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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8.9 MP1
Financial Aid
Changes and Updates for CS
Bundle #14
Regulatory Release 3 2008-2009

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Changes and Updates for CS Bundle # 14, Regulatory Release 3 2008-2009

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PeopleSoft Financial Aid Documentation Changes and Updates for CS Bundle # 14

Note. This document is an update to the *PeopleSoft Enterprise Financial Aid 8.9 MP1 PeopleBook*. It describes the Product Update ID # 701891 that was posted to Customer Connection in April 2008. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with CS Bundle # 14. Specifically, it discusses:

- Updates to ISIR comment codes for aid year 2008-2009.
- Updates to PLUS promissory notes data.
- Updates to treatment of TEACH grants.
- Notes on Mass Packaging Assign process and FED_EFC Sort field.
- Updates to Federal Pell Grant Payment and Disbursement Schedules – 2008-2009.
- Updates to FM and INAS interfaces.
- Updates to the CommonLine Hold and Release process.
- Updates to COD Year To Date financial aid reports.
- Updates to transfer credit information for ACG and SMART grant candidates.

Updates to ISIR Comment Codes for Aid Year 2008-2009

This section discusses changes to the ISIR Message Table for Aid Year 2008-2009.

Two new ISIR comment codes have been created to support the Teacher Education Assistance for College and Higher Education (TEACH) grant program. The new comment codes include:

- Comment Code **#281**
- Comment Code **#282**

A script is being delivered with this release to update the ISIR Message Tables with the two new comment codes.

Page Used to Maintain ISIR Comment Codes

Page Name	Object Name	Navigation	Usage
ISIR Comments	ISIR_COMMT_TBL	Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Comments	Review delivered ISIR comment codes and set severity levels. DB Match Use setting can be adjusted to control treatment by the packaging process. This page links the comment codes with the long description or text defined by the Department of Education.

Maintaining ISIR Comment Codes

Access the ISIR Comments page.

*Code	Description	Severity Level	DB Match Use
278	Your father was issued a Federal Student Aid PIN to sign your 2008-2009 FAFSA. We were unable to verify his name, date of birth, and Social Security Number (SSN) with the Social Security Administration.	0 Ignore	<input type="checkbox"/>
279	Your mother was issued a Federal Student Aid PIN to sign your 2008-2009 FAFSA. Her information has been verified and her PIN is correct.	0 Ignore	<input type="checkbox"/>
280	Your mother was issued a Federal Student Aid PIN to sign your 2008-2009 FAFSA. We were unable to verify her name, date of birth, and Social Security Number (SSN) with the Social Security Administration.	0 Ignore	<input type="checkbox"/>
281	When you completed your FAFSA, you responded 'YES' to the question about your plans to take coursework that will enable you to become a teacher. We asked this question because there is a new federal student aid program for students who plan on becoming teachers. You should go to www.teachgrant.ed.gov to learn more and find out what steps you must take to be considered for the program. If you cannot access the website, you should call 1-800-4-FED-AID (1-800-433-3243).	0 Ignore	<input type="checkbox"/>
282	There is a new federal student aid program for students who plan on becoming teachers. If you are interested, you should go to www.teachgrant.ed.gov to learn more and find out what steps you must take to be considered for the program. If you cannot access the website, you should call 1-800-4FEDAID (1-800-433-3243).	0 Ignore	<input type="checkbox"/>

ISIR Comments page

For Aid Year 2008-2009, the texts for the new comment codes include:

- 281** When you completed your FAFSA, you responded 'YES' to the question about your plans to take coursework that will enable you to become a teacher. We asked this question because there is a new federal student aid program for students who plan on becoming teachers. You should go to www.teachgrant.ed.gov to learn more and find out what steps you must take to be considered for the program. If you cannot access the website, you should call 1-800-4-FED-AID (1-800-433-3243).
- 282** There is a new federal student aid program for students who plan on becoming teachers. If you are interested, you should go to www.teachgrant.ed.gov to learn more and find out what steps you must take to be considered for the program. If you cannot access the website, you should call 1-800-4FEDAID (1-800-433-3243).

Updates to PLUS Promissory Notes Data

This section discusses changes to the PLUS Promissory Notes Data.

Page Used to Enter Plus Promissory Notes Data

Page Name	Object Name	Navigation	Usage
Promissory Note Plus	SFA_CRC_PNOTE_PLUS	Financial Aid, Loans, CommonLine Management, Enter PLUS Prom Notes	Enter promissory note data for PLUS loans. The system uses this data for origination.

Entering PLUS Promissory Notes Data

Access the Promissory Note Plus page.

The screenshot shows the 'Promissory Note Plus' page with the following details:

- Page Name:** Promissory Note Plus
- Object Name:** Loan Relation (Ref/Cosign)
- Organization:** Christina Health
- ID:** FA0712
- Aid Year:** 2005
- Financial Aid Year:** 2004-2005
- Institution:** PSUNV
- *Loan Type Code:** PL (FFEL Parent Loan - Sems)
- Application Number:** 1
- Borrower ID:** FA0800 (Julia Wrench)
- Lender OPEID:** 889002 (PeopleSoft CU - Encino)
- Lender Branch ID:** 0001
- Guarantor OPEID:** 706 (California Student Aid Commiss)
- References Complete:** Yes
- Borrower Signature:**
- Signature Date:** 10/27/2004

Promissory Note Plus page

The Borrower ID field has been modified.

Borrower ID

The information in the Borrower ID field can be changed until the Loan Origination process uses the promissory note data. The Borrower ID field becomes unavailable once the Loan Origination process uses the promissory note data.

To verify if the Loan Origination process has used the Pnote data, navigate to the **Loan Pnote Action Status** page by clicking the **Pnote Status** link.

Updates to Treatment of TEACH Grants

A new federal program, **TEACH**, has been added to the **Federal ID** field.

The packaging routine applies only the basic federal eligibility edits to item types associated with this Federal ID. There are no additional packaging edits or processing logic applied to TEACH item. You are solely responsible for determining which students are eligible to receive TEACH grants and the maximum amount to be awarded under this grant. We recommend that you control the awarding of the TEACH grant by establishing a TEACH aggregate, TEACH equations, and defining the Meet Need/Cost attribute of the TEACH item type as a Special Need/Cost.

Notes on Mass Packaging Assign Process and FED_EFC Sort Field

For the Mass Packaging Assign process, you should not use the Sort Field **FED_EFC** with packaging plans designated with the Non-Standard award period.

This is because FED_EFC represents the PRIMARY_EFC, which is the 9-month EFC. This is synonymous with the Academic award period. Therefore, all Non-Standard Award Period FED_EFC values will be 0.00.

If you sort by FED_EFC for any Non-Standard plan, because all of your students will have a Non-Standard FED_EFC value of 0.00, the system will default the Sort Order to EMPLID.

Updates to Federal Pell Grant Payment and Disbursement Schedules – 2008-2009

On January 10, 2008, the Department of Education released the official 2008-2009 Federal Pell Grant Program Payment and Disbursement Schedules. This document contains information to support the Pell related changes.

To package a Federal Pell Grant for students in 2009, verify that the following areas of the 2009 setup support the 2008-2009 amount of 4,731.00 USD:

1. Aggregate aid limit table (aggregate limit).
2. Item type table (maximum transaction amount).
3. Financial aid item type table (term category maximum).
4. Packaging plans that include the Pell item type (item type rule maximum).

Note. Because many Pell awards result in odd dollar amounts for the 2008-2009 Aid Year, Oracle strongly recommends that you double-check the rounding rules associated with your Pell Grant item types on FA Item Type setup page.

This section discusses how to define Financial Aid type rounding rules.

Page Used to Define Financial Aid Item Type Rounding Rules

Page Name	Object Name	Navigation	Usage
FA Item Type 2	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2	Define rounding rules. Enter rounding and remainder rules for the financial aid item type.

Defining Financial Aid Item Type Rounding Rules

Access the FA Item Type 2 page.

The screenshot displays the configuration page for 'FA Item Type 2'. At the top, there are tabs for 'FA Item Type 1' through 'FA Item Type 6', with 'FA Item Type 2' selected. Below the tabs, the following information is shown:

- SetID:** PSUNV
- Item Type:** 900000000370 [Federal Pell Grant - Quarter](#)
- Aid Year:** 2009 Federal Aid Year 2008 - 2009

The main section is titled 'Awarding Rules' and includes a search bar and navigation controls (Find, View All, First, 1 of 1, Last). The configuration options are as follows:

- Effective Date:** 01/28/2005 **Status:** Active
- Fed/Inst Affected:** Both Fed and Inst
- Meet Need/Cost:** Straight Need/Cost
- Packaging Methodology:** Federal Methodology
- Selection Criteria:** [Search box]
- Need Based** **Lock Award**
- Self Help Award** **Auto Package**
- Equity Award** **Package Only Once** **Disbursement Protection**

The **Rounding Rules** section, highlighted with a red box, contains:

- Rounding Option:** Dollar
- Round Direction:** Nearest
- Award Remainder Rule:** 1st-Dllrs
- Fee Remainder Rule:** [Dropdown menu]
- Truncate Fees**

FA Item Type 2 page

After you complete the appropriate setup specified, the system will use the 2008-2009 Federal Pell Grant Program Payment and Disbursement Schedules to award students up to a maximum of 4,731.00 USD based on eligibility.

Updates to FM and INAS Interfaces

The interface changes for FM include:

- Updates to the INAS interface to calculate FM (Federal Methodology) in addition to IM (Institutional Methodology) INAS to support 2008-2009 computation tables.
- Updates to INAS Simulation fields for students.
- Updates to INAS Simulation field for parents.
- Updates to INAS Local Policy Option calculation choices.

This fix documentation discusses how to:

- Work with INAS simulation for student income assets.
- Work with INAS simulation for student information.
- Work with INAS simulation for parent income/assets.
- Define INAS calculation options.

Pages with FM INAS Critical Changes

Page Name	Object Name	Navigation	Usage
Student Income/Assets	INAS_SIM_STU1_06	Financial Aid, Federal Application Data, Simulate 2008-2009 FM INAS, Student Income/Assets	View and update fields from ISIR Corrections.
Student Information	INAS_SIM_STU2_08	Financial Aid, Federal Application Data, Simulate 2008-2009 FM INAS, Student Information	View and update fields from ISIR Corrections.
Parent Income/Assets	INAS_SIM_PAR1_06	Financial Aid, Federal Application Data, Simulate 2008-2009 FM INAS, Parent Income/Assets	View and update fields from ISIR Corrections.
Global and Federal Options	INAS_LCL_PLCY1_05	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 2008-2009 Global Options, Global and Federal Options	Invoke INAS changes by invoking calculation options.

Working with INAS Simulation for Student Income Assets

Access the Student Income/Assets page.

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides	
Joon Song		ID: FA0601			
Aid Year: 2009 Financial Aid Year 2008 - 2009		Institution: PSUNV			
<input type="button" value="Get Federal Data"/>		Federal Extension		Formula Type: 2 Full w/out	
<input type="button" value="INAS"/>		Need Summary		Primary EFC: 3,871	
<input type="button" value="Use Simulated Data"/>		Monthly EFC		Prorated EFC: 3,871	
Married:	<input type="text" value="No"/>	AGI:	<input type="text" value="19,500"/>	Cash:	<input type="text" value="1,200"/>
Marital Status:	<input type="text" value="Sng/DivWd"/>	U. S. Tax Paid:	<input type="text" value="3,655"/>	Inv Net Worth:	<input type="text" value="4,000"/>
Marital Status Date:	<input type="text"/>	Student's Earnings:	<input type="text" value="18,000"/>	Bus Net Worth:	<input type="text" value="0"/>
Legal Res State:	<input type="text" value="SC"/>	Spouse's Earnings:	<input type="text" value="0"/>	Worksheet A:	<input type="text" value="100"/>
Legal Res Date:	<input type="text"/>	Res Prior 2003:	<input type="text" value="Yes"/>	Worksheet B:	<input type="text" value="0"/>
In Family:	<input type="text" value="01"/>	File Return?:	<input type="text" value="Not Filed"/>	Worksheet C:	<input type="text" value="20"/>
In College:	<input type="text" value="1"/>	Tax Form:	<input type="text" value="1040"/>		
Exemptions:	<input type="text" value="01"/>	Elig 1040A/EZ?:	<input type="text" value="No"/>		
		Male or Female:	<input type="text" value="Male"/>		

Student Income/Assets page

Changed fields and new fields are described here.

Res Prior 2002 This field has been updated to **Res Prior 2003** field.

Are You Male? This field has been updated to **Male or Female** field.

Working with INAS Simulation for Student Information

Access the Student Information page.

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides
Joon Song		ID: FA0601		
Aid Year: 2009	Financial Aid Year 2008 - 2009	Institution: PSUNV		
Get Federal Data	Federal Extension	Formula Type: 2 Full w/out		
INAS	Need Summary	Primary EFC: 3,900		
Use Simulated Data	Monthly EFC	Prorated EFC: 3,900		
Dependency Status: Independent w/Primary EFC				
VA Ben Nbr of Months: <input type="text" value="00"/>	Born Prior 1985: <input type="text" value="1"/>	Yes	Food Stamps: <input type="checkbox"/>	
VA Ben Monthly Amt: <input type="text" value="0"/>	Veteran: <input type="text" value="2"/>	No	School Lunch: <input type="checkbox"/>	
Grade Level: <input type="text" value="Grad/Prof+"/>	On Active Duty: <input type="text" value="2"/>	No	SSI: <input type="checkbox"/>	
Dependents: <input type="text" value="2"/> No	Graduate Student: <input type="text" value="1"/>	Yes	TANF: <input type="checkbox"/>	
Orphan: <input type="text" value="2"/> No	Selective Service?: <input type="checkbox"/>		WIC: <input type="checkbox"/>	
Children: <input type="text" value="2"/> No	1st Degree: <input type="text" value="1"/>	Yes	Work or Loan: <input type="text" value="2"/>	Student Ln
	Enroll Status: <input type="text" value="1"/>	Full Time		

Student Information page

The **Born Prior 1984** field has been changed to **Born Prior 1985**.

Working with INAS Simulation for Parent Income/Assets

Access the Parent Income/Assets page.

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides	
Joon Song		ID:	FA0601		
Aid Year:	2009	Financial Aid Year 2008 - 2009	Institution:	PSUNV	
Get Federal Data	Federal Extension	Formula Type:	2 Full w/out		
INAS	Need Summary	Primary EFC:	3,900		
Use Simulated Data	Monthly EFC	Prorated EFC:	3,900		
Marital Status:	Mar/ReMar	AGI:	31,500	Cash:	1,600
Marital Status Date:		U. S. Tax Paid:	2,500	Inv Net Worth:	3,000
Legal Res State:	SC	Father's Earnings:	11,000	Bus Net Worth:	0
Legal Res Date:		Mother's Earnings:	17,000	Worksheet A:	0
In Family:	03	Res Prior 2003:	Yes	Worksheet B:	0
In College:	1	Tax Form:		Worksheet C:	0
Exemptions:	03	Tax Return Filed?:		Father Birth Date:	01/01/1958
		Elig 1040A/EZ?:		Mother Birth Date:	01/01/1960
Save Return to Search Notify Previous tab Next tab					

Parent Income/Assets page

The **Res Prior 2002** field has been changed to the **Res Prior 2003** field.

Defining INAS Calculation Options

Access the Global and Federal Options page.

Global and Federal Options	IM Tax/Assess & Parms	EFM Yes/No Options	IM Value Parms 1	IM Value Parms 2
Aid Year:	2009	Financial Aid Year 2008 - 2009	Institution:	PSUNV
Find View All First 1 of 2 Last				
*INAS Rule Set:	CSS Rules/Values			
Global				
INAS Data Source:	Both F/I	INAS Calc Type:	FM & IM	
Federal				
Calc Fed Tax - Student	<input type="checkbox"/>	FM Budget Durations		
Calc Fed Tax - Parent	<input type="checkbox"/>	EFC Proration Options		
Calc PC For Independent	<input type="checkbox"/>			
Institutional				
Use Which EFC:	Greatest	IM Budget Durations		
Application Source:	Profile			
State:				

Global and Federal Options page

Use this page to calculate INAS for ISIR records or Profile records.

Global

INAS Data Source

Select:

- *Both F/I* to calculate INAS for either Profile or ISIR records.
- *Federal* to calculate INAS for ISIR records only.
- *Institutnl* to calculate INAS for Profile records only.

INAS Calc Type

Select:

- *FM* to calculate INAS for ISIR records only.
- *FM & IM* to calculate INAS for either Profile or ISIR records.
- *IM* to calculate INAS for Profile records only.

Updates to the CommonLine Hold and Release Process

This section discusses changes to the CommonLine Hold and Release process. The system now supports Hold and Release processing for CL4 & CRC loans.

Updates to COD Year To Date Financial Aid Reports

This section discusses changes to COD Year To Date financial aid reports for Pell and ACG/SMART grants.

COD does not support Financial Aid reports that query for an action code of E (Error). Valid COD action codes are:

- A - Accepted
- C - Corrected
- D - Duplicate
- R - Rejected

Consequently, the following reports have been removed from navigation and are no longer supported:

- Pell Year to Date Originations Errors
- Pell Year To Date Disbursement Errors
- ACG/SMART Year to Date Origination Errors
- ACG/SMART Year To Date Disbursement Errors

Pages Used to Produce Pell and ACG/SMART COD Reports

Page Name	Object Name	Navigation	Usage
YTD Originations Errors	RUN_CNTL_PGOYTD_ER	Financial Aid, Pell Payment, Year To Date Reports, YTD Originations Errors	Review information from COD and your application tables.
YTD Disbursement Errors	RUN_CNTL_PGDYTD_ER	Financial Aid, Pell Payment, Year To Date Reports, YTD Disbursement Errors	Review information from COD and your application tables.
YTD Origination Errors	SFA_ASG_872_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Origination Errors	Review information from COD and your application tables.
YTD Disbursement Errors	SFA_ASG_874_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Disbursement Errors	Review information from COD and your application tables.

Updates to Transfer Credit Information for ACG and SMART Grant Candidates

This section discusses how to:

- Review articulated transfer coursework.
- Review articulated transfer test credits.

The final regulations for the ACG and SMART grant programs require schools to determine HERA academic level progression using the exact accounting method or one of the acceptable alternative methods, beginning Aid Year 2009.

Modifications to the FA Term process to perform this calculation are currently under development and will be delivered in a future bundle.

In the current bundle, changes have been made to the Transfer Credit Evaluation module to support the new HERA academic level calculations. The final regulations for ACG and SMART require that a *Weeks of Instruction* value be calculated from a student’s acceptable transfer work.

The updated transfer credit process allows you to:

- Identify and select the articulated transfer courses, test credits, or other credits to be used in the *Weeks of Instruction* calculation.
- Summarize and store the selected transfer work information into new fields, which the FA Term process will use to determine the student’s HERA level.

After the transfer credit changes delivered in the bundle have been installed, you must review and update the existing articulated transfer work to ensure that the Financial Aid Office can calculate an accurate HERA academic level. The following tasks must be performed prior to the delivery of the new HERA level calculation changes.

Note. Since these tasks require the use of the transfer credit evaluation module, collaboration with the Student Records staff is required.

First, review the results of the changes to the completed transfer credit evaluations. Verify that the articulated transfer courses, test credits, and other credits have been properly updated to indicate whether the transfer work will be used to calculate a *Transfer Weeks Of Instruction* value.

When performing the first task, consider the following points:

- By default, all transfer coursework will be set with the **Include in FA WI Stats** checkbox selected.
- By default, no transfer test credit test scores will have the **Include in FA WI Stats** checkbox selected. This is because test credits are not usually included in the *Transfer Weeks Of Instruction* calculation.
- By default, no transfer other credit sources will have the **Include in FA WI Stats** checkbox selected. Other credits refer to work and life experience credits. Currently, these credits cannot be included in the *Transfer Weeks Of Instruction* calculation.
- You may wish to restrict your review to the transfer work of your known and potential ACG and SMART recipients. You do not need to perform this review for your graduate students.

Second, run the transfer credit calculation process to populate the new **Include in Financial Aid Weeks of Instruction Stats** fields. The FA Term process will use the data in these fields to calculate the *Transfer Weeks Of Instruction* value.

Third, if necessary, repeat the same steps for the two other transfer credit sources: test credits (component Test Credits – Manual) or other credits (component Other Credits – Manual). It is unlikely that you will need to update any transfer work captured in these areas that are not expected to be included in the *Transfer Weeks Of Instruction* calculation.

Finally, create procedures with the student records staff for performing new transfer credit evaluations.

It is important to note that if these steps are not performed, the system will consider the *Transfer Weeks Of Instruction* value as 0. This may cause a lower HERA level to be calculated. Also, schools who may choose to use a HERA level calculation method that does not require a *Weeks of Instruction* calculation (i.e. grade level method) will still need to review and update their transfer work using the above steps.

Reviewing Previously Articulated Transfer Coursework

This section discusses how to review previously articulated transfer coursework.

Pages Used to Review Previously Articulated Transfer Coursework

Page Name	Object Name	Navigation	Usage
Transfer Course Entry	TRNS_CRSE_ENTRY	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Transfer Course Entry	Set up course transfer credit models and articulate transfer credit manually as you set up models rather than by using predefined equivalency rules. This page is essentially the same as the Transfer Course Details page of the Course Credits component with the few exceptions that are described in this section.
Equivalent Course Information	TRNS_CRSE_INT_SEC	Click the Details link on the Transfer Course Details page to view equivalent course information.	View incoming course credit information for a specific row of a course transfer credit model, and view and edit equivalent course information.
Course Credits By Term	TRNS_CRSE_TERM	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Course Credits by Term	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of the model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit. This is the same page as the Transfer Summary page of the course credits component.

Reviewing Completed Transfer Course Credit Evaluation

Access the Transfer Course Entry page.

Transfer Course Entry		Course Credits by Term	
Student Test1		FAASG001	
Transfer Credit Model Find View All First 1 of 1 Last			
Academic Career:	UGRD	Undergraduate	<input type="button" value="+"/> <input type="button" value="-"/>
Academic Institution:	PSUNV	PeopleSoft University	
*Model Nbr:	<input type="text" value="1"/>		
*Transcript Level:	<input type="button" value="Unofficial"/> <input type="button" value="v"/>		
Target Information			
*Academic Program:	<input type="text" value="FAU"/>	Fine Arts Undergraduate	<input type="checkbox"/> Include in GPA
Academic Plan:	<input type="text" value="UNDECL-UG"/>	Undeclared Undergraduate	
Source Information			
*Credit Source Type:	<input type="button" value="Manual"/> <input type="button" value="v"/>		
Source Institution:	<input type="text" value="Pierce College"/>		
School Type:	<input type="button" value="NA"/> <input type="button" value="q"/>	Not Applicable	
Transfer Credit Term Find View All First 1 of 1 Last			
*Articulation Term:	<input type="text" value="0590"/> <input type="button" value="q"/>	2007 Fall	Posted <input type="button" value="+"/> <input type="button" value="-"/>
Incoming Course Find View All First 1 of 1 Last			
*Group	<input type="text" value="1"/>	*Seq#	<input type="text" value="1"/>
Year:	<input type="text" value="2007"/>	Ext Term:	<input type="text" value="FALL"/>
Status:	<input type="text" value="MATH"/>	Subject:	<input type="text" value="MATH"/>
Posted	<input type="text" value="1"/>	Course Nbr:	<input type="text" value="1"/>
Details	<input type="text" value="Math 1"/>	Description:	<input type="text" value="Math 1"/>
Comments	<input type="text" value="3.00"/>	Units Taken:	<input type="text" value="3.00"/>
	<input type="text" value="A"/>	Grade Input:	<input type="text" value="A"/>
Equivalent Course			
Course ID:	<input type="text" value="001005"/>	MATH	
Offer Nbr:	<input type="text" value="1"/>	111	
Units Transferred:	<input type="text" value="3.000"/>		
Grading Scheme	<input type="text" value="UGD"/>	Undergrad	
Grading Basis:	<input type="text" value="GRD"/>	Graded	
Official Grade:	<input type="text" value="T"/>	Transfer	

Example of a completed transfer course credit evaluation page

This page shows by term all coursework accepted by the school.

You must review each accepted course and verify the courses to be used in the *Transfer Weeks Of Instruction* calculation. Note that some of the fields on the page are grayed. This indicates that the transfer credit evaluation for these fields is complete.

Note that transfer coursework can be stored in more than one model and more than one term in the page. All courses must be reviewed.

Reviewing Equivalent Course Information

Access the Equivalent Course Information page.

Equivalent Course Information

Incoming Course				<input type="button" value="OK"/> <input type="button" value="Cancel"/>
Term Year:	2007	FALL		
Subject:	MATH	Course Nbr:	1	
Description:	Math 1			
Units Taken:	3.00	Grade Input:	A	Crse Level: ▼

Equivalent Course				
Course ID:	001005	Calculus I		
Offer Nbr:	1	MATH	111	
Units Transferred:	3.000			<input checked="" type="checkbox"/> Valid Attempt
Grading Scheme:	UGD	Undergraduate Grading Scheme	Grd Pt/Unt:	3.000
Grading Basis:	GRD	Graded	<input checked="" type="checkbox"/> Earn Credit	
Official Grade:	T	Transfer	<input type="checkbox"/> Include in GPA	
Repeat Code:		Units Att: Yes		
Designation:	<input type="text"/>			
<input checked="" type="checkbox"/> Include in FA WI Stats				

Equivalent Course Information page

Include in FA WI Stats check box

By default, the **Include in FA WI Stats** check box is selected for all courses within the **Equivalent Course** group box. Identify the courses that are not eligible and deselect the **Include in FA WI Stats** check box for such courses.

Reviewing Course Credit by Term

Access the Course Credits By Term page.

Transfer Course Entry		Course Credits by Term	
Student Test1		FAASG001	
Transfer Credit Model Find View All First 1 of 1 Last			
Academic Career:	UGRD	Undergraduate	
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	FAU	Fine Arts Undergraduate	
Admit Type/Term:			
Articulation Term: 2007 Fall Find View All First 1 of 1 Last			
Model Status: Posted		Posted Date: 03/27/2008	
		User ID: Grace Field	
<input type="button" value="Calculate"/> <input type="button" value="Post"/> <input type="button" value="Unpost"/>			
Units Taken:	3.00		
Units Transferred:	3.000		
Include in FA WI Stats			
Units Taken:	0.00		
Units Transferred:	0.000		
Course Credits Summary			
Units Taken:	3.00		
Units Transferred:	3.000		

Course Credits by Term page

Calculate Click to calculate the data within the **Include in FA WI Stats** region for each term.

Note. The FA Term process will use this information to calculate the HERA level.

Viewing the Course Credits Data After Calculation

Access the Course Credits By Term page.

Transfer Course Entry		Course Credits by Term	
Student Test1		FAASG001	
Transfer Credit Model Find View All First 1 of 1 Last			
Academic Career:	UGRD	Undergraduate	+ -
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	FAU	Fine Arts Undergraduate	
Admit Type/Term:			
Find View All First 1 of 1 Last			
Articulation Term:	2007 Fall	Posted Date:	03/27/2008 + -
Model Status:	Posted	User ID:	Grace Field
<input type="button" value="Calculate"/> <input type="button" value="Post"/> <input type="button" value="Unpost"/>			
Units Taken:	3.00		
Units Transferred:	3.000		
▼ Include in FA WI Stats			
Units Taken:	3.00		
Units Transferred:	3.000		
Course Credits Summary			
Units Taken:	3.00		
Units Transferred:	3.000		

Course Credits by Term page after calculation

This page shows that the **Include in FA WI Stats** data is now calculated.

Note. You must repeat the calculation process for all models and terms where transfer coursework exists.

Reviewing Articulated Transfer Test Credits

This section discusses how to review articulated transfer test credits.

Pages Used to Review Articulated Transfer Test Credits

Page Name	Object Name	Navigation	Usage
Test Credit Entry	TRNS_TEST_ENTRY	Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit Entry	Set up test transfer credit models and articulate transfer credit by creating test transfer models manually rather than by using predefined equivalency rules. This page is essentially the same as the Test Credit Details page of the Test Credits component, with a few exceptions that are described in this section.
Test Credit by Term	TRNS_TEST_TERM	<ul style="list-style-type: none"> Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit by Term Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit by Term 	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of a transfer credit model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit.
Equivalent Course Information	TRNS_TEST_EDIT_SEC	Click the Edit Equivalent Course button on the Test Credit Entry page.	Add incoming test credit information and internal equivalent course information for a specific row of a test transfer credit model for which you are manually defining equivalencies.

Reviewing Test Credit Entry Details

Access the Test Credit Entry page.

Test Credit Entry
Test Credit by Term

Julius Welch
FAASG022

Find | View All
First
1 of 1
Last

Academic Career: UGRD Undergraduate

Academic Institution: PSUNV PeopleSoft University

***Model Nbr:** 1

***Transcript Level:** Unofficial

Target Information

***Academic Program:** LAU Liberal Arts Undergraduate **Include in GPA**

Academic Plan: BIOLBS Biology (BS)

Find | View All
First
1 of 1
Last

***Articulation Term:** 0570 2006 Fall Posted

*Group	*Seq#	Status	Test ID	Test Component	Equivalent Subject / Catlg Nbr
1	1	Posted	AP	MAB	MATH 111

[Add/View Comments](#)

Test Credit Entry page

You can evaluate the transfer test credits on this page.

Note that transfer test credit can be stored in more than one model and more than one term in the page. All test credit must be reviewed.

Reviewing Equivalent Course Information

Access the Equivalent Course Information page.

Equivalent Course Information			
Test Credit Input			
Test ID:	AP	Adv Plcmnt	
Component:	MAB	Mathematics: Calculus AB	
Data Source:	ACT	Test Score:	4.00
Test Date:	10/08/2006	Percentile:	
Equivalent Course			
Course ID:	001005	Calculus I	
Offer Nbr:	1	MATH 111	
Units Transferred:	3.000		<input checked="" type="checkbox"/> Valid Attempt
Grading Scheme:	UGD	Undergraduate Grading Scheme	<input checked="" type="checkbox"/> Earn Credit
Grading Basis:	GRD	Graded	<input type="checkbox"/> Include in GPA
Official Grade:	T	Transfer	Grd Pt/Unt: 3.000
Repeat Code:			Units Att: Yes
Designation:			
	<input type="checkbox"/> Include in FA WI Stats		

Equivalent Course Information page

Include in FA WI Stats check box Select this check box if you want the system to use the test credits when calculating the *Transfer Weeks Of Instruction* value.

Reviewing Test Credit By Term

Access the Test Credit by Term page.

Test Credit Details		Test Credit by Term	
Julius Welch		FAASG022	
Find View All First 1 of 1 Last			
Academic Career:	UGRD	Undergraduate	
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	LAU	Liberal Arts Undergraduate	
Admit Term:			
Find View All First 1 of 1 Last			
Articulation Term:	2006 Fall	Posted Date:	05/08/2007
Model Status:	Posted	User:	Betty Locherty
		<input type="button" value="Calculate"/>	<input type="button" value="Post"/> <input type="button" value="Unpost"/>
Units Transferred:	3.000		
FA Weeks of Instruction Stats			
Units Transferred:	0.000		
Test Credits Summary			
Units Transferred:	3.000		

[Test Credit by Term page](#)

Calculate Click to populate the **FA Weeks of Instruction Stats** fields.

Repeat the calculation process for all models and terms where transfer test credits were updated.

Index of Cumulative Changes for 8.9 MP1

The index of cumulative changes includes features from these bundle documents. Access Customer Connection (Support, Documentation, Documentation Updates, Enterprise, Campus Solutions, Financial Aid) to view all bundle documents.

- CS Bundle #1, Summer Bundle, posted August 2005
- CS Bundle #2, Regulatory Release 1, 2006-2007, posted October 2005
- CS Bundle #3, Regulatory Release 2, 2006-2007, posted January 2006
- CS Bundle #4, Regulatory Release 3, 2006-2007, posted May 2006
- CS Bundle #5, Regulatory Release 4, 2006-2007, posted June 2006
- CS Bundle #6, Summer Bundle, posted August 2006
- CS Bundle #7, Regulatory Release 1, 2007-2008, posted November 2006

- CS Bundle #8, Regulatory Release 2, 2007-2008, posted January 2007
- CS Bundle #9, Regulatory Release 3, 2007-2008, posted April 2007
- CS Bundle #10, Regulatory Release 4, 2007-2008, posted June 2007
- CS Bundle #11, Summer Bundle, posted August 2007
- CS Bundle #12, Regulatory Release 1, 2008-2009, posted November 2007
- CS Bundle #13, Regulatory Release 2, 2008-2009, posted January 2008
- CS Bundle #14, Regulatory Release 3, 2008-2009, posted April 2008

ACG and SMART grants

- Bundle #8, COD reporting, eligibility, processing, setting up, special cases
- Bundle #9, COD reporting, data requests, Multiple Reporting Records
- Bundle #10, COD reporting, disbursement, eligibility, equations, Financial Aid terms, Multiple Reporting Records, NSLDS aggregates, Packaging, processing, setting up
- Bundle #11, aggregate level changes, Professional Judgement, re-evaluating
- Bundle #12, Packaging, part-time students, Self Service
- Bundle #13, Packaging updates
- Bundle #14, Transfer Credit Information updates

- CNAS (Canada Need Analysis System)
- Bundle #5, OSAP data load, Suspense

CommonLine loans (CRC and CL4)

- Bundle #4, disbursement tolerance check restored, lender information, version default
- Bundle #6, Graduate PLUS promissory note and loan origination
- Bundle #14, CommonLine Hold and Release process, PLUS promissory note updates

CommonLine 4 loans (CL4)

- Bundle #6, direct disbursement by lender (PSDL), inbound load program

Common Record CommonLine (CRC)

- Bundle #1, Certification requests, disbursement, loan changes, reports
- Bundle #9, 1.2.0 schema, disbursement outbound data, Graduate PLUS outbound data

Packaging

- Bundle #14, Notes on Mass Packaging Assign Process and FED_EFC Sort field

Direct Loans

- Bundle #1, COD address changes, loan transfer IDs for 2005-2006, Promissory notes, single term, updates to pages and paths for 2003-2004
- Bundle #4, loan transfer IDs for 2006-2007
- Bundle #6, Graduate PLUS loans
- Bundle #8, COD award data, setting up student eligibility
- Bundle #13, Direct Loan COD processing
- Bundle #14, COD Year to Date Financial Aid report updates

DLSAS (Direct Loan School Account Summary)

Bundle #1, cash transactions for 2005-2006, file processing, loan transfer IDs, message classes for 2005-2006

Bundle #4, cash transactions for 2006-2007, file processing, message classes for 2006- 2007

Bundle #8, message classes for 2007-2008

Disbursement

Bundle #1 resident state as a restriction

FE FAN

Bundle #1, other resources

Financial Aid Term

Bundle #1, academic plan, cumulative statistics, overrides

Bundle #4, census report documentation, documentation of the Driver Creation Option

Financial Aid Item Types

Bundle #5, new translate values

Bundle #14, Treatment of TEACH grant update

FISAP (Fiscal Operations Report and Application to Participate)

Bundle #1, functionality

Bundle #5, 2006-2007 reporting and 2007-2008 application, functionality, queries

Bundle #10, 2007-2008 reporting and 2008-2009 application, ACG/SMART in the FISAP report

Grad PLUS loans

Bundle #5, overview, setting up

Bundle #6, linked to NSLDS, loan type, promissory note

Bundle #9, outbound data in CRC

INAS (Institutional Need Analysis System)

Bundle #2, IM regulatory updates for 2006-2007

Bundle #4, FM regulatory updates for 2006-2007

Bundle #7, IM regulatory updates for 2007-2008

Bundle #9, FM regulatory updates for 2007-2008

Bundle #12, IM regulatory updates for 2008-2009

Bundle #14, FM regulatory updates for 2008-2009

ISIR (Institutional Student Information Records)

Bundle #2, regulatory updates for 2006-2007

Bundle #3, Correction and Signature files for 2006-2007, FA914 process removed

Bundle #7, regulatory updates for 2007-2008

Bundle #8, Correction and Signature files for 2007-2008

Bundle #12, regulatory updates for 2008-2009

Bundle #13, 2008-2009 ISIR Correction and Signature files, and file layout

Bundle #14, ISIR Comment Codes for Aid Year 2008-2009 updates

Need Access

See *PROFILE*.

NSLDS (National Student Loan Data System)

- Bundle #1, load file layout changes for 2005-2006
- Bundle #2, ISIR regulatory updates for 2006-2007
- Bundle #3, load file layout changes for 2006-2007
- Bundle #7, ISIR regulatory updates for 2007-2008
- Bundle #8, Alert File Report, load file layout changes for 2007-2008
- Bundle #12, ISIR regulatory updates for 2008-2009
- Bundle #13, INSLDS Transfer Monitoring and Financial Aid History files, and PX code

Pell Awards

- Bundle #3, schedule support for 2006-2007
- Bundle #4, schedule support for 2006-2007
- Bundle #8, schedule work-around for 2007-2008
- Bundle #9, schedule support for 2007-2008
- Bundle #13, elimination of tuition sensitivity provision, 2008-2009 schedules

Pell Payments

- Bundle #1, COD address changes
- Bundle #4, COD regulatory updates for 2006-2007
- Bundle #9, COD regulatory updates for 2007-2008
- Bundle #13, Pell COD processing for 2008-2009
- Bundle #14, Pell Grant Payment and Disbursement Schedules for 2008-2009

Perkins

- Bundle #1, authorization, disbursement, MPN functionality
- Bundle #6, MPN form for military deferment

PROFILE

- Bundle #2, page maps for student, parent, miscellaneous, and computation data, record layout, regulatory updates for 2006-2007, run control fields, Suspense management pages and data maps
- Bundle #7, record layout
- Bundle #7, regulatory updates for 2007-2008, run control fields
- Bundle #12, regulatory updates for 2008-2009

Resident state

- Bundle #1, restriction for disbursement of item type

RTIV (Return of Title IV)

- Bundle #7, HERA and regulatory updates for 2006-2007
- Bundle #12, Regulatory updates for 2007-2008

SAP (Satisfactory Academic Progress)

- Bundle #5, processing and maintaining, setting up
- Bundle #10, documentation corrections, processing and maintaining, setting up

Self Service

- Bundle #3, accepting SUB and UNSUB awards

Verification

- Bundle #3, 2005 tax forms and schedules
- Bundle #4, 2005 tax forms and schedules, Federal update target enabled for 2005
- Bundle #8, 2006 tax forms and schedules
- Bundle #9, 2006 tax forms and schedules, Federal update target enabled for 2006
- Bundle #13, regulatory updates for 2008