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Oracle's PeopleSoft 8.9 MP1  
Financial Aid Updates for CS  
Bundle #15  
Regulatory Release 4 2008-2009

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June 2008

**ORACLE®**

Regulatory Release 4 2008-2009

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## Regulatory Release 4 2008-2009

**Note.** This document is an update to the *PeopleSoft Enterprise Financial Aid 8.9 MP1 PeopleBook*. It describes the Product Update ID #701895 that was posted to Customer Connection in June 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 #15. Specifically, it discusses the following topics.

- Updates to Fiscal Operations Report and Application to Participate (FISAP).
- Enhancements to Aid Year Rollover.
- New method for FA Term HERA level calculations.
- Update to Transfer Credit Processing for HERA grant candidates.
- New CIP Code enrollment verification for SMART grant disbursements.

## Updates to Fiscal Operations Report and Application to Participate (FISAP)

FISAP has been updated to accommodate 2007-2008 reporting and the 2009-2010 application.

This section includes updates to:

- Assessments and Expenditures.
- Producing the FISAP Report.

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### Assessments and Expenditures

Part II, Section E of the FISAP report lists total expenditures in dollar amounts.

FISAP report information is updated to include a total field within Part II, Section E, Assessment and Expenditures. The new field is labeled Total Title IV, Part A, Subpart I, Grants and is a summation of the following existing fields:

- Total Federal Pell Expenditures.
- Total Academic Competitiveness Grant (ACG).
- Total National SMART Grant.

The report gathers award disbursement information based on financial aid item type setup to calculate the total (A) Pell, (B) ACG and (C) SMART grant expenditures for the aid year. Financial aid item type setup is defined as having a Source of *Federal* and a Federal ID of *Pell*, *ACG*, or *SMART* on the Financial Aid Item Type 1 page. These totals include all students who received a Pell, ACG and/or SMART grant award, regardless of NSLDS loan year.

The system calculates the total for state grant and scholarship expenditures to undergraduates for the award year from award disbursement information based on financial aid item type setup. Financial aid item type setup is defined as having a Source of *State* and a Federal ID of *Grant* or *Scholarship* on the Financial Aid Item Type 1 page. For each term, the student must also be an undergraduate according to their NSLDS loan year (NSLDS loan years 0 through 5). The calculation does not gather award disbursement information for terms when the student is a graduate.

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## Producing the FISAP Report

**Note.** Before using this new FISAP run control component to produce the report in the new aid year and format, be sure to update your security profiles for correct viewing and use.

The page and navigation path have been updated.

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### Page Used to Produce the FISAP Report

Page Name	Object Name	Navigation	Usage
Report on Eligible Aid Applicants for Award Year 2007 - 2008	SFA_RUNCTL_FISAP10	Financial Aid, Fund Management, Generate FISAP Reports, FISAP Report 2009-2010, Report on Eligible Aid Applicants for Award Year 2007 - 2008	Generate the FISAP report.

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### Generating the FISAP Report

Access the Report on Eligible Aid Applicants for Award Year 2007-2008 page.

### Report on Eligible Aid Applicants for Award Year 2007 - 2008

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

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Institution

Aid Year

**Overrides**

SSA Citizenship Override  DHS:INS Match Override

**Print Student List**

Print Student List

Output Type

File Path

Report on Eligible Aid Applicants for Award Year 2007-2008 page.

## Enhancements to Aid Year Rollover

The appearance of the Aid Year Setup page has changed to be consistent with other pages. Changes in function are made to two options on the page, Loan Tables and PELL/ACG/SMART Tables.

This section discusses how to:

- Set up aid year rollover.
- Review table rollover options.

**See Also**

- PeopleSoft Enterprise Financial Aid 8.9 PeopleBook, "Setting Up Your Financial Aid Awarding Cycle"

## Page Used to Define Aid Year Rollover

Page Name	Object Name	Navigation	Usage
Aid Year Setup	RUNCTL_AID_YEAR	Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup	Create aid year specific setup tables from year to year.

## Setting Up Aid Year Rollover

Access the Aid Year Setup page.

## Aid Year Setup

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

### Aid Year Criteria

*SetID	<input type="text" value="PSUNV"/>	Override Aid Year	<input checked="" type="checkbox"/>
*Institution	<input type="text" value="PSUNV"/>	Rollover Inactive Rows	<input type="checkbox"/>
*Copy From Aid Year	<input type="text" value="2007"/>		
*Copy To Aid Year	<input type="text" value="2008"/>		

### Target Year Effective Date Options

Eff Date of Today	<input checked="" type="checkbox"/>	Use Eff Date from Source Table	<input type="checkbox"/>
Eff Date of 01/01/1900	<input type="checkbox"/>		

### General FA Tables Setup

Aid Year Tables	<input type="checkbox"/>	Aggregate Aid Limit Tables	<input type="checkbox"/>
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Term Values Cross Reference setup is required prior to updating the tables below

### Additional FA Tables Setup

FA Term Tables	<input type="checkbox"/>	Return of TIV Tables	<input type="checkbox"/>
Budget Tables	<input type="checkbox"/>	ISIR Tables	<input type="checkbox"/>
FA Item Type Tables	<input type="checkbox"/>	Loan Tables	<input checked="" type="checkbox"/>
Disbursement Rules Tables	<input type="checkbox"/>	PELL/ACG/SMART Tables	<input checked="" type="checkbox"/>
Packaging Tables	<input type="checkbox"/>	Profile Tables	<input type="checkbox"/>

[Aid Year Setup page](#)

**Additional FA Tables Setup**

**Loan Tables**

The Loan Tables option includes CL4 Loan Destination Profile tables as part of the Aid Year Setup process. Because CL4 Loan Destination Profiles cannot be deleted or inactivated, the process copies data to the target year even though loan agencies associated to the destination might no longer be valid, making the destination itself invalid.

To avoid copying invalid CL4 Loan Destination Profiles, the process compares each loan agency (Lender/Guarantor/Servicer) associated to the loan destination against Loan Agency Defaults setup. If any loan agency OPEID from the CL4 Loan Destination Profile matches an OPEID setup on the Loan Agency Defaults page, the destination will not be copied to the target year.

**Note.** During the Aid Year Setup process, the Loan Agency Default tables are copied before the CL4 Loan Destination Profile tables are copied. This enhancement uses Loan Agency Default values from the target year when comparing OPEIDs.

**PELL/ACG/SMART Tables**  
(formerly Pell Payment)

The rollover for the HERA Academic Level Setup page is added with this bundle. Rollover for the ACG/SMART Processing Options, ACG/SMART Reporting Options, ACG State Program Codes, and Eligible CIP Codes for SMART pages was added in Bundle 5.

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## Reviewing Table Rollover Options

This list of Pell/ACG/SMART tables replaces the list of Pell Payment tables.

**Pell/ACG/SMART Tables**

Record Name	Page Name
PELL_PMT_OPTION	Pell Payment Setup
PELL_PMT_CAREER	Pell Payment Setup
PELL_ATTENDING	Pell ID Attending
PELL_COMNT_TBL	Pell Comment Codes
SFA_ASG_OPTION	ACG/SMART Processing Options
SFA_ASG_PARMS	ACG/SMART Reporting Options
SFA_ASG_HS_PROG	ACG State Program Codes
SFA_ASG_CIP_CD	Eligible CIP Codes for SMART
SFA_ASG_AL_TBL	HERA Academic Level Rules Setup

# New Method for FA Term HERA Level Calculations

New functionality in the Financial Aid Term module supports the calculation of HERA academic levels based on the regulations set for ACG and SMART in the October 29, 2007 *Federal Register*. The new method applies to terms beginning in the 2009 aid year. You will continue to apply the current method for calculating HERA levels to terms prior to the 2009 aid year.

**Note.** These changes do not support the recent HR 5715: Ensuring Continued Access to Student Loans Act of 2008. HR 5715 changes to the ACG and SMART grant programs will be addressed in future bundles.

This section provides an overview and discusses how to:

- Set up parameters for the new method.
- Maintain HERA level values for the new method.
- Upgrade after the bundle installation.

This section also includes examples that compare among the various calculation methods, before and after upgrading.

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## Overview of HERA Level Calculations

This overview contains discussions about:

- Calculation components for 2009 and later.
- Comparison between the current method and the new method.
- Calculating HERA levels using the new method.

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## Calculation Components for 2009 and Later

To calculate a student's HERA academic level for a student in 2009 or later, the two components of the institution's federal academic year are measured:

- Total number of completed units.
- Number of completed *weeks of instruction* (WI).

Both components are then used to determine the student's level. The level is based on each component meeting a specific threshold.

In the following examples for calculating HERA academic level and monitoring progression, the term-based institution has a 30-week academic year of 24 units. The Fall and Spring terms are 15 weeks and the Summer term is 10 weeks. Term Units Enrolled and Term Weeks of Instruction are cumulative at the end of the term.

**Example 1: Student enrolls for 12 units each term.**

Term	Term Units Enrolled	Term Weeks of Instruction (WI)	Beginning of Term Level	End of Term Level
Fall 2007	12 (12)	15 (15)	1	1
Spring 2008	12 (24)	15 (30)	1	2
Fall 2008	12 (36)	15 (45)	2	2
Spring 2009	12 (48)	15 (60)	2	3

By the end of the Spring 2008, the student reaches the second year level by meeting the level thresholds for both the units and weeks of instruction.

By the end of the Spring 2009, the student reaches the third year level.

**Example 2: Student begins enrollment in the Spring 2008 term.**

Term	Term Units Enrolled	Term Weeks of Instruction (WI)	Beginning of Term Level	End of Term Level
Spring 2008	12 (12)	15 (15)	1	1
Summer 2008	12 (24)	10 (25)	1	1
Fall 2008	12 (36)	15 (40)	1	2
Spring 2009	12 (48)	15 (55)	2	2

By the end of the student’s Summer 2008, the unit threshold for a second year student is met, but not the WI threshold. The student remains at the first year level at the end of the term.

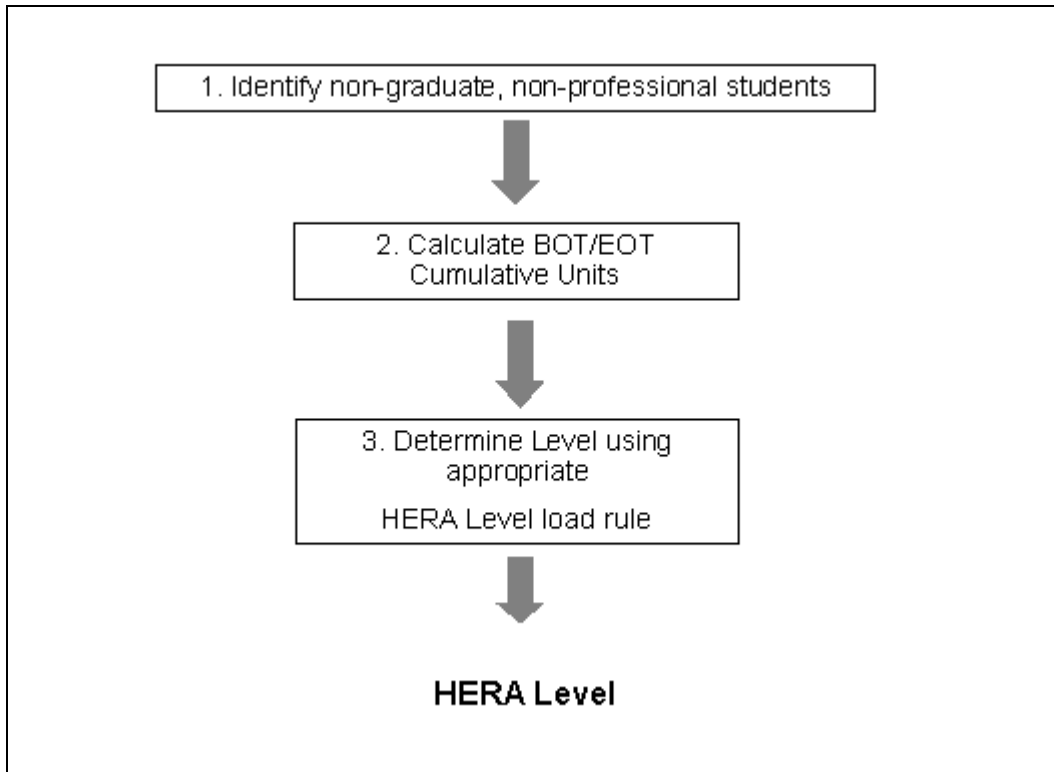
By the end of the Fall 2008, the student completes enough WI to advance to a second year level.

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## Comparing the Current Method to the New Method

The method for calculating student’s HERA level changes significantly for final regulations. The current method is based on the total number of units completed towards the student’s degree and the new method uses weeks of instruction.

The following graphic shows the steps in the current calculation.

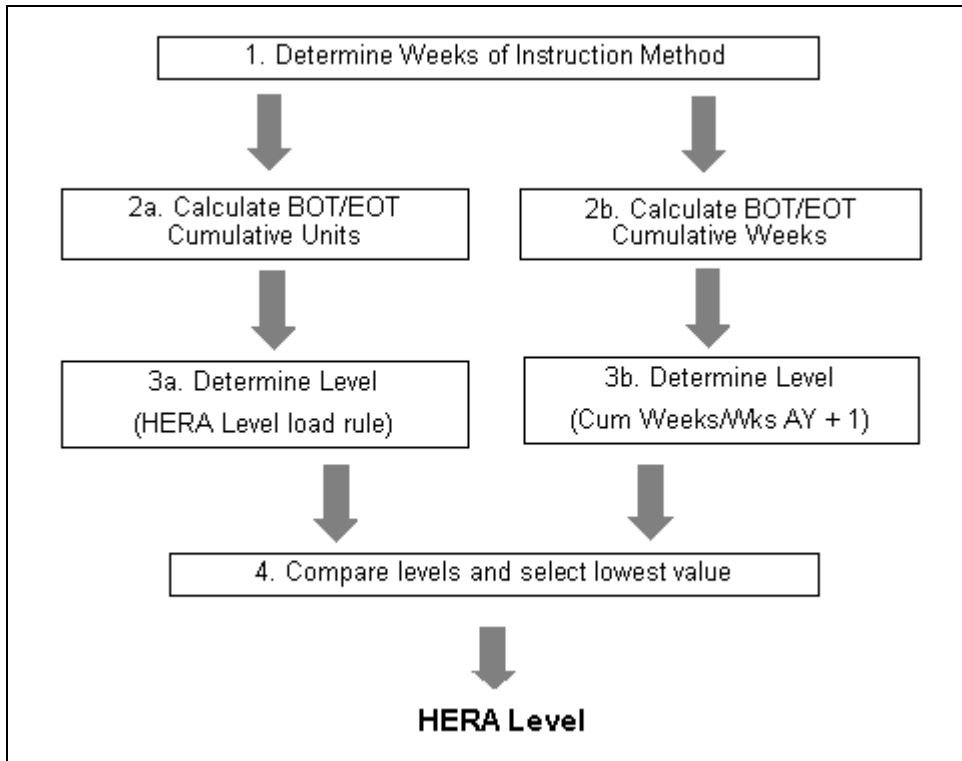


### Calculating HERA academic levels for 2008 and earlier Aid Year

#### See Also

- Oracle's PeopleSoft 8.9 Financial Aid Updates for CS Bundle # 10 Regulatory Release 4 2007-2008, "Changes to Financial Aid Term Processing for ACG/SMART"

The following graphic shows the steps for calculating the new HERA level calculation using weeks of instruction.



[Calculating HERA academic levels for 2009 and later aid years](#)

### Calculating HERA Level Using the New Method

As for earlier aid years, HERA levels are calculated for only non-graduate, non-professional students based on NSLDS year.

The following steps are required to calculate the HERA academic levels for the 2009 and after. This section describes how to:

1. Determine the method for Weeks of Instruction.
- 2a. Calculate Beginning of Term and End of Term Cumulative Units.
- 2b. Calculate Beginning of Term/End of Term Cumulative Weeks.
- 3a. Determine level from Cumulative Units.
- 3b. Determine level from Cumulative Weeks.
4. Compare levels to determine HERA level.

#### Determining the Method for Calculating Weeks of Instruction

Determine which of the following four methods to use for calculating weeks of instruction or ignoring weeks of instruction. Refer to the final regulations to determine which methods are available to your institution.

Method	Description
Exact Accounting	This method derives WI from the scheduled dates of the enrolled classes in the term. The current method for calculating WI for budgets and Pell awarding is used.

Method	Description
Terms Attended	This method assumes that every term has the same WI value, including nonstandard terms. WI equals the number of weeks in a school's academic year divided by the number of payment terms.
Credits Earned	This method derives a WI value by converting the enrolled units for a term to a WI value. The ED formula is (# units in term x #weeks in academic year) / (# of units in academic year).  For example, if a student enrolls in 12 units for a term and the school has a 24 unit, 30 week academic year, the term weeks would be $(12 \times 30)/24 = 15$ weeks of instruction.
Grade Level	This method does not calculate weeks of instruction. The student's HERA level is calculated based on the number of acceptable units completed by the student.  This is calculated by taking the total number of completed units (including transfer units) and then subtracting 'unacceptable' work – Advanced Placement, International Baccalaureate, testing out, life experience, work experience, remedial, and units earned while not in an eligible program. Use the remaining units to derive the HERA level using the HERA academic level rules.

### Calculating Beginning of Term and End of Term Cumulative Units

Calculating cumulative units is similar to calculating cumulative units under the current method. The following table explains how cumulative units are calculated for the three methods that use WI.

Cumulative Units	Projected Term	Enrolled, Term Not Started	Enrolled, Term in Progress	Term Completed
Beginning of Term	All completed units less the current term plus Transfer, Test credit, and other units, less adjustments.  Excess FA Units assigned to remedial type courses are not included.	Same	Same	Same
End of Term	Same units calculated for Beginning of Term plus projected units for the current term.	Same units calculated for Beginning of Term plus Enrolled units for the current term.	Same units calculated for Beginning of Term plus Anticipated, in progress, completed units.	Same units calculated for Beginning of Term plus completed units for the current term.

### Cumulative Units Exception: Grade Level Method

The Grade Level method calculates cumulative units differently than explained above in the treatment of transfer units.

The Grade Level method follows the same rules as the other three methods except for how transfer work is treated. The Grade Level Method does not allow certain transfer work to be included in the cumulative units. The transfer units not allowed are the same as those not allowed in calculating weeks of instruction for the other methods. This includes: Advanced Placement, International Baccalaureate, testing out, life experience, work experience, and units earned while not enrolled in an eligible program. This transfer work is identified in the transfer credit evaluation module during the review for inclusion in the Financial Aid Weeks of Instruction statistics.

The HERA Academic Level page displays the beginning of term and end of term cumulative units in new fields.

## Calculating Beginning of Term/End of Term Cumulative Weeks

To calculate the cumulative weeks of instruction (WI), FA Term first calculates WI for each term the student was enrolled (and expected to enroll for projected terms). If a student has transfer work, a separate WI might also be calculated for those transfer units. Note that WI must be calculated for terms prior to the 2009 aid year. An upgrade script (UPD701895\_A2) identifies the students and terms that need to be rebuilt before calculating the weeks of instruction for each term.

The new **Term Weeks** field on the HERA Academic Level page documents the weeks of instruction per term. Term weeks is usually recalculated when a student's enrollment for a term changes. There are also conditions where the term weeks resets to zero if the student does not enroll or fails to complete any courses.

Calculation of Term Weeks varies depending on when FA Term is run.

Calculation Method	When	How Term Weeks Value Is Calculated
Exact Accounting	<i>Pre-enrollment</i>	Assigns the number of weeks of the default session that is set up for the term.
	During Enrollment	Recalculated based on the schedule of each enrolled course.
	End of Term	Refer to "Resetting Term Weeks to Zero" at the end of this table.
Term	Pre-enrollment	Defaults to the calculated value of the number of weeks in the academic year divided by the number of payment periods in the academic year.
	During Enrollment	Doesn't change
	End of Term	Refer to "Resetting Term Weeks to Zero" at the end of this table.
Credit	Pre-enrollment	Based on the projected enrolled units FA term uses to determine load.
	During Enrollment	Adjusts based on changes to the number of enrolled units.
	End of Term	Refer to "Resetting Term Weeks to Zero" at the end of this table.
Grade Level	Pre-enrollment	<i>Not Applicable</i>
	During Enrollment	<i>Not Applicable</i>
	End of Term	<i>Not Applicable</i>

### Resetting Term Weeks to Zero

The following conditions cause the term weeks to be reset to zero for various calculation methods. Transfer weeks are unaffected by these conditions.

Condition	Methods Affected
<i>Term Source</i> becomes <i>No Data</i> .	Exact, Term, Credit
Student withdraws from term. (Uses same criteria that FA Term driver uses to identify withdrawn students)	Exact, Term, Credit
The Fully Graded date of the term has passed, but the enrolled classes yield no earned units	Credit
The Fully Graded date of the term has passed, but all completed classes yield failed grades.	Credit

### Calculating Transfer Weeks of Instruction

Except for when using the Grade Level method, a weeks of instruction value must also be calculated from a student's transfer work using the formula (# total adjusted transfer units x #weeks in academic year) / # of units in academic year.

# *total adjusted transfer units* is the number of transfer units accepted by the school less any unacceptable transfer work, such as Advanced Placement, International Baccalaureate, testing out, life experience, work experience, remedial, and units earned while not in an eligible program. FA Term automatically calculates transfer weeks of instruction and stores the value in the new **Transfer Weeks** field.

For example, if a student transfers in 15 units (12 regular, 3 AP units) to a 24 unit, 30 week school, the transfer weeks would be  $(12 \times 30) / 24 = 5$  transfer weeks.

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**Warning!** The transfer credit evaluation module was modified in the previous bundle to support identifying the acceptable transfer work to be used in the HERA level calculations. You must review and update previously articulated transfer work prior to the installation of this bundle or the transfer work will not be used to calculate the students' HERA levels.

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### Reviewing and Updating Transfer Credit Information

For information on reviewing and updating transfer credit information, refer to the section in this document titled Update to Transfer Credit Processing for HERA Grant Candidates on page 30.

### Calculating Cumulative Weeks of Instruction

To calculate cumulative weeks, add the Term Weeks and Transfer Weeks values from all prior FA Term rows.

Value	Description
BOT Cumulative Weeks of Instruction	All previous terms Term WI and Transfer WI values where the term end date has passed and at least 1 credit earned plus Current Term Transfer WI.
EOT Cumulative Weeks of Instruction	BOT Cumulative Weeks of Instruction plus Current Term Weeks of Instruction.

## Determining Level from Cumulative Units

Determine the level from cumulative units by applying the academic level rule found in the HERA Level Rules Set Up page.

Here is an example of a HERA level rule a school might create:

Level	Completed Units
1	0-23
2	24-47
3	48-71
4	72-120
5	N/A

A student with 50 cumulative units would have a calculated level of 3.

## Determining Level from Cumulative Weeks

Determine the level from cumulative weeks using this formula:

$$(\text{Cumulative Weeks of Instruction} / \# \text{ of weeks in academic year}) + 1$$

The number of weeks in the academic year is taken from the value in the **Hours/Credit in Acad Year** field on the HERA Weeks of Instruction Set Up page based on the student's career, academic program, or academic plan. There is no rounding of fractional data.

For example, if the cumulative number of weeks is 45 and the number of weeks in the academic year is 30 weeks, the level would be  $(45 \text{ weeks} / 30 \text{ weeks}) + 1 = 2.5$  (second year).

## Comparing Levels to Determine HERA Level

To determine the HERA academic level, compare the levels derived from cumulative units and cumulative weeks and assign the lower value. In the previous examples, if the level from units is 3 and the level from weeks is 2, then the HERA level assigned is 2 (second year).

Note that the grade level method does not calculate a level from weeks. In that case the level calculated from units is assigned as the HERA level from the Cumulative Units calculation.

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## Setting Up Parameters for the New Method

This section describes how to:

- Define the HERA academic level calculation rules.
- Copy setup data from year to year.
- Define parameters for Weeks of Instruction calculations.

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## Pages Used to Set Up Parameters for the New Method

Page Name	Object Name	Navigation	Usage
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Page Name	Object Name	Navigation	Usage
HERA Academic Level Rule Set Up	SFA_ASG_AL_TBL	Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Academic Level Set Up	Set up and maintain the HERA academic level calculation settings for undergraduate students.
Copy HERA Academic Level Set Up	SFA_ASG_AL_COPY	Click the <b>Copy</b> button on the HERA Academic Level Rule Set Up	Copy HERA academic level parameters from one aid year to another.
HERA Weeks of Instruction Set Up	SFA_ASG_WI_TBL	Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Weeks of Instruction	Select parameters used to calculate a weeks of instruction value for non-graduate, non-professional level students.

## Defining the HERA Academic Level Calculation Rules

Access the HERA Academic Level Rule Set Up page.

### HERA Academic Level Rule Set Up

**Academic Institution:** PSUNV PeopleSoft University Copy

**Aid Year:** 2008 Financial Aid Year 2007 - 2008

Career/Program/Plan Set Up						
	Career	Program	Plan	*Academic Level Rule		
1			ART	HE02	+	-
2		FAU		HE01	+	-
3		LAU		HE02	+	-
4	UGRD			UGRD	+	-

### HERA Academic Level Rule Set Up page

The setup structure was modified to be aid year specific to allow flexibility in assigning different Academic Level rules if the rules change from year to year.

Use the **Copy** button to copy setup data from one aid year to another. The Aid Year Rollover process has also been updated to copy this setup information.

## Copying Setup Data from Year to Year

Access the Copy HERA Academic Level Set Up page.

### Copy HERA Academic Level Set Up

Copy From	Copy To
<b>Institution:</b> PSUNV	<b>Institution:</b> PSUNV <input type="text"/>
<b>Aid Year:</b> 2008	<b>Aid Year:</b> 2009 <input type="text"/>

[Copy HERA Academic Level Set Up page](#)

**Warning!** As a result of changing the HERA Academic Level setup to include aid year, you must set up data for every aid year that requires the HERA level to be calculated. The HERA level will not calculate if this setup is missing for a specific aid year. The upgrade script UPD701895\_A1 provided with this bundle automatically populates all aid years that are set up in the Aid Year table. The upgrade script is to be run as part of the Bundle installation. View the setup and add any missing aid year settings before going into production.

## Defining Parameters for Weeks of Instruction Calculations

Access the HERA Weeks of Instruction Set Up page.

### HERA Weeks of Instruction Set Up

**Academic Institution:** PSUNV PeopleSoft University

**Default Set Up**

\*Weeks of Instruction Method: Exact Accounting

\*Academic Calendar Type: Semester/Trimester, 2 payments

Hours/Credits in Acad Year: 24

Weeks in Program Acad Year: 30

Begin Weeks of Inst Calc Term: 0590 2007 Fall

Career/Program/Plan Set Up								Customize	Find	First	1-6 of 5	Last
	Career	Program	Plan	Weeks of Instruction Method	Academic Calendar Type	Hrs/Cred	Weeks Acad Yr					
1	UENG			Credit Based	Quarter, 3 payments	34	30	+	-			
2		FAU		Grade Level Based	Semester/Trimester, 2 payments	24	30	+	-			
3			MUSIC	Credit Based	Semester/Trimester, 2 payments	24	30	+	-			
4			CHEM-BS	Term Based	Semester/Trimester, 2 payments	24	30	+	-			
5			BIOLBS	Grade Level Based	Semester/Trimester, 2 payments	24	30	+	-			

[HERA Weeks of Instruction Set Up page](#)

Use this new page to select and store the parameters used to calculate a weeks of instruction value. These are applied to all non-graduate, non-professional level students.

The **Career/Program/Plan Set Up** group box contains the same calculation parameters that are applied to specific academic careers, academic program, or academic plans. When FA Term calculates a student's HERA level, the process determines which settings to use searching first for the student's academic plan, then the academic program, then academic career. If none is found, FA Term code uses the default setting to calculate the student's weeks of instruction.

### Default Setup

<b>Weeks of Instruction Method</b>	Select the method by which weeks of instruction will be calculated. Values are:  <i>Credit Based</i> <i>Exact Accounting</i> <i>Grade Level Based</i> <i>Term based</i>
<b>Academic Calendar Type</b>	Select the number of regular terms and payment periods. Values are:  <i>Quarter, 3 payments</i> <i>Quarter, 4 payments</i> <i>Semester/Trimester, 2 payments</i> <i>Semester/Trimester, 3 payments</i>
<b>Hours/Credits in Acad Year</b> (hours or credits in the academic year)	Enter the number of hours or credits that defines the academic year.
<b>Weeks in Program Acad Year</b> (weeks in program academic year)	Enter the number of weeks of instruction that defines the academic year.
<b>Begin Weeks of Inst Calc Term</b> (begin weeks of instruction for calculating term)	Enter the first term in which the calculated weeks of instruction will be used to determine the student's HERA academic level. This should be the first term of the 2009 aid year.

**Note.** The Grade Level Method does not require completed **Hours/Credits in Acad Year** or **Weeks in Program Acad Year** fields to perform a HERA level calculation. The information must be provided however, to support the HERA level calculation when a manual override of the student's weeks of instruction method is performed.

## Maintaining HERA Level Values for the New Method

This section describes how to:

- View academic level information.
- Review and update eligibility information.

- View the HERA academic level on FA term.
- View changes in a student's FA term information.
- Override Weeks of Instruction and Method Values.

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## Pages Used to Set Up Parameters for the New Method

Page Name	Object Name	Navigation	Usage
HERA Academic Level	STDNT_FA_ASGAL_SEC	Financial Aid, Financial Aid Term, Maintain Student Financial Aid Term, Acad Level, click the <b>View HERA Academic Level</b> link	Displays the HERA academic levels calculated by FA Term.
ACG/SMART Grant Eligibility	SFA_ASG_ELIG	Financial Aid, ACG/SMART Grants, ACG/SMART Grant Eligibility	Review and update student grant eligibility records.
HERA Academic Level on FA Term	SFA_ASG_ELIGAL_SEC	Click the <b>HERA Level</b> link on the ACG/SMART Grant Eligibility page.	View the HERA level information for the term.

---

## Viewing HERA Academic Level Information

Access the HERA Academic Level page.

HERA Academic Level		
Margo Channing	<b>ID:</b>	FAASG049
<b>Academic Institution:</b> PeopleSoft University	<b>Term:</b>	2009 Spr
<b>Effective Date:</b> 05/28/2008	<b>Seq:</b>	3
HERA Academic Level		
<b>Override</b>	<b>Calculated Values</b>	
<input type="checkbox"/> <b>Beginning of Term:</b> 2nd Year	2nd Year	<b>New Level Method Used</b>
<input type="checkbox"/> <b>End of Term:</b> 2nd Year	2nd Year	
HERA Weeks of Instruction		
<b>Override</b>	<b>Calculated Values</b>	
<input type="checkbox"/> <b>Method:</b> Credit	Credit	
<input type="checkbox"/> <b>Term Weeks:</b> 15.00	15.00	
<input type="checkbox"/> <b>Transfer Weeks:</b> 0.00	0.00	
<b>Cumulative Weeks:</b>		
<b>Beginning of Term:</b> 34.37	<b>N/A</b>	
<b>End of Term:</b> 49.37	<b>N/A</b>	
HERA Cumulative Units		
<b>Units Beginning of Term:</b> 27.500	<b>N/A</b>	
<b>Units End of Term:</b> 39.500	<b>N/A</b>	

[HERA Academic Level page](#)

Use this page to view the results of the FA Term HERA level calculations for both the academic level and weeks of instructions. The HERA academic level is calculated for any non-graduate, non-professional student, based on the NSLDS loan year value in FA Term.

When the HERA levels have been calculated based on the new, final regulations, a message stating so (*New Level Method Used*) is displayed. The message does not display when the HERA levels were calculated based on the previous calculation method. The older method calculates HERA level based on the student’s cumulative units and does not use Weeks of Instruction information.

Use the calculated values to determine whether or not to override any values or parameters. Fields that have been overridden by the user can be expired using the Override Expiration Date functionality.

## HERA Academic Level

### Beginning of Term

Select the student's level based on all completed work and weeks of instruction prior to the current enrolled term. You can base the value on projected information and override it. This is the primary value used for establishing eligibility, awarding, disbursing, and reporting to COD for ACG and SMART grants.

Values are:

*1st Yr Nvr* (first year, never attended college)

*1st Year Prev* (first year, previous college enrollment)

*2nd Year*

*3rd Year*

*4th Year*

### End of Term

Select the student's level based on the student's completed work and weeks of instruction, including the current enrolled term. You can base the value on projected information and override it.

## HERA Weeks of Instruction

This group box displays the weeks of instruction information to be used in determining HERA levels.

### Method

The method by which weeks of instruction was calculated.

Values are:

*Credit Based*

*Exact Accounting*

*Grade Level Based*

*Term based*

For terms where the old HERA level calculation was used, the field can be populated, but not used to determine the HERA levels.

If overridden, the **FA Calc** check box is set for the term, and the weeks of instruction fields are recalculated using the new method during the next batch or online FA Term run.

### Term Weeks

Select the number of weeks of instruction calculated for the term. The value depends on the WI method used.

For terms where the old HERA level calculation was used, the field can be populated. This information will be used in the future terms where level is calculated using the new methods, but the data will not be used to recalculate the levels for terms using the old calculation method.

### Transfer Weeks

Select the number of transfer weeks of instruction calculated for the term. The value depends on the WI method used.

For terms where the old HERA level calculation was used, the field can be populated, but not used to determine the HERA levels.

**Cumulative Weeks – Beginning of Term**

Displays the sum of all term weeks and transfer weeks from prior terms. The value for the current term transfer weeks is included.

This field will not display for terms using the old HERA level calculation method.

**Cumulative Weeks – End of Term**

Displays the beginning of term value plus the value for the current term weeks.

This field will not display for terms using the old HERA level calculation method.

**Note.** Weeks of instruction information can exist for terms where the new HERA academic level calculation was not performed. For example, an ACG or SMART grant candidate was enrolled for terms in the 2007-2008 aid year. Terms in this aid year use the old HERA level calculation logic to determine HERA levels for those terms. The WI information calculated for these terms would be used to determine HERA levels for the 2008-2009 terms by the new HERA level calculation method.

You can override the **Method**, **Term Weeks**, and **Transfer Weeks** fields. However, unlike the other fields in FA Term that can be overridden, an override of these fields is permanent and cannot be reset by using the Override Expiration Date functionality. An override of the method will carry forward when new, future terms are created. See *Overriding Weeks of Instruction and Method Values* on page 24 for more information on how to perform overrides.

The fields that display under the **Calculated Values** column show the system-calculated values for the adjacent field. Use this column to view what FA Term has calculated for an overridden field. The Term Weeks value is calculated based on the active method, not the calculated method.

**HERA Cumulative Units****Units Beginning of Term**

Displays the number of completed units not including the current term. Articulated transfer work for the current term is included. Financial Aid progress units in excess of the units earned towards the student's degree are not included.

If the Grade Level method is used to calculate the HERA level for the term, any transfer work not marked to be included in the HERA level calculation will be excluded.

**Units End of Term**

Displays the beginning of term value plus the current enrolled units. This value will adjust at the end of the term based on whether the enrolled courses have been graded. This value can be projected.

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## Reviewing and Updating Eligibility Information

Access the [ACG/SMART Grant Eligibility](#) page.

ACG/SMART Grant Eligibility
Comments

Eldeera Willis

**Institution:** PSUNV

**Aid Year:** 2008

**ID:** FAASG016

**Grant Type:** Academic Competitiveness

**Term:** 2008 Fall

Find | View All
First 1 of 9 Last

**Ovrd Eligibility Status:** Eligible, pending review      **Status Date:** 06/04/08 3:19:42PM

**HERA Student Level:** 1st Year - Never Attended      **Seq Nbr:** 9

**Eligibility Reason:**      **Source:** System       **Disbursement Protection**

**High School Program:**

**CIP Code:**

**GPA:**

**Other Information**
+

[Financial Aid Status](#)
[External Education](#)
[Student Program](#)

[Term History](#)
[NSLDS Inquiry](#)
[Award Summary](#)

[FA Term](#)
[Transfer Credit - Manual](#)
[HERA Level](#)

Messages
Details

	DateTime	Message Text
1	06/04/2008 3:19:42PM	PASSED: US Citizenship has been confirmed
2	06/04/2008 3:19:42PM	PASSED: Student's official ISIR indicates Pell Eligibility
3	06/04/2008 3:19:42PM	PASSED: The student's FA LOAD is Fulltime.
4	06/04/2008 3:19:42PM	PASSED: Student appears to have posted transfer coursework that requires review.

[ACG/SMART Grant Eligibility page](#)

Two new links are added to the **Other Information** group box.

**Transfer Credit - Manual**      Use this link to resolve transfer credit calculation issues. You must have security access to the Transfer Credit – Manual component to see the link.

**HERA Level**      Use this link to open a display version of the HERA Academic Level information in the Financial Aid Term component.

---

## Viewing the HERA Academic Level on FA Term

Access the HERA Academic Level on FA Term page.

HERA Academic Level on FA Term			
Eldeera Willis		ID: FAASG016	
Institution: PSUNV		Grant Type: Academic Competitiveness	
Aid Year: 2009		Term: 2008 Fall	
HERA Academic Level			
Override	Calculated Values		
<input type="checkbox"/> Beginning of Term:	1st Yr Prv	1st Yr Prv	<b>New Level Method Used</b>
<input type="checkbox"/> End of Term:	1st Yr Prv	1st Yr Prv	
HERA Weeks of Instruction			
Override	Calculated Values		
<input type="checkbox"/> Method:	Exact	Exact	
<input type="checkbox"/> Term Weeks:	15.00	15.00	
<input type="checkbox"/> Transfer Weeks:	0.00	0.00	
<b>Cumulative Weeks:</b>			
Beginning of Term:	0.00	N/A	
End of Term:	15.00	N/A	
HERA Cumulative Units			
Units Beginning of Term:	3.000	N/A	
Units End of Term:	15.000	N/A	

[HERA Academic Level on FA Term page](#)

Use this new page to quickly view the HERA level information for the term without opening the FA Term component.

---

## Viewing Changes in a Student’s FA Term Information

Changes to an audited field will cause a new FA Term row to be created for the term on the FA Term Field Audits page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Financial Aid Info, click **Field Audits**).

The following audit fields have been added with this bundle:

- SFA\_ASG\_WI\_CUM\_BOT
- SFA\_ASG\_WI\_CUM\_EOT
- SFA\_ASG\_UNITS\_BOT
- SFA\_ASG\_UNITS\_EOT
- SFA\_ASG\_WI\_TCR
- SFA\_ASG\_WI\_TRM

Here is the complete list of 42 fields that are now audited by FA Term:

ACAD\_CAREER

ACAD\_LEVEL\_BOT  
ACAD\_LEVEL\_EOT  
ACAD\_LEVEL\_PROJ  
ACAD\_PLAN  
ACAD\_PLAN\_TYPE  
ACAD\_PROG\_PRIMARY  
ACAD\_SUB\_PLAN  
ACADEMIC\_LOAD  
ADMIT\_TERM  
CAMPUS  
COURSE\_LD\_PCT  
CUM\_GPA  
CUM\_RESIDENT\_TERMS  
CUR\_RESIDENT\_TERMS  
EXP\_GRAD\_TERM  
FA\_LOAD  
FA\_LOAD\_CURRENT  
FA\_NUMBER\_OF\_WEEKS  
FA\_REBUILD\_DT  
FA\_UNIT\_ANTIC  
FA\_UNIT\_COMPLETED  
FA\_UNIT\_CURRENT  
FA\_UNIT\_IN\_PROG  
FORM\_OF\_STUDY  
LS\_GPA  
SFA\_ASG\_AC\_LVL\_BOT  
SFA\_ASG\_AC\_LVL\_EOT  
SFA\_ASG\_WI\_CUM\_BOT  
SFA\_ASG\_WI\_CUM\_EOT  
SFA\_ASG\_UNITS\_BOT  
SFA\_ASG\_UNITS\_EOT  
SFA\_ASG\_WI\_TCR  
SFA\_ASG\_WI\_TRM  
STUDY\_AGREEMENT  
TERM\_SRC

TOT\_PASSD\_FA  
TOT\_TAKEN\_FA  
UNT\_PASSD\_FA  
UNT\_TAKEN\_FA  
WEEKS\_OF\_INSTRUCT  
WITHDRAW\_CODE

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## Overriding Weeks of Instruction and Method Values

You can override the weeks of instruction values for a specific term and have the override values used in the HERA level calculations. You can also override the weeks of instruction method and recalculate the HERA level based on the new method.

Unlike other fields in FA Term that can be overridden, an override of WI fields is permanent and cannot be reset by using the Override Expiration Date functionality. The HERA Academic Level **Beginning of Term** and **End of Term** fields continue to adhere to the override expiration date. An overridden term weeks or transfer weeks has impact beyond the current term. This is because the cumulative weeks value is calculated by adding the term week and transfer week values from all previous terms. Therefore, HERA level calculations for any subsequent terms are impacted by any overrides of these fields.

Before overriding any HERA level calculation fields, consider the effect on:

- Terms prior to 2009 that were calculated under the old HERA level method. The HERA academic levels for these terms will not be affected by any override of the calculation method or the term weeks value or transfer weeks value. HERA levels calculated under the old method will not display the *New Level Method Used* message on the page.
- Beginning of term HERA level is calculated using the current term transfer weeks value. That is consistent with how transfer work is treated in FA Term. If the transfer weeks value is overridden, make sure to check the impact on the beginning of term level after rebuilding the term.
- Beginning of term HERA level is not calculated based on the current term weeks value. Term weeks is considered in the end of term cumulative weeks and end of term HERA level calculations.
- New, future term records created after an override of the method in the most recent term will be assigned the override method. This will not occur for terms already created.

For the following override cases, the procedures must be followed to ensure correct calculation of the student's HERA levels.

Override Case	Required Procedure
<p>Student requests an exact accounting of their weeks of instruction.</p>	<p>When this occurs, this calculation method becomes a permanent change for the student. This assumes that the current calculation method is not the Exact Accounting method.</p> <p>Step 1: For each active FA Term, override the method to Exact. This sets the <b>FA Calc</b> check box.</p> <p>Step 2: If the HERA level should not be recalculated using the new method for any past terms, lock the HERA level by checking the override check box for the HERA levels.</p> <p><b>Note.</b> This does not apply to terms calculated using the older pre-2009 calculation method. The levels for these terms are unaffected by the changing of the method.</p> <p>Step 3: Run FA Term build. This rebuilds all the terms, recalculates the term weeks using the Exact Accounting method, and recalculates the HERA levels.</p> <p>When future terms are created, the override method will be assigned.</p>
<p>Delivered setup does not allow for the correct assignment of the calculation method.</p>	<p>A school may have a specific population of students that must have a different method used instead of the one assigned based on the Weeks of Instruction setup.</p> <p>Step 1: Identify the affected students.</p> <p>Step 2: For each active FA Term, override the method to the appropriate value. This sets the <b>FA Calc</b> check box.</p> <p>Step 3: Rebuild FA Term to recalculate all HERA level information.</p> <p>When future terms are created, the override method will be assigned.</p>

Override Case	Required Procedure
<p>Student changes major, which causes a different WI method to be used.</p>	<p>The cumulative weeks of instruction must be adjusted so that they are correct in the first term of the new major. Do this by updating the weeks of instruction for all prior terms. Care must be taken to ensure that the HERA levels from the prior terms are not affected. This procedure is similar to an exact accounting request.</p> <p>Step 1: Lock the HERA levels for all prior terms.</p> <p><b>Note.</b> You do not need to lock levels for terms that use the current HERA level calculation method.</p> <p>Step 2: Override the Method for all prior terms so that they match the method used for the new major.</p> <p>Step 3: Rebuild FA Term so that the weeks of instruction are recalculated.</p>
<p>School does not use transfer credit module, but needs to document and apply the transfer weeks of instruction to their HERA level calculations.</p>	<p>Schools must perform a manual calculation of their transfer weeks of instruction, but once entered, the HERA levels will calculate correctly in the future.</p> <p>Step 1: Establish a procedure for identifying students with transfer work that will require review. For example, an equation could be created that identifies such students when the grant evaluation process is run, <i>if</i> there is a data attribute that defines this population. This could also be a report generated from an external system.</p> <p>Step 2: Calculate the transfer weeks of instruction manually.</p> <p>Step 3: Determine the articulation term for the transfer work. Note the current calculation method assigned to the term.</p> <p>Step 4: If the method is Exact, Term, or Credit, enter in the transfer weeks into field and set the override check box. If the method is (Grade) Level, do not enter any transfer weeks.</p> <p>Step 5: Make sure transfer units have been entered in Student Records.</p> <p><b>Note.</b> We are assuming that schools who do not use the transfer credit module already have a method in place for adding the transfer work into Student Records which is then accessible by FA Term.</p> <p>Step 6: Rebuild FA Term.</p>

## Upgrading After the Bundle Installation

Three upgrade scripts support the new HERA level calculations and are performed as part of the bundle installation:

1. The UPD701895\_A1 upgrade script populates the HERA Academic Level set up records with new data. The script copies the school's current settings to all defined aid years. Verify that the setup information exists for your aid years. Use the **Copy** button on the page to copy setup information to any missing years. If you need to change your settings for a specific aid year, do so now before doing any other production activity.
2. The UPD701895\_A2 upgrade script identifies all FA Term records that will need to be rebuilt for the new weeks of instruction information to be calculated. For each student identified, the FA Calc flag in FA Term will be set for every term. You can run this script more than once.
3. The UPD701895\_A3 upgrade script ensures that the transfer work reviewed and updated in advance of the delivery of this bundle is used by FA Term. The script updates the FA Stats Calc flag in the Student Career Term records for all students that have Weeks of Instruction statistics for transfer coursework, transfer test credit, and transfer other units. You can run this script more than once.

After bundle installation, perform the following two steps before going into production. These steps are not listed in the installation documentation. These steps need to be handled by Financial Aid staff members who are familiar with running FA Term in batch. Run these steps prior to any other production activity; otherwise incorrect weeks of instruction calculations in FA Term will arise.

1. Set up the new HERA Weeks of Instruction so that the FA Term build process can calculate weeks of instruction and HERA levels. (Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Weeks of Instruction)
2. Run the batch FA Term processes to calculate new HERA academic level information for your students. This should take more time to complete than your normal scheduled FA Term jobs since more FA term records must be rebuilt for the upgrade. This batch run must use the highest Aid Year value that has been used in previous batch FA Term runs; otherwise the weeks of instruction calculations will be inaccurate.

## Upgrade Examples

Examples in this section compare results on the new HERA Academic Level page among the following:

- Prior to applying this bundle upgrade code and scripts, and rebuilding FA Term records.
- After bundle upgrade and rebuild, using Term WI method.
- After bundle upgrade and rebuild, using Grade Level WI method.
- After bundle upgrade and rebuild, using Credit WI method.

### Pre-bundle HERA level information

In a 24-unit, 30-week, semester (2 payment periods) school, a second year student's HERA level information would look like this:

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
HERA Academic Level				
Beginning of Term	1 <sup>st</sup> Year	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year
End of Term	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year
New Calculation message displays?	No	No	No	No

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
<b>Weeks of Instruction</b>				
Method	N/A	N/A	N/A	N/A
Term Weeks	N/A	N/A	N/A	N/A
Transfer Weeks	N/A	N/A	N/A	N/A
<b>Cumulative Weeks</b>				
Beginning of Term	N/A	N/A	N/A	N/A
End of Term	N/A	N/A	N/A	N/A
<b>Cumulative Units</b>				
Beginning of Term	N/A	N/A	N/A	N/A
End of Term	N/A	N/A	N/A	N/A
Units Enrolled	12	12	16	0
Units Transferred	0	0	8	0

**Results after upgrade and rebuild, using Term method**

For the same student, the results change after applying the upgrade, rebuilding the FA Term records, and using the Term method for all undergraduate students. The Fall 2008 term is in progress.

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
<b>HERA Academic Level</b>				
Beginning of Term	1 <sup>st</sup> Year	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year
End of Term	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year
New Calculation message displays?	No	No	Yes	Yes
<b>Weeks of Instruction</b>				
Method	Term	Term	Term	Term
Term Weeks	15	15	15	15
Transfer Weeks	0	0	10	0
<b>Cumulative Weeks</b>				
Beginning of Term	N/A	N/A	40	30
End of Term	N/A	N/A	55	45
<b>Cumulative Units</b>				
Beginning of Term	0	12	32	32
End of Term	12	24	48	44

Note that for the Term method:

- Weeks of instruction information is calculated for all terms, but is not used to recalculate the

HERA levels for terms in which the new calculation message does not display.

- Cumulative weeks are hidden for terms in which the new calculation message does not display.
- Only transfer work counted in the **Include in FA WI Stats** fields is used to calculate Transfer Weeks. All accepted transfer units are counted in Cumulative Units.
- Beginning with the Fall 2008 term, weeks of instruction was used to calculate HERA levels.
- Spring 2009 is based on projected enrollment.

**Results after upgrade and rebuild, using Grade Level method**

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
<b>HERA Academic Level</b>				
Beginning of Term	1 <sup>st</sup> Year	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year
End of Term	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	2 <sup>nd</sup> Year
New Calculation message displays?	No	No	Yes	Yes
<b>Weeks of Instruction</b>				
Method	Grade Level	Grade Level	Grade Level	Grade Level
Term Weeks	0	0	0	0
Transfer Weeks	0	0	0	0
<b>Cumulative Weeks</b>				
Beginning of Term	N/A	N/A	0	0
End of Term	N/A	N/A	0	0
<b>Cumulative Units</b>				
Beginning of Term	0	12	32	32
End of Term	12	24	48	44

Note that for the Grade Level method:

- The weeks of instruction fields are display only since the information is not used.
- Only transfer work counted in the **Include in FA WI Stats** fields is included in the cumulative units.

**Results after upgrade and rebuild, using Credit method**

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
<b>HERA Academic Level</b>				
Beginning of Term	1 <sup>st</sup> Year	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	2 <sup>nd</sup> Year
End of Term	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	2 <sup>nd</sup> Year

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
New Calculation message displays?	No	No	Yes	Yes
<b>Weeks of Instruction</b>				
Method	Credit	Credit	Credit	Credit
Term Weeks	15	15	20	15
Transfer Weeks	0	0	10	0
<b>Cumulative Weeks</b>				
Beginning of Term	N/A	N/A	40	30
End of Term	N/A	N/A	60	45
<b>Cumulative Units</b>				
Beginning of Term	0	12	32	32
End of Term	12	24	48	44

Note that for the Credit method:

- Weeks of instruction information is calculated for all terms, but is not used to recalculate the HERA levels for terms in which the new calculation message does not display.
- Cumulative weeks are hidden for terms in which the new calculation message does not display.
- Only transfer work counted in the **Include in FA WI Stats** fields is used to calculate Transfer Weeks. All accepted transfer units are counted in Cumulative Units.
- Beginning with the Fall 2008 term, weeks of instruction was used to calculate HERA levels.
- Spring 2009 is based on projected enrollment.

## Update to Transfer Credit Processing for HERA Grant Candidates

In Bundle #14 for Regulatory Release 3, changes were made to the Transfer Credit Evaluation module to support the new HERA academic level calculations. To ensure that an accurate HERA level calculation is performed for your ACG and SMART grant candidates, all transfer work must be reviewed and updated using the changes delivered in that bundle.

The review of a student’s transfer work requires that you identify all acceptable transfer work to be used to either calculate a *Transfer Weeks of Instruction* value, or be included in the cumulative units for the Grade Level calculation method.

**Note.** The procedures outlined in this section have been updated from the procedures delivered in Bundle #14 for Regulatory Release 3.

This section discusses how to:

- Review previously completed transfer evaluations.
- Review new transfer credit.
- Use an equation to identify grant candidates with transfer credit that may require review.

---

## Reviewing Previously Completed Transfer Evaluations

Transfer work is considered articulated when the transfer credit evaluation process has already been completed for a student. Articulated transfer work has a model status of *Posted*.

This section provides an overview and discusses how to:

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

---

### Overview of Steps to Review Transfer Work

To ensure that the FA Term process uses any articulated transfer work to calculate HERA levels, you must perform the following tasks.

**Note.** Since these tasks require the use of the transfer credit evaluation module, collaboration with the Student Records staff is required. This information supplements the current transfer credit evaluation documentation in PeopleBooks.

1. Un-post the transfer credit for the student.

**Note.** This step was not specified in the Bundle #14 for Regulatory Release 3 instructions.

2. Verify that the articulated transfer courses, test credits, and other credits have been correctly updated to indicate whether the transfer work will be used to calculate a *Transfer Weeks Of Instruction* value.
3. 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. For schools using the Grade Level method, the transfer course will be included in the student's cumulative units.
4. Post the recalculated transfer credit. This ensures that the FA Calc Flag in the Student Career Term record for the student is set. You must re-post the transfer work even if no changes were made.

**Note.** This step was not specified in the Bundle #14 for Regulatory Release 3 instructions.

5. 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.

## Pages Used to Review Transfer Work

Page Name	Object Name	Navigation	Usage
Transfer Course Entry	TRNS_CRSE_ENTRY	<ul style="list-style-type: none"> <li>Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Transfer Course Entry</li> <li>Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Transfer Course Entry</li> </ul>	Set up course transfer credit models and articulate transfer credit manually as you set up models rather than by using predefined equivalency rules.
Equivalent Course Information	TRNS_CRSE_INT_SEC	Click the <b>Details</b> link on the Transfer Course Details page to edit 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	<ul style="list-style-type: none"> <li>Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Course Credits by Term</li> <li>Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Course Credits by Term</li> </ul>	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of the model.
Test Credit Entry	TRNS_TEST_ENTRY	<ul style="list-style-type: none"> <li>Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit Entry</li> <li>Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit Entry</li> </ul>	Set up test transfer credit models and articulate transfer credit by creating test transfer models manually rather than by using predefined equivalency rules.

Page Name	Object Name	Navigation	Usage
Equivalent Course Information	TRNS_TEST_EDIT_SEC	Click the <b>Edit Equivalent Course</b> 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.
Test Credit by Term	TRNS_TEST_TERM	<ul style="list-style-type: none"> <li>Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit by Term</li> <li>Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit by Term</li> </ul>	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of a transfer credit model.

**Note.** The Transfer Other Credits components have also been updated with the same changes as the transfer coursework and test credit components. They are not documented in this section because other credits do not require review for inclusion in the new HERA level calculations.

## Reviewing Articulated Transfer Coursework

This section demonstrates the steps outlined in the overview as applied to reviewing articulated transfer coursework.

### Step 1: Unpost the transfer work.

Access the Course Credits by Term page.

Transfer Course Entry		Course Credits by Term	
Student Test1		FAASG001	
<b>Transfer Credit Model</b> <span style="float:right">Find   View All First 1 of 1 Last</span>			
Academic Career:	UGRD	Undergraduate	
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	LAU	Liberal Arts Undergraduate	
<b>Admit Type/Term:</b>			
<span style="float:right">Find   View All First 1 of 1 Last</span>			
Articulation Term:	2007 Fall	Posted Date:	06/12/2008
Model Status:	Complete	User ID:	Betty Locherty
		<input type="button" value="Calculate"/> <input type="button" value="Post"/> <input type="button" value="Unpost"/>	
Units Taken:	8.00		
Units Transferred:	6.000		
<b>Include in FA WI Stats</b>			
Units Taken:	0.00		
Units Transferred:	0.000		
<b>Course Credits Summary</b>			
Units Taken:	8.00		
Units Transferred:	6.000		

[Course Credits by Term page](#)

Click the **Unpost** button to run the Unpost process. Unposting causes the student’s transfer work to be removed from the student career term record. This transfer work must be reposted once you have completed your review.

**Step 2: Review transfer coursework.**

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

Academic Institution: PSUNV PeopleSoft University

\*Model Nbr: 1

\*Transcript Level: Unofficial

**Target Information**

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

Academic Plan: UNDECL-UG Undeclared Undergraduate

**Source Information**

\*Credit Source Type: Manual

Source Institution: Transfer School

School Type: NA Not Applicable

**Transfer Credit Term** Find | View All First 1 of 1 Last

\*Articulation Term: 0590 2007 Fall Submitted

**Transfer Credit Term** Find | View All First 1 of 2 Last

*Group*Seq#	Incoming Course	Equivalent Course
1 1	Year: 2005 Ext Term: FALL Subject: MATH Course Nbr: 1 Description: Math 1 Units Taken: 4.00 Grade Input: A	Course ID: 001005 MATH Offer Nbr: 1 111 Units Transferred: 3.000 Grading Scheme: UGD Undergrad Grading Basis: GRD Graded Official Grade: T Transfer

Accepted

[Details](#)

[Comments](#)

[Add/View Comments](#)

### Transfer Course Entry page

Use this page to review all coursework accepted by the school. The coursework is displayed by term in the **Transfer Credit Term** group box. Review each accepted course and verify the courses to be used in the *Transfer Weeks Of Instruction* calculation. Note that when the transfer credit evaluation is complete, the field is not accessible and the field name is grayed out.

**Note.** Transfer coursework can be stored in more than one model and for more than one term. Be sure to review all courses.

Use the **Details** button to access the Equivalent Course Information page for each course.

### Equivalent Course Information

#### Incoming Course

Term Year:

Subject:  Course Nbr:

Description:

Units Taken:  Grade Input:  Crse Level:

#### Equivalent Course

Course ID:  Calculus I

Offer Nbr:  MATH 111

Units Transferred:   Valid Attempt

Grading Scheme:  Undergraduate Grading Scheme Grd Pt/Unt: 4.000

Grading Basis:  Graded  Earn Credit

Official Grade:  Excellent  Include in GPA

Repeat Code:

Designation:   Include in FA WI Stats

Units Att: Yes

[Equivalent Course Information page](#)

Use the **Include in FA WI Stats** check box at the bottom of this page to include or exclude each course in the weeks of instruction statistics. For courses that are eligible, select the check box.

Continue until all courses have been reviewed, then go to Step 3.

**Step 3: Recalculate the transfer work**

Access the Course Credits By Term page.

Transfer Course Entry		Course Credits by Term	
Student Test1		FAASG001	
<div style="text-align: right;">Find   View All First 1 of 1 Last</div>			
<b>Academic Career:</b>	UGRD	Undergraduate	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University	
<b>Model Nbr:</b>	1		
<b>Academic Program:</b>	FAU	Fine Arts Undergraduate	
<b>Admit Type/Term:</b>			
<div style="text-align: right;">Find   View All First 1 of 1 Last</div>			
<b>Articulation Term:</b>	2007 Fall	<b>Posted Date:</b>	03/25/2008
<b>Model Status:</b>	Posted	<b>User ID:</b>	Betty Locherty
<input type="button" value="Calculate"/> <input type="button" value="Post"/> <input type="button" value="Unpost"/>			
<b>Units Taken:</b>	3.00		
<b>Units Transferred:</b>	3.000		
<b>Include in FA WI Stats</b>			
<b>Units Taken:</b>	0.00		
<b>Units Transferred:</b>	0.000		
<b>Course Credits Summary</b>			
<b>Units Taken:</b>	3.00		
<b>Units Transferred:</b>	3.000		

### Course Credits by Term page

Click the **Calculate** button. This will cause any acceptable transfer work to be populated in the **Include In FA WI Stats** group box. This is the information that FA Term will use when determining the student's HERA levels. A successful calculation will result in the **Post** button becoming active.

Find   View All First 1 of 1 Last			
<b>Articulation Term:</b>	2007 Fall	<b>Posted Date:</b>	06/12/2008
<b>Model Status:</b>	Submitted	<b>User ID:</b>	Betty Locherty
<input type="button" value="Calculate"/> <input type="button" value="Post"/> <input type="button" value="Unpost"/>			
<b>Units Taken:</b>	8.00		
<b>Units Transferred:</b>	6.000		
<b>Include in FA WI Stats</b>			
<b>Units Taken:</b>	8.00		
<b>Units Transferred:</b>	6.000		
<b>Course Credits Summary</b>			
<b>Units Taken:</b>	0.00		
<b>Units Transferred:</b>	0.000		

### 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.

**Step 4: Post the transfer work.**

Finally, run the **Post** process. This updates Course Credit Summary data and updates the student career term record with the transfer credit. FA Term checks the student career term record to determine if there is any updated transfer work. If the work is not reposted, FA Term will not use the transfer work.

When reviewing previously posted work, you must repost the work whether or not you made any changes.

## Reviewing Articulated Transfer Test Credits

This section demonstrates the steps outlined in the overview as applied to reviewing articulated transfer coursework.

**Note.** We do not expect most schools to need to review their transfer test credits. Test credits generally cannot be used in determining the transfer weeks of instruction. Follow the same steps as for transfer course credit using the transfer test credit pages.

**Step 1: Unpost the transfer test credits.**

Access the Test Credit by Term page.

Test Credit Entry		Test Credit by Term	
Student Test1	FAASG001		
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:	2008 Spr	Posted Date:	06/12/2008
Model Status:	Complete	User:	Betty Locherty
		Calculate	Post
		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**

Click the **Unpost** button to run the Unpost process. Unposting causes the student’s transfer test credit to be removed from the student career term record. This transfer work must be reposted once you have completed your review.

**Step 2: Review the transfer test credits.**

Access the Test Credit Entry page.

The screenshot shows the 'Test Credit Entry' page for student Julius Welch (FAASG022). The page is divided into several sections:

- Student Information:** Academic Career: UGRD (Undergraduate), Academic Institution: PSUNV (PeopleSoft University), \*Model Nbr: 1, \*Transcript Level: Unofficial.
- Target Information:** \*Academic Program: LAU (Liberal Arts Undergraduate), Academic Plan: BIOLBS (Biology (BS)). There is a checkbox for 'Include in GPA'.
- Articulation Term:** \*Articulation Term: 0570, 2006 Fall, Posted.
- Table:** A table with columns: \*Group, \*Seq#, Status, Test ID, Test Component, Equivalent Subject / Catlg Nbr. One row is visible: Group 1, Seq# 1, Status Posted, Test ID AP, Test Component MAB, Equivalent Subject / Catlg Nbr MATH 111. There are icons for 'Edit Equivalent Course' and 'Add/View Comments' next to this row.

**Test Credit Entry page**

Use this page to evaluate the transfer test credits.

**Note.** 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.

Click the **Edit Equivalent Course** button on the Test Credit Entry page to access the Equivalent Course Information page.

The screenshot shows the 'Equivalent Course Information' page, divided into two main sections:

- 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: [empty].
- Equivalent Course:** Course ID: 001005 (Calculus I), Offer Nbr: 1 (MATH 111), Units Transferred: 3.000, Grading Scheme: UGD (Undergraduate Grading Scheme), Grading Basis: GRD (Graded), Official Grade: T (Transfer), Repeat Code: [empty], Designation: [empty]. There are checkboxes for 'Valid Attempt', 'Earn Credit', 'Include in GPA', and 'Include in FA WI Stats' (which is highlighted with a red box). Grd Pt/Unt: 3.000, Units Att: Yes.

**Equivalent Course Information page**

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

### Step 3: Recalculate the transfer test credits.

Access the Test Credit By Term page.

The screenshot displays the 'Test Credit by Term' page for student 'Student Test1' (FAASG001). The page is divided into several sections:

- Student Information:** Academic Career: UGRD (Undergraduate), Academic Institution: PSUNV (PeopleSoft University), Model Nbr: 1, Academic Program: LAU (Liberal Arts Undergraduate).
- Articulation Term:** 2008 Spr, Posted Date: 06/12/2008, Model Status: Submitted, User: Betty Locherty.
- Units Transferred:** 3.000
- FA Weeks of Instruction Stats:** Units Transferred: 0.000
- Test Credits Summary:** Units Transferred: 0.000

Buttons for 'Calculate', 'Post', and 'Unpost' are visible. The 'Calculate' button is highlighted with a red box.

### Test Credit by Term page

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

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

### Step 4: Post the transfer test credits.

Run the **Post** process. This updates Test Credits Summary data and updates the student career term record with the transfer test credit. FA Term checks the student career term record to determine if there is any updated transfer work. If the work is not reposted, FA Term will not use the transfer work.

## Reviewing New Transfer Credit

Ideally, Transfer Credit Evaluation staff could be trained to update the transfer work for the Financial Aid office during their processing of new transfer coursework. When new transfer work is evaluated, the following occurs:

- All newly entered transfer coursework will be set with the **Include in FA WI Stats** check box selected. For transfer coursework, this would be the correct setting to make in most cases.
- All newly entered transfer test credits will be set with the **Include in FA WI Stats** check box not selected. This is because test credits are not usually included in the *Transfer Weeks Of Instruction* calculation.

- All newly entered transfer other credit sources will be set with the **Include in FA WI Stats** check box not selected. Other credits refer to work and life experience credits. Currently, these credits cannot be included in the *Transfer Weeks Of Instruction* calculation.

With the above behavior in place for new transfer work, schools need only to identify the conditions in which the default behavior is not valid and update the **Include in FA WI Stats** check box appropriately.

All new transfer work will be calculated and posted as part of completing the overall transfer credit evaluation process.

## Using an Equation to Identify Grant Candidates with Transfer Credit Requiring Review

If your school was unable to review students' articulated transfer work prior to the delivery of this bundle, use the FAASSWEEKINS equation to identify potential review candidates when running the grant eligibility process.

This equation is designed to set the review flag, so it would prevent an eligibility record from being set to an *Eligible* or *Ineligible* status. For any new transfer work that needs to be updated, you must rebuild FA Term to recalculate the HERA level of the student, and then rerun the eligibility process.

### FAASSWEEKINS Equation

Description	Checks for any posted transfer coursework for the student where no FA Weeks Calculation Statistics have been calculated.
Results	PASSED, REVIEW FLAG set to Y PASSED, REVIEW FLAG set to N

<p><b>Design Notes</b></p>	<ol style="list-style-type: none"> <li>1. Get the max effective dated, ACTIVE row in STDNT_FA_TERM for the student with the same term value and get the career (ACAD_CAREER), academic program (ACAD_PROG_PRIMARY) and academic plan (ACAD_PLAN) values.</li> <li>2. Using the EMPLID, ACAD_CAREER, ACAD_PROG and ACAD_PLAN, look for a match in PS_TRNS_CRSE_SCH</li> </ol> <p>Where any of the following fields is greater than 0 TRF_TAKEN_GPA, TRF_TAKEN_NOGPA, TRF_PASSED_GPA, TRF_PASSED_NOGPA, UNT_TAKEN, UNT_TRNSFR</p> <p>If no row exists, then Result = PASSED. Message (14426, 5160): No posted transfer coursework for the student's career, program, and plan.</p> <p>If a row exists, check PS_TRNS_CRSE_TERM (join on EMPLID, ACAD_CAREER, INSTITUTION, MODEL_NBR)</p> <p>Check the value of these fields: SSR_FAWI_TKN, SSR_FAWI_TKN_GPA, SSR_FAWI_TKN_NOGPA, SSR_FAWI_PSD, SSR_FAWI_PSD_GPA, SSR_FAWI_PSD_NOGPA</p> <p>If any is greater than 0, then Result = PASSED Message (14426, 5161): Transfer weeks of instruction review appears to have been completed.</p> <p>If none (all fields are 0 or blank), then set REVIEW_FLAG to Y and Result = PASSED Message (14426, 5162): Student appears to have posted transfer coursework that requires review.</p> <p><b>Note.</b> Equation cannot determine if any posted transfer work with 0 in the FAWI fields was reviewed and no units were allowed. For example, all credit was earned while enrolled in an ineligible program or the credits were exclusively AP or International Baccalaureate (IB) courses.</p>
<p><b>Suggested local modification</b></p>	<p>Can be used as a template for creating an equation that checks the transfer test credit or other transfer credit records.</p>

## New CIP Code Enrollment Verification for SMART Grant Disbursements

This section discusses the changes to the item type disbursement rules.

The new **SMART Enrollment Verification** drop down list is added to the Disbursement Rules: Item Type - Indicators page so you can verify that the student is enrolled in at least one class for the student’s SMART grant eligible major.

The student’s enrolled classes are checked for a matching eligible Classification of Instructional Programs (CIP) code established in the ACG/SMART Grant Eligibility page. Institutions can assign a CIP code to individual classes through two tables:

- Course Catalog Table
- Academic Subject Table

Both the course catalog and academic subject are attributes of a class. The rule controls where the disbursement authorization process checks for the matching CIP code.

**Note.** The assignment of CIP codes in the Course Catalog Table or Academic Subject Table is not required setup and so this rule may not be available to all institutions. Financial Aid administrators should first consult with their Student Records staff to determine if this rule can be used, and the appropriate setting.

In addition, the rule does not take into consideration any individual override of the student’s enrolled courses by their academic advisor. An academic advisor could determine that an enrolled course is acceptable for the student’s major regardless of the setup. These cases cannot be recognized by the new rule and would need to be authorized using the current disbursement override functionality.

## Page Used to Define Authorization Rules for a Financial Aid Item Type

Page Name	Object Name	Navigation	Usage
Disbursement Rules: Item Type - Indicators	DISB_RULE_ITM1	Setup SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules	Define authorization rules for a financial aid item type. Select specific rules used to hold disbursements of financial aid monies.

## Defining Authorization Rules for a Financial Aid Item

Access the Disbursement Rules: Item Type - Indicators page.

Indicators | Groups/Thresholds | Checklists/Tracking

Item Type: 900000000435 Federal SMART Grant      Aid Year: 2008  
 Academic Career: Undergraduate      Institution: PSUNV

Indicators      Find      First      1 of 1      Last

Eff Date: 01/01/1900      Status: Active      Copy Setup Data

Descr: Federal SMART Grant      Short Desc: Federal SM

<input type="checkbox"/> Review Complete	<input type="checkbox"/> Awd Career Match Term Career	<input type="checkbox"/> Post Disb Red Ctrl - Census Dt
<input type="checkbox"/> Package Complete	<input type="checkbox"/> Honor Disbursement Hold	<input type="checkbox"/> Post Disb Reduction Control
<input type="checkbox"/> Verification Complete	<input type="checkbox"/> Must Meet Satisfactory Prog	<input type="checkbox"/> ASG HERA Level Match
<input type="checkbox"/> Official Fed EFC	<input type="checkbox"/> Hold Disb Fed Overaward	<input type="checkbox"/> ASG CIP Code Match
<input type="checkbox"/> NSLDS Loan Year Match	<input type="checkbox"/> Hold Disb Inst Overaward	<input type="checkbox"/> ASG Minimum GPA
<input type="checkbox"/> Bdgt/Term Level Match	<input type="checkbox"/> Hold If Withdrawn	<input type="checkbox"/> ASG Incomplete Grades
<input type="checkbox"/> Hold If No Enrollment Data	<input type="checkbox"/> Match Fees	<input type="checkbox"/> ASG Pell Grant Awarded
<input type="checkbox"/> Loan Entrance Intervw Req	<input type="checkbox"/> Authorize To Fee Assessment	

SMART Enrollment Verification:

Load Level Rules

<input type="checkbox"/> Bdgt/Term Load Match	Disbursement Proration Rule: <input type="text"/>
<input checked="" type="checkbox"/> Awd/Term Load Match	Use Current Load: <input type="text"/>

Disbursement Rules: Item Type - Indicators page

**SMART Enrollment Verification**

Select the value to verify that the student is enrolled in a course for the student’s SMART grant eligible major. Values are *Course Catalog* or *Subject Table*.

During the disbursement authorization process, the following error message appears if the student fails the rule.

Run      04/25/2008 9:49:33AM      Disb ID: 01      Messages

Date/Time:

Student is not enrolled in an eligible course with the required CIP Code for the HERA grant.

Disb.Rule Value:      Student's Value:

---

Message Number: 91

Description:

You may wish to check with the student's academic advisor to see if any of the enrolled courses now satisfies this requirement.

Disbursement Authorization Error Message

**See Also**

*PeopleSoft Enterprise Financial Aid 8.9 PeopleBook*, “Setting Up Disbursement Rules,” Defining Item Type Disbursement Rules

*PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Processing Class Enrollment Transactions,"* Processing Enrollment Transactions Through the Enrollment Component

*PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Designing Your Academic Structure,"* Defining Subject Areas

## 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
- CS Bundle #15, Regulatory Release 4, 2008-2009, posted June 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 and #15, Transfer Credit Information updates

Bundle #15, CIP codes

## Aid Year Rollover

Bundle #15

## CIP code verification

Bundle #15

## 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

## 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

## Disbursement

Bundle #1 resident state as a restriction

## 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

## FA Term HERA Calculations

Bundle #15

## 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

## HERA Calculations Bundle #15

### 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

### Packaging

- Bundle #14, Mass Packaging Assign Process and FED\_EFC Sort field

### 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

**Transfer Credit processing**

Bundle #14, #15, updates

**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