# Office of Financial Aid

# Fort Valley State University

# Policies & Procedures Manual

# Foreword

The Office of Financial Aid Policies and Procedures Manual is designed to assist the staff in performing their duties and responsibilities actually and efficiently. The manual will be revised as needed and used as a tool for training employees.

This manual is not all inclusive in that Federal, State, and Institutional rules and regulations are constantly changing. The Office of Financial Aid will use the Federal Student Aid Handbook, HOPE Manual, Atomic Manual, Banner Financial Aid User Guide, and etcetera as resources when administering financial aid programs.

Members of the staff may be assigned the responsibility of updating the manual when appropriate. Staff include the following positions:

- Director of Financial Aid or Designee
- Assistant Director of Financial Aid
- Financial Aid Advisor
- Financial Aid Customer Service Assistant

# Mission Statement

The Office of Financial Aid seeks to provide financial aid services which are sensitive to individual student needs and effective in enabling students to bridge the gap between family resources and educational expenses. The delivery of services will be characterized by timeliness, accuracy, clarity and customer friendliness, and will be accomplished through the simplest procedures consistent with fiscal responsibility and governmental and University regulations. The Office of Financial Aid is committed to providing student borrowers with loan counseling and information about loan indebtedness and repayment responsibilities. In responding to the diverse and changing needs and growth of the University community, a spirit of cooperation and an approach which is flexible, equitable, innovative and broad-ranging will be maintained.

# Code of Conduct

In compliance with the Higher Education Opportunity Act of 2008 Section 487 (a) (25) (A)-(C), the Office of Financial Aid staff at Fort Valley State University (FVSU) and agents of the Institution will maintain a strictly professional relationship with lenders, guarantors, loan servicers, or the like when performing services relating to the administration of the Federal Family Education Loan Program, Federal Direct or Private Loans.

The Office of Financial Aid staff and agents of the Institution are prohibited in engaging in any of the following activities:

- revenue-sharing arrangements with any lender
- the solicitation or acceptance of any gift from a lender, guaranty agency or loan servicer
- contractual agreements relating to education loans
- assigning or recommending to a borrower a particular lender or guaranty agency
- requesting or accepting the offer of funds for private loans from any lender
- accepting staffing assistance from any lender
- endorsement of lenders
- acceptance of advisory board compensation

The Office of Financial Aid will not hinder a borrower in any way from selecting his/her lender of choice or incur any unnecessary delays in loan certification. The highest ethical standards will be maintained in following the mission of the Institution and the Office of Financial Aid.

# Organizational Chart

| *Financial Aid Staff* | *Years of Financial Aid Service* |
|---|---|
| Cynthia Parks<br>Director | 18 years |
| Teresa Joseph<br>Assistant Director | 14 years |
| Athena Smith<br>Financial Aid Advisor | 6 years |
| Khaleelah Muhammad<br>Financial Aid Advisor | 1 year |
| Financial Aid Advisor | Vacant |
| Staff Associate/Systems Manager | Vacant |
| Celestine Gavins<br>Financial Aid Customer Service Assistant | 6 years |
| Audrea Page<br>Financial Aid Customer Service Assistant | 3 years |

# Office of Financial Aid
## Fort Valley State University
## 1005 State University Drive
## Fort Valley, Georgia  31030
## 478-825-6363 (phone)        478-825-6976 (fax)
## Email:  financialaid@fvsu.edu
## Website:  www.fvsu.edu/financialaid

Regular Business Hours*:

| Monday | 8:00 a.m. – 5:00 p.m. |
|---|---|
| Tuesday | 8:00 a.m. – 5:00 p.m. |
| Wednesday | 8:00 a.m. – 5:00 p.m. |
| Thursday | 8:00 a.m. – 5:00 p.m. |
| Friday | 8:00 a.m. – 5:00 p.m. |

*Normal operating hours may change during special events such as registration.

Holiday Hours:

The Office of Financial observes the campus holiday schedule.

Financial Aid  PC Lab Hours*:

| Monday | 8:00 a.m. – 5:00 p.m. |
|---|---|
| Tuesday | 8:00 a.m. – 5:00 p.m. |
| Wednesday | 8:00 a.m. – 5:00 p.m. |
| Thursday | 8:00 a.m. – 5:00 p.m. |
| Friday | 8:00 a.m. – 5:00 p.m. |

Financial Aid Application Priority Deadlines:

| Fall Semester | March 1st |
|---|---|
| Spring Semester | October 1st |
| Summer Semester | March 1st |

# The Application Process

The Office of Financial Aid recommends the following financial aid application resources:

- Free Application for Federal Student Aid (FAFSA) On the Web Worksheet
- Web-based FAFSA, [www.fafsa.ed.gov](www.fafsa.ed.gov)
- FAFSA On the Phone
- FSA ID Brochure

The FAFSA is the official financial aid application for students and parents who wish to apply for financial aid assistance at Fort Valley State University.  The FAFSA is available by January 1st of each year.

All students and parents are encourage to complete the FAFSA on-line and to use the Data Retrieval Tool (DRT).  Using the DRT will reduce the probability of an applicant being selected for the verification process.

Financial Aid applicants selected for verification must submit any requested documents to the Office of Financial Aid before their application can be processed. If corrections are needed, the Office of Financial Aid will transmit the corrections to the Central Processor as applicable.  Examples of required documents may include the following:

- IRS Tax Return Transcript
- Verification Worksheet
- Military Leave & Earnings Statement (military)
- W2
- Non-Tax Filer Statement

Students and parents may use the PC Lab located on the 1st Floor of the Troup Administration Building located next to Room 119.

The FAFSA can be found at https://fafsa.ed.gov/.

**Federal Student Aid**
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of the AMERICAN MIND®

**FAFSA®**
**Free Application for Federal Student Aid**

| Home | About Us | FSA ID | StudentAid.gov | Help | | SEARCH |
|------|----------|--------|----------------|------|--|--------|

## FAFSA Filing Options

You may choose any of these three methods to file a Free Application for Federal Student Aid (FAFSA):

- Login to apply online (Recommended) or
- Complete a PDF FAFSA (Note: PDF FAFSAs must be mailed for processing) or
- Request a paper FAFSA by calling us at 1-800-4-FED-AID (1-800-433-3243) or 319-337-5665. If you are hearing impaired, contact the TTY line at 1-800-730-8913.

**Complete a PDF FAFSA**

Select the school year for which you are applying for financial aid. For example, if you plan to attend college between July 1, 2016 and June 30, 2017, click **The 2016-2017 School Year (July 1, 2016 – June 30, 2017)**. If you plan to attend college between July 1, 2015 and June 30, 2016, click the other link. If you are applying for a summer session, check with your college to verify which application you should complete.

The PDF FAFSA is available for you to print and fill out manually or is screen-fillable. Screen-fillable means you can enter your data on the screen before printing. If you choose this option you will not be able to save your data to your PC.

The 2016 - 2017 School Year (July 1, 2016 - June 30, 2017)

The 2015 - 2016 School Year (July 1, 2015 - June 30, 2016)

**NEED HELP?**

Site Last Updated: Sunday, January 24, 2016

Download Adobe Reader

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WhiteHouse.gov | USA.gov | ED.gov

## General Tracking Policy

All application documents submitted by a student will be tracked in Banner. Documents must be posted to Banner screen RRAAREQ prior to dissemination to advisors. Documents are not to be given to any staff member prior to posting to Banner.

## General Tracking Procedures

1. Access the tracking screen in Banner (RRAAREQ).
2. Select the correct Aid Year.
3. Enter the student's FVSU ID Number. If the student record exists, it will be displayed.
4. If the student's record does not exist, the message "*ERROR* ID DOES NOT EXIST, Press LIST for Name/ID Search" will appear at the bottom of the screen.

## Documents Processing Policy

Many of the documents submitted to the Office of Financial Aid contain sensitive information of the students and parents we serve. Extra care has to be taken to safeguard the privacy of this information and to maintain the trust families have placed with us by submitting many of their confidential documents. All information submitted to the Office of Financial Aid will be treated with the utmost care and confidentiality will be maintained by every member of the staff. In order to safeguard the confidentiality of student and parent data, documents will be placed in a file and stored in file cabinets. Documents are to remain in file cabinets until needed by staff for processing, review, or advisement.

The Customer Service staff is primarily responsible for records management within the office. All documents received should have the student's name and FVSU ID Number affixed to the top right section of each page. The student's name and FVSU ID Number helps with document tracking and retrieval. Document retrieval is a core function of the Office of Financial Aid. It is important that staff take care in the tracking and filing documents. Documents are less apt to be misplaced when filed promptly. To prevent misplacement of documents, all documents will be filed

within 24-48 hours of receipt.  As students and parents contact the office for assistance, staff must be able to retrieve the student's file with ease.

## Document Processing Procedures

1. All documents received by mail, fax, or at the front desk, are **date stamped** and **reviewed** for accuracy, completeness, and the appropriate signatures by the Customer Service staff.

   **a.  Incomplete and/or Inaccurate Documents:**

   i. Walk-ins:  Return the document(s) to the student and/or parent explain what actions need to be taken to complete the document.  Have the student and/or parent complete the document (when possible) within the office.

   ii. Documents received by mail or fax:  Review the document for completeness, accuracy, and all appropriate signatures.  Make a copy of the document for the file.  Post the document as "Received Incomplete" in Banner on RRAAREQ. Return the original copy of the document, via mail, to the student and/or parent for appropriate action.  Highlight the affected area(s) of the document, affix a copy of the "Documentation/Action Required Form" to the document indicating the required action(s), and mail to the student and/or parent. Documents should be returned by mail the same day as received when possible.

   iii. Create a file folder for the documents.

   iv. File the folder in the appropriate file cabinet.

   **b.  Complete Documents:**

   i. Create a file folder (New Students Only) for the document(s).  A file folder should already exist for returning students.  File folders should be created within the same day of receipt of the document to prevent loss or misplacement.

   ii. File the student's folder in the appropriate file cabinet.

2. All files will be maintained in the file room until pulled for review or audit requests. Files should not be kept in the advisor's office unless the file is in verification review. Each advisor will maintain two file drawers with their area labeled as 1) Verification Incomplete and 2) Corrections Required.

3. Verification Incomplete Drawer: files that require additional documentation is requested during verification review. Incomplete files will remain in this drawer until the requested document(s) is received. Once the document(s) is received the verification process is completed. If verification is accurate, the file is passed to the customer service staff for filing in the file room. If corrections are required, the file is placed in the "Corrections Required" drawer until the corrected Institutional Student Information Record (ISIR) data is received from the Central Processing System (CPS).

4. Corrections Required Drawer: files that require corrections following the verification review. Files will remain in this drawer until the corrected ISIR data is received from CPS. These files will need to be pulled and reviewed to ensure that the resulting Expected Family Contribution (EFC) is official and matches the recalculated EFC recorded on the Verification Compliance Checklist and the Transaction Number has been incremented by one. If the Transaction Number is incremented by any number other than one, resolution is needed (the student may have made a correction to his ISIR data). The Verification Compliance Checklist will need to be completed indicating that verification is now completed. The file should be locked to ensure that no more transactions are received with advisors' knowledge.

5. New Student files: New student files will be maintained in two file cabinets. Once cabinet will be labeled "New Students Complete" and the other "New Students Incomplete." The cabinets are so labeled in order to determine the number of new students who have been packaged and who remain to be packaged. New student files will be merged into the current student file cabinets at the beginning of the term once enrollment for the term has been verified. Files of students who fail to enroll will be maintained until the end of the academic year should they decide to enroll in a subsequent term. At the

end of the academic year, all files of student who fail to enroll will be shredded and discarded.

6.  Graduates:  Students graduating at the end of the term will have their files purged and relocated to the office storage location.  Secure a list of graduates from the Office of the Registrar.  Pull the files and store in bankers boxes.  Files should be stored in alphabetical order and each box should be labeled with the beginning alphabet and ending alphabet located in each box.  The box should also be labeled with the term date of completion (i.e. graduates Fall 2015. Graduates Spring 2016, estimated Purge Date, etc...).  Files are maintained for 5 years before being purged unless they need to be held longer because of audit requirements, aid liabilities, and etcetera.

# Awarding & Disbursement

The primary purpose of the federal student financial aid programs at Fort Valley State University is to provide monetary assistance to eligible admitted students who will benefit from post-secondary education but could not do so without assistance. Each student is assisted based on eligibility determined by completing the Free Application for Federal Student Aid (FAFSA). **The priority deadline for submitting the FAFSA application every year is March .1ˢᵗ.**

Federal student aid programs are administered in conjunction with nationally established practices and philosophies of Title IV funds for education. The basis of this philosophy is the belief that "the family is the primary source to help students pay for their education." Consistent with an equitable approach to awarding student financial aid, a systematic method of determining a family's financial strength and a student's need is employed.

Fort Valley State University participates in all Federal Title IV Programs and administers several scholarships and loans. They include:

Federal Pell Grant
Federal Supplemental Educational Opportunity Grant (SEOG)
Federal College Work-Study
Federal Perkins Loans
Federal Subsidized and Unsubsidized Stafford Loans
Institutional Work Aid
James H. Porter Scholarship
FVSU Presidential Scholarship
Georgia Hope Scholarship
Federal PLUS Loan

Funding for most of the federal aid programs is limited. Students with complete files, who meet the priority deadline, are considered first in the award of these limited funds. For additional information on these and other scholarships, visit the Financial Aid Scholarship information page at the university's website at www.fvsu.edu.

Awards are based on enrollment status. Students enrolled less than half time (less than 6 credit hours for undergraduate level students and 5 for graduate level students) are not eligible to participate in the student loan programs. Awards are made based on full-time enrollment. Awards will be adjusted if students are not enrolled full

time. Third Party payments may be applied to student accounts by the Student Financial Services.

Students should meet and maintain all program eligibility requirements, have established financial need, and be enrolled in a program that will award a degree. Financial Aid recipients must maintain Satisfactory Academic Progress (SAP).

# Cost of Attendance (COA)

The Cost of Attendance for a student is an estimate of that student's educational expenses for a period of enrollment during the financial aid award year as allowed by the Higher Education Act, Sec. 472. The COA is determined based on residency status (in-state or out-state), housing status (on-campus, off-campus, or with parent(s)), program of study, and enrollment status. The standard period of enrollment is fall and spring semesters. All students are assumed to be enrolled full-time and therefore will include in their COA estimated costs for tuition and fees, books and supplies, room and board, transportation, and miscellaneous expenses when applicable. The COA is used for establishing a student's financial need for the purpose of awarding aid. Students are awarded on the basis of a COA comprised of allowable costs that are assessed to all students in the same academic workload. The COA may be adjusted to include additional allowable costs, such as lab fees, uniforms, purchase of a computer, dependent care expenses, study abroad programs approved for credit, and etcetera. Documentation of exceptional expenses (interview of student, signed written statement, or other appropriate source(s)) must be included in the student's record when applicable.

The COA may be recalculated when a student's enrollment status has been determined to be less than full-time. A recalculation may result in a reduction is financial aid awards. The COA for students' less-than-half-time enrollment includes estimated tuition and fees, books and supplies, a limited room and board allowance, transportation, and dependent care expenses. Miscellaneous and personal expenses will not be included in a less-than-half-time COA.

Professional judgment may be used to adjust the COA on a case-by-case basis to allow for special circumstances. This is at the discretion of the Financial Aid Administrator.

# Standard Academic Year (SAY)

For purposes of Title IV Aid, an academic year is defined as two semesters, fall and spring, with 30 weeks. Enrollment in a minimum of 12 semester credit hours each semester is considered full-time for undergraduate students and 9 semester hours for graduate students.

# Satisfactory Academic Progress (SAP)

Satisfactory Academic Progress (SAP) requirements are contained in three sections of the regulations:  Section 668.16(e), 668.32, and 668.34.  Section 668.16(e) specifies that in order to be considered administratively capable, a school must establish publish, and apply reasonable standards for measuring whether a student is maintaining SAP.  Reasonable standards are the same as or stricter than the schools' standards for students enrolled in the same program who are not Title IV recipients, and contain both qualitative (grade-based) and quantitative (pace) standards.  In order to comply with the federal regulations governing SAP, Fort Valley State University has established, published, and will apply the following standards to ensure students are satisfactorily progressing toward degree completion.  Fort Valley State University (FVSU) semester is considered a trailer term with Fall and Spring being the primary academic year.

Satisfactory Academic Progress must be maintained to remain eligible to receive Title IV aid.  Title IV aid includes Federal Pell Grants (PELL), Federal Supplemental Educational Opportunity Grants (FSEOG), TEACH Grants, Federal Work Study (FWS), Federal Direct Loans and Federal Perkins Loans.  SAP is determined by measuring the student's cumulative grade point average (GPA) and the student's rate of progression (PACE) toward degree completion.

# Scholarships

## Fort Valley State University (FVSU) Foundation Scholarship Policy

Scholarship assistance for entering freshmen is made possible through the FVSU Foundation. The purpose of the FVSU Foundation Scholarship Awards Policy is to provide consistent guidelines to the University Community for the awarding of University-wide scholarships. Through the effective use of these guidelines, the numbers of students receiving awards will be maximized.

Scholarships are provided as an incentive to attract academically talented students to the University. Various criteria are considered, such as SAT or ACT scores and high school Grade Point Average. The FVSU Office of Admissions notifies eligible students of their selection and the amount of their scholarship. Students must complete a scholarship application by the required deadline in order to be considered.

Scholarships funds awarded through University-wide Scholarship Programs will be limited to the costs of tuition, institutional fees (excluding orientation fees), room and board, and in selected cases, books. Students who reside on campus and are awarded a scholarship to include room and board will receive funding to cover the actual on-campus room and board costs unless the letter of award indicates differently. Student who reside off-campus and whose scholarship award includes room and board will be awarded an equivalent to an average on-campus student housing rate.

Acceptance of an individual scholarship award is an agreement to the Terms and Conditions of that award as well as all policies governing FVSU scholarships. Every student's financial aid award package (scholarships, gift and need-based assistance) is subject to audit with the final determination of scholarships and other forms of assistance to be made by the FVSU Office of Financial Aid in compliance with federal rules and regulations and University policy.

FVSU reserves the right to adjust individual scholarship awards after letters have been "Accepted" to ensure effective use of federal, state, and University dollars. Full-time enrollment is required for all FVSU scholarship recipients.

## Limit of University Scholarship/Award Funding to Individual Students

A student's University scholarship funds (gift, scholarships and guarantee awards) may not exceed in-state direct costs (tuition, fees, room and board). If the student also receives non-University funds (including all forms of federal, state, and external assistance), the total of all funds cannot exceed the total direct and indirect costs of education. Indirect costs include allowances for personal expenses and transportation. All University financial commitments may be adjusted to ensure that total gift and need-based assistance does not exceed the total COA as defined for federal student aid purposes. A student may not receive a refund of any University scholarship fund.

The Financial Assistance Programs listed below will cause a reduction or cancellation in the amount of the University-wide Scholarship Award(s).

- Federal PELL Grant
- Federal Supplemental Educational Opportunity Grant (SEOG)
- HOPE Scholarship
- ZELL Scholarship
- Other Federal, State, or Institutional Scholarships

Financial aid awards through the student loan assistance program are not impacted by this policy as they are governed by federal regulations.

## Outside Scholarships

An outside scholarship is any scholarship not awarded by the University, such as a scholarship provided by a private sector company, philanthropist, or foundation. Outside scholarships are considered resources, meaning that they may reduce the financial aid package. A student is prohibited from receiving funds designated to pay for the same COA component (i.e. two different tuition and fee scholarships). When this occurs, the University award will be reduced accordingly. If the outside scholarship is non-specific, the University's Office of Financial Aid will first apply the outside scholarship to unmet need, and then reduce self-help (loans and work-study) before touching institutional scholarships. This permits the student to replace loans, which must be repaid, with the outside scholarship.

## General Scholarship Processing Procedures

1. All scholarship checks will be forwarded to the Office of Financial Aid. The Business Office will forward all scholarship checks and supporting documentation to the Office of Financial Aid designee.

2. The Office of Financial Aid designee will log each scholarship check received on the Scholarship Transmittal Form. A copy of the Scholarship Transmittal Form and check will be forwarded to the respective Financial Aid Advisor for packaging and coordination with other financial aid received. The student's copy should be maintained in the student's file. A copy of the Scholarship Transmittal Form will be delivered to Student Accounts, along with the actual check. Someone in the Cashier's Office will sign and date the office copy of the transmittal form to verify delivery of the check. The Office of Financial Aid designee should maintain a copy of the signed form in the administrative and student files.

## Disbursement of Scholarships

Donors may specify the semester(s) in which the scholarship is paid.

1. If a student wants the scholarship distributed in a way that differs from what the donor requests, the student will be asked to get an authorization letter from the donor.
2. If the donor letter does not specify a distribution schedule, FVSU will disburse scholarships of less than $1000.00 all in the semester received. Scholarships if $1000.00 or larger will be disbursed in equal increments across the enrollment period (i.e. $500.00 fall semester and $500.00 spring semester).
3. If the scholarship has been split and the donor has not given instructions, the student may request the entire award be moved to a specific semester. However, the student is then cautioned that he or she may be short of funds for a subsequent term.

# HOPE and Zell Miller Scholarship Procedures

Before a student can be awarded the HOPE or Zell Miller Scholarship, and application has to be made. The financial aid application for this can either be the FAFSA, which is the application for federal aid or a GSFAPPS application, which is the state application for most scholarships and grants. Students can do both, but it is not necessary. Students who have not attended in 2 or more terms must submit the HOPE Scholarship Evaluation form in addition to their application for HOPE. ***Per GSFC regulations, applications must be received by the last day of the term for which the student is interested in being paid.***

- Please be aware of the current HOPE regulations before you begin awarding. The regulations can be found at [www.gsfc.org](www.gsfc.org)
- Cross check SURFER, SHATERM, and ZHAHOPE for hours for tier 2, 3, and 4.

## HOPE or ZELL MILLER SCHOLARSHIP—Degree seeking students—Requirements

- ❖ Before you begin awarding a student, you have to make sure the student has done either a GSFAPPS or FAFSA.
- ❖ Log into BANNER
- ❖ Go to RRAAREQ, Type in student ID, Control Page Down.
  --Look for an ISIR(FAFSA code) or a GSFAPP.
  -- If the student completed an ISIR only and he/she was selected for verification, the verification has to be completed and verified before the student can be awarded HOPE or ZELL MILLER.
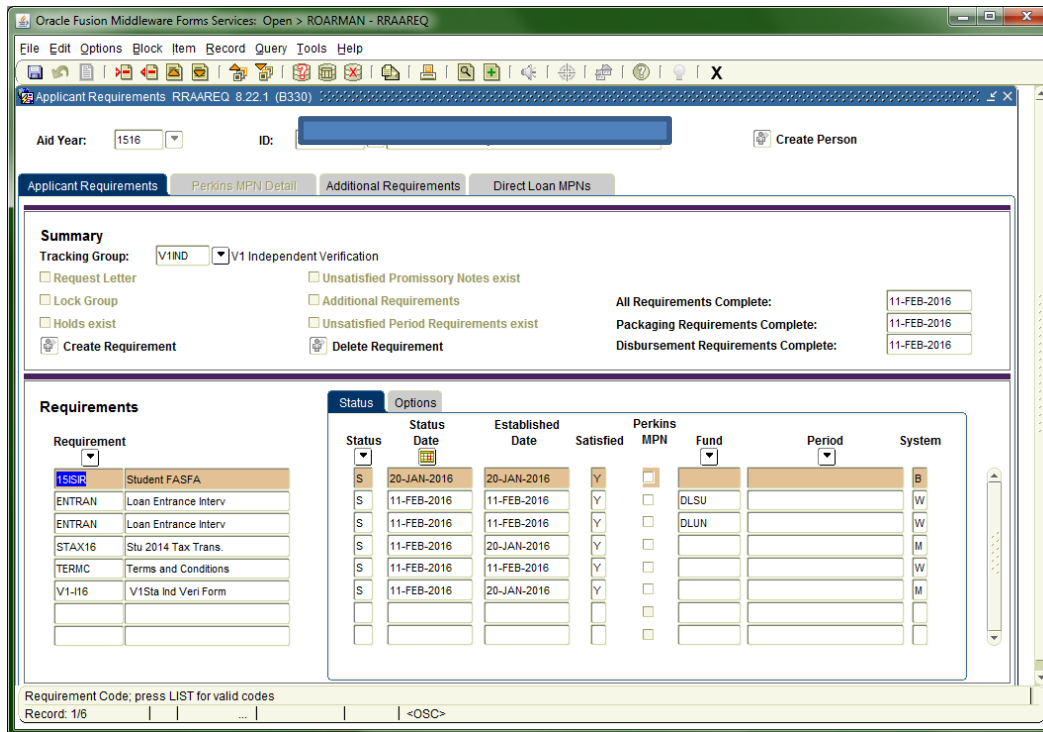
Once you have established the student's completion of either a FAFSA or GSFAPP, you can begin looking to see if the student is eligible to be awarded.

❖ In Banner, go to SGASTDN. Control Page Down.

This is the screen where you check the student's admission status, their residency status and the student's major.

Student Status—Active

Residence—Resident (this means Georgia Resident) For Tier 2 and above 24 month rule

Degree—Associate or Bachelor

Citizenship—US Citizen or Eligible Non-Citizen

Look on SGASTDN, if a student is not a citizen then they should not auto package.

Once the student has been checked for an appropriate admission status, a matriculated status into a degree program and listed as a Georgia Resident, you can continue on with checking for other eligibility. *__If the student does not meet any one of the aforementioned criteria, then that student is not eligible to receive the HOPE Scholarship.__*

❖ Next, you need to make sure the student is making Satisfactory Academic Progress.

On Banner, go to ROASTAT, Click on the Eligibility Tab. Control Page Down.

Make sure the code of S or D (Suspended or Denied) is NOT the current SAP Status. All other codes let you know the student can be awarded financial aid.

***If the student is not making satisfactory academic progress, the student is not eligible to receive financial aid.*** If the student is making SAP, proceed with checking eligibility.

❖ A Student has to meet the following requirements to receive HOPE or ZELL MILLER:
❖
--- Must meet the selective service registration requirements

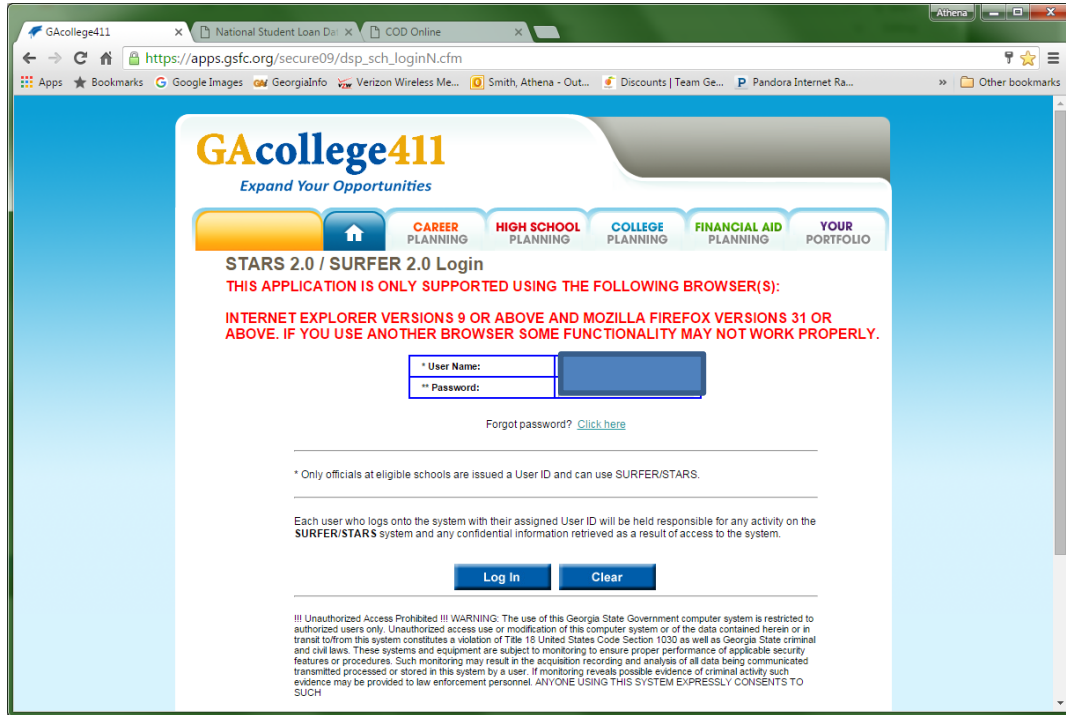--- he/she must not be in default of a student loan or owe a refund to the federal or state government

--- The student must also be in accordance with the Georgia Drug Free Act

--- The student cannot be incarcerated and receive the HOPE funds

*** The FAFSA and the GSFAPP checks this information against national databases, so it is not necessary to perform extensive research for them. The applications will not process if this criteria is not met.

❖ You can check to see if the student was eligible for HOPE or ZELL MILLER out of high school by going to SURFER.

1. Log into SURFER



2. Click on Student Demographics. Enter in the student's social security number, click submit.

3. Scroll down to the bottom of the page. This portion of the form lets you know the student's high school, high school graduation date, and HOPE or ZELL MILLER eligibility, if any. If the student was eligible out of high school, it will have a GPA beside the Final GPA field.

   --- The Track field portion of the form lets you know the type of diploma the student received in high school.

   --- If the Track says "C", this means the student was college prep. College Prep students have to have graduated with a 3.0 or better.

   --- To check for ZELL MILLER eligibility then look on the Demographics screen under the HOPE Final GPA fields on the left hand side and look for the ZELL MILLER status box, only award ZELL MILLER if that status is a Y **(anything other than Y student is not eligible).**

4. Next step is to see if the student has attended any other institutions. There are several ways to checking this information. The student should have provided FVSU with the transcripts from other institutions they have attended, but this is not always the case!

--- First, go to the SURFER database, Log In.

--- Click on Student Scholarships and Grants Status

SURFER 2.0

**Student Scholarship and Grant Status**

Back | Logout

| Student Demographics | Student Scholarship and Grant Status | GSFApps | Add/Edit Student Invoice | Hope/Zell Loss Dates |

Student: 

Final HOPE Scholar. Graduation Date

No e-HOPE application found

No GSFAPPS on File

Zell Miller eligible: N          Scholarship Eligibility Expiration Date: 06/30/2099

**Award History**

| Term | Awarded | Disbursed | Refund Due | Forgiven Hr | Date Added | Date Changed | Hours | Term Type | Dual-enrollment hours excluded from CAP |
|---|---|---|---|---|---|---|---|---|---|
| CENTRAL GEORGIA TECHNICAL COLLEGE | | | | | | | | | |
| 2009 HOPE DIPLOMA | | | | | | | | | |
| Spring | $342.00 | $342.00 | $0.00 | | 04/17/2009 | 04/20/2009 | 6.00 | Quarter | 0 |
| MIDDLE GEORGIA STATE UNIVERSITY | | | | | | | | | |
| 2000 HOPE SCHOLARSHIP TIER 1 PUB | | | | | | | | | |
| Fall | $960.00 | $0.00 | $0.00 | | 09/23/1999 | 09/23/1999 | 12.00 | Semester | |
| 1998 HOPE SCHOLARSHIP TIER 1 PUB | | | | | | | | | |
| Fall | $577.00 | $0.00 | $0.00 | | 10/22/1997 | 10/22/1997 | 14.00 | Quarter | |
| Winter | $577.00 | $0.00 | $0.00 | | 01/23/1998 | 01/23/1998 | 17.00 | Quarter | |
| Spring | $387.00 | $0.00 | $0.00 | | 04/16/1998 | 04/16/1998 | 6.00 | Quarter | |
| MIDDLE GEORGIA TECHNICAL COLLEGE | | | | | | | | | |
| 2011 HOPE DIPLOMA | | | | | | | | | |
| Fall | $301.00 | $301.00 | $0.00 | | 09/29/2010 | 10/26/2010 | 5.00 | Quarter | 0 |
| 2010 HOPE DIPLOMA | | | | | | | | | |
| Fall | $746.00 | $746.00 | $0.00 | | 09/23/2009 | 09/25/2009 | 15.00 | Quarter | 0 |
| 2009 HOPE DIPLOMA | | | | | | | | | |
| Spring | $256.00 | $256.00 | $0.00 | | 03/24/2009 | 03/25/2009 | 5.00 | Quarter | 0 |
| 1999 HOPE DIPLOMA | | | | | | | | | |
| Fall | $400.50 | $0.00 | $0.00 | | 11/04/1998 | 11/04/1998 | 0 | Quarter | |

--- Enter the student's social security number. Click Submit.

--- This will show you where the student has received State aid.

--- Then, go to NSLDS and login.

--- Enter in the Students Social Security number, date of birth, and first name.
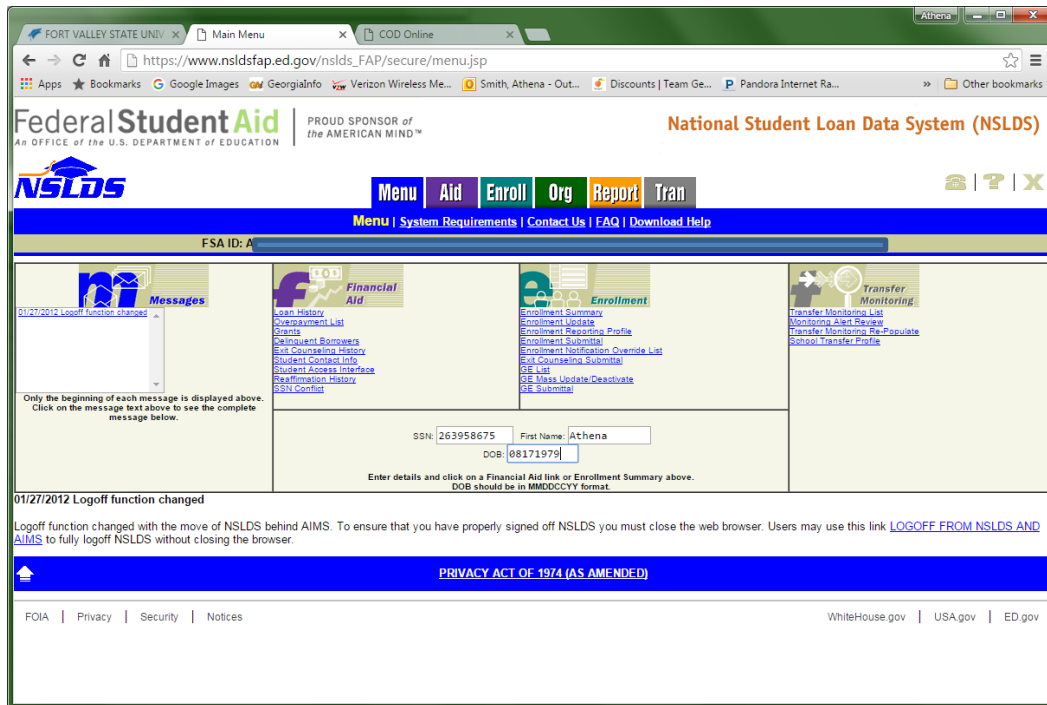
--- Click on Loan History. This will break down loan information by aid year and school.
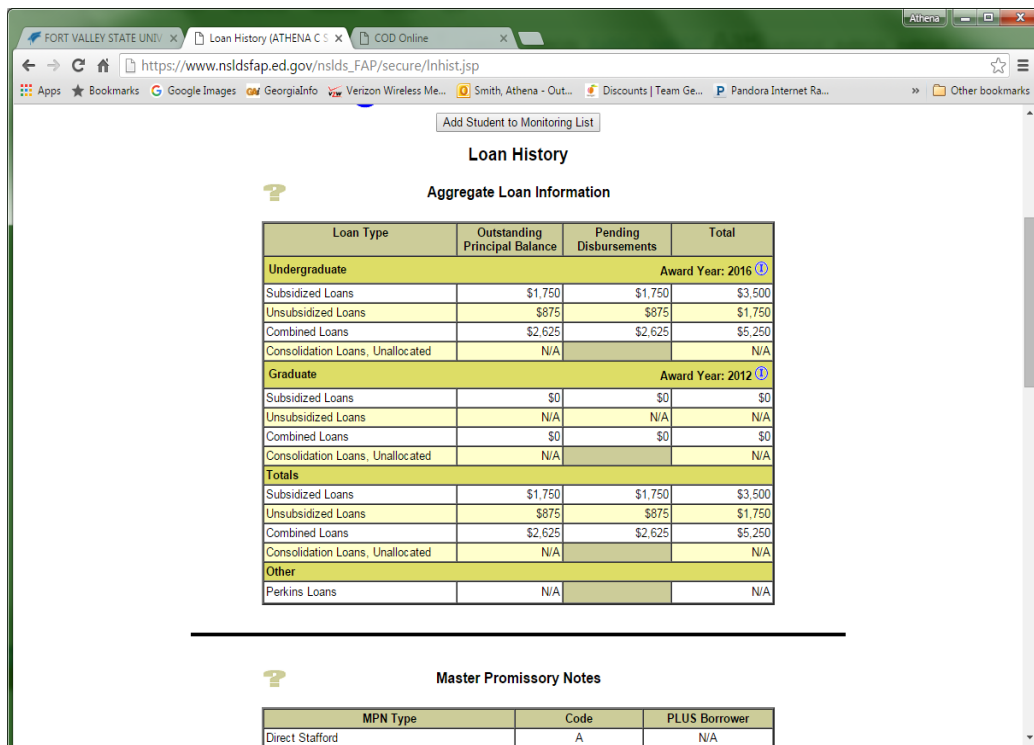


--- Click on Grants. This screen shows the federal grants the student received by aid year and college.

**NSLDS**

Menu | Aid | Enroll | Org | Report | Tran

Loan History | Overpayment List | **Grants** | Delinquent Borrowers | Exit Counseling History | Student Contact Info | Student Access Interface | Reaffirmation History | SSN Conflict

SSN: ____ First Name: ____ DOB: ____ (MMDDCCYY) Retrieve

FSA ID: ____

**Grants**

**Subsidized Usage Limit Applies**

Student is not on your school's Transfer Monitoring List.

Add Student to Monitoring List

### Pell Grant History

Lifetime Eligibility Used: 375.011%

| # | Award Year | Scheduled Amount | Award Amount | Disbursed Amount | % Sched. Award Used by Award Yr | Latest Disb | Posted by COD |
|---|---|---|---|---|---|---|---|
| 1 | 2007 - 2008 | $4,310 | $4,310 | $3,233 | 75.0116 | 01/11/2008 | 01/15/2008 |
| | | GEORGIA COLLEGE & STATE UNIVERSITY 00160200 | | | EFC: 0 | Ver. Flag: N/A | Tran: 01 |
| 2 | 2006 - 2007 | $4,050 | $4,050 | $4,050 | 100.0000 | 05/08/2007 | 06/21/2007 |
| | | GEORGIA COLLEGE & STATE UNIVERSITY 00160200 | | | EFC: 0 | Ver. Flag: V | Tran: 04 |
| 3 | 2001 - 2002 | $3,750 | $3,750 | $3,750 | 100.0000 | 04/05/2002 | 05/08/2002 |
| | | MIDDLE GEORGIA STATE UNIVERSITY 00158100 | | | EFC: 0 | Ver. Flag: A | Tran: 02 |
| 4 | 2000 - 2001 | $3,300 | $3,300 | $3,300 | 100.0000 | 01/09/2001 | N/A |
| | | MIDDLE GEORGIA STATE UNIVERSITY 00158100 | | | EFC: 0 | Ver. Flag: N | Tran: 01 |

PRIVACY ACT OF 1974 (AS AMENDED)

FOIA | Privacy | Security | Notices — WhiteHouse.gov | USA.gov | ED.gov

--- Click on Enrollment, This shows you the enrollment period for the institutions.

**Federal Student Aid**
An OFFICE of the U.S. DEPARTMENT of EDUCATION

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**National Student Loan Data System (NSLDS)**

**NSLDS**

Menu | Aid | Enroll | Org | Report | Tran

**Enrollment Summary** | Enrollment Update | Enrollment Reporting Profile | Enrollment Submittal | Enrollment Notification Override List | Exit Counseling Submittal | GE List | GE Mass Update/Deactivate | GE Submittal

SSN: ____ First Name: ____ DOB: ____ (MMDDCCYY) Retrieve

FSA ID: ATHENA.SMITH.FSA logged on as ____

### Enrollment Summary

Enrollment Detail | Program Enrollment Detail | Enrollment Timeline | Subsidized Usage | Enrollment Maintenance | Enrollment Push to Roster

| | School Name | OPEID | Most Recent Status | Eff. Date | ACD | Cert. Date | Cert. Method |
|---|---|---|---|---|---|---|---|
| 1 | GEORGIA MILITARY COLLEGE | 00157100 | Three Quarter Time | 01/09/2016 | 03/01/2018 | 01/21/2016 | School Batch |
| 2 | MIDDLE GEORGIA STATE UNIVERSITY | 00158100 | Graduated | 05/04/2006 | 05/04/2006 | 10/17/2006 | School Batch |
| 3 | VALDOSTA STATE UNIVERSITY | 00159900 | Withdrawn | 03/01/2012 | N/A | 08/24/2012 | School Batch |
| 4 | GEORGIA COLLEGE & STATE UNIVERSITY | 00160200 | Graduated | 05/06/2008 | 05/06/2008 | 05/21/2008 | School Batch |
| 5 | MIDDLE GEORGIA TECHNICAL COLLEGE | 02508600 | Withdrawn | 12/16/2009 | N/A | 07/06/2010 | School Batch |

PRIVACY ACT OF 1974 (AS AMENDED)

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--- Review the NSLDS and SURFER information to determine which schools (other than FVSU) we need transcripts for. Once the list has been made, continue with checking for transcripts.

5. Check and see if FVSU has received transcripts from all schools that NSLDS and Banner show they received financial aid from.
--- Go to BANNER
--- Go to SOAPCOL. Control Page Down. This shows you the status of the transcripts. The transcripts received date should be logged in. If the registrar's office has reviewed the transcripts, there will be a review date.



--- If you notice that we (FVSU) are missing a transcript on the student's file, please place the Transcript Tracking Code on RRAAREQ, put a note on RHACOMM and place a hold on the student's account on SOAHOLD until the transcript is received. Once the transcripts are received and the transcript is articulated, the student can then be evaluated for the HOPE Scholarship.

Once all transcripts are received, go to BANNER and begin to award the student.

6. Go to ZHAHOPE. Enter in the student's ID Number

Tab . In the Level field, you will have to type in "US"

US—students who have been at FVSU since the Quarter to Semester change was made—Most Common.

UG—Students who were enrolled at FVSU prior to the Semester system.

Control Page Down.

# End of Semester HOPE Process

## The HOPE Accumulation Eligibility Process (ZORHTGA)

**(This Process Shows Students Who Have Lost or Gained HOPE at Particular Checkpoints)**

◊ The ZORHTGA process is completed once at the end of every semester. The Registrar's Office will let you know when the grades have been put on the BANNER System.

- ❖ Login into BANNER
- ❖ Go to GJAPCTL
- ❖ In the PROCESS field type in ZORHTGA
  - \* There are parameters that are saved on this form. Tab over after typing in the process and click on the drop-down menu
- ❖ Control Page Down
- ❖ Input the Printer name (DATABASE)
- ❖ Control Page Down

- ❖ PARAMETERS:

  01-  US
  02-  B
  03-  Y
  04-  N
  05-  N
  06-  BLANK
  07-  ENTER IN TERM (I.E. 201602)
  08-  BLANK
  09-  BLANK
  10-  BLANK

# FINAL HIGH SCHOOL GPA UPLOAD PROCEDURES

❖ This process has two parts. The first process has no parameters. It provides a "snapshot" of students who are listed in our BANNER system and holds information for the next process. The second process has multiple parameters; it matches the students who are in the SURFER file with those in our system. It then inputs their final HOPE eligibility into BANNER. The final GPA process allows you to see a student's eligibility based on their high school information once their final grades have been submitted. This allows the financial aid office to update to update student awarding if necessary.

➢ Go to the SURFER database and login



➢ Go to SURFER inbox

- ➢ Click the download bubble beside the FL_FINAL-GPA-20XX file. (This is the main file).
- ➢ Click Submit.
- ➢ Save the Final GPA list to your desktop. Once you have loaded the main file once, the next time you run this process you will only use the update file FL_FINAL_GPA_UPDATES_20XX.TXT.ZIP
  ( This is the update file)
- ➢ This file will need to be unzipped, which requires a password from GSFC (4mac01*)
- ➢ Rename the file as "flhope.dat"
- ➢ Now log into FileZilla
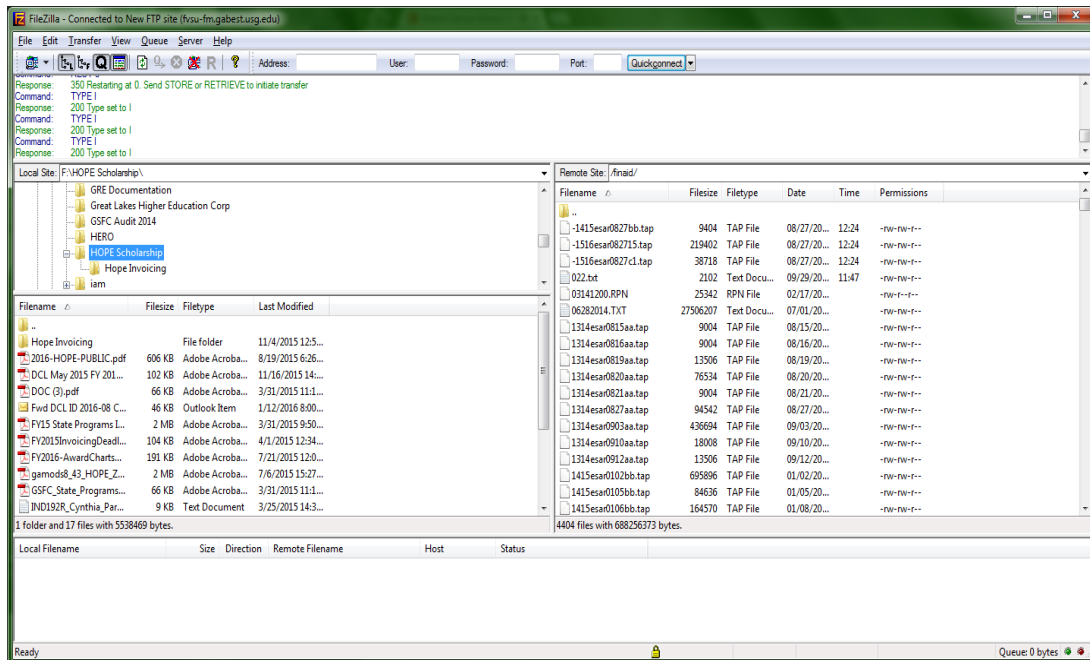
- ➢ From the drop down menu on the right side marked Remote Site select /finaid/
- ➢ Select the flhope.dat file on the left side under Desktop files and move it to the right side
- ➢ Go to BANNER
- ➢ Go to GJAPCTL
- ➢ In the process area type in ZORINFR. Control Page Down.
- ➢ In Printer Control, type in DATABASE. You do not want to print this process out. Control Page Down.
- ➢ You will not put anything in the parameters for this process. Control Page Down.
- ➢ Your Cursor has to be in the Submission Block for the process to run.
- ➢ Click SAVE. This process takes a while to complete.
- ➢ Click Options and select Review Output. Click on either the .pdf file or .lis file
- ➢ Once the ZORINFER process is complete, you can run the High School GPA process.
- ➢ Go to Banner
- ➢ Go to GJAPCTL

Type in ZORHHSL on the process are. The final parameters are saved; just click the drop down menu beside Parameter Set. You may have to edit the file name or the terms.
Control +Page Down
Enter in Printer Name (DATABASE)
Control + Page Down

➢ Parameters:

01-    FLHOPE.dat—make sure this file name matches the files name that was put into FileZilla.
02-    Xxxxxx(ex:201602)—This is the term that the records are processed.
03-    US
04-    Xxxx(ex:1516)—Academic Year
05-    HOPEDG—After you enter this, click on Records →Insert; This will put a blank line in for an additional parameter.
       ZELL—After you enter this click on Records→Insert; This will put a blank line in for an additional parameter.
06-    ELIG—this is the fund status code used to let us know the student is eligible.
07-    BLANK
08-    PR30—this is the preliminary reason code for college prep students (3.0GPA)
09-    PR32—This is the preliminary reason code for tech prep students(3.2GPA)
10-    HS30—This is the final reason code for college prep students (3.0 GPA)
11-    HS32—this is the final reason code for tech prep students (3.2GPA)
12-    I—this is for ID/Name only matches
13-    I—this is for inactive preliminary records
14-    NEHS—this is the ineligible status code for records
15-    NZHS—this is the ineligible status code for records
16-    U—this is the update mode. Control Page Down.

➢ Make sure you are in the submission block. Click SAVE.
➢ Be sure to click OPTIONS and then select Review Output.

➢ When the process is complete, you can click down in the Process: File Name: blocks and select either the .pdf or .lis file
➢ Go student by student on the list and compare to BANNER to see what Types of information is needed, if any, before they can be awarded.
➢ Go to SGASTDN to make sure the student is accepted
➢ Go to RRAAREQ to see if we have a financial aid application.
➢ If student can be awarded, award them.

# Study Abroad

Students studying abroad may use their FVSU scholarships to pay for costs only when a student is registered at FVSU in an FVSU program. In cases where students study abroad through other institutions and are not registered at FVSU, no FVSU scholarship funding will be available.

Eligible students may use their Title IV aid to pay for approved Study Abroad sites.

# Consortium Agreements

FVSU participates in Consortium Agreements between institutions at the discretion of the Director of Financial Aid or Designee. Decisions to participate are made on a case by case basis in circumstances such as a graduating senior, required course only offered once a year, transient status approved by the Registrar's Office, and etcetera.



**FORT VALLEY STATE UNIVERSITY**
A State and Land-Grant Institution • University System of Georgia

## FINANCIAL AID CONSORTIUM AGREEMENT

This agreement is entered between **Fort Valley State University** (HOME Institution) and **Middle Georgia State University** (HOST Institution) for the purpose of allowing:

**Section I: To be completed by the Student (Please print):**

Name: _____ → FVSU ID: _____ Last 4 of SSN: _____

Permanent Address: _____ → City: _____ State: _____ Zip Code: _____

Telephone Number: _____ → FVSU Email: _____

Consortium Agreement Requested for the following semester(s): Check all that apply.
[··]Fall 20_____ → [··]Spring 20_____ → [··]Summer 20_____

I understand that:

- I must receive approval from Fort Valley State University to be in Transient at the HOST Institution.
- I must be enrolled in a degree or certificate program.
- I must submit this form to the HOST Institution for completion of Section II.
- I may have to pay the HOST Institution out-of-pocket until my aid at FVSU becomes available.
- I am responsible for all charges that may be incurred at the HOST Institution.
- I must notify the FVSU Financial Aid Office if my enrollment changes while attending the HOST Institution (i.e. withdrawals, drop courses, etcetera).
- I must maintain Satisfactory Academic Progress.
- I must submit an official academic transcript at the end of the Consortium Agreement.

By signing this agreement, I understand that Title IV, State, and Institutional rules and regulations will be followed by both the HOME and HOST Institutions.

_____ → → _____
Student's Signature → → → → → → → Date

# Loan Adjustments

Financial aid funds are awarded to students at varying times during the award year. Each time an award is received, the student's financial aid award package must be reviewed to protect against an over award. If the award creates an over award (need exceeded or Coast of Attendance (COA) exceeded), the student's financial aid package has to be reduced to prevent the over award. The Office of Financial Aid will always adjust loan funds in the following order:

1.  Unsubsidized Loans
2.  Subsidized Loans
3.  Perkins Loans
4.  Parent Loan for Undergraduate Students (PLUS)

The following defines instances when loan adjustments may need to be made to a student's award package:

- To prevent or correct an over award
- To add a scholarship and/or grant
- To calculate Title IV Returns
- To cancel a loan at the request of the borrower

The steps for adjusting the loan will depend on the status of the loan "prior to disbursement" or "after disbursement."

## Procedures for Adjusting Loans Prior to Disbursement

1.  Access the student's award package on RPAAWRD.

2.  Calculate the amount of the adjustment and determine whether the adjustment must be applied first to the Subsidized or the unsubsidized loan. In some cases, the adjustment must be made to the subsidized loan first. This occurs when the total of the awards (excluding the loans) exceed the unmet need. You must adjust the subsidized loan first in this instance to keep the subsidized amount of the loan within the unmet need. Remember, a student is entitled to his/her full loan amount. The

remaining amount of the subsidized loan would then be added to the unsubsidized loan amount.

3. Manually post the adjusted loan amount on the "Awards Maintenance Tab" in the "Offered" column and the "Accepted" column of the "Amounts Tab."

4. Save the award change.

5. Review the "Unmet Need" block to ensure your adjustment eliminated the over award.

6. Access RHACOMM and not the change you made and why you mad the change.

## Procedures for Adjusting Loans Prior to Disbursement

1. Access the student's award package on RPAAWRD.

2. Calculate the amount of the adjustment and determine whether the adjustment must be applied first to the Subsidized Loan or the Unsubsidized Loan. In some cases, the adjustment must be made to the subsidized loan first. This occurs when the total of the awards (excluding the loans) exceed the unmet need. You must adjust the Subsidized Loan first in this instance to keep the subsidized amount of the loan within the unmet need. Remember, a student is entitled to his/her full loan amount. The remaining amount of the subsidized loan would then be added to the unsubsidized loan amount.

3. Manually post the adjusted loan amounts on the "Funds Award by Term Tab" in the "Offered" and "Accepted" columns for the Fall Term and the Spring Term. Since the loan has been disbursed, you may have an unevenly disbursed loan. Be sure to post the proper amounts in the corresponding terms correctly in that it will impact the adjustment you must make on RPALORG. Depending on the amount of the adjustment, you may have to reduce the award for all terms.

4. Save the award changes.

5. Review the "Unmet Need" block to ensure your adjustment eliminated the over award.

6. Access the electronic loan information on RPALORG.

7. Select the appropriate loan (that needs adjusting): Arrow down until the correct Loan ID (1st field) is highlighted. Be sure the Loan Type is correct (ex. DLSU, DLUN, PLUS).

8. Ctrl Page Down twice. You should be on the "Disbursement Information" page. By default, the first loan will be highlighted.

9. Be sure the correct loan term is highlighted. The loan term is the 3rd filed from the top. Arrow down (when necessary) until you are on the appropriate loan term.

10. Insert a new record (while the original loan is still highlighted) by clicking "Record" from the top (toolbar) menu. Select "Insert." This will insert a new (blank) record with the same term as the original record.

11. Tab to the "Comment" field (bottom left). Make a brief comment explaining the reason for the adjustment.

12. Tab over to the "Gross Amount" field. Enter the amount of the adjustment (as a negative). Example: If the loan adjustment is reducing the loan by $250.00, you will enter -250.00 in the "Gross Amount" field.

13. Click the save icon below the toolbar (or hit F10 to save).

14. Ctrl Page Up twice until you are back on the "Loan Summary" page (the first page of the selected loan). The total loan amount on RLADLOR should equal the total loan amount on RPAAWRD.

15. Tab to the "Approved Amount" field is highlighted and change the amount to the new award amount. The "Requested Amount" field should automatically populate/update once the adjustment has been made (Steps 6-10).

16. Click the save icon or hit F10. Exit the Direct Loan Origination screen (RLADLOR).

17. Access the RPAAWRD screen and ROAIMMP the term(s) affected by the adjustment.

18. Make a comment of the adjustment on "Applicant Comments" screen (RHACOMM).

19. The "award" adjustment will be electronically uploaded to Common Origination and Disbursement (COD).

# Processing Calendar

| Activity | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|---|
| **Electronic Processing** | | | | | |
| Download All Electronic Files | X | | X | | X |
| *ISIR Records<br>* Correction Records<br>*Loan Records<br>*Loan Entrance Records<br>*Master Promissory Note Records<br>*PELL Records | | | | | |
| | | | | | |
| **ISIR  Processing** | | | | | |
| Download All Electronic Files | X | | X | | X |
| *Load ISIR Records<br>* Batch Post Tracking Groups<br>*Batch Post Budget Groups<br>*Batch Post Packaging Groups<br>*Generate Verification List | | | | | |
| | | | | | |
| **Award Packaging** | | | | | |
| Batch Package Awards | X | | X | | X |
| | | | | | |
| **Corrections  Processing** | | | | | |
| Generate Corrections File | | X | | X | |
| Transmit Corrections to CPC | | X | | X | |
| Load Correction Files | X | | X | | X |
| | | | | | |
| **Direct Loan Processing** | | | | | |
| Generate Loan Files | | X | | X | |
| *Initiate Loan Records<br>* Loan Adjustment Records | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| Transmit Loan Files to COD | | X | | X | |
| Load Loan Records | X | | X | | X |
| Load Loan Entrance Records | X | | X | | X |
| Load MPN Records | X | | X | | X |
| | | | | | |
| **Reconciliation** | | Monthly | | | |
| *Direct Loan Reconciliation<br>*Pell Reconciliation<br>*HOPE/ZELL<br>Reconciliation<br>*MOWR Reconciliation<br>*SAL Reconciliation<br>*TEACH Reconciliation<br>*FWSP Reconciliation<br>*Other | | | | | |
| **Transfer Monitoring** | Every | Term | | | |

# DATALOAD PROCEDURES

1.  Log onto **EdConnect**

    Description:  EdConnect is a Windows-based software that assists users with sending, receiving, and managing their Federal Student Aid information electronically.  Users collect data on their personal computer or computer system and transmit the collected data in batches over the Student Aid Internet Gateway (SAIG).  The appropriate Title IV application system receives the data, processes the data, performs any required database cross-referencing, and returns the processed data to the users SAIG mailbox.  The entire processing cycle for routing application data within the SAIG system is typically 72 hours.After you have logged on the **EdConnect**, use your login information to access the mailbox.

2.  Once you have successfully logged in, you will see the **"Transmission Queue"** box.
3.  To see the files that are already in the mailbox, simply click the button that says **"Mailbox."**
4.  To retrieve files that have been sent by the **Department of Education (DOE), Central Processing System (CPS)**, or others press the **"Transmission"** button.
5.  Once you have done the **'blank'** transmission wait for the **"Transmission Successful"** message.
6.  Now you can access the most recent files sent to the SAIG mailbox.  To see these files click **"Mailbox Query."**
7.  Once you are in the **"Mailbox",** select all ISIR files (idsaXXop,igsaXXop, igsgXXop, isrfXXop, etc.)  **Please refer to the Reference Guide for all ISIR files that can be loaded with this process.**
8.  After you have selected all the ISIR files, press **the "Transmission"** button.
9.   Wait for the **Transmission Successful"** message then close EdConnect.
10. Open **"Command Prompt"**, Go to **Start; All Programs; Accessories; Command Prompt**
11. Follow the instructions in the following Print Screen:
    **I:\>C: {Enter}**
    **C:\>cd c:/iam/data {Enter}**
    **I:\>C:  {Enter}**
    **C:\>cd c:/iam/data {Enter}**

**C:\IAM\DATA>,move  i???10\* f:/datatest {Enter}**
**I:\>C:  {Enter}**
**C:\>cd c:/iam/data {Enter}**
**C:\IAM\DATA>,move  i???10\* f:/datatest {Enter}**
**C:\IAM\DATA> cd f:/datatest {Enter}**
**C:\IAM\DATA>  f: {Enter}**
**F:\DATATEST>filecat –- i\*i-o 0910esar.tap {Enter}**
**Wait for "filecat:** terminated **normally" message.  Close "Command Prompt."**

12. Open **SecureFTP**:

13. Once you have logged on to **SecureFTP,** on the **"Your Computer"** side navigate to **My Computer>finaid$ on "cats" (F:/)>Datatest.**

14. After you have opened the **DATATEST** folder on the server side, open the **finaid"** folder.

15. Once the **"finaid"** folder is opened, locate the **"0910esar.tap"** file in the **DATATEST** folder on **"Your Computer."**  Double-click the **0910esar.tap file** to **UPLOAD** to the server.  When this message appears, **"The file 0910esar.tap already exists."**  Select the **REPLACE** option and hit **OK.**

16. After you have successfully downloaded the new files to the server, login to **Banner.**  Make sure the **"Date Modified"** on the server side is the same date that you are downloading the file**.**

17. Once you are in Banner, run the RCBTPxx process (EDE Dataload Pt 1).  NOTE: Make sure to verify parameters are correct as seen below:

18. After you have successfully ran the process, review the output by going to **Options; Review; Output**.  The output number will have the process name with a 7-digit process number at the end (ex. rcbtpxx_1234567).  **Always review the .log and .lis files** to make sure that the records loaded with no errors.  The number of records read from the input data should match the number of applicants loaded to the tables.

19. After you have successfully ran and reviewed the output for the RCBPxx process, run the **RCPMTCH** process.  The RCPMTCH process is used to match students who may already have data in the system and matched to an already existing student ID number After you have successfully ran the process, review the output by going to **Options; Review; Output**.  Once you are on the output screen, review the "**rpcmtch_XXXXXXX.lis "** file to see a summary of how many students were matched and how many students were processed t the **SUSPENSE** file.

# Banner Financial Aid Procedures

The Office of Financial Aid has detailed Banner procedures for the day to day processing of financial aid applications.  The original Excel spreadsheet instructions can be found on the departmental shared drive in **F:/Banner/1516 FA Job Processes Ver 1 3 June 9 2015 dated 7/14/2015**.  The processes include the following:

- Dataload (Processing of FAFSAs)
- Tracking-Batch Posting
- Verification
- ISIR Corrections
- Budgeting/Packaging/Awarding/-New Students
- Budgeting/Packaging/Awarding/All Students
- Transfer Monitoring
- COD/PELL/TEACH/Direct Loan Processing

The documentation should be updated as needed according to processing changes, new aid year updates, and etcetera.

# Federal Work-Study Program

The Federal Work-Study (FWS) Program is federally funded program in which eligible students may be employed by the University in On Campus positions. Eligible students may also be employed in Off Campus positions by federal, state, local public agencies, and certain private nonprofit or for-profit organizations. Off Campus positions offered by the University are typically located on community service sites.

The FWS program provides students the opportunity to earn part of their educational expenses and to gain valuable work experience for future reference. To the extent possible, the University will provide positions that will compliment and reinforce each students' educational program or career goals.

The Office of Financial Aid complies with Federal Work-Study Program guidelines found in the Federal Student Aid Handbook when administering the program at the University.

## Student Eligibility:

- Students must be an eligible financial aid recipient as determined by the Free Application for Federal Student Aid (FAFSA)
- Students must demonstrate financial need as determined by the Free Application for Federal Student Aid (FAFSA)
- Students must be enrolled at least half-time at the University
- Student must be in good standing for Satisfactory Academic Progress (SAP)
- Student must have a Social Security Number

## Student Awarding:

- Students must be eligible financial aid recipients and select interest in the Federal Work-Study on the FAFSA or submit a written request to the Office of Financial Aid
- Students are awarded based on their financial need and Cost of Attendance
- Students are awarded federal work-study in the Banner Financial Aid System. The Banner Code used is FWSP.

- Students must accept awards that are in an "offered" status by using their Banner Web account.
- Students are awarded an initial amount that is determined each award year based on the University's federal allocation.

## Student Award Notification:

The student's award indicates the amount of Federal Work-Study awarded for a specific academic period. The standard academic period is fall and spring semesters. Students can review and accept their award in the Banner Web Student system.

## Student FWS Placement:

- Students must present an unexpired picture ID and Social Security Card
- Students must complete an Employment Packet
- Students must complete an employment contract.
- Students cannot be employed by the FWS program and an FVSU department as a regular employee at the same time.
- The Payroll Director will notify the Federal Work-Study Coordinator when a student is identified as having submitted a FWS Contract and Personnel Action Notice (PAN) to Human Resources.
- The Supervisor must submit a Job Description to the Federal Work-Study Coordinator.
- The Supervisor must sign the student's employment contract.
- The Supervisor must train the student for the position employed.
- The Supervisor must ensure the student is working in a safe environment.
- Completed employment documents are submitted to the University's Human Resources (HR) department.
- HR processes the employment paperwork for Payroll
- HR provides instructions to the student to setup an ADP account

## Work-Study Payroll:

- Supervisors must approve their employee's time in ADP according to the payroll schedule.
- Supervisors must monitor their employee's earnings to avoid maximum hours being exceeded.
- The Office of Financial Aid Federal Work-Study Supervisor and the Payroll Director receives signed timesheets from Off Campus supervisors via email and approves the employee's time in ADP.
- The Payroll Director enters the employee's timesheet in ADP only in the absence of the Office of Financial Aid Federal Work-Study Supervisor.
- Federal Work-Study employees are paid on a bi-weekly schedule.
- Students are limited to twenty (20) hours per week and earn $7.25 per hour. Exceptions may be made to the hours earned per week on a case by case basis.
- Students cannot work during class time unless the scheduled class has been canceled.
- The Payroll Director provides a flat file, N##_epop###.txt, on a monthly basis to the Federal Work-Study Coordinator. The file contains the student employees' earned wages total for each scheduled pay period. The file is loaded into the Banner Financial Aid system.
- Banner Financial Aid is used to monitor student awards, earnings, job descriptions, authorizations, and reconciliation of funds.

## Off Campus Federal Work-Study Positions:

- Off Campus Supervisors are sent a Federal Work-Study Off Campus Agreement that must be renew every year.
- Original signatures are required on the Agreement.
- Off Campus employment are usually Community Service positions (i.e. Boys & Girls Club of Fort Valley)

## Community Service Requirements:

- The University calculates the 7% Community Service requirement each year when the new Federal Work-Study allocations are received for Campus Based Programs.
- The Federal Work-Study Coordinator monitors the number of students and awards giving to students placed in Community Service and Reading Tutor programs to be certain that the University meets the expenditure requirements for community service.

## Dress Code:

Students are expected to check with their Supervisor regarding the position's dress code standards. Students must be aware of the expectations for the position and conduct themselves accordingly regarding appropriate attire and appearance in their place of employment.

## Transfer of Position:

The Federal Work-Study Coordinator works in cooperation with the student and supervisor to ensure that all parties are satisfied with the position assignment. Students that are not satisfied with their position assignment should contact the Office of Financial Aid to request a transfer. All transfers must be approved by the Federal Work-Study Coordinator in conjunction with the supervisor. Students must notify their supervisor of their intent to change positions. Frequent transfers are not allowed and will hinder the student's ability to earn the FWS awarded.

## Employment Benefits:

- Students DO NOT earn sick leave
- Students DO NOT earn vacation leave
- Students DO NOT receive holiday pay
- Students DO NOT receive overtime pay
- Students are compensated ONLY for hours worked

## Confidentiality:

FWS employees may have access to confidential records such as grades, tax returns, and etcetera. FWS employees must treat information seen with all the respect and privacy as any FVSU employee. All FWS employees must sign a Confidentiality Statement before beginning work.

## Expiration of Job Placement:

When the FWS position expires, the student must discontinue employment. If the student earns his/her total FWS award before the end of the employment contract, the student is no longer eligible for payment from FWS funds unless the student is eligible to receive additional funding from the program as funds are available.

## Termination of Employment:

If it becomes necessary to terminate or reassign a student prior to the end of the contract period due to failure to perform the job responsibilities within the scope of the job description, poor work performance, excessive absenteeism, falsification of timesheets, theft, or other reasons as provided by the Supervisor, the Federal Work-Study Coordinator initiates termination with Human Resources.

The Supervisor is not required to warn the student of termination but the Supervisor must provide written explanation of termination and the date of termination to the Federal Work-Study Coordinator.

Students that fail to begin working in the first two pay periods in any semester may be dismissed from the program. The student's award will be revised with the cancellation of FWS. The student and supervisor are notified via email.

## Customer Service:

Questions concerning the Federal Work-Study Program should be directed to the Office of Financial Aid, 1005 State University Drive, Troup Building Room 113, Fort Valley, Georgia, 31030, (478) 825-6363, or financialaid@fvsu.edu.

## Federal Work-Study Reconciliation:

- The Federal Work-Study Coordinator reconciles the FWS program at the end of each month.
- The Federal Work-Study Coordinator uses Banner report(s) to assist with reconciliation of the fund.
- The Payroll Director provides payroll spreadsheets to the Federal Work-Study Coordinator to complete reconciliation process.
- The University's accountant draws down FWS funds from G5.

## FWS Documentation:

- FWSP Position Description Form
- FWSP Payroll Documents
- FVSU Payroll Calendar
- Banner_CWSI_FinancialAid_2014
- FVSU Off Campus Agreement

# ATHLETICS SCHOLARSHIPS

Student athlete awards are subject to all National Collegiate Athletic Association (NCAA) regulations and guidelines. Compliance information and NCAA Compliance Assistant can be utilized at [www.ncaa.org](http://www.ncaa.org). The Office of Financial Aid collaborates with the Athletic Compliance Officer with all related athletic matters.

## GRANT-IN-AID FORMS (GIA)

The Athletic Compliance Officer or Designee will send these via email or route through intercampus mail as new athletes are signed with FVSU. Many of these students have not yet applied for financial aid, but an Office of Financial Aid signature is required. Verify that the student is a Georgia resident (check address on form) and check student's eligibility for the HOPE/Zell Miller Scholarship. All GIAs should be signed and returned to the Athletic Department.

The GIAs should be signed. Return the original via campus mail, make a copy for the student's file and save a copy to the Athletic folder of the F:/drive.

## COMPLIANCE ASSISTANT

Compliance Assistant is the NCAA software system for student athlete reporting. The Athletic Compliance Officer must request access for OSFA staff. The link is: [https://sso.ncaa.org/login?service=https%3A%2F%2Fweb1.ncaa.org%2Fcompliance%2Fexec%2Flogin](https://sso.ncaa.org/login?service=https%3A%2F%2Fweb1.ncaa.org%2Fcompliance%2Fexec%2Flogin). As student athletes are signed or placed on teams, the Athletics Department will add them to this system. Before the beginning of each team's first competition, the PBC must receive a Financial Aid Summary Report (for Division II sports). The Athletic Compliance Officer or OFA designee is required to enter in all financial aid and waivers (with the exception of student loans) into CA for each athlete. The Cost of Attendance (COA) and GIA information is required. These are determined in total by the Athletic Department, but they are based, in part, on our Cost of Attendance figures. Athletics staff may request information on the COA from the OFA.

To enter aid, follow the steps below:

1. Log in to Compliance Assistant through the link above.
2. On the left menu, verify the correct academic year and click on Student athletes.
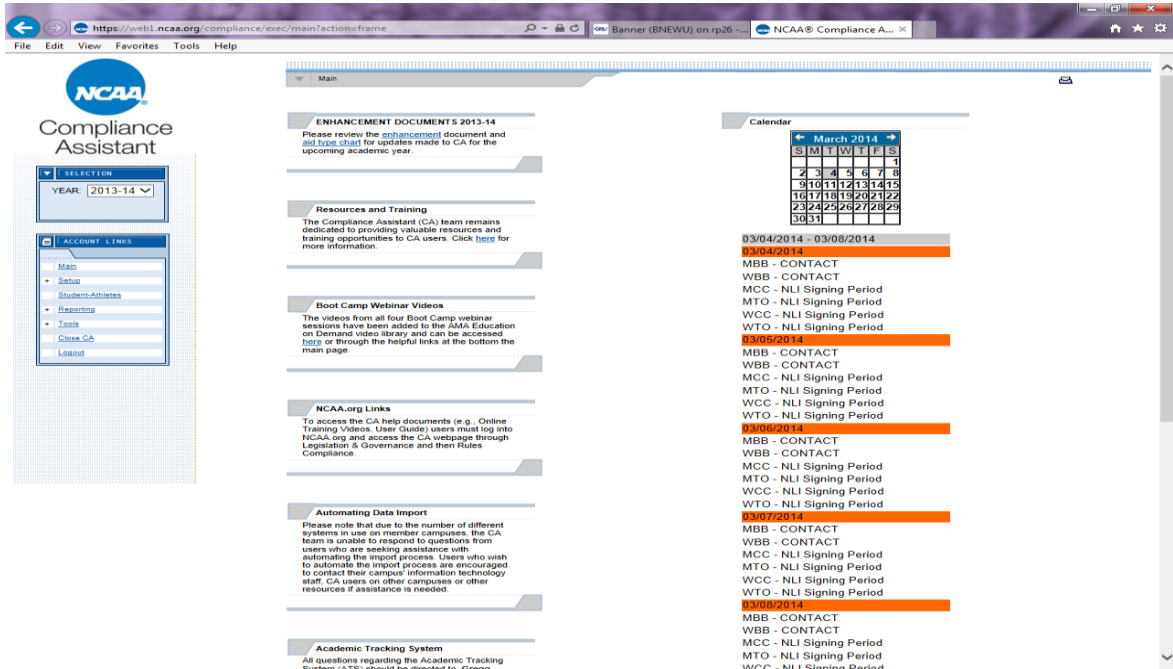


3. This will pull up all of the student athletes for FVSU. Click the Search button at the top of the list (above Email) to search by sport. Select the sport and click Search.
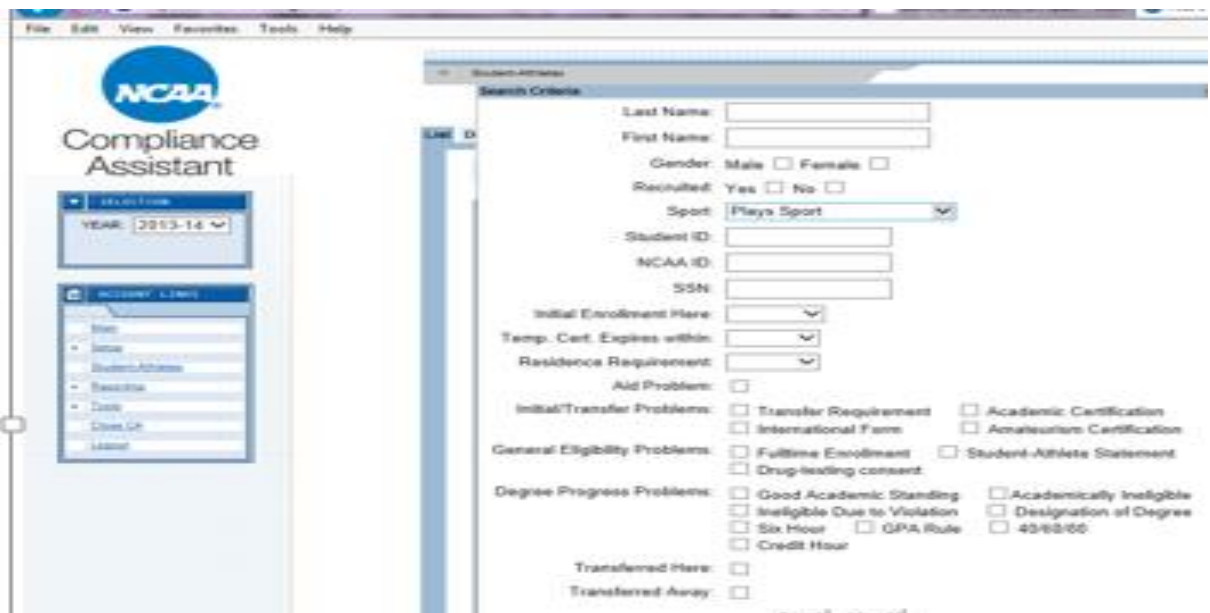
4. This pulls up the detail student information. Click the Financial Aid tab.

5. Select the appropriate GIA and COA code and click "Save." Next, enter all of the financial aid the student receives. Some awards are set to specific amounts. Others need to be manually entered. Out of state waivers also need to be issued. These waivers may vary in amounts based on the student's status, etc. Again, check to ensure the correct amount is posted. The TOTAL Athletics aid should be added as one figure. Leave the Award Period at Full Year unless told by the Athletic Compliance Officer to do otherwise.

To run Financial Aid Summary Reports or Squad Lists

1. From the home screen, click on Reporting on the left-hand side.

2. Click on Standard Reports.



3. Click on Financial Aid Summary Report or Squad List.

4. Select Aid Year (defaults to current), Sport and PDF. Click Run Report.
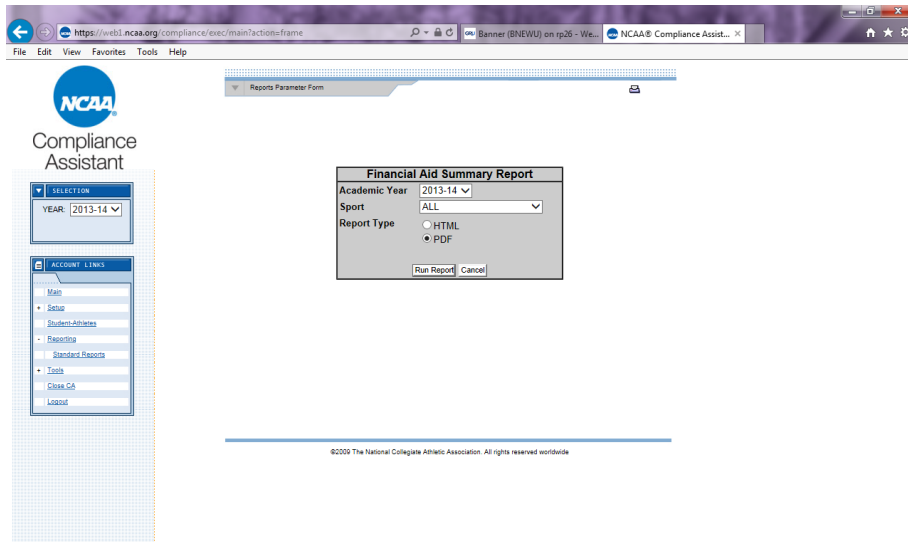


5. Print each report. Complete first "Form completed by:" line and scan and email to Athletics.

## STUDENT-ATHLETE  SCHOLARSHIP WORKSHEETS

Athletic aid cannot be offered in the system until a student is cleared by the NCAA and the Athletic Worksheet is supplied to OSA. In addition, the Scholarship Award Request Form must be received from the Athletic Compliance Officer and approved by Student Financial Services before scholarship are awarded from Foundation accounts.  Typically, the Athletic Department sends the worksheets in batch in early summer.  They should be sorted by sport and a spreadsheet should be created to include name, sport, renewal or new award and scholarship amounts.  Scholarships should be totaled for each sport (i.e. Tuition & Fees for Baseball, Room & Board for Baseball, Athletic Books, etc.).  These totals should be entered in RFRMGMT in order for awards to be offered in RPAAWRD.  The Director or designee must update the award totals on RFRMGMT when applicable.  Once RFRMGMT is updated, all awards should be offered in RPAAWRD.

## OUT-OF-STATE WAIVERS

All students who are receiving out-of-state waivers should be assigned and locked in the appropriate IN-STATE budget group in RBAABUD.  Waivers are NOT added in RPAAWRD as aid.


## STUDENT-ATHLETE CHANGE or WITHDRAWAL FORMS

Student-Athlete Change or Withdrawal forms are sent whenever a student's award amount is being adjusted or not renewed.  Banner must be updated accordingly, and a comment should be added to RHACOMM for any increases or decreases to awards.

# Overpayment

An overpayment is created when a student receives any Title IV funds that exceeds the amount of the student's eligibility. In the event of an overpayment from federal, state, or institutional funds, the Office of Financial Aid will send written notification to the student of their financial liability as soon as the liability is determined.

The student's records will be placed on HOLD in the Banner Financial Aid System on form ROAHOLD until the overpayment has been resolved or the student has made satisfactory repayment arrangements with Student Financial Services.



All unresolved overpayments of the Federal Pell Grant (PELL), Federal Supplemental Educational Opportunity Grant (FSEOG), TEACH Grant, Iraq and Afghanistan Service Grant and the Federal Perkins Loan (PERKINS) are referred to the U. S. Department of Education and added to the National Student Loan Database System.

# Procedures to Certify Loans from ELM

1. Log onto ELMNet, www.elmproduction.com

2. Select Certification Requests

3. Enter the student's SSN or



Name, then click on Select at the bottom

4. If there's more than one loan listed for the student, please select the loan that you need to certify.

# 🍁 Alternative Certification Request

## Program Information

| Program | 091 - Smart Option Student Loan | Guarantor Code | 924 |
|---|---|---|---|
| Lender Code/Branch | 900905 00 | School Code | 001566-00 |
| Lender Name | Sallie Mae Bank | | |
| Credit Expiration Date | | Status | Certification Requested |

## Borrower Information

| | | | |
|---|---|---|---|
| Borrower Last Name | HILL | | |
| Borrower First Name | SETH | Borrower Middle Initial | L |
| SSN | | | |
| Street Address | 702 GREEN | Address #2 | |
| City/State/Zip | FORT VAL | GA  31030 | 4340 |
| Foreign Postal Code | | | |
| Foreign Prefix/Telephone | 706-726-97 | Date of Birth | 04/07/1992 |
| Legal Residence | | Since | |
| Driver's License | | Driver's State | |
| E-Mail Address | | | |
| Requested Amount $ | 4000 | Loan Period | |
| Citizenship Status | | ⦿ | ○ |
| Outstanding Loans | | ○ | ○ |

| | | | |
|---|---|---|---|
| **Borrower Credit Auth. Code** | | ⊙ | ○ |
| **Alien ID #** | | | |

| School Information | | | |
|---|---|---|---|
| **Loan Period** | ___ to ___ | **Grade Level** | [dropdown] |
| **Enrollment Status** | Full ○ Half ○ Less Than Half Time ○ | **Completion Date** | |
| **Cost of attendance** | $ ___ | **Estimated Financial Aid** | $ ___ |
| **Alternative Certified Amount** | $ ___ | **Certified Date** | |
| **Disbursement Date #1** | ___ | **1st Disbursement Hold/Release** | Release ▼ |
| **Disbursement Date #2** | ___ | **2nd Disbursement Hold/Release** | Release ▼ |
| **Disbursement Date #3** | ___ | **3rd Disbursement Hold/Release** | Release ▼ |
| **Disbursement Date #4** | ___ | **4th Disbursement Hold/Release** | Release ▼ |
| **Disbursement Amount #1** | ___ | **Disbursement Amount #2** | ___ |
| **Disbursement Amount #3** | ___ | **Disbursement Amount #4** | ___ |

| Processing Type | Certification Request | School Unique Loan ID | |
|---|---|---|---|
| Promissory Note Delivery Method | Web ▼ | | |
| EFT | Yes ⦿ No ○ | Default | Yes ○ No ○ |
| CL UNIQUEID | | | |
| Receive Date | | Last Update Date | |
| Approved Amount | | | |

Clear | No Defaults ▼

**ELM RESOURCES**

5. Enter the requested information:

   a. Loan Period

   b. Grade Level

   c. Enrollment Status

  d. Completion/Graduation Date (If not sure, give an estimate based on student's grade level)

   e. Alternative Certified Amount

   f. Disbursement Date(s) (The same as the Stafford Loans in BANNER)

   g. Certified Date

   h. Promissory Note Delivery Method – Select Web

6. Accept/Save

7. Print Confirmation

8. Submit/Complete

9. Logout

10. Enter the award on BANNER using ALTLN as the Fund Code



11. Put note in RHACOMM

File  Edit  Options  Block  Item  Record  Query  Tools  Help

Award Maintenance  RPAAWRD 8.14.1  (B330)

**Aid Year:** 1112    **ID:**

Award Maintenance | Award Schedule | Disbursement Schedule

**Fund Awards**

Amounts | Overrides | Locks/ Indicators

| Fund | Description | Status | Offered | Accepted | Declined or Cancelled | Memoed or Authorized | Paid | Reschedule |
|------|-------------|--------|---------|----------|----------------------|----------------------|------|------------|
| ALTLN | Alternative Loans (ALL) | ACPT | 2900.00 | 2900.00 | | | 2900.00 | ☐ |
| DLSU | Federal Direct Subsidized Loan | ACPT | 4500.00 | 4500.00 | | | 4480.00 | ☐ |
| DLUN | Federal Direct Unsub Loan | ACPT | 2000.00 | 2000.00 | | | 1990.00 | ☐ |
| PELL | Federal Pell Grant | ACPT | 4800.00 | 4800.00 | | | 4800.00 | ☐ |
| PLUS | Federal Direct PLUS Loan | ACPT | 1450.00 | 1450.00 | | | 1414.00 | ☐ |
| | | | | | | | | ☐ |
| | | | | | | | | ☐ |
| | | | | | | | | ☐ |
| **Total:** | | | 15650.00 | 15650.00 | | | 15584.00 | |

Summary | Packaging Group | Pell and Loan

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| **Offered:** | 15,650.00 | **Aid Period:** | 12MNSS | | **Budget** | **EFC** | **Gross Need** | **Unmet Need** |
| **Resource:** | .00 | **Pell Aid Period:** | | **FM:** | 31,455.00 | 772 | 30,683.00 | 15,805.00 |
| **Crossover Pell Award:** | | | | **IM:** | | | | |
| **Crossover Aid Year:** | | **Budget Group:** | REOC12 | **Pell:** | 20,970.00 | 772 | | |
| | | | ☐ Period Budget Group Detail | | | | | |
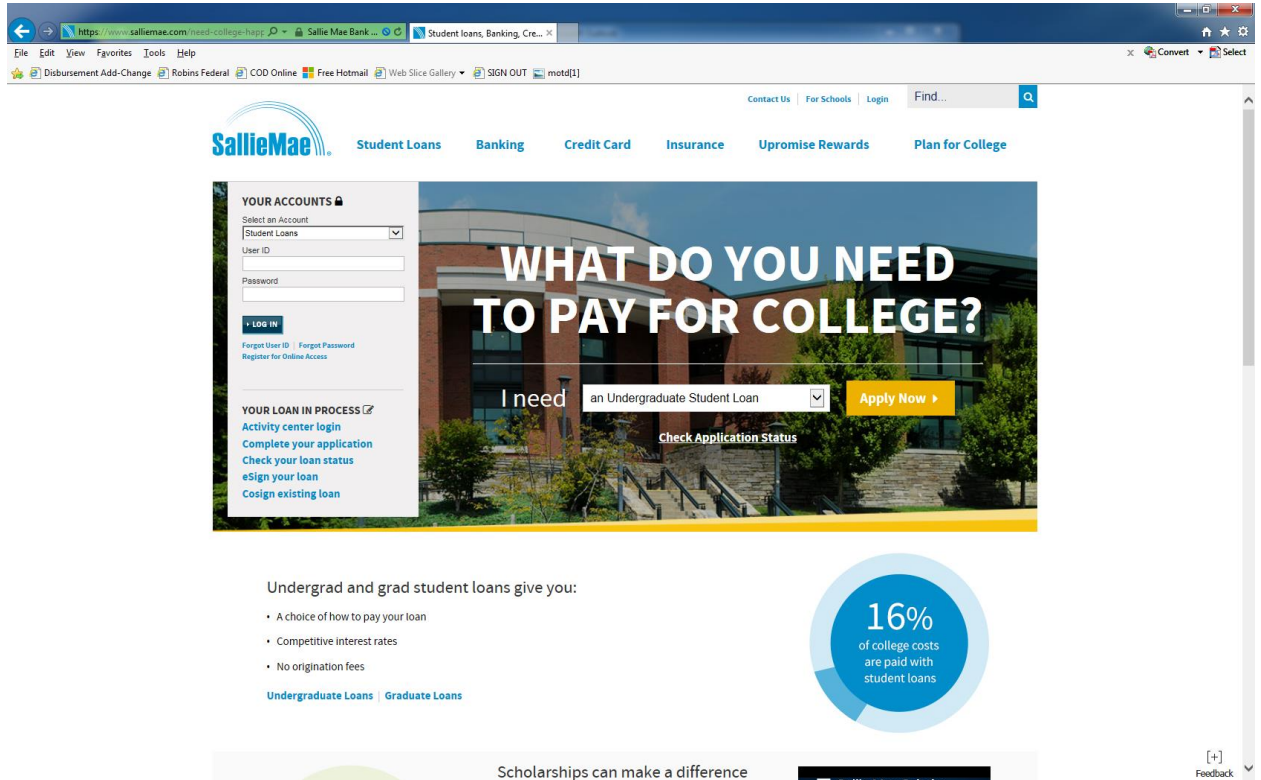
Fund Code; press COUNT QUERY HITS for Applicant Immediate Process, DUPFLD for Auto Packaging

Record: 1/5                    ...                    <OSC>

# Procedures to Certify Loans from OpenNet

1. Log onto OpenNet, www.salliemae.com



- Select For Schools at the Top

- To the right under Reporting tool quick links, select OpenNet, then OPenNet Web Loan Delivery System under School log in

- Log In
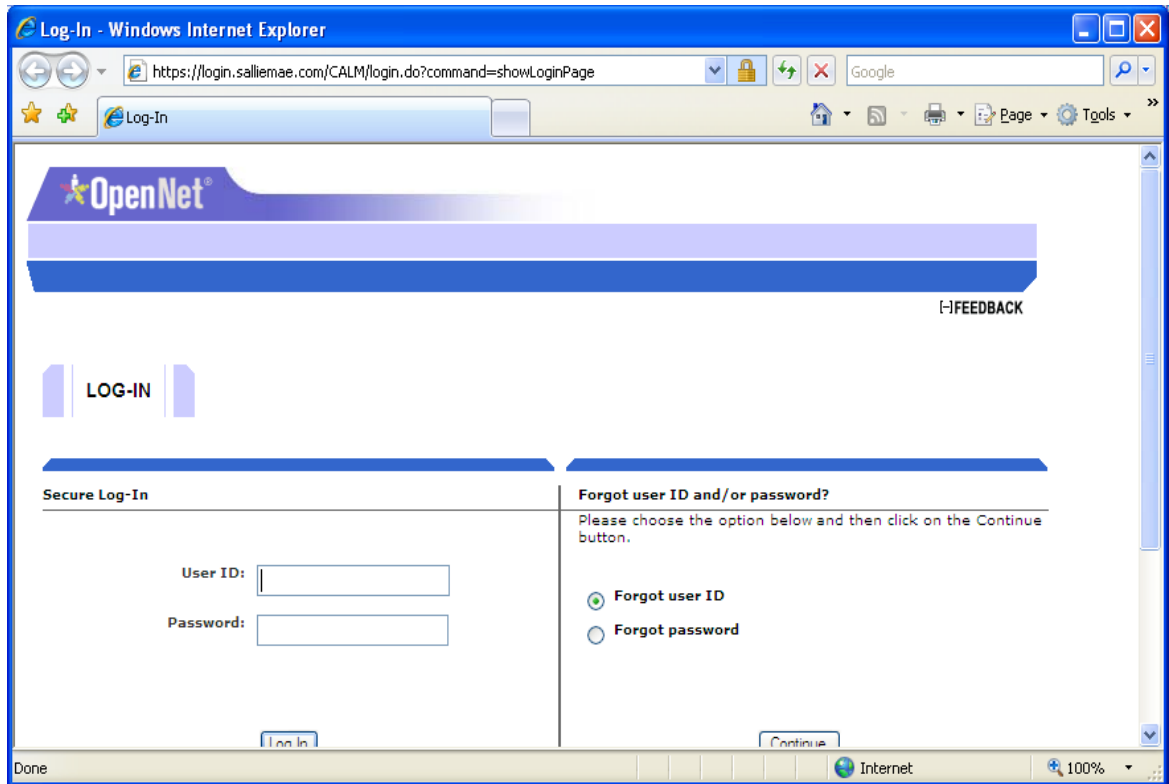


- To the left of the Main Menu, Select Applications Awaiting Certification, View Results
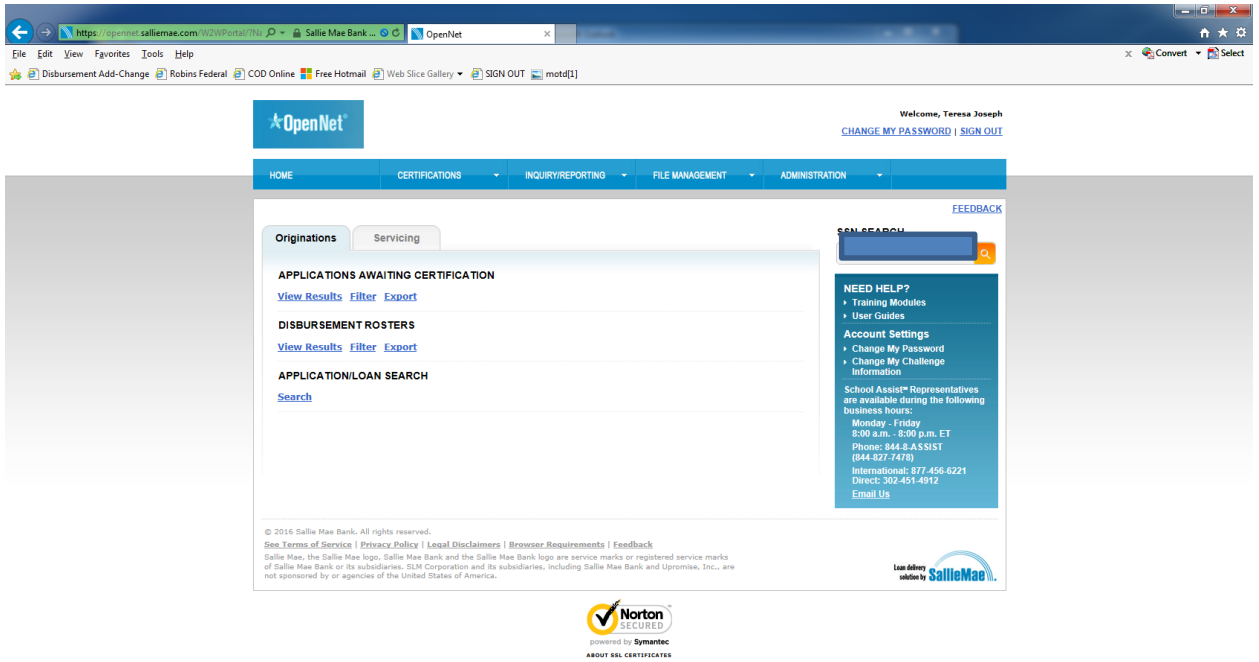
- Enter the student's SSN or Name, then Select at the bottom



Home

Certifications

- Inquiry/Reporting
- File Management
- Administration

**AWAITING CERTIFICATION RESULTS**

To certify an application, (click) on the CERTIFY APP link next to the record you want to certify.

**To certify an application, [  on the CERTI link next to t record you w certify.**

**Report run M February 01, at 9:38:16 A**

**Records 1-3 (of 3)**

| Borrower/ Student SSN | Borrower/ Student Name | Loan Product | School ID | CommonLine Unique ID/ Loan Period | Lender ID | Borrower Requested Amount | Certification Requested | |
|---|---|---|---|---|---|---|---|---|
| | | SMART OPTION STUDENT LOAN | 00156600 | 899984AT100992544 08/15/2015- 07/15/2016 | 900905 | $9000.00 | 12/02/2015 | Certify App  Print  Cancel |

- A list of students will appear.  Select the student that you need to certify to the right of the student's information by selecting Certify App.

Home

Certifications

- Inquiry/Reporting
- File Management
- Administration

**ENTER SCHOOL CERTIFICATION**

Smart Option Student Loan    Borrower ⬇ Cosigner ⬇ Certification ⬇ Disbursem

**Borrower Information**    ⬆ Return

Fields marked with an asterisk(*) are required to continue processing. For your convenience, blank fields are shaded in yellow and should be completed unless otherwise noted.

**Social Security Number:**

**Date of Birth:**

**Name:**

**Email Address:**

**Permanent Address**

**Street Address 1:**

**Street Address 2:**

**City:** FORT VALLEY

**State:** GA **Zip Code:** 31030

**Primary Phone Number:** ⦿ ○ Cell: Home:

**Cosigner Information** ⬆ Return

**Social Security Number:**

**Date of Birth:**

**Name:**

**Initital Values Set:**  [-- Select Initial Value ▼]

**School Name:**  FORT VALLEY STATE UNIVERSITY

**School Code / Branch:**  001566-00

**Lender Name:**  Sallie Mae

**Academic Period for the Loan:** *  **From** [08/15/2015] **To** [07/15/2016] *(ex: mm/dd/yyyy)*

**Grade Level:** *  [Junior Undergraduate ▼]

**Course of Study:** *  [Other ▼]

**Enrollment Status:** *  [Full Time ▼]

**Anticipated Graduation Date:** *  [06/15/2017] *(ex: mm/dd/yyyy)*

**Requested Loan Amount:**  $9,000.00

**Certified Loan Amount:** *  $[        ].00

The approved amount will be the lesser of the borrower requested amount, cosigner requested amou
school certified amount.

**School Use Only:**  [        ]

**Submit Certification Option:**  ☑  **View submission results online**

Please allow for the consumer's Right To Cancel period when setting your disbursement date.

| | Disb Date | Disb Amount | Hold/Release |
|---|---|---|---|
| | *(ex: mm/dd/yyyy)* | *(ex: 3000)* | |
| **Disb 1:** * | | $ [          ].00 | -- Select One ▼ |
| **Disb 2:** | | $ [          ].00 | -- Select One ▼ |
| **Disb 3:** | | $ [          ].00 | -- Select One ▼ |
| **Disb 4:** | | $ [          ].00 | -- Select One ▼ |

As an authorized representative of the school identified above, I hereby certify the following: (i) the borrower is eligible for the loan identifie certification; (ii) the information completed in this school certification is accurate; (iii) the Total Certified Amount does not exceed the studen of attendance minus other financial aid; (iv) that school will notify Sallie Mae if the borrower withdraws from the school; (v) if applicable, the to certification the school has complied with the disclosure requirements in Section 626(1) and all other provisions of the Student Lending Accountability, Transparency and Enforcement Act ("SLATE Act"); (vi) as permitted under applicable law, that the school will provide informa requested by Sallie Mae related to the borrower, including without limitation contact information; and (vii) that the information provided in t application is true, complete and correct to the best of my knowledge and belief.

Cancel

- Enter the requested information:

    i. Loan Period
    j. Grade Level
        a. Enrollment Status
        b. Completion/Graduation Date (If not sure, give an estimate based on student's grade level)
    k. Certified Loan Amount  (If there's a cosigner, student is only eligible for what the cosigner has requested
    l. Disbursement Date(s) (The same as the Stafford Loans in BANNER)
    m. Submit Application Below
    n. Under HOLD/RELEASE select Release



- Review Results, print results for file, then Submit

- Print copy of first 2 pages of Prom Note only (appears in a separate window

- Enter the award on BANNER using ALTLN as the Fund Code



12. If necessary, complete the process for certifying others
13. Put a note in RHACOMM

   Example:  Certified Smart Option Student Loan $4000 for SPR16

# PELL RECONCILIATION

1. Print Pell totals from RFIBUDG and COD.



In COD, select the School Tab, then Select the Entity ID, 71265805.

**U.S. DEPARTMENT OF EDUCATION**
**COMMON ORIGINATION & DISBURSEMENT**

FSA
FEDERAL
STUDENT AID

| Person | School | Batch | Award | Services | User | Support |

## Search Results

HELP

The following schools matched your search.

Records 1 to 4 of 4

| School Name | | Entity ID | City | State |
|---|---|---|---|---|
| FORT VALLEY STATE UNIVERSITY | | 71265805 | FORT VALLEY | GA |
| FORT VALLEY STATE UNIVERSITY - | | 21654504 | MACON | GA |
| FORT VALLEY STATE UNIVERSITY -WARNER ROBINS SITE | | 48775566 | WARNER ROBINS | GA |
| UNIVERSITY OF GEORGIA - FORT VALLEY STATE UNIVERSITY | | 59667220 | FORT VALLEY | GA |

Records 1 to 4 of 4

Export to CSV

**U.S. DEPARTMENT OF EDUCATION**
**COMMON ORIGINATION & DISBURSEMENT**

**FSA** FEDERAL STUDENT AID

| Person | School | Batch | Award | Services | User | Support |

## School Summary Information

HELP

**FORT VALLEY STATE UNIVERSITY**

Enter the default selections here for Program and Award Year:

**Default Program** PELL   **Default Award Year** '15-'16

| Contacts | | | Summary | |
|---|---|---|---|---|
| **Type** | **Name** | **Phone** | Award Year | '15-'16 |
| | | | Program | PELL |
| Direct Loan Financial Aid Officer | CYNTHIA PARKS | (478) 825-6363 | Cash > Net Accepted & Posted Disbursements & older than 30 days | $0.00 |
| Pell Financial Aid Officer | CYNTHIA PARKS | (478) 825-6363 | % of Cash > Net Accepted & Posted Disbursements | -0.30303% |
| FINANCIAL AID ADMINISTRATOR | CYNTHIA A PARKS | (478) 825-6605 | Cash > Net Accepted & Posted Disbursements | ($24,542.00) |
| | | | Current CFL | $8,123,317.72 |

Feb 01 2016 13:11 EST    Home  |  Privacy Act  |  Links  |  Contact Us  |  COD Resources  |  Help  |  Glossary  |  Log Off

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**U.S. DEPARTMENT OF EDUCATION**
**COMMON ORIGINATION & DISBURSEMENT**

**FSA** FEDERAL STUDENT AID

| Person | School | Batch | Award | Services | User | Support |

## School Yearly Totals

HELP

**FORT VALLEY STATE UNIVERSITY**

**Award Year:** '15-'16

| | Total Awarded | Total Disbursed | Recipients |
|---|---|---|---|
| **Total Pell Awards** | $11,111,310.00 | $8,123,317.72 | 1858 |
| | | | |
| **Total TEACH Awards** | $11,124.00 | $7,416.00 | 3 |
| | | | |
| **Total Direct Loan Awards** | - | - | - |
| **Total Subsidized** | $7,920,753.00 | $6,797,089.00 | 1857 |
| **Total Unsubsidized** | $16,267,028.00 | $13,805,901.00 | 2198 |
| **Total PLUS** | $4,858,059.00 | $4,359,482.00 | 542 |
| | | | |
| **Total Perkins** | - | - | - |

Feb 02 2016 09:23 EST    Home  |  Privacy Act  |  Links  |  Contact Us  |  COD Resources  |  Help  |  Glossary  |  Log Off

2. Load all Pell files (pgas16op.001, pgmr16op.001, & prgr16op.dat) from the FINAID folder individually in RERFI16
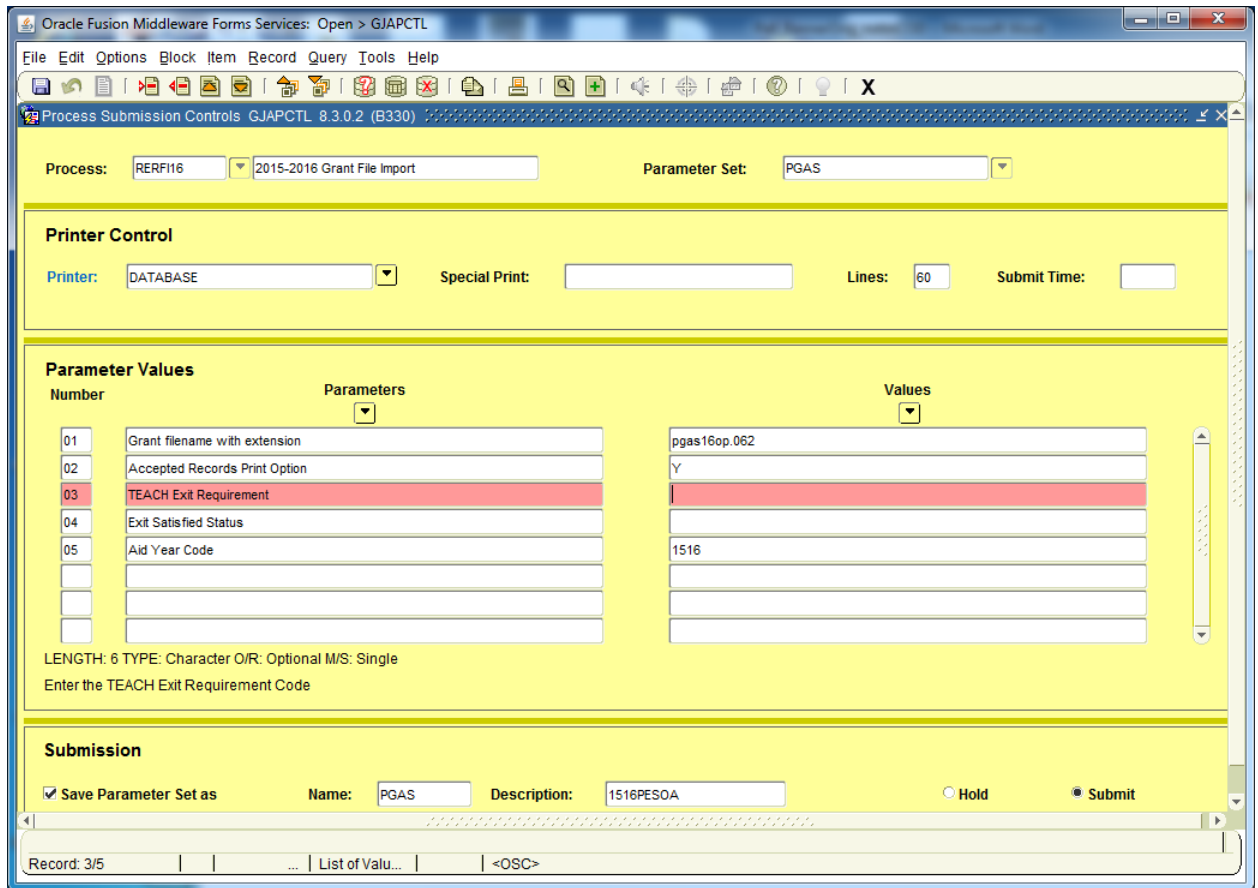


Review output

Username: Connected.

Run Sequence Number...................................:

File Name: /B330/userdata/finaid/pgas16op.062

Processing message class PGAS16OP...

Batch Number: #A2016001566201601229231901
Reported Number of Records: 2
Accepted and Corrected Number of Records: 2
Accepted and Corrected Total of Batch: $0.00
Accepted and Corrected Total Sign Ind: P
Number of Duplicate Records: 0
Connected.
Connected.
Connected.
Connected.

```
31-JAN-2016 03:51:08 PM   Fort Valley State University
1
Aid Year: 1516
RERFI16
-------------------------------------------------------------------------------
---
                      STATEMENT OF ACCOUNT BATCHES
-------------------------------------------------------------------------------
---

Batch ID
Message Code   Message Text
-------------------------------------------------------------------------------
---
#A201600156620160129231901
```

000        No batch level errors for batch
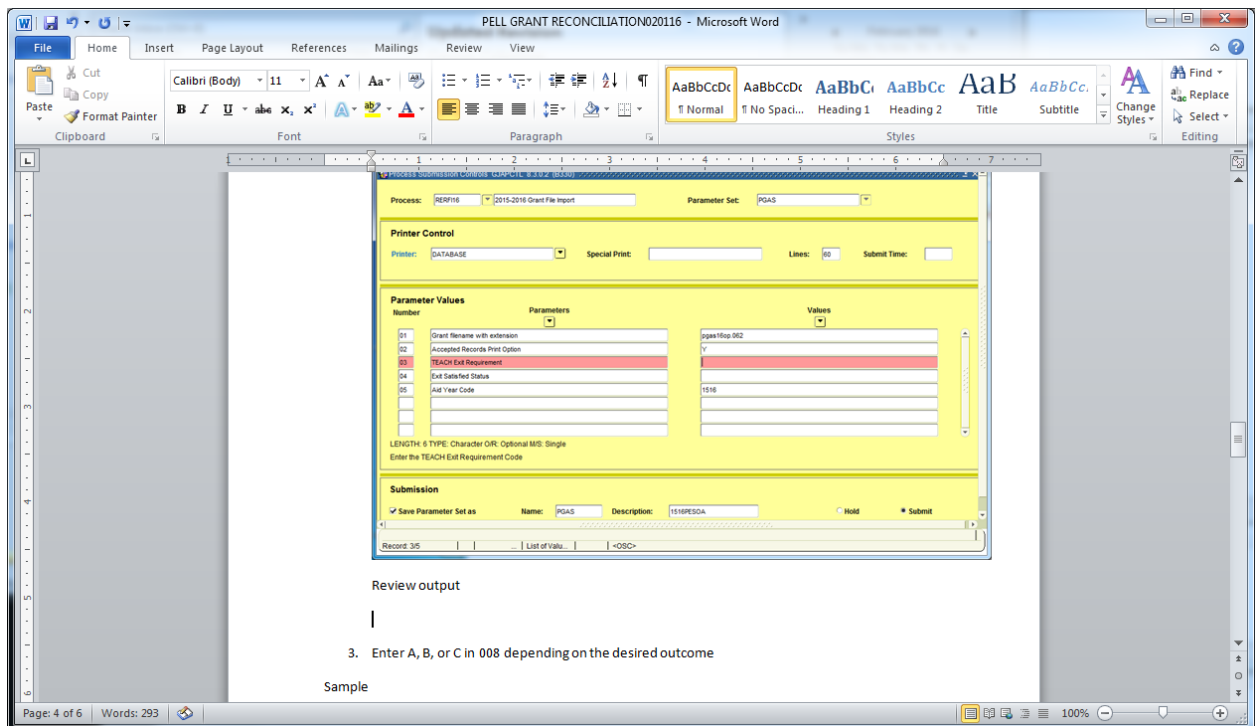


Repeat process until all files have been loaded.

3. Enter RERGRNT to receive report.  Depending on the desired output enter
   one of the following for Number 11:

   A = All Grant Recipients

   B = Banner Orig, No COD Record

   C = COD Record, No BANNER Orig

Output Sample

```
31-JAN-2016 03:57:54 PM                     Fort Valley State
University                                  PAGE      1
Aid Year: 1516                              Grant COD Miscellaneous
Report                                      RERGRNT
-------------------------------------------------------------------------
----------------------------------------------------------
Year To Date Records: All Grant Recipients
```

Program Type:  Pell

```
ID: 000000000   Name:                     Origination ID:
111111111AC201600156600
Banner   Trans#:02  Verif Msg:2  Verif Stat:     Addl Elig:N  Offer Amt:
5775.00     Acpt Amt:   5775.00    Pd. Amt:   2888.00
COD      Trans#:              Verif Stat:     Addl Elig:
Acpt Amt:            YTD Amt:

ID: 111111111   Name:                     Origination ID:
222222222BA201600156600
Banner   Trans#:03  Verif Msg:1  Verif Stat:V    Addl Elig:N  Offer Amt:
5775.00     Acpt Amt:   5775.00    Pd. Amt:   2888.00
COD      Trans#:              Verif Stat:     Addl Elig:
Acpt Amt:            YTD Amt:

Records printed : 2,173

Banner Totals:
-------------
Offered Amount:     11000085.00
Accepted Amount:    11000085.00
Paid Amount:         8252593.00

COD Totals:
-----------
Accepted Amount:    10492344.00
YTD Paid Amount:     4090348.04
```

------------------------------------------------------------------------
--------------------------------------------------------

Report Name.......................................................: RERGRNT
Version...........................................................: 8.9

Report Sequence Number............................................: 1936997
Aid Year Code.....................................................: 1516
Grant Type........................................................: PL
Select All with Verification Code of W............................: N
Select System Gen Disb Nos........................................: N
Select All with Grant Disb Locked.................................: N
Selected MRR record type(s).......................................:
Select All AP, No Disb. Ack.......................................: N
Select All AP, Charges not accepted...............................: N
Select All Rejected Origination Records...........................: N
Select All Rejected Disbursement Records..........................: N
Selected YTD reporting option(s)..................................:
    All Grant Recipients                                      : A
Application Code..................................................:
Selection ID.....................................................:
Creator ID.......................................................:
User ID..........................................................:
Number of lines per page..........................................: 55

    4.  Compare Pell totals.

    5.  Begin reviewing and resolving all discrepancies on the report.

# Direct Loan Reconciliation Policy and Procedure

An assigned financial aid advisor completes the direct loan reconciliation process on a monthly basis. SCT Banner is used to complete the reconciliation. The Cash Activity Amount (Cash Drawdown) from Common Origination & Disbursement (COD) is recorded in Banner on form RPACASH.

The School Account Statement (SAS) files (DSDF and DSLF) are received from COD on the first weekend of each month. The SAS files are loaded into Banner using Banner Process RLRDUXX.



RLRDLRC is the Banner process ran to produce the reconciliation report. This report compares Banner files with COD files.



Discrepancies are determined and adjustments are made accordingly.

**December 2015 Direct Loan Reconciliation Report**

| Banner Paid Amounts | COD Loan Amounts | Difference |
| --- | --- | --- |
| 13,250,165.00 | 13,153,584.00 | 96,581.00 |

**Direct Loan – Loan Level**

Banner Paid Loan Amounts <> COD Loan Amounts

| Name | ID | FUND | Loan Type | Loan ID | Banner Net Amount | COD Net Amount | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Baker,Ashley | 910138839 | DLUN | Unsub. Stafford | | 3463 | 1979 | |
| Bray,Presley | 910142373 | DLSU | Sub. Stafford | | 2227 | 1732 | |
| Bryant,Devontavious | 910133185 | DLUN | Unsub. Stafford | | 1636 | 2968 | |
| Culberson,Jeremy | 910119176 | DLSU | Sub. Stafford | | 431 | 1732 | |
| Culberson,Jeremy | 910119176 | DLUN | Unsub. Stafford | | 0 | 990 | |
| Goggins,Amber | 910126584 | DLUN | Unsub. Stafford | | 2013 | 2968 | |
| Harris,Andre | 910135193 | DLUN | Unsub. Stafford | | 1980 | 0 | |
| Kendrick,MarRhonda | 910140646 | DLUN | Unsub. Stafford | | 0 | 1979 | |
| Prather,Iesha | 910147710 | DLGUN | Unsub. Stafford | | 7324 | 9589 | |
| Simpkins,Desiri-Ilana | 910148940 | DLSU | Sub. Stafford | | 2227 | 1732 | |
| Wells,Tina | 910088746 | DLGUN | Unsub. Stafford | | 8413 | 9589 | |
| | | | | Totals | 29,714.00 | 35,258.00 | (5,544.00) |

**Direct Loan – Loan Level**

Banner Paid Loan Amount, No COD Record

| Name | ID | FUND | Loan Type | Loan ID | Banner Net Amount | |
| --- | --- | --- | --- | --- | --- | --- |
| Brown,Matthew | 910133137 | DLSU | Sub. Stafford | | 0 | |
| Brown,Matthew | 910133137 | DLUN | Unsub. Stafford | | 2624 | |
| Butler,Joshua | 910084884 | DLSU | Sub. Stafford | | 2721 | |
| Butler,Joshua | 910084884 | DLUN | Unsub. Stafford | | 3463 | |
| Carlyle,Jasmine | 910085113 | DLGUN | Unsub. Stafford | | 9589 | |
| Valcarcel,Nicole | 910149146 | DLSU | Sub. Stafford | | 1732 | |
| Valcarcel,Nicole | 910149146 | DLUN | Unsub. Stafford | | 990 | |
| Walker,Tanzania | 910142742 | DLSU | Sub. Stafford | | 1732 | |
| Walker,Tanzania | 910142742 | DLUN | Unsub. Stafford | | 990 | |
| Williams,Edarious | 910136221 | DLSU | Sub. Stafford | | 990 | |
| | | | | Total | 102,125.00 | 102,125.00 |
| | | | | | | 96,581.00 |

The report is forwarded to Accounting Services to be compared with totals from G5.

# Instructions for Printing Banner Letters

1.  **Open MSWord**

2.  Select **document name**,
    **FA_New_Student_Missing_Information_Letter_Template_Rev2**.

3.  The screen below will prompt you for a selection; Select **"Yes"**
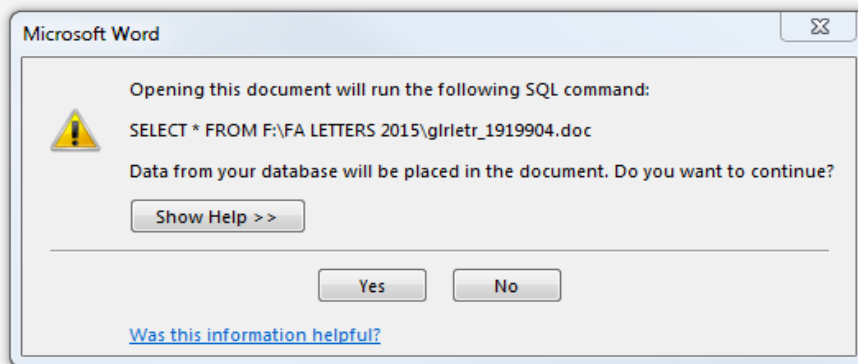


4.  The *Missing Information Letter* will display:  See example below.

    **NOTE:  Check all individual letters when merged to make sure that the pagination in correct and information on letter is posted properly. Manual adjustments to the letter(s) may be required in some instances.**

Fort Valley State
University → → Office of Financial Aid
A State and Land Grant University → 1005 State University Drive * Fort Valley, GA 31030-4313
University System of Georgia

# *Missing Information Letter*

December 10, 2015

**«FNAME» «LNAME»** → → → → → → Student ID: «FVSU_ID»
«STR1»
«STR2»
«CITY», «STATE»  «ZIPC»

«INTRO»

The Fort Valley State University (FVSU) Office of Financial Aid has received your Student Aid Report (SAR) for «AIDY_YR_DESC».  Before your application for financial assistance can be processed, you must submit the requested documents listed below:

«AWARD_REQUIREMENTS_MESSAGES»

If you have been assigned a Banner Web Account, you may follow the instructions for access to your financial aid information at http://www.fvsu.edu/financial_aid/students/check_your_status.  Also, you can find our documents and forms located at http://www.fvsu.edu/financial_aid/students/documents_and_forms.

Please return all required documents to the Fort Valley State University (FVSU) Office of Financial Aid, 1005 State University Drive, Fort Valley, Georgia 31030 or fax them to (478) 825-6976.  **Be sure to sign all documents and write your full legal name and FVSU ID number on every page of the document(s).**

This will be the only letter mailed to you regarding missing documentation.  All future correspondence will be sent to your FVSU Wildcat email address, «EMAIL», which is assigned at the time of your official acceptance to the university.  You may refer to https://fvsu.gabest.usg.edu for assistance with your email account.

If you have any questions, please do not hesitate to call for assistance at (478) 825-6363.

Go Wildcat!

Office of Financial Aid
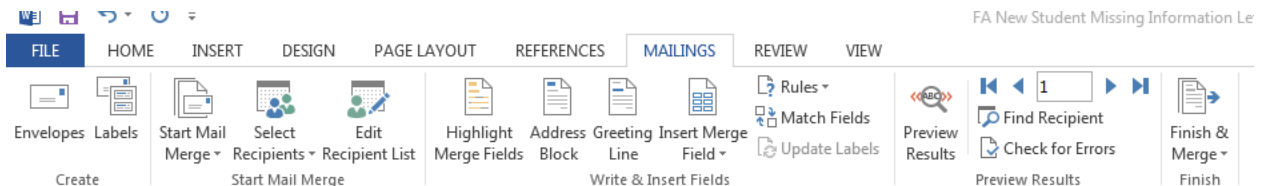
5. Select **Mailings** on the menu bar
6. Select **Start Mail Merge** then **Letters**

7. Select **Recipients** on the menu bar then **Use an Existing List**

8. Retrieve existing list from **F:/FA Letters 2015** (or applicable folder)

9. Select the correct set of recipients from the **glrletr_* files (i.e. glrletr_191811)**

10. Select the **Finish & Merge** tab from the menu bar then**, Edit Individual Documents**, then **Merge Records = All**
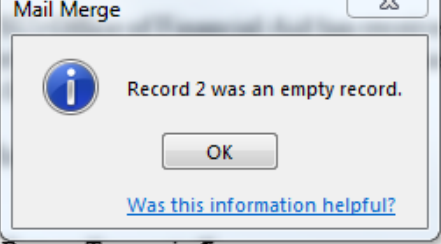
The Fort Valley State University (FV... ...d your Student Aid Report (SAR) for AID YEAR 2015-2016. B... ...stance can be processed, you must submit the requested documents

Copy of Parent(s) 2014 Federal Tax F...
Parent(s) Federal Tax Transcript¶

Copy of Student(s) 2014 Federal Tax Return Transcript¶
Student(s) Federal Tax Transcript¶

If you have been assigned a Banner Web Account, you may follow the instructions for access to your financial aid information at http://www.fvsu.edu/financial_aid/students/check_your_status. Also, you can find our documents and forms located at http://www.fvsu.edu/financial_aid/students/documents_and_forms. ¶

Please return all required documents to the Fort Valley State University (FVSU) Office of Financial Aid, 1005 State University Drive, Fort Valley, Georgia 31030 or fax them to (478) 825-6976. **Be sure to sign all documents and write your full legal name and FVSU ID number on every page of the document(s).**¶

This will be the only letter mailed to you regarding missing documentation. All future correspondence will

Mail Merge

Record 2 was an empty record.

OK

Was this information helpful?

11. Save the file to **F:/FA LETTERS 2015** (or designated folder); Use Naming format: **Letters_<date>_glrletr_<document number>.
(i.e. Letters_121015_glrletr_1919904)**

12. **Print and mail letters**

# TD Client

The Office of Financial Aid using the TD Client software solution (Atomic) to run automated financial aid processes on a scheduled basis.

TD Client is used to send and receive File Transfer Protocol for Title IV data transmissions securely over the internet.  The software is used in conjunction with EDConnect.

In the automation process, staff is notified by email when processes have been completed and additional action is needed when applicable.

# Appendix

The following documentation is included as reference material:

- Satisfactory Academic Progress Policy
- Satisfactory Academic Progress Appeal Form
- FVSU Consortium Agreement
- FVSU Processing Documents
- TD Client Information
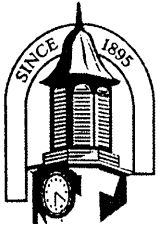
## SATISFACTORY ACADEMIC PROGRESS POLICY
### Effective Fall Semester 2015

## Foreword

Satisfactory Academic Progress (SAP) requirements are contained in three sections of the regulations:  Section 668.16(e), 668.32, and 668.34.  Section 668.16(e) specifies that in order to be considered administratively capable, a school must establish publish, and apply reasonable standards for measuring whether a student is maintaining SAP. Reasonable standards are the same as or stricter than the schools' standards for students enrolled in the same program who are not Title IV recipients, and contain both qualitative (grade-based) and quantitative (pace) standards.  In order to comply with the federal regulations governing SAP, Fort Valley State University has established, published, and will apply the following standards to ensure students are satisfactorily progressing toward degree completion.  Fort Valley State University (FVSU) semester is considered a trailer term with Fall and Spring being the primary academic year.

Satisfactory Academic Progress must be maintained to remain eligible to receive Title IV aid.  Title IV aid includes Federal Pell Grants (PELL), Federal Supplemental Educational Opportunity Grants (FSEOG), TEACH Grants, Federal Work Study (FWS), Federal Direct Loans and Federal Perkins Loans.  SAP is determined by measuring the student's cumulative grade point average (GPA) and the student's rate of progression (PACE) toward degree completion.

## Policy

In accordance with federal regulations, the guidelines used to determine SAP are as follows:

- SAP will be calculated at the end of every semester.
- A student failing to meet the SAP standards for the first time at the end of a semester will be placed in an SAP **"Warning"** status**.**
- A student may continue to receive financial aid for **one** payment period while in a **"Warning"** status.
- A student failing to meet the SAP standards after an initial **"Warning"** will no longer be eligible to receive financial aid.  The student will be placed in a **"Suspended"** status.
- A student in a **"Probation"** status **must** successfully maintain the terms of his/her Academic Advisement Progress Assessment Plan.  Failure to comply with the plan will result in a student being placed in a **"Suspended"** status.  The student will be responsible for paying all educational costs until evidence of academic success is shown or SAP standards are reached.
- Students who have reached the Maximum Allowable Time Frame (MATF) or Learning Support maximum hours will be automatically placed in a **"Suspended"** status.

- A student in a **"Suspended"** status may submit a SAP Appeal Form.  If the appeal is approved, the student will be placed in a **"Probationary"** status.
- Effective Fall 2015, a student may receive only **3** approved appeals.
- SAP requires monitoring of both GPA (qualitative) and Pace (quantitative).

## Qualitative Component (GPA)

All financial aid recipients of Title IV aid will be reviewed by the Office of Financial Aid at the end of every term (fall, spring, and summer).  Students not meeting the below standards will be placed on financial aid **suspension**.  Students may submit a formal appeal for reinstatement of aid.

| Undergraduate Credit Level (Hours Attempted) | Minimum Required Overall GPA |
|---|---|
| 0-29 | 1.70 |
| 30-59 | 1.90 |
| 60-89 | 2.00 |
| 90 and above | 2.00 |

**Graduate students** must maintain a **3.00 GPA** throughout their enrollment at FVSU.

## Quantitative Component (Pace)

All financial aid recipients are expected to earn a minimum percentage of their total hours attempted (including learning support attempted hours and all attempts for courses repeated), and must complete degree requirements within the maximum allowable time frame (MATF). This quantitative measure is called **Pace**.

A. Students must successfully complete courses attempted.  The minimum acceptable course completion rate is **67%** of the total hours attempted.  Successful completion is limited to the grades of **A, B, C, D and S**. The grades of **F, WF, W, WP, U, I, and IP** are considered unsuccessful attempts. Pace is calculated by dividing earned hours by attempted hours.
B. Students must complete the program of study within a reasonable time frame.  The **MATF** is **150%** of the total hours required for degree completion.  This applies to all undergraduate and graduate programs of study.   For example, degree programs requiring **120** hours for degree completion will be allowed up to **180** attempted hours (120 x 1.5 = 180).
C. If a student is granted Academic Amnesty/Renewal, all hours are still subject to the overall standards for Satisfactory Academic Progress.

## Student Classifications

**UNDERGRADUATE STUDENTS** must maintain the required minimum GPA and Pace.

**New Transfer Students -** New transfer students will be monitored at the time of matriculation.  All courses accepted by FVSU for transfer credit will be calculated in SAP.

**Repetition of Courses/Withdrawals, and Incompletes –** All attempts at a course are counted in the maximum hours allowed to obtain a degree.  Excessive incompletes can result in the suspension of financial aid.  Refer to the FVSU Catalog for more information relating to the maximum credit hours allowed by the Institution for withdrawals.

**Learning Support Students -** Financial aid is available for thirty (30) attempted hours of Learning Support coursework (including FVSU attempted hours and transfer attempted hours). Students required to take Learning Support coursework will be monitored each semester after grading. Students who voluntarily take Learning Support coursework are ineligible for Title IV aid.  Any student who registers for Learning Support coursework, knowingly or unknowingly, in excess of the maximum 30 hours must repay all aid received.

**Double Majors –** Students with double majors will be allowed an additional 45 attempted hours not to exceed a total of 232 attempted hours. They must also maintain the minimum required overall GPA based on their attempted hours.

**Post-Baccalaureate –** Post baccalaureate students are required to maintain a minimum 2.00 GPA.  Students may be asked to submit a **Post-Baccalaureate Certification Form**.

**Preparatory Coursework** - Students not enrolled in a degree program are eligible for loans for one consecutive 12 month period if they are taking coursework required for enrollment in an eligible program.  Students must maintain minimum GPA requirements.

**GRADUATE STUDENTS** require a minimum 3.00 GPA.  SAP standards will be monitored every semester after grading.  Any graduate student found in violation of these standards will be place in **suspension** with an opportunity to appeal.

**Additional Degree**   Attempted hours from a prior degree are not included in the SAP calculation unless those hours are transferred to the new program.

## SAP Definitions:

**Satisfactory:**   Student is meeting both qualitative and quantitative standards.   FOR SAP purposes, the student maintains eligibility for financial aid.

**Warning**:  A student in satisfactory status failing to meet one or both of the SAP standards for the first time at the end of a semester will be placed in this status.  The student is eligible for financial aid while in this status.  If not meeting the minimum SAP requirements at the end of the warning period, the student will be placed in suspension.

**Suspension**:   A student fails to meet the minimum SAP standards and are ineligible to receive aid.

**Probation**:   If a student's SAP appeal is approved, the student will be placed on probation.   Under this status, the student is required to submit and follow the terms of an Academic Advisement Progress Assessment Plan.

## Appeal Process

**Appeals that are incomplete and/or lack sufficient documentation will automatically be denied.**

In cases of extreme and/or unusual circumstances, students may submit an **SAP Appeal Form** to the Office of Financial Aid (OFA). The appeal must be specific, in writing, and must address the student's entire previous academic performance as well as steps the student is taking or will take to improve academic success.  The student should also submit any supporting documentation at this time.   Only **3** appeals may be submitted during a student's enrollment at Fort Valley State University.

As appeals are submitted to the Office of Financial Aid, current enrollment status is verified.  If students are not enrolled, a decision will not be made until which time the student enrolls at FVSU.  The student may be asked to submit a new appeal.

Students must pay for tuition, fees and other educational expenses out-of-pocket until a decision has been made regarding their SAP Appeal.  A pending SAP Appeal does not supersede other enrollment requirements.

Appeal decisions are based on criteria stated on the appeal form.  These criteria state that appeals should be for non-academic reasons including but limited to:
- serious injury, illness, medical or mental health condition involving student or immediate family member
- death of an immediate family member
- other non-academic circumstances beyond the student's control

The following are examples of acceptable documentation to support an appeal:

- statement from physician or health professional
- copy of death certificate or obituary

Students appealing Maximum Allowable Time Frame must complete and submit both the SAP Appeal Form and Academic Advisement Progress Assessment Plan.

Appeal decisions are communicated via institutional email.

At the discretion of the Director of Financial Aid, a student may submit a request for review of the appeal decision made by a Financial Aid Advisor and/or the Financial Aid Appeals Committee.

## Academic Advisement Progress Assessment Plan

The **Academic Advisement Progress Assessment Plan** is available on the OFA website and must be completed with the student's academic advisor. The Progress Assessment Plan serves as a guideline to assist students in planning out a schedule of coursework that will enable the student to have success in improving his/her SAP status. It should reflect all of the coursework required for the current semester and subsequent semesters for the academic year. If the student's appeal has been approved, the student will be placed in a "**Probation**" status. During the probationary period, students must satisfactorily complete all hours attempted and maintain a minimum 2.50 term GPA. Upon successful completion of the initial Progress Assessment Plan, a student will be required to submit a **new** Plan for the subsequent academic year(s) if his/her SAP status remains below the minimum standards.

Academic performance of students on **Probation** is monitored at the end of every term. Students who receive grades of F, I, W, WF, U or IP are in violation of their probation status. If they remain below the standards, they will be placed back in **Suspension**, and their subsequent aid will be canceled.

**Regaining Eligibility**

Students not making SAP may reestablish eligibility on their own by taking action that brings them into compliance with the standards. In most cases, this means they are paying out of pocket and performing well academically.

**Notifications and Appeals**

Students not making SAP will be notified via their FVSU email. SAP status is also viewable on the students' Banner Web account. Students who wish to appeal a determination of SAP must do so no later than the deadlines published on the FVSU Office of Financial Aid website. Appeals received after the published deadline dates will not be reviewed but will be considered for the subsequent term.

All appeal decisions are final and cannot be appealed beyond the Director of Financial Aid.

**Fort Valley State University**

**Office of Financial Aid**

A State and Land Grant University
University System of Georgia

1005 State University Drive * Fort Valley, GA  31030-4313
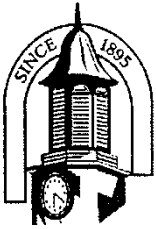
## Satisfactory Academic Progress Appeal Form
*Term Deadlines:  Fall Term, July 15th;  Spring Term, December 15th;  Summer Term, May 15th*

**Name:** _____

**FVSU Student ID:** _____

**Address:** _____

**FVSU Email:** _____

**Cell Phone Number:** _____

**Appeal Term:** _____

**Major:** _____

**Graduation Date:** _____

Dear Student:

You may appeal the suspension of your financial aid eligibility resulting from your failure to meet the University's minimum standards governing Satisfactory Academic Progress (SAP) by submitting this form, along with supporting documentation of the extenuating circumstances which have affected your academic progress, by the appropriate deadline date.  Only valid appeals will be reviewed by the Financial Aid Advisor or Financial Aid Review Committee as applicable.  A valid appeal includes the SAP Appeal Form, the Progress Assessment Plan, and the Appeal Statement.  ***Incomplete appeals will not be reviewed and will automatically be DENIED and WILL NOT be reviewed again for the term submitted. Only appeals with documented extenuating circumstances will be considered.  Appeals received after the deadline date will be considered for the next term.***  Decisions on completed appeals should be available within two weeks after grades are posted.  All decisions by the Committee are final and cannot be appealed further.  You will need to access your Banner Web account to review the results of the appeal decision.  Click on the Active Messages link within the Financial Aid Status Section.  **An approved appeal decision may impose limitations upon your financial aid eligibility and/or future minimum academic standards**.  Your progress will be reviewed at the end of each term.  Should you earn an unsatisfactory grade (i. e. F, WF, W, U, or I) in a course or fall below the minimum GPA requirement, your financial aid will be suspended.  A copy of the Satisfactory Academic Progress Policy can be found on the Fort Valley State University Office of Financial Aid web site: www.fvsu.edu/.

*For Office of Financial Aid Use Only:*

Cum. Hours Earned_____          Cum. Hours Attempted_____     SAP Pace % _____          Number of Appeals:_____

Cum GPA: _____          Required GPA: _____                              Approved: _____          Denied: _____

Reason for Decision:

_____

_____

Reviewed by:_____ Date:_____

Name:_____     ID#_____

**DESCRIPTION OF EXTENUATING CIRCUMSTANCES AND REQUIRED DOCUMENTATION**
*(This is not all inclusive and "employment status" does not qualify as an extenuating circumstance.)*

**CHECK ONE:**
**___I. *Personal injury, illness, or physical disability***
**REQUIRED DOCUMENTATION (Please attach):**
Student's statement of circumstances, detailing medical condition that impaired performance and why future academic performance will not be impaired by condition.  Statement from doctor, Health Services, and/or the Office of Diagnostic Testing and Disability Services describing the medical condition that impaired academic performance.  The statement should specifically address the following:

- Student's limiting medical condition and date span for which condition(s) existed.
- How the condition may have impaired academic performance.
- The student has rehabilitated to such an extent that the medical condition should not significantly impair future academic performance.

**___II. *Death/Illness of immediate family member***
**REQUIRED DOCUMENTATION (Please attach)**
Student's statement detailing circumstances impairing performance and why future academic performance will not be impaired by circumstances.

- If illness of immediate family member:  Statement from doctor detailing medical condition incurred by family member. Statement should specifically address medical condition and date span for which the condition existed.
- If deceased:  Death certificate or obituary.

**___III. *Completed Degree requirements***
**REQUIRED DOCUMENTATION (Please attach)**
For second degree (i.e. second bachelor's degree; second master's degree; third master's degree, etc.), an itemized list of required courses to complete the second degree along with the advisor's signature.  **(Statements that refer to another document such as "See Catalog" are not acceptable!)**

**___IV. *Maximum Allowable Timeframe (Exceeds Number of Attempted Hours Allowed)***
**REQUIRED DOCUMENTATION (Please attach)**

- A completed *Academic Advisement Progress Assessment Form.* This form is attached.
- Student statement detailing circumstances impairing performance and why future academic performance will not be impaired.

**___V. *Unsatisfactory Grade Point Average (GPA) and/or Pace does not meet the 67% minimum requirement***
**REQUIRED DOCUMENTATION (Please attach)**

- Student statement detailing circumstances impairing performance and why future academic performance will not be impaired by circumstances.

**___VI. *Other Extenuating Circumstance***
**REQUIRED DOCUMENTATION (Please attach)**

_____          _____
Student Signature                                                                      Date

Name:_____          ID#_____

## Satisfactory Academic Progress Appeal Form
## Academic Advisement Progress Assessment Plan

**This form *must be completed by your academic advisor*.** P**lease take this form to your academic advisor in the Academic Advising Center (478-822-1325).** It must be submitted as part of the Financial Aid Appeal. Appeals submitted without an Academic Advisement Progress Assessment Form will not be considered.

Degree and Major: _____  _____ _ _____
<div align="center">Degree            Major            Required Hours</div>

Expected Graduation Date: _____

The objective of the academic advisement progress assessment is to determine the student's ability to meet the required standards of progress as outlined in the University's policy governing Satisfactory Academic Progress.  Paramount to this assessment is the student's ability to complete his/her academic program within the maximum allowable timeframe (total ***attempted*** hours cannot exceed 150% of the number of hours in the degree program) with the minimum GPA required for graduation.   In order for an appeal to be granted, it must be mathematically possible for a student to achieve the minimum progress standards within the one term of probation or the student must meet all requirements of the academic progress contract developed by the Academic Success Center. The contract must take into account the maximum allowed timeframe to complete the degree requirements. Please list all of the courses the student must take and pass, along with the required GPA, for each semester of the probationary term(s).  Also, please project the grade point average required to eliminate any GPA deficiency within the probationary term (if applicable). On the reverse side of this form, please submit a written statement as to whether you believe it is mathematically possible for this student to regain Title IV eligibility within the probationary term.  You and your academic advisor must sign and maintain a copy of this form.

| FA2015 (Semester & Year) | Credit Hours | FA_____ | Credit Hours | SP_____ | Credit Hours | SU_____ | Credit Hours |
|---|---|---|---|---|---|---|---|
| *ENGL 1100* | 3 | | | | | | |
| *BIOL 1102* | 3 | | | | | | |
| *BIOL 1102A* | 1 | | | | | | |
| *MATH 1101* | 3 | | | | | | |
| *HIST 1000* | 3 | | | | | | |
| Total Credits: | 13 | | | | | | |
| **Minimum Term GPA Required: | 2.50 GPA | | 2.50 GPA | | 2.50 GPA | | 2.50 GPA |
| FAO Use Only: Initials Required | | | | | | | |

\*MUST include subject & course number
\*\*The minimum GPA may be higher as determined by the Academic Advisor.  (i.e. 3.00 GPA for a graduate student)
**Certification Statement:**
*I certify that I have met with my academic advisor to develop an academic plan designed to assist me with meeting the University's standards for Satisfactory Academic Progress. I understand that in order to continue receiving Federal Title IV Financial Aid, I must be meeting the minimum requirements of this academic plan. I further understand that if I fail to meet the terms of this plan, my financial aid **will be suspended** in the subsequent term(s) and I will have to regain financial aid eligibility at my own expense.*


_____          _____   _____
Student Name (Please Print)                              Academic Advisor Name (Please Print)               Date


_____          _____   _____
Student Signature                                              Academic Advisor Signature                            Date

Name:_____          ID#_____

## Student Satisfactory Academic Progress Appeal Statement

Paragraph 1 – List the circumstance(s) that contributed to your academic difficulty.
Paragraph 2 – List changes in your current circumstance that will permit you to focus on your academic performance.
Paragraph 3 – List the steps you will take to improve your academic performance and meet the SAP standards.

**Revised: December 2015**

# FORT VALLEY STATE UNIVERSITY™
## A State and Land-Grant Institution • University System of Georgia

## FINANCIAL AID CONSORTIUM AGREEMENT

This agreement is entered between **Fort Valley State University** (HOME Institution) and **Middle Georgia State University** (HOST Institution) for the purpose of allowing:

**Section I:  To be completed by the Student (Please print):**

Name: _____     FVSU ID:_____     Last 4 of SSN:_____

Permanent Address: _____     City:_____     State: _____     Zip Code:_____

Telephone Number: _____     FVSU Email: _____

Consortium Agreement Requested for the following semester(s): Check all that apply.
[  ]Fall 20 _____          [  ]Spring 20_____          [  ]Summer 20_____

I understand that:

- I must receive approval from Fort Valley State University to be in Transient at the HOST Institution.
- I must be enrolled in a degree or certificate program.
- I must submit this form to the HOST Institution for completion of Section II.
- I may have to pay the HOST Institution out-of-pocket until my aid at FVSU becomes available.
- I am responsible for all charges that may be incurred at the HOST Institution.
- I must notify the FVSU Financial Aid Office if my enrollment changes while attending the HOST Institution (i.e. withdrawals, drop courses, etcetera).
- I must maintain Satisfactory Academic Progress.
- I must submit an official academic transcript at the end of the Consortium Agreement.

By signing this agreement, I understand that Title IV, State, and Institutional rules and regulations will be followed by both the HOME and HOST Institutions.

_____          _____
Student's Signature                                                                          Date

## Section II: To be completed by the HOST Institution's Financial Aid Office

The STUDENT shall be responsible for registering at the HOST INSTITUTION and for payment of all charges and fees incurred at the HOST INSTITUTION and shall be subject to all academic and administrative regulations set forth by the HOST INSTITUTION. Once the required information has been received from the Host Institution and the student has complied with all other regulations, the Home Institution will disburse any financial aid for which he/she may be eligible at the appropriate time.

### Enrollment Period
Classes Start Date: _____

Classes End Date: _____

Number of credit hours for which student is currently enrolled:_____.

HOST Institution's official date to withdraw without penalty is: _____.

### Cost of Attendance
| | | | |
|---|---|---|---|
| Tuition & Fees | _____ | Personal | _____ |
| Room & Board | _____ | Transportation | _____ |
| Books & Supplies | _____ | Miscellaneous | _____ |

**TOTAL:**        ___ _____

The student will _____or will not _____ receive financial aid from the Host Institution for the above term.

Under this Consortium Agreement, the HOST Institution:

- Will not award any financial aid to the student.
- Will notify Fort Valley State University's Financial Aid Office of any changes to the student's enrollment.

It is agreed that the HOME Institution will accept approved course(s) completed at the HOST Institution. The student must receive approval from the HOME Institution (Transient Letter) before taking courses at the HOST Institution. All grades earned for the courses will be accepted by Fort Valley State University and will be included on the student's official transcript.

### AUTHORIZED SIGNATURE (HOST INSTITUTION):

Name: _____        Signature: _____

Title: _____        Date: _____

### AUTHORIZED SIGNATURE (HOME INSTITUTION):

Name: _____        Signature: _____

Title: _____        Date: _____

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| **1. Run before dataload to load any resolved suspended files left unloaded.** | | |
| **RCRTP16** | **Parameter Set: N/A** | |
| | Aid Year | 1516 |
| | Data Source Code | EDE |
| | Load Option for Need Analysis | 1 |
| | Not used at this time | |
| | NSLDS Print Option | Y |
| | Need Analysis Print Option | Y |
| | Recruiting Option | Y |
| | Recalc Need Analysis | |
| | NSLDS Output Application | N |
| | NSLDS Output Selection | |
| | NSLDS Output Creator ID | |
| | ISIR Creation Option | Y |
| | Not used at this time | |
| | Process Indicator | B |
| | Temporary PIDM | |
| | Update Postal Address | Y |
| | Update Telephone Number | Y |
| | Update E-mail Address | Y |
| | Update Social Security No | Y |
| | Name Type Code | |
| | Address Source Code | |
| **2.Process EDE Corrections File** | | |
| **GLBDATA** | **Parameter set: UNLOCK ISIR** | |
| | Selection Identifier 1 | UNLOCK_ISIR |
| | Selection Identifier 2 | UNLOCK_RELOCK_ISIR |
| | New Selection Identifier | |
| | Description for new selection | |

| | |
|---|---|
| Union/Intersection/Minus | |
| Application ID | FINAID |
| Creator ID | CPARKS |
| Detail Execution Report | |
| **ROPPCAT** | **Parameter set: UNLOCK** |
| Aid Year Code | 1516 |
| Category Code | **UNLOCK** |
| Equal or Like | E |
| Audit or Update | U |
| Application Code | FINAID |
| **RORBPST** | **Parameter Set:** |
| Aid Year | 1516 |
| Print Report | Y |
| **RCPTP16** | **Parameter Set: N/A** |
| Aid Year | 1516 |
| Data Source Code | EDE |
| Import File Name | **ENTER CORRECTION ONLY FILE NAME** |
| Generated ID/SSN | G |
| Recalculate Need | N |
| Address Type Code | PR |
| Telephone Type Code | PR |
| Student Email Address Type | EMAL |
| Parent Email Address Type | EMAL |
| Export Error Records | Y |
| Export File Name | IMPORT_ISIRS |
| **RCPMTCH** | **Parameter Set: 1516** |
| Aid Year | 1516 |
| Data Source Code | EDE |
| Generated ID/SSN | G |
| Value for New Students | N (New) |
| Sort Order Indicator | N |
| Common Matching Source | EDE_DATALOAD |
| **RCRTP16** | **Parameter Set: N/A** |

**RCRTP16**

| Field | Value |
|---|---|
| Aid Year | 1516 |
| Data Source Code | EDE |
| Load Option for Need Analysis | 1 |
| Not used at this time | |
| NSLDS Print Option | Y |
| Need Analysis Print Option | Y |
| Recruiting Option | Y |
| Recalc Need Analysis | N |
| NSLDS Output Application | |
| NSLDS Output Selection | |
| NSLDS Output Creator ID | |
| ISIR Creation Option | Y |
| Not used at this time | |
| Process Indicator | B |
| Temporary PIDM | |
| Update Postal Address | Y |
| Update Telephone Number | Y |
| Update E-mail Address | Y |
| Update Social Security No | Y |
| Name Type Code | |
| Address Source Code | |

**RCRSUSP** — Manually resolve Suspended Records on RCRSUSP form.

**RCRTP16** — Parameter Set: N/A

| Field | Value |
|---|---|
| Aid Year | 1516 |
| Data Source Code | EDE |
| Load Option for Need Analysis | 1 |
| Not used at this time | |
| NSLDS Print Option | Y |
| Need Analysis Print Option | Y |
| Recruiting Option | Y |
| Recalc Need Analysis | N |
| NSLDS Output Application | |
| NSLDS Output Selection | |
| NSLDS Output Creator ID | |
| ISIR Creation Option | Y |

| ROPPCAT | | |
|---|---|---|
| | Not used at this time | |
| | Process Indicator | B |
| | Temporary PIDM | |
| | Update Postal Address | Y |
| | Update Telephone Number | Y |
| | Update E-mail Address | Y |
| | Update Social Security No | Y |
| | Name Type Code | |
| | Address Source Code | |
| | **Parameter set: RELOCK_ISIR** | |
| | Aid Year Code | 1516 |
| | Category Code | **RELOCK** |
| | Equal or Like | E |
| | Audit or Update | U |
| | Application Code | FINAID |

| RORBPST | | |
|---|---|---|
| | **Parameter Set: 1516** | |
| | Aid Year | 1516 |
| | Print Report | Y |

**3. Load all Remaining Non-Correction ISIR files**

| RCPTP16 | | |
|---|---|---|
| | **Parameter Set: N/A** | |
| | Aid Year | 1516 |
| | Data Source Code | EDE |
| | Import File Name | **ENTER NON-CORRECTION ONLY FILE NAME** |
| | Generated ID/SSN | G |
| | Recalculate Need | N |
| | Address Type Code | PR |
| | Telephone Type Code | PR |
| | Student Email Address Type | EMAL |
| | Parent Email Address Type | EMAL |
| | Export Error Records | Y |
| | Export File Name | IMPORT_ISIRS |

| RCPMTCH | | |
|---|---|---|
| | **Parameter Set: 1516** | |

4

**RCRTP16**

| | |
|---|---|
| Aid Year | 1516 |
| Data Source Code | EDE |
| Generated ID/SSN | G |
| Value for New Students | N (New) |
| Sort Order Indicator | N |
| Common Matching Source | EDE_DATALOAD |

**RCRTP16** — **Parameter Set: N/A**

| | |
|---|---|
| Aid Year | 1516 |
| Data Source Code | EDE |
| Load Option for Need Analysis | 1 |
| Not used at this time | |
| NSLDS Print Option | Y |
| Need Analysis Print Option | Y |
| Recruiting Option | Y |
| Recalc Need Analysis | N |
| NSLDS Output Application | |
| NSLDS Output Selection | |
| NSLDS Output Creator ID | |
| ISIR Creation Option | Y |
| Not used at this time | |
| Process Indicator | B |
| Temporary PIDM | |
| Update Postal Address | Y |
| Update Telephone Number | Y |
| Update E-mail Address | Y |
| Update Social Security No | Y |
| Name Type Code | |
| Address Source Code | |

**RCRSUSP** — **Parameter Set: N/A**

| | |
|---|---|
| Manually resolve Suspended Records on RCRSUSP form. | |

**RCRTP16** — **Parameter Set: N/A**

| | |
|---|---|
| Aid Year | 1516 |
| Data Source Code | EDE |
| Load Option for Need Analysis | 1 |
| Not used at this time | |
| NSLDS Print Option | Y |

| | |
|---|---|
| Need Analysis Print Option | Y |
| Recruiting Option | Y |
| Recalc Need Analysis | N |
| NSLDS Output Application | |
| NSLDS Output Selection | |
| NSLDS Output Creator ID | |
| ISIR Creation Option | Y |
| Not used at this time | |
| Process Indicator | B |
| Temporary PIDM | |
| Update Postal Address | Y |
| Update Telephone Number | Y |
| Update E-mail Address | Y |
| Update Social Security No | Y |
| Name Type Code | |
| Address Source Code | |

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| **STEP 1** | Reviews all records, new and existing, and assigns/reassigns tracking group. | |
| **RORGRPS** | Aid Year Code | 1516 |
| | Applicant ID | B |
| Must finish before going to Step 2 | Process Indicator | |
| **TRK_GRP** | Term Code | |
| **ParaSet** | Group Type Indicator | T |
| | Use All Applicants Indicator | Y |
| | Application ID | |
| | Selection ID | |
| | Creator ID | |
| | User ID | |
| | Period | |
| | Action Indicator | A |
| | Simulation Print Option | N |
| **STEP 2** | Next popsels find specific criteria and you batch post a document or update the status of a | |
| **GLBDATA** | Selection Identifier 1 | BP_CFLAG |
| **Para.Set** | Selection Identifier 2 | BP_CFLAG |
| **BP_CFLAG** | New Selection Identifier | |
| | Description for new selection | |

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | GHARRIS |
| | Detail Execution Report | |
| | DYNAMIC - DATE | enter last dataload date |
| | DYNAMIC - YEAR | 1516 |
| **GLBDATA** | | |
| **Para.Set** | | |
| DEP_UNACC_YOUTH | Selection Identifier 1 | DEP_UNACC_YOUTH_SCHL |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Union/Intersection/Minus | |
| | Description for new selection | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |
| **GLBDATA** | | |
| **ParaSet** | | |
| DEP_LEGAL_DEP | Selection Identifier 1 | |
| | Selection Identifier 2 | DEP_HAVE_LEGAL_DEP |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |
| **GLBDATA** | Selection Identifier 1 | DEP_ACTIVE_DUTY |
| | Selection Identifier 2 | |

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| **ParaSet** | | |
| DEP_ACTIVE_DUTY | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |
| **GLBDATA** | Selection Identifier 1 | DEP_DEGREE |
| | Selection Identifier 2 | |
| **ParaSet** | | |
| DEP_DEGREE | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |
| **GLBDATA** | Selection Identifier 1 | DEP_EMAN |
| | Selection Identifier 2 | |
| **ParaSet** | | |
| DEP_EMAN | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |

| Job Name | Name for Job Prompt(s) (also known as Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| **GLBDATA** | | |
| **ParaSet** **DEP_HOMELESS** | Selection Identifier 1 | DEP_HOMELESS |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |
| **GLBDATA** | | |
| **ParaSet** **DEP_UNACC_HUD** | Selection Identifier 1 | DEP_UNACC_HUD |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | |
| **GLBDATA** | | |
| **ParaSet** **DEP_LEGAL_GUARD** | Selection Identifier 1 | DEP_LEGAL_GUARDIAN |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |

| Job Name | Name for Job Prompt(s) (also known as Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| GLBDATA | DYNAMIC - dataload_date | enter last dataload date |
| ParaSet | | |
| DEP_VET | Selection Identifier 1 | DEP_VET |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |
| GLBDATA | DYNAMIC - dataload_date | enter last dataload date |
| ParaSet | | |
| DEP_WARD | Selection Identifier 1 | DEP_WARD |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - dataload_date | enter last dataload date |
| GLBDATA | DYNAMIC - dataload_date | enter last dataload date |
| ParaSet | | |
| CHILD_SPT_PAID | Selection Identifier 1 | CHILD_SPT_PAID |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |

FA_0809_DATALOAD rev2 Input Values TAB

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - tracking_docume | CHLDSU |
| GLBDATA | Selection Identifier 1 | SNAP_RECEIVED |
| ParaSet | Selection Identifier 2 | |
| SNAP_RECEIVED | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| | DYNAMIC - tracking_docume | SNAP16 |
| GLBDATA | Selection Identifier 1 | IRS_DRT_STUDENT |
| ParaSet | Selection Identifier 2 | |
| IRS_DRT_STUDENT | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - AIDY_CODE | 1516 |
| GLBDATA | Selection Identifier 1 | IRS_DRT_PARENT |
| ParaSet | Selection Identifier 2 | |
| IRS_DRT_PARENT | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |

FA_0809_DATALOAD rev2 Input Values TAB

| Job Name | Name for Job Prompt(s) (also known as Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| GLBDATA | | |
| | DYNAMIC - AIDY_CODE | 1516 |
| | Detail Execution Report | |
| | Creator ID of Selection ID | CPARKS |
| ParaSet ADMIT_1516 | | |
| | New Selection Identifier | ADMIT_1516 |
| | Selection Identifier 2 | |
| | Selection Identifier 1 | |
| GLBDATA | | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| ParaSet PAR_CHNG_IRSDRT | | |
| | Description for new selection | |
| | New Selection Identifier | PARENT_CHANGED_IRS_DRT |
| | Selection Identifier 2 | |
| | Selection Identifier 1 | |
| GLBDATA | | |
| | Detail Execution Report | |
| | Creator ID of Selection ID | CPARKS |
| | Application Code | FINAID |
| | Union/Intersection/Minus | |
| | Detail Execution Report | |
| | DYNAMIC - aidy_code | 1516 |
| ParaSet STU_CHNG_IRSDRT | | |
| | Description for new selection | |
| | New Selection Identifier | STUDENT_CHANGED_IRS_DRT |
| | Selection Identifier 2 | |
| | Selection Identifier 1 | |
| GLBDATA | | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |

| Job Name | | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI-entering the word SYSDATE will use the current date) |
|---|---|---|---|
| | | DYNAMIC - aidy_code | 1516 |
| ROPPCAT | | Aid Year Code | 1516 |
| This job looks at RORPOST and removes existing checked indicators on each record then | | | |
| | | Category Code | NEW_TRACK |
| ParaSet | | Equal or Like | E |
| NEW_TRACK | | Audit or Update | U |
| | | Application Code | FINAID |
| Batch Post Job | | | |
| RORBPST | | AID YEAR | 1516 |
| | | PRINT REPORT | Y |
| STEP 3 | | | |
| Unlock ISIR RECORDS SO THEY CAN BE UPDATED WITH NEW YEAR IN COLLEGE, AS NE | | | |
| GLBDATA | | Parameter set: UNLOCK_ISIR | |
| | | Selection Identifier 1 | UNLOCK_ISIR |
| | | Selection Identifier 2 | UNLOCK_RELOCK_ISIR |
| | | New Selection Identifier | |
| | | Description for new selection | |
| | | Union/Intersection/Minus | |

| Job Name | Name for Job Prompt(s) (also known Parameters) | | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|---|
| | Application ID | | FINAID |
| | Creator ID | | CPARKS |
| ROPPCAT | Detail Execution Report | | |
| | Parameter set: | | UNLOCK |
| | Aid Year Code | | 1516 |
| | Category Code | | UNLOCK |
| | Equal or Like | | E |
| | Audit or Update | | U |
| | Application Code | | FINAID |
| RORBPST | Parameter Set: | | |
| | Aid Year | | 1516 |
| | Print Report | | Y |
| **Next popsels find where student FA class does not match Student side class. Batch post \** | | | |
| GLBDATA | Selection Identifier 1 | | YIC_FR |
| | Selection Identifier 2 | | |
| ParaSet | New Selection Identifier | | |
| YIC_FR | Description for new selection | | |
| | Union/Intersection/Minus | | |
| | Application Code | | FINAID |
| | Creator ID of Selection ID | | CPARKS |
| | Detail Execution Report | | |

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| RUN THIS TO FIND ALL NEW/TRANSFER STUDENTS THAT ARE READY TO BE VERIFI THIS WHEN YOU START VERIFING ALL STUDENTS AND NOT JUST NEW/T | | |
| GLBDATA | Selection Identifier 1 | READY_TO_VERIFY_NEW_STUDENTS |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| Para.Set | Description for new selection | |
| RDY_VER_NEW_STU | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection I | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy | 1516 |
| BEGIN RUNNING WHEN YOU WANT TO BEGIN VERIFYING EVERYONE THAT IS REA NEW/TRANSFER | | |
| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
| GLBDATA | Selection Identifier 1 | READY_TO_VERIFY |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| Para.Set | Description for new selection | |
| RDY_VERIFY_STU | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection I | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - aidy | 1516 |

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| IED. STOP RUNNING RANSFER |
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| Process EDE Corrections | | |
|---|---|---|
| **RLRLOGG Job** | **Parameter set:** | |
| | 1 | Aid Year code for logging |
| | | |
| **REACORR- View corrections** | Optional: This form is to view logged records ready to The REBCDxx job will extract these records and creat | |
| | | |
| **REBCD16 - Job** | This process creates the **CORR16IN.DAT** file in the B Directory. Move this file to a shared folder so that you | |
| | Parameter Set: (saved with no name, aidyr job) | |
| | 1 | Aid Year Code for 2015-2016 |
| | 2 | Resend Prev. Processed Records |
| | 3 | Resend for prior date |
| | 4 | Application ID |
| | 5 | Selection ID |
| | 6 | Creator ID |
| | 7 | User ID |
| | 8 | Resend for Prior Date/Hour |
| | 9 | Resend for Prior Date/Minute |
| | 10 | Send with Discrepant Trans #s |
| | 11 | Processing Type |
| | 12 | Federal School Code |
| | | |
| **RERCRCR - Job Report** | Parameter: 1516 | |
| | 1 | Aid Year Code |
| | 2 | Activity Date |
| | 3 | Activity Date/Hour |
| | 4 | Activity Date/Minute |
| **RPIBATC -View batches** | | Review batch ID that was extracted for corrections. |

| | |
|---|---|
| 1516 | This process will log all corrections made since the last time RORLOGG was run. |
| | |
| be sent to CPS.<br>e a corr16n.dat file. | Review logged correction records on this form, deleting before exporting, if needed. |
| | |
| anner GurJobs<br>u may move it to | View Log and Lis to verify successful completion of corr16in.dat file. |
| 1516<br>N | Move file using Fillzilla from Banner to 1516 Processing Documents under F Drive finaid (move from right side to left side) 'click and drag'. Rename file corr16in.dat then go to Ed Connect and select the correction file and transmit. |
| Y<br>A<br>001566 | |
| | |
| 1516<br>Date of corrections were exported | **Optionally** print report of corrections by batch for aid year, date, hour, and/or minute. Report   lists EDE corrections that were created on a specific date |
| | |

| STEP 1 - Assign Budget Groups for NEW STUDENTS | | |
|---|---|---|
| **GLBDATA** | Selection Identifier 1 | READY_BUDGET_NEW_STUDENTS |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| RDY_BUD_NEWSTU | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - YEAR | 1516 |
| | | |
| **RORGRPS** | Aid Year Code | *1516* |
| | Group Type Indicator | B |
| **ParaSet** | Term Code | |
| 1516BUD_GRP_NEW | Process Indicator | B |
| | Applicant ID | |
| | Use All Applicants Indicator | N |
| | Application ID | FINAID |
| | Selection ID | READY_BUDGET_NEW_STUDENTS |
| | Creator ID | CPARKS |
| | User ID | CPARKS |
| | Period | |
| | Action Indicator | A |
| | Simulation Print Option | N |
| | | |
| | | |
| **RNPFM16** | Aid Year | 1516 |
| | Process Indicator | B |
| **Parameter - save no** | Applicant ID | |
| | Application Code | |
| | Selection ID | |
| **Calculate need for every record in wait status** | Creator ID | |
| | User ID | |
| | Report Options | X |
| | | |
| | | |
| STEP 2 - Assign Packaging Groups - NEW STUDENTS | | |
| **GLBDATA** | Selection Identifier 1 | READY_ASSIGN_PKGRP_NEWSTUDENTS |
| | Selection Identifier 2 | |
| **ParaSet** | New Selection Identifier | |
| RDY_PKGRP_NEW | Description for new selection | |

| | | |
|---|---|---|
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - YEAR | 1516 |
| | | |
| **RORGRPS** | Aid Year Code | *1516* |
| | Group Type Indicator | P |
| **ParaSet** | Term Code | |
| 1516_PGRP_NEW | Process Indicator | B |
| | Applicant ID | |
| | Use All Applicants Indicator | N |
| | Application ID | FINAID |
| | Selection ID | READY_ASSIGN_PKGRP_NEWSTUDENTS |
| | Creator ID | CPARKS |
| | User ID | CPARKS |
| | Period | |
| | Action Indicator | A |
| | Simulation Print Option | N |
| | | |
| **STEP 3 - Run automatic packaging to award aid** | | |
| **GLBDATA** | Selection Identifier 1 | READY_PACKAGE_NEW_STUDENTS |
| | Selection Identifier 2 | |
| **ParaSet** | New Selection Identifier | |
| RDY_PKG_NEWSTU | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - YEAR | 1516 |
| | | |
| **RPEPCKG** | Aid Year | 1516 |
| | Process Indicator | B |
| ParaSet | Action Indicator | A |
| 1516_PKG_NEW_ST | Applicant ID | |
| | Packaging Group Code | |
| | Application Code | FINAID |
| | Selection ID | READY_PACKAGE_NEW_STUDENTS |
| | Creator ID | CPARKS |
| | User ID | CPARKS |
| | Ignore Package Complete Da | N |
| | Print Report | B |
| | Ignore Tracking Requirement | N |
| | Award Exhausted Fund Optio | N |

| | Calculate Pell Award | Y |
|---|---|---|
| | | |
| **STEP 5 - Locking ISIRs** | Locking ISIR After Awards | |
| | | |
| **GLBDATA** | Selection Identifier 1 | **LOCK_ISIR_AFTER_AWARDED** |
| | Selection Identifier 2 | |
| **ParaSet** | New Selection Identifier | |
| **ISIR_LOCK_2** | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | **FINAID** |
| | Creator ID of Selection ID | **CPARKS** |
| | Detail Execution Report | |
| | DYNAMIC - AIDY_CODE | 1516 |
| | | |
| **ROPPCAT** | Parameter set:  LOCK_ISIR_AWARD | |
| | Aid Year Code | 1516 |
| | Category Code | **LOCISIRAWD** |
| | Equal or Like | E |
| | Audit or Update | U |
| | Application Code | **FINAID** |
| | | |
| **RORBPST** | Parameter set: | |
| | Aid Year Code | 1516 |
| | Category Code | Y |
| | | |
| **STEP 6 - Running AWARD emails** | WHEN TESTING, YOU MUST CHANGE THE | |
| **GLBDATA** | Selection Identifier 1 | **AWARD_EMAIL** |
| | Selection Identifier 2 | |
| **ParaSet** | New Selection Identifier | |
| **AWARD_EMAIL** | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | **FINAID** |
| | Creator ID of Selection ID | **CPARKS** |
| | Detail Execution Report | |
| | DYNAMIC - AIDY_CODE | 1516 |
| | | |
| **ROREMAL** | Aid Year Code | 1516 |
| | Email Letter Code | **FA_AWARD_EMAIL** |
| | Email Address Type Preference | 1EMSC |
| **ParaSet** | Student ID | |
| **AWARD_EMAIL** | Application ID | **FINAID** |
| | Selection ID | **AWARD_EMAIL** |
| | Creator ID | **CPARKS** |
| | User ID | **CPARKS** |
| | Audit/Update Mode | U |

|  |  | Email Subject Text | Financial Aid Award Notice |
|---|---|---|---|
|  |  | FROM Email Address | financialaid@fvsu.edu |
|  |  | Email Sender's Name | Office of Financial Aid |
|  |  | Mail Host | Fvsuexch0.fv.fvsu.edu |
|  |  | Mail Host Port Number | 25 |
|  |  | Content-Type | text/html;charset=ulf-8 |
|  |  | Extra Line Feed | N |
|  |  | Use only defined email types | Y |
|  |  |  |  |
|  |  |  |  |
| **RLRLETR** |  | Selection ID | AWARD_EMAIL |
|  |  | Application Code | FINAID |
| **ParaSet** |  | Creator ID | CPARKS |
| 1516_AWD_FLAGS |  | Aid Year Code | 1516 |
|  |  | Award or Tracking Indicator | A |
|  |  |  |  |
|  |  | User ID | CPARKS |
|  |  |  |  |
|  |  |  |  |

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values (FYI- entering the word SYSDATE will use the current date) |
|---|---|---|
| 1. Assign Budget Groups ALL STUDENTS (INCLUDING NEW) | | |
| GLBDATA | Selection Identifier 1 | READY_TO_BUDGET |
| | Selection Identifier 2 | |
| ParaSet | New Selection Identifier | |
| READY_TO_BUDGET | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - YEAR | 1516 |
| | | |
| RORGRPS | Aid Year Code | 1516 |
| | Group Type Indicator | B |
| ParaSet | Term Code | |
| 1516BUD_GRP | Process Indicator | B |
| | Applicant ID | |
| | Use All Applicants Indicator | N |
| | Application ID | FINAID |
| | Selection ID | READY_TO_BUDGET |
| | Creator ID | CPARKS |
| | User ID | CPARKS |
| | Period | |
| | Action Indicator | A |
| | Simulation Print Option | N |
| | | |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - YEAR | 1516 |
| | | |
| RNPFM16 | Aid Year | 1516 |
| | Process Indicator | B |
| Parameter - none | Applicant ID | |
| | Application Code | |
| | Selection ID | |
| Calculate need for every record in wait status | Creator ID | |
| | User ID | |
| | Report Options | X |

| | | |
|---|---|---|
| **GLBDATA** | Selection Identifier 1 | READY_ASSIGN_PKG_GRP |
| | Selection Identifier 2 | |
| **ParaSet** | New Selection Identifier | |
| READY_ASSIGN | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - YEAR | 1516 |
| | | |
| **RORGRPS** | Aid Year Code | *1516* |
| | Group Type Indicator | P |
| **ParaSet** | Term Code | |
| 1516_PGRP_ALL | Process Indicator | B |
| | Applicant ID | |
| | Use All Applicants Indicator | N |
| | Application ID | FINAID |
| | Selection ID | READY_ASSIGN_PKG_GRP |
| | Creator ID | CPARKS |
| | User ID | CPARKS |
| | Period | |
| | Action Indicator | A |
| | Simulation Print Option | N |
| | | |
| **STEP 3 - Run automatic packaging to award aid** | | |
| **GLBDATA** | Selection Identifier 1 | READY_TO_PACKAGE |
| | Selection Identifier 2 | |
| **ParaSet** | New Selection Identifier | |
| READY_PACKAGE | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - YEAR | 1516 |
| | | |
| **RPEPCKG** | Aid Year | 1516 |
| | Process Indicator | B |
| **ParaSet** | Action Indicator | A |
| 1516_PKG_ALL | Applicant ID | |
| | Packaging Group Code | |
| | Application Code | FINAID |
| | Selection ID | READY_TO_PACKAGE |
| | Creator ID | CPARKS |
| | User ID | CPARKS |
| | Ignore Package Complete Date | N |

| | Print Report | B |
|---|---|---|
| | Ignore Tracking Requirements | N |
| | Award Exhausted Fund Option | N |
| | Calculate Pell Award | Y |
| **STEP 5 - Running AWARD emails** | WHEN TESTING, YOU <u>MUST</u> CHANGE THE EAMIL ADDRESS(S) ON GOAEMAL. IF YOU DO NOT THEN THESE TESTING EMAILS | |
| **GLBDATA** | Selection Identifier 1 | **AWARD_EMAIL** |
| | Selection Identifier 2 | |
| **ParaSet** | New Selection Identifier | |
| **AWARD_EMAIL** | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | FINAID |
| | Creator ID of Selection ID | CPARKS |
| | Detail Execution Report | |
| | DYNAMIC - AIDY_CODE | 1516 |
| | | |
| **ROREMAL** | **Aid Year Code** | 1516 |
| | **Email Letter Code** | **FA_AWARD_EMAIL** |
| | **Email Address Type Preference** | 1EMSC |
| **ParaSet** | **Student ID** | |
| **AWARD_EMAIL** | **Application ID** | FINAID |
| | **Selection ID** | **AWARD_EMAIL** |
| | **Creator ID** | CPARKS |
| | **User ID** | CPARKS |
| | **Audit/Update Mode** | U |
| | **Email Subject Text** | Financial Aid Award Notice |
| | **FROM Email Address** | financialaid@fvsu.edu |
| | **Email Sender's Name** | Office of Financial Aid |
| | **Mail Host** | Fvsuexch0.fv.fvsu.edu |
| | **Mail Host Port Number** | 25 |
| | **Content-Type** | text/html;charset=ulf-8 |
| | **Extra Line Feed** | N |
| | **Use only defined email types** | Y |
| | | |
| **RLRLETR** | **Selection ID** | **AWARD_EMAIL** |
| | **Application Code** | FINAID |
| **ParaSet** | **Creator ID** | CPARKS |
| **1516_AWD_FLAGS** | **Aid Year Code** | 1516 |
| | **Award or Tracking Indicator** | A |
| | **User ID** | CPARKS |
| | | |
| | | |

| Job Name | Name for Job Prompt(s) (also known Parameters) | Values- Enter your values |
|---|---|---|

## Run PopSel to find records to add to Transfer Monitoring

| | | |
|---|---|---|
| **GLBDATA** | Selection Identifier 1 | |
| | Selection Identifier 2 | |
| | New Selection Identifier | |
| | Description for new selection | |
| | Union/Intersection/Minus | |
| | Application Code | **FINAID** |
| | Creator ID of Selection ID | **CPARKS** |
| | Detail Execution Report | |
| | DYNAMIC - AIDY_CODE | **1516** |

## Create Transfer Monitoring records using popsel above

| | | |
|---|---|---|
| **RNRTMAC** | Aid Year Code | |
| | Application ID | |
| | Selection ID | |
| | Creator ID | **CPARKS** |
| | User ID | |
| | School Code | |
| | Enrollment Begin Date | |
| | Remove from Monitoring | |
| | Print Report | |
| | Use Class Start Date | |
| | *Request Type to Create* | |
| | | |
| | | |

## Create the TRNINFIN file to submit for monitoring

| | | |
|---|---|---|
| **RNRTMNE** | | |
| | Aid Year Code | 1516 |
| | *School OPEID and Branch ID* | Not required |
| | Hold Code | TM |
| | Sort Order | N - Name |
| | Application ID | Blank |
| | Selection ID | Blank |
| | Creator ID | Blank |
| | User ID | Blank |
| | Resend TM Inform File Batch ID | Blank |
| | *Request Type to Extract* | enter type of records (TSM, FAH or Both) |

| EXTERNAL | FTP the TRNINFIN file from the Banner Directory to your PC and transmit to DOE via EdConnect. | |
|---|---|---|

## Import the TRNRINFOP/TRLRTOP file(s) from EdConnect into Banner

| EXTERNAL | FTP the TRNRINFOP acknowledgement file and/or TRLRTOP Alert File from your PC to the Banner Data Load Directory. | |
|---|---|---|
| RNRTMNI | Acknowledgement/Alert File | trninfop or tralrtop |
| | Print Report Option (Y/N_ | Y - Yes |
| | NSLDS Output Application ID | Blank |
| | NSLDS Output Selection ID | Blank |
| | NSLDS Output Creator ID | Blank |
| | NSLDS Output User ID | Blank |
| | *Load FAH Record as Current* | Y |

| Comments |
| --- |
| |

| |
| --- |
| |
| |
| |
| |
| |
| |
| |
| |

| |
| --- |
| The RNRTMAC process will produce a .lis and .log files. |
| |
| |
| |
| |
| |
| |
| |
| *enter type of records (TSM, FAH or Both)* |
| |
| |

| |
| --- |
| This process creates the federally required 7-day TM hold record on ROAHOLD with parameter 3 value |
| The RNRTMNE process will produce a .lis and .log files. |
| |
| |
| |
| |
| |
| |
| |

|  |
| --- |

| Import the files and review any alerts on RNATMNT or RNASLxx |
| --- |
|  |
|  |
|  |
|  |
|  |

| Job Name | Parameters | Values | Comments |
|----------|-----------|--------|----------|
| | | | |
| | | **Process COD Grants** | |
| | | | |
| **Create PELL/TEACH Origination Records** | | | |
| **REROR16** | Aid Year | 1516 | Create Pell and TEACH Origination Records |
| | Create Pell Originations | Y | |
| | do not use | | |
| | do not use | | |
| | Create origination award stat | A | |
| | Proc data request records | Y | |
| | Application ID | | |
| | Selection ID | | |
| | Creator ID | | |
| | User Id | | |
| | Create TEACH Originations | Y | |
| | | | |
| | | **Process Direct Loans** | |
| | | | |
| **Update student program information as seen on RPASSUI, to send to COD** | | | |
| **RPPSPGM** | Aid Year Code | 1516 | This job runs to update the |
| | Create/Audit Option | C | program information required by |
| | Fund Code(s) | DLSU | COD |
| | Fund Code(s) | DLUN | |
| | Fund Code(s) | DLGUN | You can view this on the RPASSUI |
| | Fund Code(s) | GPLUS | Form |
| | Fund Code(s) | PLUS | |
| | Application Code | | |
| | Selection ID | | |
| | Creator ID | | |
| | User ID | | |
| | Sort Option | N | |
| | | | |
| **Create Direct Loan Origination Records** | | | |
| **RLPDLOC** | | | Creation origination records |
| | | | |
| | Aid Year Code | 1516 | Origination Records are viewed and changes made on RLADLOR Direct Loan Origination Form |
| | Fund Code | DLSU | |
| | Fund Code | DLUN | |
| | Fund Code | DLGUN | |
| | Fund Code | PLUS | |

| | | | |
|---|---|---|---|
| | Fund Code | GPLUS | |
| | Default Origination Status | R | |
| | Direct Loan School Code | G01566 | |
| | Default Lock Indicator | N | |
| | Permanent Address Type | 1MA | |
| | Permanent Address Type | 2PR | |
| | Local Address Type | | |
| | Application Code | | |
| | Selection ID | | |
| | Creator ID | | |
| | User ID | | |
| | Student ID | | |
| | | | |

| | | | |
|---|---|---|---|
| **REREX16 - Job** | | | Export all Loans out of Banner and send to COD |
| | | | |
| | Aid Year | 1516 | Review .log file for process to view extraction errors |
| | DL Fund Code | DLSU | |
| | DL Fund Code | DLUN | • craaxxin_jobsubnumber.xml: (Pell/Direct Loan/TEACH - any combination of two or more) |
| | DL Fund Code | DLGUN | • crpgxxin_jobsubnumber.xml: (Pell only) |
| | DL Fund Code | PLUS | • crdlxxin_jobsubnumber.xml: (Direct Loan only) |
| | DL Fund Code | GPLUS | • crthxxin_jobsubnumber.xml (TEACH only) |
| | Extract Pell Funds | Y | |
| | DL Records to extract | B | |
| | Not Used at this time | | |
| | Not Used at this time | | |
| | Not Used at this time | | |
| | Attending School ID | 71265805 | |
| | Response Type | F | |
| | Resend Document ID | | |
| | Application Code | | |
| | Selection ID | | |
| | Creator ID | | |
| | User ID | | |
| | Print RERIMEX report | Y | |
| | Update Student Identifier | Y | |

| | | | |
|---|---|---|---|
| | Extract TEACH Funds | Y | |
| | DL Origination Status | R | |
| **Export File from Banner to EdConnect/COD** | | | |
| **External process** | FTP this file from the Banner Directory to your PC and transmit through EdConnect | | craaxxin_jobsubnumber.xml: (Pell/Direct Loan/TEACH - any combination of two or more) |
| | | | • crpgxxin_jobsubnumber.xml: (Pell only) |
| | | | • crdlxxin_jobsubnumber.xml: (Direct Loan only) |
| | | | • crthxxin_jobsubnumber.xml (TEACH only) |
| **Upload COD Files from EdConnect/COD files to Banner** | | | |
| **External process** | Retrieve file(s) from EdConnect import into Banner | | |
| | | | |
| | | | |
| **Import Loan Origination-Response File** | | | |
| | | | |
| **RERIM16** | | | Report output RERIMEX |
| | Aid Year for 2015-2016 | 1516 | Review RERIMEX.lis report for a listing of students/loans extracted and fix errors |
| | XML import document filename | | |
| | Print RERIMEX report | B | REAUCOD - review any unmatched records and resolve any issues |
| | TEACH ATS Requirement | ATS | |
| | ATS Satisfied status | S | REACODD - review exports and imports in Banner form for xml files |
| | Not used at this time | | |
| | Accepted Loan Status | PROC | |
| | Import Unmatched MPNs? | Y | |
| | | | |
| **Process FlatFiles** | | | |

| Upload Flat Files (pgra, pgsa, pgmr, pgrc, pgyr, thmr, atsdisop, exthffop) | | | |
|---|---|---|---|
| RERFI16 | Grant filename with extension | | **Pell Grant Message Classes** |
| | Accepted Records Print Option | | • PGRAxxOP - Pell Data Request Response |
| | TEACH Exit Requirement Exit Satisfied Status | EXIT | • PGASxxOP - Pell Electronic Statement of Account (ESOA) |
| | Exit Satisfied Status | S | • PGMRxxOP - Pell Multiple Reporting Record (MRR) |
| | Aid Year code | 1516 | • PGRCxxOP - Pell Reconciliation Report |
| | | | • PGYRxxOP - Pell Year-to-Date Record |
| | | | **TEACH Grant Message Classes** |
| | | | • THMRxxOP - TEACH Multiple Reporting Record (M |
| | | | |
| **Monitor COD Grants** | | | |
| RERCD16 - Job | Aid Year Code | | The COD Print Process prints a report of Pell or Direct Loan origination and/or disbursement Document IDs which have been sent to COD. |
| RERFI16 - Job | Fund Type | | |
| | Fund Code | | |
| | Origination Report | | |
| | Origination Document ID | | |
| | Disbursement Report | | |
| | Disbursement Document ID | | |
| | Beginning Date Sent | | |
| | Ending Date Sent | | |
| | Application ID | | |
| | Selection ID | | |
| | Creator ID | | |
| | User ID | | |
| | | | |
| RERGRNT Job Report | Aid Year Code | | The Grant COD Miscellaneous Report lets you access COD data stored in the database. This can be used to help identify exception processing requirements |

| | | | |
|---|---|---|---|
| | Grant Type | | |
| | Select Verif. Code = "W" | | |
| | Select system Gen Disbs. | | |
| | Select COD Grant disb Locked | | |
| | Select MRR Record Types | | |
| | Select AP No Disb Ack | | |
| | Select AP No Charge Accept | | |
| | Select all rejected Orig. recs | | |
| | Select all rejected disb. Recs | | |
| | Year to Date Reporting | | |
| | Application ID | | |
| | Selection ID | | |
| | Creator ID | | |
| | User ID | | |
| | | | |
| REREXIM - Job Report | Aid Year Code | | The COD Import/Export Report enables you to review XML records extracted from the Banner database for transmission to COD and to review COD responses that have been imported into the Banner database.(Replaces RERIMEX) 8.23 |
| | Records to report | | |
| | Document ID | | |
| | Date Selection Type | | |
| | Beginning Date | | |
| | Ending Date | | |
| | Identifier Compare Report? | | |
| | TEACH ATS Requirement | | |

| |
|---|
| Note: The following is not a complete list, other file types maybe added at other times. Check new Financial Aid Releases |
| **Pell file names - imports from EdConnect into Banner using RERIMxx** |
| • CRRCxxOP — COD Document receipt file sent from the COD System to the school in response to the CRPGxxIN message class. |
| • CRPGxxOP — Pell Origination and Disbursement records sent in response to the CRPGxxIN message class. |
| • CRNDxxOP — COD System-Generated Pell Negative Disbursement records |
| **TEACH imports** |
| • CRTHxxOP — COD Document receipt file, Origination and Disbursement files sent from the COD System to the school in response to the<br>CRTHxxIN message class. |
| • CRATxxOP — COD System-Generated TEACH ATS (Agreement to Serve) records. |
| • CRACxxOP — COD System-Generated TEACH Grant Counseling Acknowledgement records. |
| **Direct Loan imports** |
| • CRRCxxOP — COD Document receipt file sent from the COD System to the school in response to the CRDLxxIN message class. |

| |
|---|
| • CRDLxxOP — Direct Loan Origination, Origination Change, and Disbursement records sent in response to the CRDLxxIN message |
| class. |
| • COD System-Generated Records |
| • CRPNxxOP — Promissory Note Records. |
| • CRCSxxOP — Credit Decision |
| • CRPSxxOP — Payment to Servicer Records. |
| • CRBNxxOP — Booking Notification Records. |
| • CRSPxxOP — DL PLUS Application Acknowledgement Records. |
| |
| **Combined Pell, TEACH, and Direct Loan imports** |
| • CRECMYOP — Entrance Counseling Records. |
| • CRRCxxOP — COD Document receipt file sent from the COD System to the school in response to the CRAAxxIN message class. |
| • CRAAxxOP — Pell Origination and Disbursement records/TEACH Origination and Disbursement records//Direct Loan Origination, |
| Origination Change, and Disbursement records in response to the CRAAxxIN message class. |

# TD Client Automation
## Ellucian Higher Education

Innovate 2014
The Art of the Possible™

Dennis Strenkowski

# The Art of the Possible

Automating the transfer of files to and from the Department of Education

- Download and concatenate message classes for the ISIR Data Load
  - Download and Process Loan and Grant XML files
    - Create and upload Corrections files

# 3    What is the TD Client?

TDClient is the client software used to send and receive FTP (File Transfer Protocol) Title IV data transmissions securely over the Internet using FIPS 140-2 Advanced Encryption Standard (AES).

## Requirements

Port 26581 needs to be open in your firewall to allow outbound TCP/IP traffic.

Name:    SAIGMAILBOX.ED.GOV

IP Address:   165.224.210.13

## Resources

You can request the TDClient software by contacting CPS/SAIG Technical Support at 800/330-5947 or by email at CPSSAIG@ed.gov.

https://www.fsadownload.ed.gov/softedconnect.htm

# 4 What is the TD Client?

# What is the TD Client?

| Supported Platforms for TDClient | | | | |
|---|---|---|---|---|
| **Windows** | **Linux** | **Solaris** | **HP-UX PA-RISC** | **AIX** |
| • Vista<br>• Win7<br>• Server 2003<br>• Server 2008 | • RedHat ES3x<br>• RedHat ES4x<br>• RedHat ES5x<br>• RedHat ES6x<br>• Suse ESx<br>• Ubuntu<br>• CentOS | • 9 Sparc<br>• 10 Sparc<br>• 11 Sparc | • 11i<br>  v2(11.23)<br>• 11i<br>  v3(11.31) | • 6.1<br>• 7.1 |

# Benefits

- Eliminate the manual process and reduce errors
  - The processing of the files tends to backup because it is such a manual process

# Benefits

- More secure and efficient by downloading files directly to the server
  - Files will be more secure on the server than your desktop
  - Less copying and moving of the files
  - No worrying if right files were copied or concatenated

# Benefits

- Spend less time processing and more time validating
  - Get the log files emailed to you to check

# ED Connect versus TD Client

- ED Connect is the interface that most Ellucian customers are familiar with using for the manual uploading and downloading of files. But since it uses a windows GUI, it cannot be automated.

# ED Connect versus TD Client

- TD Client is the command line interface that can be used to automate/script the uploading and downloading of files.  A Login object can be used to store the TD Client credentials.



- ## Get Class

```
tdclientc "network=%net_connect%" ftpuserid=%db_login% ftppasswd=%db_password% reset "transfer=(name=RECVCLASS
RECEIVECLASS=%RCLASS% receive=%RCLASS%.%RNUM% UNCOMP=Y APPEND=Y )" save
```

- ## Put Class

```
tdclientc "network=%net_connect%" ftpuserid=%db_login% ftppasswd=%db_password% reset "transfer=(name=SEND
senduserid=%db_login% send=.\outgoing\%SCLASS% other_comp_parms=secfile=.\maint\secfile)" save
```

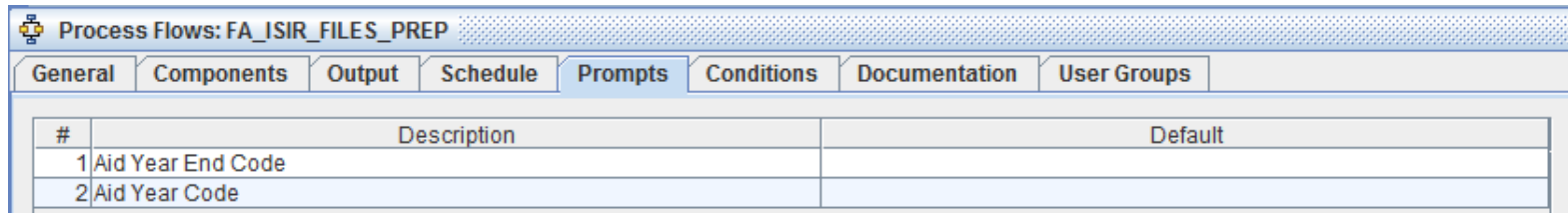# TD Client Output Scan

# TD Client Customization

The TDClient Software configuration needs to be customized slightly to change some behavior conducive to batch execution.  This change is to prevent failed logins from retrying in order to prevent the account from being locked if the password between Applications Manager, Ed Connect, and SAIG become out of sync

The following modifications should be made to the TDClient.ini file:

MAX_RETRY=1

# ISIR Class Downloads

When this process is done manually, it requires specifying many parameters. And many times the same value is entered repetitively for different jobs.

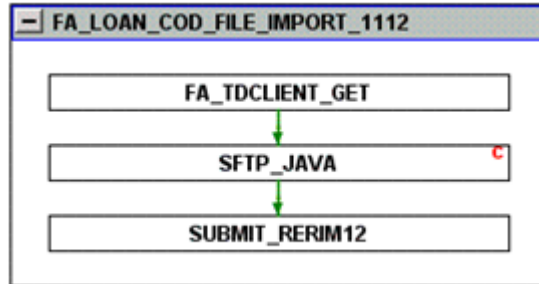Using Automic prompts the parameters for this process have been consolidated down to two.

**Process Flows: FA_ISIR_FILES_PREP**

| General | Components | Output | Schedule | Prompts | Conditions | Documentation | User Groups |
|---------|-----------|--------|----------|---------|------------|---------------|-------------|

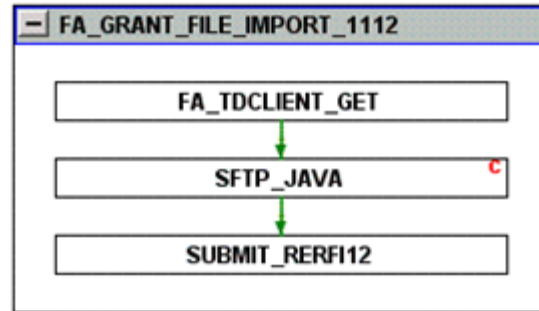| # | Description | Default |
|---|-------------|---------|
| 1 | Aid Year End Code | |
| 2 | Aid Year Code | |

# ISIR Class Downloads
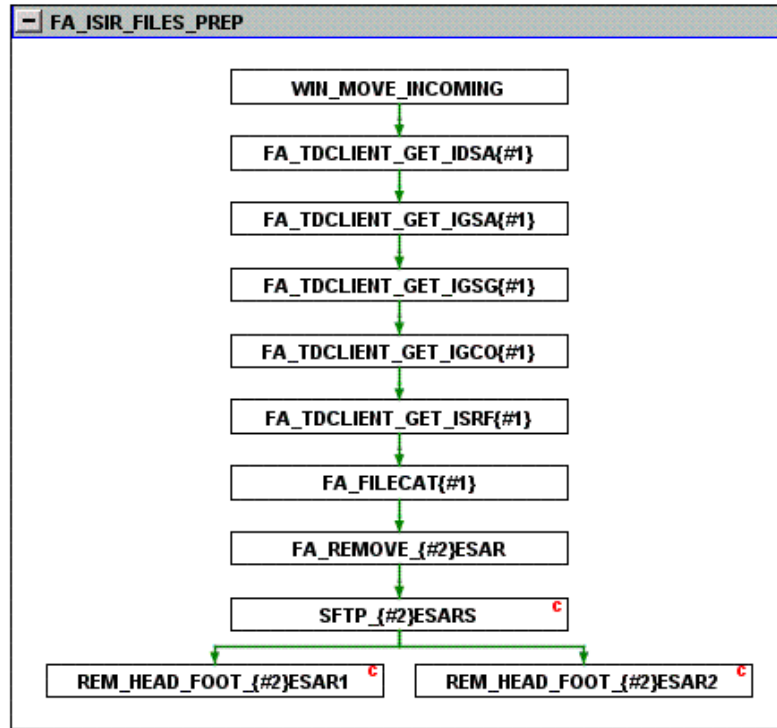
# Download and Load Loan XML Files

# Download and Load Grant XML Files

# Generate and upload Correction Files