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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8.9 MP1
Financial Aid
Updates for CS Bundle # 9
Regulatory Release 3 2007-2008

April 2007

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Updates for CS Bundle # 9 - Regulatory Release 3 2007-2008

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Updates for CS Bundle # 9 - Regulatory Release 3 2007-2008

Note. This document is an update to the *PeopleSoft Enterprise Financial Aid 8.9 PeopleBook*. It describes the Product Update ID #656265 that was posted to Customer Connection in April 2007. 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 # 9. Specifically, it discusses:

- Pell Schedules for 2007-2008.
- Annual updates for Pell COD processing.
- CommonRecord CommonLine Schema 1.2.0.
- COD reports for ACG and SMART grants.

Pell Schedules for 2007-2008

On February 21, 2007, the Department of Education released the official 2007-2008 Federal Pell Grant Program Payment and Disbursement Schedules – Regular and Alternate. The official 2007-2008 schedules are released as part of this bundle.

To package a Federal Pell Grant for students in 2008, verify that the following areas of the 2008 setup support the amount of 4,310.00 USD:

- Aggregate aid limit table.
- Item type.
- Financial aid item type.
- Packaging plans that include the Pell item type.

After you complete the setup, the system will use the 2007-2008 Federal Pell Grant Program Payment and Disbursement Schedules to award students up to a maximum of 4,310.00 USD based on eligibility.

Annual Updates for Pell COD Processing

The Pell Outbound process (PELLOUT) has been updated to support 2007–2008 Financial Aid year processing.

CommonRecord CommonLine Schema 1.2.0

The CommonRecord CommonLine (CRC) schema, version 1.2.0, is updated from version 1.06 to support the transmission of Graduate PLUS loans and the Direct Disbursement to Borrower loan attribute. Oracle no longer processes loans using the older schema. Verify that your loan servicers will accept CRC records in the new schema.

Note. The Disb Direct to Borrower check box is on the Loan Origination 2 page. The federal application type of Grad PLUS is assigned on the Loan Origination 3 page.

This section discusses how to:

- Process CRC outbound files in 1.2.0 Schema.
- View Graduate PLUS outbound data.
- View Direct Disbursement to Borrower outbound data.

See Also

- *PeopleSoft Enterprise Financial Aid 8.9 PeopleBook*, “Processing CommonLine Loans”
- PeopleSoft Enterprise 8.9 MP1 Financial Aid, HERA Updates to Loan Processing 2006-2007, Bundle 6, Product Update Issue #613411, August 2006.

Pages Affected by CRC 1.2.0 Schema

Page Name	Object Name	Navigation	Usage
Process CRC Outbound Records	SFA_RUNCTL_CRC_OUT	Financial Aid, File Management, CommonLine Loans, Process CRC Outbound Records, Process CRC Outbound Records	Select and process authorized loans to the CRC staging tables. Create XML outbound files for transmission to the loan servicers.
CRC Award	SFA_CRC_AWARD	Financial Aid, File Management, Commonline Loans, View CRC Staging Table Records, CRC Award	Review award type, award amount, and promissory note, guarantor, and lender status information.
CRC Disbursement	SFA_CRC_DISB	Financial Aid, File Management, Commonline Loans, View CRC Staging Table Records, CRC Disbursement	Review disbursement information.

Processing CRC Outbound Files in 1.2.0 Schema

Access the Process CRC Outbound Records page.

Process CRC Outbound Records

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

Selection Criteria Find | View All | First 1 of 1 Last

*Academic Institution: PSUNV PeopleSoft University	*Aid Year: 2006 2005-2006	*School Code: 001315 PeopleSoft
Schema Version: 1.2.0	<input checked="" type="checkbox"/> Orig Outbound	<input type="checkbox"/> Orig Change Outbound

[Process CRC Outbound Records page](#)

For the Schema Version, 1.2.0 is the only selection.

Viewing Graduate PLUS Outbound Data

Access the CRC Award page.

CRC Document		CRC School Information		CRC Student		CRC Award		CRC Person	
Document ID	2007-03-05T16:20:31.36	Destination ID	889002	Student Id	FA0836	Attended School ID	00131500		
Awards						Find View All First 1 of 1 Last			
Award Type	FFELPGraduatePLUS	Award Amount	5000.00	Award Year	2006	Approved Amount			
Award Seq Nbr	1	Current Amount		Loan Key	1 Loan Information	Gross Loan Amount			
Award Nbr		Guarantee Date		Nbr Sched Disb		Blanket Guarantee Date			
Default/Overpay		Award Update Date		Status Information					
Pnote Status DtTm		PNote Status Code		Guarantor Status DtTm		Guarantor Status Code			
Credit Status DtTm		Credit Status Code		Lender Status DtTm		Lender Status Code			
Miscellaneous Information									
Exit Date		School Note Message	2006	Alternative Prog Cd		Guarantor Note Message			
Alternative App Ver		Lender Note Message		Guarantee Adj Indicator		Reallocation Award ID			
Interest Rate Option		Award Confm Cd		Actual Interest Rate		Response Type Code			
Guarantee Reduce Cd		Reinstatement Amount		Service Type Code		Repay Opt Cd			
Response Code		Revised Notice Of Guarantee		Unique Data		Response Information			

[CRC Award page](#)

In the Awards group box, the Award Type field has a value of **FFELPGraduatePLUS**.

Viewing Direct Disbursement to Borrower Outbound Data

Access the CRC Disbursement page.

[CRC School Information](#)
[CRC Student](#)
[CRC Award](#)
[CRC Person](#)
[CRC Disbursement](#)

Document ID 2007-03-05T16:20:31.36 **Destination ID** 889002
Student Id FA0836 **Attended School ID** 00131500

Award Information [Find](#) | [View All](#) First 1 of 1 Last

Award Type FFELPGraduatePLUS **Award Year** 2006
Award Sequence Number 1

Disbursement Information [Find](#) | [View All](#) First 1 of 2 Last

Disbursement Number 1 **Direct Disb To Borrower** true
Disbursement Amount **Disbursement Net Amount**
Disbursement Date 2005-08-16 **Disbursement Fee Amount**
Disbursement Release false **Disbursement Fee Paid**
Disbursement Type Code **Guarantee Fee Amount**
Disbursement Status Code **Guarantee Fee Paid**
Funds Distribution Method Code **Outstanding Cancellation Amt**
Disbursement Day Override Ind **Cancellation Amount**
Disbursement Consummation Ind **Netted Cancellation Amount**
Cancellation Date **Funds Release Date**
Disbursement Returned Amount **Check Number**
Post Withdrawal Return Date **Late Disbursement Indicator**
Post Withdrawal Ret Correction **Response Code**

[Response Information](#)

[CRC Disbursement page](#)

In the Disbursement Information group box, the Direct Disb To Borrower field has a value of **true**. This option is valid for all CommonLine loan types as long as the lender participates.

COD Reports for ACG and SMART Grants

This bundle delivers new pages and reports for ACG and SMART grants. This section gives an overview and discusses how to:

- Select an ACG/SMART data request.
- Generate ACG or SMART data request files.
- Load and process multiple reporting, reconciliation, Statement of Accounts, and year-to-date files.
- Process multiple reporting records.

Pages Used to Produce ACG and SMART COD Reports

Page Name	Object Name	Navigation	Usage
ACG/SMART Data Request	SFA_ASG_DATA_REQS T	Financial Aid, File Management, ACG/SMART Grants, Generate Data Request	Select the types of data request files that you want to create for submission to COD.

FA EC File Inbound	RUNCTL_FA_INBOUND	Financial Aid, File Management, Import Federal Data Files	Load Federal data files into staging tables
ACG/SMART Data Request Outbound	SFA_RUNCTL_ASG_DR	Financial Aid, File Management, ACG/SMART Grants, Outbound Data Request	Create and store the report data request information files at the location you specify. These files are then sent to COD.
ACG/SMART Multiple Reporting	SFA_RUNCTL_ASG_MR	Financial Aid, File Management, ACG/SMART Grants, Import Multiple Reporting Data	Update MRR status of originated grant records from the loaded MRR files from COD.
Origination	SFA_ASG_ORIG	Financial Aid, ACG/SMART Grants, Use, Manage ACG/SMART Grants	View updated MRR status information on originated grant records.
ACG/SMART Header, ACG/SMART Data Request, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_DREQ_EC, SFA_ASG_TRAILER_EC	Financial Aid, File Management, ACG/SMART Grants, View Data Request Records	View data request file information for ACG and SMART grants.
ACG/SMART Header, ACG/SMART Multiple Report, ACG/SMART Institution Info, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_MRR_EC, SFA_ASG_MRR_EC_INS, SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Multiple Reporting, Review MRR	View loaded MRR file data.
ACG/SMART Header, ACG/SMART Reconciliation, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_REC_EC, SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Cash Management Reports, Review Reconciliation	View loaded reconciliation file data.
ACG/SMART Header, ACG/SMART ESOA Summary, ACG/SMART ESOA Detail, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_SAR_EC, SFA_ASG_SARD_EC, SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Cash Management Reports, Review Statement of Account	View loaded Statement of Account file data.

ACG/SMART Header, ACG/SMART Originations, ACG/SMART Disbursements, ACG/SMART Summary, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_YTDORG_EC SFA_ASG_YTDDSB_EC SFA_ASG_YTDSUM_EC SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Year to Date Reports, Review YTD Records	View loaded Year To Date file data.
YTD Origination All Recipients	SFA_ASG_871_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Originations	Generate a list of students who are in an origination year-to-date file sent by COD.
YTD Origination Errors	SFA_ASG_872_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Origination Errors	Review conflicting information from COD and your application tables.
YTD Disb All Recipients	SFA_ASG_873_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Disbursements	Generate a list of students who have been disbursed as of the year to date.
YTD Disbursement Errors	SFA_ASG_874_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Disbursement Errors	Review conflicting information from COD and your application tables.
ACG/SMART MRR Batch Report	SFA_ASG_875_RPT	Financial Aid, ACG/SMART Grants, Multiple Reporting, MRR By Batch	Review and monitor POP (potential overaward payment) and Blocked Institution situation by specific batches.
ACG/SMART MRR by Status Code	SFA_ASG_875B_RPT	Financial Aid, ACG/SMART Grants, Multiple Reporting, MRR By Status	Review and monitor POP and Blocked Institution situation by specific Status codes. Use after the MRR inbound file is imported and the ACG/SMART Multiple Reporting process has been run.
ACG/SMART MRR Report	SFA_ASG_875A_RPT	Financial Aid, ACG/SMART Grants, Multiple Reporting, MRR Report	Review and monitor POP and Blocked Institution situation. Use after the MRR inbound file is imported and the ACG/SMART Multiple Reporting process has been run.

ACG/SMART ESOA	SFA_ASG_870_RPT	Financial Aid, ACG/SMART Grants, Cash Management Reports, ACG/SMART ESOA	Review and monitor ACG and SMART grant fund allocations.
ACG/SMART Reconciliation Report	SFA_ASG_923_RPT	Financial Aid, ACG/SMART Grants, Cash Management Reports, Reconciliation Report	Review records reconciled with COD.
ACG/SMART Origination Status	SFA_ASG_876_RPT	Financial Aid, ACG/SMART Grants, ACG/SMART Origination Status	<p>Review and monitor students in selected Origination Status and COD Transmit Status values.</p> <p>Origination Status values include <i>Accepted, Corrected, Originated, Rejected, Transmitted, Change to Origination, and Cancelled.</i></p> <p>COD Transmit Status values include <i>Cancel, On Hold, Ready, Review, and Transmitted.</i></p>

Understanding ACG/SMART Data Requests

Use the data request record to request acknowledgment batch replacement, multiple reporting, Statement of Account, year-to-date information, and reconciliation. You can also use the data request record to receive reporting information for multiple students for whom you originate awards and who might also have awards originated at other institutions.

After you select the type of data request and run the process, the data request files are sent to COD. COD will respond by sending the requested information using the appropriate message class.

Selecting an ACG/SMART Data Request

Access the ACG/SMART Data Request.

ACG/SMART Data Request

Reset

Institution: PSUNV PeopleSoft University

Reporting School Code: 001315 UNIVERSITY OF CALIFORNIA (UCLA)

Aid Year: 2008

Attended Pell ID: 001315 UNIVERSITY OF CALIFORNIA (UCLA)

ACG/SMART Data Request Type		Find View 1		First	1-2 of 2	Last
Seq:	1	Request Type:	ACG Multiple Reporting	+ -		
Request Code 1:	Disbursed Records	Request Code 2:	Selected Institution			
		Institution				
Seq:	2	Request Type:	ACG Multiple Reporting	+ -		
Request Code 1:	Originated Records	Request Code 2:	Selected Students			
		Student				

ACG/SMART Data Request

To select multiple ACG and SMART Grants requests, use the Add (+) button to add more rows.

Request Type

Select the type of information report. Values are:

ACG Multiple Reporting: Selecting this activates the Multiple Report Request Code 1 list and the Multiple Report Requests Code 2.

ACG Reconciliation Request: Select to receive reconciliation information.

ACG Statement of Accounts: Select to receive your funding levels and transactions with GAPS.

ACG Year-To-Date: Select to receive a summary of how many originations and disbursements COD sent out and how many rejects and message codes you received based on year-to-date.

SMART Multiple Reporting: See ACG Multiple Reporting.

SMART Reconciliation Request: See ACG Reconciliation Request.

SMART Statement of Accounts: See ACG Statement of Accounts.

SMART Year-To-Date: See ACG Year-To-Date.

Multiple Report Request Code 1

For multiple reporting only. Select **Disbursed Records** or **Originated Records**. For example, to determine if a student or all students are conflicting with other schools, base the request on disbursements to see if another school has disbursed to a student.

Multiple Report Request Code 2

Select **All Students**, **Selected Institution**, or **Selected Students**. Restrict the number of students reported by COD by selecting the appropriate option.

YTD Request ID

Available when **ACG Year-To-Date** or **SMART Year-To-Date** is selected in the **Request Type** field. Click to list students for whom you want year-to-date data.

Institution

Available when **Selected Institution** is selected in the **Multiple Report Request Code 2** field. Click to request multiple reporting from other institutions. You can select the institution for which you are requesting data.

Student

Available when **Selected Students** is selected in the **Multiple Report Request Code 2** field. Click to request multiple reporting by student.

Generating ACG or SMART Data Request Files

Access the ACG/SMART Data Request Outbound page.

ACG/SMART Data Request Outbound

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

Selection Criteria Find First 1 of 1 Last

*Academic Institution	<input type="text" value="PSUNV"/>	+	-
*Aid Year	<input type="text" value="2008"/>		
*Reporting School Code	<input type="text" value="001315"/>		
*File Type	<input type="text" value="SMART Data Request"/>		
*Outbound File Path	<input type="text" value="\\MENC-DEVSHARE01\TESTDATA"/>		

[ACG/SMART Data Request Outbound page](#)

Use this page to run the ASGRQ process that creates and stores the requested information at the location you enter.

Loading and Processing Multiple Reporting, Reconciliation, Statement of Accounts, and Year-To-Date Files

COD will send report files based on the data request files submitted by the school. Use the FA Inbound process to load these files into the COD report inbound staging tables. The FA Inbound process determines the type of file based on the content of the Batch ID field in the header.

Use the provided inquiry pages to view the file data. Use the search record for these pages to search by EC Transaction ID, where the values match the file message classes. The field value is derived from the Batch ID by the FA Inbound process and is not intended to match the name of the physical file.

Processing Multiple Reporting Records (MRR)

Access the ACG/SMART Multiple Reporting page.

ACG/SMART Multiple Reporting

Run Control ID: audits

[Report Manager](#) [Process Monitor](#)

Run

Report Request Parameters
<input checked="" type="checkbox"/> ACG/SMultiple Reporting Record

[ACG/SMART Multiple Reporting page](#)

Use this page to run the FAPASIMR process to update MRR status information for any originated grant records.

ACG/SMART Multiple Reporting Record

Select this option to process ACG and SMART MRR files.

Viewing Updated Origination Records

Access the Origination page.

Origination		Disbursement	
Test1_Student		ID:	FAASG001
Aid Year:	2007 Financial Aid Year 2006 - 2007	Institution:	PSUNV
Item Type:	900000000400 Federal ACG Grant	Career:	UGRD
Award ID:	758910001A07001315001	Reporting School Code:	001315
Grant Type:	ACG	Origination Status:	Originated 02/13/2007 9:15:08AM
<input type="checkbox"/> Update Origination	Orig Status	COD Transmit Status:	Ready 02/13/2007 9:15:08AM
		MRR Status:	Orig Inst 02/13/2007 10:13:39AM

Seq	Trans Nbr	Award Amt	Student Lvl	Enrollment Dt	Elig Reason Cd	HS Program Cd	Program CIP Cd	Citizen Ovrld
1	1	\$750.00	1st yea	08/30/2006	AP/IB			

[Origination page](#)

MRR Status is a new field. When multiple reporting records are loaded into the system, the status of the data updates MRR Status.

MRR Status

Indicates that more than one institution might have reported the grant. Use this information to identify and resolve potential overaward payments and concurrent enrollments before they occur. Values are:

Con Enrl (Concurrent Enrollment): The student is concurrently enrolled.

Disb Inst (Disbursed Institution): Data request for Disbursement information.

None: No MRR information found.

Orig Inst (Originated Institution): Data request for Origination information.