example of when you might use a Yes/No Flag is the Ability To Benefit test. Select the check box to indicate yes. Clear the check box to indicate no. The value that you enter should be true for the student whose name appears in the top portion of the page.

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Populating Rating Components in Batch

Access the Assign Packaging Rating Components page (Financial Aid, Awards, Award Processing, Assign Packaging Ratings, Assign Packaging Rating Components).

Image: Assign Packaging Rating Components page

This example illustrates the fields and controls on the Assign Packaging Rating Components page. You can find definitions for the fields and controls later on this page.

Process Components From

Select the criteria that you want the system to use when selecting students for processing.

Admissions Rating Components Select this option to use admissions criteria for selecting students. Use this option if you want the process to select data from the admissions evaluation area. If you select this option, you cannot enter any criteria in the Records Criteria group box.

Stdnt Records Special GPA (student records special grade point average) Select this option to enter Student Records criteria for selecting students. Use this option if you want the process to select data from the Student Special GPA page in Student Records. If you select this option, you cannot enter any criteria in the Admissions Criteria group box.

Both Select this option to enter both admissions and student records criteria for selecting students. Use this option to have process select data from both admissions and special GPA data.

Other Page Elements

Overwrite Select to overwrite the previous values entered in the Packaging Variables Rating Components page for the students included in this batch.

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Admissions Criteria

Enter the Recruiting and Admissions criteria that the system should use to select students for processing.

Admit Term	Students who were admitted during the selected term are included in the process.
Stdnt Lvl (student level)	Students whose student level is equal to or higher than the selected value are included in the process. The student level corresponds to where the student is in the admissions process or indicates that they are an accepted or continuing student.
Evaluation Status	Students whose evaluation status matches the selected value are included in the process. The student's evaluation status is related to where a student is in the admissions process. You can select: *CM* (committee evaluation in progress), *FN* (final), *HD* (on hold), or *IP* (in progress).
Evaluation Code	Students whose evaluation code matches the selected value are included in the process.

Records Criteria

Enter the Student Records criteria that the system should use to select students for processing.

Term - Student FA Term	Select the financial aid term that should be used to select the student's career, academic program, and academic plan for comparison against the match criteria.
Term - Student Spcl GPA (term - student special GPA)	Select the term from which the process should select the GPA types and the corresponding GPA value.
Match Level	Select Academic Career, Academic Program, Academic Plan or Academic Sub-Plan as the matching criteria.
Run	Run the Assign Packaging Rtng Component (assign packaging rating component) process (FAPKGCMP) when you are ready to process students. Run this process periodically so that when rating components are used, the values are current.

Related Links

"Setting up Applicant Evaluation" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

"Setting Up Student Response" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

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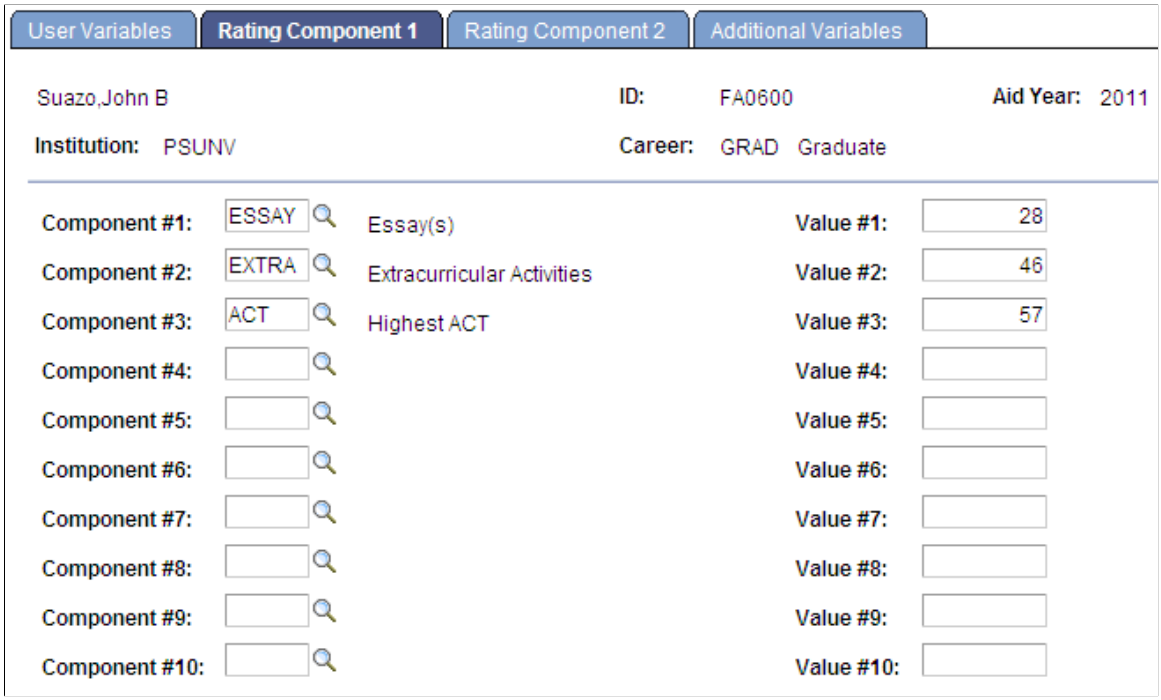
Populating Rating Components Manually

Access the Rating Component 1 page ((Financial Aid, Awards, Award Processing, Assign Packaging Variables, Rating Component).

Image: Rating Component 1 page

This example illustrates the fields and controls on the Rating Component 1 page. You can find definitions for the fields and controls later on this page.



The package rating components are divided over two pages, Rating Component 1 page and Rating Component 2 page, with ten components per page. Package rating components are mapped to Recruiting and Admissions or Student Records criteria on the Package Rating Components page. If you are populating the package rating components in batch, run the Assign Packaging Rtng Component (assign packaging rating component) process (FAPKGCMP) periodically, so that when you use the package rating components the values are current.

Component # (component number

If you have run the Assign Packaging Rating Component (FAPKGCMP) process, the package rating components set up on the Package Rating Components 1 and 2 pages are populated in this field and the student's value for that component is displayed in the corresponding Value field. Whether or not you have run the above process, you can select an admissions rating component and enter the corresponding value manually.

Value # (value number)

A numeric field that represents the student's value for the corresponding package rating component. If you have run the Assign Packaging Rtng Component (FAPKGCMP) process, this field is automatically populated but you can change the value. If you are entering package rating components manually, enter the correct value.

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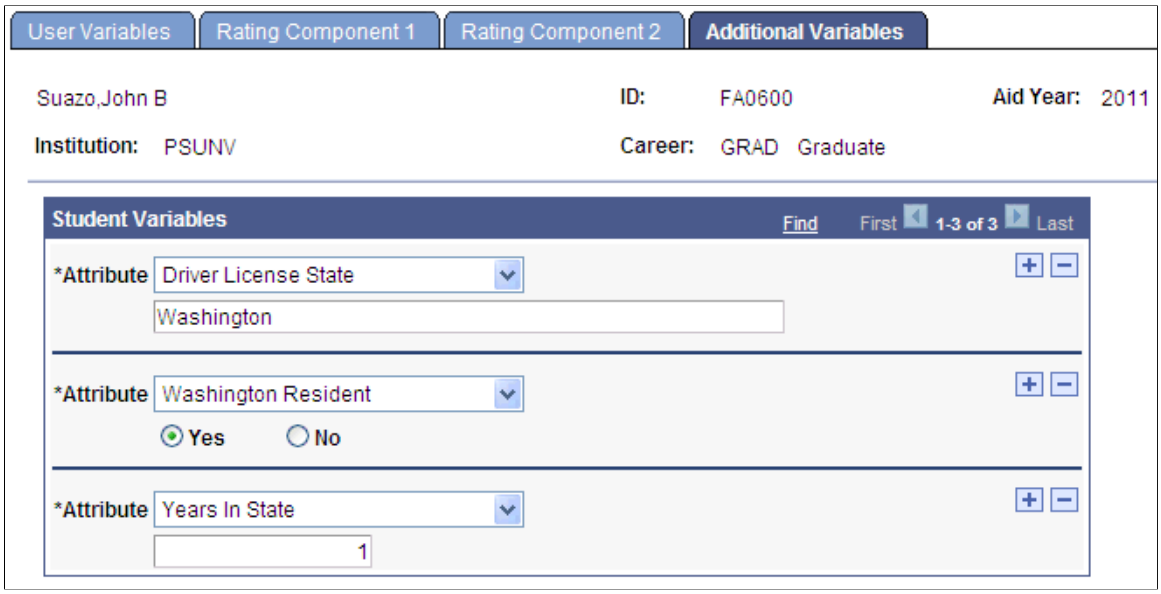
Entering Additional Packaging Variables

Access the Additional Variables page (Financial Aid, Awards, Award Processing, Assign Packaging Variables, Additional Variables).

Image: Additional Variables page

This example illustrates the fields and controls on the Additional Variables page.



Enter values for packaging variables setup using the Common Attribute Framework.

Note: To be available on this page, *Attributes* must be associated with the STDNT_PKG_VAR record in the Common Attribute setup.

See "Associating a Common Attribute to a Record" (PeopleSoft Campus Solutions 9.2: Campus Community).

Defining Disbursement Plans and Split Codes

To set up disbursement plans and split codes, use the Disbursement Plan Table component (DISBURSE_PLAN_TBL), the Disbursement ID Table component (DISBURSE_ID_TBL), the Disbursement Split Code component (DISB_SPLIT_CD), and the Disbursement Split Cd Formula component (DISB_ID_SPLIT).

This section provides an overview of disbursement plans and split codes and discusses how to:

- Create disbursement plans.
- Set up disbursement IDs.
- Set up disbursement split codes.
- Define split code formulas.

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Understanding Disbursement Plans and Split Codes

Financial aid funds are awarded to students based on an annual or aid year amount, but you would rarely deliver these funds to students in one lump sum, unless the student is in attendance for only one term. Disbursement plans specify when and how much of a particular award to disburse, by term, to the student's account in Student Financials. For example, if your institution has two terms, you may disburse awards once per term or you may disburse multiple times within a term. Disbursement plans are defined by career, so if you have a law school on semesters and your undergraduates are on quarters, you can define different disbursement plans for each career.

Before you begin, you must gather all the possible target disbursement dates for the different student populations that your institution supports. For example, students enrolled in the law school begin classes 10 days prior to all other academic programs. You must also have a good understanding of any special disbursement patterns a fund may have. For example, you may have an institutional fund that is disbursed in one lump sum for the year or perhaps disbursed on a monthly basis.

Pages Used to Define Disbursement Plans and Split Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Disbursement Plan	DISBURSE_PLAN_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Plan Table, Disbursement Plan	Create disbursement plans, by aid year, that you offer for each career at your institution. Disbursement plans are high level structural schemes possible within an academic career.
Copy Disbursement Plan Data	DISB_PLAN_COPY	Click the Copy button on the Disbursement Plan page.	Copy the information on the Disbursement Plan page from one combination of aid year, career, and academic institution to another.
Disbursement ID	DISBURSE_ID_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement ID Table, Disbursement ID	Set up disbursement IDs and terms for each disbursement that should be associated with the disbursement plan. Disbursement IDs identify all the possible target disbursement dates within a specific period.
Copy Disbursement ID Data	DISB_ID_COPY	Click the Copy button on the Disbursement ID page.	Copy the information on the Disbursement ID page from one combination of academic institution, aid year, academic career, and disbursement plan to another.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Disbursement Split Code	DISB_SPLIT_CD	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Codes, Disbursement Split Code	Set up disbursement split codes, or various disbursement patterns for this disbursement plan. Disbursement split codes are created to provide a label to the various patterns of disbursement IDs. For example, equal disbursement across terms, or fall only disbursement.
Copy Split Code Data	SPLIT_CODE_COPY	Click the Copy button on the Disbursement Split Code page.	Copy the information on the Disbursement Split Code page from one combination of academic institution, aid year, and academic career to another.
Disbursement Split Formula	DISB_ID_SPLIT	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Cd Formula, Disbursement Split Formula	Define split code formulas, or disbursement percentages for the split codes you created based on the disbursement split code descriptions—this setup provides the specific percentage distribution to each disbursement ID created within a disbursement plan.
Copy Split Code Formulas	ID_SPLIT_COPY	Click the Copy button on the Disbursement Split Formula page.	Copy information on the Disbursement Split Formula page from one combination of academic institution, aid year, and academic career to another.

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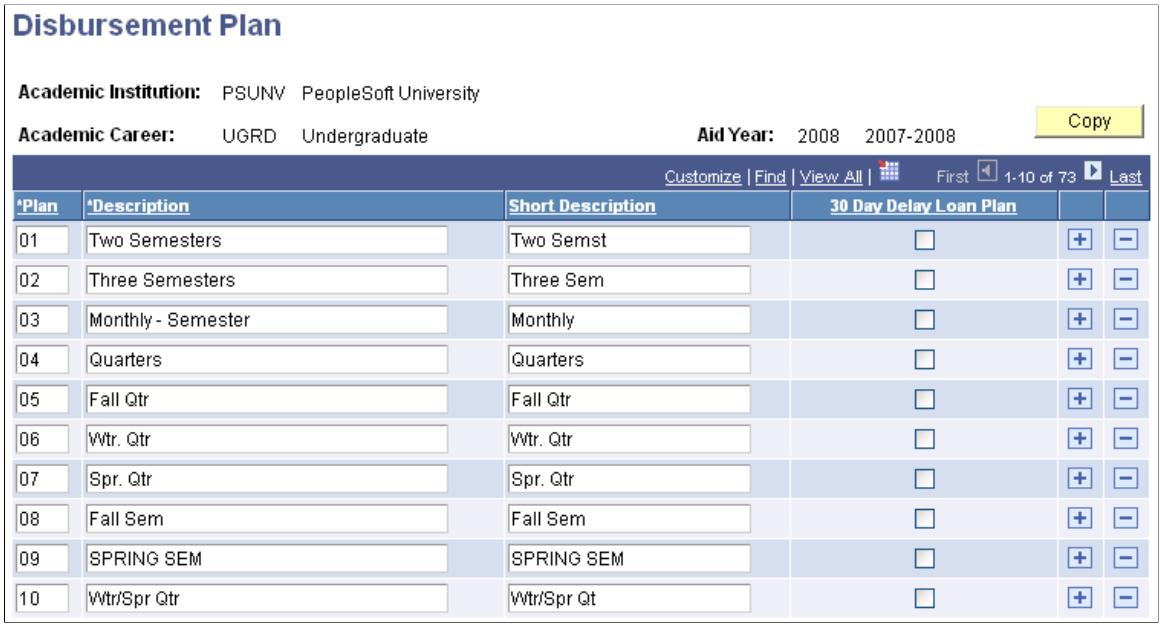
Creating Disbursement Plans

Access the Disbursement Plan page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Plan Table, Disbursement Plan).

Image: Disbursement Plan page

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



Disbursement plans must account for all possible patterns that you use to disburse money to a student. For example, if your institution supports quarter-based terms, you might have a plan for all three quarters, fall and spring quarter, fall and winter quarter, winter and spring quarter, and then a plan for each quarter alone. That way, no matter what the student's attendance pattern is, you have a disbursement plan defined to match that pattern. Define at least one disbursement plan for each career. For clarity, you may want to make your disbursement plan code or value consistent across careers. Your disbursement plan defines the pattern for disbursement of financial aid funds. For example, at a semester-based institution, disbursements can occur in the fall semester only, the spring semester only, or both semesters. Each of these patterns would be defined as a separate disbursement plan.

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Note: Special consideration is required for loan item types that are processed using the Campus Solution Loan Processing module. When a loan is originated, the scheduled disbursement amounts and associated disbursement ID are carried forward to the Campus Solutions Financial Aid Loan Origination process.
All Direct Lending loan item types can support the concept of a disbursement plan and split code scheme that supports multiple disbursement IDs within a term. COD currently supports up to 20 total disbursements per loan application for both Stafford and PLUS loans. Some examples:
1. A disbursement plan of two semesters (fall and spring) can be setup to convey a total of 10 disbursement IDs, each term assigned with 5 disbursement IDs. However, the first term defined within the disbursement plan and split code is not allowed to have a zero percentage defined for the first term.
2. A disbursement plan of three quarters (fall, winter and spring cannot be used to award a winter and spring DL PLUS loan.
3. To facilitate increases and change processing for a Stafford or PLUS one term direct loan MPN item types, you should set up and define at least four disbursement IDs for the term.
All non-Direct Lending programs must have disbursement plan and split code schemes that do not include any zero percentages or zero amounts in any disbursement ID. This includes any alternative loans processed using the CommonLine file format and process. All non-DL loans with a zero amount associated with a disbursement ID are rejected during the initial origination process. For example, a disbursement plan of three quarters (fall, winter, and spring) cannot be used to award a winter and spring TERI loan.

Plan	Enter a two-character code (alphanumeric) for the disbursement plan. You should use sequential numeric codes (such as 01, 02, 03) rather than skipping numbers (02, 01, 03).
Description	Enter descriptions that easily distinguish one plan from another for easy identification.
30 Day Delay Loan Plan	Select to indicate that the associated disbursement plan has a 30-day delay for the first loan disbursement. A first-time freshman receiving a loan cannot receive the first disbursement for the loan until 30 days into the term. You need to establish a separate disbursement plan for this instance. Review the setup for the 30-day rule for your institution on the Financial Aid Defaults page. See Defining Installation Level Defaults.

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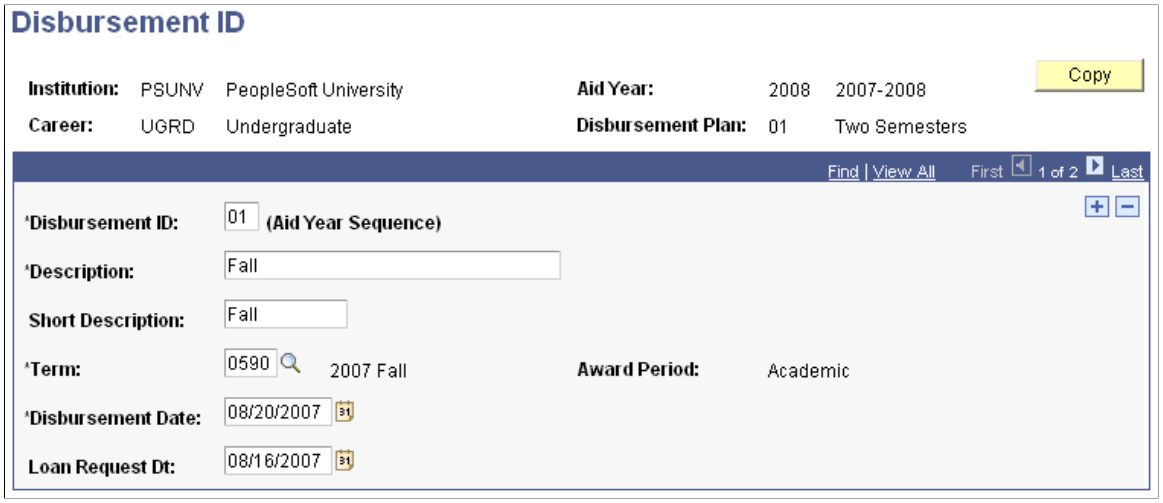
Setting Up Disbursement IDs

Access the Disbursement ID page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement ID Table, Disbursement ID).

Image: Disbursement ID page

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



Disbursement IDs provide all the possible target disbursement dates with a specific disbursement plan. Disbursement split codes and formulas create the disbursement patterns and distribution percentages to each applicable disbursement ID. When you run the disbursement and authorization processes to disburse aid to a student's account, the system reviews a comprehensive set of rules to ensure the eligibility of aid to a student's account. For example, a federal SEOG award may be targeted to disburse on the first day of the term; however, aid is not disbursed until a student completes the verification process.

Disbursement ID

Enter a two-digit number for each term's disbursement that occurs in the disbursement plan identified at the top of the page. The number indicates the aid year sequence for the disbursements for this plan. For example, you may assign your fall term an *01* disbursement ID, winter term an *02,* and spring term an *03.* The aid year sequence for this disbursement plan would be 01, then 02, and then 03. Disbursements process in sequential order within a disbursement plan.

Ensure that if the term includes a nonstandard term, such as a summer term, the nonstandard term is placed in the correct sequence. For example, if the disbursement plan includes a disbursement during the summer term and your institution has a leading summer term, the disbursement IDs for the summer term must come before those for terms in the academic award period.

If your disbursement plan has the 30-Day Delay check box selected, define a disbursement ID to accommodate this condition with the appropriate disbursement date.

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Term

Select the academic term to which this disbursement ID applies. The system populates the Award Period, Disbursement Date, and Loan Request Dt (loan request date) fields based on the selected term when you move out of this field. Verify that the term is associated with an award period compatible with the award periods spanned by the disbursement plan.

Award Period

Displays the award period associated with the selected term. Verify that the term corresponds to the correct award period. To correct the award period, use the Valid Terms for Career page to change the term's award period.

Disbursement Date

This is the date on which financial aid should be applied to the student's account. After the term value is entered, the system defaults a disbursement date of 10 days prior to the term begin date, which is defined in Student Records on the Term/Session Table component. You can override this date. If you plan to disburse more than once a term, the disbursement date for each disbursement ID needs to correspond to when you want the disbursements to initially occur. For example, for a monthly disbursement during the fall term, the first disbursement ID could use the defaulted date, for example August 15. The next disbursement ID would have a disbursement date of September 15, the third disbursement ID would have a disbursement date of October 15, and so on.

Note: Current federal guidelines state that federal financial aid cannot be disbursed to a student more than 10 days prior to the first day of the term, and that federal financial aid should be disbursed separately for each term.

Loan Request Dt (loan request date)

Enter the date you are requesting loan funds to be sent from the lender to your institution. The default loan request date is 13 days prior to the term start date, which is the current federally defined legal maximum.

Note: The loan request date is carried forward to the Loan Origination pages where the date can be modified. Care should be taken to ensure that loan request dates remain in sync.

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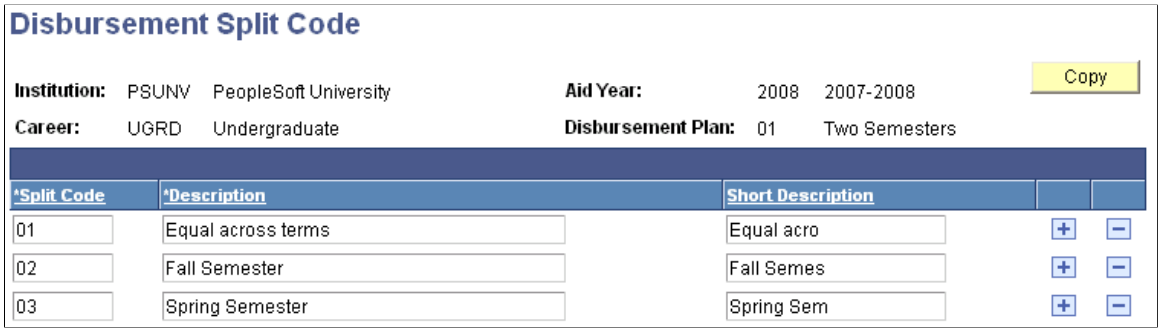
Setting Up Disbursement Split Codes

Access the Disbursement Split Code page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Codes, Disbursement Split Code).

Image: Disbursement Split Code page

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



Disbursement split codes put a label to various disbursement schemes that instruct the system how to divide an award disbursement amount among terms. For example, if your institution has three terms, you would want one split code to split disbursements equally among the three terms. You usually have more than one split code per disbursement plan depending on the business practices of your institution and the needs of your financial aid office. You define the distribution percentages to these split codes further in the Disbursement Split Code Formula setup. You can configure all disbursements on a individual award basis; however, it is better to for you to define most of the schemes in advance.

Split Code Enter a two-character code for the split code you are defining for this disbursement plan. You can define the split code with numbers or characters.

Description Enter a description that distinguishes one plan from another for easy identification. For example, a split code of Two Semesters could indicate disbursements should be split in two—one for fall term and one for spring term.

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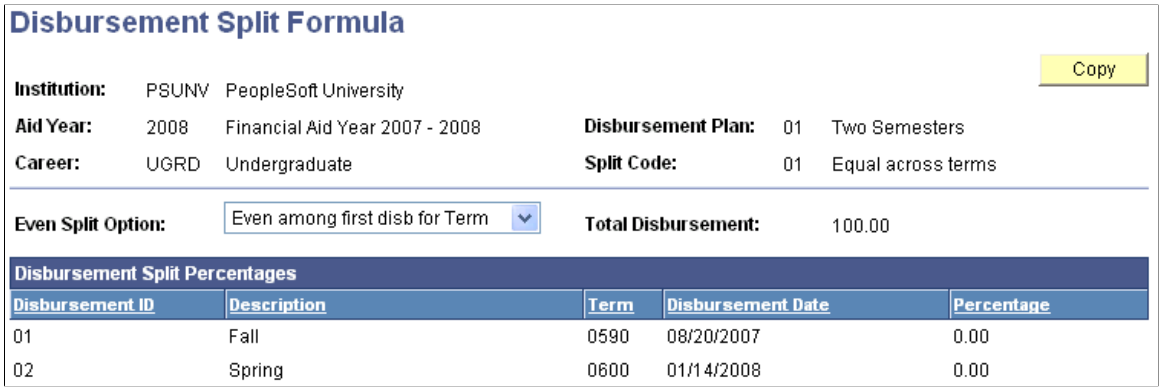
Defining Split Code Formulas

Access the Disbursement Split Formula page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Cd Formula, Disbursement Split Formula).

Image: Disbursement Split Formula page

This example illustrates the fields and controls on the Disbursement Split Formula page. You can find definitions for the fields and controls later on this page.



Split code formulas define what percentage of the award should be disbursed for each disbursement ID for each disbursement plan and split code combination. Define the split code formula for each split code that you have defined for your institution.

Even Split Option

Select a value in this field to split the award amount equally among all terms or equally among all disbursements in a term, instead of manually splitting the award using percentages. This field affects how disbursement-protected awards are distributed when they are modified.

If you select an Even Split Option, you cannot enter any values in the percentage fields.

See Protecting Disbursements During Awarding.

In the following discussion, *term target amount* refers to the total disbursement amount within the term.

- *(none):* Do not select an even split option if you want to define percentages for each disbursement instead of evenly distributing the disbursements. You must enter the percentage of the total award each disbursement ID should receive in the Percentage field. The total of all percentages entered must equal 100.00.

- *Even across disbs by Term* (even across disbursements by term): Select this option to evenly distribute an award across terms. The award is distributed evenly across the number of terms and evenly across the number of disbursements within each term. For example, the student's award is 3,000. 00 USD for three terms and there are two Disbursement IDs

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per term. The term target amount is 1,000.00 USD for each term and 500.00 USD for each disbursement ID in the term.

Note: This option can be used when you want to spread Pell Grant across multiple Disbursement IDs per term.

- *Even across disbs for One Term* (even across disbursements for one term): Select this option to evenly distribute an award among all Disbursement IDs in a single term.
- *Even among first disb by Term* (even among first disbursement by term): Select this option to evenly distribute an award among only the first disbursements of each term within a disbursement plan regardless of the number of disbursements in the term.. For example, the student's award is 3,000.00 USD for three terms and there are two disbursement IDs per term. The term target amount is 1,000.00 USD for each term and the first disbursement ID of that term only.

  Note: This option is used by Direct Lending loan item types. This option supports multiple Disbursement IDs per term to allow for loan increases and award changes for DL Stafford and DL PLUS MPN processing.

- *PELL: User-defined Splits*: Select this option to manually define percentages for each disbursement using the following parameters:

  1. The sum of all percentages entered must total 100.00 percent.

  2. The sum of the percentages for each term must equal. If there are an odd number of terms (e.g., 3 terms for a quarter-based school), a 0.01 percent tolerance is permitted on percentages carried to the hundredths place (e.g., 33.33%/33.33%/33.34%).

  3. You are able to specify 0.00 percent for a given Disb ID as long as the term percentages are equal.

  4. Because the percentages across terms must be equal, the system compares each term's percent to the other terms. You can, however, exclude terms from this comparison by selecting the Exclude Term check box. If you do this, the selected term is not considered when determining if all the terms' percentages are equal. Select the Exclude Term check box to prevent a 0.00 percent term from being counted during the "equal percents" comparison.

  When using the *PELL: User-defined Splits* option for Pell Grant awarding, the system first determines the term percentage and uses that as the *denominator* and uses the

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user-defined Disb ID percent as the *numerator* to determine the disbursement amount. Then the term award amount is multiplied by this fraction to determine the award amount that for that particular Disb ID.

For example, a two-term, semester-based school results in a percentage of 50 percent for each term. Assuming an annual award is 1,000.00 USD, then the term award amount is 500. 00 USD per term. If the institution sets up four Disb IDs per term as follows:

FALL Disb ID 01 = 15%

FALL Disb ID 02 = 0%

FALL Disb ID 03 = 35%

FALL Disb ID 04 = 0%

SPRING Disb ID 05 = 15%

SPRING Disb ID 06 = 0%

SPRING Disb ID 07 = 35%

SPRING Disb ID 08 = 0%

Then, the system makes the following calculations:

FALL Disb ID 01 = (15/50) * 500.00 = 150.00

FALL Disb ID 02 = (0/50) * 500.00 = 0.00

FALL Disb ID 03 = (35/50) * 500.00 = 350.00

FALL Disb ID 04 = (0/50) * 500.00 = 0.00

SPRING Disb ID 05 = (15/50) * 500.00 = 150.00

SPRING Disb ID 06 = (0/50) * 500.00 = 0.00

SPRING Disb ID 07 = (35/50) * 500.00 = 350.00

SPRING Disb ID 08 = (0/50) * 500.00 = 0.00

Note: Only 0.00 percent terms can be excluded. You cannot exclude non-zero percent entries.

Note: This option can only be used with Pell Financial Aid Item types.

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Note: When using this option, the Pell award is not returned as a custom split so that during any subsequent award validation, these percentages continue to be honored.

Total Disbursement

The sum of the percentages that you have entered. Your percentages must add up to 100 percent for the entire year.

Percentage

This field is not available if you select an even split option. Select the percentage of the total award you want to disburse for the given disbursement ID. Your percentages should match the description of your split codes. For example, for a two-semester disbursement plan, if your split code is set up for a 40/60 split between terms, the percentages for each semester would be 40 percent for the fall disbursement ID and 60 percent for the spring disbursement ID.

Midpoint

Select to identify the midpoint date.

This field is available when the Even Split Option is *Even across disbs for One Term* and communicates which Disb ID reflects the midpoint of the term.

Exclude Term

Select the Exclude Term check box to prevent a 0.00 percent term from being counted during the matching process.

Note: This field is available when selecting the Even Split Option *PELL: User-defined Splits*.

Comparison of Even Split Option Values

Here's a comparison of four Even Split Options using an annual 1000.00 USD award amount over two terms (500.00 USD per term) and eight Disbursement IDs (all amounts in USD). The *PELL: User-defined Split* option is based on the example in the Even Split Option field description:

Even Split Option	*Fall Term 01*	*Fall Term 02*	*Fall Term 03*	*Fall Term 04*	*Spring Term 05*	*Spring Term 06*	*Spring Term 07*	*Spring Term 08*
Even across Disbs by Term	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00
Even Among First Disb by Term	500.00	0.00	0.00	0.00	500.00	0.00	0.00	0.00
Even across Disb for One Term	125.00	125.00	125.00	125.00	0.00	0.00	0.00	0.00

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Even Split Option	*Fall Term 01*	*Fall Term 02*	*Fall Term 03*	*Fall Term 04*	*Spring Term 05*	*Spring Term 06*	*Spring Term 07*	*Spring Term 08*
PELL: User-defined Split	150.00	0.00	350.00	0.00	150.00	0.00	350.00	0.00

Setting Up Aggregate Aid

To set up aggregate aid, use the Aggregate Level Translation component (AGGR_LVL_XREF), the Aggregate Programs component (AGGR_PROG_TABLE), the Aggregate Aid Limits component (AGGR_AID_TBL), the Aggregate Area Translation component (SFA_AGGR_AREA_XREF), and the Aggregate Area for Institution component (SFA_NSLDS_AGG_INST.

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

- Review aggregate levels.
- Establish aggregate programs.
- Create aggregate aid limits.
- Create aggregate area translations.
- Selecting aggregate areas for institutions.

Understanding Aggregate Aid

To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete aid history when determining aid eligibility. The system provides several setup options and methods to maintain aggregate or history aid to ensure that eligibility requirements and award limits are followed.

The National Student Loan Data System (NSLDS) provides an integrated, historical view of all of a student's Title IV loans and grants during all stages of the awards' life cycles – from aid approval through disbursement, any overpayments, repayment, delinquency, and closure. To use NSLDS data in the Awarding and Packaging processes, NSLDS must be loaded, pushed to aggregate aid tables, and the Packaging process must be directed to use NSLDS as an aggregate source to assess how much aid had been used towards lifetime limits.

See Using NSLDS Data and Processes.

See Managing Aggregate Aid.

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Pages Used to Set Up Aggregate Aid

Page Name	*Definition Name*	*Navigation*	*Usage*
Aggregate Level Cross-Reference	AGGR_LVL_XREF	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Level Cross-Reference	Review aggregate levels and link the NSLDS Loan Year definitions from the U.S. Department of Education with your institution's specific aggregate level values and descriptions for aggregate levels.
Aggregate Program	AGGR_PROG_TABLE	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Programs, Aggregate Program	Establish aggregate aid program limits for Stafford programs for both FFELP and Direct Lending.
Aggregate Aid Limit	AGGR_AID_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits, Aggregate Aid Limit	Create aggregate aid limits for annual and aggregate aid limits to meet your business processing rules.
Copy Aggregate Aid Limits	AGGR_AID_COPY	Click the Copy button on the Aggregate Aid Limit page.	Copy aggregate aid limit setup from one aggregate area/aid year/effective date combination to another.
Aggregate Area-NSLDS Cross reference	SFA_AGGR_AREA_XREF	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Area Translation, Aggregate Area-NSLDS Cross reference	Create translations for each of your aggregate areas to one of the NSLDS aggregate categories.
Aggregate Areas for Institution	SFA_NSLDS_AGG_INST	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Area for Institution, Aggregate Areas for Institution	Identify aggregate areas to be evaluated for an institution during the NSLDS Push Data process.

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Reviewing Aggregate Levels

Access the Aggregate Level Cross-Reference page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Level Cross-Reference).

Image: Aggregate Level Cross-Reference page

This example illustrates the fields and controls on the Aggregate Level Cross-Reference page. You can find definitions for the fields and controls later on this page.

Aggregate Level Cross-Reference

Aggregate Level	NSLDS Loan Year	Graduate Level	Description	Short Description
G1	1st Year Graduate	☑	Graduate 1st Year	Grad 1
G2	2nd Year Graduate	☑	Graduate 2nd Year	Grad 2
G3	3rd Year Graduate	☑	Graduate 3rd Year	Grad 3
G4	4th or more Graduate	☑	Graduate 4th Year	Grad 4
P1	Graduate/Professional	☑	Professional Students	Profession
P2	Graduate/Professional	☑	Professional Students	Profession
P3	Graduate/Professional	☑	Professional Students	Profession
P4	Graduate/Professional	☑	Professional Students	Profession
U0	1st Year - Never Attended	☐	Undergraduate Freshman - Never	Fresh-nev
U1	1st Year - Previously Attended	☐	Undergraduate Freshman	Freshman
U2	2nd Year	☐	Undergraduate Sophomore	Sophomore
U3	3rd Year	☐	Undergraduate Junior	Junior
U4	4th Year	☐	Undergraduate Senior	Senior
U5	5th Year+	☐	Undergraduate Senior, 5th Year	5th Year

The system populates this table.

Aggregate Level

A two-digit alphanumeric code that you assign to describe a student's year in school. Use the Description and Short Description fields to provide a full description of the student's year in school or aggregate level. To support cumulative aggregate processing all aggregate levels must conform to a sequential structure to apply award history balances against aggregate cumulative limits. If your institution deems it necessary to introduce a new Aggregate Level than what is provided, then you must follow the same hierarchical structure that each level's two-character aggregate level collate in ascending sequence.

NSLDS Loan Year

Select the U.S. Department of Education NSLDS loan year value that you want to associate with each aggregate level appearing on the page.

NSLDS loan year values are delivered with your system as translate values. These translate values should not be changed or modified in any way.

Graduate Level

Select if the associated aggregate level/NSLDS loan year combination is a graduate or postgraduate level. This identifies a student with the associated aggregate level as either a graduate/

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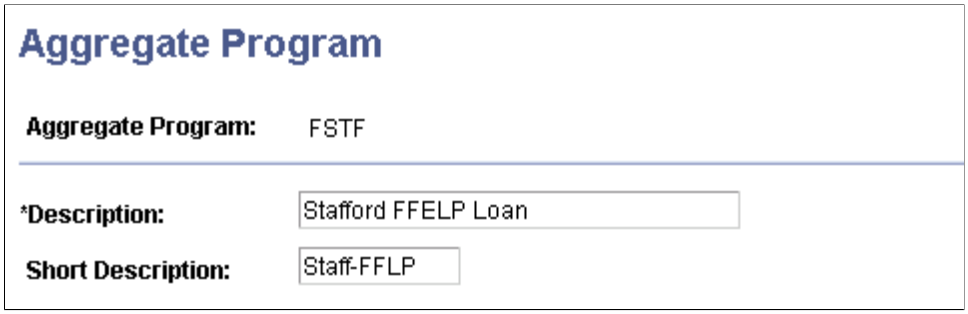
professional or undergraduate for the purpose of determining federal eligibility.

Establishing Aggregate Programs

Access the Aggregate Program page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Programs, Aggregate Program).

Image: Aggregate Program page

This example illustrates the fields and controls on the Aggregate Program page.



Aid program limits link aggregate areas together to enable you to combine limits between subsidized and unsubsidized loan aggregate area limits.

The following four loan programs are the only values available for selection:

Value	*Description*
Direct - Stafford (DSTF)	Defines the Stafford aggregate area program subsidized and unsubsidized eligibility limits for Direct Lending. Links the Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.
Direct - HEAL (DLHL)	Currently does not support aggregate aid processing for the HEAL program. Defines the HEAL Stafford aggregate area program subsidized and unsubsidized eligibility limits for Direct Lending. Links the HEAL Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.
FFELP - Stafford (FSTF)	Defines the Stafford aggregate area program eligibility limits for FFELP. Links the Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.
FFELP - HEAL (FLHL)	Currently do not support aggregate aid processing for the HEAL program. Defines the HEAL Stafford aggregate area program eligibility limits for FFELP. Links the HEAL Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.

Although the loan programs are delivered with Financial Aid and are hard-coded, you must activate the loan program link by adding the description to each loan program and linking it to the appropriate aggregate aid limits.

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Creating Aggregate Aid Limits

You have several rule options available within the aggregate aid limit setup. You can define aggregate areas for:

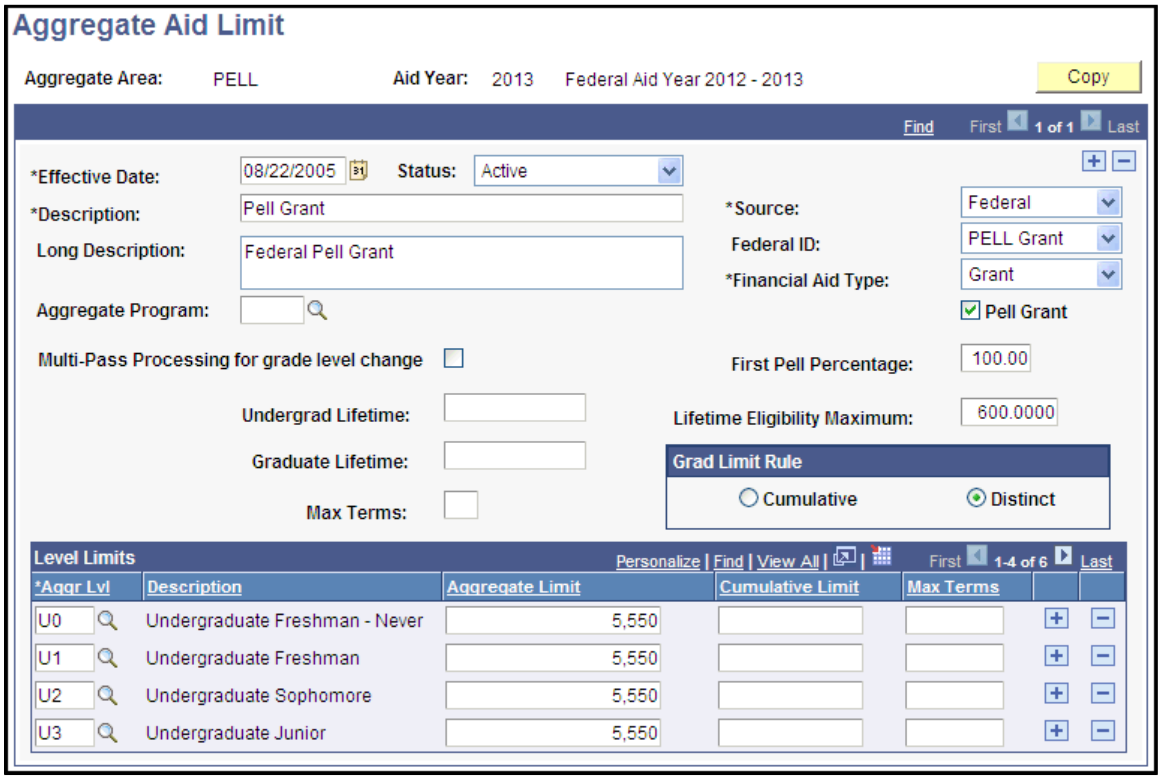
- Undergraduate and graduate grade level groups. For example grade levels 0 - 5 would sum toward an undergraduate limit
- Individual academic levels
- Cumulative limits across aid years

An optional Multiple Pass Processing (MPP) option automates mid-year grade level limit increases. The MPP option is currently not available for any aggregate area defined as federal Stafford Loan (Subsidized or Unsubsidized.)

Access the Aggregate Aid Limit page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits, Aggregate Aid Limit).

Image: Aggregate Aid Limit page

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



Note: The Aggregate Aid Limit setup page dynamically displays options based on the source and type of aid.

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Warning! Because financial aid item type information is shared across the PeopleSoft Campus Solutions database, you must use the same aggregate area for all financial aid item types for the same type of aid. For example, if you have separate subsidized Stafford financial aid item types for graduates and undergraduates, both subsidized Stafford financial aid item types must point to the same subsidized Stafford aggregate area. You have the option to associate an aggregate area with one or many financial aid item types. If you have multiple institutions, coordinate aggregate areas and aid types to ensure that aid limits are calculated correctly for students who may be receiving aid from multiple institutions.

Aggregate Program

If this aggregate area belongs to the federal Stafford program select the appropriate aggregate program. Aggregate program limits link aggregate areas together to enable you to combine limits between subsidized and unsubsidized Stafford loan aggregate area limits.

Source

Select the funding source. You can select *Federal, Institutnl* (institutional), *Other, Private,* or *State.* The value that you enter here must match the source of the financial aid item type. If it does not, you cannot associated this aggregate area with the financial aid item type, because the aggregate area does not appear as an option in the Aggregate Area field on the FA Item Type 1 page.

Federal ID

This field is available only if you select *Federal* as the source. Select the value that identifies the type of federal aid the aggregate area tracks.

Values are: *GAANN* (Graduate Assistance in Areas of National Need), *Grad PLUS, HEAL, HPSL, LDS, Javits* (Jacob K. Javits Fellowship), *NIH* (National Institute of Health), *NSF* (National Science Foundation),*Nursing Ln* (nursing loan), *Other* (Other Federal Fund), *PCL, PELL Grant, PLUS, Perkins Ln* (Perkins Loan), *SEOG, Subsidized, TEACH, Unsubsidized,* or *Work Study.*

Note: You must define the federal ID for all federal aggregate areas currently used in your system. Also, be sure that your federal financial aid item types have the same federal ID as the aggregate area with which they are associated. For example, your Pell Grant financial aid item types and your Pell Grant aggregate area should both have a federal ID of *Pell Grant.* You must select the correct federal ID to have the federal aggregate area use the correct limits.

Financial Aid Type

Select the value that identifies the type of financial aid this aggregate area tracks.

Pell Grant

Select to activate Pell-only processing rules if you are defining a Pell Grant aggregate area. This check box is available only if you select *Grant* as the financial aid type.

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Loan Program

Select the type of loan program tracked by the aggregate area. This field is available only if you select *Loan* as the financial aid type.

Loan Interest Attribute

Indicates whether the government pays the interest on the loan. This field is available only if you select *Loan* as the financial aid type.

Subsidized: The government pays the interest on the loan while the student is in school, during the six-month grace period, and during any deferment periods.

Unsub (unsubsidized): The government does not pay the interest on the loan.

Max Terms (maximum terms)

Enter the maximum number of terms that students can receive this type of aggregate aid during their lifetime, regardless of career. This is optional for most aggregate areas but should be defined and used in accordance with the requirements of a particular source of funding. This field is currently not used in processing.

Undergrad Lifetime (undergraduate lifetime)

Enter the maximum amount of this type of aggregate aid that students can receive during their undergraduate career. This is optional for many aggregates but should be defined and used in accordance with the requirements for a particular source of funding. This field is mandatory for the following federal aggregate areas: Perkins, subsidized Stafford, and unsubsidized Stafford.

Graduate Lifetime

Enter the maximum amount of this type of aggregate aid that students can receive during their graduate career. This is optional for many aggregate areas but should be defined and used in accordance with the requirements for a particular source of funding. This field is mandatory for the following federal aggregate areas: Perkins, subsidized Stafford, and unsubsidized Stafford. The Grad Limit Rule determines whether undergraduate aid counts toward this graduate lifetime amount.

Failure to establish undergraduate and graduate lifetime limits for Perkins, subsidized Stafford, and unsubsidized Stafford aggregate areas can result in the Packaging process awarding more than the lifetime maximum amounts the student is eligible to receive.

Indep Undergrad Lifetime

This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter the maximum amount that supports the Independent Undergraduate Lifetime limit for Unsubsidized loans.

Dep Undergrad Lifetime

This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter the maximum

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amount that supports the Dependent Undergraduate Lifetime limit for Unsubsidized loans

Grad Limit Rule (graduate limit rule)

Identifies whether the graduate lifetime amount should be calculated as distinct from or cumulative with the undergraduate amount.

Cumulative: The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. For example, you use a cumulative graduate limit rule when a student is eligible for up to 40,000.00 USD in Perkins loans for both undergraduate and graduate careers, only 20,000.00 USD of which can be awarded during the undergraduate career.

If students received the full 20,000.00 USD during their undergraduate enrollment, they may not receive more than 20,000.00 USD in their graduate enrollment—totaling 40, 000.00 USD between their undergraduate and graduate enrollments. No student receives more than 40,000.00 USD during undergraduate and graduate enrollments.

Total graduate amounts on the various aggregate summary pages reflect undergraduate accumulations if the aggregate area is defined as cumulative.

Distinct: The undergraduate and graduate limits are tracked separately. For example, you use a distinct graduate limit rule when a student is eligible for up to 20,000.00 USD as an undergraduate and up to 40,000.00 USD as a graduate, for a total of 60,000.00 USD.

Aggr Lvl (aggregate level)

List each aggregate level that has an annual aggregate limit. Aggregate levels and their accompanying definitions come from the Aggregate Level Cross-Reference page.

Aggregate Limit

Enter the maximum amount of aggregate aid that can be awarded while the student is at the associated academic level within a particular aid year. This aggregate limit can set the award amount returned by the Packaging process. This field is optional for most aggregate areas. This field is mandatory for the following federal aggregate areas: Pell, SEOG, Perkins, subsidized Stafford, and unsubsidized Stafford.

Cumulative Limit

Enter the maximum amount of aggregate aid that can be awarded while the student is at the associated aggregate level. Entering a value here activates cumulative aggregate level checking and allows aggregate level limits across aid years.

For example, the federal Perkins loan program sets a limit of 8,000.00 USD for any student who has not completed two academic years of undergraduate work. In the example of the federal Perkins loan, aggregate levels U0, U1, U2 all

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would have a cumulative limit set to 8,000.00 USD and annual aggregate limits set to 4,000.00 USD.

Independent Annual Limit

This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Independent Undergraduate Annual Aggregate Level limit for Unsubsidized loans.

Dependent Annual Limit

This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Dependent Undergraduate Annual Aggregate Level limit for Unsubsidized loans

Multi-Pass Processing mid-year level change

Select this check box to have the Awarding and Packaging processes automatically determine increased aid eligibility if multiple grade levels are present for the student.

First Pell Percentage

This field appears when the Aggregate Area has been activated as a Pell Grant. Enter *100.00* to ensure students are fully awarded a first Pell Grant (Pell1). If you enter any value less than 100.00, students are not fully awarded a Pell1. To calculate a student's remaining eligibility percentage for a Pell1, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Aggregate Aid plus the Total Percent Used from prior Pell1 awards in the system) from this field.

Lifetime Eligibility Maximum

This field appears when the Aggregate Area has been activated as a Pell Grant and Aid Year is 2013 and beyond. Enter the maximum percentage for a student's Lifetime Pell Eligibility. For example, when the United States Department of Education says that a student cannot exceed 12 full-time semester terms (translated as 600 percent), then you would enter 0600.0000 in this field. An individual student's Lifetime Eligibility Used percentage plus current year system-generated Pell Grant award cannot exceed this maximum percentage.

Second Pell Percentage

Bundle 48

Added capability to award Year Round Pell beginning with the 2017–2018 Aid Year.

This field appears when the Aggregate Area has been activated as a Pell Grant. Enter 150.00 to ensure that students are fully awarded a Pell2. If you enter any value less than 150.00, students are not fully awarded a Pell2. To calculate a student's remaining eligibility percentage for a Pell2, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Aggregate Aid plus the Total Percent Used from prior Pell1 and Pell2 awards in the system) from this field.

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Using Aggregate Areas with Multiple Pass Processing

An optional feature that you set on the Aggregate Aid Limit page is the Multi-Pass processing (MPP) option. Federally funded financial aid programs require strict eligibility requirements and borrowing limits. Most level limits increase as a student progresses in his or her studies. A student who has already borrowed up to the annual level limit within an academic year can receive additional funds if the annual level limit increases because a student advances or progresses to a new grade level with a higher-level limit. Financial Aid provides two procedural options to accommodate and award for an additional increase due to grade level changes. Option one is to use multiple or unique item types with different disbursement plans and split codes to support the additional eligibility. The other option is to select the Multi-Pass Processing check box.

Note: MPP is currently unavailable for loan programs that are originated within Financial Aid, such as Direct, FFELP, Health, and Perkins loan programs. Additional information and examples are available on how to handle the awarding loan programs across multiple NSLDS loan years.

See Awarding for Multiple Careers and Managing Special Cases When Packaging Students.

The following table compares aggregate areas with limits to aggregate areas without limits for use in awarding item types and tracking activity:

Activity	***Aggregate Areas with Level Limits***	***Aggregate Areas Without Aggregate Levels or Level Limits***
Awarding Item Types with Aggregate Aid	• Must use separate financial aid item types to award for multiple aggregate levels (NSLDS loan years) in the same aid year. • Total amount of the award is restricted by NSLDS loan year.	• Can award across aggregate levels (NSLDS loan years) without using separate financial aid item types for each aggregate level. • Award amount is not restricted by NSLDS loan year. The only restriction on the award is the lifetime limit.
Tracking Aggregate Activity	The total award is determined and tracked by the aggregate level of the first nonzero disbursement of the award.	The aggregate amount is apportioned among all aggregate levels associated with the terms spanned by the award.

Multi-Pass processing directs the Awarding and Packaging process to evaluate and produce multiple *internal* award entries, each of which reflect a separate set of scheduled disbursement amounts for every change in a student's NSLDS grade level eligibility. That is to say, this process first produces an award with scheduled disbursements according to the lowest level limit, and then generates residual disbursement amounts as the aggregate level limits are increased based on a change in the student's NSLDS level. After these individual awards have been created, the Packaging process internally consolidates all of the scheduled disbursements into a single composite award reflecting the sum total of the individual aggregate level increases for the aid year.

Note: Because split percentages here are successively reapplied during this process, the final consolidated scheduled disbursement award amounts are not necessarily an accurate reflection of the actual split percentages that would normally be expected.

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The following two examples illustrate how the Packaging process proceeds if an item type is associated with an aggregate area with Multi-Pass processing selected and then with Multi-Pass processing cleared.

Example 1 – Multi-Pass Processing (MPP) check box selected.

This example represents an extreme student scenario to help clearly demonstrate the Multi-Pass processing logic. The example shows an increased aggregate limit for each aggregate level; this demonstrates how the Packaging process iterates through each step as the award schedule disbursement are being built up, before the disbursements are consolidated into a single award:

Item Type = 900000000810, Mackor Scholarship Grant

Disbursement Plan = 04

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area FIRE - Level Limits setup

U1 = 2,000

U2 = 4,000

U3 = 5,000

First internal pass based on U1 eligibility:

Term	***Aggregate Level***	***Award Sequence***	***Item Type***	***Aggregate Area***	***Split Code***	***Disb Detail***
Fall	U1	01	900000000810	FIRE	01- even	666.66
Winter	U2	01	900000000810	FIRE	01- even	666.67
Spring	U3	01	900000000810	FIRE	01- even	666.67

Second internal pass to accommodate increased eligibility from U1 to U2:

Term	***Aggregate Level***	***Award Sequence***	***Item Type***	***Aggregate Area***	***Split Code***	***Disb Detail***
Fall	U1	01	900000000810	900000000810	01- even	0
Winter	U2	01	900000000810	900000000810	01- even	1,000.00
Spring	U3	01	900000000810	900000000810	01- even	1,000.00

Third internal pass to accommodate increased eligibility from U2 to U3:

Term	***Aggregate Level***	***Award Sequence***	***Item Type***	***Aggregate Area***	***Split Code***	***Disb Detail***
Fall	U1	01	900000000810	FIRE	01- even	0

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Term	*Aggregate Level*	*Award Sequence*	*Item Type*	*Aggregate Area*	*Split Code*	*Disb Detail*
Winter	U2	01	900000000810	FIRE	01- even	0
Spring	U3	01	900000000810	FIRE	01- even	1,000.00

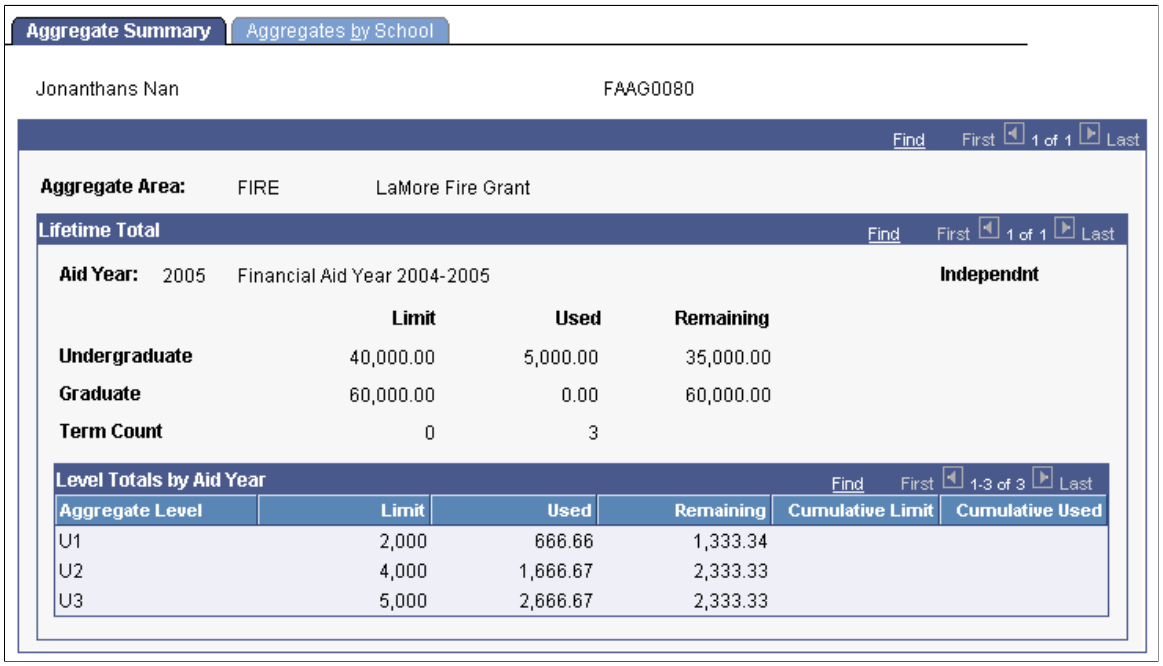
Final posted award: Item Type = 900000000810 5,000 USD (note overall award did not exceed the highest level limit. In this example 5,000 USD):

Term	*Student's NSLDS Level*	*Aggregate Level used to assess limit*	*Award Sequence*	*Item Type*	*Aggregate Area*	*Split Code*	*Disb Detail*
Fall	U1	U1	01	900000000810	FIRE	01- even	666.67
Winter	U2	U2	01	900000000810	FIRE	01- even	1,666.67
Spring	U3	U3	01	900000000810	FIRE	01- even	2,666.67

The Aggregate Summary page displays the aggregate level detail when MPP is selected.

Image: Aggregate Summary page with MPP

This example illustrates the Aggregate Summary page with MPP selected.



Example 2 – Multi-Pass Processing (MPP) check box not selected.

Item Type = 900000000810, Mackor Scholarship Grant

Disbursement Plan = 04

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Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area FIRE - Level Limits

U1 = 2,000

U2 = 4,000

U3 = 5,000

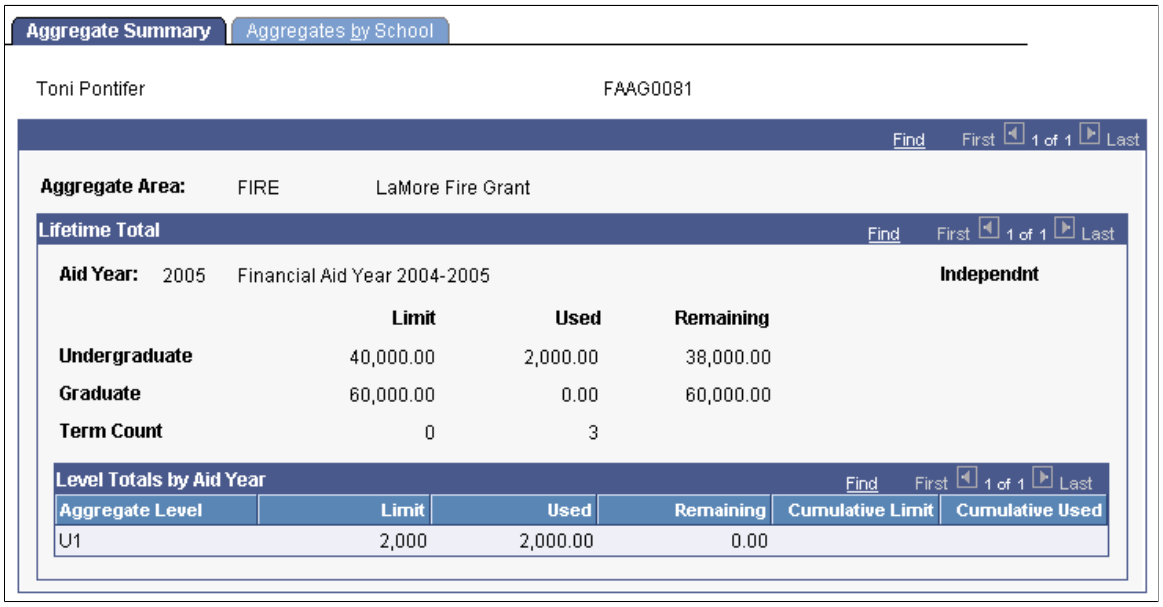
Only one pass evaluated – Final posted award: Item Type = 900000000810 2,000 USD:

Term	*Student's NSLDS Level*	*Agg Level to assess limit*	*Award Seq*	*Item Type*	*Agg Area*	*Split Code*	*Disb Detail*
Fall	U1	U1	01	900000000810	FIRE	01 - even	666.67
Winter	U2	U1	01	900000000810	FIRE	01 - even	666.67
Spring	U3	U1	01	900000000810	FIRE	01 - even	666.67

The following Aggregate Summary page displays aggregate level detail when the MPP is not selected. In this example, the aggregate level U1 is used to determine the aggregate limit balance to draw eligibility from. After the award has been determined, the system spreads the disbursements for that level among all disbursement terms:

Image: Aggregate Aid Summary page with MPP not selected

This example illustrates the Aggregate Aid Summary page with MPP not selected.



Note: When the Multi-Pass processing option is not selected at the aggregate aid level, you must award additional unique item types associated to the same aggregate area to award the increase in grade level eligibility.

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Example 3

Item Type = 900000000815, Mackor Scholarship Grant II

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area - Level Limits

U1 = 2,000

U2 = 4,000

U3 = 5,000

Only one pass evaluated - Final posted award: Item Type = 900000000810 2,000 USD:

Term	***Student's NSLDS Level***	***Aggregate Level used to assess limit***	***Award Sequence***	***Item Type***	***Aggregate Area***	***Split Code***	***Disb Detail***
Fall	U1	U1	01	900000000810	FIRE	01 - even	666.67
Winter	U2	U1	01	900000000810	FIRE	01 - even	666.67
Spring	U3	U1	01	900000000810	FIRE	01 - even	666.67

Only one pass evaluated - Final posted award: Item Type = 900000000815 2,000 USD:

Term	***Student's NSLDS Level***	***Aggregate Level used to assess limit***	***Award Sequence***	***Item Type***	***Aggregate Area***	***Split Code***	***Disb Detail***
Fall	U1	N/A	02	900000000815	FIRE	05 - 0%	0.00
Winter	U2	U2	02	900000000815	FIRE	05 - 50%	1,000.00
Spring	U3	U2	02	900000000815	FIRE	05 - 50%	1,000.00

Only one pass evaluated - Final posted award: Item Type = 900000000816 1,000 USD:

Term	***Student's NSLDS Level***	***Aggregate Level used to assess limit***	***Award Sequence***	***Item Type***	***Aggregate Area***	***Split Code***	***Disb Detail***
Fall	U1	N/A	03	900000000816	FIRE	04 - 0%	0.00
Winter	U2	N/A	03	900000000816	FIRE	04 - 0%	0.00

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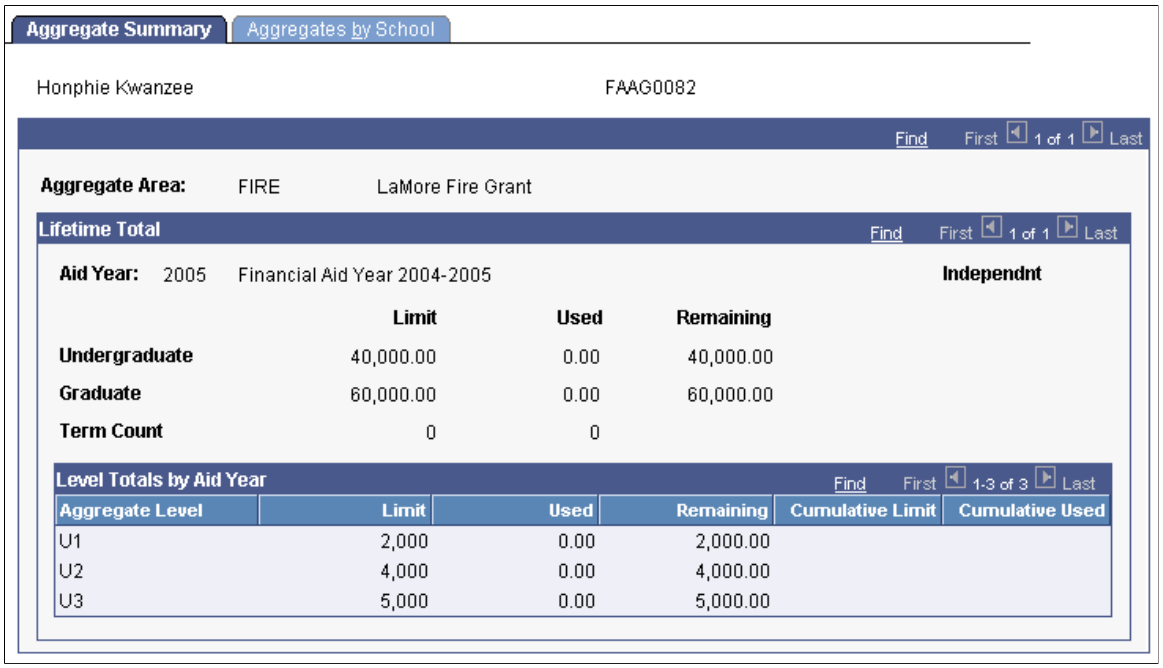
Term	*Student's NSLDS Level*	*Aggregate Level used to assess limit*	*Award Sequence*	*Item Type*	*Aggregate Area*	*Split Code*	*Disb Detail*
Spring	U3	U3	03	900000000816	FIRE	04 - 100%	1,000.00

The following Aggregate Summary page displays the result of using three separate financial aid item types used to accommodate and award the increase in eligibility due to NSLDS grade level changes. All of the financial aid item types must be associated to the FIRE aggregate area:

Image: Aggregate Summary page with results of three FA item types

This example illustrates the fields and controls on the Aggregate Summary page with results of three FA item types.



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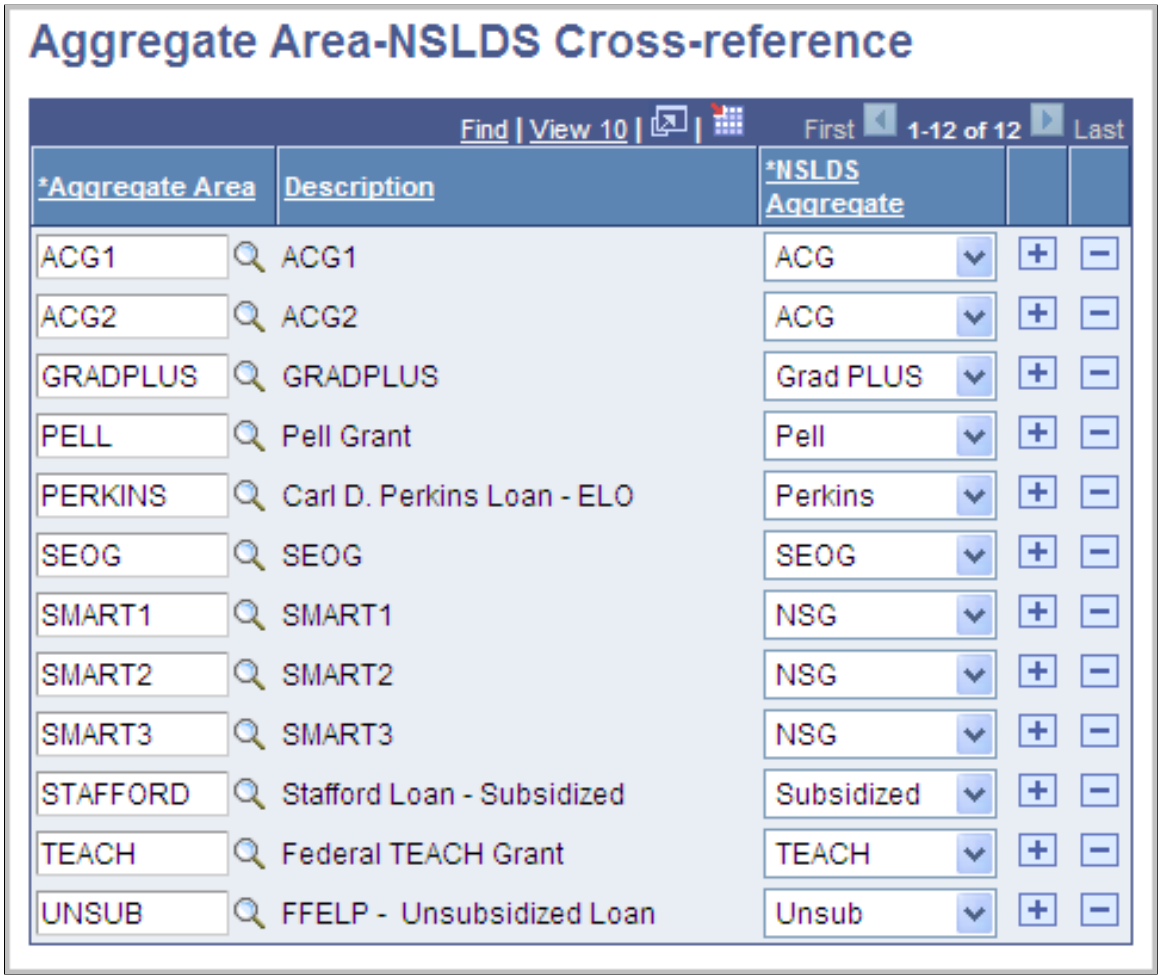
Creating Aggregate Area Translations

Access the Aggregate Area-NSLDS Cross-reference page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Area Translation, Aggregate Area-NSLDS Cross reference).

Image: Aggregate Area-NSLDS Cross-reference page

This example illustrates the fields and controls on the Aggregate Area-NSLDS Cross-reference page. You can find definitions for the fields and controls later on this page.



To use NSLDS data in the Awarding and Packaging processes, you must complete this setup before loading and pushing NSLDS data into packaging aggregate tables.

Aggregate Area

Select the aggregate area to which you want to map an NSLDS aggregate category. If you have created multiple aggregate areas to correspond to a single NSLDS aggregate category, then enter the same number of instances of aggregate areas to correspond to the NSLDS aggregate category.

NSLDS Aggregate

For each aggregate area, select one of the available NSLDS aggregate categories. The aggregate programs used by the NSLDS Aggregate Push are:*Grad PLUS* (Graduate PLUS Loan), *Pell, Perkins* (Perkins Loan), *SEOG, Subsidized, TEACH,* or *Unsub*.

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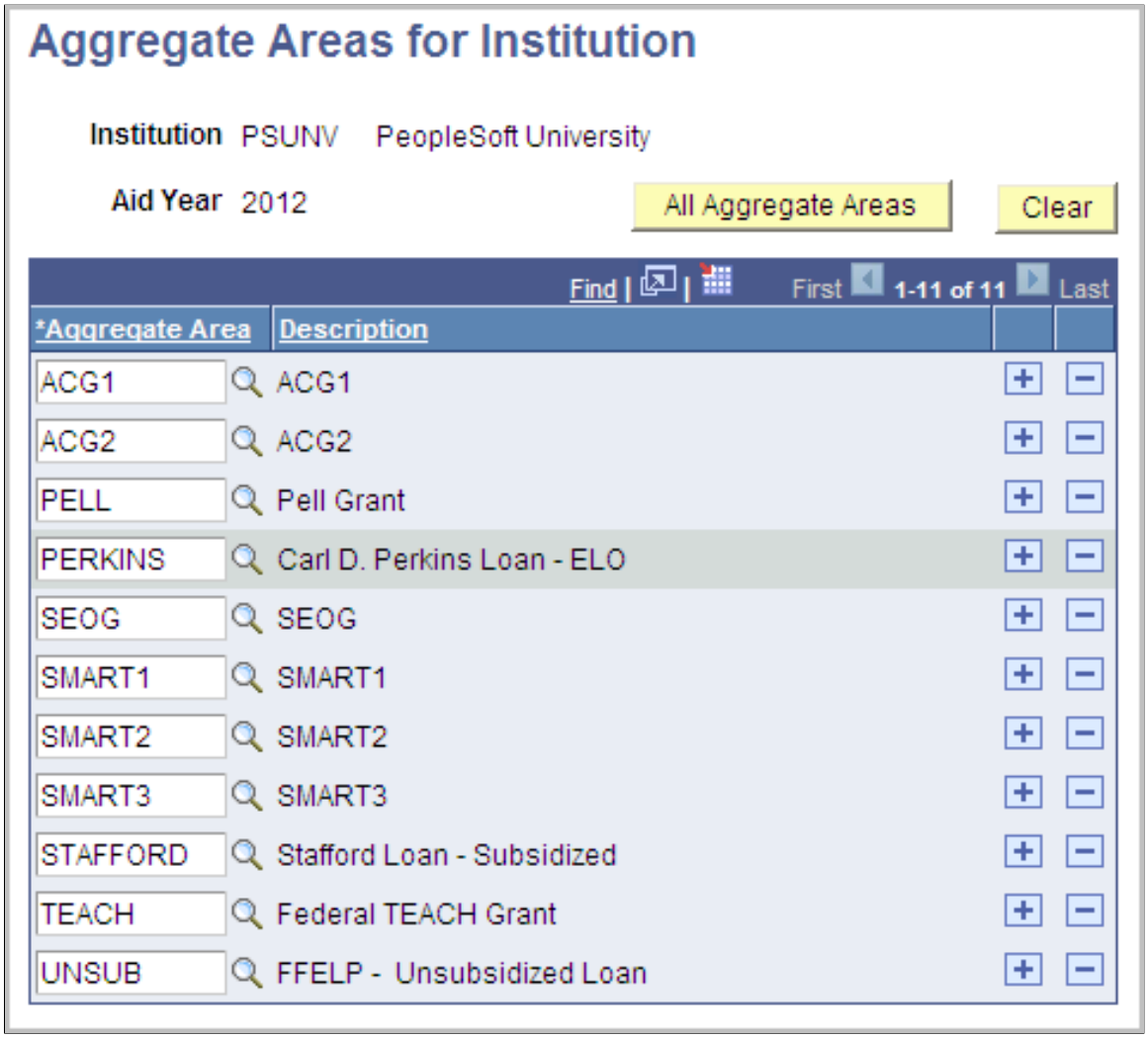
Selecting Aggregate Areas for Institutions

Access the Aggregate Areas for Institution page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Area for Institution, Aggregate Areas for Institution).

Image: Aggregate Areas for Institution page

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



Use this page to select, for an Institution, which Aggregate Areas are evaluated when the NSLDS Data Push process is run.

All Aggregate Areas Select this button to retrieve aggregate areas defined in the Aggregate Area-NSLDS Cross Reference setup component. Select row insert [+] or row delete [-] to adjust the list of aggregate areas to be associated with the Institution.

Related Links

Using the NSLDS Data Push Process

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Setting Up Award Messages

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)

To set up award messages, use the Award Messages component (AWARD_MESSAGES).

Award messages can be linked to financial aid item types and then included on Financial Aid Notification (FAN) letters to students. The delivered setID *MODEL* provides many of the basic award messages needed. However, you can add new messages or modify existing messages.

This section discusses how to define award messages.

Related Links

Defining Disbursement and Anticipated Aid

Pages Used to Set Up Award Messages

Page Name	*Definition Name*	*Navigation*	*Usage*
Award Messages	AWRD_MESSAGE_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Award Messages, Award Messages	Define award messages that can be linked to financial aid item types.
Copy Award Messages	AWD_MESSAGE_COPY	Click the Copy button on the Award Messages page.	Copy award messages from one setID and aid year combination to another.

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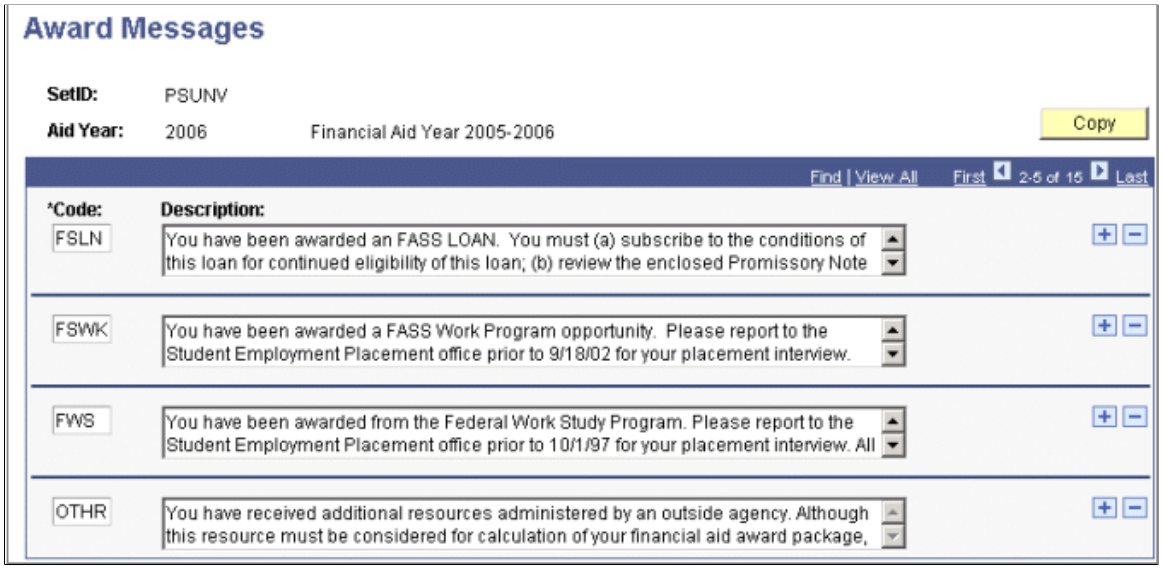
Defining Award Messages

Access the Award Messages page (Set Up SACR, Product Related, Financial Aid, Awards, Award Messages, Award Messages).

Image: Award Messages page

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



For your setID and current processing aid year, create a financial aid message code of OTHR with a description that specifies that the item type be printed as part of Other Resources and to check the Estimate of Resources section of the notification.

Code Enter the four-character code that identifies the award message. This field is alphanumeric, and you can use less than four characters for the code.

Description Enter the text of the award message. The message in this field is printed on the student's FAN letter.

Setting Up Loan Fees

To set up loan fees, use the Loan Fee Setup component (LOAN_FEE_TABLE).

Set up loan fees in the Loan Fee Table to ensure that the correct loan fees are deducted from each loan financial aid item type at the time of awarding. Loan fees are origination and insurance fees that are deducted from the gross amount of the loan. When defining a loan financial aid item type, attach the appropriate loan fees on the FA Item Type 6 page. Remember to create loan fee information for all loan types at your institution.

This section discusses how to create loan fees.

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Page Used to Add Loan Fees

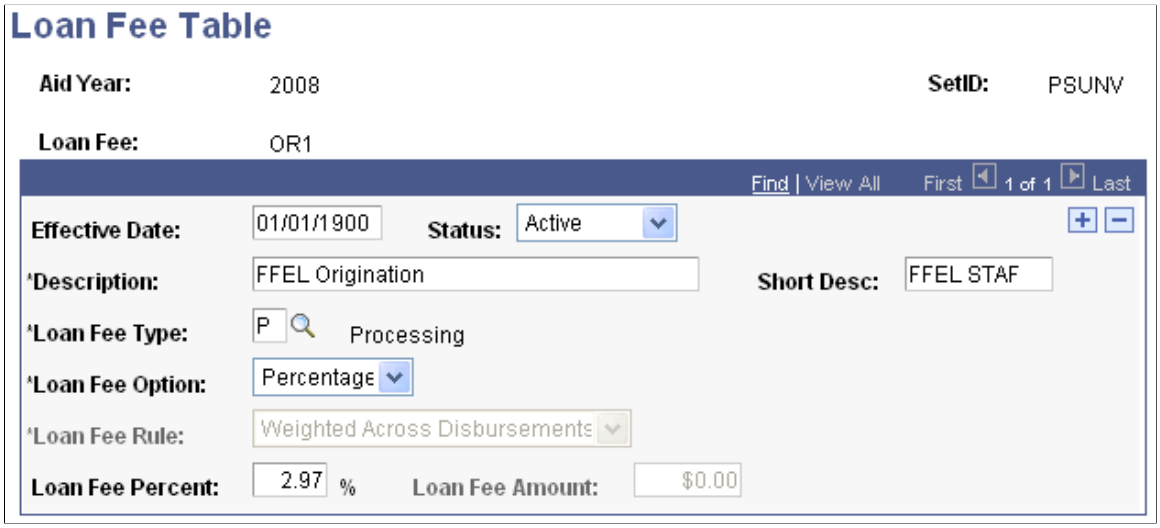
Page Name	*Definition Name*	*Navigation*	*Usage*
Loan Fee Table	LOAN_FEE_TABLE	Set up SACR, Product Related, Financial Aid, Awards, Loan Fee Setup, Loan Fee Table	Create and maintain loan fees.

Creating Loan Fees

Access the Loan Fee Table page (Set up SACR, Product Related, Financial Aid, Awards, Loan Fee Setup, Loan Fee Table).

Image: Loan Fee Table page

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



Loan Fee Type

Select the value that indicates the purpose of the loan fee. Be sure to select *R—Rebate* if the loan fee is an interest rebate, used for the Direct Loan interest rebate.

Note: Any Direct Loan with a zero rebate, must still have a Loan Fee Type attribute defined on the Financial Aid Item Type setup. Once a Direct Loan record is created and based on the Financial Aid Item Type, the appropriate XML Interest Rebate tag is reported to COD.

Loan Fee Option

Select the value that indicates how the amount of the loan fee is determined.

Flat: The loan fee is a flat amount. If you select this value, you must select a Loan Fee Rule and enter the loan fee amount.

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Percentage: The amount of the loan fee is a percentage of the student's award amount. If you select this value, you must indicate the percentage in the Loan Fee Percent field.

Loan Fee Rule

This field is available only if you select *Flat* in the Loan Fee Option field. The loan fee rule determines how the Packaging process distributes the loan fee amount among disbursements.

All in 1st Disbursement: The entire loan fee amount is subtracted from the first disbursement.

Weighted Across Disbursements: The loan fee amount is split among the disbursements according to the disbursement split code percentages.

Loan fee options and loan fee rules are delivered with the system as translate values that cannot be modified in any way. The Packaging process bases certain calculations on these values and changing them would have unforeseen consequences.

Loan Fee Percent

This field is available only if you select *Percentage* in the Loan Fee Option field. The loan fee amount is this percentage of the total award amount.

Loan Fee Amount

This field is available only if you select *Flat* in the Loan Fee Option field. Enter the total loan fee amount.

Processing Direct Loan Interest Rebate

The up-front Direct Loan interest rebate amount of 1.5 percent of the gross disbursement is calculated at the disbursement level for each Direct Subsidized, Direct Unsubsidized, and Direct PLUS loan. The rebate amount is added after the 3 percent loan fee is subtracted from the gross disbursement amount. For example, a student receives a Direct Loan of 1,000.00 USD for the fall 2004 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent rebate of 15.00 USD is added back into the loan.

The Packaging process calculates loan fee amounts for each loan award in a student's financial aid package. These loan fee amounts are set up on the Loan Fee Table page and can be a flat fee or a percentage of the award amount. When setting up the loan fee for the interest rebate feature, you must establish the interest rebate with a loan fee type of *R—Rebate.* Each loan financial aid item type can have various loan fees associated with it.

The Packaging process evaluates the loan fee type. The interest rebate loan fee type is processed differently than other loan fee types. The system processes interest rebate loan fee types using the Department of Education's recommended formula. An interest rebate loan fee is processed after all other loan fees have been applied to the loan award.

The interest rebate amount, as calculated by the Packaging process, is written to a field on the various packaging and awarding tables. Each Direct Loan financial aid item type disbursement balance has an associated interest rebate amount and an associated loan fee amount.

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Related Links

Attaching Loan Fees

Defining Financial Aid Item Types

To set up financial aid item types, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM).

In the Financial Aid Item Types component you can define parameters for your financial aid item types. In addition to awarding financial aid item types, you can set up gap financial aid item types.

This section discusses how to:

- Define financial aid item type descriptions.
- View item type detail.
- Define awarding and rounding rules.
- Define disbursement and anticipated aid.
- Set term minimum and maximum award limits.
- Define default disbursement plans and split codes.
- Attach loan fees.
- Define gap financial aid item types.

Related Links

"Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.2: Student Financials)

Pages Used to Define Financial Aid Item Types

Page Name	*Definition Name*	*Navigation*	*Usage*
FA Item Type 1	ITEM_TYPE_FA_1	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.
Item Type Detail	ITEM_TYPE_TBL_SEC	Click the description of the item type on the FA Item Type 1 page.	View item type detail information from the item type table for this financial aid item type.
Copy FA Item Type Data	ITEM_TYPE_FA_COPY	Click the Copy button on the FA Item Type 1 page.	Copy financial aid item type setup data from one setID, item type, aid year, and effective date combination. combination to another.

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Page Name	*Definition Name*	*Navigation*	*Usage*
FA Item Type 2	ITEM_TYPE_FA_6	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2	Define awarding and rounding rules. Establish how the financial aid item type affects FM or IM need and enter rounding and remainder rules for the financial aid item type.
Equation Dtl (equation detail)	PKG_EQUATION_SEC	Click the Equation Detail link on the FA Item Type 2 page.	View the packaging equation attached to the Selection Criteria field. **Note:** The Equation Detail link only appears if you have a value selected in the Selection Criteria field.
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Define disbursement and anticipated aid rules. Update anticipated aid information, authorization for disbursement, and award letter information.
FA Item Type 4	ITEM_TYPE_FA_4	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4	Set minimum and maximum award limits by the type of term (term category) as required.
FA Item Type 5	ITEM_TYPE_FA_5	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5	Define default disbursement plans and split codes for each academic career, which enables you to enter data quickly on the award entry pages manually as well as for award rules on packaging plans.
FA Item Type 6	ITEM_TYP_FA_LN_FEE	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6	Attach loan fee codes for loan item types.

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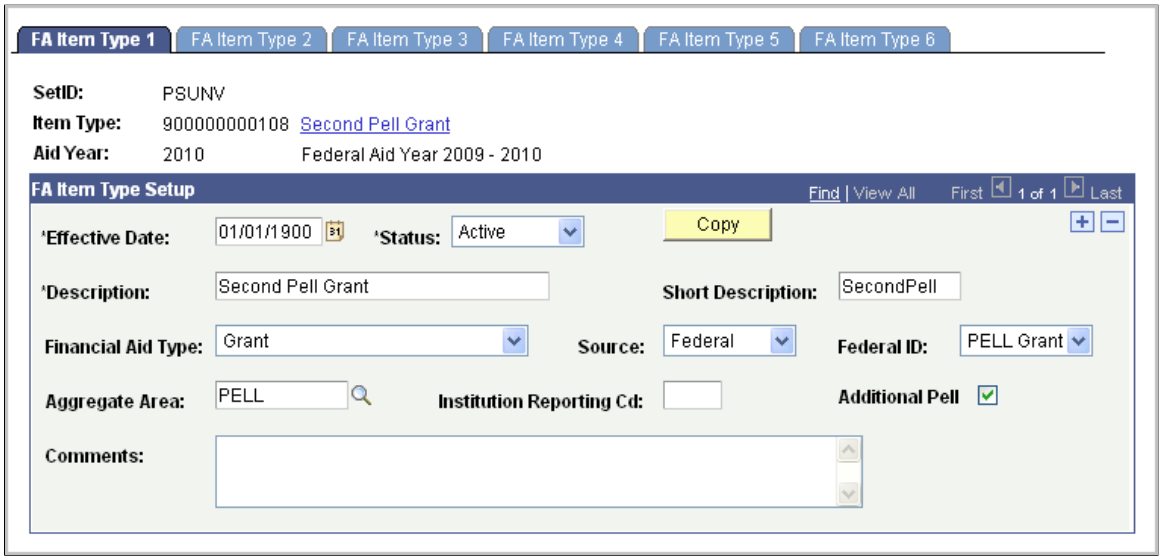
Defining Financial Aid Item Type Descriptions

Access the FA Item Type 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1).

Image: FA Item Type 1 page

This example illustrates the fields and controls on the FA Item Type 1 page. You can find definitions for the fields and controls later on this page.



Click the description of the item type to access the Item Type Detail page and view information from the item type table including the effective date and minimum and maximum transaction amounts.

Financial Aid Type Select the type of financial aid or category of funding.

Source Select the source of this financial aid funding.

Federal ID This field is available only if you select *Federal* as the source. Select the federal program associated with this item type. To have the correct federal program rules applied during financial aid processing, you must select the correct federal program in this field.

Values are: *GAANN* (Graduate Assistance in Areas of National Need), *Grad PLUS, HEAL, HPSL,IASA* (Iraq/Afghan Service Award, *LDS, Javits* (Jacob K. Javits Fellowship), *NIH* (National Institute of Health), *NSF* (National Science Foundation),*Nursing Ln* (nursing loan), *Other* (Other Federal Fund), *PCL, PELL Grant, PLUS, Perkins Ln* (Perkins Loan), *SEOG, Subsidized, TEACH, Unsubsidized,* or *Work Study.*

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Note: When packaging a student whose parent was killed in Iraq or Afghanistan in service of the United States armed forces after September 11, 2001:
- if the student is Pell Grant eligible, use Professional Judgment to award the student a maximum Pell Grant.
- if the student is *not* Pell Grant eligible, use any of the packaging methods (manual, auto, batch) to award the student an IASA in the amount of a maximum Pell Grant.

Aggregate Area

Select an aggregate area to associate with this item type if you want to limit or track aggregate aid for this financial aid item type. Each financial aid item type can be associated with only one aggregate area, but an aggregate area may be composed of several financial aid item types.

Institution Reporting Cd (institution reporting code)

Enter a user-defined institutional reporting code for this item type. This optional field is available for your institutional reporting needs.

MPN Required

This field appears when you select aFederal ID of *Perkins Ln.* Select to indicate that an MPN is required for the financial aid item type awarded to the student. The Perkins MPN electronic signature and print processes use this flag to determine which financial aid item types should be assessed if an MPN is required.

If selected, the financial aid disbursement authorization process requires a valid Perkins MPN before the award can be authorized and disbursed.

Additional Pell

Bundle 48

Added capability to award Year Round Pell beginning with the 2017–2018 Aid Year.

This check box appears when you select a Federal ID of *PELL Grant.* Select to indicate that this financial aid item type represents a Pell2 (Additional Pell Grant).

Note: It is recommended that you create new item types and corresponding financial aid item types when enabling the new Perkins MPN process. This enables you to track new Perkins MPNs and does not have a negative effect on those individuals who currently have a signed and valid Perkins MPN on file.

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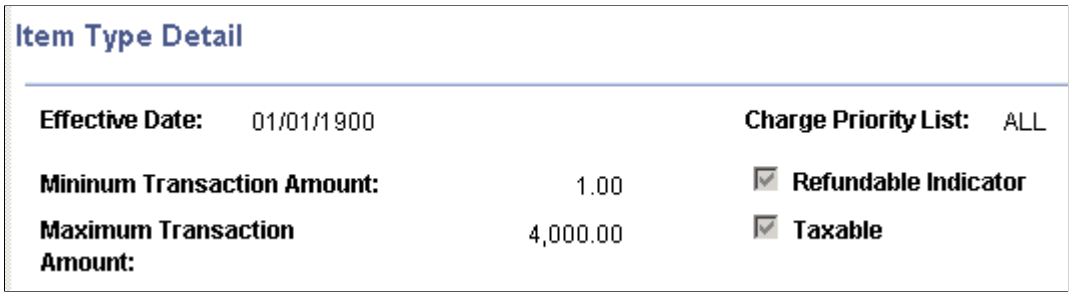
Viewing Item Type Detail

Access the Item Type Detail page (click the description of the item type on the FA Item Type 1 page).

Image: Item Type Detail page

This example illustrates the fields and controls on the Item Type Detail page. You can find definitions for the fields and controls later on this page.



Charge Priority List Identifies the charge priority list assigned to the item type. The system uses charge priority lists for financial aid item types that have payment application restrictions. Charge priority lists tell the system how to distribute excess funds and the types of charges towards which the item type can be applied.

Minimum Transaction Amount and **Maximum Transaction Amount** Displays the minimum and maximum annual amount established for this item type on the Item Type Amount Edits page.

Refundable Indicator Indicates whether the item type can be refunded later. This value comes from the Item Type - Miscellaneous Edits page.

Taxable PeopleSoft Payroll uses this field to calculate withholdings on awards of this item type. If you do not use PeopleSoft Payroll, clear this check box. This value comes from the Item Type - Miscellaneous Edits page.

Related Links

"Defining Charge Priority List Rules" (PeopleSoft Campus Solutions 9.2: Student Financials)

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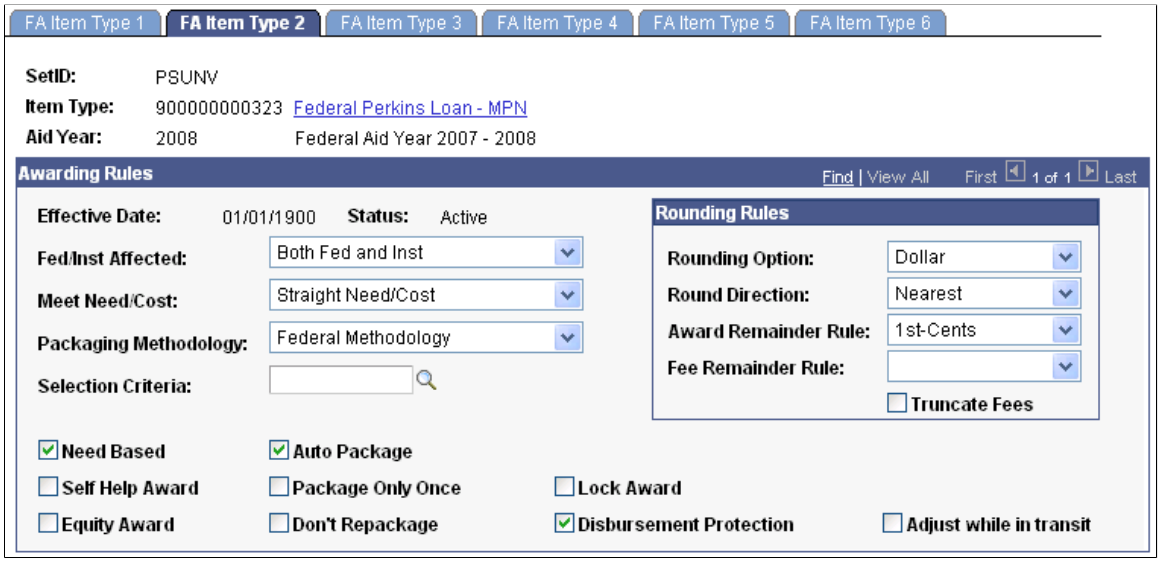
Defining Awarding and Rounding Rules

Access the FA Item Type 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2).

Image: FA Item Type 2 page

This example illustrates the fields and controls on the FA Item Type 2 page. You can find definitions for the fields and controls later on this page.



Awarding Rules

Fed/Inst Affected (federal/institutional affected)

Select which need this financial aid item type reduces.

Federal Only: This financial aid item type should reduce *only* federal need and not reduce institutional need.

Both Fed and Inst (both federal and institutional): This financial aid item type should reduce federal *and* institutional need. If your institution is using institutional awarding, select this value.

Meet Need/Cost

Select how need—based on your selection the Fed/Inst Affected field—is adjusted or reduced when you award this financial aid item type. Financial Aid maintains an unmet need balance (COA minus EFC minus aid awarded) and an unmet COA balance (COA minus aid awarded). Select a value to determine how awards of this financial aid item type affect these two balances:

Conditional: Indicates an award made without regard to budget or need if federal aid has not been awarded at the time of this award. However, if federal aid precedes this award, conditional awards behave like special need/cost awards.

Cost Only: The awarded amount affects only the unmet COA balance.

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Need Only: The awarded amount affects only the unmet need balance.

No Effect: The awarded amount does not affect the unmet need or unmet COA balances. Ensure that you understand the results before using this option.

Special Need/Cost: The Packaging process first determines whether unmet need exists. The system always reduces unmet need first. Then the process compares the remaining unmet COA against the student's EFC and awards up to the lesser of the two. This is the preferred attribute for unsubsidized Stafford and PLUS loans. Special need/cost aid reduces both the unmet need and unmet COA balances.

Straight Need/Cost: The awarded amount affects both the unmet need and unmet COA balances.

Packaging Methodology

Select the need—federal or institutional—the Packaging process should use to determine the amount for awards of this item type.

Federal Methodology: The Packaging process uses FM need to determine the award amount. FM need is the federal cost of attendance minus the student's FM EFC. Use this attribute for federal item types.

Institutional Methodology: The Packaging process uses IM need to determine the award amount. IM need is the institutional cost of attendance minus the student's IM EFC.

Note: If you use institutional methodology to estimate federal awards prior to the beginning of the federal awarding cycle (January 1st), selecting *Institutional Methodology* for federal awards enables a more realistic remaining need calculation. The remaining need calculation is more realistic because you have an institutional EFC but no federal EFC, and, therefore, the system uses IM need rather than FM need. You must effective date these federal financial aid item types so that beginning January 1, the packaging methodology is *Federal Methodology* to ensure the system uses FM need rather than IM need when awarding federal sources of aid.

Selection Criteria

To use an equation to select a population of students eligible to receive this item type, select the equation here. For example, you define a particular population of students to be awarded, such as students who have exceptional grade point averages and whose FM need is high. You create a packaging equation to select this student group, then link this student group to this item type by selecting the equation in this field.

The Equation Detail link appears only after you select an equation.

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See Viewing and Editing Equations.

Need Based

Select if need is considered when awarding this item type. This check box is used for reporting only.

Equity Award

Select to evaluate this financial aid item type as an equity award. Equity awards are considered to be "free money" to students such as grants or scholarships. Financial aid item types defined as equity awards adhere to the equity limit established in a packaging plan where the equity financial aid item type is a packaging rule.

See Defining Packaging Equity Limits and Offsets.

Auto Package

Select to have the financial aid item type available for selection in automated packaging—Auto Packaging and Mass Packaging. To have this financial aid item type available for use in packaging plans, you must select this check box.

Disbursement Protection

If this check box is selected, the Packaging process protects the disbursed portion of this financial aid item type from being reduced during repackaging sessions using any packaging method—Auto, Mass, or Manual Packaging. After you enable disbursement protection, an award of this financial aid item type cannot fall below the disbursed amount. When using manual packaging, especially for custom splits, the accept balance cannot be less than the disbursed balance on the Award Disbursement Detail page. The only way to reduce a disbursed amount when disbursement protection is active is to adjust the award on the Professional Judgement page.

Do not activate disbursement protection for Direct Loan financial aid item types. The treatment of Direct Loan adjustments is similar to the processing behavior invoked by disbursement protection.

Important! If you do not select this check box, disbursed amounts can be reduced and recalculated.

See Protecting Disbursements During Awarding.

Self Help Award

Select if this item type is work-study or a loan. This field is for informational or reporting purposes only.

Lock Award

Select if you want to lock awards of this financial aid item type automatically when awarding as part of a packaging plan. Locking an award prevents Auto and Mass Packaging from automatically canceling this award. All awards that you manually enter are automatically locked, whether this check box is selected or not.

See Using Auto Packaging and Auto Select Packaging.

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Package Only Once

Select to prevent this financial aid item type from being awarded more than once to the student for the aid year for the same career, even if the student is eligible to receive the award during a subsequent Packaging process.

For this check box to function properly, you must keep the following in mind:

To preserve the award made with the first instance of the financial aid item type, you must lock the first instance of the item type, selecting the Lock check box on the award entry page. If the first instance of the financial aid item type is not locked on the award entry page, the first instance of the financial aid item type is canceled and may be replaced by a future instance of the financial aid item type. Although a financial aid item type is not awarded more than once, unless you lock the first instance, it can be replaced by any future instances.

If the student has multiple careers across terms—Undergraduate for Term 1 and Graduate for Term 2—the Package Only Once check box does not prevent a financial aid item type from being awarded once for each career for the student. This could cause the financial aid item type to be awarded more than once in the aid year, but only once for each career. This is because the Package Only Once attribute is not evaluated when the first career's awards are passed to the second career as passive awards.

The Package Only Once attribute does not work if two instances of the financial aid item type exist within a packaging plan. This is because the first instance is not yet posted before the second instance is considered. In this case, both instances are awarded if the student is eligible.

Auto assign lowest sequence

This check box only appears if Meet Need/Cost is *Conditional.* Select to have awards of this financial aid item type automatically assigned the lowest possible sequence number in the student's financial aid package when you enter the conditional award on the Manual Student Packaging page *only.* For example, this check box is selected, and a student's package already contains three awards with sequence numbers of 10, 20, and 30. You enter a new conditional award, and the system assigns the conditional award a sequence number of 09. If the check box is cleared, the system assigns the new conditional award a sequence number of 40.

Automatically assigning conditional awards the lowest sequence number is useful when you have individuals outside the financial aid office (such as departmental office staff) entering conditional awards (like departmental scholarships) on the Manual Student Packaging page. The financial aid office staff

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can then review the student's package to see if the conditional award affects the student's need with other forms of aid.

If the conditional award entered by individuals outside the financial aid office is not automatically assigned the lowest sequence number, the student's need may be met before the Packaging process reaches the conditional award. Consequently, the student may not receive the conditional award.

Equation Detail

Click to access the Equation Summary page to view the packaging equation attached to the selection criteria.

Rounding Rules

Rounding Option

Select how you want awards of this financial aid item type rounded when rounding is necessary. Values are:

10 dollars: The Packaging process rounds award amounts to the nearest 10-dollar amount.

100 dollars: The Packaging process rounds award amounts to the nearest 100-dollar amount.

5 dollars: The Packaging process rounds award amounts to the nearest 5-dollar amount.

Dollar: The Packaging process rounds award amounts to the nearest dollar.

None: The Packaging process does not round award amounts for this financial aid item type.

Round Direction

Select the direction you want the Packaging process to use when rounding award amounts. If you select *None* as the rounding option, do not select a round direction.

Down to: The Packaging process truncates, or rounds, the award amount down to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option.

Nearest: The Packaging process rounds the award to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option. The process determines the dollar amount to which the award amount is closest, and then rounds up or down accordingly.

Up to: The Packaging process rounds the award amount up to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option.

Award Remainder Rule

When an award is rounded and split across disbursements, there can be an odd dollar or cent amount left over. The award remainder rule indicates where you want the Packaging process to place odd amounts.

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1st-Cents: If cents remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

1st-Dllrs (1st dollars): If dollars remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

Last-Cents: If cents remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Last-Dllrs (last dollars): If dollars remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Fee Remainder Rule

This field is available only for financial aid item types with a financial aid type of *Loan* on the FA Item Type 1 page. Select how the Packaging process handles remaining dollars or cents after loan fees have been applied to an award. You can either select a value in this field, or you can select the Truncate Fees check box, but not both.

First Disb − Cents: If cents remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

First Disb − Dollars: If dollars remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

Last Disb − Cents: If cents remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Last Disb − Dollars: If dollars remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Truncate Fees

Select to disregard any cents left over after the Packaging process has applied loan fees to the award amount. Use only for Direct Lending loans. You can select this check box, or you can select a value in the Fee Remainder Rule field, but not both.

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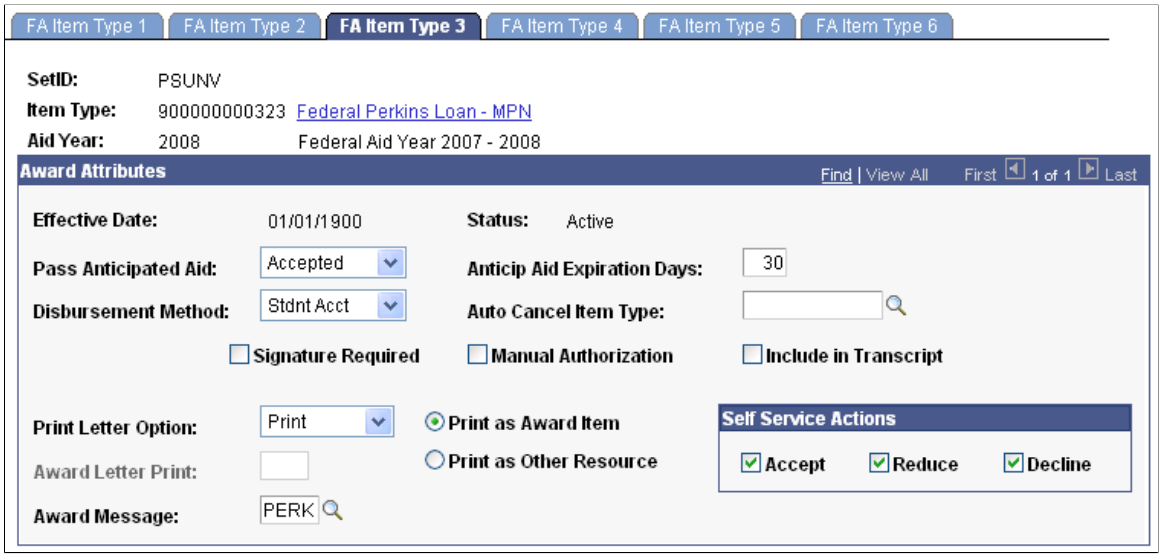
Defining Disbursement and Anticipated Aid

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).

Image: FA Item Type 3 page

This example illustrates the fields and controls on the FA Item Type 3 page. You can find definitions for the fields and controls later on this page.



Pass Anticipated Aid

Select when an award appears as anticipated aid in the student's Student Financials record. Awards appear as anticipated aid on the student's account when the status of the award matches the value in this field. For example, if you select *Accepted,* and an award of this financial aid item type has a status of *Accepted,* the award appears as anticipated aid on the student's bill. For loan awards, the net amount of the loan (award amount minus any loan fee adjustments) is displayed as anticipated aid.

Accepted: Awards of this financial aid item type with a status of accepted or authorized appear as anticipated aid.

Authorized: Awards of this financial aid item type with a status of authorized appear as anticipated aid.

None: Awards of this financial aid item type never appear as anticipated aid. For example, you do not want work study to appear as anticipated aid in this system because work study funds are not allocated to the student until the money is earned. Therefore, you select *None* for the work study financial aid item type.

Offered: Awards of this financial aid item type with a status of offered, accepted, or authorized appear as anticipated aid.

Anticip Aid Expiration Days (anticipated aid expiration days)

An expiration date accompanies each anticipated aid amount and enables you to "expire" a financial aid item type if the

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criteria for its awarding are not met by the date you assign. The number of days you enter in this field works with several other dates on the anticipated aid record to determine when to expire the anticipated aid. *Date* is the date the award becomes anticipated aid. *Apply Date* is the date you are requesting to apply the disbursement to the student's account. The expiration date is the later of the two calculated dates:

Date plus the number of anticipated aid expiration days

Or

Apply Date plus the number of anticipated aid expiration days

Print as Other Resource

In addition to veteran's benefits and Americorp benefits, you can identify another resource item type that prints as another resource under the award section of the FE FAN. The system does not count this other resource amount in the annual and term totals. It displays this amount in the estimated resources section of the FE FAN as other resources. Select to print the other resource item type under the award section on the FAN.

The following table provides an example of how the expiration date is determined—for the fall 2004 term, in this example:

Expiration Days	*Date*	*Apply Date*	*Expiration Date*
45	02/18/2004	08/14/2004	09/29/2004
45	07/30/2004	08/14/2004	09/29/2004
45	08/30/2004	08/14/2004	10/14/2004

Disbursement Method

Identify where Financial Aid transfers any disbursed financial aid amounts.

No: The funds are not disbursed into the student's Student Financials account because the student is paid directly. Work-study financial aid item types use this disbursement method.

Stdnt Acct (student account): The disbursed amount is transferred to the student's account in Student Financials.

Auto Cancel Item Type

If an existing award of a particular financial aid item type should be automatically canceled when an award of this financial aid item type is subsequently awarded manually on either the Student Aid Package page or the Manual Student Packaging page, enter the financial aid item type to be canceled in this field. This enables you to award using an *estimated* financial aid item type and then replace it with the *actual* financial aid item type when funds have been approved or certified. For example, you may have estimated a state grant and then replaced the award with an actual state grant award. This

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feature functions only during manual awarding. It does not work with auto packaging or mass packaging.

Signature Required

Select if you require a signature from the student for the student to receive this particular financial aid item type as part of an award. For example, you could use this for a loan where the student must sign a promissory note before any money is disbursed. This field is for informational purposes only; it has no effect on loan processing.

Manual Authorization

Select to disburse this financial aid item type using manual authorization. The system cannot authorize this financial aid item type for disbursement using the background authorization process if you select this check box. One use of this feature is for scholarships where you must review a roster or have checks that must be verified prior to authorization of the aid.

Include in Transcript

Indicates that the financial aid item type should appear on the financial aid transcript (FAT). This field is not supported because U.S. Department of Education no longer supports the FAT.

Print Letter Option

Select whether to print awards of this financial aid item type on the FAN letter or a custom letter, or to not print notification of the award at all.

Custom: Awards of this financial aid item type are printed in an institutionally configured standard letter of your choice rather than the delivered FAN letter. If you select this value, you must specify a standard letter code value in the Award Letter Print field.

As an example, you may want to generate a specific scholarship letter for the JP Memorial award recipients. The custom option enables you to modify the letter by inserting the JP Memorial awarded amount within the letter, which you must specify by its standard letter code in the Award Letter Print field.

Never: Awards of this financial aid item type are never printed in the FAN letter or an institutionally modified letter.

Print: Awards of this financial aid item type are printed on the FAN letter. You must also indicate whether awards of this financial aid item type should be treated as award items or as other resources—such as student contribution and parent contribution—using the Print as Award Item and Other Resource options.

Print as Award Item

Available only if you select *Print* in the Print Letter Option field. Select to have awards of this financial aid item type included in the total aid offered amount on the FAN letter and listed as awards.

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Other Resource

Available only if you select *Print* in the Print Letter Option field. Select to have awards of this financial aid item type considered as resources and included in the other resources total on the FAN letter, but not listed as awards.

Award Letter Print

Available only if you select *Custom* in the Print Letter Option field. Select the standard letter code of the letter to modify using the award amount.

Award Message

(Optional) To have a specific award message print on an award notification or a custom letter for awards of this financial aid item type, select the award message in this field. The award messages available for selection are defined on the Setting Up Award Messages page.

Related Links

"Defining Letter Codes" (PeopleSoft Campus Solutions 9.2: Campus Community)

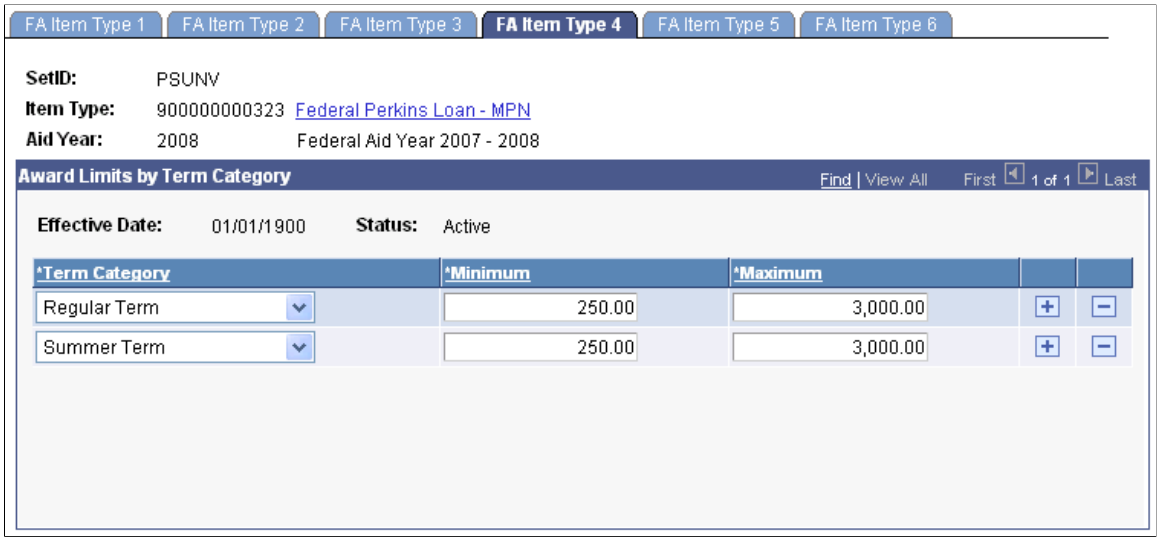
"Setting Up Institution Sets" (PeopleSoft Campus Solutions 9.2: Self Service)

Setting Term Minimum and Maximum Award Limits

Access the FA Item Type 4 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4).

Image: FA Item Type 4 page

This example illustrates the fields and controls on the FA Item Type 4 page. You can find definitions for the fields and controls later on this page.



Term Category

Select the term type for which you are specifying minimum and maximum award limits. The automated Packaging process uses the financial aid item type term limits from this page, annual item type limits from the Item Type page, fiscal limits, financial aid item type annual limits from the packaging plan, and, if defined, any aggregate area limits to determine the correct

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amount to award. Term category values are delivered with your system as translate values. These values are used extensively in Student Records. Coordinate any revision of these values with student records staff.

Insert additional rows to add more term categories.

Minimum and **Maximum**

Enter the minimum and maximum award limits for terms of the associated term category. Remember that this amount is per term, not per aid year. To ensure that the Packaging process processes without fault, minimums should not be less than 1.00 USD. You must set this field to a nonzero amount for your gap financial aid item types.

If the maximum award limit is 400.00 USD (for a term), the item type limit is 1,000.00 USD (for the aid year), and your institution has two semester terms, the maximum award for this financial aid item type is 800.00 USD (400.00 USD for each term). If your institution has three quarter terms, the maximum amount based on the term maximum amount is 1,200.00 USD (400.00 USD for three terms) but this exceeds the item type limit for the aid year. The actual maximum for this financial aid item type is 1,000.00 USD—the item type limit for the aid year. The financial aid item type term maximum cannot override the item type maximum.

Related Links

"Defining Terms" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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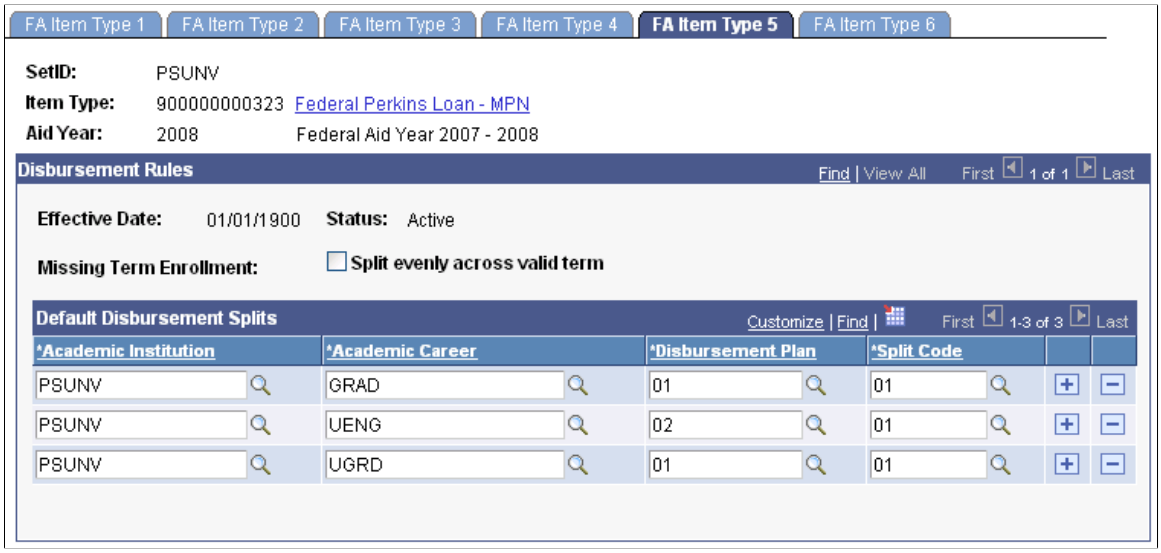
Defining Default Disbursement Plans and Split Codes

Access the FA Item Type 5 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5).

Image: FA Item Type 5 page

This example illustrates the fields and controls on the FA Item Type 5 page. You can find definitions for the fields and controls later on this page.



Disbursement Rules

Disbursement plans determine the disbursements across terms, award period, and aid year, but students may not necessarily attend all terms defined for the disbursement plan. The Missing Term Enrollment field specifies if disbursements should be split evenly among the remaining terms for which the student is actually enrolled. Select the Split evenly across valid term check box to have the award split among the remaining enrolled terms for the student. For example, if the disbursement plan is for fall, winter, and spring quarters, but the student is only enrolled for fall and spring with the Split evenly across valid term check box selected, the award amount is split evenly between the fall and spring terms.

Clear the Split evenly across valid term check box to have the award amount split according to the relative percentages of the valid terms. For example, a disbursement plan calls for a split of 20%/40%/40% among three terms, but only the first two terms are valid for the student. To determine the relative percentages of the first two terms, the system first adds the disbursement split percentages for the two valid terms (20% + 40% = 60%). Then the system divides each term's original percentage by the new total percentage (60%). So the first term has a relative percentage of 33.33% (20% / 60% = .3333) and the second term has a relative percentage of 66.37% (40% / 60% = .6667). The Packaging process then determines each term's award amount by multiplying the total award amount by each term's relative percentage.

Note: The Split evenly across valid term check box is not available for Pell Grants because Pell amounts for each term are derived at the term level based on financial aid term data, federal EFC, and Pell COA and cannot be just distributed evenly among the valid enrollment terms.

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Note: Select a Default Disbursement Plan that encompasses *all* terms (Academic and Non-Standard) in which the student may receive a Pell Grant. Although Packaging does not use the Split Code specified here when calculating Pell Grant, a default Split Code is required.

See Calculating Pell Grants

Default Disbursement Splits

Defining default disbursement plans and split codes decreases the amount of data entry during the establishment of packaging plans and on the award entry pages. You can establish different default disbursement plans and split codes for each career. Insert a row for additional institution/career combinations.

Disbursement Plan Enter the default disbursement plan for the financial aid item type when awarded for the selected career and institution.

Split Code Enter the default split code for the financial aid item type when awarded for the selected career and institution.

Related Links

Defining Default Disbursement Plans and Split Codes

Attaching Loan Fees

Access the FA Item Type 6 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6).

Image: FA Item Type 6 page

This example illustrates the fields and controls on the FA Item Type 6 page. You can find definitions for the fields and controls later on this page.

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Loan Program

If the loan financial aid item type is associated with an aggregate area on the FA Item Type 1 page, the Loan Program and Loan Interest Attribute fields display the values you selected in the corresponding fields on the Aggregate Aid Limit page for the associated aggregate area. You cannot change these values on this page. If the loan financial aid item type is not associated with an aggregate area, you can select the appropriate value for these two fields on this page.

Loan Program Enter the type of loan program tracked by the aggregate area.

Loan Interest Attribute Enter whether the loan servicer pays the interest on the loan.

Subsidized: The loan servicer pays the interest on the loan while the student is in school, during the repayment grace period, and during any deferment periods.

Unsubsidized: The loan servicer does not pay the interest on the loan.

Loan Fees

Enter the loan fees that you want to associate with the loan financial aid item type, including Direct Loan interest rebate fees. You must set up loan fees on the Loan Fee Table page before assigning loan fees to a financial aid item type. The Packaging process uses the loan fees that you assign to calculate the loan fee amount (based on the awarded amount) and to determine from which disbursements to subtract the loan fee amount. Anticipated aid and anticipated disbursements display the net amount of the award—the total award amount less the loan fee amount, plus a Direct Loan interest rebate if eligible. You can add as many loan fees as needed to reflect all of the loan fee types that apply to this financial aid item type. When you enter a loan fee, the system populates the Loan Fee Type, Loan Fee Rule, Loan Fee Option, Fee Percent, and Flat Fee fields with the corresponding values set up on the Loan Fee Table page.

Note: To properly calculate the net financial aid amount that appears on a student's billing statement, you must attach the appropriate loan fees to the financial aid item type.

See Setting Up Loan Fees.

Calculating Actual Loan Fees for CommonLine Loans

For some loan financial aid item types, the estimated loan fees determined during the Packaging process may not reflect the actual fees charged by the loan servicers. Loans processed using the CommonLine loan business process can have the loan fees in the student's package automatically updated with the actual loan fee amounts determined by the loan servicer. The estimated loan fees are automatically updated when the loan is guaranteed by the loan servicer and a CommonLine application response record is processed for the student. If you adjust the student's loan award after the loan fees are updated, the Packaging process uses the actual loan fee rate used by the loan servicer (instead of the loan fees assigned to the financial aid item type) to calculate loan fees for the new award amount.

See Reviewing CL 4 Status and Phase Codes.

Calculating Direct Loan Interest Rebate

You must insert the Direct Loan rebate loan fee you set up on the Loan Fee Table page on the FA Item Type 6 page for all Direct Loan financial aid item types. The up-front interest rebate amount of 1.5

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percent of the gross disbursement is calculated at the disbursement level for each Direct Subsidized, Direct Unsubsidized, and Direct PLUS loan. The interest rebate amount is added after the 3 percent loan fee is subtracted from the gross disbursement amount. For example, a student receives a Direct Loan of 1,000.00 USD for the fall 2004 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent interest rebate of 15.00 USD is added back into the loan.

The loan fee and interest rebate amounts are truncated. This means the system removes cents and uses the remaining whole dollar amount. The dollar value is not rounded up or down. When calculating the combined fee and interest rebate amount and the loan fee amount, the process carries the result out to three decimal places.

Note: Gross disbursement calculations do not change with the interest rebate implementation. Dollar figures are rounded to the nearest dollar. All disbursements are equal except in cases where a variance may be applied to the last disbursement.

Note: Direct Loans with a zero rebate or no longer eligible for a rebate must still have a Loan Fee Type defined as a ‘rebate’ added as an attribute on the Financial Aid Item Type setup.

The following table uses a 3,500.00 USD loan amount and is an example of determining combined fee and interest rebate amount, disbursement net amount, loan fee amount, and interest rebate amount for three disbursements:

Disbursement Number	***Gross Disbursement Amount***	***Step 1 — Com Fee/ Interest Rebate Amount***	***Step 2 — Truncated Com Fee/ Interest Rebate Amount***	***Step 3 — Disbursement Net Amount***	***Step 4 — Loan Fee Amount***	***Step 5 — Truncated Loan Fee Amount***	***Step 6 — Interest Rebate Amount***
1	1167 USD	1167 x (.03 - .015) = 17.505	17	1167 - 17 = 1150	1167 x .03 = 35.01	35	1150 - (1167 - 35) = 18
2	1167 USD	1167 x (.03 - .015) = 17.505	17	1167 - 17 = 1150	1167 x .03 = 35.01	35	1150 - (1167 - 35) = 18
3	1166 USD	1166 x (.03 - .015) = 17.49	17	1166 - 17 = 1149	1166 x .03 = 34.98	34	1149 - (1166 - 34) = 17
Totals	3500 USD			3449 USD		104 USD	53 USD

Related Links

Setting Up Loan Fees

Defining Gap Financial Aid Item Types

Use gap financial aid item types to establish an amount of financial aid that is not met at a particular point in time by a packaging plan.

To create a gap financial aid item type:

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1. Verify that a gap item type exists in the Item Types component (Set Up SACR, Product Related, Student Financials, Item Types).

   If you need to create a gap item type, define only the Initial Setup page. When you add the item type, you could use a series of 9s as the ID to distinguish this item type from other item types because a gap item type is unique – not shown on award letters and not part of the student's award record. On the Initial Setup page, enter a description, short description, and any applicable keywords (based on your institution's keyword scheme). Then clear the GL Interface Required check box and select the Financial Aid option in the Classification group box.

2. Add a new financial aid item type, selecting the gap item type in the add dialog box.

3. Complete the fields in the Financial Aid Item Types component as you do for any other financial aid item type.

   Keep in mind that when you use the gap in a packaging plan, the Packaging process treats the gap financial aid item type as it does any other financial aid item type, honoring the values and rules that you establish in the Financial Aid Item Types component and the percentage of the Total Need field in the packaging plan. For example, a packaging plan's FM percentage of Total Need field has a value of 50 percent, the gap financial aid item type has a term limit of 5,000.00 USD, and you have a student with an FM need of 8,000.00 USD. The Packaging process assigns a gap of only 4,000.00 USD to the student, because that is 50 percent of the student's FM need, even though this is less than the term limit.

4. Set your default gap financial aid item type at the installation level on the Financial Aid Defaults page.

   You can also set default gap financial aid item types at the academic career or academic program level, using aid processing rule sets.

   See Establishing Defaults.

Budgeting Fiscal Limits

To set up fiscal limits, use the Fiscal Item Types component (ITEM_TYP_FISCAL).

This section provides an overview of fiscal limits and discusses how to:

- Assign fiscal limits to financial aid item types.
- Review fiscal fund status.
- Reviewing fiscal fund notes.
- Review fiscal limits for aggregate areas.

Understanding Fiscal Limits

Use the Fiscal Item Types component to set up your financial aid item type fiscal detail. These are the fiscal amounts that you want Financial Aid to adhere to when awarding and disbursing the financial aid item type. You must set up fiscal limits for each financial aid item type—if a financial aid item type does not have fiscal limits, you cannot award it.

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If you have not set up fiscal limits:

- During manual packaging you receive message 9531: "There is no entry in the ITEM_TYPE_FISCL table for the Item Type associated with this award.

  Please check Set Up SACR, Product Related, Awards, Fiscal Item Types to determine whether Fiscal Limits have been defined for the Item Type being packaged. If Fiscal Limits have not been defined, please add them. If Fiscal Limits have been defined, please contact your System Administrator for assistance."

- During Auto or Mass Packaging, you receive message 9532: "There is no entry in the ITEM_TYPE_FISCL table for the Item Type associated with this Packaging Rule.

  Please check Set Up SACR, Product Related, Awards, Fiscal Item Types to determine whether Fiscal Limits have been defined for the Item Type being packaged. If Fiscal Limits have not been defined, please add them. If Fiscal Limits have been defined, please contact your System Administrator for assistance."

Pages Used to Budget Fiscal Limits

Page Name	***Definition Name***	***Navigation***	***Usage***
Assign Fiscal Limits	ITEM_TYPE_FISCL	Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Assign Fiscal Limits	Assign fiscal limits to financial aid item types. Define the maximum amount of money that can be offered, accepted, and disbursed for a financial aid item type.
Fiscal Item Type Audit	SFA_IT_FISCAL_SEC	Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Assign Fiscal Limits, click Audit Fields link.	Click this link to view details about changes to the Assign Fiscal Limits page.
Fiscal Fund Status	ITEM_TYPE_FISCL2	Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Status	Review the status of a financial aid item type's fiscal fund.
Fiscal Fund Notes	ITEM_TYPE_FISCL3	Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Notes	Enter comments regarding a fund for informational use by your financial aid staff.
Fiscal Aggregate Summary	AGGR_AREA_FISCL	Financial Aid, Fund Management, Fiscal Aggregate Summary, Fiscal Aggregate Summary	Review detailed fiscal information for an aggregate area. You cannot enter budgeted amounts for an aggregate area; the values on this page are the sum of all financial aid item types associated with this aggregate area.

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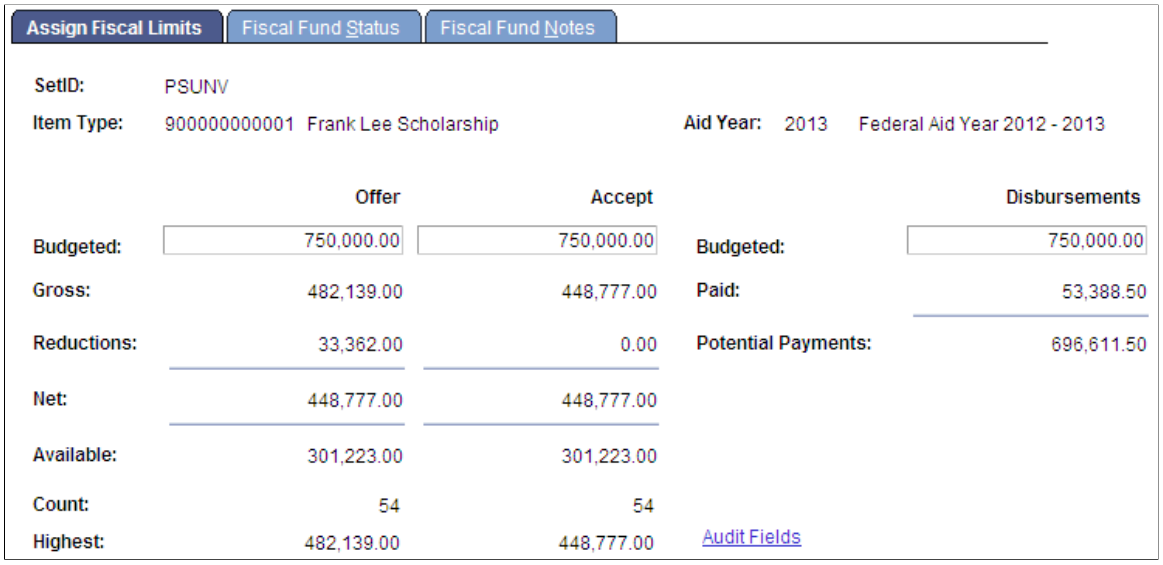
Assigning Fiscal Limits to Financial Aid Item Types

Access the Assign Fiscal Limits page (Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Assign Fiscal Limits).

Image: Assign Fiscal Limits page

This example illustrates the fields and controls on the Assign Fiscal Limits page. You can find definitions for the fields and controls later on this page.



Budgeted − Offer The maximum source of funding you can offer for this financial aid item type.

Budgeted − Accept The maximum source of funding that can be accepted for this financial aid item type.

Gross − Offer The sum of all gross offered amounts from each student who received this financial aid item type award. For example, if the student were initially offered 800.00 USD, then 800.00 USD would be added to this sum. If the student was later offered 300.00, 800.00 USD would still be the gross offered amount.

Gross − Accept The sum of all gross accepted amounts from each student who received this financial aid item type award. For example, if the student initially accepted 800.00 USD, then 800.00 USD would be added to this sum. If the student later accepted 300.00, 800.00 USD would still be the gross accepted amount.

Reductions − Offer The sum of the reduced offer amounts from each student for this financial aid item type. If a student is offered 800.00 USD for this item type and later the offer is reduced to 600.00 USD, then 200.00 USD is added to the sum. If the award is reduced again for the student, then the additional reduction amount is added to the sum.

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Reductions − Accept The sum of the reduced accept amounts from each student for this financial aid item type.

Net − Offer The sum of the current offer amounts for this financial aid item type.

Net − Accept The sum of the current accept amounts for this financial aid item type.

Available − Offer The remaining source of funding available to award students for this financial aid item type. Equals the Budgeted − Offer minus the Net − Offer.

Available − Accept The remaining amount available for students to accept for this financial aid item type. Equals the Budgeted − Accept minus the Net − Accept.

Count − Offer The number of students (unduplicated) who have been offered an award of this financial aid item type. Does not include students that have canceled or declined awards.

Count − Accept The number of students (unduplicated) who have accepted an award of this financial aid item type. Does not include students that have canceled or declined awards.

Highest − Offer The sum of all the highest offer amounts from each student who received this financial aid item type award. If a student were initially offered 500.00 USD, then 500.00 USD would be added to this sum. If the student was later offered 800.00 USD, then 500.00 USD would be subtracted and 800.00 USD would be added to the sum because it is the highest amount offered to the student. This amount enables you to know what your maximum total offer amount is for this financial aid item type.

Highest − Accept The sum of all the highest accepted amounts from each student who received this item type award. This amount enables you to know what your maximum total accepted amount is for this financial aid item type.

Here is an example of how the amounts in the Gross, Reductions, Net, and Highest columns are calculated. This example tracks only one student. On the page itself, the values shown are added to similar values for all other students who are awarded the financial aid item type.

Award Activity	*Gross*	*Reductions*	*Net*	*Highest*
Offer 1,000 USD	1,000 USD	0 USD	1,000 USD	1,000 USD
Cancel Award	1,000 USD	1,000 USD	0 USD	1,000 USD
Increase to 200 USD	1,200 USD	1,000 USD	200 USD	1,000 USD
Increase to 1,000 USD	2,000 USD	1,000 USD	1,000 USD	1,000 USD
Reduce to 500 USD	2,000 USD	1,500 USD	500 USD	1,000 USD

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Award Activity	*Gross*	*Reductions*	*Net*	*Highest*
Cancel award offer	2,000 USD	2,000 USD	0 USD	1,000 USD

Budgeted − Disbursements The amount you want to budget for the total disbursements of this financial aid item type.

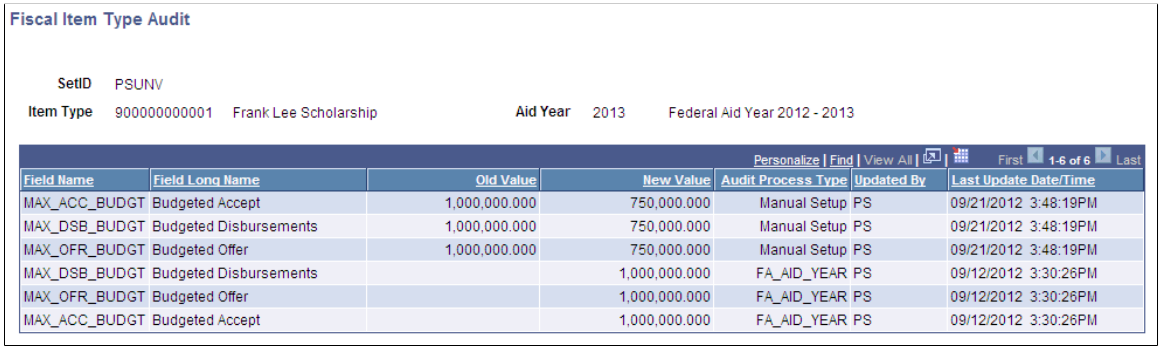
Paid − Disbursements The amount that has been authorized and disbursed to students from this financial aid item type.

Potential Payments − Disbursements The remaining amount available to disburse to students for this financial aid item type. Equals the Budgeted − Disbursements minus the Paid − Disbursements.

Audit Fields Click this link to view the Fiscal Item Type Audit page.

Image: Fiscal Item Type Audit page

This example illustrates the fields on the Fiscal Item Type Audit page.



Fiscal Item Type Audit

SetID PSUNV

Item Type 900000000001 Frank Lee Scholarship Aid Year 2013 Federal Aid Year 2012 - 2013

Personalize | Find | View All | First 1-6 of 6 Last

Field Name	Field Long Name	Old Value	New Value	Audit Process Type	Updated By	Last Update Date/Time
MAX_ACC_BUDGT	Budgeted Accept	1,000,000.000	750,000.000	Manual Setup	PS	09/21/2012 3:48:19PM
MAX_DSB_BUDGT	Budgeted Disbursements	1,000,000.000	750,000.000	Manual Setup	PS	09/21/2012 3:48:19PM
MAX_OFR_BUDGT	Budgeted Offer	1,000,000.000	750,000.000	Manual Setup	PS	09/21/2012 3:48:19PM
MAX_DSB_BUDGT	Budgeted Disbursements		1,000,000.000	FA_AID_YEAR	PS	09/12/2012 3:30:26PM
MAX_OFR_BUDGT	Budgeted Offer		1,000,000.000	FA_AID_YEAR	PS	09/12/2012 3:30:26PM
MAX_ACC_BUDGT	Budgeted Accept		1,000,000.000	FA_AID_YEAR	PS	09/12/2012 3:30:26PM

Warning! Once the Fiscal Item Type Audit Trail has been established with manual changes to the Budgeted Offer, Accept or Disbursement balance, running the Aid Year Rollover process (Audit Process Type of *FA_AID_YEAR*) with the "Override Aid Year" attribute selected *deletes all of the existing Audit Trail rows* and newly creates the Fiscal Item Type Audit Trail.
Because the Fiscal Item Type Audit Trail is a child table to the ITEM_TYP_FISCL table, Aid Year Rollover deletes the parent ITEM_TYP_FISCL table as part of the override action. The effect is that all previous audit trail entries are lost. If you wish to retain the audit trail entries before running subsequent Aid Year Rollover jobs, consider downloading the Fiscal Item Type Audit Trail entries contained in the grid into an Excel spreadsheet for retention.

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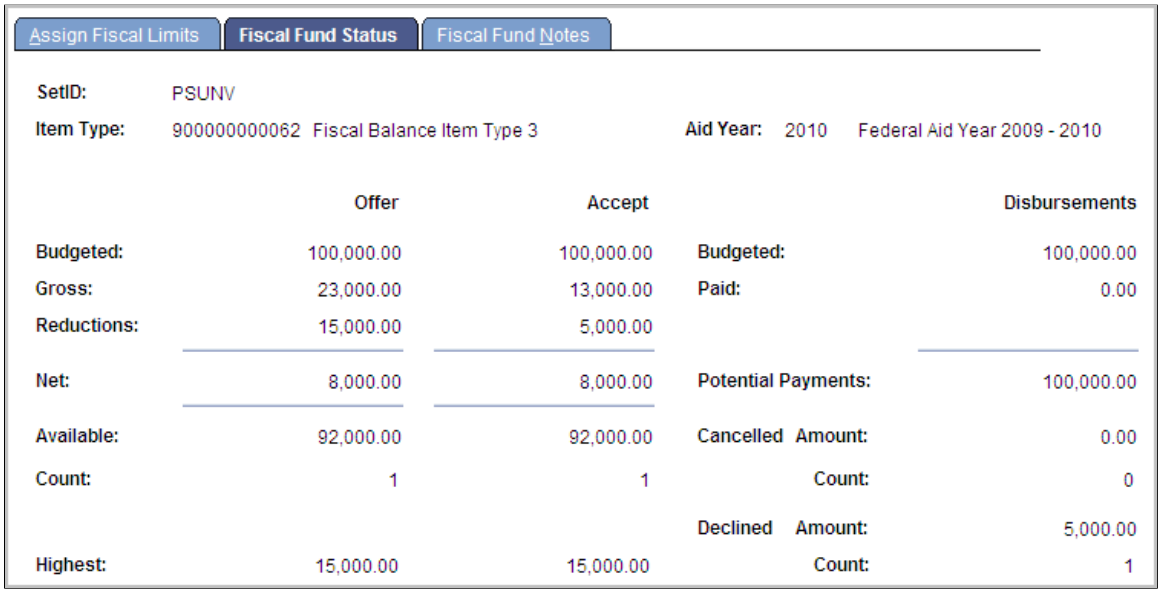
Reviewing Fiscal Fund Status

Access the Fiscal Fund Status page (Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Status).

Image: Fiscal Fund Status page

This example illustrates the fields and controls on the Fiscal Fund Status page. You can find definitions for the fields and controls later on this page.



Assign Fiscal Limits | Fiscal Fund Status | Fiscal Fund Notes

SetID: PSUNV

Item Type: 900000000062 Fiscal Balance Item Type 3 Aid Year: 2010 Federal Aid Year 2009 - 2010

	Offer	Accept		Disbursements
Budgeted:	100,000.00	100,000.00	Budgeted:	100,000.00
Gross:	23,000.00	13,000.00	Paid:	0.00
Reductions:	15,000.00	5,000.00		
Net:	8,000.00	8,000.00	Potential Payments:	100,000.00
Available:	92,000.00	92,000.00	Cancelled Amount:	0.00
Count:	1	1	Count:	0
			Declined Amount:	5,000.00
Highest:	15,000.00	15,000.00	Count:	1

Give financial aid staff who need to know this information but who you do not want to have the ability to change the budgeted amount for a fiscal fund access to this page instead of the Assign Fiscal Limits page.

Cancelled Amount Displays the sum of the awards of this financial aid item type that have been cancelled.

Cancelled Count Displays the number of students that have cancelled awards of this financial aid item type.

Declined Amount Displays the sum of the awards of this financial aid item type that have been declined.

Declined Count Displays the number of students that have declined awards of this financial aid item type.

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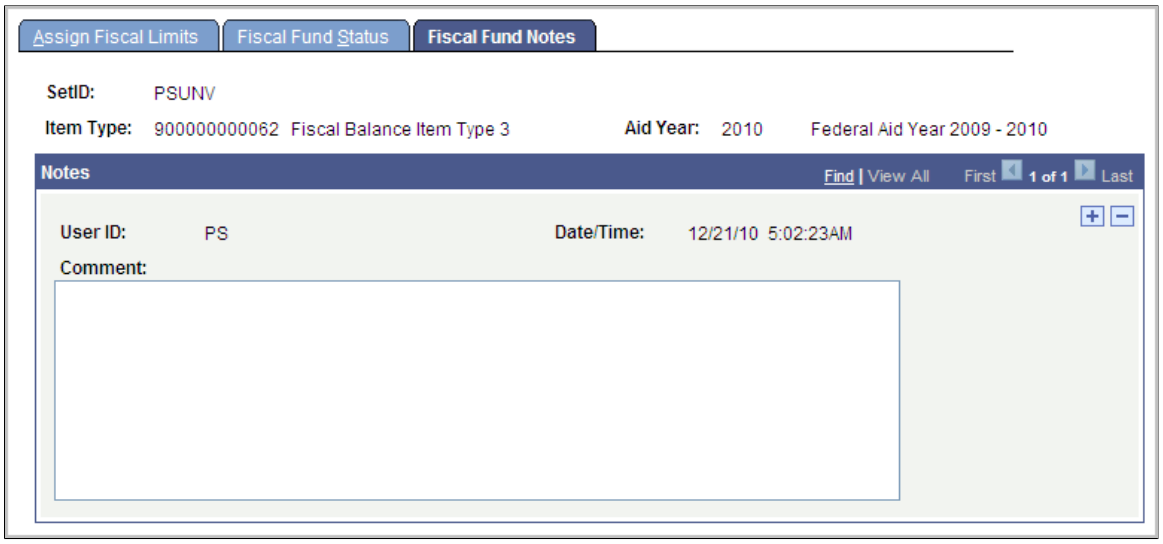
Reviewing Fiscal Fund Notes

Access the Fiscal Fund Notes page (Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Notes).

Image: Fiscal Fund Notes page

This example illustrates the fields and controls on the Fiscal Fund Notes page.



Enter comments regarding a fund for informational use by your financial aid staff.

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Reviewing Fiscal Limits for Aggregate Areas

Access the Fiscal Aggregate Summary page (Financial Aid, Fund Management, Fiscal Aggregate Summary, Fiscal Aggregate Summary).

Image: Fiscal Aggregate Summary page

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

Fiscal Aggregate Summary

SetID: PSUNV Aggregate Area: STAFFORD Stafford Loan - Subsidized

Find | View All First 1 of 1 Last

Aid Year: 2008 Federal Aid Year 2007 - 2008

	Disbursements		Max to Offer	Max to Accept
Budgeted:	$14,999,999.00	Budgeted:	$14,999,999.00	$14,999,999.00
Paid:	$32,162.00	Gross:	$170,250.00	$170,250.00
Potential Payments:	$14,967,837.00	Reductions:	$0.00	$0.00
		Net:	$170,250.00	$170,250.00
		Available:	$14,829,749.00	$14,829,749.00
		Count:	50	50

	Authorized		Cancelled	Declined
Budgeted:	$0.00	Amount:	$0.00	$0.00
Net:	$0.00	Count:	0	0

Budgeted − Authorized The maximum source of funding that can be authorized for this aggregate area.

Net − Authorized The sum of the current authorized amounts for this financial aid item type. When this amount equals the budgeted amount, no further awards for this aggregate area can be authorized.

Packaging for Pell Grant Eligibility

Beginning with Aid Year 2016 (Award Year 2015-2016), you can import the Department of Education's published Federal Pell Grant (Regular and Alternate) Payment and Disbursement Schedules directly into your system to evaluate Pell awards.

This section discusses how to:

- Load the Department of Education's published Federal Pell Grant Payment and Disbursement schedules into the Pell Table Enablement (PTE) tables.
- Compare the Department of Education's published Pell schedules with the existing values in the system’s PTE tables.

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Pages Used to Package for Pell Grant Eligibility

Page Name	*Definition Name*	*Navigation*	*Usage*
Pell Table Enablement Load Run Control	SFA_PELL_SCH	Set Up SACR, Product Related, Financial Aid, Awards, Pell Table Load	Import Federal Pell Grant (Regular and Alternate) Payment and Disbursement Schedules as MS Excel files (*.xlsx) to award Pell Grants.
Pell Table Comparison Run Control	SFA_PELL_XML	Set Up SACR, Product Related, Financial Aid, Awards, Pell Table Compare	Identify in *.xml format, data differences between the schedules in the system's Pell Table Enablement tables and those published by the Department of Education.

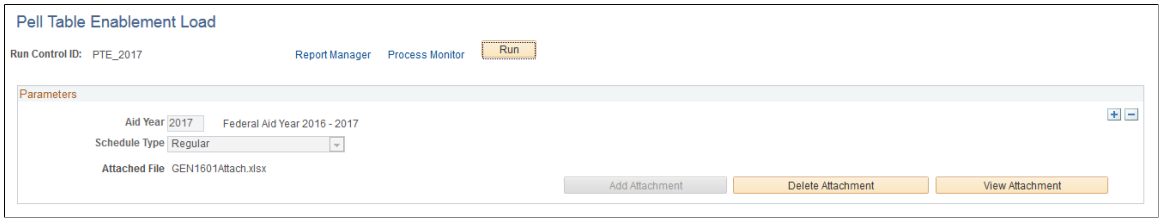
Loading Pell Schedules into Pell Table Enablement Tables

Navigation

Access the Pell Table Enablement Load Run Control page Set Up SACR, Product Related, Financial Aid , Awards, Pell Table Load

Image: Pell Table Enablement Load Run Conrol Page

This example illustrates the fields and controls on the Pell Table Enablement Load Run Conrol Page. You can find definitions for the fields and controls later on this page.



Aid Year

Select the Aid Year for which to load the Department of Education's published Pell Grant Payment and Disbursement Schedules into the system. The earliest permissible Aid Year is 2016. Attempting to load an earlier Aid Year triggers an error message.

Note: Oracle has loaded both the Regular and Alternate Pell Grant Payment and Disbursement Schedules for Aid Year 2016 (Award Year 2015-2016). Beginning with Aid Year 2017 (Award Year 2016-2017), if you choose to use the Pell Table Enablement feature when awarding Pell Grants, you will need to load the published schedules from the Department of Education.

Schedule Type

Select the schedule type.

Regular: Regular Pell Grant Payment and Disbursement schedules.

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Alternate: Career Pathway Alternate Pell Grant Payment and Disbursement schedules.

Attachment

Use the standard Add, Delete, and View Attachment buttons to upload, delete, or view the *.xlsx file's corresponding Pell Schedule.

Attach only MS Excel (*.xlsx) versions of Federal Pell Grant Payment and Disbursement Schedules for loading to the Pell Table Enablement tables: SFA_PELL_SCHED (regular schedules) and SFA_PELL_ALT (alternate schedules). PDF formats are not supported.

Note: The file name for the attachment has a 64-character limit. Edit the file name accordingly if the schedule file name published by the Department of Education exceeds the limit.

If the Pell tables contain data for a given Aid Year/Schedule Type combination, and you load another instance of that combination, the system deletes the existing data and repopulates the PTE tables with the contents of the most recent upload.

This functionality allows you to update the system's Pell tables for a given Aid Year. For example, if during the award year, Congress updates already published schedules to reflect revised Pell award amounts, you need to upload the revised schedules into the system, and the Packaging routines use the revised schedules in its evaluation and awarding of students.

Note: For Aid Year 2016, the system's Pell Table Enablement tables have been preloaded with the Award Year 2015-2016 Federal Pell Grant Payment and Disbursement Schedules (both Regular and Alternate). Therefore, simply select the Use Pell Table attribute on the Financial Aid Installation setup table to award Aid Year 2016 Pell grants.

Warning! Do not alter, in any manner, the content of the published Excel spreadsheets containing the Department of Education's Federal Pell Grant (Regular and Alternate) Payment and Disbursement Schedules. The Pell Table Enablement Load program logic interrogates specific values in each of the schedules—any alteration in content may result in failure to load or an incorrect load.

Comparing Published Pell Schedules with Existing Pell Table Data

Use this comparison routine to compare the published schedules against existing system data, review the results for any mismatches, and update the system tables with the source schedules, if needed. If neither the schedules nor the PTE tables have been altered, these values should always match.

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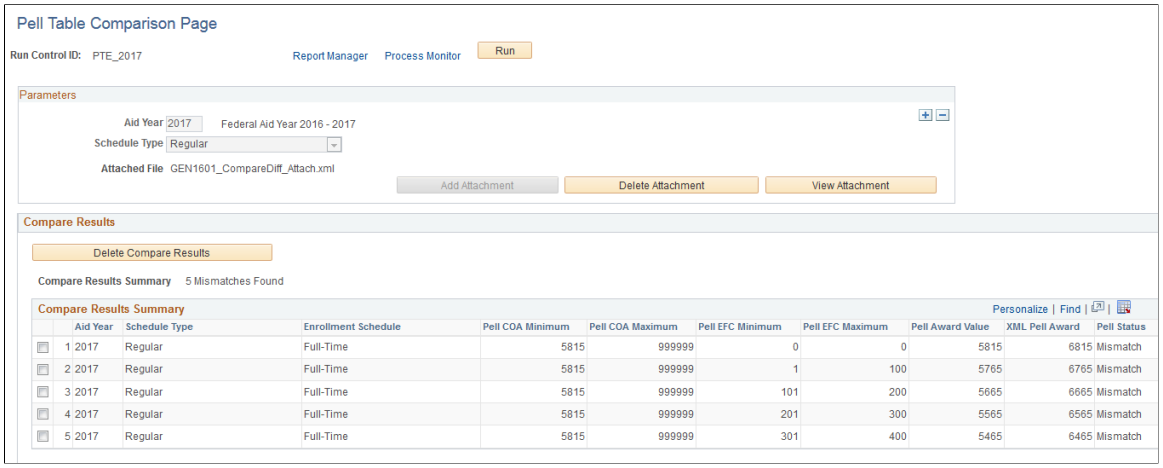
Navigation

Access the Pell Table Comparison Run Control page Set Up SACR, Product Related, Financial Aid, Awards, Pell Table Compare.

Image: Pell Table Comparison Run Control Page

This example illustrates the fields and controls on the Pell Table Comparison Run Control Page. You can find definitions for the fields and controls later on this page.



Aid Year

Select the Aid Year for which to perform a comparison of the Department of Education's published Federal Pell Grant Payment and Disbursement Schedules against the system's existing PTE data. The earliest permissible Aid Year is 2016. Attempting to load an earlier Aid Year triggers an error message.

Schedule Type

Select the schedule type.

Regular: Regular Pell Grant Payment and Disbursement schedules.

Alternate: Career Pathway Alternate Pell Grant Payment and Disbursement schedules.

Attachment

To perform a comparison, first save a copy of the spreadsheet as an XML file type in MS Excel. Use the standard Add, Delete, and View Attachment buttons to upload, delete, or view the (converted) XML file's corresponding Pell Schedule.

Note: Ensure that the file name of the uploaded corresponding XML schedule is limited to 64 characters.

Delete Results

Select this button to clear out the Compare Results window.

Compare Results Summary

Identify the number of mismatches (up to 300) found during the comparison between the attached schedule and PTE table.

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Update Selected Select this button to update the system tables for selected mismatched rows.

Update All Select this button to update the system tables for all of the identified mismatched rows.

If there are more than 300 mismatches, you are prompted to reload the corresponding Pell Schedule using the Pell Table Enablement Load Run Control.

Preparing for Early Financial Aid Offers

To set up early financial aid categories, use the Early Financial Aid Categories component (ERLY_FA_CTG_TBL).

This section provides an overview of early financial aid offers and discusses how to set up early financial aid offer categories.

Understanding Early Financial Aid Offers

Early financial aid offers are a recruiting tool used by admissions and financial aid departments to provide preliminary financial aid offers to prospective students. The early financial aid offer is constructed independently of financial aid rules and procedures.

You can associate an early financial aid offer with each admission application a prospective student submits. This feature is especially useful for graduate and professional schools that make financial aid offers to hot prospects and is used by financial aid and undergraduate admission offices to provide a competitive advantage in their freshman recruitment process.

Early financial aid offers are made using general financial aid categories that you define on the Early Aid Categories page. Create early financial aid offer categories for all the types of financial aid that you are using for early awarding. For example, you may want to create separate early financial aid offer categories for grants, scholarships, work-study, and loans. When creating the early financial aid offer you could specify the estimated amount to be awarded in each category. If you want to display only an estimated total award amount you can define a general category, such as Estimated Financial Aid, and use only this category in the early financial aid offer.

Page Used to Prepare for Early Financial Aid Offers

Page Name	*Definition Name*	*Navigation*	*Usage*
Early Aid Categories	ERLY_FA_CTG_TABLE	Set Up SACR, Product Related, Financial Aid, Awards, Early Financial Aid Categories, Early Aid Categories	Set up early financial aid offer categories. Specify the types of aid your institution considers for an early financial aid offer.

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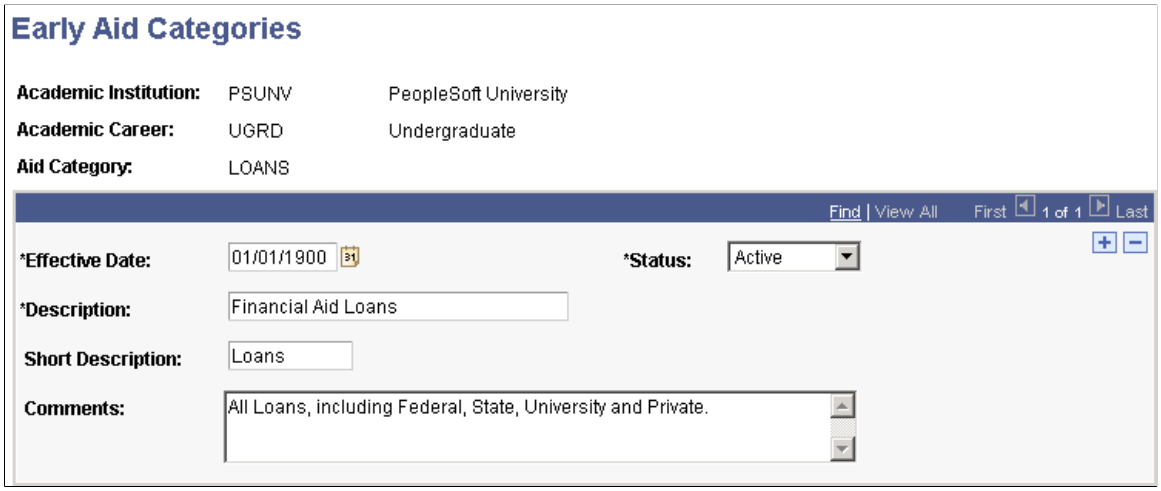
Setting Up Early Financial Aid Offer Categories

Access the Early Aid Categories page (Set Up SACR, Product Related, Financial Aid, Awards, Early Financial Aid Categories, Early Aid Categories).

Image: Early Aid Categories page

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



Comments Enter a more detailed description of the early financial aid offer category in this field. You can set up this description to print on your early financial aid offer letter.

Setting Up Restricted Aid

To set up restricted aid, use the Restricted Aid Table component (RESTRCTD_AID_SETUP).

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

- Define restricted aid basic information.
- Define award limits and requirements.
- Attach an external organization.
- Assign a committee.

Related Links

"Setting up Applicant Evaluation" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)
"Setting Up Student Response" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

Understanding Restricted Aid

Restricted aid includes awards such as scholarships, fellowships, and institutional or private funds with more subjective eligibility requirements. Restricted aid does not refer to federal monies. Awarding

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restricted aid makes use of the rating scheme and committee features of PeopleSoft Campus Community. Use the Restricted Aid Table component to set up all of the parameters and conditions for awarding your institution's restricted funds.

Note: If you are using a review process for evaluating candidates for restricted aid, you must define a rating scheme. You must also complete the pages in the Managing Organization Data and Managing Committee Data sections of the *PeopleSoft Campus Community Fundamentals* documentation.

See "Understanding Organization Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

See "Creating Committees" (PeopleSoft Campus Solutions 9.2: Campus Community) and "Assigning Committee Members" (PeopleSoft Campus Solutions 9.2: Campus Community).

Pages Used to Set Up Restricted Aid

Page Name	*Definition Name*	*Navigation*	*Usage*
Restricted Aid Detail 1	RSTRC_AID1	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 1	Define basic information about the restricted aid award, including whether an application is required and whether the award is renewable.
Restricted Aid Detail 2	RSTRC_AID2	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 2	Define award limits and requirements. Enter the number of awards, maximum and minimum award amounts, and application requirements.
Restricted Aid Org/Contact (restricted aid organization/ contact)	RSTRC_AID3	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Org/Contact	Attach an external organization to the restricted aid type and view the contact information for that organization.
Restricted Aid Committees	RSTRC_AID5	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Committees	Assign a committee to evaluate candidates. Review a list of individual committee members and their roles within the committee.

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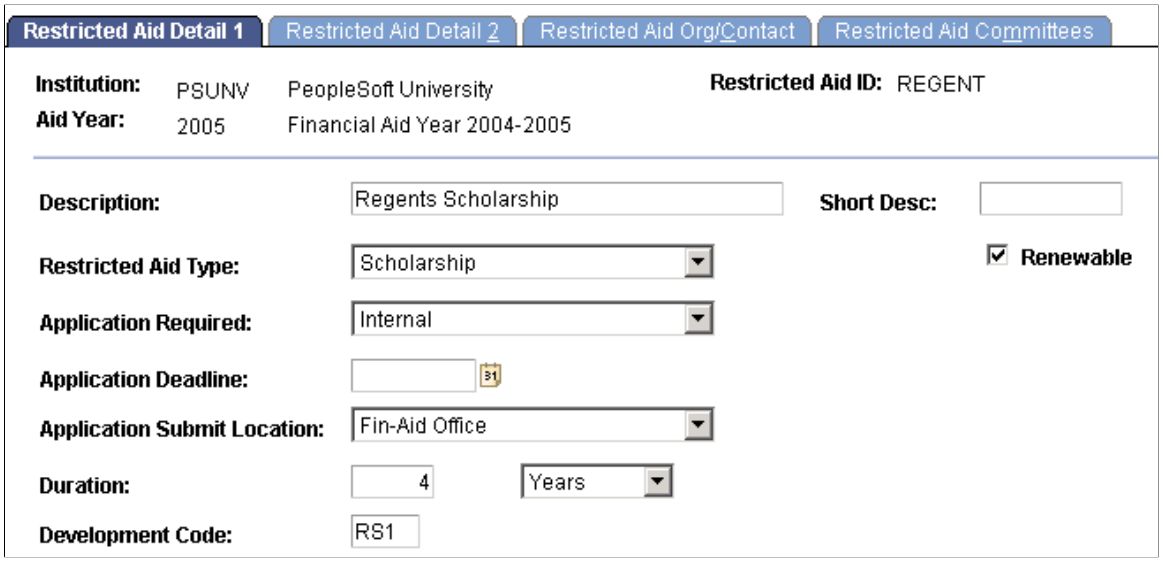
Defining Restricted Aid Basic Information

Access the Restricted Aid Detail 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 1).

Image: Restricted Aid Detail 1 page

This example illustrates the fields and controls on the Restricted Aid Detail 1 page. You can find definitions for the fields and controls later on this page.



Restricted Aid Type Identify the restricted aid as a fellowship or scholarship.

Renewable Select if the restricted aid is a renewable aid source.

Application Required Select whether an application is required, and if so, what kind of application. You can select *External, Internal,* or *No App* (no application).

Application Deadline and **Application Submit Location** If an application is required, enter the date it must be turned in and where to submit it.

Duration Enter a numeric value for the duration of the restricted aid type and then indicate in the adjacent field whether this is *Days, Months, Terms,* or *Years.*

Development Code Enter a code of up to four alphanumeric characters. The development code is institution-specific and assists with institutional reporting needs.

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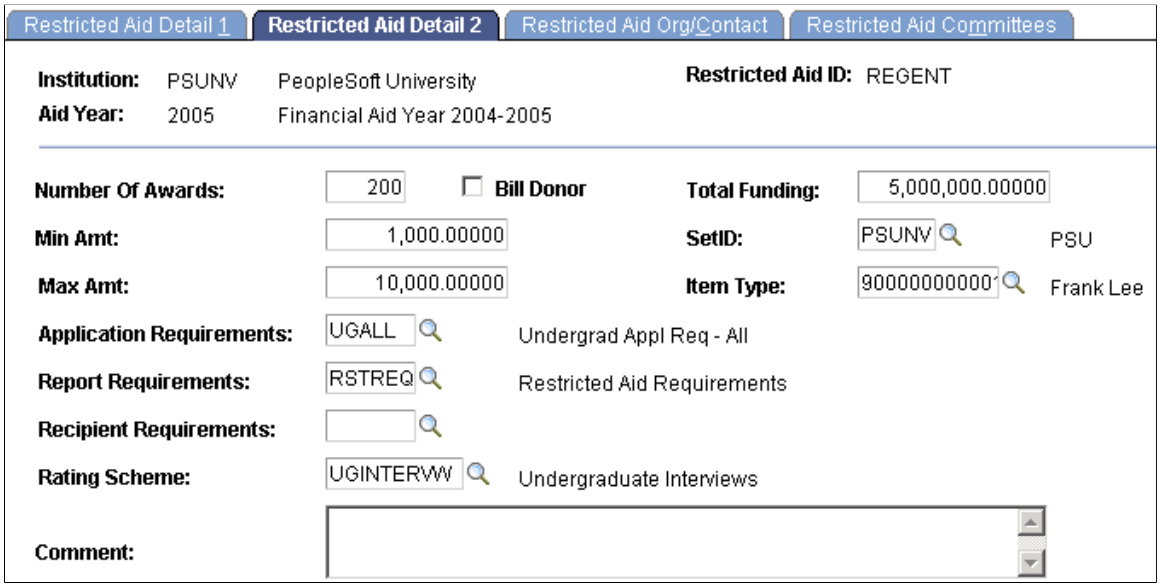
Defining Award Limits and Requirements

Access the Restricted Aid Detail 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 2).

Image: Restricted Aid Detail 2 page

This example illustrates the fields and controls on the Restricted Aid Detail 2 page. You can find definitions for the fields and controls later on this page.



Number of Awards	Enter the number of awards that you can make from this restricted aid type.
Bill Donor	Select if you bill the donor when the aid is awarded.
Total Funding	Enter the total funding amount for this restricted aid type.
Min Amt (minimum amount) and **Max Amt** (maximum amount)	Enter the minimum and maximum amounts that you can award for this restricted aid type.
Item Type	Enter the financial aid item type associated with this restricted aid type.
Application Requirements	Select the checklist that applicants must finish to apply for this restricted aid type.
Report Requirements	Select the checklist that contains the reporting requirements a staff member fulfills for this restricted aid type.
Recipient Requirements	Select the checklist that contains the tasks award recipients must fulfill.
Rating Scheme	Select the rating scheme that outlines the selection process. Rating schemes are set up in Recruiting and Admissions.

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Related Links

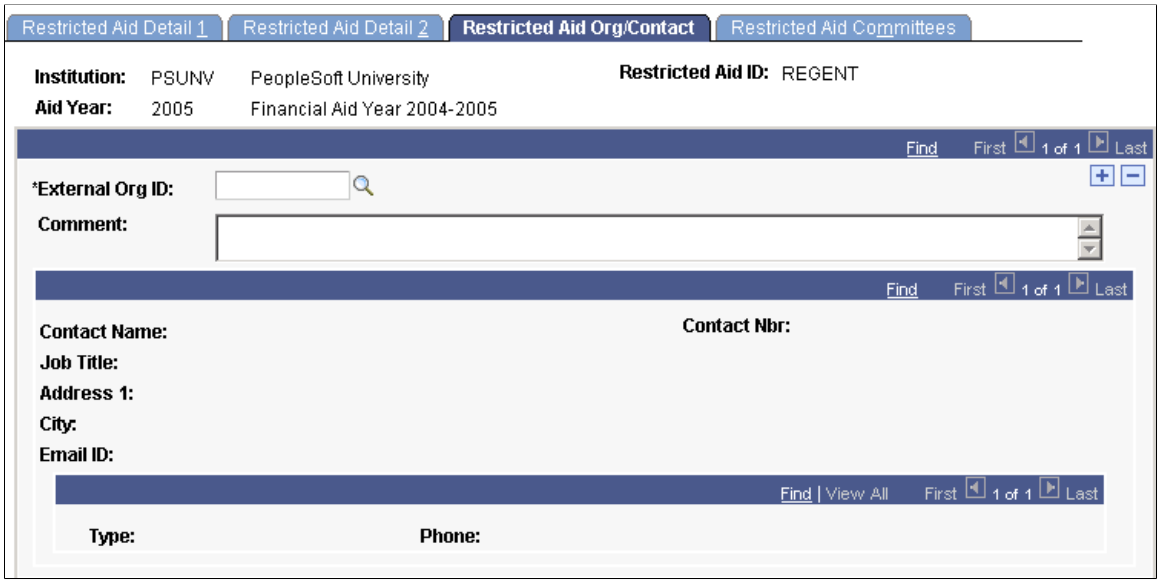
"Understanding Checklists" (PeopleSoft Campus Solutions 9.2: Campus Community)

Attaching an External Organization

Access the Restricted Aid Org/Contact page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Org/Contact).

Image: Restricted Aid Org/Contact page

This example illustrates the fields and controls on the Restricted Aid Org/Contact page. You can find definitions for the fields and controls later on this page.



External Org ID (external organization ID)	Select the organization ID that represents the organization associated with this restricted aid type. To view any additional organizations associated with this restricted aid type, use the scroll arrows.
Comment	Displays an explanation of the selected organization. Enter any additional information about the organization into this field.
Contact Name	Displays a contact person at the organization. To view additional contacts, use the scroll arrows.
Contact Nbr (contact number)	Indicates that more than one contact person exists, or differentiates between different contact information for the same contact person.
Phone	Displays the contact person's phone number.

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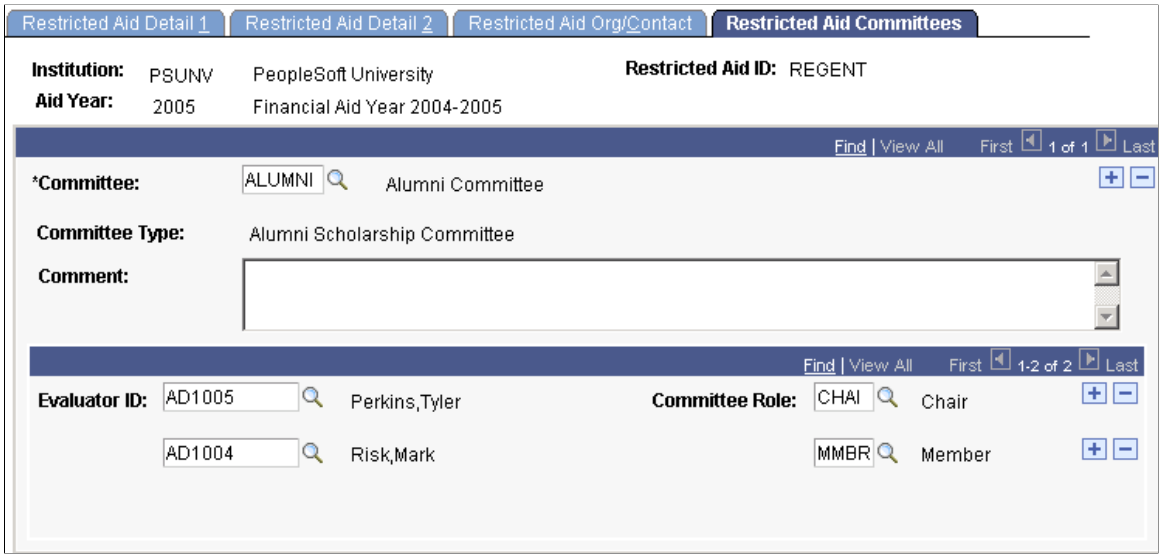
Assigning a Committee

Access the Restricted Aid Committees page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Committees).

Image: Restricted Aid Committees page

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



Committee	Enter the committee that evaluates the candidates.
Committee Type	Indicates the type of committee.
Comment	Enter additional information about the committee in this field.
Evaluator ID	Enter the ID of a committee member.
Committee Role	Enter the individual's role within the committee.

Related Links

"Understanding Committee Templates" (PeopleSoft Campus Solutions 9.2: Campus Community)
"Creating Committees" (PeopleSoft Campus Solutions 9.2: Campus Community)
"Assigning Committee Members" (PeopleSoft Campus Solutions 9.2: Campus Community)

Setting Up Award Adjustment Reasons

To set up award adjustment reasons, use the Award Adjustment Reasons component (AWRD_ADJ_RSN_TBL).

Award adjustment reasons are institutionally defined reasons indicating why an award may be adjusted. Award adjustment reasons can be used for clarification when modifying an award and also for statistical tracking purposes. You can enter an award adjustment reason any time that you change an award on the award entry pages, but award adjustment reasons are required on the Professional Judgement page. Some

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sample award adjustment reasons come pre-delivered with Financial Aid, but you can modify, add, and delete these.

This section discusses how to create award adjustment reasons.

Pages Used to Set Up Award Adjustment Reasons

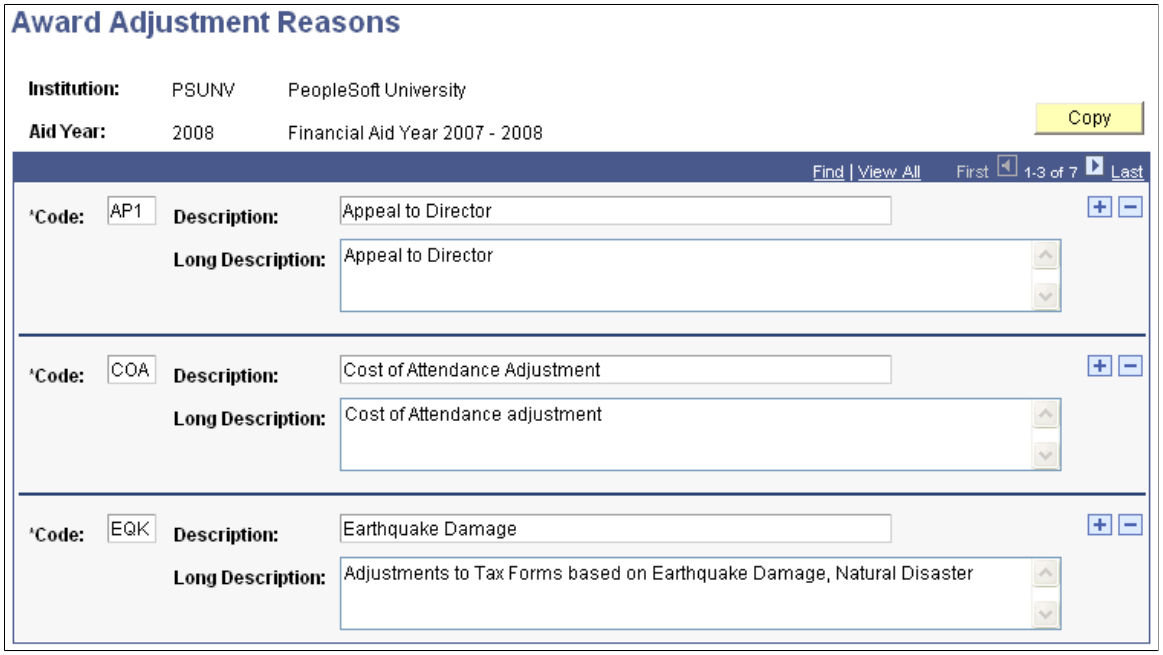
Page Name	*Definition Name*	*Navigation*	*Usage*
Award Adjustment Reasons	AWRD_ADJ_RSN_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Award Adjustment Reasons, Award Adjustment Reasons	Create or modify award adjustment reasons.
Copy Adjustment Reasons	AWD_ADJ_RSN_COPY	Click the Copy button on the Award Adjustment Reasons page.	Copy award adjustment reasons from one aid year and institution combination to another.

Creating Award Adjustment Reasons

Access the Award Adjustment Reasons page (Set Up SACR, Product Related, Financial Aid, Awards, Award Adjustment Reasons, Award Adjustment Reasons).

Image: Award Adjustment Reasons page

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



Code Enter a three-character code that represents the award adjustment reason.

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