PeopleSoft Campus Solutions 9.2

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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks i
Using and Managing the PeopleSoft Online Help iv
PeopleSoft CS Related Links iv
Contact Us iv
Follow Us iv

1 Getting Started with Financial Aid

Financial Aid Overview 1
Financial Aid Business Processes 1
Financial Aid Integrations 3
Financial Aid Implementation 4
Additional Information for Getting Started with Financial Aid 5
Common Elements Used in Financial Aid 6

2 Setting Up Your Financial Aid Awarding Cycle

Understanding the Financial Aid Awarding Cycle 1
    Prerequisites 2
Establishing Aid Years 2
    Pages Used to Establish Aid Years 3
    Defining Federal Aid Years 3
    Associating Federal Aid Years with Academic Years 3
Setting Up Your School Codes 4
    Pages Used to Set Up School Codes 5
    Defining Your School Code 5
    Defining Your Campus OPEID Codes 6
    Associating School Codes with an Aid Year 7
Establishing Defaults 8
    Understanding Defaults 8
    Pages Used to Establish Defaults 9
    Defining Installation Level Defaults 9
    Creating Aid Processing Rule Sets 18

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Linking Aid Processing Rule Sets to Careers and Programs 19
Establishing Careers and Programs 20
Pages Used to Establish Careers and Programs 20
Listing Valid Careers for the Aid Year 21
Defining Valid Programs for Aid Year and Career 23
Associating Careers with School Codes 24
Defining Valid Terms for Careers 25
Assigning Financial Aid Career Types 28
Activating an Aid Year for a Student 29
Pages Used to Activate an Aid Year for a Student 29
Activating an Aid Year Manually 29
Activating an Aid Year in Batch 30
Reviewing NSLDS Codes 31
Page Used to Review NSLDS Codes 31
Reviewing the NSLDS Code Table 31
Defining Aid Year Rollover 32
Understanding Aid Year Rollover 33
Pages Used to Define Aid Year Rollover 34
Setting Up Term Values Cross Reference 34
Setting Up Aid Year Rollover 35
Reviewing Table Rollover Options 39

3 Setting Up Financial Aid Terms

Understanding Financial Aid Terms 1
Defining the Parameters for Creating Financial Aid Terms 1
Page Used to Define the Parameters for Creating Financial Aid Terms 2
Setting Up Financial Aid Terms 2
Setting Up Cost Codes 5
Pages Used to Set Up Cost Codes 5
Defining Cost Codes 6

4 Setting Up Student Budgets

Understanding Student Budgets Setup 1
Budget Components 1
Budget Assignment Formulas 2
Defining Budget Components 2
Common Elements Used in This Section 2
Pages Used to Define Budget Components 3
Defining Budget Categories 4
Defining Budget Equations 7

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Defining Budget Items 7
Defining Budget Formulas 10
Defining Budget Formula Groups 13
Defining Budget Assignment Trees 14
Creating Budget Groups 15
Pages Used to Create Budget Groups 15
Defining Detailed Budget Groups 16
Defining Generic Budget Groups 17
Preparing for Background Budget Assignment 18
Pages Used to Prepare for Background Budget Assignment 19
Specifying Careers 19
Assigning Automated Budget Categories 20
Creating Budget Assignment Run Controls 23

5 Setting Up Packaging Basics

Understanding Packaging Basics 1
Prerequisites 1
Common Element Used in Packaging Basics 2
Award Adjustment Reasons 2
Early Financial Aid Offers 2
Awarding versus Packaging 2
Financial Aid Item Types 2
Defining Packaging Variables 3
Understanding Packaging Variables 3
Pages Used to Define Packaging Variables 4
Defining Package Rating Components 5
Entering Institution-Specific Variables 6
Populating Rating Components in Batch 7
Populating Rating Components Manually 9
Entering Additional Packaging Variables 10
Defining Disbursement Plans and Split Codes 11
Understanding Disbursement Plans and Split Codes 11
Pages Used to Define Disbursement Plans and Split Codes 12
Creating Disbursement Plans 13
Setting Up Disbursement IDs 16
Setting Up Disbursement Split Codes 18
Defining Split Code Formulas 19
Setting Up Aggregate Aid 23
Understanding Aggregate Aid 23
Pages Used to Set Up Aggregate Aid 24
Reviewing Aggregate Levels 25

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Establishing Aggregate Programs 27
Creating Aggregate Aid Limits 28
Creating Aggregate Area Translations 42
Selecting Aggregate Areas for Institutions 43
Setting Up Award Messages 45
Pages Used to Set Up Award Messages 45
Defining Award Messages 45
Setting Up Loan Fees 46
Page Used to Add Loan Fees 47
Creating Loan Fees 47
Defining Financial Aid Item Types 49
Pages Used to Define Financial Aid Item Types 49
Defining Financial Aid Item Type Descriptions 51
Viewing Item Type Detail 53
Defining Awarding and Rounding Rules 54
Defining Disbursement and Anticipated Aid 61
Setting Term Minimum and Maximum Award Limits 65
Defining Default Disbursement Plans and Split Codes 66
Attaching Loan Fees 68
Defining Gap Financial Aid Item Types 71
Budgeting Fiscal Limits 72
Understanding Fiscal Limits 72
Pages Used to Budget Fiscal Limits 72
Assigning Fiscal Limits to Financial Aid Item Types 73
Reviewing Fiscal Fund Status 76
Reviewing Fiscal Fund Notes 77
Reviewing Fiscal Limits for Aggregate Areas 78
Packaging for Pell Grant Eligibility 79
Pages Used to Package for Pell Grant Eligibility 79
Loading Pell Schedules into Pell Table Enablement Tables 79
Comparing Published Pell Schedules with Existing Pell Table Data 80
Preparing for Early Financial Aid Offers 82
Understanding Early Financial Aid Offers 82
Page Used to Prepare for Early Financial Aid Offers 82
Setting Up Early Financial Aid Offer Categories 83
Setting Up Restricted Aid 83
Understanding Restricted Aid 83
Pages Used to Set Up Restricted Aid 84
Defining Restricted Aid Basic Information 85
Defining Award Limits and Requirements 85
Attaching an External Organization 86
Assigning a Committee 87

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Setting Up Award Adjustment Reasons 88
Pages Used to Set Up Award Adjustment Reasons 89
Creating Award Adjustment Reasons 89

6 Setting Up External Awards

Understanding External Awards 1
Types of External Award Data 1
Data Sources and Methods to Obtain External Awards 1
Data Flow of External Awards to Student Award Tables 2
Special Consideration for Student Financial Payments 3
Awarding Loan Certifications as External Awards 3
Setting Up External Award Processing 3
Pages Used to Set Up External Award Processing 4
Defining External Award Types 4
Defining External Award Sources 5
Cross-Referencing External Award Attributes to Financial Aid Item Types 6
Defining Search and Match Criteria 9
Page Used to Define Search and Match Criteria 9
Defining Search and Match Criteria for the External Award Load Process 9
Planning for File Parser and External Award Processing 11
Using the Context Definition 11
Using the File Mapping Definition 11
Reviewing the External Award Staging Tables 12

7 Setting Up Auto Packaging and Mass Packaging

Understanding Auto Packaging and Mass Packaging 1
Prerequisites 1
Understanding Packaging Plans 1
Using Equation Engine in Packaging 2
Viewing and Editing Equations 6
Understanding the Equation Engine 6
Page Used to View and Edit Equations 6
Reviewing Field Names for Equations 6
Using Packaging Data Source and Equation Engine 7
Rounding in Packaging Using Equations 11
Reviewing Equations 12
Page Used to Review Equations 13
Viewing Equations as Algebraic Expressions 13
Reviewing Equation Examples 14
Packaging Selection Equation 15

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Packaging Calculation Equation 15
Verifying Student Is Enrolled Equation 16
Creating Equity Item Type Groups 18
Understanding Equity Item Type Groups 18
Page Used to Create Equity Item Type Groups 19
Defining Equity Item Type Groups 19
Creating Related Item Type Groups 20
Understanding Related Item Type Groups 20
Page Used to Create Related Item Type Groups 20
Defining Related Item Type Groups 20
Defining Packaging Plans 21
Understanding Packaging Plan Setup 22
Pages Used to Define Packaging Plans 22
Defining Packaging Plan IDs 24
Setting Up FM Packaging Target 26
Setting Up IM Packaging Target 28
Defining Packaging Equity Limits and Offsets 29
Defining Loan and Work Packaging Limits 33
Defining Packaging Rules: Item Type Selection, Sequence and Limits 35
Setting Packaging Rule Award Limits 38
Defining Packaging Rules: Award Status, Disbursement Plan and Split Code 39

8 Setting Up Repackaging

Understanding Repackaging Strategy and Rules 1
Prerequisites 1
Repackaging Strategy 2
Repackaging Students with Multiple Careers 3
Increase Rule 3
Decrease Rule 4
Original Package Plan Rule 4
Validate Entire Package Rule 5
Validate Item Type Rule 6
Setting Up a Repackaging Plan 6
Pages Used to Set Up a Repackaging Plan 6
Excluding an Item Type from Repackaging 6
Defining Repackaging Rules 7
Examples of Repackaging Rules 12
Setting Up Repackaging Processing 19
Pages Used to Set Up Repackaging Processing 20
Defining the Context for a Repackaging PS Query 20
Setting Up a Population Selection PS Query for Repackaging 21

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Setting Up a Batch Repackaging Selection Using Equations 22

9 Setting Up Loan Counseling

Understanding Loan Counseling 1
Pages Used for Loan Counseling Setup 1
Selecting the Loan Counseling Version 2
Selecting an Item Type Loan Entrance Interview Disbursement Requirement 3
Mapping the OPEID and COD Routing ID to Institutions 4
Defining Loan Counseling Types 5
Specifying Loan Counseling Attributes 6
Defining Search/Match for Loan Counseling Data Import 8

10 Setting Up CommonLine 4 Loans

Prerequisites for Setting Up CommonLine 4 Loans 1
Setting Up Loan Participants 1
Understanding Loan Participants 1
Pages Used to Set Up Loan Participants 2
Adding or Updating Lender Information 4
Identifying Lenders as Loan Participants 5
Updating Guarantor Information 5
Identifying Guarantors as Loan Participants 6
Adding or Updating Servicer Information 7
Identifying Servicers as Loan Participants 8
Setting Up Loan Types 9
Pages Used to Set Up Loan Types 10
Defining Loan Types 10
Linking CommonLine Loan Types to NSLDS Loan History Information 12
Assigning Loan Checklists 13
Setting Up Loan Validation Edits 14
Understanding Loan Validation Edits 14
Pages Used to Set Up Loan Validation Edits 15
Defining Validation Edit Messages 15
Creating Loan Validation Edit Sets 20
Selecting Equations for the Hold and Release Process 22
Page Used to Set Equations for Hold and Release 22
Selecting Equations for Hold and Release 22
Creating Loan Destinations 23
Understanding Creating Loan Destinations 23
Pages Used to Create Loan Destinations 23
Defining Loan Destination Profiles 24

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Defining CommonLine Options 26
Defining Loan Destination Edits 29
Specifying Loan Processes 30
Pages Used to Specify Loan Processes 30
Specifying Loan Processes 30
Setting Up Loan Origination 32
Understanding Loan Origination 32
Pages Used to Set Up Loan Origination 35
Specifying a Default Loan Agency 35
Setting Up Loan Destination Defaults 36
Setting Up Process Demographic Data 37
Pages Used to Set Up Process Demographic Data 38
Setting Up Process Demographic Data 39
Setting Up Electronic Data Interchange 40
Understanding EDI Manager 41
Pages Used to Set Up Electronic Data Interchange 41
Creating EDI Entity Codes 42
Setting Up Financial Aid EDI Destinations 44
Setting Up EDI Partner Profiles 45
Setting Up Profile Defaults 46
Setting Up EDI Internal Partners 47
Setting Up EDI External Partners 48
Setting Up Loan Transfer IDs 50
Reviewing Loan Action Codes 51
Pages Used to Review Loan Action Codes 51
Viewing Loan Action Codes 51

11 Setting Up Common Record CommonLine (CRC)

Common Element Used in Common Record CommonLine (CRC) 1
Setting Up Loan Participants for CRC 1
Pages Used to Set Up Loan Participants 1
Setting Up Guarantors, Lenders, and Servicers for CRC 2
Setting Up Loan Types for CRC 3
Pages Used to Set Up Loan Types 3
Defining Loan Types 3
Linking CommonLine Loan Types to NSLDS Loan History Information 6
Assigning Checklists 6
Setting Up Loan Validation Edits for CRC 7
Understanding Loan Validation Edits 7
Pages Used to Set Up Loan Validation Edits 8
Defining Validation Edit Messages 8

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Creating Loan Validation Edit Sets 13
Selecting Equations for the Hold and Release Process for CRC 15
Page Used to Set Equations for Hold and Release 15
Selecting Equations for Hold and Release 15
Creating Loan Destinations for CRC 16
Understanding Creating Loan Destinations for CRC 17
Page Used to Create Loan Destinations 17
Defining Loan Destination Profiles for CRC 18
Defining Loan Processing Levels for CRC 19
Defining Loan Destination Validation Edits for CRC 21
Specifying Loan Processes for CRC 21
Pages Used to Set Up Loan Processes 22
Defining Loan Processes for CRC 22
Setting Up Loan Origination for CRC 23
Understanding Loan Origination for CRC 23
Pages Used to Set Up Loan Origination for CRC 27
Specifying a Default Loan Agency for CRC 27
Setting Up Loan Destination Defaults for CRC 28
Setting Up Process Demographic Data for CRC 29
Pages Used to Set Up Demographic Data for CRC 30
Setting Up Process Demographic Data for CRC 31
Setting Up Certification Requests for CRC 32
Page Used to Set Up Certification Requests 32
Defining Search Match Criteria for CRC 32
Reviewing Loan Action Codes for CRC 33
Page Used to Review Loan Action Codes 33
Reviewing Loan Action Codes 33

12 Setting Up Direct Loans

Overview of Direct Lending 1
Before You Begin 1
Setting Up Financial Aid Item Types 2
Pages Used to Set Up Financial Aid Item Types 2
Defining Financial Aid Item Types 3
Setting Up Financial Aid Item Type Awarding Rules 4
Setting Up Financial Aid Item Type Award Attributes 5
Setting Up Financial Aid Item Type Award Limits 6
Setting Up Financial Aid Item Type Disbursement Rules 6
Setting Up Financial Aid Item Type Loan Fees 7
Setting Up Promissory Notes in Campus Community 9
Setting Up Direct Lending 12

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Pages Used to Set Up Direct Lending 13
Viewing EDI Profile Defaults 16
Setting Up Loan Destination Profiles for Direct Lending 18
Setting Up Global Direct Lending Change Parameters 20
Setting Up Loan Institution Table for Direct Lending COD 22
Setting Up Destination Defaults for Direct Lending 25
Setting Up Attended School Routing ID's 26
Setting Up Loan Report Packages for Direct Lending 27
Setting Up DL Serial Promissory Note Table 29
Setting Up Loan Servicer Table for Direct Lending 29
Setting Up Loan Transfer IDs for Direct Lending 32
Setting Up Loan Types for Direct Lending 33
Setting Up 150 Percent Direct Subsidized Loan Limit (SULA) 41
Viewing System Administration Information 45
Pages Used to View System Administration Information 45
Viewing Loan Action Codes 46
Viewing Direct Lending Change Fields 46

13 Setting Up for Pell Payment Processing

Common Elements Used in Pell Payment Processing 1
Setting Up Pell Funding Method 1
Understanding Pell Funding Method 1
Defining Pell Funding Method 1
Setting Up Pell Payment Information 2
Pages Used to Define Pell Payment Information 2
Defining Pell Payment Setup 2
Copying Pell Payment Options 6
Changing Pell Payment Default Information 7
Setting Up Pell Reporting Identification Data and Processing Options 8
Page Used to Set Up Pell Reporting Identification Data and Processing Options 8
Defining Pell Reporting Identification Data 9
Setting Up Pell Multi-Campus Identification 10
Page Used to Define Pell Multi-Campus Identification 10
Defining Pell Multi-Campus Identification 10
Setting Up Severity Levels for Pell Comment Codes 11
Pages Used to Define Severity Levels for Pell Comment Codes 12
Defining Severity Levels for Pell Comment Codes 12
Copying Pell Comment Codes 13
Defining Reconciliation Periods 14
Page Used to Define Reconciliation Periods 14

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Defining Reconciliation Periods 14

14 Setting Up the Perkins MPN

Understanding the Perkins MPN Setup 1
Setting Up the Perkins MPN 1
Pages Used to Set Up the Perkins MPN 1
Defining Perkins MPN Options 2
Defining Type of Name, Address, and Telephone Number Usage 3
Defining MPN Requirement for Financial Aid Item Types 4

15 Setting Up Disbursement Rules

Understanding Disbursement Rules 1
Prerequisites 1
Disbursement Rules 1
Disbursement Proration Rules 3
Global Disbursement Rules 3
Item Type Disbursement Rules 3
Authorization and Disbursement Calendars 4
Disbursement ID Table Review 4
Defining User Edit Messages 5
Understanding User Edit Messages 5
Page Used to Define User Edit Messages 5
Creating User Edit Messages 5
Setting Up Disbursement Proration Rules 6
Page Used to Set Up Disbursement Proration Rules 6
Defining a Proration Scheme 7
Defining Global Disbursement Rules 8
Pages Used to Define Global Disbursement Rules 8
Defining Basic Global Rules for Authorization 8
Assigning Service Impacts, Tracking Groups, and User Edit Messages 11
Defining Item Type Disbursement Rules 13
Pages Used to Define Item Type Disbursement Rules 13
Defining Authorization Rules for a Financial Aid Item Type 14
Defining Additional Restrictions 20
Assigning Checklists, Tracking Groups, Service Indicators, and User Edit Messages 22
Setting Up Authorization and Disbursement Calendars 24
Pages Used to Set Up Authorization and Disbursement Calendars 24
Defining the Authorization Calendar 24
Defining the Disbursement Calendar 26

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16 (GBR) Setting Up Student Loans Company

Understanding SLC 1
Prerequisites 1
Setting Up SLC Processing 1
Pages Used to Set Up SLC Processing 2
Defining SLC Options 2
Defining Search Match Options 6
Defining Liability Periods 7
Completing Prerequisites for SLC FTE Calculation 8
Completing Prerequisites for Reporting Part-time and Full-time Academic Loads 10

17 Setting Up Return of Title IV Funds

Understanding Return of Title IV Funds 1
Common Elements Used in Setting Up Return of Title IV Funds 1
Defining Title IV Funds Item Types 1
Page Used to Define Item Types for RTIVF 1
Defining Title IV Funds Financial Aid Item Types 2
Defining Institutional Charges 3
Page Used to Define Institutional Charges 3
Setting Up Institutional Charges 3

18 (CAN) Setting Up Canadian Need Analysis

Understanding CNAS 1
Defining CNAS 1
Pages Used to Set Up CNAS 2
Defining CNAS Rules 5
Reviewing CNAS Message Tables 6
Defining CNAS Options - Table 1 6
Defining CNAS Options - Table 2 8
Defining CNAS Options - Table 3 10
Defining Financial Parameters for Minimum Wage 12
Defining Financial Parameters for MSOL Setup 13
Defining Financial Parameters for Parent MSOL Setup 14
Defining Financial Parameters for Tuition and Fees 15
Defining Financial Parameters for Parent Weekly CSL Contribution 15
Defining Financial Parameters for Parent Weekly OSL Contribution 16
Defining Financial Parameters for Parent Yearly Income 16
Defining Financial Parameters for Program Weekly Maximum Entitlements 17
Defining Financial Parameters for Prestudy Tax Deductions Setup 18

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Defining Financial Parameters for Study Period Tax Deductions Setup 18
Defining Financial Parameters for Spouse Tax Deductions Setup 19
Defining Financial Parameters for Parent Federal Tax Deductions 19
Defining Financial Parameters for Parent Provincial Tax Deductions 20
Defining Financial Parameters for Part-time Maximum Entitlements 21
Adding a Full-time or Part-time Canadian Application 21
Setting Up Cost Codes 22

19 Managing Financial Aid Terms

Understanding Managing Financial Aid Terms 1
Prerequisites 1
Methods to Build Financial Aid Terms 2
Building Financial Aid Terms Online 2
Common Elements 3
Pages Used to Build Financial Aid Terms Online 3
Setting Overrides for Financial Aid Term 5
Building a Financial Aid Term 5
Viewing Term Build Details 11
Overriding Census Date Locking 13
Viewing Academic Advisor Information 15
Viewing Campus Information 15
Viewing Academic Level and Load Information 16
Viewing Academic Statistics 18
Viewing Transfer Credit Information 24
Viewing Term Statistics for a Student's Other Career 25
Viewing a List of the Student's Classes 26
Viewing Loan, Graduation, and Budget Information 26
Viewing Changes in a Student's FA Term Information 31
Viewing Student Records Term Information 32
Viewing Withdrawal Information 34
Viewing One Big Beautiful Bill (OB3) Information 35
Building Financial Aid Terms Manually 36
Building Financial Aid Terms in Batch 36
Understanding Building Financial Aid Terms in Batch 37
Pages Used to Build Financial Aid Terms in Batch 37
Creating FA Term Driver Records 37
Creating Financial Aid Terms in Batch 38
Using the Financial Aid Term Census Report 39
Page Used to Identify Students Not Enrolled After Census with Award Balances 39
Identifying Students Not Enrolled After Census with Award Balances 39
Updating Financial Aid Progress Units 40

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Page Used to Update Financial Aid Progress Units 40
Updating Financial Aid Progress Units 40

20 Working with Student Budgets

Understanding Student Budgets 1
Budget Calculations 1
Common Elements Used in Student Budgets 1
Assigning Budgets in Batch 2
Prerequisites 2
Pages Used to Assign Budgets in Batch 2
Selecting Students for Batch Budget Assignment 4
Viewing Batch Student Budget Review 4
Processing Equations 7
Processing Formulas 9
Processing Trees and Tuition 11
Moving Student Budgets 11
Maintaining Budget Tables 11
Applying Pell Adjustments 12
Assigning Budgets Online 12
Pages Used to Assign Budgets Online 12
Creating Budgets Online 13
Reviewing Term Budget Information 14
Maintaining a Term Budget 15
Pages Used to Maintain a Term Budget 15
Maintaining an Existing Term Budget or Creating a Term Budget 15
Reviewing Students' Budget Information 18
Page Used to View Student's Budget Information 18
Viewing Students' Budget Information 18

21 Defining Application Processing Options

Prerequisites for Defining Application Processing Options 1
Working with Applications 1
Understanding Application Processing Options 1
Pages Used to Work with Applications 2
Defining Application Source Rank 3
Reviewing Admit Level Associations 4
Setting Up Academic Career Assignments from the Financial Aid Application 6
Setting Up Financial Aid Processing 7
Understanding Financial Aid Processing Setup 7
Pages Used to Set Up Financial Aid Processing 10

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Defining ISIR Data Load Options 1 11
Defining ISIR Data Load Options 2 16
Defining ISIR Data Load Options 3 18
Defining ISIR Institutional Search Match 20
Setting Severity Levels for ISIR Reject Reasons 23
Setting Severity Levels for ISIR Comment Codes 24
Setting Up Financial Aid EDI Transactions 25
Setting Up Commit Levels for COBOL Processes 25
Reviewing Cross-References 26
Pages Used to Review Cross-References 27
Reviewing ISIR SAR Cross-References 27
Reviewing Institutional Application Cross-References 28
Setting Up PROFILE Data Load Parameters 29
Page Used to Set Up PROFILE Data Load Parameters 30
Setting Up PROFILE Data Load Parameters 30

22 Processing Federal Financial Aid Applications

Understanding Federal Financial Aid Application Processing 1
Processing Inbound Files 2
Pages Used to Process Inbound Files 2
Understanding the FA Inbound Process 3
Importing Federal Data Files 6
Loading ISIR Files 6
Managing Suspended ISIRs 7
Pages Used to Manage Suspended ISIRs 7
Using ISIR Suspense Management 9
Viewing Detailed Status Information from the ISIR Load Process 12
Viewing Information Generated by CPS/FPS for the ISIR 14
Viewing ISIR Reject Codes 16
Reviewing Corrected Fields 16
Managing ISIRs Suspended in Batch 17
Correcting ISIRs 21
Understanding ISIR Corrections 22
Pages Used to Make ISIR Data Corrections 23
Using the ISIR Correction Component 25
Reviewing and Correcting FAFSA Information 25
Viewing and Correcting Transaction Details 27
Viewing SAI and Flags 28
Making ISIR Corrections for 2022-2023 and 2023-2024 29
Understanding ISIR Corrections 29
Pages Used to Make ISIR Data Corrections 31

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Using the ISIR Correction Component 34
Reviewing FAFSA Student Information 34
Reviewing FAFSA Parent Information 36
Correcting Assumptions and School Code Information 37
Viewing EFC Status and Database Matches 37
Processing Outbound Files 38
Pages Used to Process Outbound Files 39
Moving Records to Outbound Staging Tables 40
Creating Outbound Files for CPS/FPS 40
Viewing Outbound Staging Table Files 41
Viewing Outbound Staging Table Data 41
Processing Rejected ISIR Correction Files 41
Pages Used to Process Rejected ISIR Correction Files 42
Loading Error Files 42
Making Corrections to Rejected ISIR Corrections 43
Working with ISIRs 45
Pages Used to Work with ISIRs 45
Adding Your Institution to a Student's ISIR 46
Sending FAFSA Signature Receipt Information 46
Using the Batch Message Print Page 47
Deleting ISIR and NSLDS Information 47
Pages Used to Delete ISIR and NSLDS Information 48
Deleting ISIR Records 48
Deleting NSLDS Records 49
Viewing ISIR History 51
Pages Used to View ISIR History 52
Viewing ISIR Reports 53
Pages Used to Produce ISIR Reports 53
Using the ISIR Reject/Assumption Report 54
Reviewing ISIR Correction Audits 55

23 Processing and Using Institutional Financial Aid Applications

Maintaining Institutional Financial Aid Applications 1
Common Elements Used in This Section 2
Pages Used for Institutional Applications 4
Reviewing Student Information 5
Reviewing Custodial Parent Information 8
Reviewing Non Custodial Parent Information 11
Reviewing Processing Messages and Institutional Questions 12
Reviewing All Computed Data for Student and Parents 13
Loading and Managing PROFILE Records 16

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Pages Used to Load and Manage PROFILE Records 16
Loading PROFILE Applications 17
Viewing PROFILE Load Summaries 19
Managing Suspended PROFILE Records 23
Reviewing Institutional Correction Audits 27
Page Used to Review Institutional Correction Audits 27
Viewing PROFILE Audits 28
Deleting PROFILE Records 28

24 Performing Need Analysis

IM Connectivity Testing 1
Pages used for IM Connectivity Testing 1
Setting Up Service Operations for IM Connectivity Testing 1
Testing IM Connectivity 3
Defining Federal and Institutional Methodologies 4
Understanding FM and IM 5
Pages Used to Define FM and IM 6
Defining Global and Federal Options for 2023-2024 and Prior Aid Years 8
Defining Global Options for 2024-2025 and Future Aid Years 11
Using EFC Proration Options (2023-2024 and Prior Aid Years Only) 14
Defining FM Budget Durations (2023-2024 and Prior Aid Years Only) 15
Defining IM Budget Durations 16
Defining IM Tax and Assessment Parameters (2023-2024 and Prior Aid Years Only) 17
Defining EFM Options (2023-2024 and Prior Aid Years Only) 21
Defining IM Value Parameters 1 (2023-2024 and Prior Aid Years Only) 22
Defining IM Value Parameters 2 (2023-2024 and Prior Aid Years Only) 22
Defining IM Yes and No Options (2023-2024 and Prior Aid Years Only) 22
Defining Minimum Student Contribution (2023-2024 and Prior Aid Years Only) 26
Defining Asset Options (2023-2024 and Prior Aid Years Only) 26
Defining Home and Asset Projections (2023-2024 and Prior Aid Years Only) 27
Defining Minimum Parental Contribution (2023-2024 and Prior Aid Years Only) 29
Defining Budget Options (2023-2024 and Prior Aid Years Only) 29
Using FM and IM Extensions to Override Options 31
Pages Used to Override Options in ISIR Corrections 31
Overriding Federal Methodology Need Analysis Calculator (FM NAC) Federal Extension Options 33
Overriding INAS Institutional Extension Options 1 35
Overriding INAS Institutional Extension Options 2 37
Overriding INAS Institutional Extension Options 3 38
Overriding INAS Institutional Extension Options 4 39
Overriding INAS Institutional Extension Options 5 40

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Overriding the Expected Family Contribution 41
Pages Used to Override and View EFC 43
Using the Federal EFC Override Function 44
Using the Institutional EFC Override Function 45
Using Estimated FM Values 46
Using FM Simulation 46
Understanding the Steps for FM Simulation 47
Pages Used for FM Simulation 48
Common Page Elements for the FM Simulation Component 49
Working with Student, Student Spouse, Parent, and Parent Spouse/Partner Information 49
Overriding Global Policy Options 50
Working with Overrides in Transaction Details 50
Using FM Simulation for the 2023-2024 and 2022-2023 Aid Years 51
Understanding the Steps for FM Simulation 51
Pages Used for FM Simulation 52
Common Page Elements for the FM Simulation Component 53
Working with Student Income and Assets 54
Overriding Global Policy Options at the Student Level 54
Working with Student Information 55
Working with Parent Income and Assets 56
Working with Parent Information 56
Working with Assumption Overrides 56
Performing Mass SAI/EFC Calculations 57
Page Used for Performing Mass SAI/EFC Calculations 57
Calculating SAIs/EFCs in Mass 58
Using INAS Batch Calculations 59
Page Used to Make INAS Batch Calculations 59
Calculating the INAS in Batch 59
Viewing Federal SAI/EFC Information 60
Pages Used to Review Federal SAI/EFC Information 60
Reviewing Federal SAI/EFC Summary Information 62
Viewing Institutional EFC Information 62
Understanding Institutional EFC Calculations 62
Pages Used to View Institutional EFC 63
Reviewing an Institutional EFC Summary 67
Reviewing Need Summary 68
Pages to View Need Summary 68
Viewing Need Summary Information 68
Reviewing FM NAC and INAS Assumption Codes 69
Pages Used to Review the FM NAC and INAS Assumption Codes 69
Reviewing FM NAC Assumption Codes for 2023-2024 and Prior Aid Years 70
Reviewing INAS IM Assumption Codes 70

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Loading Outside Application Data 70
Loading Externally Sourced Outside Application Data into Staging Tables 70
Moving Outside Application Data From the Staging Table One Student Record at a Time 71
Moving Outside Application Data From the Staging Table in Batches (Multiple Records at a Time) 72
Reviewing Outside Application Data 73
Pages Used to Review Outside Application Data 74
Managing Outside Application Data 74
Pages Used to Manage Outside Application Data 74
Adding and Updating Outside Application Records 75
Calculating Outside Applications in Mass 76
Deleting Outside Application Records 77
FM Test Harness 77
Pages Used for FM Test Harness 78
Generating a Feature File Using CLI 78
Performing a Standalone FM NAC Calculation 78
IM Test Harness 80
Page Used for IM Test Harness 80
Generating a Request JSON File to Test IM INAS Calculation 80
OA Test Harness 81
Pages Used for OA Test Harness 81
Generating a Feature File to Test OA Calculation 81
Performing a Standalone OA Calculation 82

25 Assessing Eligibility for Financial Aid

Setting Up Verification Options 1
Pages Used to Set Up Verification Options 1
Setting Up Tolerances 1
Mapping Institutional Marital Statuses 3
Verification Field Numbers 5
Verifying Resource and Household Information for the 2023-2024 and Prior Aid Years 5
Pages Used to Verify Resource and Household Information 6
Viewing Financial Aid Administrator Information 9
Verifying Household Information 9
Verifying Tax Data 11
Verifying W-2 Information 14
Verifying Federal Untaxed Income 15
Verifying Federal Additional Financial Information 15
Verifying Institutional Untaxed Income 15
Verifying Institutional Other Taxable Income 17
Consolidating Forms 17

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Viewing Federal Consolidated Tax Data 18
Viewing Institutional Consolidated Tax Data 19
Verifying Resource and Household Information for the 2024-2025 and Future Aid Years 20
Pages Used to Verify Resource and Household Information 20
Viewing Financial Aid Administrator Information 23
Verifying Household Information 23
Verifying Tax Data 25
Verifying W-2 Information 28
Verifying Federal Untaxed Income 28
Verifying Federal Additional Financial Information 29
Verifying Institutional Untaxed Income 29
Verifying Institutional Other Taxable Income 30
Consolidating Forms 31
Viewing Federal Consolidated Tax Data 32
Viewing Institutional Consolidated Tax Data 33
Working with Auto Verification 33
Pages Used for Auto Verification 34
Using Auto Verification 34
Editing Student Level Tolerances 36
Editing Verification Status 36
Comparing Verification Results 36
Using Batch Verification 37
Pages Used for Batch Verification 37
Processing Batch Consolidation 38
Viewing Batch Consolidated Tax Data 38
Processing Batch Verification 39
Using Batch Verification Summary 40
Using Batch Verification Detail 40
Managing Ability to Benefit 40
Understanding Ability to Benefit 40
Pages for Managing Ability to Benefit 41
Updating SEC Descriptions 41
Creating and Managing Ability to Benefit 42
Creating Ability to Benefit Data in Batch 43
Using NSLDS Data and Processes 44
Understanding NSLDS Data and Processes 45
Pages Used to Review and Process NSLDS Data 46
Generating Financial Aid History or Transfer Student Monitoring Inform File Requests 48
Loading Financial Aid History and Transfer Student Monitoring Files 51
Setting Up NSLDS Data Load Parameters 51
Understanding the Process NSLDS Files Logic 54
Processing NSLDS Files 54

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Using NSLDS Suspense Management 55
Generating NSLDS FAT Load Error Reports 59
Using NSLDS Change Review 60
Processing NSLDS Alert File Information 61
Reviewing NSLDS General Aggregate Information 62
Viewing Details of NSLDS Aggregate Data 67
Viewing NSLDS Pell Information 71
Viewing NSLDS ACG Grant Details 72
Viewing NSLDS NSG Grant Details 73
Viewing NSLDS TEACH Grant Details 74
Viewing NSLDS IASG Grant Details 75
Viewing NSLDS Additional Information 76
Understanding the NSLDS Data Push Process 77
Pushing NSLDS Data 79
Viewing Application History 82
Pages Used to View Application History 82
Reviewing Application History 84

26 Satisfactory Academic Progress

Understanding SAP 1
Overview of SAP Calculations 1
Eight Tests for SAP 3
Student Selection Criteria for SAP Evaluation 10
Batch, Online, and Simulation Processes 11
Pass 1 and Pass 2 Evaluations 11
Setting Up SAP 12
Pages Used to Set Up SAP 13
Defining SAP Status Codes 14
Setting Up Rules for Statuses and Actions and the Academic Standing, Maximum Attempted Units, and Maximum Attempted Term Tests 17
Setting Up Tests for Minimum Current or Cumulative GPA, Current or Cumulative Earned Units, and Two-Year GPA 23
Setting Up Course, Award, and Grade Exclusions 32
Setting Up SAP Communications 35
Setting Up Evaluation Terms for Aid Year Processing 38
Setting Up Evaluation Terms for Term Processing 38
Defining SAP Application Engine libraries. 39
Processing and Maintaining SAP 41
Pages Used to Process and Maintain SAP 41
Running the SAP Batch Process 42
Maintaining Student SAP 47
Viewing the Satisfactory Academic Progress Field 50

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Defining Student-Specific Career Exceptions 51
Defining Student-Specific Term Exceptions 53
Defining Student-Specific Aid Year Exceptions 55
Creating SAP Communications 56
Simulating a Student SAP Calculation 57
Reviewing Students from a Batch Run 60

27 Preparing for Awarding and Packaging

Making Early Financial Aid Offers 1
Prerequisites 1
Pages Used to Make Early Financial Aid Offers 1
Creating Early Financial Aid Offers 2
Viewing Admission Application Information 3
Selecting Your Application Data Source for Awarding 4
Entering Veteran Education Benefits 6
Page Used to Enter Veteran Education Benefits 7
Entering Other Educational Resource Information 7
Processing Other Educational Resources 8
Reviewing the Student's Packaging Status 9
Pages Used to Review the Student's Packaging Status 9
Reviewing the Packaging Status Summary Page 11
Viewing Database Matches 21
Reviewing the U.S.E.D. Database Match Process 32
Reviewing Pell Information 33
Overriding Pell Eligibility Calculation Setup Values 35
Reviewing the Student's Financial Aid Status 38
Page Used to Review the Student's Financial Aid Status 39
Reviewing the Financial Aid Status Page 39
Managing Aggregate Aid 42
Pages Used to Manage Aggregate Aid 43
Updating Aggregate Aid Information 43
Assigning Aggregate Sources 47
Using Mass Change for Packaging Status Attributes 48
Pages Used to Use Mass Change for Packaging Status Attributes 48
Selecting Students 49
Reviewing Selected Students 49
Moving Students into Financial Aid Batch Update 49
Updating Packaging Status Attributes 50
Awarding Restricted Aid 50
Understanding Restricted Aid 50
Pages Used to Award Restricted Aid 51

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Entering a Student's Restricted Aid 51
Entering Committee Comments 54
Entering Committee Member Comments 54
Evaluating a Student's Restricted Aid 55

28 Awarding and Packaging Students

Understanding Awarding and Packaging Students 1
Prerequisites 3
Understanding Manual Awarding, Auto Packaging, and Auto Select Packaging 4
Online Manual Awarding 5
Auto Packaging 5
Auto Select Packaging 6
Need Summary 7
Need Summary Validation 7
Understanding Mass Packaging 8
Awarding Online 9
Pages Used to Award Online 9
Viewing Need Summary Information 10
Viewing Term Summary Information 12
Using Auto Packaging and Auto Select Packaging 12
Viewing Award Disbursement Detail 26
Documenting Award Adjustments 28
Awarding Students Manually 29
Using Professional Judgement 30
Performing Mass Packaging Using Application Data 31
Pages Used to Perform Mass Packaging Using Federal Application Data 32
Running Mass Packaging Selection 33
Reviewing Students Selected for Mass Packaging 33
Assigning Packaging Plans to Students 34
Reviewing Packaging Plans Assigned by Query 36
Reviewing Packaging Plans Assigned by Packaging Plan 36
Processing Mass Packaging 36
Reviewing Mass Packaging Results 38
Pages Used to Review Mass Packaging Results 38
Reviewing Mass Packaging Summary Information 39
Reviewing Student Eligibility and Need Information 39
Reviewing Student Award Information 41
Reviewing Mass Packaging Errors 42

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29 Awarding Pell Grants

Awarding Pell Grants for the 2024-2025 and Future Aid Years 1
- Understanding Pell Grant Awarding 1
- Defining Pell Eligibility Calculation (PEC) Setup 3
- Defining Aggregate Aid Limit Percentage Maximums and Amounts for Pell Grants 9
- Calculating Pell Grants 10
- Repackaging Pell Grants 18
- Awarding Pell Grants Manually 18
- Awarding Pell Grants using Professional Judgment 18
- Reinstating a Canceled Pell Grant Award 18
- Awarding Pell Grants for Post-Baccalaureate Teaching Certificate Candidates 19

Awarding Pell Grants for the 2022-2023 and 2023-2024 Aid Years 19
- Understanding Pell Grant Awarding 19
- Defining Pell Eligibility Calculation (PEC) Setup 22
- Defining Aggregate Aid Limit Percentage Maximums for Pell Grants 28
- Calculating Pell Grants 29
- Packaging Pell Grants Using Pell Table Enablement Tables 43
- Repackaging Pell Grants 43
- Awarding Pell Grants Manually 44
- Awarding Pell Grants using Professional Judgment 44
- Reinstating a Canceled Pell Grant Award 44
- Awarding Pell Grants for Post-Baccalaureate Teaching Certificate Candidates 44

30 Managing Self-Service Awards

Managing Batch Processing 1
- Understanding Managing Batch Processing 1
- Page Used to Manage Batch Processing 1

Using Administrative Self-Service Inquiry Pages 1
- Pages Used to View Administrative Self-Service Activity 2
- Use Self-Service Activity 3
- Viewing Self-Service Awarding Activity Details 5
- Removing a Student in Needs Review or Rejected Status 5
- Viewing Self-Service Batch Summary 5
- Viewing Self-Service Requests 6

31 Managing External Award Reporting

Understanding External Award Processing 1

Manually Adding External Award Data 1
- Pages Used to Add External Award Data 2

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Adding External Awards by Type 2
Adding Award Disbursement Details 6
Adding External Awards by Student 8
Viewing Award Summary 9
Managing Existing External Award Transactions 10
Pages Used to Manage Existing External Award Transactions 10
Managing External Award Data 11
Managing External Award Data by Type 16
Managing External Award Data by Status 18
Viewing and Loading a Student's External Award Data 20
Processing Data from a File 22
Prerequisites 22
Pages Used to Process Data from a File 23
Loading External Award Data from a Data File 23
Viewing Summary Results of a File Load 23
Viewing Award Disbursement Details 27
Processing Student Financial Payments 27
Understanding Student Financials Payments 27
Page Used to Process Student Financial Payments 28
Receiving Student Financials Payments as External Awards 28
Example of Reporting a Student Financial Payment as an External Award 30
Loading Data to the Student Award Table 32
Understanding the External Award Load Process 32
Pages Used to Load Data to the Student Award Table 33
Loading External Awards in Batch 33
Viewing External Award Load Summary Data 37
External Award Error Messages 38

32 Managing Repackaging

Understanding Repackaging 1
Running the Need Summary Validation Process 2
Page Used to Run the Need Summary Validation Process 2
Selecting Students for Need Summary Validation 2
Performing Batch Repackaging 3
Pages Used to Perform Batch Repackaging 3
Selecting Students for Repackaging 5
Reviewing Students Selected for Batch Repackaging 6
Assigning Repackaging Plans to Selected Students 6
Reviewing Repackaging Plans Assigned by Query 7
Reviewing Repackaging Plans by Students 8
Repackaging Groups of Students 8

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Reviewing Batch Repackaging Summary 9
Reviewing Eligibility and Need After Repackaging 9
Reviewing Batch Repackaging Details 10
Reviewing Batch Repackaging Errors 10
Performing Online Repackaging 12
Pages Used to Perform Online Repackaging 13
Repackaging an Individual Student 13
Review a Repackaging Result 16
Repackaging Process Behavior 16
Example of a Decrease Repackaging Plan 17

33 Managing Special Cases in Packaging

Managing Special Cases When Packaging Students 1
Understanding Awarding and Packaging Students 1
Awarding for Additional Terms 2
Awarding for Non-Standard Terms 2
Awarding Without Application Data 3
Awarding for Increased Grade Level Eligibility 3
Adding Awards Using the Same Financial Aid Item Type 5
Re-awarding a Canceled or Declined Item Type 6
Canceling Awards with Disbursements 7
Sequencing Loan Awards 8
Processing Direct Loan Adjustments 9
Adjusting CommonLine Loan Item Types 13
Awarding for Multiple Careers 14
Understanding Awarding for Multiple Careers 14
Using Award Entry Pages for Multiple Careers 15
Packaging Sequential Careers 16
Packaging Replacement Careers 19
Making Award Adjustments with Multiple Careers 19
Using Auto Packaging with Multiple Careers 21
Using Mass Packaging with Multiple Careers 21
Understanding Multiple Award Period Processing 22
Processing Awards for Multiple Award Periods Employing Passive/Active Mode 23
Understanding Passive/Active Mode in Multiple Award Period Processing 23
Processing Sequential Award Periods 25
Processing Simultaneous Award Periods 30
Using Passive/Active Mode in Manual Packaging 33
Understanding Passive/Active Mode in Manual Packaging 33
Processing Sequential Award Periods 34
Awarding for a Single Award Period Followed by Both Award Periods 37

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Awarding for Both Award Periods Followed by a Single Award Period 38
Awarding Conditional Aid for Multiple Award Periods 40
Distributing Awards When a Shortage of Need Exists in One Award Period 42
Protecting Disbursements During Awarding 44
Understanding Disbursement Protection 45
Illustrating Disbursement Protection for Fully Disbursed Terms 47
Illustrating Even Across Disbursements by Term with Disbursement Protection Turned Off 50
Illustrating Even Across Disbursements by Term with Disbursement Protection Turned On 51
Illustrating Even Among First Disbursement for Term with Disbursement Protection Turned Off 52
Illustrating Even Among First Disbursement for Term with Disbursement Protection Turned On 53
Reviewing One-Term DL Loan Functionality 54
Understanding One-Term DL Loan Functionality 54
Page Used to Define a Single-Term Loan 55
Defining a Single-Term DL Loan 55
Awarding a Single-Term Loan After the Midpoint 56
Associating Rules with One-Term DL Processing 56
Reviewing Disbursement ID Scenarios 56
Managing Origination from Two-Term Loan to One-Term Loan 61

34 Reviewing Awards

Common Elements Used in Reviewing Awards 1
Reviewing Award Activity 1
Pages Used to Review Award Activity 1
Reviewing FA Term Data 2
Reviewing Aggregate Aid 2
Understanding Aggregate Aid Review 3
Pages Used to Review Aggregate Aid 3
Reviewing Aggregate Aid Summary 4
Reviewing Aggregate Aid by School 6
Viewing Aggregate Detail 7
Reviewing Aggregate Program Summary 8
Reviewing Student Packaging Status by Date 9
Pages Used to Review Student Packaging Status by Date 9
Reviewing ISIR Summary Information by Date 10
Reviewing Award Summary by Date 11
Reviewing Award Summary Information by Category 11
Pages Used to Review Award Summary Information by Category 11
Reviewing Award Summary Information 12

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Reviewing Total Award Summary Information 12
Pages Used to Review Total Award Summary Information 13
Reviewing an Annual Award Summary 13
Reviewing Anticipated Aid 13
Pages Used to Review Anticipated Aid 14
Reviewing Anticipated Aid by Term 14
Reviewing Anticipated Aid by Item Type 15
Expiring Anticipated Aid 15
Pages Used to Expire Anticipated Aid 16
Expiring Anticipated Aid 16
Expiring Anticipated Aid in Batch 17
Reviewing Overaward Amounts 17
Page Used to Review Overaward Amounts 18
Generating the Overaward Report 18

35 Notifying Students of Financial Aid Awards

Selecting Students and Creating a FAN Extract File 1
Understanding FAN Processing 1
Pages Used to Select Students and Create a FAN Extract File 2
Assigning FAN Communications Manually 3
Assigning FAN Communications Using Mass Change 3
Reviewing Students Selected for Award Notification 4
Selecting Students to Include in the Extract File 5
Creating the FAN Extract File and Producing the FAN Letter 8
Setting Up FAN Printing Using the Forms Engine 12
Understanding Forms Engine FAN Printing 12
Pages Used to Set Up FAN to Print Using Forms Engine 12
Setting Up FE Award Notification Form Types 13
Setting Up FA Demographic Use Information 14
Setting Up the Sort Order 15
Setting Up a Printer 16
Setting Up FE Award Notification Equations 17
Setting Up FE Award Notification Defaults 17
Printing FE FAN Using Forms Engine 21
Pages Used to Print FAN Using Forms Engine 21
Processing and Printing FE FAN Letters in Batch 22
Processing and Printing an Individual FE FAN Letter 26
Viewing FE Award Notification Inquiries 29
Viewing Award Notification Summary 30
Reprinting FE FAN Letters 31
Modifying FE FAN Form Letter Templates 32

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Changing an Address 32
Changing Messages and Instructions 32
Setting Up and Accessing a College Financing Plan 33
Understanding the College Financing Plan 33
Pages Used for College Financing Plan 34
Setting Up Group Options 34
Setting Up Institution Information 37
Setting Up Budget Mapping 42
Setting Up Award Mapping 42
Mapping Housing 44
Defining Interest Rates and Work Hours 44
Assigning College Financing Plan Groups 45
Viewing the College Financing Plan 46

36 Processing CommonLine Loans

Understanding CommonLine Loan Processing 1
CommonLine Loan Outbound Process Flow 1
Inbound File Processing 2
Managing Promissory Notes 3
Pages Used to Manage Promissory Notes 4
Entering Stafford Promissory Note Data 5
Reviewing Biographical and Demographic Data 7
Reviewing Promissory Note Action Status 7
Entering PLUS Promissory Note Data 7
Creating Loan Reference and Cosigner Relationships 9
Entering Alternative Loan Promissory Note Data 10
Tracking CommonLine Master Promissory Note Usage 12
Originating CommonLine Loans 13
Understanding the Loan Origination Process 13
Pages Used to Originate CommonLine Loans 18
Originating CommonLine Loans 18
Reviewing Loan Origination Information 19
Pages Used to Review Loan Origination Information 20
Updating Borrower Information 21
Updating Loan Demographic Data 24
Entering Loan Relationship Information 26
Reviewing Student Loan Eligibility 26
Managing FFELP Serial Loan Processing 29
Validating CommonLine Loans 33
Pages Used to Validate CommonLine Loans 33
Validating CRC Loans 34

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Validating CommonLine 4 Loans 34
Reviewing CommonLine Validation Edit Error Messages 34
Reviewing CommonLine Loan Status Information 35
Managing Loan Origination Transmission Data 39
Pages Used to Manage CommonLine Loan Origination Transmission Data 39
Viewing a Student's Originated Loans 40
Viewing Loan Application Summary 40
Viewing Loan Origination Information 40
Viewing Loan Origination Change 42
Viewing Loan Period Change 43
Overriding Loan Origination Transmission Data 43
Viewing Loan Disbursement Activity 45
Pages Used to View Loan Disbursement Activity 46
Reviewing Loan Disbursement Activity 47
Reviewing Loan Disbursement Actions 47
Reviewing Loan Disbursement Changes 48
Reviewing Cancelled and Reinstated Loans 48
Reviewing Loan Award Disbursement Information 49
Reviewing Loan Award Transmission Status 49
Processing CRC Loan Files 50
Pages Used to Process CRC Loan Files 50
Selecting Validated CRC Loan Records to Outbound 52
Creating CL 4 Loan Files 53
Pages Used to Create CL 4 Loan Files 53
Selecting Validated CL 4 Loan Files to Outbound 54
Generating CL 4 Loan Files to Transmit 54
Renaming CommonLine 4 Files 55
Reviewing and Managing CRC XML Files 55
Pages Used to Review and Manage CRC XML Files 55
Viewing CRC Loan File Transactions 56
Monitoring CRC Award Load Status 57
Reviewing and Managing CL 4 Loan Files 58
Page Used to Review and Manage CL 4 Loan Files 59
Viewing CL 4 EC Queue Records 59
Receiving and Processing CRC Inbound Files 61
Understanding CRC Disbursement Files 61
Pages Used to Receive and Process CRC Inbound Files 61
Loading CRC Inbound Files to Staging Tables 62
Viewing CRC Inbound Details 62
Processing CRC Inbound Files from Staging Tables to Application Tables 63
Receiving and Processing CL4 Inbound Files 64
Pages Used to Receive and Process CommonLine Inbound Files 64

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Loading CL 4 Inbound Files to Staging Tables 65
Viewing CL 4 Inbound Application Response Details 66
Viewing CL 4 Inbound EFT Details 68
Processing CL 4 Inbound Files from Staging Tables to Application Tables 68
Reviewing CL 4 Status and Phase Codes 68
Managing Loans on Hold 74
Pages Used to Manage Loans on Hold 74
Reviewing Loans on Hold 75
Reviewing Loan Origination and Loan Action Status 78
Reviewing Loan Disbursement Detail 79
Processing Loan Changes 79
Understanding Changes to Originated Loans 80
Pages Used to Process CommonLine Loan Changes 82
Changing Loan Dates and Student Grade Level 84
Changing Loan Period Start and End Dates 85
Changing the Student's Grade Level and Graduation Date 86
Generating and Viewing @1-07 Loan Adjustment Information 88
Processing Cancellations and Reinstatements 88
Processing Disbursement Level Changes 89
Processing Loan Increases 92
Processing Address, Phone, and Email Address Changes for CRC Loans 93
Creating Change Transaction Files 94
Receiving and Processing Change Application Response Files 94
Accepting Change Transactions Manually 95
Managing Disbursement Hold and Release Processing 95
Understanding the Hold/Release Process 95
Prerequisites 96
Pages Used to Manage the Hold/Release Process 97
Running the Set Hold/Release Process 97
Resolving Change Transaction Errors 98
Pages Used to Change Transaction Errors 98
Identifying Change Error Records 99
Reviewing Error Messages 99
Resolving Error Messages and Running Loan Adjustments 99
Processing School Certification Request Applications 100
Understanding School Certification Requests 100
Pages Used to Process Certification Requests 100
Processing Certification Requests for CRC 102
Processing School Certification Requests for CL4 104
Adjusting Loan Disbursements Manually 105
Pages Used to Adjust Loan Disbursements Manually 105

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Modifying Disbursements 105

37 Processing Direct Loans

Understanding Direct Lending 1
Viewing Packaging Results Before Origination 2
Page Used to Update School Codes 2
View Packaging Results 2
Update School Codes 3
Re-awarding Direct Loans with New Disbursement Plans 3
Originating Direct Loans and Viewing Loan Status Summary Information 4
Pages Used to Originate Direct Loans and Display Loan Status Summary Information 4
Originating Direct Loans 4
Viewing Loan Status Summary Information 6
Processing and Reviewing Direct Lending Origination Information 11
Pages Used to View Loan Change Transmission Information 11
Processing and Reviewing Borrower Bio/Demo Data 13
Processing and Reviewing Miscellaneous Borrower Data 16
Processing and Reviewing Financial Data 25
Processing and Reviewing Loan Application Acknowledgement Data 30
Viewing and Overriding Bio/Demo Data for Direct Lending 35
Pages Used to Override Bio/Demo Data for Direct Lending 35
Viewing Direct Loan Name Information 36
Overriding Direct Loan Phone Information 37
Viewing Direct Loan Address Information 38
Overriding Direct Loan Email Information 39
Overriding Direct Loan Application Information 39
Overriding PLUS Credit Decisions 40
Overriding Informed Borrower Information 41
Overriding and Viewing Direct Loan Origination Data and Action Messages 42
Pages Used to Override and View Direct Loan Origination Data and Action Messages 43
Overriding Direct Loan Origination Data 43
Viewing Direct Loan Origination Action Messages 47
Reviewing the Loan Origination Action History 48
Reviewing Direct Loan Disbursement Actions 55
Reviewing Direct Loan SULA Response 61
Reviewing Loan Exception Messages 62
Updating Loan Dates 62
Page Used to Update Loan Dates 62
Updating Loan Dates 63
Creating and Using Promissory Notes 65
Pages Used to Create and Use Promissory Notes 66

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Creating a Promissory Note Communication Record 67
Printing Direct Loan Master Promissory Notes 69
Signing and Reviewing Direct Loan Promissory Notes 70
Creating Batch Signatures for DL Promissory Notes 75
Viewing Promissory Note Action History and Loan Disbursement Messages 77
Page Used to View Promissory Note Action History and Loan Disbursement Messages 77
Viewing Promissory Note Action History 78
Viewing Loan Disbursement Messages 78
Processing Direct Loan Manifests 79
Pages Used to Process Direct Loan Manifests 79
Creating a Direct Loan Manifest 80
Editing a Direct Loan Manifest 80
Printing PLUS and Stafford Loan Manifests 81
Using EC Queue Status with Direct Loan Processing 82
Page Used to Review the EC Queue Status 82
Reviewing the EC Queue Status 82
Viewing Direct Loan EC History 83
Pages Used to View Direct Loan EC History 83
Entering Data to Review DL EC History 84
Processing Direct Lending Origination Changes 85
Page Used to Process Direct Lending Origination Changes 85
Setting Change Parameters for Direct Loan Origination Changes 85
Understanding Direct Lending Change Processing 86
Processing a Bio/Demo Change 86
Processing an Award Change 87
Processing a Rejected Origination Change 88
Managing Direct Lending Cash Transactions 89
Understanding Direct Lending Cash Management 89
Managing Direct Lending Cash Transactions 89
Entering Cash Summary Data 90
Page Used to Enter Cash Summary Data 90
Entering Institutional Data for Cash Transactions 90
Importing School Account Statement Data 92
Page Used to Load the SAS File 92
Loading the SAS File 92
Viewing School Account Statement Data 92
Pages Used to View Data Import Information 93
Importing the Loan Limit Exception Report 94
Viewing the Loan Limit Exception Report Data 94
Updating FA Term with Loan Limit Exception Report Data 94
Working with the DL School Account Statement and the DL Reconciliation Reports 95

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Pages Used to Generate DL School Account Statement and Reconciliation Loan Destination Reports 95
Generating the DL School Account Statement Report 95
Generating the DL Reconciliation Report 96
Running Direct Loan Reports 101
Pages Used to Run Direct Lending Reports 102
Using the Generic Run Control Page for Direct Lending Reports 104
Generating the Direct Lending Loan Booking Status Report 104
Using Demographic Data Selection for Loan Origination 104

38 Managing Loan Counseling

Managing Loan Counseling Data 1
Pages Used to Manage Loan Counseling Data 1
Viewing Loan Counseling Data 2
Adding Loan Counseling Data 5
Processing COD Loan Counseling Data 6
Managing Suspended COD Loan Counseling Records 9
Processing NSLDS Loan Exit Counseling Data 11
Managing Suspended NSLDS Loan Exit Counseling Records 12
Viewing NSLDS Loan Exit Counseling Staging Table Data 14

39 Processing Pell Payments

Understanding Pell Payment Processing 1
Pell Payment Processing 1
Pell Processing Action Codes 1
Creating Pell Origination Records 3
Page Used to Create Pell Origination Records 3
Generating Pell Origination Records 3
Managing Pell Origination 4
Pages Used to Manage Pell Origination 5
Reviewing Results of Pell Origination 5
Reviewing Pell Processing Status 11
Reviewing Pell Origination Action Detail 13
Viewing Pell Disbursement Data 14
Page Used to View Pell Disbursement Data 14
Reviewing Pell Disbursement Results 14
Changing Career Statuses 17
Understanding Changing Career Statuses 17
Page Used to Change Careers 17
Changing a Student's Career 17

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Selecting Pell Data Request Types 18
Understanding Pell Data Requests 18
Pages Used to Create Pell Data Request Types 19
Selecting Data Requests 19
Sending Pell Data Requests 20
Pages Used to Send Pell Data Requests 20
Selecting Outbound Pell Data Requests 21
Verifying Outbound Pell Data Requests 21
Pages Used to Verify Outbound Pell Data Requests 21
Reviewing Outbound Pell Data Requests 21
Generating Outbound Pell Data Requests 23
Page Used for Generating Outbound Pell Data Requests 23
Generate the Outbound Pell Data Request 23
Receiving Inbound Pell Data Requests 23
Pages Used to Receive Inbound Pell Data Requests 23
Loading Pell Acknowledgment Files 24
Moving a Pell Data Request to the Database 24
Verifying Inbound Pell Data Requests 24
Pages Used to Verify Inbound Pell Data Requests 25
Importing Pell Grant Reports 28
Pages Used to Import Pell Grant Reports 28
Importing and Reviewing Lifetime Eligibility Used (LEU) Files 29
Importing and Reviewing School Account Statement (SAS) and SAS Disbursement on Demand Files 30
Tracking Requests for Funds From GAPS 32
Pages Used to Track Requests for Funds From GAPS 32
Reviewing Requests for Funds From GAPS 32
Managing Item Type Detail 34
Entering Cash Transaction Notes 34

40 Using Perkins MPN Functionality

Understanding Perkins MPN Functionality 1
Determining a Valid Perkins MPN 1
Printing the Perkins MPN 2
Page Used to Print Perkins MPN 2
Printing the Perkins MPN 2
Tracking Perkins MPN Information 3
Understanding Tracking Perkins MPN Information 3
Pages Used to Track Perkins MPN Information 3
Viewing Perkins MPN Information 4
Reviewing and Entering Data 5

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Reviewing and Entering References 6
Viewing Perkins MPN Data 7
Pages Used to View Perkins Loan Information 7
Viewing Perkins MPN Loan Indebtedness Information 7
Viewing Perkins MPN Dates, History, and Repayment Schedules 9

41 Authorizing and Disbursing Financial Aid

Understanding Authorizing and Disbursing Financial Aid 1
Prerequisites 1
Authorization and Disbursement 1
Background Authorization and Disbursement 2
Online Authorization and Disbursement 2
Anticipated Aid 3
Service Impacts on Disbursement Authorization 3
Managing User Edit Messages 3
Pages Used to Assign User Edit Messages 4
Assigning User Edit Messages Manually 4
Assigning User Edit Messages in Batch 5
Running Background Authorization and Disbursement 8
Understanding Background Authorization and Disbursement 8
Common Elements Used in This Section 9
Pages Used to Run Background Authorization and Disbursement Processes 10
Authorizing Financial Aid in Batch 10
Disbursing Financial Aid in Batch 12
Disbursing Aid Manually 13
Pages Used to Disburse Aid Manually 14
Authorizing and Disbursing Aid Manually 14
Reviewing Authorization and Disbursement Failure Messages 16
Disbursing Aid with Overrides 17
Pages Used to Disburse Aid with Overrides 17
Authorizing and Disbursing Aid Using Overrides 17
Reviewing Authorization and Disbursement Results 19
Page Used to Review Authorization and Disbursement Results 19
Reviewing a Student's Authorization and Disbursement Activity 19
Reviewing Award Summary Information 20

42 (GBR) Using Student Loans Company

Common Elements Used in Student Loans Company 1
Importing SSAR Files 2
Understanding SSAR Files 2

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Page Used to Load SSAR Files 3
Loading SSAR Files 3
Managing SSAR Suspensions 3
Understanding SSAR Suspensions 4
Page Used to Review and Manage Unmatched or Unprocessed SSAR Data 4
Reviewing and Managing Unmatched or Unprocessed SSAR Data 4
Generating SSAC Data 6
Understanding SSAC Data 6
Pages Used to Generate SSAC Data 7
Adding SSAC Data Manually 7
Generating SSAC Data 8
Importing HEBSS Files 10
Understanding HEBSS Files 10
Page Used to Load HEBSS files 10
Loading HEBSS Files 10
Managing HEBSS Suspensions 11
Understanding HEBSS Suspensions 11
Page Used to Review and Manage Unmatched or Unprocessed HEBSS Data 11
Reviewing and Managing Unmatched or Unprocessed HEBSS Data 11
Importing ACR and SISF Files 13
Understanding ACR and SISF Files 13
Page Used to Load ACR and SISF Files 14
Loading ACR and SISF Files 14
Managing ACR and SISF Suspensions 15
Understanding ACR and SISF Suspensions 15
Page Used to Review and Manage Unmatched or Unprocessed ACR and SISF Data 15
Reviewing and Managing Unmatched or Unprocessed ACR and SISF Data 16
Running the ACR At Fee Evaluation Process 18
Understanding ACR At Fee Evaluation 18
Page Used to Calculate the At Fee Code for ACR Records 18
Calculating the At Fee Code for ACR Records 18
Running the Calculate FTE Process 19
Understanding the Calculate FTE Process 20
Page Used to Calculate FTE 20
Calculating FTE for SLC Reporting 20
Exporting the ACR Response File 22
Understanding the ACR Response File 22
Page Used to Export the ACR Response File 22
Exporting the ACR Response File 22
Importing Remittance Report Files 23
Understanding Remittance Report Files 24
Page Used to Load Remittance Report Files 24

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Loading Remittance Report Files 24
Viewing Remittance Staging Data 24
Page Used to View Remittance Imported Data 25
Viewing Remittance Imported Data 25
Viewing SLC Student Data 26
Pages Used to View Student Data 26
Viewing SSAR Student Data 27
Viewing SSAR Name and Address Data 28
Viewing SSAC Student Data 29
Viewing SSAC Export Data 30
Viewing ACR and SISF Student Data 31
Viewing Attendance Confirmation Data by Liability Period 33
Viewing HEBSS Student Data 34
Reconciling Tuition Fee Payments 36
Understanding Tuition Fee Payments Reconciliation 36
Pages Used to Reconcile Tuition Fee Payments 37
Viewing the Remittance Report File Summary 37
Viewing the Remittance Data to Student Award Data Comparison 38
Viewing Student Award Details 39
Viewing the FA Disbursement Data to SF Item Data Comparison 40
Viewing FA/SF Details 41
Updating HEI Course Database Data 41
Understanding the HEI Course Database 41
Page Used to Exchange HEI Course Database Data 42
Exchanging HEI Course Database Data 42
Maintaining HEI Data 43
Understanding HEI Data 43
Common Elements Used in this Section 44
Pages Used to View and Update HEI Data 44
Viewing and Updating HEI Institution Data 44
Viewing and Updating HEI Location Data 45
Viewing and Updating HEI Course Data 46

43 Processing Return of Title IV Funds

Common Elements Used in Processing Return of Title IV Funds 1
Managing Data to Calculate Return of Title IV Aid 1
Pages Used to Manage Data to Calculate Return of Title IV Aid 1
Managing Return of Title IV Aid Enrollment Session Data 2
Managing the Return of Title IV Aid 5
Using the Return of Funds Worksheet 9
Pages Used to Generate a Valid Calculation 10

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Generating a Valid Calculation 10
Recalculating TIV Aid Information 12
Recalculating Percentage of TIV Aid Earned Using Credit Hours 13
Viewing Institutional and Budget Charges 16
Calculating Return Amounts 17
Reviewing Loan Debts for Withdrawn Students 18
Reviewing Grant Funds for Withdrawn Students 18
Tracking Student and School Return Information 18
Pages Used to Track Student and School Return Information 18
Tracking Return Information 19
Tracking Post-Withdrawal Disbursement 21
Viewing Allocation of Post-Withdrawal Disbursements 22
Reviewing Post-Withdrawal Disbursements 23
Entering Return TIV Aid Notes 23
Tracking Return of Title IV Funds 24
Pages Used to Track Return of TIV Funds 24
Tracking Student Return of Title IV Funds 25
Tracking School Return of Title IV Funds 28
Reviewing Post-Withdrawal Disbursement Tracking Data 30
Reviewing Return of Title IV Funds Student Summary 34
Page Used to Review Return of TIV Funds Student Summary 34
Reviewing the Summary of Student Return of TIV Funds 34
Generating Return of Title IV Funds Withdrawal Report 38
Pages Used to Generate the Return of Title IV Aid Report 38
Generating Return of TIV Funds Report 38
Viewing Career Totals 40

44 Managing Work-Study

Understanding Work-Study 1
Managing Work-Study Jobs 1
Pages Used to Manage Work-Study Jobs 2
Assigning a Work-Study Job 3
Viewing a Student's Total Award Package 4
Viewing Earnings Summary 5
Viewing General Job Information, Work Location, and Compensation 5
Viewing Salary Components 7
Viewing the Student's Work History 8

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45 Using the Fiscal Operations Report and Application to Participate

Understanding the FISAP Report 1
- Students Selected for the Report 1
- Assessments and Expenditures 3
- Information on Eligible Aid Applicants 3
- Distribution of Program Recipients and Expenditures by Type of Student 4

Producing the FISAP Report 4
- Page Used to Produce the FISAP Report 4
- Generating the FISAP Report 5
- Using FISAP Queries 7

46 Using Common Origination and Disbursement

Overview and Setup for COD for Pell Grants and Direct Loans 1

Creating COD Files for Pell Grants and Direct Loans 2
- Page Used to Create COD Files 2
- Creating a COD File for Pell 2
- Creating a COD File for Direct Loans 4
- Processing COD Names and Addresses 6

Reviewing COD Data for Pell Grants and Direct Loans 6
- Common Elements Used in This Section 7
- Pages Used to Review COD Data 9
- Viewing COD Document Information 11
- Viewing Document Response Information 11
- Viewing COD School Information 11
- Viewing Reporting School Summary Information 12
- Viewing Reporting School Response 12
- Viewing Attended School Response 12
- Viewing Student Biographical and Demographic Information 12
- Viewing Student Address Information 13
- Viewing Student Phone Number Information 13
- Viewing Student Response Data 13
- Viewing a Student's Award Information 13
- Viewing Responses to Award Rejections and Corrections 14
- Viewing Additional Loan Information 14
- Viewing Loan Response Information 14
- Viewing Borrower Information 14
- Viewing Borrower Address Information 15
- Viewing Borrower Phone Number Information 15
- Viewing Borrower Response Data 15
- Viewing Disbursement Information 15

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Viewing Responses to Disbursement Rejections and Corrections 15
Loading COD XML Files for Pell Grants and Direct Loans 16
Page Used to Load COD XML Files 16
Loading a COD XML File 16
Submitting Documents for Pell Grants and Direct Loans 16
Overview and Setup for COD for Federal Work-Study Earnings Reporting 17
Pages Used to Setup FWS Earnings Reporting 17
Setup Equation Data Tables 17
Setup Equation Table Authorizations 18
Managing COD Federal Work-Study Earnings Data 18
Pages Used to Manage FWS Earnings Reporting Data 18
Run File Parser to Load FWS Earnings Data 19
Manually Enter or Update FWS Earnings Data 21
Generate FWS Earnings Reporting Files 21
Importing FWS Response Data 22
Viewing FWS Response Data 22
Using Common Origination Message Classes 23

47 Using Forms Engine

Using the Components of Forms Engine 1
Pages Used with the Forms Engine Components 1
Using the Application Designer 2
Creating and Modifying Forms 2
Using the Form Image Text Repository 3
Uploading Form Image Text 3
Reviewing Form Groups 4
Using Output Destination Formats 4
Specifying Font Names 4
Using PostScript Fonts 5
Using the Inquire On Form Data Page 5
Purging Form Data 5
Modifying a Form 5
Adding Data to the Form Data Tables 6
Setting Up Images 6
Setting Up a Background Image 7
Setting Up a Foreground Image 7
Changing a Logo 7

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48 Using Financial Aid Web Services

Understanding Financial Aid Web Services 1
Using the SFA_FINANCIAL_AID Web Service 2
- Entity Registry 2
- Description Language 2
- Service Operations 2
- Setting Up the SFA_FINANCIAL_AID Web Service 3

Using SFA_FINANCIAL_AID Service Operations 3
- Using the SOAP Get Student Awards Service Operation 3

Post Installation Troubleshooting 27
- Verifying Web Service Security Settings 27
- Publishing the Web Services 28

49 (CAN) Using Canadian Financial Aid Applications and Canadian Need Analysis

Understanding Using CNAS 1
Defining the CNAS File Load Parameters 1
- Page Used to Define the CNAS File Load Parameters 1
- Defining Data Load Parameters 1

Loading and Viewing CNAS Data 2
- Pages Used to Load and View CNAS Data 2
- Loading CNAS Data 3
- Viewing CNAS Load Results 1 3
- Viewing CNAS Load Results 2 5

Managing CNAS Suspense 6
- Pages Used to Manage CNAS Suspense 6
- Reviewing CNAS Suspense 6
- Processing CNAS Suspense 7

Adding an Application Source Code for Canadian Applications 7
- Page Used to Add an Application Source Code 7
- Adding an Application Source Code 8

Maintaining Full-Time Student Data 8
- Common Elements Used in This Section 8
- Pages Used to Maintain Full-Time Student Data 9
- Entering Student Personal Information 10
- Overriding Institutional CNAS Options 11
- Entering Student Family Status and Residency Information 12
- Entering Student Study Period Information 14
- Entering Student Financial Data 15
- Entering Parent Data 17

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Entering Spouse Information 19
Entering Signature and Next of Kin Information 20
Maintaining Part-Time Student Data 21
Common Elements Used in This Section 21
Pages Used to Maintain Part-Time Student Data 22
Entering Student and Dependency Information 22
Entering Student and Spouse Financial Information 24
Entering Study Period Information 25
Reviewing CNAS Calculation Results 26
Pages Used to Review CNAS Calculation Results 26
Viewing Results of CNAS Calculation 1 26
Viewing Results of CNAS Calculation 2 27
Viewing Results of CNAS Calculation 3 28
Viewing Audits 29
Pages Used to View Audits 29
Viewing Changes Made to Applications 29
Viewing Changes Made to Extension Data 30
Inserting an ISIR Row 30
Page Used to Insert an ISIR Row 30
Create ISIR Records for Mass Packaging 30

50 Financial Aid Reports

Financial Aid Reports: A to Z 1

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see Understanding Locally Installed PeopleSoft Online Help.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The three main types of common help are:

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- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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Typographical Convention	Description
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region, Country, and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following are examples of region identifiers that may appear in PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

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Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft CS Related Links

Hosted Online Help Home

PeopleSoft Information Portal

My Oracle Support

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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1

Getting Started with Financial Aid

Financial Aid Overview

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

Financial Aid automates federal and institutional financial aid processing for a more efficient operation. It provides flexibility and helps you manage financial aid activity for applicants and students.

With this application, you can:

- Receive and track financial aid applications.
- Design cost of attendance assessment by defining budget categories, items, and formulas.
- Manage need analysis, packaging, disbursement, and loan processing.
- Process origination and disbursement for FFELP, Direct Loan, and Pell Grant programs.
- Calculate federal Pell awards.
- Use award plans to automatically package students.
- Match financial aid sources to eligible students.
- Modify financial aid notification letters.
- Maintain federal compliance with annual regulatory updates for ISIR, Pell, Direct Loan, FISAP, and other federal updates.
- Post financial aid to student accounts.
- Provide students with self-service access to view, accept, and decline awards.
- Manage student work-study programs.

Financial Aid Business Processes

Financial Aid supports local management and awarding of federal aid, state aid, institutional aid, departmental aid, and scholarship funds. After you set up the system based on your institution's rules and practices, you can begin to receive and track financial aid applications. The awarding practice takes place when your institution receives the ISIR, PROFILE, or institutional application. After you load need analysis data, the system activates the student for the aid year. Activation of the aid year is the first step in updating student data for financial aid processing.

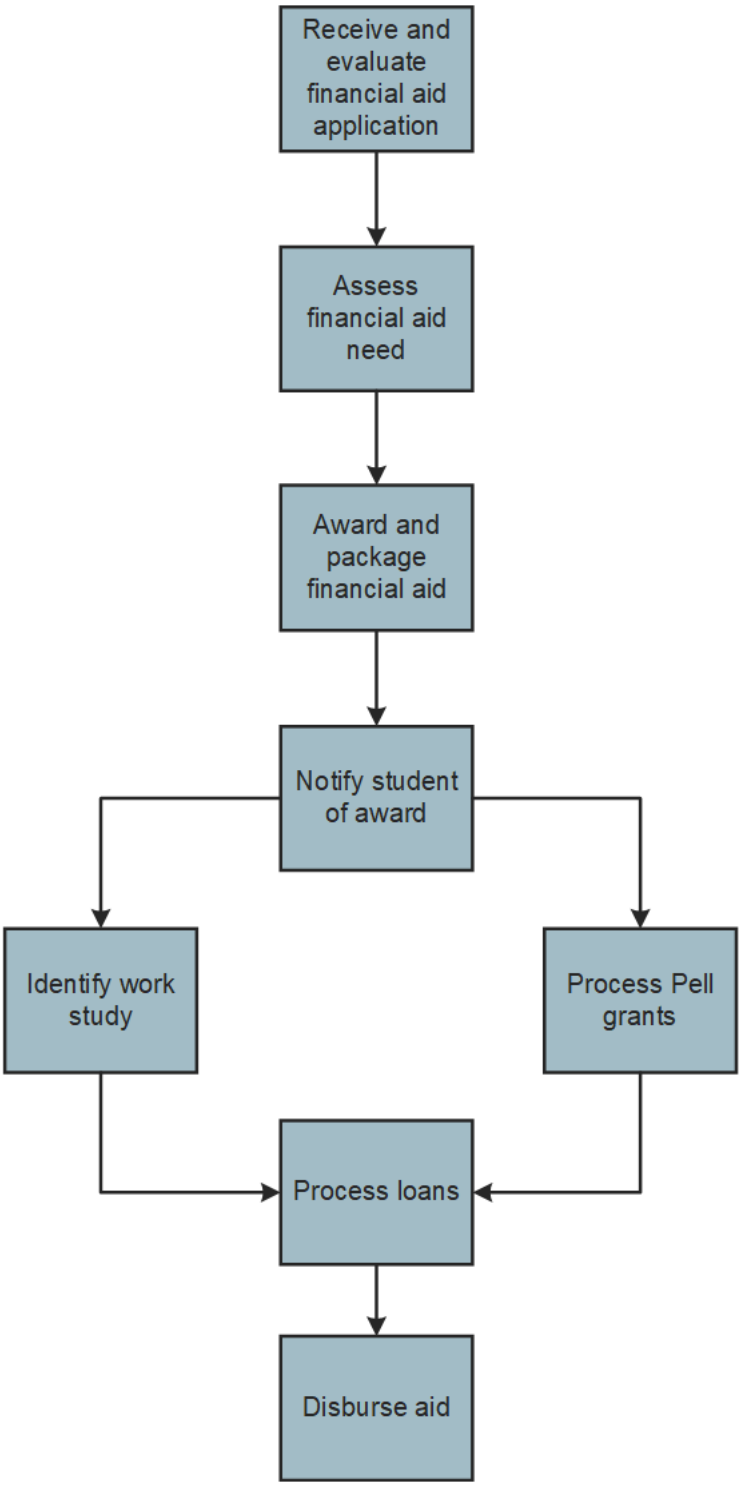
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You can manually award a student or use award plans to automatically package a student. The Packaging process finds the best combination of aid to meet a student's financial need. Disbursing aid to students involves authorizing each disbursement. The system checks the disbursement rules that you have defined and determines whether a particular award can be disbursed. For the aid cycle to be successful, you must verify selected students, handle ISIR corrections, process budgets, track requested documents and loan applications, and monitor spending and reconciliation of funds.

The following process flow illustrates the Financial Aid business process:

Financial Aid Business Process

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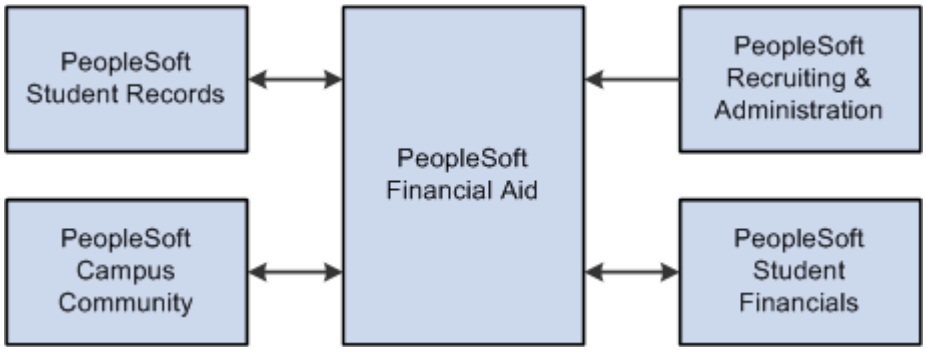


Financial Aid Integrations

Financial Aid integrates with the following applications within PeopleSoft Campus Solutions:

Financial Aid Integrations

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PeopleSoft Campus Community

Financial Aid integrates with Campus Community to receive personal, demographic, and relationship data.

PeopleSoft Student Records

Financial Aid integrates with Student Records to create financial aid term data to determine financial aid eligibility.

PeopleSoft Recruiting and Admissions

Financial Aid integrates with Recruiting and Admissions to create prospect data and provide early financial aid offers.

PeopleSoft Student Financials

Financial Aid integrates with Student Financials to manage financial aid and track student disbursements, charges, and payments.

Financial Aid Implementation

Financial Aid enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleSoft documentation.

Financial Aid also provides component interfaces to help you load data from your existing system into Financial Aid tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have setup component interfaces:

Component	Component Interface	References
AGGR_AID_TBL	SFAA_AGGR_AID_TBL	See Setting Up Aggregate Aid.
AID_YEAR_CAR_TERM	SFAG_AID_YR_CAR_TERM	See Defining Valid Terms for Careers.
AWARD_MESSAGES	SFAA_AWARD_MESSAGES	See Setting Up Award Messages.
BUDGET_GROUP_TABLE	SFAB_BUDGET_GROUP_TABLE	See Creating Budget Groups.
BUDGET_ITEM_TABLE	SFAB_BUDGET_ITEM_TABLE	See Defining Budget Items.

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Component	Component Interface	References
FINANCIAL_AID_ITEM	SFAG_FINANCIAL_AID_ITEM	See Defining Financial Aid Item Types.
TIV_SCHOOL_CODE_TBL	SFA_TIV_SCHOOL_CODE	See Defining Your School Code.

The following is a list of tasks that you should complete as part of setting up your financial aid system:

- Design your financial aid awarding cycle. Decide how you want to implement your operational structure, awarding practices, and institutional procedures to work with your system.
- Associate the financial aid year with your school code and identify all possible careers for each aid year and school code.
- Specify which academic careers qualify for financial aid and set up the terms for each financial aid career.
- Establish general financial aid processing defaults on the Financial Aid Defaults page. Default values can remain the same for many aid years and apply to students regardless of their career.
- Assign the appropriate rule sets for need analysis calculations and financial aid processing.
- Set up level/load rules with the student records staff. Set up and build financial aid terms.
- Set up student budgets. Create budget categories and budget items within each category. Use budget formulas and budget trees to set eligibility criteria for each budget item.
- Set up global application processing options.
- Set up financial aid item types and define packaging and awarding rules.
- Set up processing options for all loans awarded to your students by your institution.
- Define Pell installation defaults, Pell institution identification, and payment information.
- Establish disbursement rules.
- Define which financial aid item types are used for Return of Title IV Fund calculations.
- Set up self-service options.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft resources of information, including the installation documentation, data models, business process maps, and troubleshooting guidelines.

See *PeopleTools: Setup Manager*

Additional Information for Getting Started with Financial Aid

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation: Campus Solutions Application Fundamentals documentation and Campus Community Fundamentals documentation.

See Campus Solutions Application Fundamentals: Campus Solutions Overview.

See Campus Community Fundamentals: Campus Community Overview.

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For information about deferred processing, see Campus Solutions Application Fundamentals: Additional Information for Getting Started with Campus Solutions.

Common Elements Used in Financial Aid

Term	Definition
Academic Career	Designates all course work undertaken by a student at your academic institution that you group together in a single student record. For example, a university that has an undergraduate school, a graduate school, and several professional schools can define an undergraduate career, graduate career, and a separate career for each professional school.
Academic Institution	A separate entity, such as a university or college, that runs independently from other like entities and has its own set of rules and business processes. Throughout your student administration system you use Academic Institution as a key value to group data into tables and search against those tables to extract data.
Academic Plan	An area or areas of study that a student declares after the student is admitted to an academic program. Academic plans are linked to academic careers or academic programs.
Academic Program	The entity to which a student applies, is admitted, and ultimately graduates. Rules such as academic standing, honors/awards, and repeats are attached at the academic program level.
Academic Sub-plan	Academic subplans can be defined as minors, concentrations, or specializations. They are directly linked to an academic plan.
Academic Year	The period of time you define as one school year.
Aid Year	Used in Financial Aid to designate a year of accounting for financial aid awarding.
Career	See *Academic Career*.
Institution	See *Academic Institution*.
Item Type	Identifier that classifies an item on a customer's account. Item types enable schools to uniquely categorize a customer's bill.

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2

Setting Up Your Financial Aid Awarding Cycle

Understanding the Financial Aid Awarding Cycle

The financial aid awarding cycle is a set of recurrent operations used by institutions when they process and manage student data to evaluate, award, and disburse federal, state, institutional, and private funding. The typical financial aid processing cycle may encompass multiple academic years. Institutions process continuing students for the current aid year and, at the same time, process applications for the upcoming aid year.

One of the first steps in setting up your awarding cycle is to define the boundaries of each financial aid year to maintain separate and unique financial aid years throughout a student's educational career. In addition to setting up the aid year, your institution must associate the financial aid year with your school code or codes and identify all possible careers for each aid year and school code. School codes are defined by the U.S. Department of Education and are used to track a student's aggregate aid history. An institution might have separate school codes for a medical school and a law school. Because school codes do not share careers, you must link each school code and academic career separately.

You must specify which academic careers qualify for financial aid and set up valid terms for each financial aid career. Doing so provides the general guidelines to award and process aid within the award year. For example, your institution might have an evening degree program that does not award financial aid or offer financial aid for all of its academic terms.

The actual Awarding process takes place when your institution receives the first Institutional Student Information Records (ISIRs), PROFILE, or institutional application. The ISIR is the need analysis from the Department of Education to establish a student's need for financial aid. PROFILE is the need analysis form the College Board. Institutional applications are institution-specific need analysis forms. For new students, awards are made and notifications are sent on an ongoing basis up to the beginning and sometimes well into the award year for which the students are admitted. For continuing students, the goal is to mail notifications before the close of the academic year. The financial aid process of awarding entails need analysis and, for continuing students, checking academic progress.

In addition to the awarding cycle, the following processes must occur in the financial aid office for each aid cycle:

- Loading ISIRs and PROFILE applicant data.
- Entering institutional application information.
- Verifying selected students.
- Handling ISIR corrections.
- Processing budgets for the current and upcoming award years.
- Tracking requested documents and loan applications.
- Monitoring all spending and reconciliation of funds.
- Managing origination and disbursement of Title IV/Campus Based programs.
- Providing ongoing loan entrance and exit counseling.

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- Defining aid year rollover.

Prerequisites

Before implementing the Financial Aid system, examine how your financial aid office and your institution function. To take advantage of the flexibility of the PeopleSoft Campus Solutions system, decide how you want to implement your operational structure, awarding practices, and institutional procedures within the Financial Aid system.

When you prepare to set up the Financial Aid system:

- Decide what data elements you want converted for use in your new system if you are moving from a legacy system.
- Identify and decide which academic careers are valid for awarding and processing of financial aid after you establish your institution's academic structure.

  The creation and design of academic careers is carried out primarily by the staff that operates PeopleSoft Student Records.

  See Creating Aid Processing Rule Sets.
- Identify which terms and sessions are valid for awarding and processing of financial aid after you establish your institution's academic structure.

  The design and creation of terms and sessions is carried out primarily by the staff that operates Student Records.

  See Campus Solutions Application Fundamentals: Defining Term Values

  See Campus Solutions Application Fundamentals: Setting Up Time Periods

  See Campus Solutions Application Fundamentals: Defining Enrollment Action Reasons

  See Campus Solutions Application Fundamentals: Defining Terms, Sessions, and Session Time Periods
- Determine all aspects that need to be considered for the setup process.

  Consider your institutional and financial aid office needs in broad terms. This plan should include such items as your term structure, the Title IV school codes for your institution, your packaging policies, your disbursement patterns, financial aid fund information, and any business practices that are unique to your institution.

Establishing Aid Years

To set up aid years, use the Define Federal Aid Years (FED_AID_YR_TBL) and Define Financial Aid Years (AID_YEAR_TABLE) components.

This section discusses how to:

- Define federal aid years.
- Associate federal aid years with academic years.

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Pages Used to Establish Aid Years

Page Name	Definition Name	Navigation	Usage
Federal Aid Year Setup	FED_AID_YR_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Define Federal Aid Year**, and then **Federal Aid Year Setup**	Set up the Federal Aid Year table.
Financial Aid Year	AID_YEAR_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Define Financial Aid Years**, and then **Financial Aid Year**	Associate a valid federal aid year with the academic year of your institution.

Defining Federal Aid Years

Access the Federal Aid Year Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Define Federal Aid Year**, and then **Federal Aid Year Setup**).

This example illustrates the fields and controls on the Federal Aid Year Setup page. You can find definitions for the fields and controls later on this page.



This table defines the aid year according to the standards set by the U.S. Department of Education. You must define all aid years that you are processing in this table.

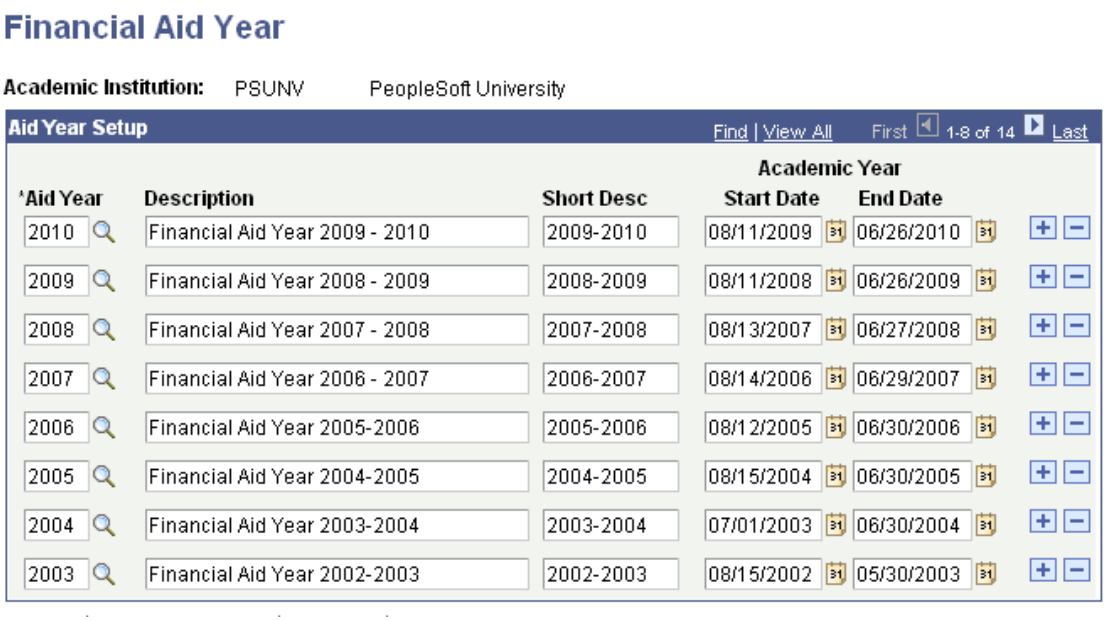
Enter the days that the aid year begins and ends.

Associating Federal Aid Years with Academic Years

Access the Financial Aid Year page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Define Financial Aid Years**, and then **Financial Aid Year**).

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



Field or Control	Description
Aid Year	Select the federal aid year to be associated with your academic year start and end dates.
Academic Year Start Date and **Academic Year End Date**	Enter the dates that your institution's academic year begins and ends. Academic year start and end dates are reported on the origination record to the Common Origination and Disbursement (COD) system.

Setting Up Your School Codes

To set up school codes, use the School Code Table (TIV_SCHOOL_CODE), Campus OPEID (SFA_COD_CAMP_OPEID), and School Codes for Institutions (INST_SCHOOL_CDS1) components.

A school code is assigned to each institution participating with the Department of Education and is used as an identification code during Electronic Data Exchange (EDE). In addition to its use in EDE processing, the Title IV school code is used to track a student's aggregate aid history.

This section discusses how to:

- Define your school code.
- Define your Campus OPEID codes.
- Associate federal aid years with an aid year.

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Pages Used to Set Up School Codes

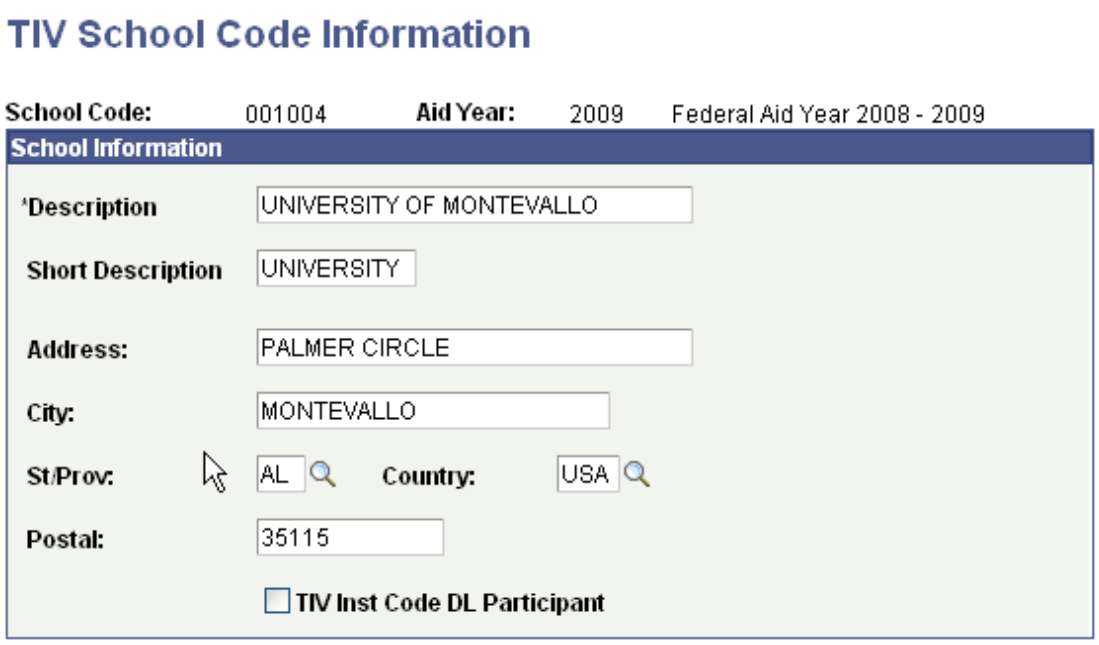
Page Name	Definition Name	Navigation	Usage
TIV School Code Information (Title IV school code information)	TIV_SCHOOL_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **School Code Table**, and then **TIV School Code Information**	Review the Title IV School Code Table and enter a description and address information for your school code.
Campus OPEID	SFA_COD_CAMP_OPEID	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Campus OPEID Codes**, and then **COD Campus OPEID**, and then **Campus OPEID**	Use this page to setup campus OPEID codes and defaults.
School Codes for Institution	INST_SCHOOL_CDS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **School Codes for Institution**, and then **School Codes for Institution**	Link an aid year with the Department of Education Title IV school codes for your institution.

Defining Your School Code

Access the TIV School Code Information page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **School Code Table**, and then **TIV School Code Information**).

This example illustrates the fields and controls on the TIV School Code Information page. You can find definitions for the fields and controls later on this page.

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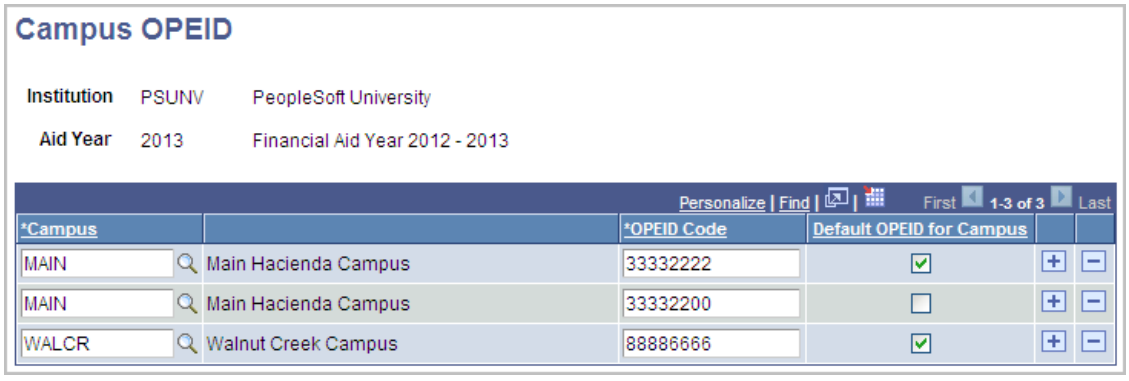
You can add or correct information on this page if the U.S. Department of Education has made an error or omission in the description or address information for your institution.

Field or Control	Description
Title IV Inst Code DL Participant (Title IV institution code direct loan participant)	Select if your institution participates in the federal Direct Lending Program. No processing is associated with this field.

Defining Your Campus OPEID Codes

Access the OPEID Codes page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Campus OPEID Codes**, and then **COD Campus OPEID**, and then **Campus OPEID**).

This example illustrates the fields and controls on the Campus OPEID page.



Use this page to set up campus OPEID codes for campuses and designate default codes.

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COD requires schools to report a student's physical campus of attendance as the Enrollment School Code using the 8 digit OPEID codes assigned to your institution. You may enter as many unique combinations as is required to support your processing. However only one unique **Campus** and **OPEID Code** combination can be designated as the default for COD disbursement use. COD processing uses Campus OPEID setup and the **Campus** field on a student's Financial Aid Term record to determine what **OPEID Code** should be reported to COD as the Enrollment School Code. The Enrollment School Code is maintained at an individual disbursement level and can be overridden for an individual student on the student's COD Origination record. Once an actual disbursement has been reported to COD, the field is no longer be available for override.

The Enrollment School Code can also be updated on both the Loan and Pell origination disbursement records with the Population Update process.

See Reviewing Pell Disbursement Results.

See Viewing Loan Status Summary Information.

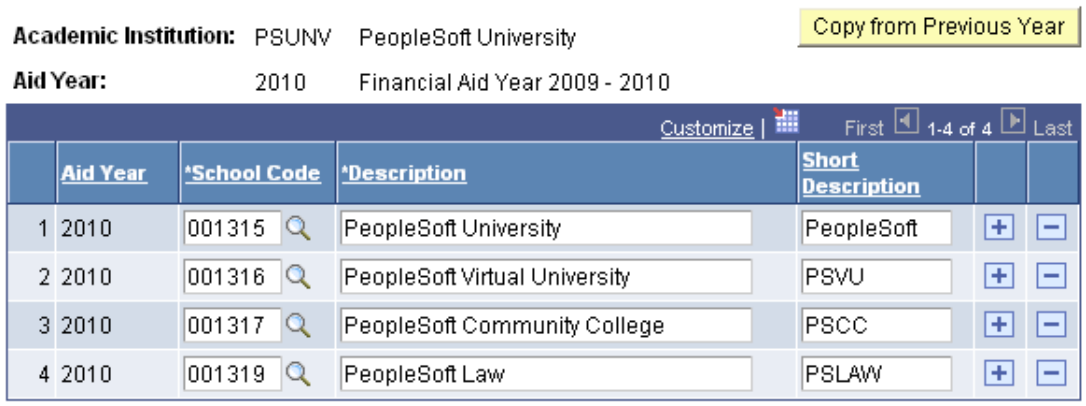
See Campus Community Fundamentals: Using the Population Selection Process.

Field or Control	Description
Campus	Select a campus to assign an OPEID Code to.
OPEID Code	Enter the OPEID code for the selected campus.
Default OPEID Code	Check this box if you want the this **Campus** and **OPEID Code** combination to be the default value used for this campus in COD processing.

Associating School Codes with an Aid Year

Access the School Codes for Institution page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **School Codes for Institution**, and then **School Codes for Institution**).

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



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Field or Control	Description
School Code	Select the school code that you want to associate with the displayed aid year. If your institution has more than one school code, you can add rows and enter as many school codes as you need.
Copy from Previous Year	Click to copy the school codes entered for the previous aid year to the current aid year. This process overrides any information that you have entered for the current aid year.

Establishing Defaults

To set up defaults for Classic and Fluid interfaces, use the Installation Defaults (INSTALLATION_FA) and Aid Processing Rule Setup (FA_DFLT_RULE_SET) components.

This section provides an overview of defaults and discusses how to:

- Define installation level defaults.
- Create aid processing rule sets.
- Link aid processing rule sets to careers and programs.

Understanding Defaults

Many of the setup pages in the Financial Aid system are specific to an aid year or a career. However, the various processes in the system use certain general financial aid processing values as default values. These default values remain the same for many aid years and apply to students regardless of their career. Therefore, these defaults are established on one page, the Financial Aid Defaults page, which is not keyed by aid year or career, and are applied to all institutions in your system. When you establish your installation defaults, select the values that represent the majority of your institutions, careers, and programs.

Financial Aid provides additional flexibility in creating aid processing defaults. If certain careers or programs require default values that vary from the installation defaults, you can establish aid processing rule sets at either a career-specific or program-specific level to define alternate values for selected defaults. These default options include:

- Academic and nonstandard base weeks.
- Pell Grant eligibility calculation criteria.
- Gap financial aid item types.
- Packaging data source defaults.
- Institutional application source.
- Pell number of terms.

The aid processing rule set can then be associated with the career that varies from the installation defaults, or the program that varies from both the career and installation defaults.

Set up aid processing rule sets only for those combinations of aid year and career that differ from each other and from your installation defaults and for those combinations of aid year and program that differ from each other, from the associated career level defaults, and from your installation defaults.

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Associate these rule sets with the appropriate aid year and career combination on the Valid Careers for Aid Year page or with the appropriate aid year and program combination on the Valid Programs for Aid Year and Career page. If a career or program does not vary from the installation defaults, you *do not* need to establish and assign an aid processing rule set for that career or program.

> **Note**
>
> If no careers or programs differ from the installation defaults, you do not need to create aid processing rule sets, and you can leave the **Aid Processing Rule Set** column blank on both the Valid Careers for Aid Year and Valid Programs for Aid Year and Career pages.

Because the default aid processing rules for an individual student can be defined at the program, career, or installation level, various financial aid processes check for defaults in the following order to ensure that the correct aid processing rules are used:

1. Aid processing rule set associated with the student's program.
2. Aid processing rule set associated with the student's career.
3. Installation defaults specified on the Financial Aid Defaults page.

Pages Used to Establish Defaults

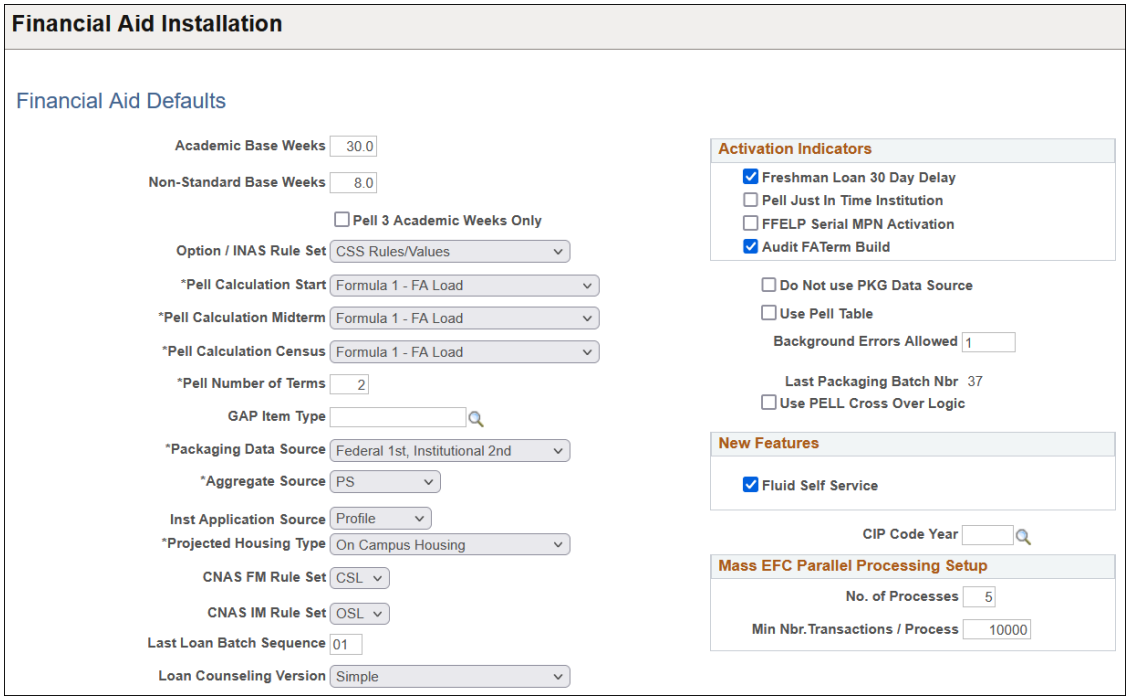
Page Name	Definition Name	Navigation	Usage
Financial Aid Defaults	INSTALLATION_FA	**Set Up SACR**, and then **Install**, and then **Financial Aid Installation**, and then **Financial Aid Defaults**	Define general financial aid processing defaults at the installation level.
Aid Processing Rule Setup	FA_DFLT_RULE_SET	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Processing Rule Setup**	Create aid processing rule sets that you can use to define defaults at the career and program level that differ from the installation default values.

Defining Installation Level Defaults

Access the Financial Aid Defaults page (**Set Up SACR**, and then **Install**, and then **Financial Aid Installation**, and then **Financial Aid Defaults**).

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

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Field or Control	Description
Academic Base Weeks	Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated Expected Family Contribution (EFC)/Student Aid Index (SAI). Valid values are 0.0 to 99.9.
Non-Standard Base Weeks	Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions. Valid values are 0.0 to 99.9.
Pell 3 Academic Weeks Only	Select so the Pell Grant calculation uses only Academic Base Weeks as the Academic Program's Weeks of Instruction for Formula 3. If not selected, the Pell Grant calculation sums the Academic Base Weeks and Non-Standard Base Weeks together to determine the Academic Program's Weeks of Instruction. **Note:** Academic Base Weeks and Non-Standard-Base Weeks are added together to determine an Academic Program's Weeks of Instruction. This Weeks of Instruction value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term when calculating Pell Grant eligibility for Formula 3— FA Load, Formula 3—Current Load, and Formula 3 — Full-time Load.

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Field or Control	Description
Option Rule Set	Select an **Option Rule Set** to define need analysis calculation options for your student population that do not have an academic career specified in the Financial Aid Term record or in the Student Career Term table. You can use a different rule set for any career or program by establishing a relationship between the career and rule set on the Valid Careers for Aid Year page (AID_YEAR_CAREER) or the program and rule set on the Valid Programs for Aid Year and Career page (AID_YEAR_PROGRAM). The **Option Rule Set** value provides full flexibility to determine how need analysis is performed. You load the **Option Rule Set** table into the system by using a data mover script that is delivered to your institution each year in a regulatory release. Select the **Option Rule Set** from these values: *CSS Rules*, *Health Pro* (health professional), or *Ugrd/Grad* (undergraduate/graduate). The **Option Rule Set**s are delivered as translate values and should not be changed or altered in any way. You can create additional **Option Rule Set**s for your institution by creating additional translate values.

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Field or Control	Description
Pell Calculation Start	Enter the option to use for Pell calculations made before the student's academic term start date. Values are: *Enrollment Current Load (For use only with 2009 and prior Aid Years):* Directs the Pell calculation to use the **Current Load** value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The **Current Load** value uses the number of units that the student is currently enrolled in, plus the number of units from already completed sessions in the term to determine the student's load for the term. *Enrollment FA Load (For use only with 2009 and prior Aid Years):* Directs the Pell calculation to use the **FA Load** value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The **FA Load** value uses the number of financial aid eligible units that the student is enrolled in for the term to determine the student's load. *Formula 1 — FA Load (For use only with 2010 and future Aid Years):* Directs the Pell calculation to divide the Pell Grant award by the **Pell Number of Terms** and uses the student's actual FA Load for each term. *Formula 1 — Full-time (For use only with 2010 and future Aid Years):*Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses Full-time as the student's FA Load for each term. *Formula 3 — Current Load (For use only with 2010 and future Aid Years):* Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the **Current Load** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The **Current Load** value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term. *Formula 3 — FA Load (For use only with 2010 and future Aid Years):* Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the

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Field or Control	Description
	denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the **FA Load** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The **FA Load** value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load. *Formula 3 — Full-time Load (For use only with 2010 and future Aid Years):* Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility. *Full Time (For use only with 2009 and prior Aid Years):* Directs the Pell calculation to always use the full time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant regardless of the student's enrollment. *Half Time (For use only with 2009 and prior Aid Years):* Directs the Pell calculation to always use the half time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant, regardless of the student's enrollment.
Pell Calculation Midterm	Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.
Pell Calculation Census	Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.
Pell Number of Terms	Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using the *Formula 1 - FA Load,* **Formula 1 - Full-time,** *Full Time,* or *Half Time* Pell calculation values. If you select *Formula 1 — FA Load* or *Formula 1 — Full-time,* you must populate the **Pell Number of Terms** field.

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Field or Control	Description
Gap Item Type	Select the gap financial aid item type that you created for this instance. Gap is an artificial figure that instructs Packaging to set aside an amount of unmet need to be funded later. It prevents full funding to any student to conserve funds or to provide room to award other types of aid in the future. The gap financial aid item type that you enter here is used when you assign a gap packaging rule in a packaging plan. See Defining Gap Financial Aid Item Types.
Packaging Data Source	Select which application data to use when packaging a student for financial aid. The system also tells the Equation processor which application data to gather for use in equations. *Fed Only* (federal only): This is the default value that instructs Packaging to gather data from the ISIR_** records. When *Fed Only* is selected, students are packaged only if they have federal application data (ISIR) available. If *Fed Only* is selected and the student has no ISIR data, the student is *not* packaged and the following error message is displayed during packaging: *Student has no ISIR data.* *Fed, Inst* (federal, institutional): Instructs Packaging to gather federal application data (ISIR) if available. Otherwise, Packaging gathers institutional application data (PROFILE). If neither federal nor institutional application data exists for the student, the student is *not* packaged and the following error message is displayed during packaging: *Student has neither ISIR nor Institutional data.* *Inst Only* (institutional only): Instructs Packaging to gather data from the INST_** records. When *Inst Only* is selected, students are packaged only if they have institutional application data (PROFILE or institutional application) available. If *Inst Only* is selected and the student has no PROFILE data, the student is *not* packaged and the following error message is displayed during packaging: *Student has no Institutional data.* *Inst, Fed* (institutional, federal): Instructs Packaging to gather institutional application data (PROFILE, or institutional application) if available. Otherwise, Packaging gathers federal application data (ISIR). If neither institutional nor federal application data exists for the student, the student is not packaged and the following error message is displayed during packaging: *Student has neither ISIR nor Institutional data.*

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Field or Control	Description
Aggregate Source	Select the source for aggregate lifetime totals that Packaging should reference when determining lifetime limits. Values are: *NSLDS:* Packaging uses National Student Loan Data System (NSLDS) aggregate history totals that have been pushed into the aggregate tables for packaging. *PS:* This is the default value. Packaging uses the existing undergraduate and graduate totals currently maintained by the institution on the aggregate tables for packaging. **Note: Aggregate Source** is set either at the installation default level or individually for each student on the Packaging Status Summary or award page components.
Inst Application Source (institutional application source)	Enter the institutional application used when you select *Fed, Inst, Inst Only,* or *Inst, Fed* as the Packaging Data Source. You can select *Inst App* (institutional application), or *Profile.*
Projected Housing Type	Select a default Projected Housing Type for students who don't not respond to the school's request for Housing Type. Beginning with the 2024-2025 Aid Year, Housing Type isn't reported by the student using the FAFSA. The list of values is the same used in FAFSA/ISIR for 2023-2024 Aid Year. For more information, see Student Planned Housing Type for the 2024-2025 and Future Aid Years (Doc ID 2990217.1) at https://support.oracle.com.
CNAS FM Rule Set (Canadian need analysis system federal methodology rule set)	Enter the rule set that defines the CNAS calculation guidelines that use federal methodology.
CNAS IM Rule Set (Canadian need analysis system institutional methodology rule set)	Enter the rule set that defines the CNAS calculation guidelines that uses institutional methodology.
Last Loan Batch Sequence	Enter a new sequence number of the last loan batch ID code processed. The system automatically updates this field each time a CommonLine or Direct Loan transaction file is created. You may need to update this if a conflict occurs.

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Field or Control	Description
Loan Counseling Version	Select the **Loan Counseling Version** for use throughout the system. This selection controls what components of Loan Counseling are available and how Authorization and Disbursement processing evaluates loan counseling requirements to release funds for disbursement. This selection also controls how loan counseling is displayed on the Packaging Status Summary page. • *Simple:* Select to limit the management of loan counseling to annual evaluation and processing. This is the default value. • *Expanded:* Select to enable multiple loan counseling setup options: annual, multiple aid year, and student self-service,
Do Not Use PKG Data Source (do not use a packaging data source)	Select this check box to have the system not check for either an existing federal application (ISIR) or an institutional application (such as PROFILE) when accessing the Award Entry component. Clear this check box to have the system check for the existence of either a federal application or an institutional application when accessing the Award Entry component. If the student doesn't have either application, a warning message appears.
Use Pell Table	If selected, the system uses the Pell Table Enablement program (FAPPKPTE) to calculate Pell awards (applies to Aid Year 2016 and forward). Electing to use the Pell Table Enablement program implies downloading of the Pell Grant Payment and Disbursement Schedules from the Department of Education, and loading them into the system for Packaging to use to evaluate your students for Pell grant eligibility. If not selected, the system uses the old Pell Program (FAPPKPEL) to calculate Pell awards. **Note:** To calculate Pell grants for Aid Years 2016 and 2017 (Award Years 2015-2016 and 2016-2017), Oracle supports both the current Pell Program FAPPKPEL delivered as a Critical Update, and the new Pell Table Enablement feature (FAPPKPTE). Beginning with Aid Year 2018 (2017-2018), Oracle plans to discontinue the old Pell Program (FAPPKPEL) and support only the Pell Table Enablement program to calculate Pell grants.
Background Errors Allowed	Enter the number of background errors that your institution wants to allow during background processing before the system terminates the run. You may want to set this field to a number greater than one. If you do not increase this value, background processing stops after encountering only one error.

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Field or Control	Description
Last Packaging Batch Nbr (last packaging batch number)	Displays the number that the system generates when you run the Mass Packaging process.
Use PELL Crossover Logic	Select this check box if you want the system to a check the summer/crossover term to determine if a Pell Grant award for that term would be higher if it is awarded using the *Additional* Pell Item Type for the current Aid Year (e.g. Aid Year 2018) or the *Initial* Pell Item Type in the forward Aid Year (e.g. Aid Year 2019). If selected and the award would be higher for the forward Aid Year, the system awards zero Pell Grant for the summer/crossover term under the Additional Pell item type the current Aid Year. If the Pell Grant award for the summer/crossover term is higher using the current Aid Year, it will award the amount as Additional Pell. If *not* selected, the system awards Pell Grant for the summer/crossover term as Additional Pell in the current Aid Year without additional checks against the forward Aid Year.
CIP Code Year (Classification of Instructional Program Code Year)	From AY 2021, the COD origination process looks at this field to determine the value to use in the <ProgramCIPCodeYear> tag.

Activation Indicators

Field or Control	Description
Freshman Loan 30 Day Delay	Select to ensure that loans awarded to first-time, first-year students are assigned to a disbursement plan with the **30 Day Delay Loan Plan** option selected.
Pell Just In Time Institution	Select if your institution participates in the Just-In-Time program for Pell funding. This sets the **Just-In-Time** flag. When this flag is set, the Pell Disbursement Outbound process compares the disbursement date to the system date and does not process outbound records if the process date is more than three days from the disbursement date found on student award tables. Based on accepted origination and disbursement records, the funds for the requested disbursement are directly deposited into your institution's account.
FFELP Serial MPN Activation (federal family educational loan program serial master promissory note activation)	Select to indicate that your institution qualifies for serial master promissory note (MPN) processing. The field controls the default settings of the serial MPN fields in the CommonLine loan destination profile components. Select even if you have groups within your institution that do not qualify for serial MPN processing based on a regulatory or school policy.

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Field or Control	Description
Audit FA Term Build (audit financial aid term build)	Select to cause the system to write a row to the audit table if any changes occur to audited fields when you rebuild an FA term. View changes to the audited fields for a student using the FA Term Field Audits page. If you clear this check box, you cannot view the FA Term Field Audits page.

New Features

Field or Control	Description
Fluid Self Service	Select to indicate that Fluid features for Financial Aid Self Service have been adopted and to access the Disbursement page. By default, this check box is deselected. This check box is used to determine whether the settings on the Disbursement page are applied to the Fluid interface. See Campus Self Service: Setting Up Disbursement Options.

Mass EFC/SAI Parallel Processing Setup

Field or Control	Description
No. of Processes (number of processes)	Enter a number greater than zero for the number of Mass EFC/SAI Calculation processes you want to run simultaneously.
Min Nbr. Transactions / **Process** (minimum number of transactions)	Enter a number greater than zero for the minimum number of transactions per process.

Related Topics

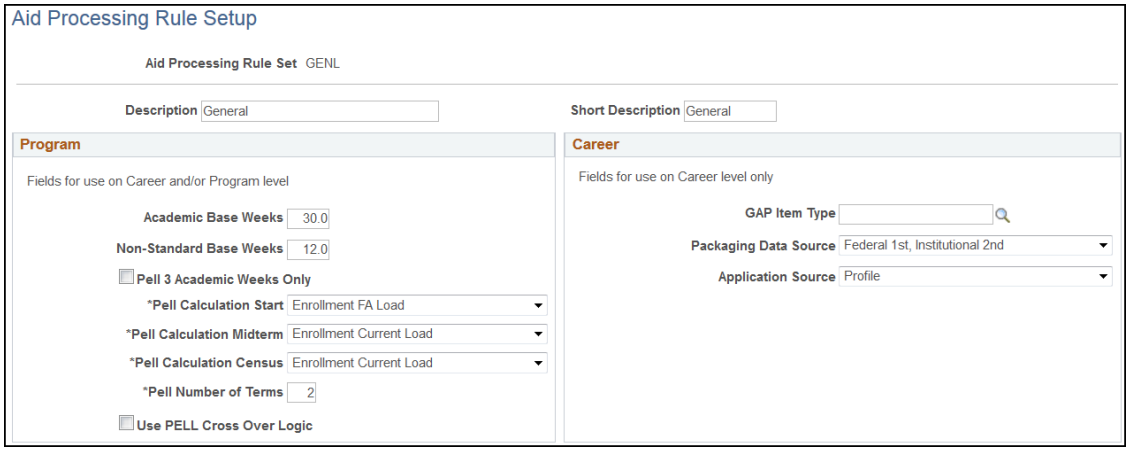
- Selecting Your Application Data Source for Awarding
  Specify whether you want to use federal application data (ISIR), institutional application data (PROFILE or an institutional application), or either (indicating which you would prefer to use if both are available). The application data source you select affects the packaging outcomes of Mass Packaging, Auto Packaging, and online manual awarding.
- Adding an Application Source Code for Canadian Applications
  This section discusses how to add an application source code.
- Defining Packaging Plans
  This section provides an overview of packaging plans setup and discusses how to:
- Awarding Pell Grants for the 2022-2023 and 2023-2024 Aid Years
  This section provides an overview of Pell Grant awarding and discusses how to:

Creating Aid Processing Rule Sets

Access the Aid Processing Rule Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Processing Rule Setup**).

This example illustrates the fields and controls on the Aid Processing Rule Setup page.

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Create as many rule sets as necessary for your business practices. The aid processing rule sets created on this page can be associated with a combination of aid year and academic career or aid year and academic program.

Enter a value for all fields on this page. The fields in the **Fields for use on Career level only** group box cannot differ for programs within the same career. If you are defining aid processing rule sets for multiple programs within a career, the values that you select in this group box should be the same for both aid processing rule sets. If you select different values, Packaging uses the values from the first aid processing rule set associated with the career for these fields.

The fields on this page correspond to those on the Financial Aid Defaults (INSTALLATION_FA) page.

> **Note**
>
> The Pell Number of Terms field is at the Academic Program Level.

Related Topics

- Defining Installation Level Defaults

Linking Aid Processing Rule Sets to Careers and Programs

Complete the Valid Career for Aid Year page. **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Careers for Aid Year).**

Related Topics

- Listing Valid Careers for the Aid Year
  Access the Valid Careers for Aid Year page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Careers for Aid Year**).

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Establishing Careers and Programs

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

To set up careers and programs, use the Valid Careers for Aid Year component (AID_YEAR_CAREER), Valid Programs for Aid Year component (AID_YEAR_PROGRAM), Careers for School Codes component (SCHOOL_CAREER1), Valid Terms for Career component (AID_YR_CAR_TERM), and the Define Career Types component (CAREER_TYPE). Use the AID_YR_CAR_TERM_CI component interface to load the data into the tables for this component interface.

This section discusses how to:

- List valid careers for the aid year.
- Define valid programs for aid year and career.
- Associate careers with school codes.
- Define valid terms for careers.
- Assign financial aid career types.

Pages Used to Establish Careers and Programs

Page Name	Definition Name	Navigation	Usage
Valid Careers for Aid Year	AID_YEAR_CAREER	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Careers for Aid Year**	List all academic careers that are eligible for financial aid during an aid year for an academic institution and assign the appropriate rule sets for need analysis calculations and for financial aid processing.
Copy Careers for Aid Year	AID_YR_CAR_COPY	Click the **Copy** button on the Valid Careers for Aid Year page.	Copy valid careers from one combination of academic institution and aid year to another.

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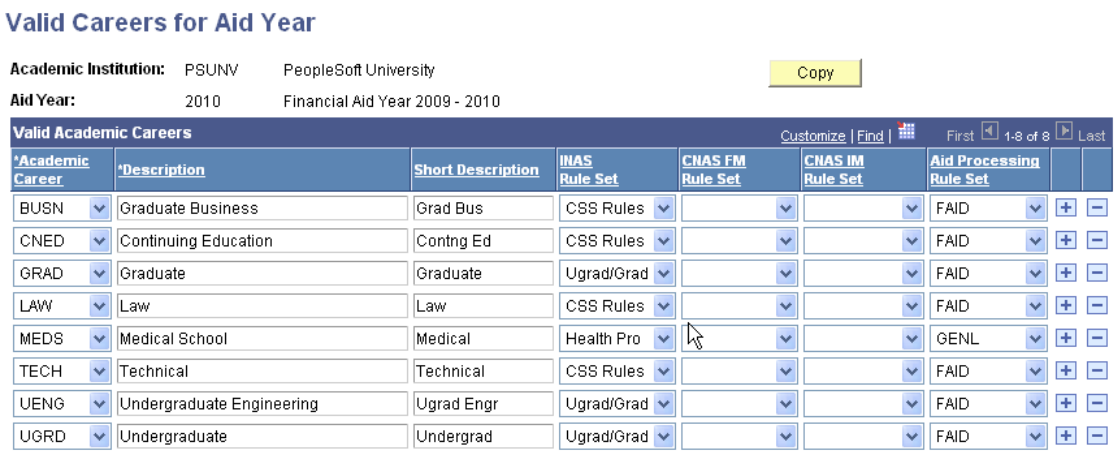
Page Name	Definition Name	Navigation	Usage
Valid Programs for Aid Year and Career	AID_YEAR_PROGRAM	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Programs for Aid Year**, and then **Valid Programs for Aid Year and Career**	Assign rule sets for need analysis calculations and assign financial aid processing rule sets that are specific to a program.
Copy Programs for Aid Year and Career	AID_YEAR_PROG_COPY	Click the **Copy** button on the Valid Programs for Aid Year and Career page.	Copy program-level defaults from one combination of academic institution, aid year, and career to another.
Careers For School Codes	SCHOOL_CAREER	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Careers for School Codes**	Specify the valid careers that exist for each Title IV school code at your institution.
Copy Careers for School Code	SCHOOL_CAR_COPY	Click the **Copy** button on the Careers for School Codes page.	Copy valid careers from one combination of academic institution, aid year, and school code to another.
Valid Terms for Careers	AID_YR_CAR_TERM	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Terms for Careers**	Define the eligible financial aid terms for each combination of academic career and aid year after you have specified the valid careers for each aid year.
Financial Aid Career Type	CAREER_TYPE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Financial Aid Terms**, and then **Define Career Types**, and then **Financial Aid Career Type**	Associate each of your academic careers with a financial aid career type.

Listing Valid Careers for the Aid Year

Access the Valid Careers for Aid Year page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Careers for Aid Year**).

This example illustrates the fields and controls on the Valid Careers for Aid Year page. You can find definitions for the fields and controls later on this page.

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Insert additional rows for all academic careers for this aid year at your institution.

Field or Control	Description
Option Rule Set	Select an **Option Rule Set** to define need analysis calculation options to associate with this career. The **Option Rule Set** value provides full flexibility to determine how need analysis is performed. You load the **Option Rule Set** table into the system using a data mover script delivered to your institution each year in a regulatory release. Select the **Option Rule Set** from these values: *CSS Rules, Health Pro* (health professional), or *Ugrd/Grad* (undergraduate/graduate). The **Option Rule Set**s are delivered as translate values and should not be changed or altered in any way. You can create additional **Option Rule Set**s for your institution by creating additional translate values.
CNAS FM Rule Set (Canadian Need Analysis System federal methodology rule set)	Select the CNAS rule set that provides calculation guidelines that define general need analysis to use for processing with federal methodology. This value is whatever your institution set up as CNAS rule sets such as CSL (Canada Student Loan) and OSL (Ontario Student Loan).
CNAS IM Rule Set (Canadian Need Analysis System institutional methodology rule set)	Select the CNAS rule set that provides calculation guidelines that define general need analysis to use for processing with institutional methodology. This value is whatever your institution set up as CNAS rule sets such as CSL (Canada Student Loan) and OSL (Ontario Student Loan).

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Field or Control	Description
Aid Processing Rule Set	For careers that have different default processing values from those specified at the installation level (on the Financial Aid Defaults page), select the aid processing rule set that you created that contains the correct default processing values for this career. For Pell Grant Awarding purposes, you might consider creating unique Pell Calculation Rule Sets by Academic Career.
Copy	Click this button to access the Copy Careers for Aid Year page and copy valid careers from one combination of academic institution and aid year to another.

Related Topics

- Establishing Defaults
  To set up defaults for Classic and Fluid interfaces, use the Installation Defaults (INSTALLATION_FA) and Aid Processing Rule Setup (FA_DFLT_RULE_SET) components.

Defining Valid Programs for Aid Year and Career

Access the Valid Programs for Aid Year and Career page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Programs for Aid Year**, and then **Valid Programs for Aid Year and Career**).

This example illustrates the fields and controls on the Valid Programs for Aid Year and Career page.



Enter only those programs that require a different need analysis or aid processing rule set than the installation defaults or the rule sets assigned to the program's career. If none of the academic programs within a career requires rule sets that differ from the career's rule sets, do not set up any programs for that career on this page.

For each academic program that you enter on this page, enter only those fields that differ from the career's value or the installation default value. For example, if the academic program uses the same **Option Rule Set** as the career, but requires a different aid processing rule set, populate only the **Aid Processing Rule Set** field on this page. For Pell Grant Awarding purposes, you might consider creating unique Pell Calculation Rule Sets by Academic Program. For example, if an Academic Program supports a Leading Summer term, you might create a unique Pell Calculation Rule Set that distinguishes it from an Academic Program that doesn't support a Summer term.

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Click the **Copy** button to access the Copy Programs for Aid Year and Career page and copy program-level defaults from one combination of academic institution, aid year, and career to another.

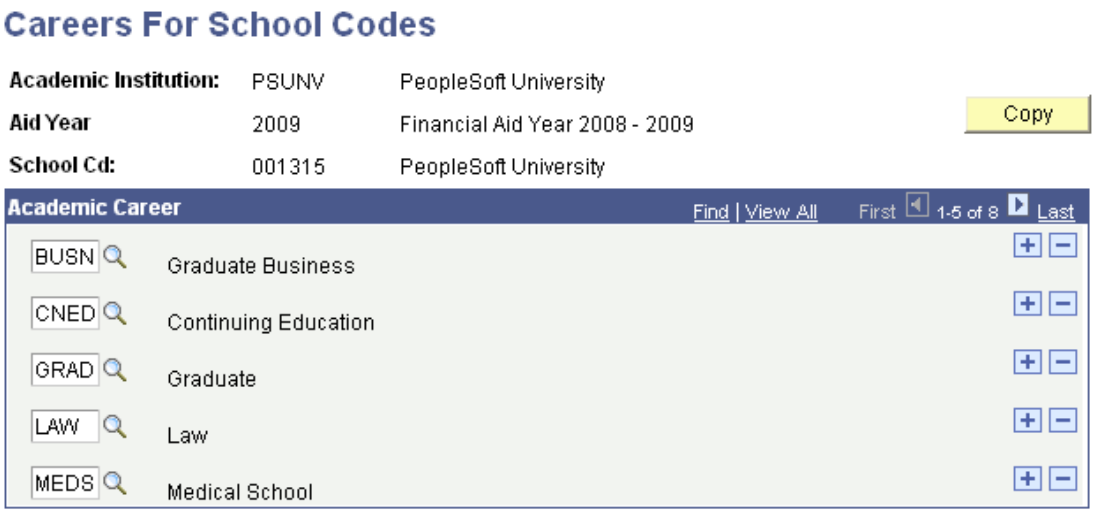
Related Topics

- Listing Valid Careers for the Aid Year
  Access the Valid Careers for Aid Year page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Careers for Aid Year**).
- Establishing Defaults
  To set up defaults for Classic and Fluid interfaces, use the Installation Defaults (INSTALLATION_FA) and Aid Processing Rule Setup (FA_DFLT_RULE_SET) components.

Associating Careers with School Codes

Access the Careers For School Codes page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Careers for School Codes**).

This example illustrates the fields and controls on the Careers For School Codes page. You can find definitions for the fields and controls later on this page.



Aggregate Aid processing uses this information about school codes and careers to track a student's financial aid history at your institution. The loan system uses this information to create loan institution records during setup.

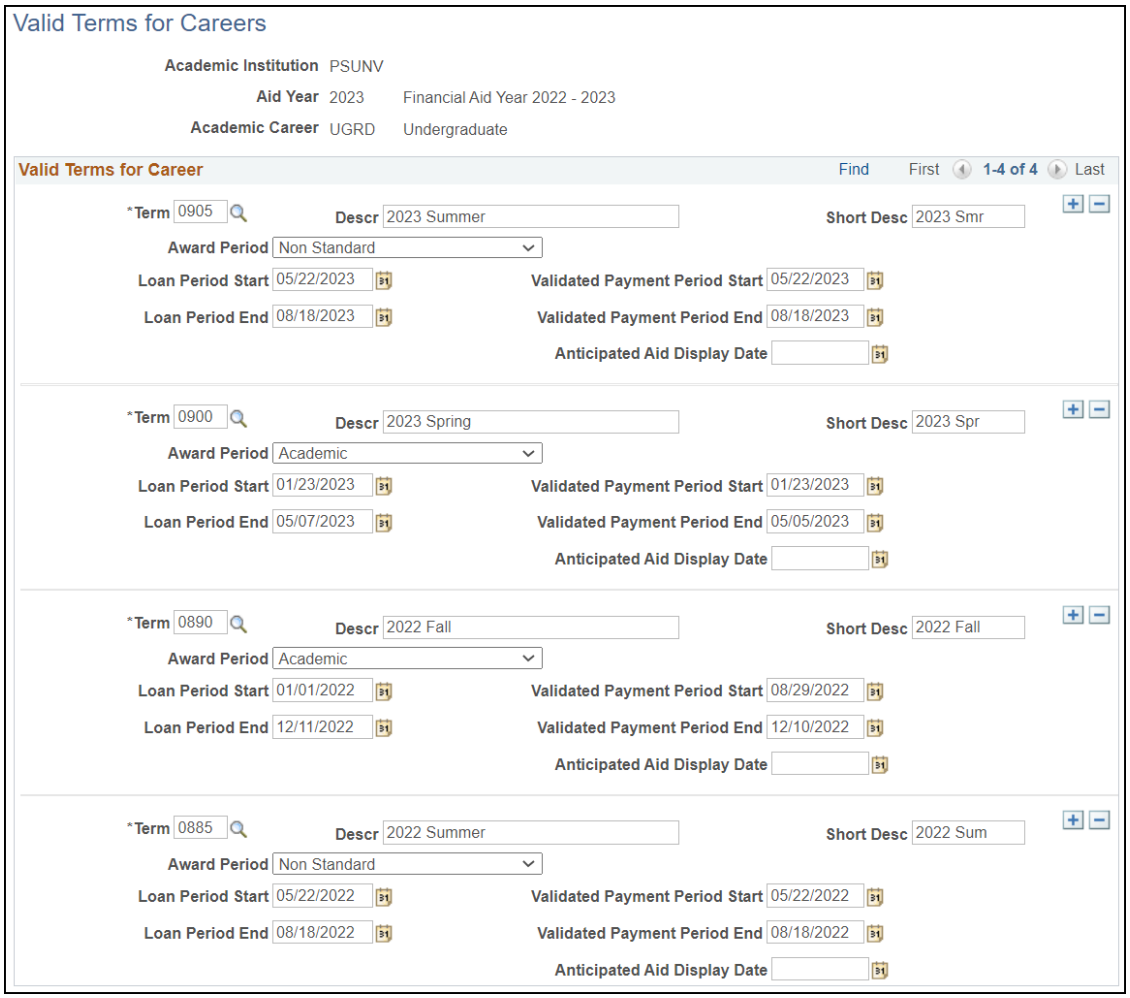
Field or Control	Description
Academic Career	Select an academic career that is valid for the displayed aid year and school code. You can select only academic careers that you have defined as valid for the displayed aid year on the Valid Careers for Aid Year page.
Copy	Click this button to access the Copy Careers for School Code page and copy valid careers from one combination of academic institution, aid year, and school code to another.

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Defining Valid Terms for Careers

Access the Valid Terms for Careers page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Terms for Careers**).

This example illustrates the fields and controls on the Valid Terms for Careers page. You can find definitions for the fields and controls later on this page.



Defining the valid terms for each financial aid career provides the system with general guidelines for awarding and processing financial aid within the academic year.

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Field or Control	Description
Term	Select a term for which financial aid is awarded. Values include only the terms identified in the Term/Session Table (TERM_TABLE) for the career. After you enter a term value and exit the field, the **Descr** and **Short Desc** fields are populated automatically. These values are defined on the Term Values Table page (TERM_VALUES_XREF). **Note:** FA Term uses the valid careers for aid year and valid terms for career setup tables to determine which aid year a term should be linked to. If you set up future terms, you must set up the corresponding aid year for those future terms. For example, if you had not set up 2006-2007 and were to run FA Term only for 2005-2006, the system would not recognize a term outside of the 2005-2006 academic/aid year.
Award Period	Select a term or set of terms associated with a period of enrollment for the purposes of need analysis and awarding. The term's award period supplements the EFC/SAI adjustment calculation as it relates to calculations that are not nine-month calculations. Packaging uses the award period to apply active or passive mode correctly during multiple award period processing. It is also used to manage the type of data to extract for the financial aid notification (FAN) letter. *Academic:* Indicates that the term is part of the standard academic year, and is generally associated with the nine-month EFC/SAI calculation. This is the default value. *Non Std* (nonstandard): Indicates that the term is a nonstandard term, such as an inter-session or summer term, and is generally associated with calculations that are other than nine-month EFC/SAI calculations.
Loan Period Start and **Loan Period End**	Select the dates that the loan period begins and ends. Student Records supplies default dates. These dates are required for each term to build a valid loan period dynamically. The start date should correspond to the first day of instruction for the term and the end date should correspond to the last day of instruction for the term. When the Loan Origination record is built, the system calculates the loan period using the earliest loan period start date and latest loan period end date from the terms contained within the disbursement plan assigned to the loan award. You can change period start and end dates at a student's individual loan origination level.

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Field or Control	Description
Validated Payment Period Start and **Validated Payment Period End**	Select the dates that correspond to the Payment Period Start Date and Payment Period End Date. The default dates are pulled from the Loan Period Start Date and Loan Period End Date values on the **Valid Terms for Career** page. If the default Validated Start and End Dates are overridden then the updated values are used.
Anticipated Aid Display Date	SSF_FINANCIALS web service uses the value in this field to determine whether or not to extract information about anticipated aid. If you set a date, SSF_FINANCIALS web service uses the value in this field as the starting date from which to extract information about anticipated aid until the expiration of the aid. If you do not set a date, SSF_FINANCIALS web service is unable to extract information about anticipated aid. See Student Financials: Using the SSF_FINANCIALS Web Service. **Note:** This field is for CS Financial Aid Anticipated Aid only.

Related Topics

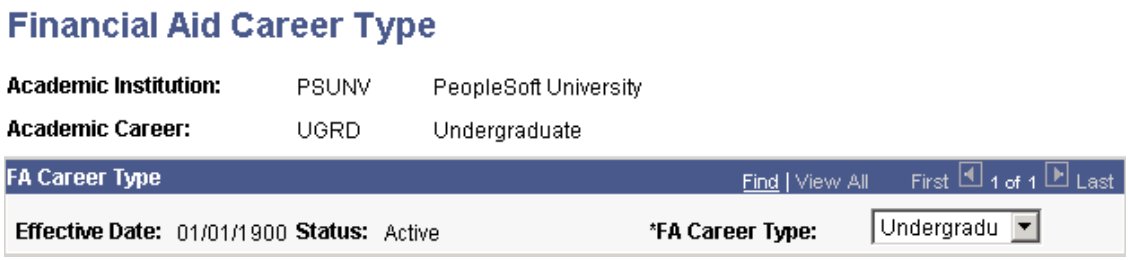
- Campus Solutions Application Fundamentals: Defining Term Values
- Campus Solutions Application Fundamentals: Setting Up Time Periods
- Campus Solutions Application Fundamentals: Defining Enrollment Action Reasons
- Campus Solutions Application Fundamentals: Defining Terms, Sessions, and Session Time Periods
- Understanding Passive/Active Mode in Multiple Award Period Processing
  Packaging is able to treat awards made during an initial award period as passive awards when you are processing a subsequent award period for a student. Two factors determine whether an award is processed in active or passive mode. First is the award period attribute associated with the packaging plan you are currently using to package the student. If the award period attribute is *B − Both,* Packaging considers all awards made in either award period as active awards (active for evaluation or reevaluation). As a result, in the "Both" award period model, if you want to prevent any existing awards that you have disbursed from being reduced, you must employ disbursement protection (with the exception of Direct Loan awards, because the system's Direct Loan processing rules function like disbursement protection). If the award period attribute associated with the packaging plan is *A − Academic* or *N − Non-Standard,* and existing awards made in a previous award period contain a disbursement plan/split code pattern that does not equal the packaging plan's award period, then those awards are considered as passive awards by Packaging. Conversely, if existing awards made in a previous award period contain a disbursement plan/split code pattern that either agree with the designated award period of the packaging plan or span both award periods, then those awards are considered to be active awards, and, therefore, are reevaluated by Packaging. Only the disbursements in the active award period portion of the award are reevaluated. Reevaluation may cause the existing awards to be reduced based on the revised need situation as well as revised eligibility criteria. An award cannot be reduced below the total of the disbursements in the passive award period portion of the award.

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Assigning Financial Aid Career Types

Access the Financial Aid Career Type page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Financial Aid Terms**, and then **Define Career Types**, and then **Financial Aid Career Type**).

This example illustrates the fields and controls on the Financial Aid Career Type page.



When a student has more than one academic career, Financial Aid Term statistics are combined for all academic careers that have the same financial aid career type. For example, if a student has two academic careers (undergraduate engineering and undergraduate) and the **FA Career Type** field is *Undergraduate* for both academic careers, Financial Aid Term statistics are combined for the two academic careers.

If the **FA Career Type** field is *not* the same for a student with multiple academic careers, the academic career primacy rules are used. The term statistics for the academic career with the higher primacy is used for the FA Term data. The term statistics for the academic career with the lower primacy are defined as other; you can view these statistics on the FA Term Other Units page.

The FA Career Type field is located on ACAD_CAR_TBL.

> **Note**
>
> If you do not assign financial aid career types, the system associates all academic careers with the *Undergraduate* career type by default and combines statistics for all your academic careers.

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Field or Control	Description
FA Career Type	Select the financial aid career type to associate with the displayed academic career. You have only one active effective-dated row for each academic career. If you need to change the career type associated with the academic career, select a different value in this field. The Financial Aid system delivers the following translate values; you can add additional translate values: *E:* Extended Education. *G:* Graduate. *P:* Professional. *U:* Undergraduate. This is the default value.

Activating an Aid Year for a Student

This section discusses how to:

- Activate an aid year manually.
- Activate an aid year in batch.

Loading electronic data for the student automatically activates the student for the aid year. If you do not expect to use electronic data from an outside source such as ISIR or PROFILE, you can manually activate an aid year for an individual student or a group of students.

For example, if you need to post external awards, such as outside scholarships or Student Financial transactions, before ISIR or PROFILE activity, you can activate the aid year using the batch process for that selected population.

Pages Used to Activate an Aid Year for a Student

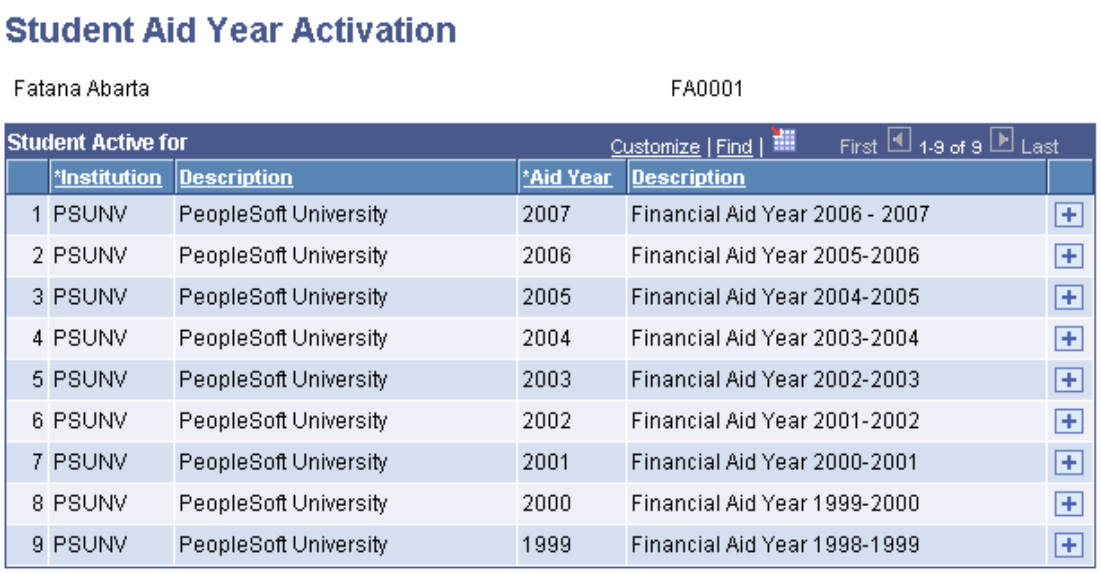
Page Name	Definition Name	Navigation	Usage
Student Aid Year Activation	AID_YEAR_ACTIVATE	**Financial Aid**, and then **Aid Year Activation**, and then **Manage Financial Aid Years**, and then **Student Aid Year Activation**	Activate an aid year for a student manually.
Aid Year Activate	SFA_RUNCTL_ACTADYR	**Financial Aid**, and then **Aid Year Activation**, and then **Process Financial Aid Years**, and then **Aid Year Activate**	Activate an aid year for a student in batch.

Activating an Aid Year Manually

Access the Student Aid Year Activation page (**Financial Aid**, and then **Aid Year Activation**, and then **Manage Financial Aid Years**, and then **Student Aid Year Activation**).

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This example illustrates the fields and controls on the Student Aid Year Activation page.



Student Aid Year Activation

Fatana Abarta FA0001

Student Active for — Customize | Find | First 1-9 of 9 Last

	*Institution	Description	*Aid Year	Description
1	PSUNV	PeopleSoft University	2007	Financial Aid Year 2006 - 2007
2	PSUNV	PeopleSoft University	2006	Financial Aid Year 2005-2006
3	PSUNV	PeopleSoft University	2005	Financial Aid Year 2004-2005
4	PSUNV	PeopleSoft University	2004	Financial Aid Year 2003-2004
5	PSUNV	PeopleSoft University	2003	Financial Aid Year 2002-2003
6	PSUNV	PeopleSoft University	2002	Financial Aid Year 2001-2002
7	PSUNV	PeopleSoft University	2001	Financial Aid Year 2000-2001
8	PSUNV	PeopleSoft University	2000	Financial Aid Year 1999-2000
9	PSUNV	PeopleSoft University	1999	Financial Aid Year 1998-1999

Use this page to create and manage aid years for an individual student ID. After you add a row, enter an aid year to activate and save your work.

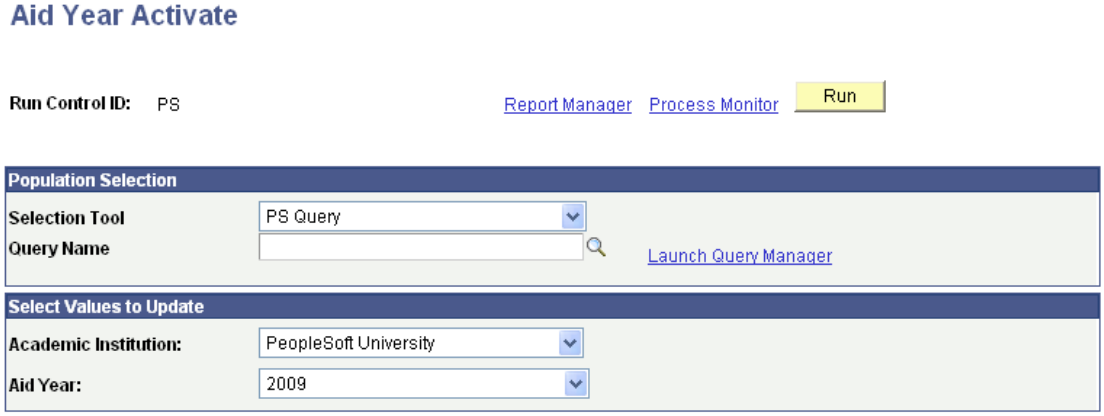
Important

Before activating an aid year for a student, ensure that the student has personal, biographical, and demographic data in PeopleSoft Campus Community. To verify this information or add the student, select **Campus Community**, and then **Personal Information**, and then **Biographical.**

Activating an Aid Year in Batch

Access the Aid Year Activate page (**Financial Aid**, and then **Aid Year Activation**, and then **Process Financial Aid Years**, and then **Aid Year Activate**).

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



Aid Year Activate

Run Control ID: PS Report Manager Process Monitor Run

Population Selection

Selection Tool: PS Query

Query Name: Launch Query Manager

Select Values to Update

Academic Institution: PeopleSoft University

Aid Year: 2009

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Use the Aid Year Activate process to create an aid year for a group of students.

Population Selection

Field or Control	Description
Selection Tool	Select from *Equation Engine, PS Query,* or *External File.* Additional parameters are displayed for your selected tool.
Query Name	Appears only when *PS Query* is selected. Select a population selection query that joins with the bind record SFA_ACTADYR_BND.

Select Values to Update

Field or Control	Description
Academic Institution	Enter the academic institution that the student is attending during the aid year.
Aid Year	Enter the aid year that you want to activate for the student.

Reviewing NSLDS Codes

To set up NSLDS codes, use the Maintain NSLDS Codes component (NSLDS_CODES1).

This section discusses how to review the NSLDS Code Table.

The U.S. Department of Education defines the NSLDS loan status codes, which are updated each year in a regulatory release. The NSLDS database is maintained by the Department of Education and provides a student's complete Pell Grant and loan history and their current status. You can view NSLDS status codes in the View NSLDS History component.

Page Used to Review NSLDS Codes

Page Name	Definition Name	Navigation	Usage
NSLDS Code Table	NSLDS_CODE_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Maintain NSLDS Codes**, and then **NSLDS Code Table**	Review the NSLDS codes.

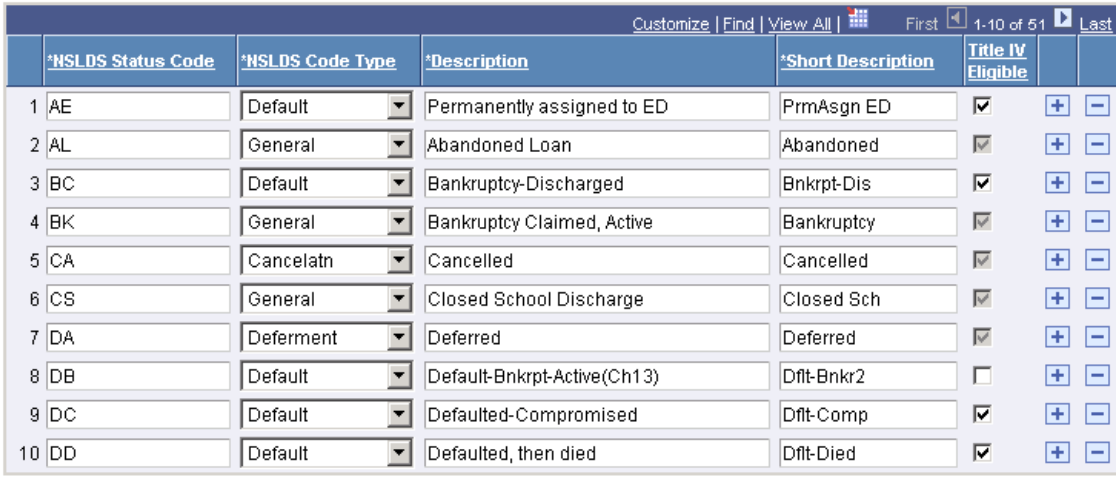
Reviewing the NSLDS Code Table

Access the NSLDS Code Table page (**(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Maintain NSLDS Codes**, and then **NSLDS Code Table**).

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

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NSLDS Code Table



Customize | Find | View All | First 1-10 of 51 Last

	*NSLDS Status Code	*NSLDS Code Type	*Description	*Short Description	Title IV Eligible
1	AE	Default	Permanently assigned to ED	PrmAsgn ED	☑
2	AL	General	Abandoned Loan	Abandoned	☑
3	BC	Default	Bankruptcy-Discharged	Bnkrpt-Dis	☑
4	BK	General	Bankruptcy Claimed, Active	Bankruptcy	☑
5	CA	Cancelatn	Cancelled	Cancelled	☑
6	CS	General	Closed School Discharge	Closed Sch	☑
7	DA	Deferment	Deferred	Deferred	☑
8	DB	Default	Default-Bnkrpt-Active(Ch13)	Dflt-Bnkr2	☐
9	DC	Default	Defaulted-Compromised	Dflt-Comp	☑
10	DD	Default	Defaulted, then died	Dflt-Died	☑

Field or Control	Description
NSLDS Status Code (National Student Loan Data System status code)	Displays the two-letter code defined by the U.S. Department of Education.
NSLDS Code Type (National Student Loan Data System code type)	Indicates the type of action associated with the status code. A status code can have a type of *Cancelatn* (cancellation), *Default, Deferment,* or *General.* This field is for informational purposes only.
Title IV Eligible	Indicates whether the NSLDS status code affects eligibility for Title IV aid. Review the default values to determine whether they apply to your institutional business rules. If this check box is selected, the student is still eligible for Title IV aid when the NSLDS status code appears on his or her database record. If the check box is cleared, the student is not eligible for Title IV aid when the NSLDS status code appears on their database record. If the check box is unavailable, the NSLDS status code has no effect on eligibility. This check box is for informational purposes only; no processing is associated with it.

> **Note**
>
> You can change the NSLDS Code Table if you find an error or if the U.S. Department of Education makes midyear regulatory changes.

Defining Aid Year Rollover

To set up aid year rollover, use the Term Values Cross Reference (TERM_VALUES_XREF) and Aid Year Setup (AID_YEAR_SETUP) components.

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

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- Set up term values cross-reference.
- Set up aid year rollover.
- Review table rollover options.

Understanding Aid Year Rollover

This section addresses many processing setup tables. After you set up your source processing for the award year, you can use aid year rollover to set up award year processing on an annual basis.

Aid year rollover provides an automated way for you create aid-year-specific setup tables from year to year. Two pages support this process: Aid Year Setup and Term Values Cross Reference. You must follow three steps to initiate this process.

1. Run the Aid Year Setup process (FA_AID_YEAR) to create General Aid Year and Aggregate Aid Limit tables (AGGR_AID_TBL).
2. Populate the Term Values Cross Reference table (TERM_VALUES_XREF).
3. Run the Aid Year Setup process to create remaining tables that are eligible for this process.

   You can use the Aid Year Setup page (RUNCTL_AID_YEAR) to define the setID, institution, and aid year that you want to copy from one aid year to the next. In addition, the system provides options for effective date usage, rollover for active or inactive rows, and a choice of tables to be copied forward to a target year.

The following dependencies are built into this process:

1. You must create or process General Aid Year tables first.
2. You can select General Aid Year and Aggregate Aid limits at the same time.

   If you select both, the system always runs General Aid Year before Aggregate Aid Limits.
3. You cannot run General Aid Year or Aggregate Aid Limits if you have Term Value Cross Reference-dependent setup options activated.
4. All options listed below Term Values Cross Reference depend on setup of the Term Values Cross Reference table.
5. Term Values Cross Reference depends on Term Values and Term/Session setup by records.

   This enables rollover to associate a term from the base year to a term in the target year.
6. You must run FA Term setup (RUN_CNTL_FATRMP) as a single option to check and update the tables as needed for the target year and then proceed with the remaining options.

   Many tables created subsequently use the FA Term tables created as prompt tables.
7. Budget Tables depend on FA Term table creation for career term values.
8. FA item types depend on aggregate aid limits.

   If Aggregate Area is populated in FA Item Type (FINANCIAL_AID_ITEM) for source year, the system verifies that aggregate aid limits are set up for the target year. If the Aggregate Area is blank, the system bypasses the dependency. The rollover of disbursement IDs and disbursement split codes is included in FA Item Type tables setup.
9. Disbursement rules are keyed by FA Item Type and depend on FA Term and FA Item Types table creation.

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10. Disbursement Rules setup copies all effective-dated rows from the source year using the same effective dates.

    Therefore, you must adjust the effective dates for the new aid year before you can run the authorization and disbursement processes. Adjust the effective dates in the Disbursement Authorization Calendar, Disbursement Rules: Global, and Disbursement Rules: Item Type components.
11. Packaging table setup depends on the creation of the FA Item Types table.
12. Return of TIV depends on the creation of the Budget table.
13. Loan Tables depend on the creation of the FA Item Types table.
14. Pell payment depends on records setup of ACAD_CAR_TBL and ACAD_PROG_TBL.

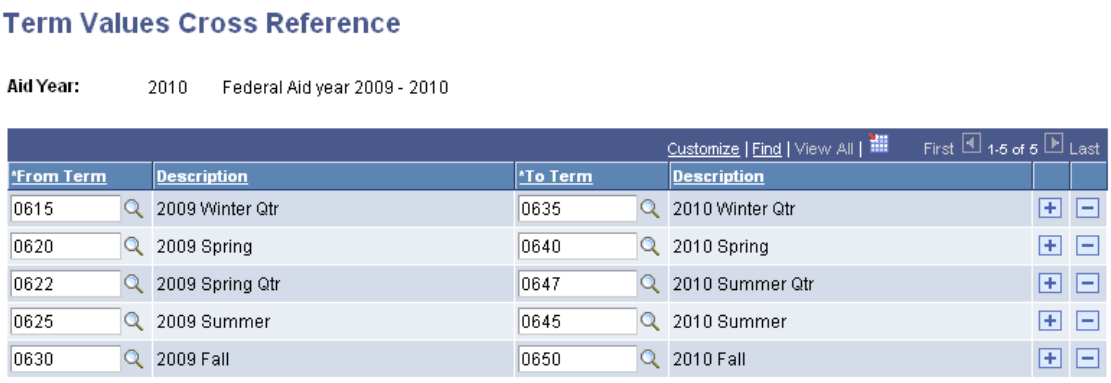
Pages Used to Define Aid Year Rollover

Page Name	Definition Name	Navigation	Usage
Term Values Cross Reference	TERM_VALUES_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Term Values Cross Reference**	Set up term value cross-reference to process all rollover options except for General Aid Year and Aggregate Aid Limits.
Aid Year Setup	RUNCTL_AID_YEAR	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Year Setup**	Create aid-year—specific setup tables from year to year.

Setting Up Term Values Cross Reference

Access the Term Values Cross Reference page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Term Values Cross Reference).**

This example illustrates the fields and controls on the Term Values Cross Reference page. You can find definitions for the fields and controls later on this page.



Set up the Term Values Cross Reference page to process all options except General Aid Year and Aggregate Aid Limits. Confirm that your records department has set up term values for the target aid year being created and has also associated each term with the appropriate career in

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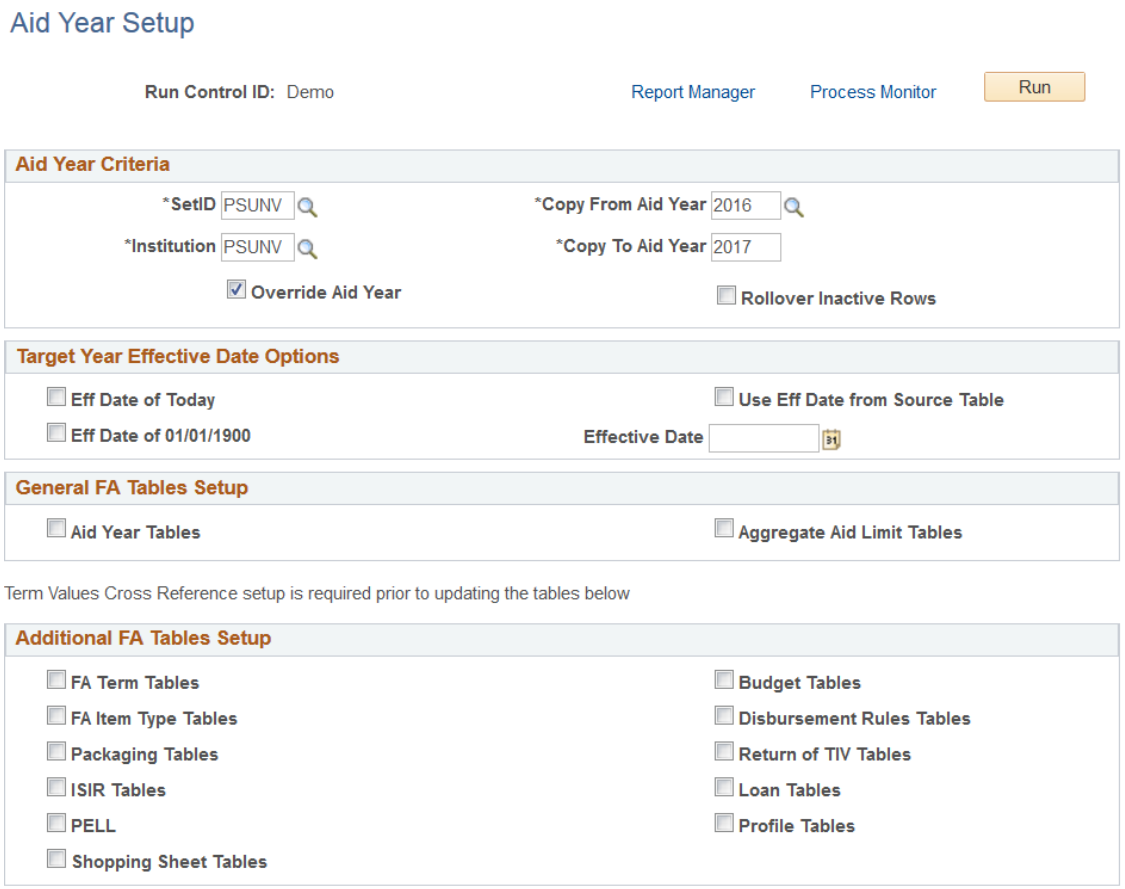
the Term/Session table. Term values that are set up in Cross Reference that do not exist in Student Records are not created for the tables being processed. Verify term setup in Student Records before you set up your Term Values Cross Reference.

Field or Control	Description
From Term	Enter the terms from your source year.
To Term	Enter the terms to be created by associating them with the appropriate **From Term** value.

Setting Up Aid Year Rollover

Access the Aid Year Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Year Setup**).

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



> **Note**
>
> You must perform a separate aid year rollover for each set of setID and institution combinations.

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After selecting your rollover options, click the **Run** button to run the FA_AID_YEAR process.

Carefully review the message log generated by this process. Although you can access the message log several ways, to get additional details, click **Process Monitor** to locate the appropriate process instance for this process. Click **Details** and then click **Message Log.** For each process action, you can click **Explain** to review additional information about the action taken or the action that you might need to take.

Aid Year Criteria

Field or Control	Description
SetID	Select the setID. In cases in which institution and setID are keys, the system rolls only those rows found that match on both the setID and institution. For example, the Loan Fee Table is keyed by setID and institution, so if you specify SetID = GLAKE Institution = PSUNV, the system does not create rows for SetID of PSUNV with Institution PSUNV for the aid year created by the process.
Institution	Select the institution to process the source year and copy to the target year.
Copy From Aid Year	Select the source aid year.
Copy To Aid Year	Select the target aid year.
Override Aid Year	Select to override setup tables in the target year for which they might already be created. When you select this check box, the system rolls over a new record along with records that have already been rolled over. If you have updated the tables in the target year either manually or after you have run the aid year process, and you run aid year rollover again with this check box selected, the system overwrites the updated target data with source year data. If the check box is cleared and you have made changes to the source year data, the system does not roll these changes forward to the target year if the target table has already been created. The **Override Aid Year** option works differently for budgets. When you select the **Budget Table** option and **Override Aid Year** is not selected, the system rolls forward only new rows added in the source year to the target year. This way, data that has been rolled previously is preserved, and the system adds new source year data to it.
Rollover Inactive Rows	Select to roll forward to the target year an inactive row if it is the latest row in the table being processed. If you select this option for disbursement rules or budgets, the system rolls forward any inactive row in the source year to the target year. The system assigns any inactive rows created in the target year an inactive status.

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Target Year Effective Date Options

Field or Control	Description
Eff Date of Today (effective date is today's date)	Select to insert the current date for all effective-dated rows created except for disbursement rules and budgets.
Use Eff Date from Source Table (use effective date from the source table)	Select to insert the date used in base year rows for all effective-dated rows created in the target year.
Eff Date of 01/01/1900 (effective date of January 1, 1900))	Select to (with the exception of disbursement rules and budgets) roll forward only the latest effective-dated row from the source year to the target year. The process rolls over rows to the new aid year using one of three effective-dated choices, and if applicable, existing sequence, process, criteria, and so on. For disbursement rules and budgets, the process rolls forward all active rows and always uses the source date as the effective date. You must manually adjust these dates. For all options, the process does not roll over inactive rows unless you select the **Rollover Inactive Rows** option.
Effective Date	Select a static date as the Effective Date for all effective-dated rows except for disbursement rules and budgets. **Note:** If you specify a date in this field, you cannot select any of the other Target Year Effective Date Options.

General FA Tables Setup

Field or Control	Description
Aid Year Tables	Select to move general Aid Year source tables to target year tables. You must run General Aid Year first.
Aggregate Aid Limits	Select to move Aggregate Aid Limits source tables to target year tables. You can select Aggregate Aid Limits to run with General Aid Year tables. If you select both, the system always runs General Aid Year tables before Aggregate Aid Limits.

Additional FA Tables Setup

Before you can update any of the following tables, you must set up the Term Values Cross Reference page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Term Values Cross Reference).**

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Field or Control	Description
FA Term Tables (financial aid term tables)	Select to move FA Term source tables to target year tables. Run FA Term setup as a single option to check and update the tables as needed for the target year and then proceed with the remaining options.
Budget Tables	Select to move Budget source tables to target year tables. Budget tables depend on FA Term table creation for career term values.
FA Item Type Tables (financial aid item type tables)	Select to move FA Item Type source tables to target year tables. FA Item Types depend on Aggregate Aid Limits. If Aggregate Aid Limits do not exist in the source and target year, the system bypasses the dependency. The rollover of disbursement IDs and split codes is included in FA Item Type tables setup.
Disbursement Rules Tables	Select to move Disbursement Rules source tables to target year tables. Disbursement Rules are keyed by FA Item Type and depend on FA Term and FA Item Type table creation. Disbursement Rules setup copies all effective-dated rows from the source year using the same effective dates. Thus, you must adjust the effective dates for the new aid year before you can run the authorization and disbursement processes. Adjust the effective dates in the Disbursement Authorization Calendar, Disbursement Rules: Global, and Disbursement Rules: Item Type components.
Packaging Tables	Select to move Packaging source tables to target year tables. Packaging table setup depend on FA Item Types table creation.
Return of TIV Tables	Select to move Return of TIV source tables to target year tables. Return of TIV depends on Budget Table creation.
ISIR Tables (Institutional Student Information Record tables)	Select to move ISIR source tables to target year tables. You cannot run this process without first setting up the Term Values Cross Reference.

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Field or Control	Description
Loan Tables	Select to move Loan source tables to target year tables. Loan tables depend on FA Item Types table creation. You cannot run this process without first setting up the Term Values Cross Reference. Loan Tables includes the CL4 Loan Destination Profile tables. Because CL4 Loan Destination Profiles cannot be deleted or inactivated, the process copies data to the target year even though loan agencies associated with the destination might no longer be valid, making the destination itself invalid. To avoid copying invalid CL4 Loan Destination Profiles, the process compares each loan agency (Lender/Guarantor/Servicer) associated with the loan destination against Loan Agency Defaults setup. If any loan agency OPEID from the CL4 Loan Destination Profile matches an OPEID setup on the Loan Agency Defaults page, the destination is not copied to the target year. **Note:** During the Aid Year Setup process, the Loan Agency Default tables are copied before the CL4 Loan Destination Profile tables are copied. This enhancement uses Loan Agency Default values from the target year when comparing OPEIDs.
Pell Tables	Select to move Pell Payment source tables to target year tables. Pell Payment depends on Records setup of ACAD_CAR_TBL and ACAD_PROG_TBL. You cannot run this process without first setting up the Term Values Cross Reference.
PROFILE Tables	Select to move PROFILE source tables to target year tables. You cannot run this process without first setting up the Term Values Cross Reference.
Shopping Sheet Tables	Select to move Shopping Sheet source tables to target year tables. Oracle recommends that you roll over the Budget and FA Item Type tables prior to rolling over Shopping Sheet tables.

Reviewing Table Rollover Options

The following tables are eligible for rollover for the new year. The order in which they appear for each setup option is the processing order.

General Aid Year

This table displays rollover options for general aid year:

Record Name	Page Name
FED_AID_YR_TBL	Federal Aid Year Table
AID_YEAR_TBL	Aid Year Table

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Record Name	Page Name
AID_YEAR_CAREER	Valid Careers for Aid Year
AID_YEAR_PROG	Valid Programs for Aid Year
TIV_SCHOOL_TBL	School Code Table
INST_SCHOOL_CDS	School Codes for Institution
SCHOOL_CAREER	Careers for School Codes
FA_APP_SRC_TYP	Application Source Rank
FA_APP_SRC_TBL	Application Source Rank
FA_APP_SRC_RANK	Application Source Rank
SS_FA_INSTALL	Self-Service Options

Aggregate Aid Limits

This table displays rollover options for aggregate aid limits:

Record Name	Page Name
AGGR_LIMIT_TBL	Aggregate Aid Limits
AGGR_LVL_LIMITS	Aggregate Aid Limits

FA Term

This table displays rollover options for FA Term:

Record Name	Page Name
FATRMP_CAREER	FA Term Setup
FATRMP_CAR_TRM	FA Term Setup
AID_YR_CAR_TERM	Valid Terms for Career

Budgets

This table displays rollover options for budgets:

Record Name	Page Name
RUN_CNTL_BDGT_P	Budget Assign Run Control
BUDGET_CATG_TBL	Budget Categories
BDGT_ASIGN_CNTL	Budget Assignment
RUN_CNTL_FABDGT	Budget Assign Run Control
BDGT_ASIGN_TERM	Budget Assignment
BUDGET_ITEM_TBL	Budget Items
BUDGET_GRP_TBL	Budget Groups
BUDGET_ITEM	Budget Items
BDGT_TREE_CATG	Budget Trees
BDGT_FORMLA_TYP	Budget Formulas
BDGT_FORMLA_TBL	Budget Formulas

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Record Name	Page Name
BDGT_FORMLA_DFN	Budget Formulas
BDGT_TREE_TBL	Budget Trees
BDGT_FRMULA_GRP	Budget Formulas
BDGT_ASIGN_CATG	Budget Assignment

FA Item Type Tables

This table displays rollover options for FA item types:

Record Name	Page Name
ITEM_TYPE_FA	Financial Aid Item Types
ITEM_TYPE_FISCL	Fiscal Item Type
ITM_TP_TERM_LMT	Financial Aid Item Types
LN_FEE_TBL	Loan Fee Table
ITEM_TYP_FA_FEE	Financial Aid Item Types
DISB_PLAN_TBL	Disbursement Plan Table
DISB_ID_TBL	Disbursement ID Table
DISB_SPLIT_CD	Disbursement Split Codes
DISB_ID_SPLIT	Disbursement Split Code Formulas
ITEM_TP_FA_DISB	Financial Aid Item Types
AWD_MESSAGE_TBL	Award Messages

Disbursement Rules

This table displays rollover options for disbursement rules:

Record Name	Page Name
DISB_CAL_TBL	Disb/Authorization Calendar
AUTH_CAL_TBL	Disb/Authorization Calendar
AUTH_CAL_DATA	Disb/Authorization Calendar
DISB_CAL_DATA	Disb/Authorization Calendar
DISB_RULE_GLB	Disbursement Rules Global
DISB_RULE_SRV	Disbursement Rules Global
DISB_RULE_ITM	Disbursement Rules Item Type
DISB_RULE_CHK	Disbursement Rules Item Type
DISB_RULE_ITS	Disbursement Rules Item Type
DISB_RULE_USR	Disbursement Rules Global
DISB_RULE_ITU	Disbursement Rules Item Type
DISB_RULE_TRK	Disbursement Rules Global
DISB_RULE_ITK	Disbursement Rules Item Type

Packaging

This table displays rollover options for packaging:

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Record Name	Page Name
AWD_ADJ_RSN_TBL	Award Adjustment Reasons
FA_INST_DEFN	Institutional Mass Packaging
FA_INST_CRIT	Institutional Mass Packaging
FA_INST_CRITLST	Institutional Mass Packaging
PKG_RTNGCMP_TBL	Packaging Rating Components
PKG_EQUITY_LMT	Pkg Equity Item Types
PKG_EQUITY_ITM	Pkg Equity Item Types
PKG_REL_ITM_TBL	Pkg Related Item Type Group
PKG_REL_ITM_TYP	Pkg Related Item Type Group
PKG_PLAN_TBL	Packaging Plan
PKG_RULE_TBL	Packaging Plan
FA_BPKG_DEFN	Mass Packaging Definition
FA_BPKG_CRIT	Mass Packaging Definition
FA_BPKG_CRITLST	Mass Packaging Definition
RSTRC_AID	Restricted Aid Table
RSTRC_AID_ORG	Restricted Aid Table
RSTRC_AID_COM	Restricted Aid Table
RSTRC_AID_MEM	Restricted Aid Table

Return of Title IV

This table displays rollover options for return of Title IV:

Record Name	Page Name
RTRN_TIV_SETUP	Return of TIV RULES
RTRN_TIV_SETUP0	Return of TIV RULES
RTRN_TIV_SETUP2	Return of TIV RULES
RTRN_TIV_SETUP3	Return of TIV RULES

ISIR

This table displays rollover options for ISIR:

Record Name	Page Name
ISIR_SRCH_ADD	ISIR Data Load Parms
ISIR_SRCH_PRM	ISIR Data Load Parms
ISIR_INST_CNTRL	ISIR Data Load Parms
INAS_FM_ASMPTN	FM Assumption Codes

Loans

This table displays rollover options for loans:

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Record Name	Page Name
LN_TYPE_TBL	Loan Type Table
LN_TO_NSLDS_TYP	Loan Type Table
LN_ITEM_TBL	Loan Type Table
LN_RPT_ITEM	Loan Report Definitions
LN_PNOTE_TBL	Loan Type Table
LN_RPT_COL	Loan Report Definitions
LN_ACTNTYPE_TBL	Loan Action Code Table
LN_ACTN_PRG_TBL	Loan Action Code Table
LN_ACTNMSG_TBL	Loan Action Code Table
LN_ACTNCD_TBL	Loan Action Code Table
LN_DESTPROF_TBL	Loan Destination Profile
LN_DEST_CATGRY	Loan Destination Profile
LN_DEST_EDIT	Loan Destination Profile
LN_INSTUTN_TBL	Loan Institution
LN_INSTN_CNTACT	Loan Institution
LN_INST_DEST	Loan Institution
LN_EDIT_DFLT	Loan Edit Defaults
LN_EDITDFLT_DTL	Loan Edit Defaults
LN_RPT_PKG	Loan Report Packages
LN_RPT_LNK02	Loan Report Packages
LN_DL_CHG_XREF	Direct Lending Change fields
LN_DL_INST_PARM	Loan DL Inst Change Hold/Susp
LN_PN_TYPE_TBL	DL Serial Prom Note Table
LN_EDIT_TBL	Loan Edits/Messages
LN_AGENCY_DFLT	Loan Agency Defaults
SFA_COD_LN_ATTD	Attended School Routing ID
SFA_LNDR_SEL	Lender Select Setup
SFA_LNDR_DTL	Lender Select Detail
SFA_LN_CNSL_SU2	Loan Item Type
SFA_LN_CNSL_SU	Loan Item Type

Pell Tables

This table displays rollover options for Pell payment:

Record Name	Page Name
PELL_PMT_OPTION	Pell Payment Setup
PELL_PMT_CAREER	Pell Payment Detail
PELL_ATTENDING	Pell ID Attending
PELL_COMNT_TBL	Pell Comment Codes

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PROFILE

This table displays rollover options for PROFILE:

Record Name	Page Name
INAS_IM_ASMPTN	INAS IM Assumption Codes
INST_LOAD_CNTRL	PROFILE Data Load Parms

Shopping Sheet

This table displays rollover options for Shopping Sheet.

Record Name	Page Name
SFA_SS_SETUP	Group Options & Institution Information
SFA_SS_SETUPCOA	Budget Mapping
SFA_SS_SETUPAWD	Award Mapping (Award Group Mapping)
SFA_SS_SETUPAW2	Award Mapping (Item Type Inclusion Exceptions)

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3

Setting Up Financial Aid Terms

Understanding Financial Aid Terms

A financial aid term is a combination of a period of time that your school determines as an instructional accounting period and an academic career. Your institution defines the financial aid terms during the setup process. Because some institutions might not offer financial aid for all of their academic terms, only the terms eligible for financial aid are set up for each financial aid career. For example, if your institution does not offer financial aid for an intersession term, you would not set up the intersession term as a valid term for a career. To receive financial aid, a student must be enrolled in a valid program leading to a degree or certificate and must meet satisfactory academic progress standards.

Financial Aid enables you to maintain actual or projected enrollment data for a specific financial aid term for a student. Because PeopleSoft Campus Solutions also allows concurrent term enrollments in different academic careers and academic programs, the information maintained using the financial aid term is then used to determine a student's financial aid load, level, budget, and award. A financial aid term record is built for only one combination of career and program. If students are enrolled in multiple careers or programs, then career primacy information is used to determine which combination of career and program information is built in the financial aid term. The FA Term Other Units page displays units taken for the other career or program. Use the FA Term component to provide student term data for financial aid processing. The system tracks academic detail for each financial aid applicant on the financial aid term table. This information includes the student's career, primary program, academic plan, enrollment, academic level and standing, and financial aid standing. The financial aid office uses this data to validate a student's eligibility to receive aid, to establish a student's budget, and to proceed toward the Awarding process.

Many downstream financial aid processes, such as building student budgets, awarding students, originating student loans, requesting Pell funds, and disbursing aid to students, depend on having the financial aid term information built. Financial aid terms can be built with specific enrollment data or with projected data. Enrollment data is the enrollment statistics for a specific term from PeopleSoft Student Records. Projected data is projected statistics that come from many of the academic setup tables, such as the Level/Load Rules component, the Session Table page, the Academic Career Table component, and the Academic Program Table component. You must understand these tables and be familiar with the information that they contain to ensure the proper use and building of the financial aid terms.

The information that you enter on the FA Term Setup page determines whether the financial aid terms can be built using only enrollment data or changes to enrollment data (updates), or whether they can be built using projected data in addition to enrollment data (updates and projections). To provide an additional control on what type of data to use when building the financial aid terms, you can direct the financial aid term build process to use either updates and projections or updates only.

Defining the Parameters for Creating Financial Aid Terms

To set up financial aid terms, use the Set Up Financial Aid Term component (FA_TERM_SETUP).

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You identify the terms that you want the financial aid term process to build for a student. Because your institution might not offer financial aid for all of its academic terms, you must specify which academic terms are also financial aid terms on the Valid Terms for Career page.

This section discusses how to set up financial aid terms.

Page Used to Define the Parameters for Creating Financial Aid Terms

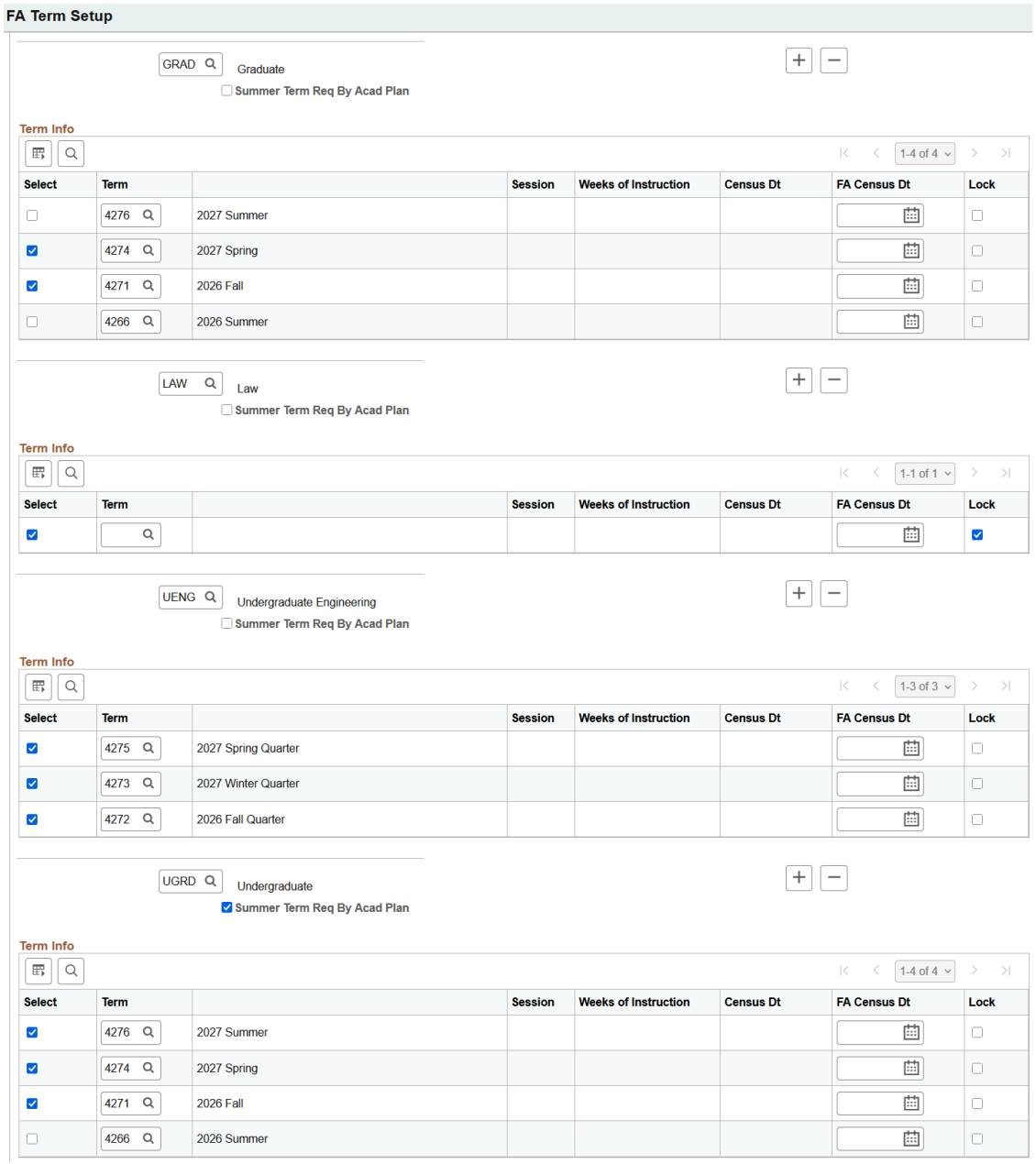
Page Name	Definition Name	Navigation	Usage
FA Term Setup	RUN_CNTL_FATRMP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Financial Aid Term**, and then **Setup Financial Aid Term**	Establish the processing rules for building financial aid terms for academic careers.

Setting Up Financial Aid Terms

Access the FA Term Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Financial Aid Term**, and then **Setup Financial Aid Term**).

This example illustrates the fields and controls on the FA Term Setup page. You can find definitions for the fields and controls later on this page.

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Enter a row for *every* academic career that you assign.

Field or Control	Description
Select	Select the check box to the left of each term to use in the automatic financial aid term build process when building terms in projection.

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Field or Control	Description
Summer Term Req'd by Acad Plan	Use this checkbox when academic plans within the selected career require summer enrollment. This option works with the Term grid Select checkbox. If a summer term is selected for the career, the FA Term build process creates a summer term only for students whose academic plan requires summer enrollment.
Term	Displays all of the terms that you associated with this combination of aid year and academic career on the Valid Terms for Careers page. If you do not select a term on this page, no FA Term information is built for the term when building terms in projection. If enrollment data exists for a term, that term is always built, even if the term is not selected on this page. During packaging, if your disbursement plan covers a term that does not have FA Term information, the system generates an error during the validation process.
Session	Displays the default session, such as a regular academic session or an Open Entry or Open Exit session, as established on the Session Table page in the Term/Session Table component. If your institution has more than one session for a term, this page displays only the default session.
Weeks of Instruction	Displays the number of weeks of instruction for the default session, established on the Session Table page in the Term/Session Table component.
Census Dt (census date)	Displays the date used to capture the student's enrollment for the term, established in the **Census Date** field on the Session Table page in the Term/Session Table component. If no FA census date is defined for the term on the FA Term Setup page, the financial aid term build process uses this census date to determine when to stop building terms with projected data and when to discard all terms built with projected data.
FA Census Dt (financial aid census date)	To stop building terms with projected data, and to discard all terms built with projected data after a certain date in the term, enter that date in this field. The term can no longer be built as a projection after the date that you enter in this field, and any projections for that term become inactive.

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Field or Control	Description
Lock	This lock is for census date activation. Select this check box to lock certain student enrollment fields as of either the census date or the financial aid census date. If both dates exist, the financial aid census date is used. If you run the financial aid term build process on or after the census date, the system does not change the data in these fields. You can override this lock at the student level on the financial aid term component. The fields that are locked are FA_LOAD **(Financial Aid Load** field on the Acad Level page), UNT_TAKEN_FA **(Taken** field in the **Term** column on the Statistics page) on the FA Term table. and Enrollment Intensity (SFA_ENRL_INTENSITY). The **BUDGET_REQUIRED** field (on the Financial Aid Info page) is changed to *No Assign* after the census date. If the term has no census date or financial aid census date, this check box has no effect. If the check box next to the term is cleared, then the **Lock** check box has no effect, even if it is selected.

Related Topics

- Defining Academic Plans

Setting Up Cost Codes

This section discusses how to define cost codes.

Pages Used to Set Up Cost Codes

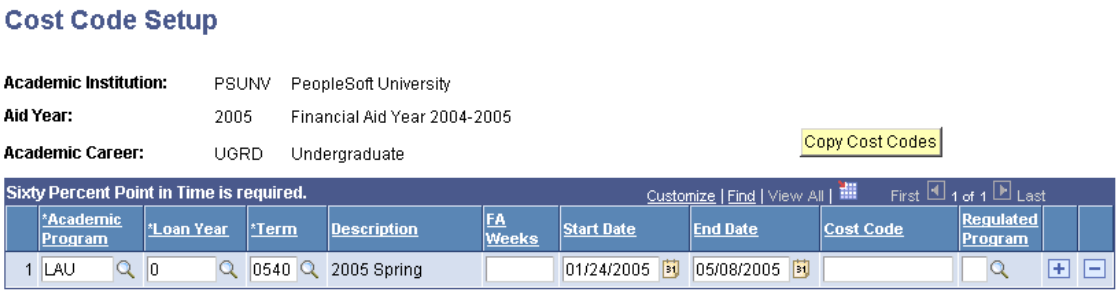
Page Name	Definition Name	Navigation	Usage
Cost Code Setup	CAN_COST_CODE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canadian Application Processing**, and then **CNAS Cost Code**, and then **Cost Code Setup**	Define cost codes and the number of financial aid weeks for each combination of institution, aid year, career, academic program, loan year, and term.
Copy Cost Code	COST_CODE_COPY_SEC	Click the **Copy Cost Code** button on the Cost Code Setup page.	Copy cost codes from a previous aid year or another career for the current aid year and career that you are setting up.

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Defining Cost Codes

Access the Cost Code Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canadian Application Processing**, and then **CNAS Cost Code**, and then **Cost Code Setup**).

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



Canadian institutions use cost codes to report financial aid calendars, length of financial aid award periods, and cost of attendance information to the Canada Student Loan program. The FA Term build process uses this information to determine the student's cost code and financial aid number of weeks and then populates the new fields on the student FA Term page.

Field or Control	Description
Academic Program	Select an academic program for which you want to define a cost code.
Loan Year	Select a year in school to associate with the academic program for the cost code. Values are: *0:* First Year, Never Attended *1:* First Year, Previously Attended *2:* 2nd Year *3:* 3rd Year *4:* 4th Year *5:* 5th Year *A:* 1st Year Graduate *B:* 2nd Year Graduate *C:* 3rd Year Graduate *D:* 4th Year or more Graduate *G:* Graduate/Professional
FA Weeks (financial aid weeks)	Enter the number of weeks in the term for financial aid purposes. The number of weeks for financial aid can be different from the number of weeks in the term.

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Field or Control	Description
Start Date and **End Date**	Enter the dates that the instructional period begins and ends for financial aid purposes. This field is populated by default with the term start date and term end date from the Term/Session Table component. The start and end dates for financial aid can be different from the start and end dates of the term.
Cost Code	Enter the cost code to associate with this combination of career, program, and year in school.
Regulated Program	Indicate whether the program is regulated by Ontario Student Assistance Program (OSAP). Regulated programs might be subject to tuition and fee caps and therefore handled differently in the Ontario Student Loan (OSL) assessment of a student's contribution and need. Values are: *N:* Nonregulated program *R:* Regulated program
Copy Cost Code	Click to access the Copy Cost Code page and copy the list of cost codes from an established combination of institution, aid, year, and career to the current combination that you are setting up.

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4

Setting Up Student Budgets

Understanding Student Budgets Setup

At the beginning of the aid-processing year, you create budgets that detail the cost of attendance (COA) for each term a student is enrolled. The COA is an estimate of a student's educational expenses for the period of enrollment. The budget helps establish a student's need (COA minus the student's expected family contribution), which permits the financial aid office to award need-based aid.

This section discusses:

- Budget components.
- Budget assignment formulas.

> **Note**
>
> Beginning with the 2024-2025 Aid Year, Housing Type isn't reported by the student using the FAFSA. The list of values is the same used in FAFSA/ISIR for 2023-2024 Aid Year. For more information, see Student Planned Housing Type for the 2024-2025 and Future Aid Years (Doc ID 2990217.1) at https://support.oracle.com.

Budget Components

To create budgets, you first create budget categories—budget components such as tuition, housing, books, transportation, and fees. Then you create individual budget items within each category. Budget items have different budget amounts to account for different student needs. For example, within the housing budget category, you might have budget items for students living with parents or relatives, living on campus, and living off campus. The amount for each item might differ depending on whether the student is enrolled part time or full time. After you define budget items, you define criteria for determining which budget item within a budget category a student is assigned using budget formulas and budget trees.

After defining budget components, you can create predefined budgets to suit groups of similar students, such as undergraduate freshmen or married graduate students. These predefined budgets are budget groups and they can be detailed or generic. Detailed budget groups permit you to assign budgets to students by using predefined budget categories, budget items, and budget amounts. Alternatively, generic budget groups permit you to have the system determine the student's budget by using predefined budget categories along with budget formulas and budget assignment controls. When you use generic budget groups, the system assigns budget amounts to the student by invoking budget processing rules tied to budget categories and determining which criteria the student meets. You can use generic budget groups when creating students' budgets either in batch or online.

To create student budgets in batch or online for an individual student, the system can use either the same rules as in batch or the predefined budget groups. In the Assign Budgets component (BUDGET_ASSIGNMENT), establish the career and term of a budget, and then list

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the budget categories that should be assigned to students for each term. If you define generic budget groups, you can use a generic budget group to assign categories instead of adding budget categories individually. For background processing only, define the budget run control, which selects the careers and terms for which to assign budgets, as well as work table maintenance options.

Budget Assignment Formulas

Budget equations, formulas, and trees provide criteria for selecting which students receive a particular budget item. If you do not define a budget equation, formula, or tree for a budget item, students do not receive that budget item unless you assign it manually. Budget formula selection criteria are based on the values from selected database fields. Housing formulas, for example, could calculate various housing amounts for on-campus, off-campus, parent-supplied, and married housing.

Budget Equations can be created in the Equation Editor to define your school's criteria to determine what values should be assigned to students for Budget Items as well as used to determine what budget item should be assigned to specific students.

Define a budget equation or formula for all budget items that don't vary based on postal code (distance). To select budget items based on distance (such as transportation costs), use a budget tree.

Defining Budget Components

To set up budget components, use the Budget Categories (BUDGET_CATG_TBL), Budget Items (BUDGET_ITEM_TABLE), Budget Equations (EQUATION_EDITOR), Budget Formulas (BUDGET_FORMULA), and Budget Trees (BUDGET_TREE_TBL) components. Use the BUDGET_ITEM_TABLE component interface to load the data into the tables for this component interface.

This section lists common elements and discusses how to:

- Define budget categories.
- Define budget equations.
- Define budget items.
- Define budget formulas.
- Define budget formula groups.
- Define budget assignment trees.

Common Elements Used in This Section

Field or Control	Description
Formula Number	Displays a system-generated number assigned to each formula that you add. Each effective-dated row has a separate sequence of formula numbers.
Processing Order	This order ranks each budget item relative to the other items within the budget category. The system evaluates the budget items against the student's record and assigns budget items in the order defined by this rank.

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Field or Control	Description
Amount	Displays the budget amount for the selected budget item code.

Pages Used to Define Budget Components

Page Name	Definition Name	Navigation	Usage
Create Budget Categories	BUDGET_CATG_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Categories**	Define the various components of your institutional budget, such as tuition, books, and transportation.
Copy Budget Category Data	BUDGET_CATG_COPY	Click the **Copy Setup Data** button on the Create Budget Categories page.	Copy setup data on the Create Budget Categories page from one combination of academic institution and aid year to another.
Equation Editor	EQUATION_EDITOR	**Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Editor**	Define an equation and application prompts using the **FA Budget Item Amount** and **FA Budget Item Code** Application Prompt IDs.
Create Budget Items	BUDGET_ITEM_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Items**, and then **Create Budget Items**	Define budget items, term amounts, and Pell annual amounts assigned to a student for each budget category.
Copy Budget Item Data	BUDGET_ITEM_COPY	Click the **Copy Setup Data** button on the Create Budget Items page.	Copy information on the Create Budget Items page from one combination of academic institution, aid year, and budget item category to another.
Budget Formula	BUDGET_FORMULA	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Formulas**, and then **Budget Formula**	Create formulas that define eligible students for a budget item.

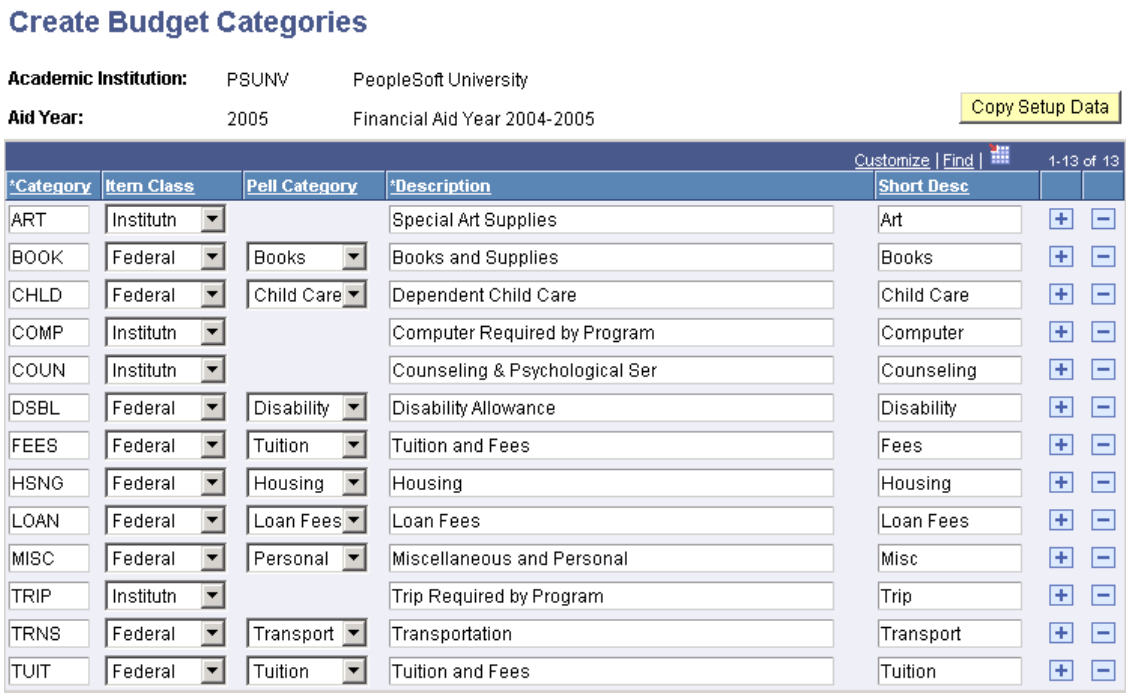
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Page Name	Definition Name	Navigation	Usage
Copy Budget Formula Data	BDGT_FORM_COPY	Click the **Copy Setup Data** button on the Budget Formula page.	Copy setup data on the Budget Formula page from one academic institution, aid year, and budget category combination to another.
Budget Formula Groups	BUDGET_FORMULA_GRP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Formulas**, and then **Budget Formula Groups**	Designate the student groups applicable to the formula in progress. For example, you can have special awarding considerations for your student athletes who are also honor students.
Create Budget Trees	BUDGET_TREE_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Trees**, and then **Create Budget Trees**	Assign a particular detailed value, or tree node, to a budget item.

Defining Budget Categories

Access the Create Budget Categories page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Categories**).

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



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Field or Control	Description
Category	Enter a four-character code for each budget component. All academic careers share budget categories. You must create a tuition budget category called *TUIT* to select the **Match Fees** check box on the Disbursement Rules: Global - Indicators page. When you select this check box, the authorization process automatically checks for the amount of tuition using the TUIT budget category.
Item Class	The system calculates the federal COA and institutional COA (optional) by totaling the budget categories—and, therefore, budget items—designated for each COA. A budget category's item class designates whether the budget category contributes to the federal and institutional COA or contributes only to the institutional COA. The federal COA is the sum of budget amounts for budget categories designated as *Federal.* The institutional COA is the sum of budget amounts for budget categories designated as either *Federal* or *Institutional.* For example, books are a federal budget category and count towards both the federal COA and institutional COA, while a computer is an institutional budget category and counts only towards the institutional COA. Leave this field blank if the budget category does not contribute to either the federal or institutional COA.

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Field or Control	Description
Pell Category	This field is available only for budget categories with an item class of Federal. The Pell category associates this budget category (and the category's budget items) with the Pell budget (Pell Annual COA), the Pell Less Than Half-Time budget (Pell LTHT Annual COA), and Alternate Pell budget (Alternate Pell Annual COA). If a budget category does not count toward the Pell budget, Pell LTHT budget, or Alternate Pell budget, leave this field blank. Otherwise, select from the following: *Books:* Designates the cost of books. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation. *Child Care:* Designates dependent child care costs. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA (if allowed), and the Alternate Pell COA calculation. *Disability:* Designates disability-related costs for a student. Budget items with this Pell category are included in the Pell COA calculation and Alternate Pell COA calculation. *Fees:* Designates a fee charged by the institution. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation. *Housing:* Designates housing costs. Budget items with this Pell category are included in the Pell COA calculation. *Loan Fees:* Designates estimated loan fee costs if the student receives loans. Budget items with this Pell category are included in the Pell COA calculation. *Personal:* Designates an estimated amount for miscellaneous personal costs. Budget items with this Pell category are included in the Pell COA calculation. *Transport:* Designates transport costs. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation. *Tuition:* Designates tuition costs only (does not include student activity fees and other types of fees). Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation and the Alternate Pell COA calculation. **Note:** If your institution charges fees in lieu of tuition or charges enrollment-based fees in addition to tuition charges, assign these tuition fees a Pell category of Tuition. The alternate Pell cost of attendance is calculated by summing the budget items with Pell categories of Tuition, Child Care, and Disability.

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Field or Control	Description
Copy Setup Data	Click to access the Copy Budget Category Data page, from which you can copy the information from one combination of academic institution and aid year to another.

Related Topics

- Awarding Pell Grants for the 2022-2023 and 2023-2024 Aid Years
  This section provides an overview of Pell Grant awarding and discusses how to:

Defining Budget Equations

Access the Equation Editor page (**Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Editor**).

Field or Control	Description
Application Prompt ID	Only use **FA Budget Item Amount** or **FA Budget Item Code** when creating equations for Cost of Attendance Budgets.

When you create equations for the FA Budget Item Amount prompt, please note that your equations need to assign Global Variables with numeric values for these fields:

- BUDGET_ITEM_AMT (required)
- PELL_ANN_AMOUNT (optional)
- PELL_LHA_AMOUNT (optional)

When you create equations for the FA Budget Item Code prompt, please note that your equations need to assign a Global Variable with a string value for BUDGET_ITEM_CODE and that is also an **Item Code** that exists on the BUDGET_ITEM_TBL.

The Budget assignment processes pass the following fields, which are also key fields on STNDT_BDGT_ASGN:

- EMPLID
- AID_YEAR
- INST
- STRM

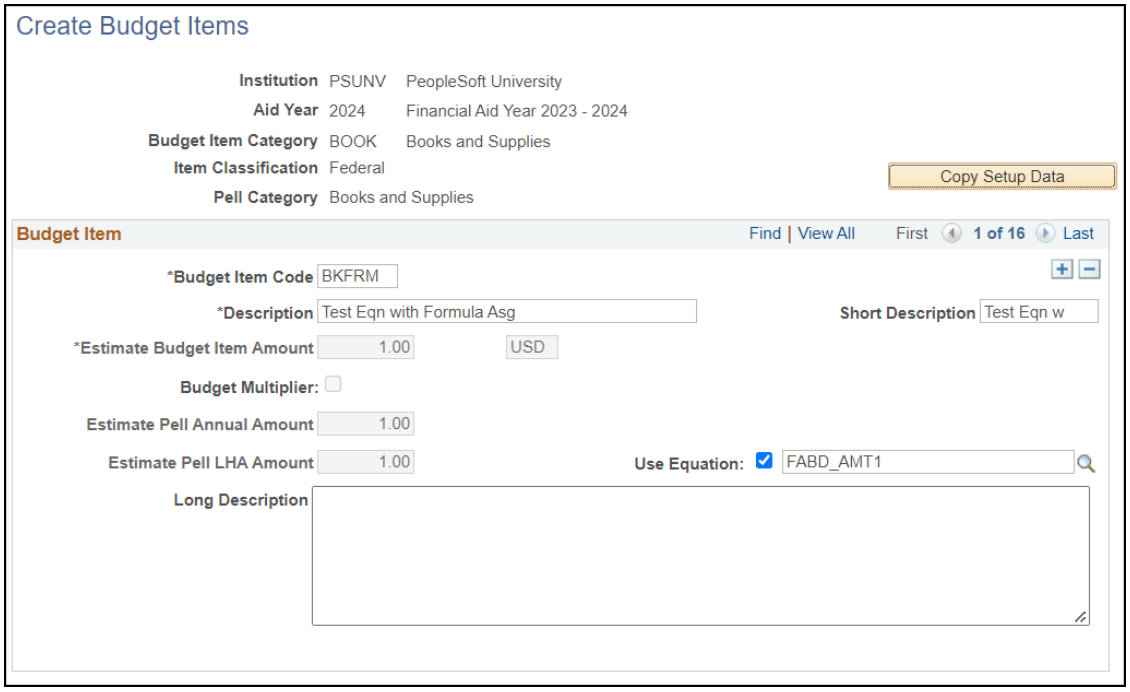
See Campus Solutions Application Fundamentals: Defining an Equation for more complete information.

Defining Budget Items

Access the Create Budget Items page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Items**, and then **Create Budget Items**).

This example illustrates the fields and controls on the Create Budget Items page. You can find definitions for the fields and controls later on this page.

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You can have multiple budget items for each category. If the budget amounts within a category differ depending on the type of term, you must create a separate budget item for each term.

Field or Control	Description
Copy Setup Data	Click to access the Copy Budget Item Data page and copy the information on this page from one combination of academic institution, aid year, and budget item category to another.
Budget Item Code	Enter a code to identify budget items within a category. For example, the Housing budget category could have separate budget items for students living on campus, off campus, with parents, and in married student housing.
Budget Item Amount	Enter the amount per term for this budget item. Financial aid budgets, except for Pell budgets, are term-specific, so each budget item should reflect the term amount for that budget item.

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Field or Control	Description
Budget Multiplier	Select to multiply the budget item amount by a student's value for a particular field. Then select a field from the available list. The system takes the budget item amount and multiplies it by the value of the budget multiplier field. The available budget multiplier fields are: COURSE_LD_PCT FA_NUMBER_OF_WEEKS FA_TERM_EFFSEQ FA_UNIT_ANTIC FA_UNIT_COMPLETED FA_UNIT_CURRENT FA_UNIT_IN_PROG REFUND_PCT UNIT_TAKEN_FA UNIT_TAKEN_FA_CL WEEKS_OF_INSTRUCT Use the budget multiplier to build budget items on a per unit or per week basis. For example, if you charge tuition based on the number of units that a student takes, you can enter the per unit amount as the budget item amount. Then select the **Budget Multiplier** check box and select a field that represents units (options include FA units taken, units anticipated, units in progress, and current units). The budget multiplier can also reduce the budget item amount for students who are not taking a full load or who receive a refund. Because these field values are a percentage, they can reduce the budget item amount. For example, to adjust a books budget item based on the student's course load, you select the **Budget Multiplier** check box and select *COURSE_LD_PCT* as the multiplier. Full-time students would receive 100 percent of the budget item amount, three-quarter-time students would receive 75 percent, and so on.
Pell Annual Amount	Available only for budget categories assigned to a Pell category on the Create Budget Categories page. Enter the annual—not term—Pell budget for this item. The budget multiplier does not affect the Pell annual amount. **Note:** Because graduate students are not eligible for Pell Grants, leave this field blank for graduate students.
Pell Less Half Annual Amount	Available only for budget categories assigned to a Pell category on the Create Budget Categories page. Enter the annual—not term—Pell budget for this item. Displays the Pell amount for less than half-time enrollment.

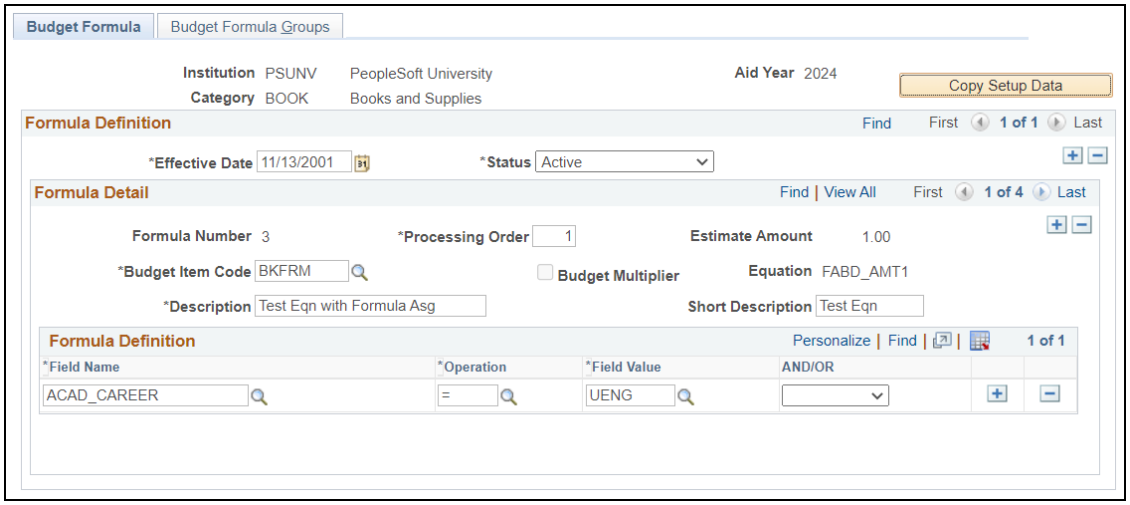
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Field or Control	Description
Use Equation	Select this check box and user-defined equation from the list of values to use the Equation Engine to determine the **Budget Item** amounts. **Note:** Only equations created using **Application Prompt ID** of **FA Budget Item Amount** are available in the list of values. When you select **Use Equation**, the field labels of **Budget Item Amount**, **Pell Annual Amount**, and **Pell LHA Amount** change to **Estimate Budget Item Amount**, **Estimate Pell Annual Amount**, and **Estimate Pell LHA Amount**, respectively, and make those fields and the Currency and **Budget Multiplier** fields read-only.

Defining Budget Formulas

Access the Budget Formula page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Formulas**, and then **Budget Formula**.

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



Effective Date

The **Effective Date** field on this page dictates which effective-dated translate table to use when retrieving valid values for each **Field Name** used in the **Formula Definition.**

> **Note**
>
> Always review Budget formulas when valid field values are updated. A new effective-dated row may be necessary to use the proper field values.

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Formula Detail

Field or Control	Description
Copy Setup Data	Click to access the Copy Budget Formula Data page and copy setup data on the Budget Formula page from one academic institution, aid year, and budget category combination to another.
Budget Item Code	Select the budget item for which you are defining a formula.
Budget Multiplier	Selected if you selected it on the Create Budget Items page. The multiplier field that you selected also appears.
Equation	Displays the amount equation associated to the **Item Code**. If **Item Code** is associated with an amount equation, the **Amount** field displays as **Estimate Amount**.

Formula Definition

Create a budget formula to define a student's eligibility for this item. For example, if the student must be an undergraduate, the field name would be **ACAD_CAREER,** the operation would be = (equals), and the field value would be *UGRD.*

Field or Control	Description
Field Name	A set of predefined fields that enable you to compose selection criteria to assign budget items. The Values for Field Name subtopic lists the available values. **Note:** If you select *STDNT_GROUP* as the field name, use the Budget Formula Groups page to specify field values and operations for the *STDNT_GROUP* criteria.
Operation	Indicates the relationship between the field name and its field value used to select students. The Available Operations subtopic describes the functions of the available values.
Field Value	Select a field value that indicates the required value of the field from **Field Name.** The system displays only field values related to the selected field name.
AND/OR	Select an AND/OR connector to indicate that other field names, statements, or criteria must be included in this formula. For example, a student must be an undergraduate AND have full time enrollment for a book allowance; the graduate student must be a graduate AND be enrolled in fall OR spring terms to be eligible for a study trip allowance. If you create conditional statements, the system processes only simple OR statements. Each conditional statement must be mutually exclusive. **Note:** Do not select an AND/OR connector in the last row of your formula.

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Values for Field Name

This table lists all available field names from which you compose selection criteria to assign budget items.

Select only field names that are valid for the particular aid year.

Budget Formula Field Names		
ACADEMIC_LOAD	CUR_PARTICIPANT_2	INTERESTED_IN_WS
ACAD_CAREER	CUR_PARTICIPANT_3	ISIR_STU_ENRL_STAT
ACAD_GROUP_ADVIS	CUR_PARTICIPANT_4	MARITAL_STAT
ACAD_LEVEL_BOT	DEPNDNCY_STAT	NSLDS_LOAN_YEAR
ACAD_LEVEL_PROJ	EMPLID	NUMBER_IN_FAMILY
ACAD_LOAD_APPR	END_DATE	POSTAL
ACAD_PLAN	ENROLL_CURNT_SUM	PROCESSING_MODE
ACAD_PLAN_TYPE	ENROLL_FALL	REFUND_CLASS
ACAD_PROG_PRIMARY	ENROLL_NEXT_SUM	REFUND_PCT
ACAD_SUB_PLAN	ENROLL_SPRING	REFUND_SCHEME
ADMIT_TERM	ENROLL_WINTER	REFUND_SETID
ADVISOR_ID	EXT_ORG_ID	RESIDENCY
ADVISOR_ROLE	FA_LOAD	SFA_INTRSTD_IN_WSL
AID_YEAR	FA_LOAD_CURRENT	SPORT1
APP_STATE_RESIDENCE	FA_NUMBER_OF_WEEKS	SPORT2
ATH_PARTIC_CD1	FA_UNIT_ANTIC	SPORT3
ATH_PARTIC_CD2	FA_UNIT_COMPLETED	SPORT4
ATH_PARTIC_CD3	FA_UNIT_CURRENT	SRVC_IND_CD
ATH_PARTIC_CD4	FA_UNIT_IN_PROG	START_DATE
BUDGET_GROUP_CODE	FIN_AID_FED_EXCPT	STATE_RESIDENCE
BUDGET_STATUS	FIN_AID_FED_RES	STDNT_GROUP
CAMPUS	FIN_AID_ST_EXCPT	STRM
CAMPUS_FA	FIN_AID_ST_RES	STUDY_AGREEMENT
COMMITTEE_ID	FORM_OF_STUDY	TERM_TYPE
COUNTRY	HOUSING_TYPE	UNT_TAKEN_FA
COURSE_LD_PCT	INSTITUTION	UNT_TAKEN_FA_CL
CUR_PARTICIPANT_1	INTERESTED_IN_SL	WEEKS_OF_INSTRUCT

Available Operations

This table describes the operations that are available to establish the relationship between the field name and its field value used to select students.

Operation	Description
<	Less than
<=	Less than or equal to
<>	Not equal to

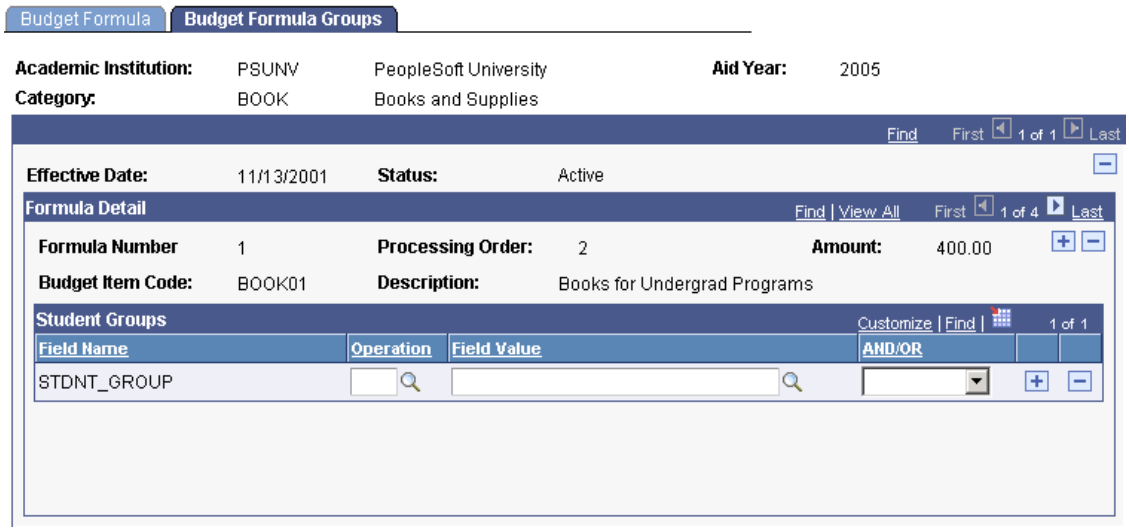
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Operation	Description
=	Equal
>	Greater than
>=	Greater than or equal to
BLK	Is blank
LIK	Like

Defining Budget Formula Groups

Access the Budget Formula Groups page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Formulas**, and then **Budget Formula Groups**).

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



Use this page only if you indicate the field name STDNT_GROUP within the **Formula Definition** group box on the Budget Formula page.

Field or Control	Description
Operation	Enter the relationship between the student group and its value.
Field Value	Enter the value for the student group.
AND/OR	Select an AND/OR connector to include more than one student group in the criteria statement. For example, the student must be an athlete AND an honor student. Do not select an AND/OR connector in the last row of your formula.

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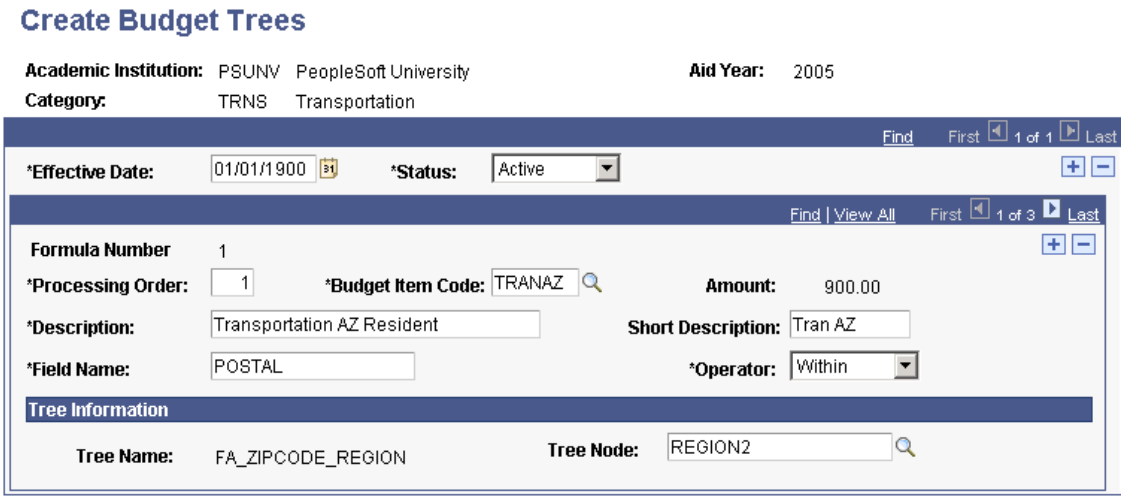
Related Topics

- Student Records: Managing Student Groups

Defining Budget Assignment Trees

Access the Create Budget Trees page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Trees**, and then **Create Budget Trees**).

This example illustrates the fields and controls on the Create Budget Trees page. You can find definitions for the fields and controls later on this page.



Financial Aid delivers a tree that contains all of the postal codes in the United States, which you can use to assign budget amounts based on geographic distance to your institution.

Important

The FA_ZIPCODE_REGION Budget Tree is delivered with the system. Changing the delivered tree or adding a budget tree requires code changes to accommodate a new tree name and ongoing system support. To create an institution-specific tree without making coding changes, use the same name as the delivered tree.

Field or Control	Description
Budget Item Code	Select the budget item for which you are using a tree to determine the student's eligibility.
Field Name	Enter the field name against which to compare tree values. The default value is *Postal*, which indicates that postal codes in the tree should be compared against the student's postal code.

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Field or Control	Description
Operator	Select *Within* or *Not Within* to have the system look within or outside of the field name, in or out of the postal code in this example. For example, you assign 400.00 USD to students whose postal region is within Region 2. Then, you assign 600.00 USD to all students whose postal region is not within Region 2.
Tree Name and **Tree Node**	Displays the name and node of the tree being used to determine whether the student should be assigned this budget amount. The default tree is *FA_ZIPCODE_REGION*.

Creating Budget Groups

To set up budget groups, use the Budget Groups component (BUDGET_GROUP_TABLE). Use the BUDGET_GROUP_TABLE_CI component interface to load the data into the tables for these component interfaces.

Budget groups define a budget for groups of similar students, such as undergraduate freshmen, out-of-state residents, or married graduate students. You can use a budget group to assign a term budget online to a single student quickly. For example, you can create a budget group for undergraduate in-state residents for the 2005 spring term. Then you can create a term budget for spring 2005 using this budget group for a resident undergraduate student on the Student Budget Maintenance page.

This section discusses how to:

- Define detailed budget groups.
- Define generic budget groups.

Pages Used to Create Budget Groups

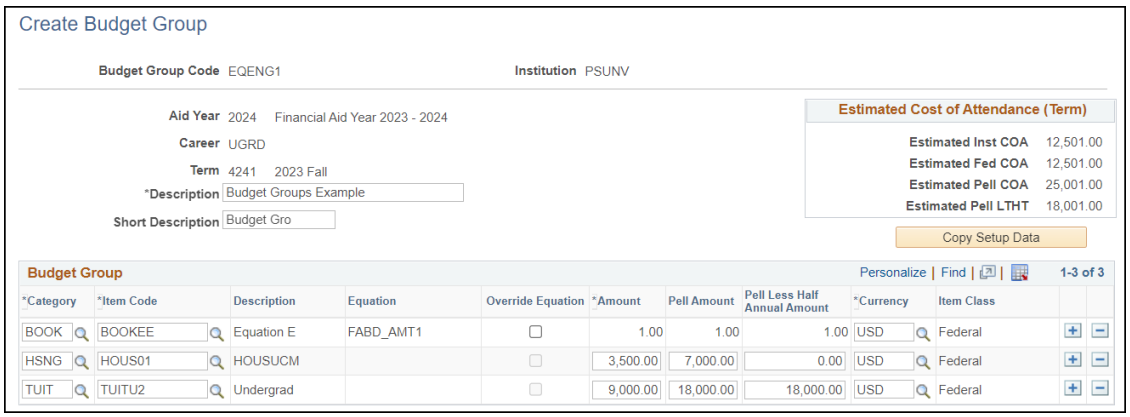
Page Name	Definition Name	Navigation	Usage
Create Budget Group	BUDGET_GROUP_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Groups**, and then **Create Budget Group**	Group budget items and associate the budget group with selected students within a specific aid year, career, and term.
Copy Budget Group Data	BDGT_GROUP_COPY	Click the **Copy Setup Data** button on the Create Budget Group page.	Copy setup data on the Create Budget Group page from one budget group code, academic institution, aid year, academic career, and term combination to another.

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Defining Detailed Budget Groups

Access the Create Budget Group page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Groups**, and then **Create Budget Group).**

This example illustrates the fields and controls on the Create Budget Group page. You can find definitions for the fields and controls later on this page.



Cost of Attendance (Term)

The values in this group box change when you add or subtract budget items or alter budget item amounts.

> **Note**
>
> The **Estimated** field labels are used due to **Item Codes** potentially being linked to amount equations. Students can be assigned the same **Budget Group** with **Item Codes** of varying amounts.

Field or Control	Description
Estimated Inst COA (estimated institutional cost of attendance)	Displays the sum of all budget items assigned to this budget group that have an item class of *Federal* or *Institutional.* The Packaging routine uses this calculated COA for the student during awarding if you designate institutional methodology as the packaging methodology at the financial aid item type level.
Estimated Fed COA (estimated federal cost of attendance)	Displays the sum of all budget items assigned to this budget group that have an item class of *Federal.* The Packaging routine uses this calculated COA for the student during awarding if you designate federal methodology as the packaging methodology at the financial aid item type level.

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Field or Control	Description
Estimated Pell COA (estimated Pell cost of attendance)	Displays the sum of all Pell amounts from the budget items assigned to this budget group. The Packaging routine uses this calculated COA for the student when awarding Pell Grants.
Estimated Pell LTHT (estimated Pell less than half-time)	Displays the sum of all Pell amounts from the budget items assigned to this budget group. The Packaging routine uses this calculated COA for the student when awarding Pell Grants for students enrolled less than half-time.

Other Page Elements

Field or Control	Description
Copy Setup Data	Click to access the Copy Budget Group Data page, and copy the setup data on this page from one budget group code, academic institution, aid year, academic career, and term combination to another.
Category and **Item Code**	Select the budget category and item code to assign to this group.
Equation	Displays amount equation for the **Item Code**, if applicable.
Override Equation	Select to override the equation amount and activate the amount fields.
Amount	Displays the appropriate budget item amount. You can override this amount for this budget group only. This is a per term amount.
Pell Amount	Displays the appropriate budget item amount for the Pell budget. You can override this amount for this budget group only. This is an annual amount.
Pell Less Half Annual Amount (Pell less than half time annual amount)	Displays the less than half-time Pell annual amount.
Currency	Displays the correct currency type for the **Amount** and **Pell Amount** fields. You can change the currency.
Item Class	Indicates whether the budget category contributes to the federal and institutional COA or contributes only to the institutional COA.

Defining Generic Budget Groups

Access the Create Budget Group page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Groups**, and then **Create Budget Group**).

If you plan to use background budget assignment, you can create a generic budget group code without specifying categories, item types, or amounts. This budget group code acts as a template during background budget assignment. Based on the budget formulas for which the student qualifies and the budget assignment table, the system automatically builds a budget for the student.

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To create a generic budget group:

1. Add a new budget group code.
2. Enter a description and short description.

You do not have to populate the fields in the grid. You can leave them blank and save the record.

Preparing for Background Budget Assignment

After you establish your institution's budget categories, budget items, budget formulas, budget amount equations, and trees, and budget groups, you must complete three more steps before you can use online or batch background budget assignment. If you are not going to assign budgets in batch, you do not have to complete these three steps.

To set up background budget assignment, use the Budget Assignment (BUDGET_ASSIGNMENT) and Budget Assignment Run Control (BUDGET_ASGN_RUNCTL) components.

This section discusses how to:

1. Specify careers.

   Specify the careers for which you want to assign budgets.
2. Assign automated budget categories.

   List the budget categories that should be used to create a term budget for each term.
3. Create budget assignment run controls.

   Specify the academic careers and terms to which you want to assign budgets during background budget assignment.

Related Topics

- Assigning Budgets in Batch
  Use batch budget assignment to create student budgets using defined budget assignment rules. Batch budget assignment builds budgets term by term because certain budget categories, such as fees, do not apply to all terms. Budgets are only built for students who have Financial Aid Terms built, and only for those terms for which the **Budget Required** field is set to *Assgn Bdgt* (assign budget).
- Assigning Budgets Online
  Use online background budget assignment to generate budgets for individual students, using the same rules as batch background budget assignment.

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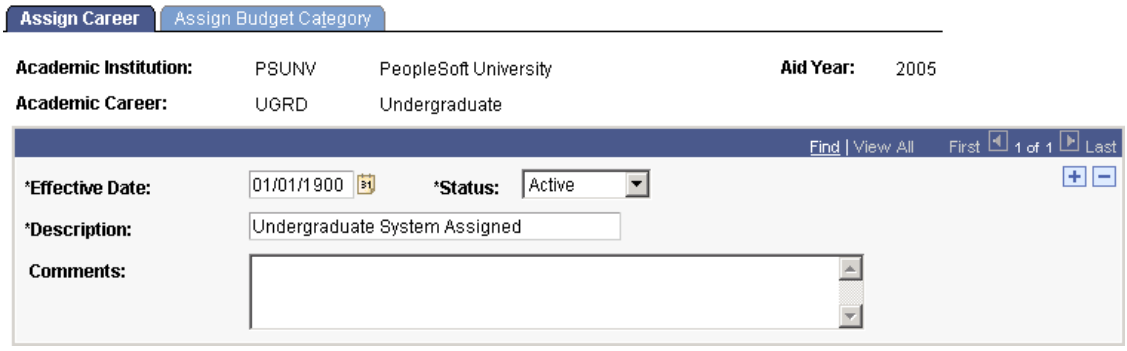
Pages Used to Prepare for Background Budget Assignment

Page Name	Definition Name	Navigation	Usage
Assign Career	BUDGET_CONTROL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Assignment**, and then **Assign Career**	Specify a career for which you want to assign budgets during background budget assignment by establishing an effective-dated row for the career. You must add additional careers from the search page.
Assign Budget Category	BUDGET_ASSIGN_CATG	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Assignment**, and then **Assign Budget Category**	Assign budget categories to each term that is valid for the combination of career, aid year, and academic institution.
Create Budget Run Controls	BUDGET_ASGN_RUNCTL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Assignment Run Control**, and then **Create Budget Run Controls**	Select which careers and terms to use when running background budget assignment.

Specifying Careers

Access the Assign Career page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Assignment**, and then **Assign Career**).

This example illustrates the fields and controls on the Assign Career page.



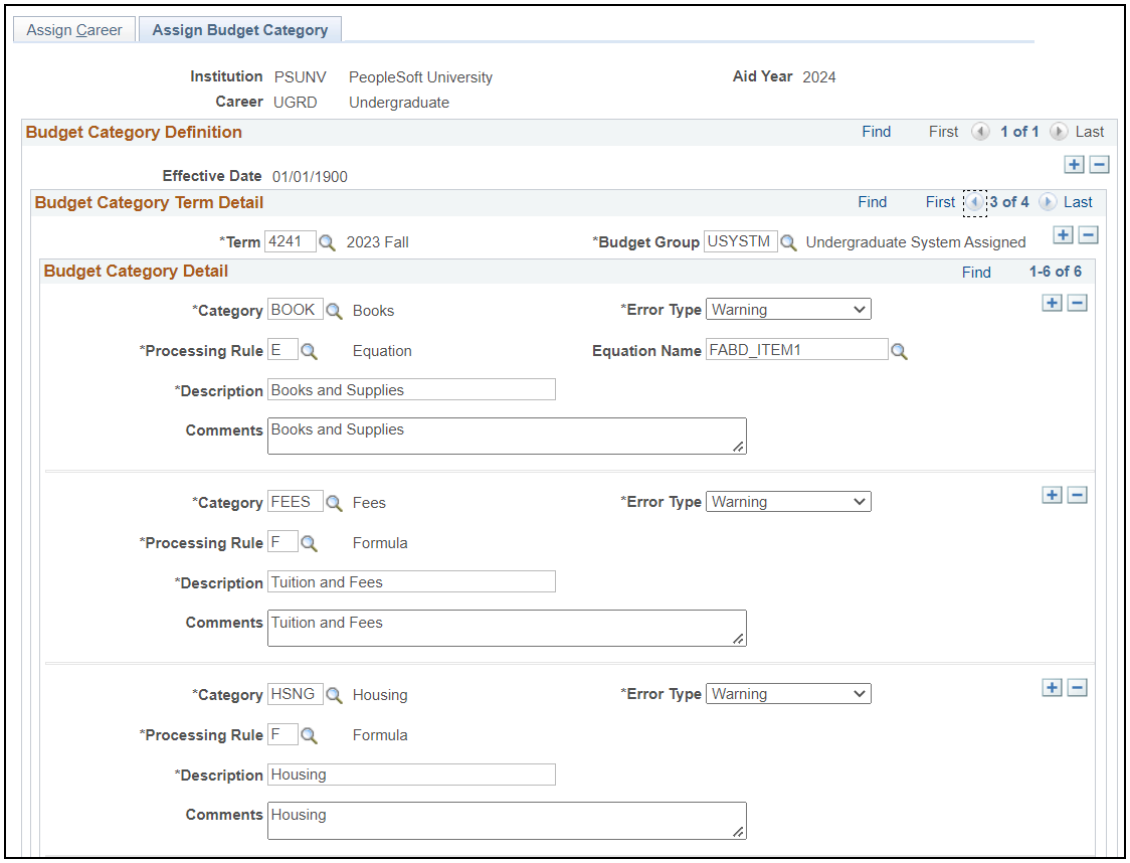
Establish an effective-dated row for each combination of career, aid year, and academic institution to which you want to assign budgets using the Student Budget Assign process (FAPBDGTS).

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Assigning Automated Budget Categories

Access the Assign Budget Category page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Assignment**, and then **Assign Budget Category**).

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



If you have not set up generic budget groups to use with background processing, you must list each budget category individually. During background budget assignment, the system assigns the appropriate budget item and amount to each student using the budget formulas or trees that you set up for each budget item.

Field or Control	Description
Bdgt Group (budget group)	If you have established generic budget groups for batch budget processing, enter the budget group code. The page automatically displays the budget categories that you assigned to this budget group.

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Field or Control	Description
Category	Enter the budget category to assign to the selected term's budget. Make sure that the category is valid for the selected term. For example, a summer term might not include housing costs, while a fall term includes housing costs.
Error Type	Select the action to take when the system encounters an error in assigning a value to a student for this budget category. Values are: *None:* The system does not take any action when it encounters an error. *Skip:* The system skips the record for which it encountered the error and does not assign a value to that record. *Stop:* The system stops all processing when it encounters an error. *Warning:* The system warns you of the error but continues processing. No budget item is assigned to the student for the budget category for which the system encountered the error. The student receives a zero dollar amount for that budget category and a warning that the student failed the budget assignment criteria for that budget category. For example, you might assign the child care budget category a skip error type because not all students are parents and, therefore, would not be eligible for a dependent child care allowance. You might assign the fees budget category a stop type because all students need to have a particular fee amount in their budgets. You might assign a warning for the books budget category based on the student's career. If the career does not match the book criteria defined in the budget assignment setup, the system does not assign a book budget item and displays a warning. You can then reevaluate the assignment criteria to ensure correct definition.

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Field or Control	Description
Processing Rule	Select whether a formula, tree, or other assigned possibilities—such as tuition calculations—determine the amount assigned to the student for this budget category. Values are: *E - Equation Based Calculation:* The system uses an equation to determine the budget item amount assigned to the student. *F - Formula Based Calculation:* The system uses a budget formula to determine the budget item amount assigned to the student. *N - Tree Nodes:* The system uses a budget tree to determine the budget item amount assigned to the student. When you select this option, a **Name** field appears and displays the name of the tree used to define the budget category. *T - Tuition:* The system calculates the student's tuition budget item amount by running the Tuition Calculation routine. The Tuition Calculation routine can be run either by Student Financials or Financial Aid; the **Use Actual/Projected Tuition** check box on the Create Budget Run Controls page specifies which Tuition Calculation routine to use.
Equation Name	If using the *Equation Based Calculation*, select the user-defined Budget Item Code equation to use to determine the budget item code assigned to the student. The equations available for selection are the ones set with the **Application Prompt ID** of **FA Budgets Item Code** on the **Equation Editor** page.
Name	If using *Tree Nodes*, displays the name of the tree used to determine which budget item is assigned to a student.
Description	You can edit the default description to specify how the rule is used. This can be different from the description on the Create Budget Categories page. For example, the book budget category might have a description of Books on the Create Budget Categories page, but be listed as *Book Allowance Fall 2002* on this page.
Comments	The default value is the budget category description, but you can edit the description to provide more information about the processing of this budget category.

Use the top set of scroll arrows to view rows with different effective dates. Use the middle set of scroll arrows to view different terms. Use the bottom set of scroll arrows to view additional budget categories for a specific term and budget group combination.

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Creating Budget Assignment Run Controls

Access the Create Budget Run Controls page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Assignment Run Control**, and then **Create Budget Run Controls).**

This example illustrates the fields and controls on the Create Budget Run Controls page. You can find definitions for the fields and controls later on this page.



Define each combination of career and term in its own row.

Field or Control	Description
Career	Select the career of the students for which the system assigns budgets when you run the Student Budget Assign process (FAPBDGTS). To include another career, insert another row.
Term	Select the term for which the system assigns budgets when you run the Student Budget Assign (FAPBDGTS) process. To run the process for multiple terms for a career, insert another row.
Use Actual/Projected Tuition	Select to use the tuition value that the tuition calculation in Student Financials generates based on tuition group rules that incorporate Student Records data. If Student Financials has not yet calculated tuition for this term and this check box is selected, the tuition returned is 0.00 USD. If the check box is cleared, then Financial Aid calculates the student's tuition based on rules established in Student Financials for financial aid tuition groups. The tuition amount calculated by Financial Aid is only an estimated tuition amount.

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Field or Control	Description
Delete and **Status**	Select to have the system delete records in the work table according to the status that you select. The **Status** field appears when you select this check box. Values for the **Status** field are: *A—Delete All:* The system deletes all records in the work table. *E—Those with Errors:* The system deletes only the records in the work table that have errors. *I—Those in Progress:* The system deletes the records in the work table that are still in progress. These are records that the system has not moved to the student's budget tables and is still processing.
Reset and **Status**	Select to have the system reset the **Budget Required** field on the Financial Aid Info page. The **Status** and **Value** fields appear when you select this check box. Values for the **Status** field are: *A—Reset All:* The system resets the **Budget Required** field for all records in the work table. *E—Those with Errors:* The system resets the **Budget Required** field only for the records in the work table that have errors. *I—Those in Progress:* The system resets the **Budget Required** field on FA Term for the records in the work table that are still in progress. These are records that the system has not moved to the student's budget tables and is still processing.
Value	Appears when you select the **Reset** check box. Specify the value to set the **Budget Required** field to on the student's Financial Aid Term record for each processed term. Values include: *E—Error During Budget Assignment:* An error occurred during the Budget Assignment process. *I—In Progress:* Budget assignment is currently in progress for this student for the given terms. *N—No Budget Assignment:* The system sets the student's **Financial Aid Term Budget Required** field to this value, and selects the student the next time that you generate batch budgets. *Y—Yes Assign Budget:* The system sets the student's **Financial Aid Term Budget Required** field to this value, and selects the student the next time that you generate batch budgets.

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> **Note**
>
> The Stdnt Bdgt Assign - Delete (student budget assignment - delete) process (FAPBDGTD) uses the options that you define in the **Table Maintenance Options** group box.

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5

Setting Up Packaging Basics

Understanding Packaging Basics

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

This section lists prerequisites and common elements and discusses:

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

Related Topics

- Using Equation Engine in Packaging
  Equation Engine can read any table for which you have security access and can perform various arithmetic operations and external call subroutines.
- Creating Equity Item Type Groups
  To set up equity item type groups, use the Packaging Equity Item Type component (PKG_EQUITY_GROUP).
- Creating Related Item Type Groups
  This section provides an overview of related item type groups and discusses how to define related item type groups.
- Defining Packaging Plans
  This section provides an overview of packaging plans setup and discusses how to:

Prerequisites

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

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

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

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- Have a list of the rating components used by the admissions office at your institution.
- Know what the various rating components are used for and what names have been used for them in PeopleSoft Recruiting and Admissions.

  See Recruiting and Admissions: Setting up Applicant Evaluation

  See Recruiting and Admissions: Setting Up Student Response.

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

See Viewing and Editing Equations.

Common Element Used in Packaging Basics

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

Award Adjustment Reasons

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

Early Financial Aid Offers

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

Awarding versus Packaging

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

Financial Aid Item Types

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

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

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

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

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

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

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

Related Topics

- Student Financials: Understanding Student Financials General Setup

Defining Packaging Variables

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

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

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

Understanding Packaging Variables

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

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

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each career. You must have a different group of package rating components for each career that utilizes package rating components in packaging plans. Enter the admissions rating components and GPA types in any order, but keep track of which items you enter for each package rating component for future reference.

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

To enter package rating component information manually:

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

To enter package rating component information in batch:

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

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

Pages Used to Define Packaging Variables

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

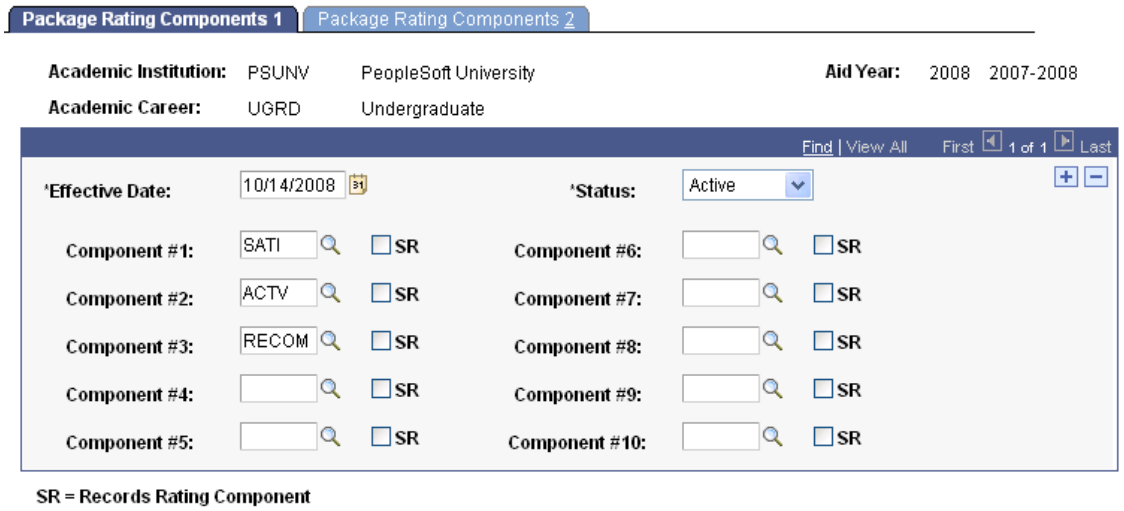
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Page Name	Definition Name	Navigation	Usage
Assign Packaging Rating Components	RUNCTL_FA_PKG_RC	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Packaging Ratings**, and then **Assign Packaging Rating Components**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

Defining Package Rating Components

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

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



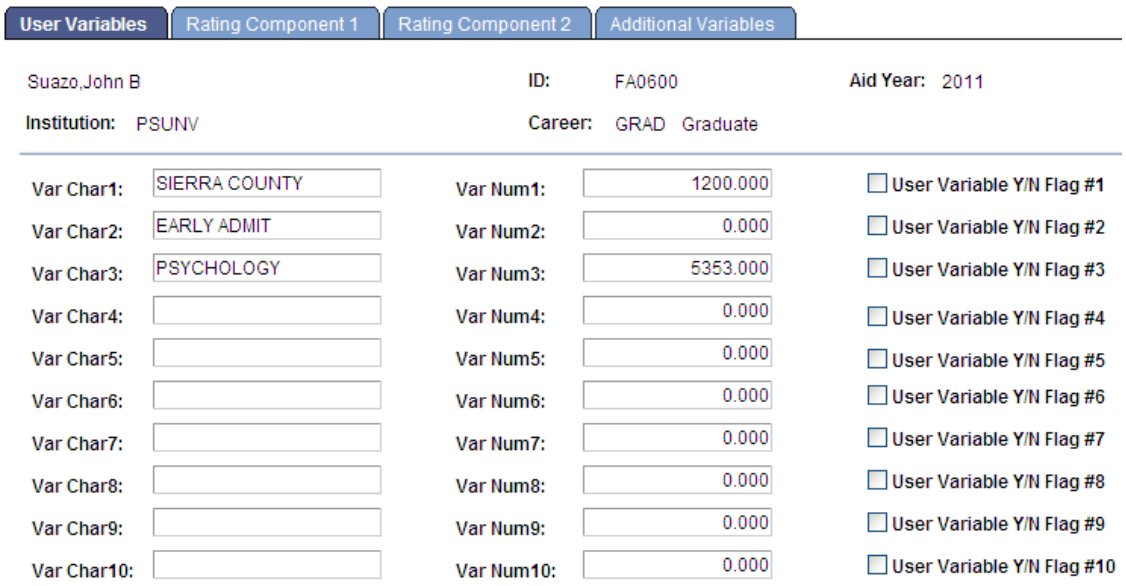
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Field or Control	Description
Component #1-20	Enter the admissions rating component or GPA type that you want to use as a package rating component. You can enter values in any fields in any order. **Note:** To select a GPA type, you must first select the **SR** check box next to that field.
SR (student records)	Determines what values you can select in the **Component** field. Select to have only GPA types available for selection.

Entering Institution-Specific Variables

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

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



Field or Control	Description
Var Char 1-10 (character variable)	Enter any alphabetic characters such as words, phrases, or symbols. For example, you can use a character variable to define a particular student interest, such as an interest in psychology, that helps determine eligibility for a scholarship, such as a psychology merit scholarship.

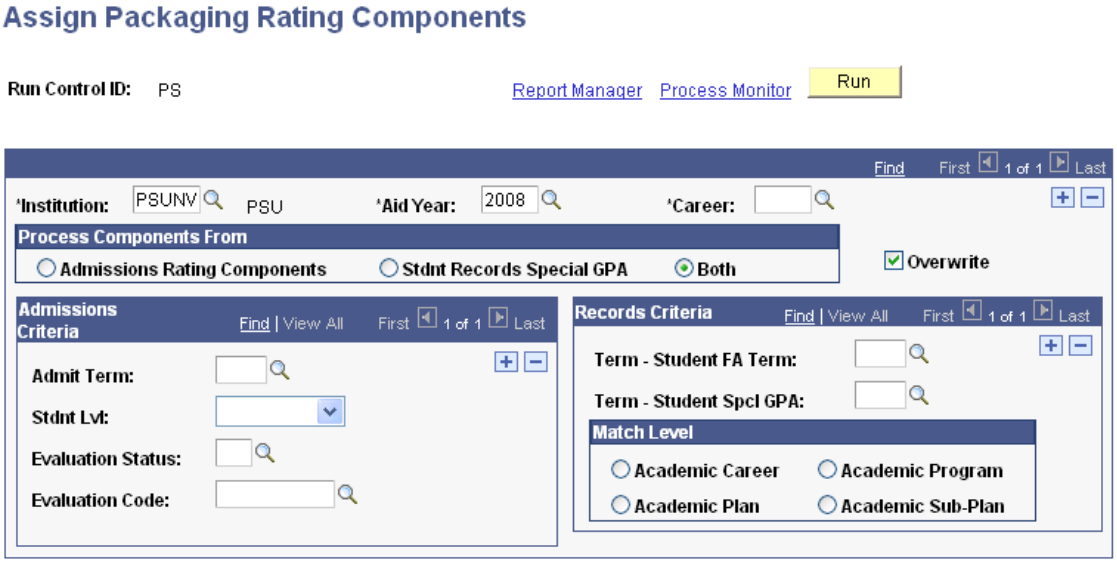
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Field or Control	Description
Var Num 1-10 (numeric variable)	Enter numeric variables to define anything that has a numeric value such as percentages, integers, or dollar amounts. You can use numeric variables to define formulated numeric values such as test scores plus GPA or a raw index of a student's financial need. If you do not enter a value in numeric variable field, the zeros remain in the field. The format for this field is numeric.
User Variable Y/N Flag #1-10	Yes/No Flags can be defined for any variable field with a Y or N value. An example of when you might use a Yes/No Flag is the Ability To Benefit test. Select the check box to indicate yes. Clear the check box to indicate no. The value that you enter should be true for the student whose name appears in the top portion of the page.

Populating Rating Components in Batch

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

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



Process Components From

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

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Field or Control	Description
Admissions Rating Components	Select this option to use admissions criteria for selecting students. Use this option if you want the process to select data from the admissions evaluation area. If you select this option, you cannot enter any criteria in the **Records Criteria** group box.
Stdnt Records Special GPA (student records special grade point average)	Select this option to enter Student Records criteria for selecting students. Use this option if you want the process to select data from the Student Special GPA page in Student Records. If you select this option, you cannot enter any criteria in the **Admissions Criteria** group box.
Both	Select this option to enter both admissions and student records criteria for selecting students. Use this option to have process select data from both admissions and special GPA data.

Other Page Elements

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

Admissions Criteria

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

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

Records Criteria

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

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

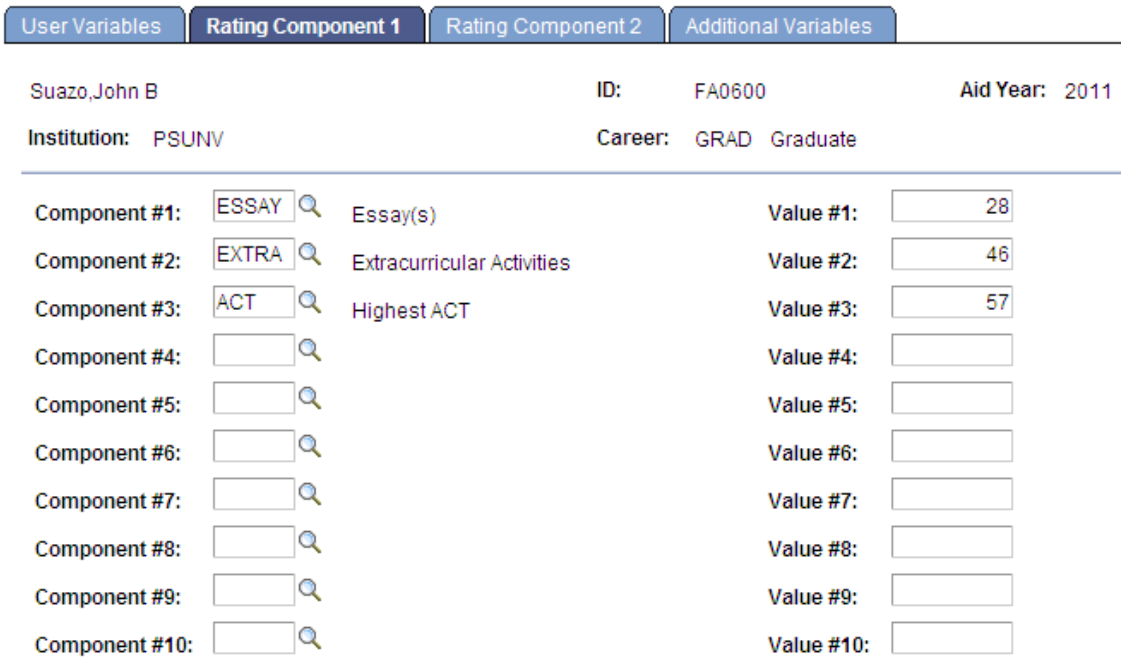
Related Topics

- Recruiting and Admissions: Setting up Applicant Evaluation
- Recruiting and Admissions: Setting Up Student Response

Populating Rating Components Manually

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

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



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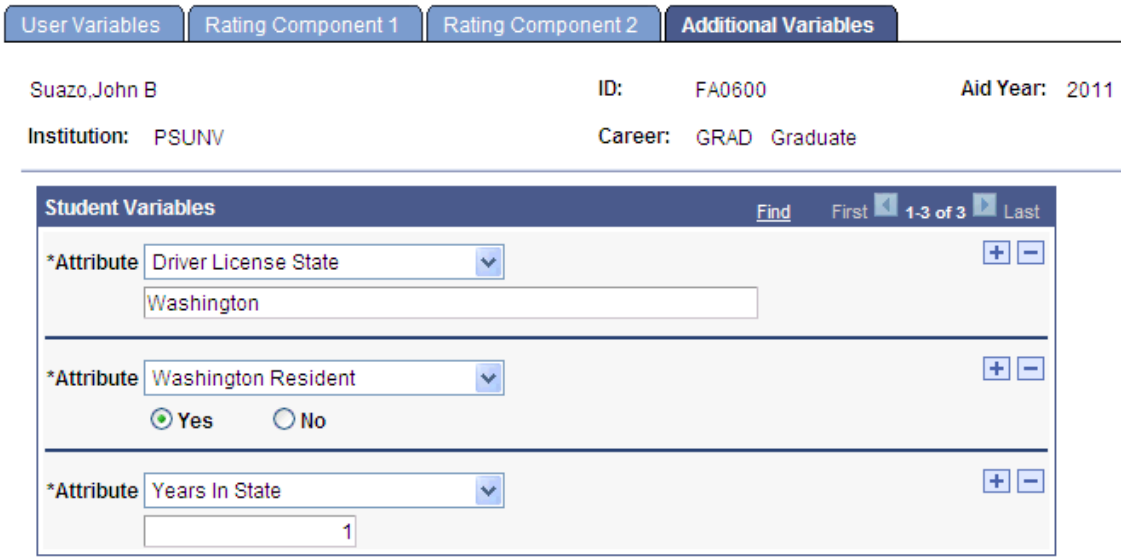
The package rating components are divided over two pages, Rating Component 1 page and Rating Component 2 page, with ten components per page. Package rating components are mapped to Recruiting and Admissions or Student Records criteria on the Package Rating Components page. If you are populating the package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

Field or Control	Description
Component # (component number	If you have run the Assign Packaging Rating Component (FAPKGCMP) process, the package rating components set up on the Package Rating Components 1 and 2 pages are populated in this field and the student's value for that component is displayed in the corresponding **Value** field. Whether or not you have run the above process, you can select an admissions rating component and enter the corresponding value manually.
Value # (value number)	A numeric field that represents the student's value for the corresponding package rating component. If you have run the Assign Packaging Rtng Component (FAPKGCMP) process, this field is automatically populated but you can change the value. If you are entering package rating components manually, enter the correct value.

Entering Additional Packaging Variables

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

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



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

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

See Campus Community Fundamentals: Associating a Common Attribute to a Record.

Defining Disbursement Plans and Split Codes

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

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

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

Understanding Disbursement Plans and Split Codes

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

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

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Pages Used to Define Disbursement Plans and Split Codes

Page Name	Definition Name	Navigation	Usage
Disbursement Plan	DISBURSE_PLAN_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Disbursement Plan Table**, and then **Disbursement Plan**	Create disbursement plans, by aid year, that you offer for each career at your institution. Disbursement plans are high level structural schemes possible within an academic career.
Copy Disbursement Plan Data	DISB_PLAN_COPY	Click the **Copy** button on the Disbursement Plan page.	Copy the information on the Disbursement Plan page from one combination of aid year, career, and academic institution to another.
Disbursement ID	DISBURSE_ID_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Disbursement ID Table**, and then **Disbursement ID**	Set up disbursement IDs and terms for each disbursement that should be associated with the disbursement plan. Disbursement IDs identify all the possible target disbursement dates within a specific period.
Copy Disbursement ID Data	DISB_ID_COPY	Click the **Copy** button on the Disbursement ID page.	Copy the information on the Disbursement ID page from one combination of academic institution, aid year, academic career, and disbursement plan to another.
Disbursement Split Code	DISB_SPLIT_CD	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Disbursement Split Codes**, and then **Disbursement Split Code**	Set up disbursement split codes, or various disbursement patterns for this disbursement plan. Disbursement split codes are created to provide a label to the various patterns of disbursement IDs. For example, equal disbursement across terms, or fall only disbursement.

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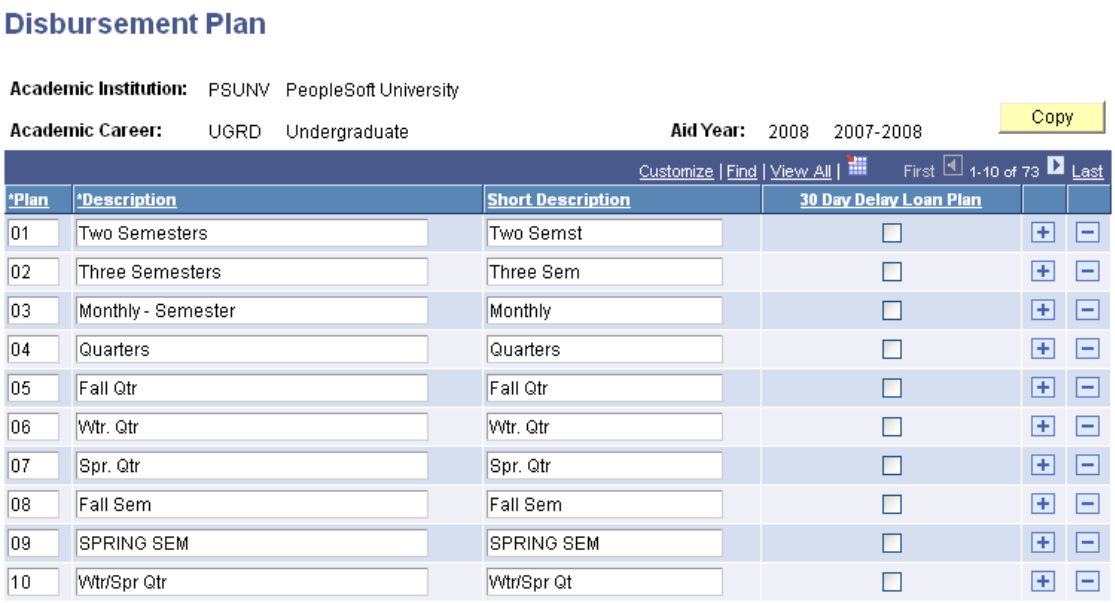
Page Name	Definition Name	Navigation	Usage
Copy Split Code Data	SPLIT_CODE_COPY	Click the **Copy** button on the Disbursement Split Code page.	Copy the information on the Disbursement Split Code page from one combination of academic institution, aid year, and academic career to another.
Disbursement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

Creating Disbursement Plans

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

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

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Disbursement Plan

Academic Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Aid Year: 2008 2007-2008

Copy

Customize | Find | View All | First 1-10 of 73 Last

*Plan	*Description	Short Description	30 Day Delay Loan Plan
01	Two Semesters	Two Semst	
02	Three Semesters	Three Sem	
03	Monthly - Semester	Monthly	
04	Quarters	Quarters	
05	Fall Qtr	Fall Qtr	
06	Wtr. Qtr	Wtr. Qtr	
07	Spr. Qtr	Spr. Qtr	
08	Fall Sem	Fall Sem	
09	SPRING SEM	SPRING SEM	
10	Wtr/Spr Qtr	Wtr/Spr Qt	

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

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Note

Special consideration is required for loan item types that are processed using the Campus Solution Loan Processing module. When a loan is originated, the scheduled disbursement amounts and associated disbursement ID are carried forward to the Campus Solutions Financial Aid Loan Origination process.

All Direct Lending loan item types can support the concept of a disbursement plan and split code scheme that supports multiple disbursement IDs within a term. COD currently supports up to 20 total disbursements per loan application for both Stafford and PLUS loans. Some examples:

1. A disbursement plan of two semesters (fall and spring) can be setup to convey a total of 10 disbursement IDs, each term assigned with 5 disbursement IDs. However, the first term defined within the disbursement plan and split code is not allowed to have a zero percentage defined for the first term.

2. A disbursement plan of three quarters (fall, winter and spring cannot be used to award a winter and spring DL PLUS loan.

3. To facilitate increases and change processing for a Stafford or PLUS one term direct loan MPN item types, you should set up and define at least four disbursement IDs for the term.

All non-Direct Lending programs must have disbursement plan and split code schemes that do not include any zero percentages or zero amounts in any disbursement ID. This includes any alternative loans processed using the CommonLine file format and process. All non-DL loans with a zero amount associated with a disbursement ID are rejected during the initial origination process. For example, a disbursement plan of three quarters (fall, winter, and spring) cannot be used to award a winter and spring TERI loan.

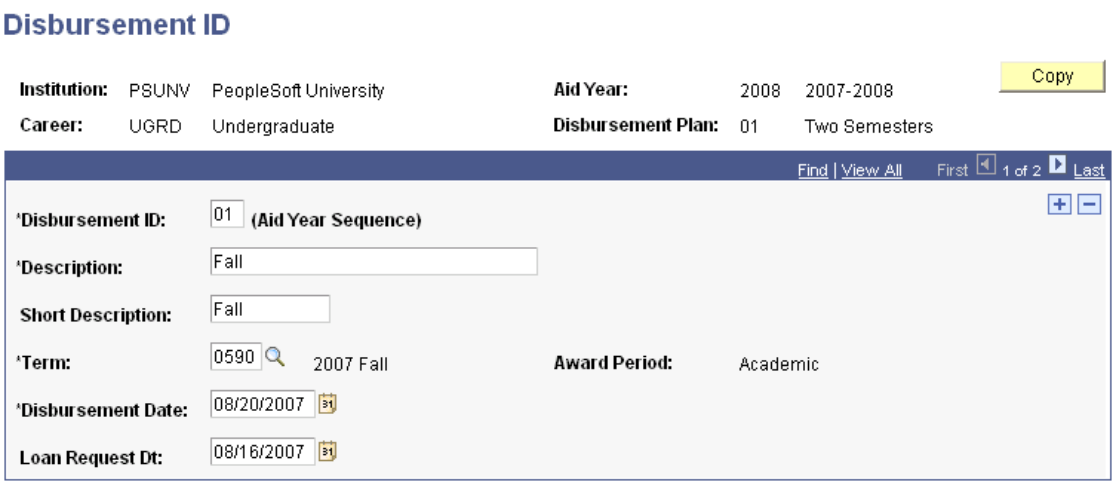
Field or Control	Description
Plan	Enter a two-character code (alphanumeric) for the disbursement plan. You should use sequential numeric codes (such as 01, 02, 03) rather than skipping numbers (02, 01, 03).
Description	Enter descriptions that easily distinguish one plan from another for easy identification.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

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Setting Up Disbursement IDs

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

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



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

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Field or Control	Description
Disbursement ID	Enter a two-digit number for each term's disbursement that occurs in the disbursement plan identified at the top of the page. The number indicates the aid year sequence for the disbursements for this plan. For example, you may assign your fall term an *01* disbursement ID, winter term an *02*, and spring term an *03*. The aid year sequence for this disbursement plan would be 01, then 02, and then 03. Disbursements process in sequential order within a disbursement plan. Ensure that if the term includes a nonstandard term, such as a summer term, the nonstandard term is placed in the correct sequence. For example, if the disbursement plan includes a disbursement during the summer term and your institution has a leading summer term, the disbursement IDs for the summer term must come before those for terms in the academic award period. If your disbursement plan has the **30-Day Delay** check box selected, define a disbursement ID to accommodate this condition with the appropriate disbursement date.
Term	Select the academic term to which this disbursement ID applies. The system populates the **Award Period, Disbursement Date,** and **Loan Request Dt** (loan request date) fields based on the selected term when you move out of this field. Verify that the term is associated with an award period compatible with the award periods spanned by the disbursement plan.
Award Period	Displays the award period associated with the selected term. Verify that the term corresponds to the correct award period. To correct the award period, use the Valid Terms for Career page to change the term's award period.

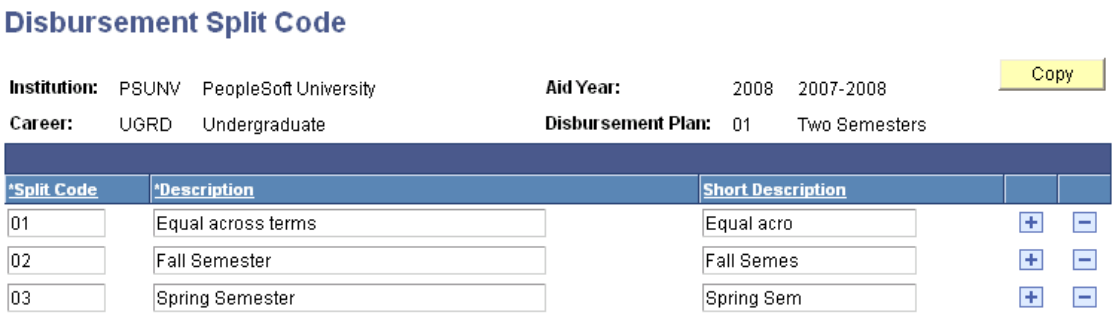
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Field or Control	Description
Disbursement Date	This is the date on which financial aid should be applied to the student's account. After the term value is entered, the system defaults a disbursement date of 10 days prior to the term begin date, which is defined in Student Records on the Term/Session Table component. You can override this date. If you plan to disburse more than once a term, the disbursement date for each disbursement ID needs to correspond to when you want the disbursements to initially occur. For example, for a monthly disbursement during the fall term, the first disbursement ID could use the defaulted date, for example August 15. The next disbursement ID would have a disbursement date of September 15, the third disbursement ID would have a disbursement date of October 15, and so on. **Note:** Current federal guidelines state that federal financial aid cannot be disbursed to a student more than 10 days prior to the first day of the term, and that federal financial aid should be disbursed separately for each term.
Loan Request Dt (loan request date)	Enter the date you are requesting loan funds to be sent from the lender to your institution. The default loan request date is 13 days prior to the term start date, which is the current federally defined legal maximum. **Note:** The loan request date is carried forward to the Loan Origination pages where the date can be modified. Care should be taken to ensure that loan request dates remain in sync.

Setting Up Disbursement Split Codes

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

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



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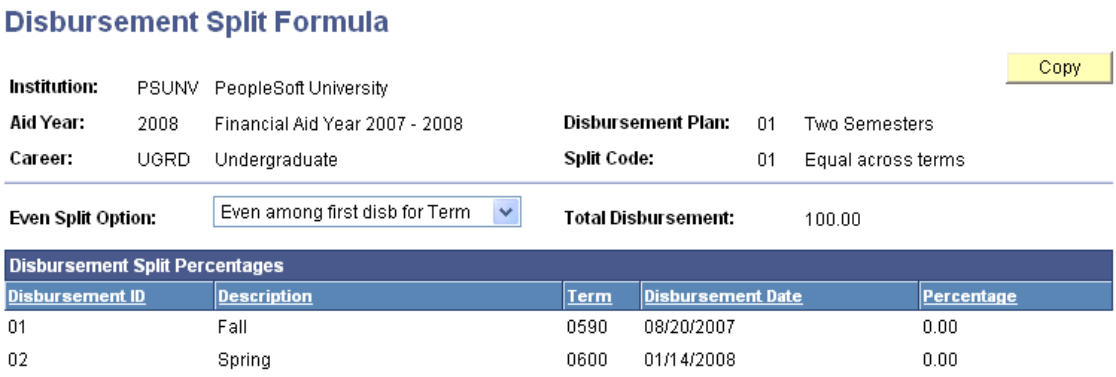
Disbursement split codes put a label to various disbursement schemes that instruct the system how to divide an award disbursement amount among terms. For example, if your institution has three terms, you would want one split code to split disbursements equally among the three terms. You usually have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

Field or Control	Description
Split Code	Enter a two-character code for the split code you are defining for this disbursement plan. You can define the split code with numbers or characters.
Description	Enter a description that distinguishes one plan from another for easy identification. For example, a split code of Two Semesters could indicate disbursements should be split in two—one for fall term and one for spring term.

Defining Split Code Formulas

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

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



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

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Field or Control	Description
Even Split Option	Select a value in this field to split the award amount equally among all terms or equally among all disbursements in a term, instead of manually splitting the award using percentages. This field affects how disbursement-protected awards are distributed when they are modified. If you select an **Even Split Option**, you cannot enter any values in the percentage fields. See Protecting Disbursements During Awarding. In the following discussion, *term target amount* refers to the total disbursement amount within the term. • *(none):* Do not select an even split option if you want to define percentages for each disbursement instead of evenly distributing the disbursements. You must enter the percentage of the total award each disbursement ID should receive in the **Percentage** field. The total of all percentages entered must equal 100.00. • *Even across disbs by Term* (even across disbursements by term): Select this option to evenly distribute an award across terms. The award is distributed evenly across the number of terms and evenly across the number of disbursements within each term. For example, the student's award is 3,000.00 USD for three terms and there are two Disbursement IDs per term. The term target amount is 1,000.00 USD for each term and 500.00 USD for each disbursement ID in the term. **Note:** This option can be used when you want to spread Pell Grant across multiple Disbursement IDs per term. • *Even across disbs for One Term* (even across disbursements for one term): Select this option to evenly distribute an award among all Disbursement IDs in a single term. • *Even among first disb by Term* (even among first disbursement by term): Select this option to evenly distribute an award among only the first disbursements of each term within a disbursement plan regardless of the number of disbursements in the term. For example, the student's award is 3,000.00 USD for three terms and there are two disbursement IDs per term. The term target amount is 1,000.00 USD for each term and the first disbursement ID of that term only. **Note:** This option is used by Direct Lending loan item types. This option supports multiple Disbursement IDs per term to allow for loan increases and award

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Field or Control	Description
	changes for DL Stafford and DL PLUS MPN processing. • *PELL: User-defined Splits*: Select this option to manually define percentages for each disbursement using the following parameters: 1. The sum of all percentages entered must total 100.00 percent. 2. The sum of the percentages for each term must equal. If there are an odd number of terms (e.g., 3 terms for a quarter-based school), a 0.01 percent tolerance is permitted on percentages carried to the hundredths place (e.g., 33.33%/33.33%/33.34%). 3. You are able to specify 0.00 percent for a given Disb ID as long as the term percentages are equal. 4. Because the percentages across terms must be equal, the system compares each term's percent to the other terms. You can, however, exclude terms from this comparison by selecting the **Exclude Term** check box. If you do this, the selected term is not considered when determining if all the terms' percentages are equal. Select the **Exclude Term** check box to prevent a 0.00 percent term from being counted during the "equal percents" comparison. When using the *PELL: User-defined Splits* option for Pell Grant awarding, the system first determines the term percentage and uses that as the *denominator* and uses the user-defined Disb ID percent as the *numerator* to determine the disbursement amount. Then the term award amount is multiplied by this fraction to determine the award amount that for that particular Disb ID. For example, a two-term, semester-based school results in a percentage of 50 percent for each term. Assuming an annual award is 1,000.00 USD, then the term award amount is 500.00 USD per term. If the institution sets up four Disb IDs per term as follows: FALL Disb ID 01 = 15% FALL Disb ID 02 = 0% FALL Disb ID 03 = 35% FALL Disb ID 04 = 0% SPRING Disb ID 05 = 15% SPRING Disb ID 06 = 0% SPRING Disb ID 07 = 35% SPRING Disb ID 08 = 0%

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Field or Control	Description
	Then, the system makes the following calculations: FALL Disb ID 01 = (15/50) * 500.00 = 150.00 FALL Disb ID 02 = (0/50) * 500.00 = 0.00 FALL Disb ID 03 = (35/50) * 500.00 = 350.00 FALL Disb ID 04 = (0/50) * 500.00 = 0.00 SPRING Disb ID 05 = (15/50) * 500.00 = 150.00 SPRING Disb ID 06 = (0/50) * 500.00 = 0.00 SPRING Disb ID 07 = (35/50) * 500.00 = 350.00 SPRING Disb ID 08 = (0/50) * 500.00 = 0.00 **Note:** Only 0.00 percent terms can be excluded. You cannot exclude non-zero percent entries. **Note:** This option can only be used with Pell Financial Aid Item types. **Note:** When using this option, the Pell award is not returned as a custom split so that during any subsequent award validation, these percentages continue to be honored.
Total Disbursement	The sum of the percentages that you have entered. Your percentages must add up to 100 percent for the entire year.
Percentage	This field is not available if you select an even split option. Select the percentage of the total award you want to disburse for the given disbursement ID. Your percentages should match the description of your split codes. For example, for a two-semester disbursement plan, if your split code is set up for a 40/60 split between terms, the percentages for each semester would be 40 percent for the fall disbursement ID and 60 percent for the spring disbursement ID.
Midpoint	Select to identify the midpoint date. This field is available when the **Even Split Option** is *Even across disbs for One Term* and communicates which Disb ID reflects the midpoint of the term.
Exclude Term	Select the Exclude Term check box to prevent a 0.00 percent term from being counted during the matching process. **Note:** This field is available when selecting the **Even Split Option** *PELL: User-defined Splits*.

Comparison of Even Split Option Values

Here's a comparison of four Even Split Options using an annual 1000.00 USD award amount over two terms (500.00 USD per term) and eight Disbursement IDs (all amounts in USD). The

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PELL: User-defined Split option is based on the example in the Even Split Option field description:

Even Split Option	Fall Term 01	Fall Term 02	Fall Term 03	Fall Term 04	Spring Term 05	Spring Term 06	Spring Term 07	Spring Term 08
Even across Disbs by Term	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00
Even Among First Disb by Term	500.00	0.00	0.00	0.00	500.00	0.00	0.00	0.00
Even across Disb for One Term	125.00	125.00	125.00	125.00	0.00	0.00	0.00	0.00
PELL: User-defined Split	150.00	0.00	350.00	0.00	150.00	0.00	350.00	0.00

Setting Up Aggregate Aid

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

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

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

Understanding Aggregate Aid

To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete aid history when determining aid eligibility.

Campus Solutions provides several setup options and methods to maintain aggregate or history aid to ensure that eligibility requirements and award limits are followed.

The National Student Loan Data System (NSLDS) provides an integrated, historical view of all of a student's Title IV loans and grants during all stages of the awards' life cycles – from aid approval through disbursement, any overpayments, repayment, delinquency, and closure. To use NSLDS data in the Awarding and Packaging processes, NSLDS must be loaded, pushed

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to aggregate aid tables, and the Packaging process must be directed to use NSLDS as an aggregate source to assess how much aid had been used towards lifetime limits.

Beginning with aid year 2026, aggregate aid processing supports two regulatory frameworks:

- Legacy (Pre-OB3): applies to grandfathered students
- One Big Beautiful Bill (OB3): applies to new students under updated federal rules

Institutions must configure aggregate aid to support both frameworks simultaneously.

Here are key concepts:

Concept	Description
Aggregate Levels	Aggregate levels represent student progression (for example, U1, U2, G1, P1) and are used to determine applicable loan limits.
Aggregate Limits	Aggregate limits include: • Annual limits: maximum per aid year • Lifetime limits: maximum across all years

OB3 introduces:

- Separation of Graduate vs Professional aggregates
- New Parent PLUS aggregate limit fields
- Dual tracking of legacy vs OB3 limits
- New fields and logic controlling packaging behavior

Related Topics

- Using NSLDS Data and Processes
  This section provides an overview of NSLDS data and processes and discusses how to:
- Managing Aggregate Aid
  To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete history when determining aid eligibility. Financial Aid provides several options and methods to maintain aggregate aid to ensure that Packaging adheres to eligibility requirements and award limits.

Pages Used to Set Up Aggregate Aid

Page Name	Definition Name	Navigation	Usage
Aggregate Level Cross-Reference	AGGR_LVL_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Level Translation**, and then **Aggregate Level Cross-Reference**	Review aggregate levels and link the NSLDS Loan Year definitions from the U.S. Department of Education with your institution's specific aggregate level values and descriptions for aggregate levels.

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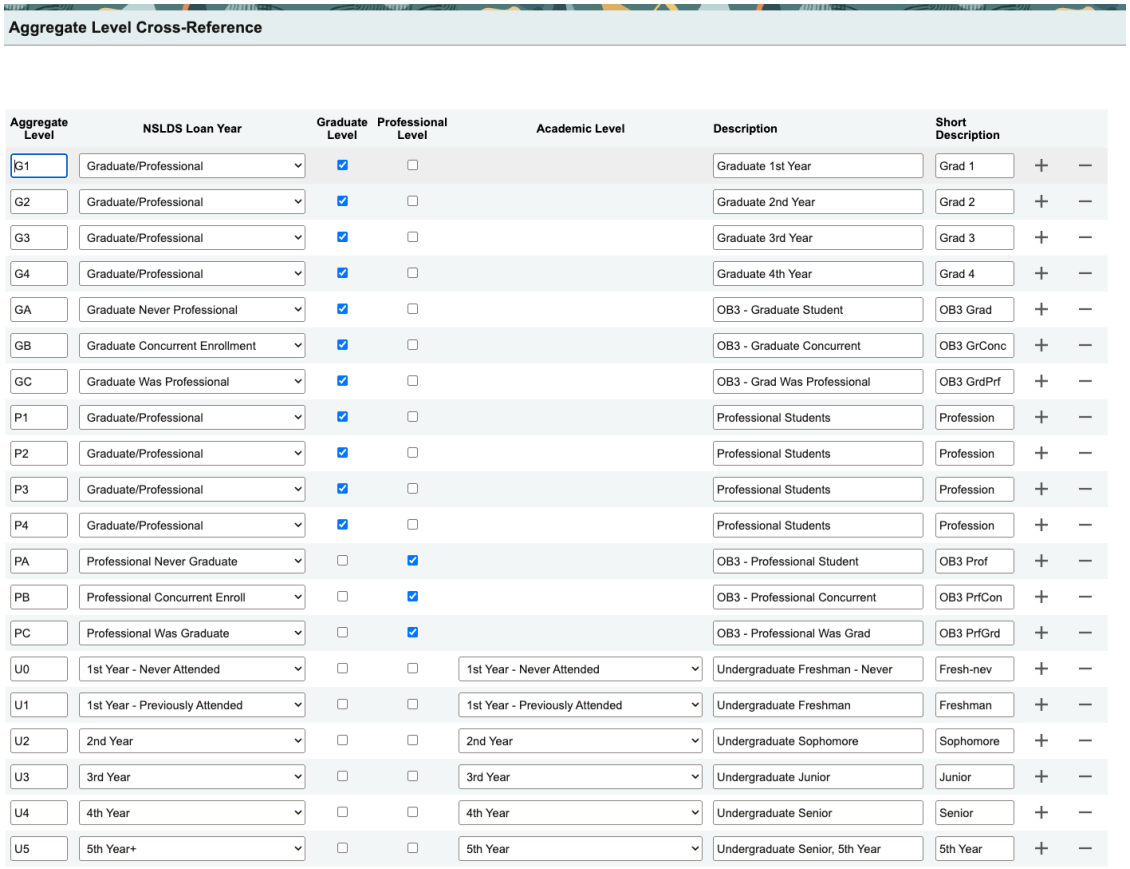
Page Name	Definition Name	Navigation	Usage
Aggregate Program	AGGR_PROG_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Programs**, and then **Aggregate Program**	Establish aggregate aid program limits for Stafford programs for both FFELP and Direct Lending.
Aggregate Aid Limit	AGGR_AID_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Aid Limits**, and then **Aggregate Aid Limit**	Create aggregate aid limits for annual and aggregate aid limits to meet your business processing rules. The Aggregate Aid Limits page defines annual and lifetime borrowing limits used by the packaging process.
Copy Aggregate Aid Limits	AGGR_AID_COPY	Click the **Copy** button on the Aggregate Aid Limit page.	Copy aggregate aid limit setup from one aggregate area/aid year/effective date combination to another.
Aggregate Area-NSLDS Cross reference	SFA_AGGR_AREA_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Area Translation**, and then **Aggregate Area-NSLDS Cross reference**	Create translations for each of your aggregate areas to one of the NSLDS aggregate categories.
Aggregate Areas for Institution	SFA_NSLDS_AGG_INST	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Area for Institution**, and then **Aggregate Areas for Institution**	Identify aggregate areas to be evaluated for an institution during the NSLDS push data process.

Reviewing Aggregate Levels

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

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

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Aggregate Level Cross-Reference

Aggregate Level	NSLDS Loan Year	Graduate Level	Professional Level	Academic Level	Description	Short Description
G1	Graduate/Professional	☑	☐		Graduate 1st Year	Grad 1
G2	Graduate/Professional	☑	☐		Graduate 2nd Year	Grad 2
G3	Graduate/Professional	☑	☐		Graduate 3rd Year	Grad 3
G4	Graduate/Professional	☑	☐		Graduate 4th Year	Grad 4
GA	Graduate Never Professional	☑	☐		OB3 - Graduate Student	OB3 Grad
GB	Graduate Concurrent Enrollment	☑	☐		OB3 - Graduate Concurrent	OB3 GrConc
GC	Graduate Was Professional	☑	☐		OB3 - Grad Was Professional	OB3 GrdPrf
P1	Graduate/Professional	☑	☐		Professional Students	Profession
P2	Graduate/Professional	☑	☐		Professional Students	Profession
P3	Graduate/Professional	☑	☐		Professional Students	Profession
P4	Graduate/Professional	☑	☐		Professional Students	Profession
PA	Professional Never Graduate	☐	☑		OB3 - Professional Student	OB3 Prof
PB	Professional Concurrent Enroll	☐	☑		OB3 - Professional Concurrent	OB3 PrfCon
PC	Professional Was Graduate	☐	☑		OB3 - Professional Was Grad	OB3 PrfGrd
U0	1st Year - Never Attended	☐	☐	1st Year - Never Attended	Undergraduate Freshman - Never	Fresh-nev
U1	1st Year - Previously Attended	☐	☐	1st Year - Previously Attended	Undergraduate Freshman	Freshman
U2	2nd Year	☐	☐	2nd Year	Undergraduate Sophomore	Sophomore
U3	3rd Year	☐	☐	3rd Year	Undergraduate Junior	Junior
U4	4th Year	☐	☐	4th Year	Undergraduate Senior	Senior
U5	5th Year+	☐	☐	5th Year	Undergraduate Senior, 5th Year	5th Year

The system populates this table.

Field or Control	Description
Aggregate Level	A two-digit alphanumeric code that you assign to describe a student's year in school. Use the **Description** and **Short Description** fields to provide a full description of the student's year in school or aggregate level. To support cumulative aggregate processing all aggregate levels must conform to a sequential structure to apply award history balances against aggregate cumulative limits. If your institution deems it necessary to introduce a new Aggregate Level than what is provided, then you must follow the same hierarchical structure that each level's two-character aggregate level collate in ascending sequence.
NSLDS Loan Year	Select the U.S. Department of Education NSLDS loan year value that you want to associate with each aggregate level appearing on the page. NSLDS loan year values are delivered with your system as translate values. These translate values should not be changed or modified in any way.

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Field or Control	Description
Graduate Level	Select if the associated aggregate level/NSLDS loan year combination is a graduate or postgraduate level. This identifies a student with the associated aggregate level as either a graduate/professional or undergraduate for the purpose of determining federal eligibility.
Professional Level	Select if the associated aggregate level/NSLDS loan year is a postgraduate level. This identifies a student with the associated aggregate level as a professional student. Note that if neither this field nor the Graduate Level field is set, the student is associated with the undergraduate level for the purpose of determine federal eligibility.

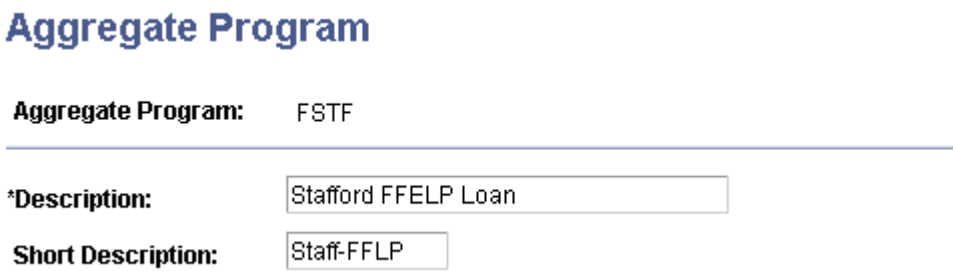
Important rules:

- You can't select both Graduate and Professional Level fields for the same aggregate level.
- Both Graduate and Professional Level fields can be left blank.
- Aggregate Level Cross-Reference setup is not aid-year specific, so configuration impacts all processing years.

Establishing Aggregate Programs

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

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



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

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

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

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

Creating Aggregate Aid Limits

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

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

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

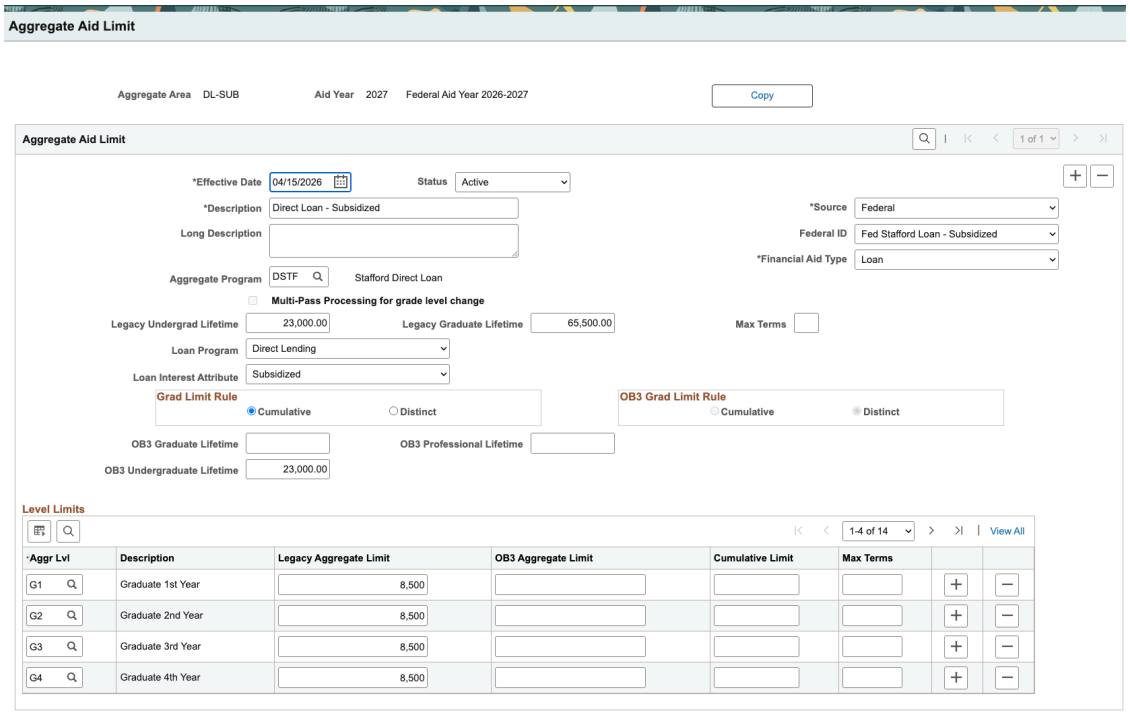
Beginning with aid year 2026, the Aggregate Aid Limit page contains two sets of fields:

- Legacy field are fields that apply when a student is identified as legacy, meaning they are grandfathered under the loan limit exception rule.
- OB3 fields are fields that apply to students subject to the One Big Beautiful Bill (OB3) regulations.

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

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



Note

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

For aid years after 2024-2025, updated labels and new fields related to OB3 requirements will appear.

Warning

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

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Field or Control	Description
Source	Select the funding source. You can select *Federal, Institutnl* (institutional), *Other, Private,* or *State.* The value that you enter here must match the source of the financial aid item type. If it does not, you cannot associated this aggregate area with the financial aid item type, because the aggregate area does not appear as an option in the **Aggregate Area** field on the FA Item Type 1 page.
Federal ID	This field is available only if you select *Federal* as the source. Select the value that identifies the type of federal aid the aggregate area tracks. Values are: *GAANN* (Graduate Assistance in Areas of National Need), *Grad PLUS, HEAL, HPSL, LDS, Javits* (Jacob K. Javits Fellowship), *NIH* (National Institute of Health), *NSF* (National Science Foundation),*Nursing Ln* (nursing loan), *Other* (Other Federal Fund), *PCL, PELL Grant, PLUS, Perkins Ln* (Perkins Loan), *SEOG, Subsidized, TEACH, Unsubsidized,* or *Work Study.* **Note:** You must define the federal ID for all federal aggregate areas currently used in your system. Also, be sure that your federal financial aid item types have the same federal ID as the aggregate area with which they are associated. For example, your Pell Grant financial aid item types and your Pell Grant aggregate area should both have a federal ID of *Pell Grant.* You must select the correct federal ID to have the federal aggregate area use the correct limits.
Financial Aid Type	Select the value that identifies the type of financial aid this aggregate area tracks.
Aggregate Program	If this aggregate area belongs to the federal Stafford program select the appropriate aggregate program. Aggregate program limits link aggregate areas together to enable you to combine limits between subsidized and unsubsidized Stafford loan aggregate area limits.
Multi-Pass Processing for grade level change	Select this check box to have the Awarding and Packaging processes automatically determine increased aid eligibility if multiple grade levels are present for the student.
Pell Grant	Select to activate Pell-only processing rules if you are defining a Pell Grant aggregate area. This check box is available only if you select *Grant* as the financial aid type.

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Field or Control	Description
Undergrad Lifetime (undergraduate lifetime)	Enter the maximum amount of this type of aggregate aid that students can receive during their undergraduate career. This is optional for many aggregates but should be defined and used in accordance with the requirements for a particular source of funding. This field is mandatory for the following federal aggregate areas: Perkins, subsidized Stafford, and unsubsidized Stafford. For aid year 2026 onward, this field has been relabeled **Legacy Undergrad Lifetime**.
Graduate Lifetime	Enter the maximum amount of this type of aggregate aid that students can receive during their graduate career. This is optional for many aggregate areas but should be defined and used in accordance with the requirements for a particular source of funding. This field is mandatory for the following federal aggregate areas: Perkins, subsidized Stafford, and unsubsidized Stafford. The **Grad Limit Rule** determines whether undergraduate aid counts toward this graduate lifetime amount. Failure to establish undergraduate and graduate lifetime limits for Perkins, subsidized Stafford, and unsubsidized Stafford aggregate areas can result in the Packaging process awarding more than the lifetime maximum amounts the student is eligible to receive. For aid year 2026 onward, this field has been relabeled **Legacy Graduate Lifetime**.
Max Terms (maximum terms)	Enter the maximum number of terms that students can receive this type of aggregate aid during their lifetime, regardless of career. This is optional for most aggregate areas but should be defined and used in accordance with the requirements of a particular source of funding. This field is currently not used in processing.
Loan Program	Select the type of loan program tracked by the aggregate area. This field is available only if you select *Loan* as the financial aid type.
Loan Interest Attribute	Indicates whether the government pays the interest on the loan. This field is available only if you select *Loan* as the financial aid type. *Subsidized:* The government pays the interest on the loan while the student is in school, during the six-month grace period, and during any deferment periods. *Unsub* (unsubsidized): The government does not pay the interest on the loan.

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Field or Control	Description
First Pell Percentage	This field appears when the **Aggregate Area** has been activated as a Pell Grant. Enter *100.00* to ensure students are fully awarded a first Pell Grant (Pell1). If you enter any value less than 100.00, students are not fully awarded a Pell1. To calculate a student's remaining eligibility percentage for a Pell1, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Aggregate Aid plus the Total Percent Used from prior Pell1 awards in the system) from this field.
Second Pell Percentage	This field appears when the **Aggregate Area** has been activated as a Pell Grant. Enter 150.00 to ensure that students are fully awarded a Pell2. If you enter any value less than 150.00, students are not fully awarded a Pell2. To calculate a student's remaining eligibility percentage for a Pell2, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Aggregate Aid plus the Total Percent Used from prior Pell1 and Pell2 awards in the system) from this field.
Lifetime Eligibility Maximum	This field appears when the **Aggregate Area** has been activated as a Pell Grant and **Aid Year** is 2013 and beyond. Enter the maximum percentage for a student's Lifetime Pell Eligibility. For example, when the United States Department of Education says that a student cannot exceed 12 full-time semester terms (translated as 600 percent), then you would enter 0600.0000 in this field. An individual student's Lifetime Eligibility Used percentage plus current year system-generated Pell Grant award cannot exceed this maximum percentage.
Minimum Pell Scheduled Award	Enter the minimum scheduled Pell Grant award for the Aid Year. **Note:** Applicable for the 2024-2025 and future aid years only.
Maximum Pell Scheduled Award	Enter the maximum scheduled Pell Grant award for the Aid Year. **Note:** Applicable for the 2024-2025 and future aid years only.

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Field or Control	Description
Grad Limit Rule (graduate limit rule)	Identifies whether the graduate lifetime amount should be calculated as distinct from or cumulative with the undergraduate amount. Note that this field applies to the pre-OB3 loan aggregates. *Cumulative:* The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. For example, you use a cumulative graduate limit rule when a student is eligible for up to 40,000.00 USD in Perkins loans for both undergraduate and graduate careers, only 20,000.00 USD of which can be awarded during the undergraduate career. If students received the full 20,000.00 USD during their undergraduate enrollment, they may not receive more than 20,000.00 USD in their graduate enrollment—totaling 40,000.00 USD between their undergraduate and graduate enrollments. No student receives more than 40,000.00 USD during undergraduate and graduate enrollments. Total graduate amounts on the various aggregate summary pages reflect undergraduate accumulations if the aggregate area is defined as cumulative. *Distinct:* The undergraduate and graduate limits are tracked separately. For example, you use a distinct graduate limit rule when a student is eligible for up to 20,000.00 USD as an undergraduate and up to 40,000.00 USD as a graduate, for a total of 60,000.00 USD.
Indep Undergrad Lifetime (independent undergraduate lifetime)	This field appears when **Source** is *Federal*, **Financial Aid Type** is *Loan*, and Loan Interest Attribute is Unsub. Enter the maximum amount that supports the Independent Undergraduate Lifetime limit for Unsubsidized loans. For aid year 2026 onward, this field has been relabeled **Legacy Indep Undergrad Lifetime**.
Dependent Undergraduate	This field appears when **Source** is *Federal*, **Financial Aid Type** is *Loan*, and Loan Interest Attribute is Unsub. Enter the maximum amount that supports the Dependent Undergraduate Lifetime limit for Unsubsidized loans. For aid year 2026 onward, this field has been relabeled **Legacy Dependent Undergrad**.
OB3 Grad Limit Rule	Identifies whether the graduate lifetime amount awarded under the One Big Beautiful Bill (OB3) requirements should be calculated as distinct from or cumulative with the undergraduate amount. Under OB3 guidelines this field defaults to Distinct.

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Field or Control	Description
OB3 Graduate Lifetime	Enter the maximum amount of this type of aggregate aid that students can receive during their graduate career under the OB3 requirements. This field is mandatory for the federal aggregate areas tied to direct loans (Sub, Unsub and Parent PLUS). Failure to establish OB3 undergraduate, graduate, and professional lifetime limits for subsidized Stafford, unsubsidized Stafford and Parent PLUS aggregate areas can result in the packaging process awarding more than the lifetime maximum amounts the student is eligible to receive.
OB3 Professional Lifetime	Enter the maximum amount of this type of aggregate aid that students can receive during their professional degree career under the OB3 requirements. This field is mandatory for the federal aggregate areas tied to direct loans (Sub, Unsub and Parent PLUS). Failure to establish OB3 undergraduate, graduate, and professional lifetime limits for subsidized Stafford, unsubsidized Stafford and Parent PLUS aggregate areas can result in the packaging process awarding more than the lifetime maximum amounts the student is eligible to receive.
OB3 Undergraduate Lifetime	Enter the maximum amount of this type of aggregate aid that students can receive during their undergraduate career under the OB3 requirements. This field is mandatory for the federal aggregate areas tied to direct loans (Sub, Unsub and Parent PLUS).

Level Limits

Field or Control	Description
Aggr Lvl (aggregate level)	List each aggregate level that has an annual aggregate limit. Aggregate levels and their accompanying definitions come from the Aggregate Level Cross-Reference page.
Aggregate Limit	Enter the maximum amount of aggregate aid that can be awarded while the student is at the associated academic level within a particular aid year. This aggregate limit can set the award amount returned by the Packaging process. This field is optional for most aggregate areas. This field is mandatory for the following federal aggregate areas: Pell, SEOG, Perkins, subsidized Stafford, and unsubsidized Stafford. For aid year 2026 onward, this field has been relabeled **Legacy Aggregate Limit**.

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Field or Control	Description
OB3 Aggregate Limit	Enter the maximum amount of aggregate aid that can be awarded under OB3 requirements while the student is at the associated academic level within a particular aid year. This aggregate limit can set the award amount returned by the Packaging process. This field is optional for most aggregate areas. This field is mandatory for the following federal aggregate areas: subsidized Stafford, unsubsidized Stafford.
OB3 Ind UG Annual Limit (OB3 Independent Undergraduate Annual Limit)	This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Independent Undergraduate Annual Aggregate Level limit for Unsubsidized loans under OB3 requirements.
OB3 Dep UG Annual Limit (OB3 Dependent Undergraduate Annual Limit)	This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Dependent Undergraduate Annual Aggregate Level limit for Unsubsidized loans under OB3 Requirements.
Cumulative Limit	Enter the maximum amount of aggregate aid that can be awarded while the student is at the associated aggregate level. Entering a value here activates cumulative aggregate level checking and allows aggregate level limits across aid years. For example, the federal Perkins loan program sets a limit of 8,000.00 USD for any student who has not completed two academic years of undergraduate work. In the example of the federal Perkins loan, aggregate levels U0, U1, U2 all would have a cumulative limit set to 8,000.00 USD and annual aggregate limits set to 4,000.00 USD.
Independent Annual Limit	This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Independent Undergraduate Annual Aggregate Level limit for Unsubsidized loans. For aid year 2026 onward, this field has been relabeled **Legacy Indep Annual Limit**.
Dependent Annual Limit	This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Dependent Undergraduate Annual Aggregate Level limit for Unsubsidized loans For aid year 2026 onward, this field has been relabeled **Legacy Dep Annual Limit**.

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Using Aggregate Areas with Multiple Pass Processing

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

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

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

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

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

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

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disbursements into a single composite award reflecting the sum total of the individual aggregate level increases for the aid year.

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

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

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

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

Item Type = 900000000810, Mackor Scholarship Grant

Disbursement Plan = 04

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area FIRE - Level Limits setup

U1 = 2,000

U2 = 4,000

U3 = 5,000

First internal pass based on U1 eligibility:

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

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

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

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

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

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

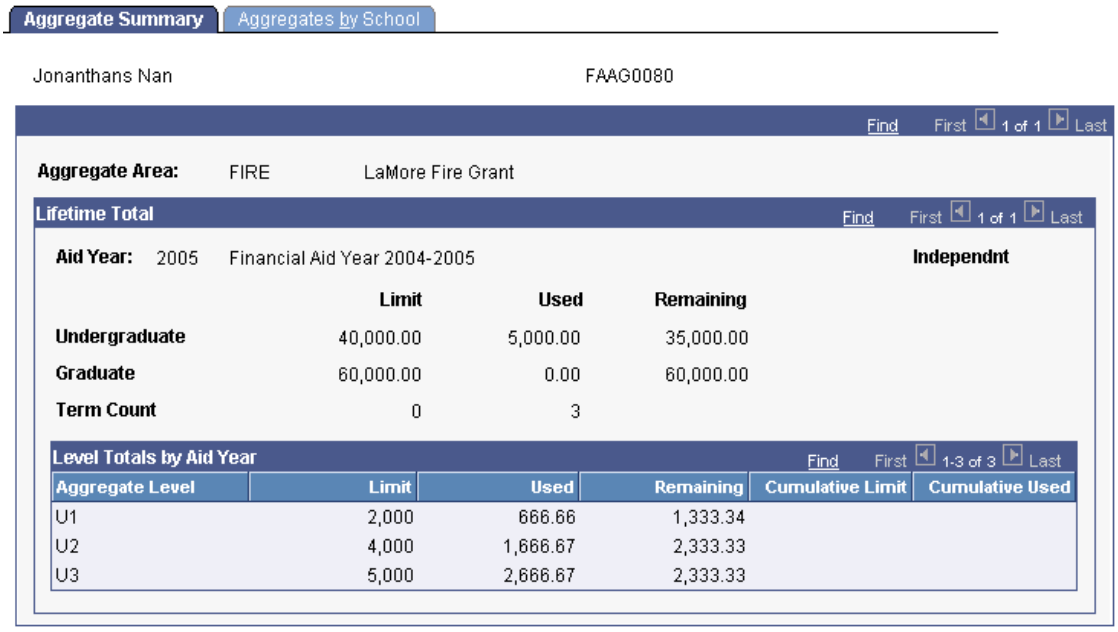
Final posted award: Item Type = 900000000810 5,000 USD (note overall award did not exceed the highest level limit. In this example 5,000 USD):

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

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

This example illustrates the Aggregate Summary page with MPP selected.

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

Item Type = 900000000810, Mackor Scholarship Grant

Disbursement Plan = 04

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area FIRE - Level Limits

U1 = 2,000

U2 = 4,000

U3 = 5,000

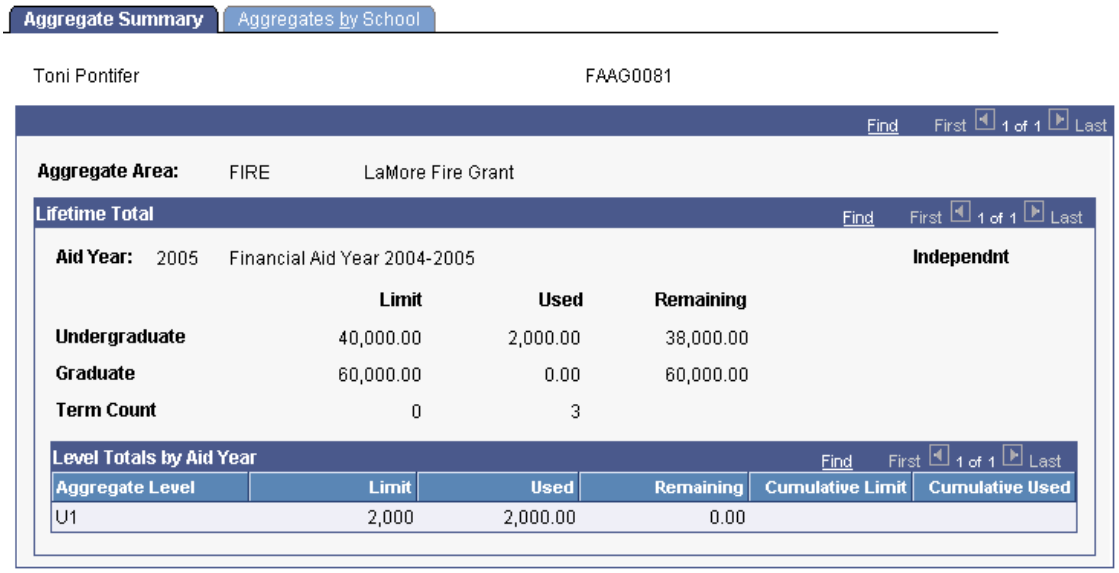
Only one pass evaluated – Final posted award: Item Type = 900000000810 2,000 USD:

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

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

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

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

Example 3

Item Type = 900000000815, Mackor Scholarship Grant II

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area - Level Limits

U1 = 2,000

U2 = 4,000

U3 = 5,000

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

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

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

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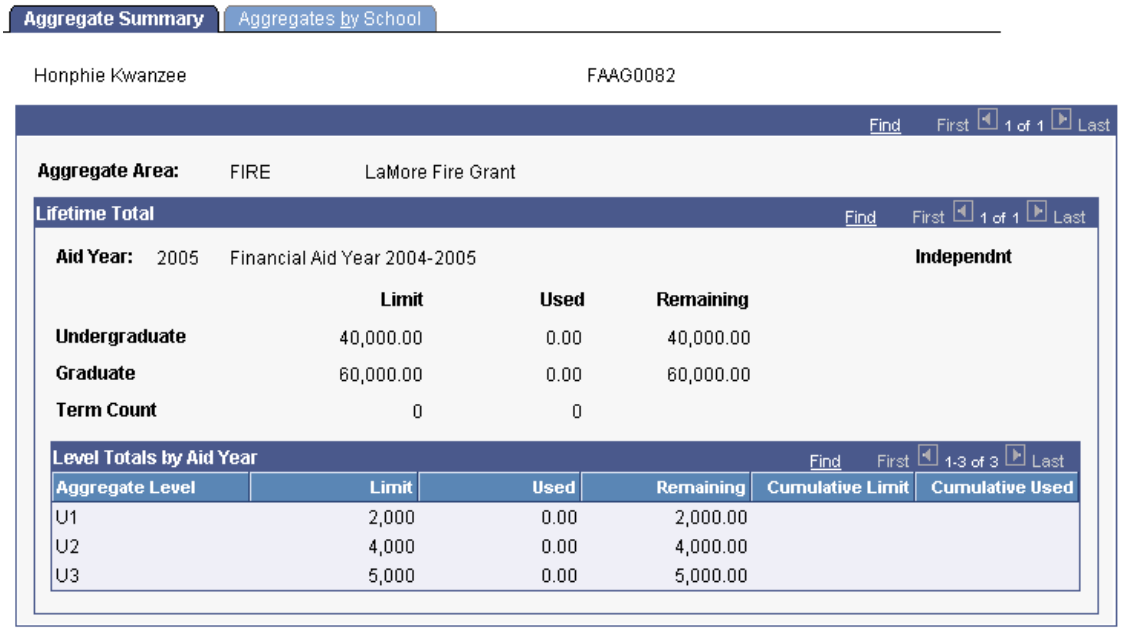
Term	Student's NSLDS Level	Aggregate Level used to assess limit	Award Sequence	Item Type	Aggregate Area	Split Code	Disb Detail
Fall	U1	N/A	02	900000000815	FIRE	05 - 0%	0.00
Winter	U2	U2	02	900000000815	FIRE	05 - 50%	1,000.00
Spring	U3	U2	02	900000000815	FIRE	05 - 50%	1,000.00

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

Term	Student's NSLDS Level	Aggregate Level used to assess limit	Award Sequence	Item Type	Aggregate Area	Split Code	Disb Detail
Fall	U1	N/A	03	900000000816	FIRE	04 - 0%	0.00
Winter	U2	N/A	03	900000000816	FIRE	04 - 0%	0.00
Spring	U3	U3	03	900000000816	FIRE	04 - 100%	1,000.00

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

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

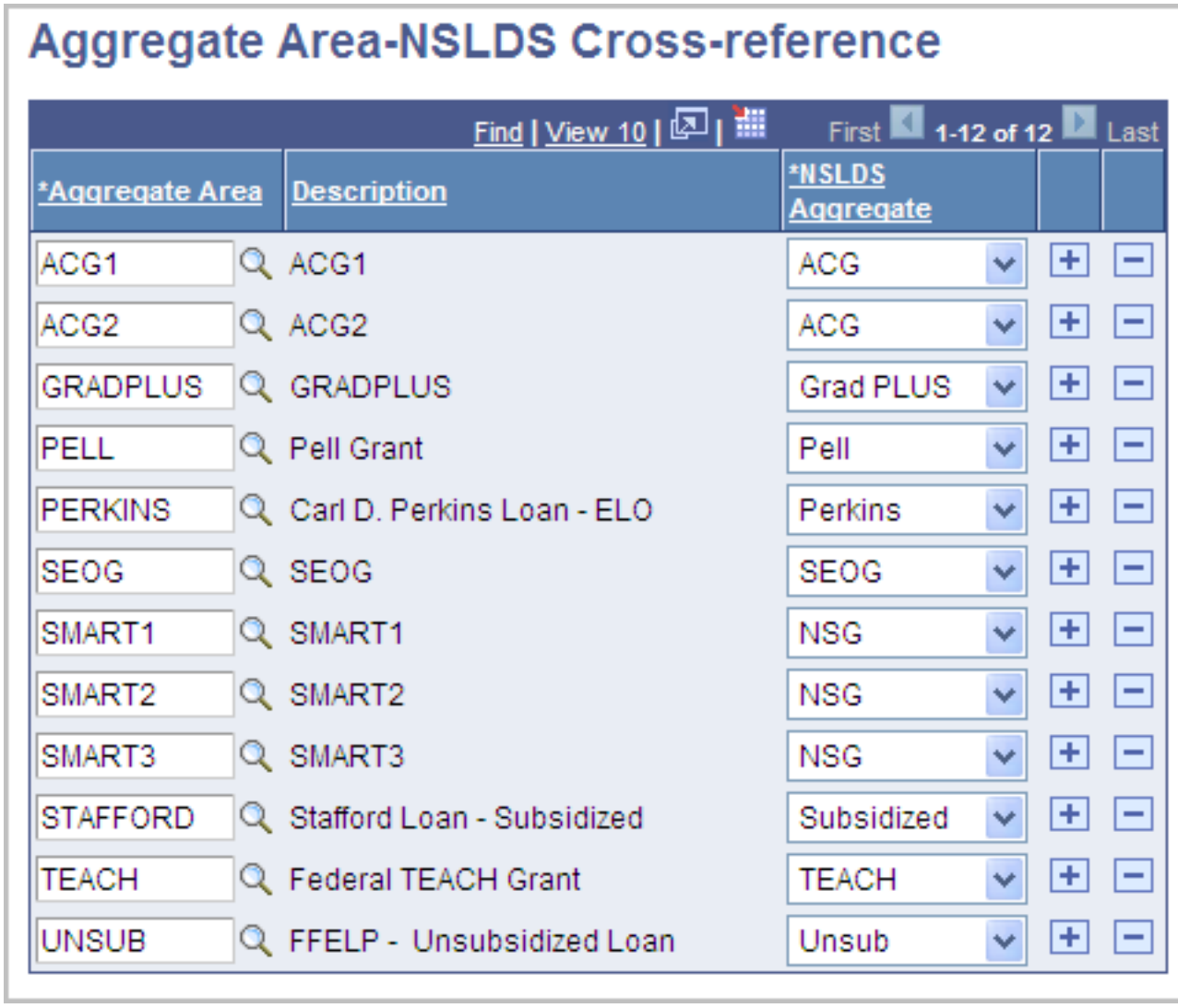


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Creating Aggregate Area Translations

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

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



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

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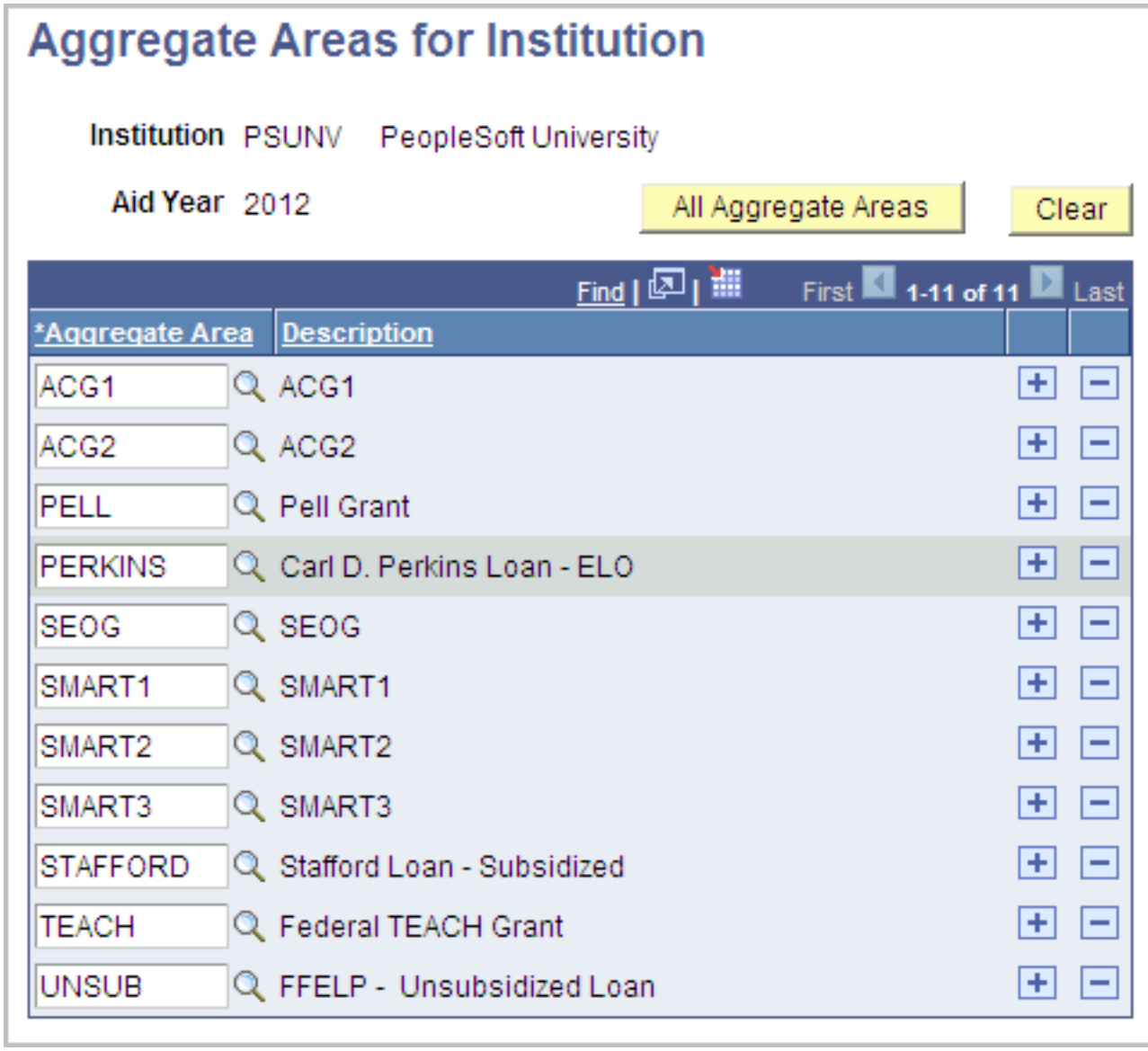
Field or Control	Description
Aggregate Area	Select the aggregate area to which you want to map an NSLDS aggregate category. If you have created multiple aggregate areas to correspond to a single NSLDS aggregate category, then enter the same number of instances of aggregate areas to correspond to the NSLDS aggregate category.
NSLDS Aggregate	For each aggregate area, select one of the available NSLDS aggregate categories. The aggregate programs used by the NSLDS Aggregate Push are:*Grad PLUS* (Graduate PLUS Loan), *Pell, Perkins* (Perkins Loan), *SEOG, Subsidized,TEACH,* or *Unsub*.

Selecting Aggregate Areas for Institutions

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

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

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

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

Related Topics

- Understanding the NSLDS Data Push Process
  To use NSLDS data in the Awarding and Packaging processes, you must ensure that the Packaging Processes are setup to use NSLDS as an aggregate source, load NSLDS Data

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via ISIR Load, FAH request, or TSM request, and push NSLDS data into aggregate aid tables used by the Packaging processes.

Setting Up Award Messages

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

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

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

This section discusses how to define award messages.

Related Topics

- Defining Disbursement and Anticipated Aid
  Access the FA Item Type 3 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 3**).

Pages Used to Set Up Award Messages

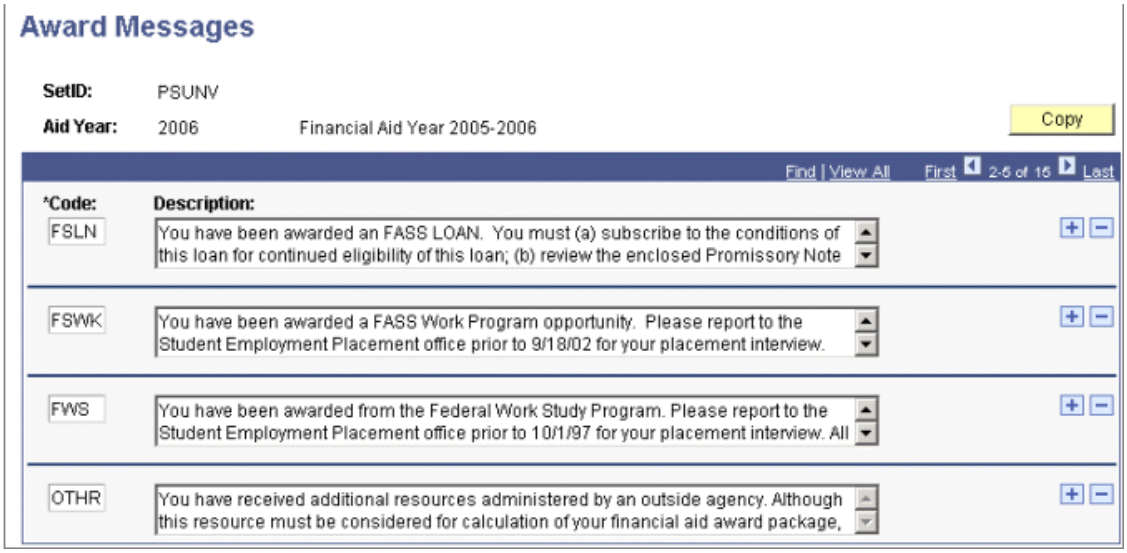
Page Name	Definition Name	Navigation	Usage
Award Messages	AWRD_MESSAGE_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Award Messages**, and then **Award Messages**	Define award messages that can be linked to financial aid item types.
Copy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

Defining Award Messages

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

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

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

Field or Control	Description
Code	Enter the four-character code that identifies the award message. This field is alphanumeric, and you can use less than four characters for the code.
Description	Enter the text of the award message. The message in this field is printed on the student's FAN letter.

Setting Up Loan Fees

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

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

This section discusses how to create loan fees.

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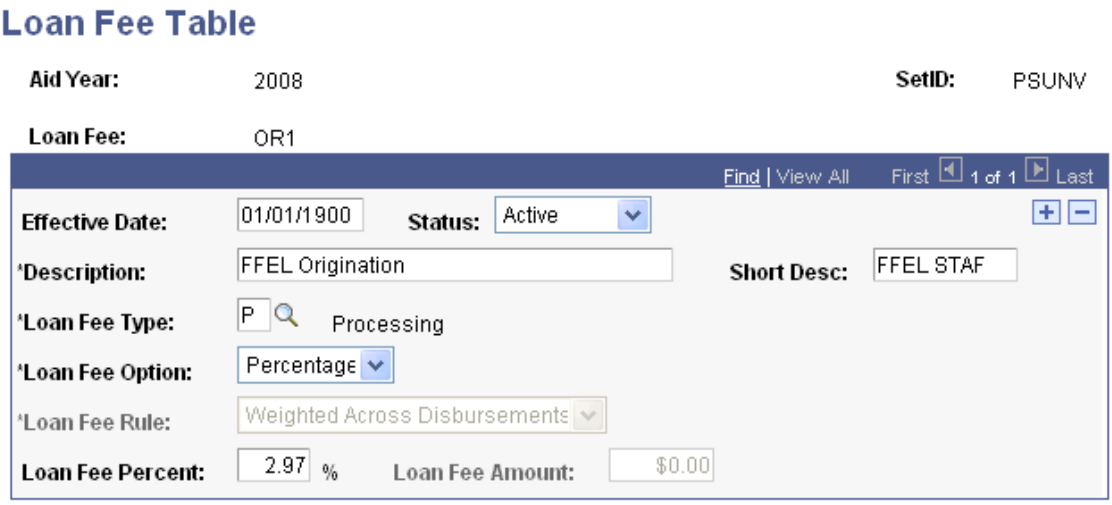
Page Used to Add Loan Fees

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

Creating Loan Fees

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

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



Field or Control	Description
Loan Fee Type	Select the value that indicates the purpose of the loan fee. Be sure to select *R—Rebate* if the loan fee is an interest rebate, used for the Direct Loan interest rebate. **Note:** Any Direct Loan with a zero rebate, must still have a Loan Fee Type attribute defined on the Financial Aid Item Type setup. Once a Direct Loan record is created and based on the Financial Aid Item Type, the appropriate XML Interest Rebate tag is reported to COD.

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Field or Control	Description
Loan Fee Option	Select the value that indicates how the amount of the loan fee is determined. *Flat:* The loan fee is a flat amount. If you select this value, you must select a **Loan Fee Rule** and enter the loan fee amount. *Percentage:* The amount of the loan fee is a percentage of the student's award amount. If you select this value, you must indicate the percentage in the **Loan Fee Percent** field.
Loan Fee Rule	This field is available only if you select *Flat* in the **Loan Fee Option** field. The loan fee rule determines how the Packaging process distributes the loan fee amount among disbursements. *All in 1st Disbursement:* The entire loan fee amount is subtracted from the first disbursement. *Weighted Across Disbursements:* The loan fee amount is split among the disbursements according to the disbursement split code percentages. Loan fee options and loan fee rules are delivered with the system as translate values that cannot be modified in any way. The Packaging process bases certain calculations on these values and changing them would have unforeseen consequences.
Loan Fee Percent	This field is available only if you select *Percentage* in the **Loan Fee Option** field. The loan fee amount is this percentage of the total award amount.
Loan Fee Amount	This field is available only if you select *Flat* in the **Loan Fee Option** field. Enter the total loan fee amount.

Processing Direct Loan Interest Rebate

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

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

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

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

Related Topics

- Attaching Loan Fees
  Access the FA Item Type 6 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 6**).

Defining Financial Aid Item Types

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

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

This section discusses how to:

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

Related Topics

- Student Financials: Setting Up Item Types and Item Type Groups

Pages Used to Define Financial Aid Item Types

Page Name	Definition Name	Navigation	Usage
FA Item Type 1	ITEM_TYPE_FA_1	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 1**	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.
Item Type Detail	ITEM_TYPE_TBL_SEC	Click the description of the item type on the FA Item Type 1 page.	View item type detail information from the item type table for this financial aid item type.

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Page Name	Definition Name	Navigation	Usage
Copy FA Item Type Data	ITEM_TYPE_FA_COPY	Click the **Copy** button on the FA Item Type 1 page.	Copy financial aid item type setup data from one setID, item type, aid year, and effective date combination. combination to another.
FA Item Type 2	ITEM_TYPE_FA_6	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**	Define awarding and rounding rules. Establish how the financial aid item type affects FM or IM need and enter rounding and remainder rules for the financial aid item type.
Equation Dtl (equation detail)	PKG_EQUATION_SEC	Click the **Equation Detail** link on the FA Item Type 2 page.	View the packaging equation attached to the **Selection Criteria** field. **Note:** The **Equation Detail** link only appears if you have a value selected in the **Selection Criteria** field.
FA Item Type 3	ITEM_TYPE_FA_3	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 3** **Note:** Applies to CS Financial Aid Anticipated Aid only.	Define disbursement and anticipated aid rules. Update anticipated aid information, authorization for disbursement, and award letter information.
FA Item Type 4	ITEM_TYPE_FA_4	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 4**	Set minimum and maximum award limits by the type of term (term category) as required.
FA Item Type 5	ITEM_TYPE_FA_5	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 5**	Define default disbursement plans and split codes for each academic career, which enables you to enter data quickly on the award entry pages manually as well as for award rules on packaging plans.

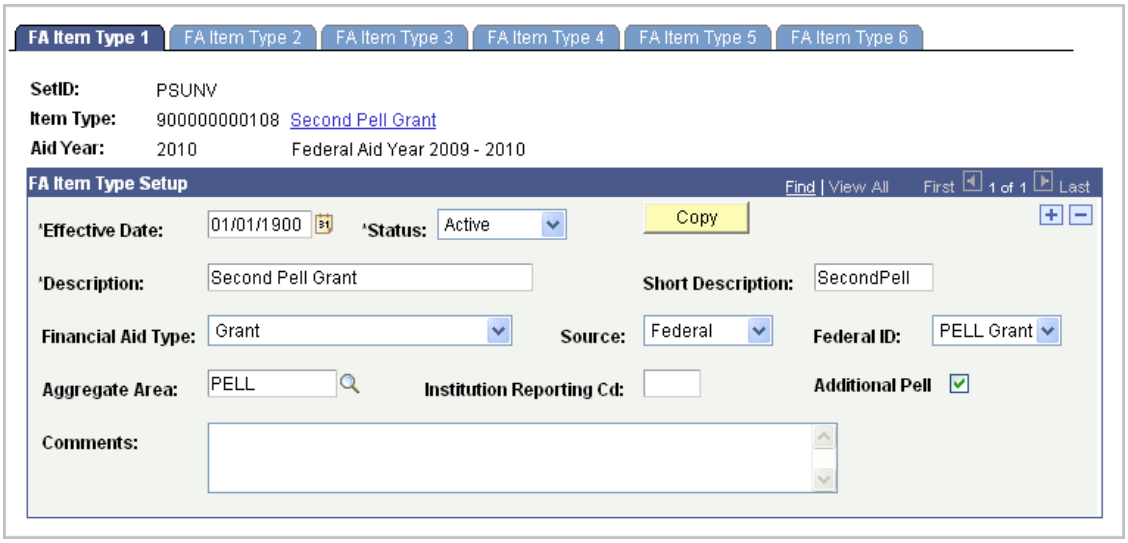
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Page Name	Definition Name	Navigation	Usage
FA Item Type 6	ITEM_TYP_FA_LN_FEE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 6**	Attach loan fee codes for loan item types.

Defining Financial Aid Item Type Descriptions

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

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



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

Field or Control	Description
Financial Aid Type	Select the type of financial aid or category of funding.
Source	Select the source of this financial aid funding.

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Field or Control	Description
Federal ID	This field is available only if you select *Federal* as the source. Select the federal program associated with this item type. To have the correct federal program rules applied during financial aid processing, you must select the correct federal program in this field. Values are: *GAANN* (Graduate Assistance in Areas of National Need), *Grad PLUS, HEAL, HPSL,IASA* (Iraq/Afghan Service Award, *LDS, Javits* (Jacob K. Javits Fellowship), *NIH* (National Institute of Health), *NSF* (National Science Foundation),*Nursing Ln* (nursing loan), *Other* (Other Federal Fund), *PCL, PELL Grant, PLUS, Perkins Ln* (Perkins Loan), *SEOG, Subsidized, TEACH, Unsubsidized,* or *Work Study.* **Note:** When packaging a student whose parent was killed in Iraq or Afghanistan in service of the United States armed forces after September 11, 2001: - if the student is Pell Grant eligible, use Professional Judgment to award the student a maximum Pell Grant. - if the student is *not* Pell Grant eligible, use any of the packaging methods (manual, auto, batch) to award the student an IASA in the amount of a maximum Pell Grant.
Aggregate Area	Select an aggregate area to associate with this item type if you want to limit or track aggregate aid for this financial aid item type. Each financial aid item type can be associated with only one aggregate area, but an aggregate area may be composed of several financial aid item types.
Institution Reporting Cd (institution reporting code)	Enter a user-defined institutional reporting code for this item type. This optional field is available for your institutional reporting needs.
MPN Required	This field appears when you select a**Federal ID** of *Perkins Ln.* Select to indicate that an MPN is required for the financial aid item type awarded to the student. The Perkins MPN electronic signature and print processes use this flag to determine which financial aid item types should be assessed if an MPN is required. If selected, the financial aid disbursement authorization process requires a valid Perkins MPN before the award can be authorized and disbursed.
Additional Pell	This check box appears when you select a **Federal ID** of *PELL Grant.* Select to indicate that this financial aid item type represents a Pell2 (Additional Pell Grant).

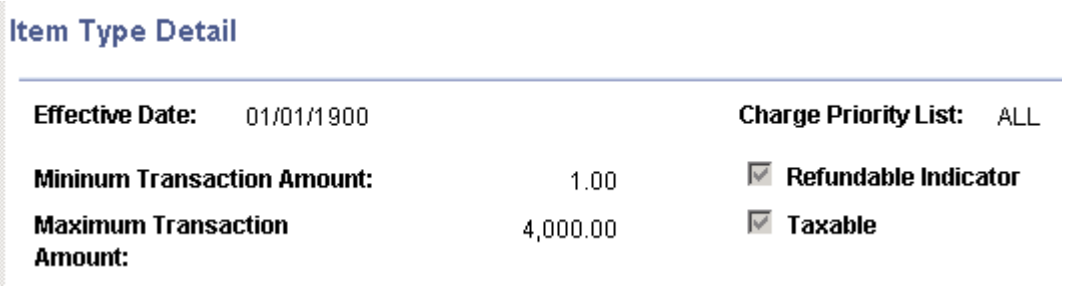
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> **Note**
>
> It is recommended that you create new item types and corresponding financial aid item types when enabling the new Perkins MPN process. This enables you to track new Perkins MPNs and does not have a negative effect on those individuals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

Viewing Item Type Detail

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

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



Field or Control	Description
Charge Priority List	Identifies the charge priority list assigned to the item type. The system uses charge priority lists for financial aid item types that have payment application restrictions. Charge priority lists tell the system how to distribute excess funds and the types of charges towards which the item type can be applied.
Minimum Transaction Amount and **Maximum Transaction Amount**	Displays the minimum and maximum annual amount established for this item type on the Item Type Amount Edits page.
Refundable Indicator	Indicates whether the item type can be refunded later. This value comes from the Item Type - Miscellaneous Edits page.
Taxable	PeopleSoft Payroll uses this field to calculate withholdings on awards of this item type. If you do not use PeopleSoft Payroll, clear this check box. This value comes from the Item Type - Miscellaneous Edits page.

Related Topics

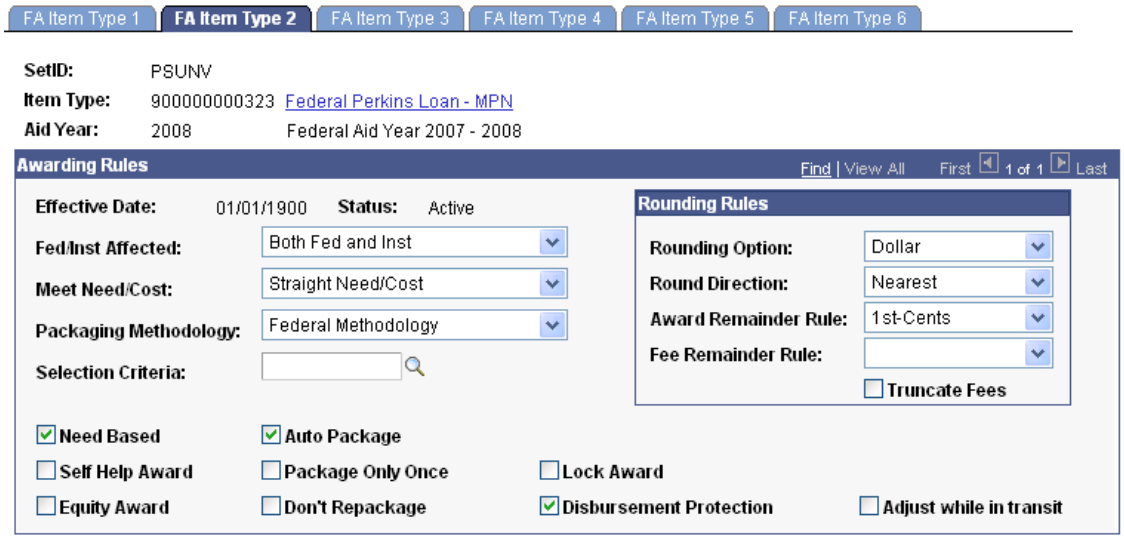
- Student Financials: Defining Charge Priority List Rules

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Defining Awarding and Rounding Rules

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

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



Awarding Rules

Field or Control	Description
Fed/Inst Affected (federal/institutional affected)	Select which need this financial aid item type reduces. *Federal Only:* This financial aid item type should reduce *only* federal need and not reduce institutional need. *Both Fed and Inst* (both federal and institutional): This financial aid item type should reduce federal *and* institutional need. If your institution is using institutional awarding, select this value.

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Field or Control	Description
Meet Need/Cost	Select how need—based on your selection the **Fed/Inst Affected** field—is adjusted or reduced when you award this financial aid item type. Financial Aid maintains an unmet need balance (COA minus EFC/SAI minus aid awarded) and an unmet COA balance (COA minus aid awarded). Select a value to determine how awards of this financial aid item type affect these two balances: *Conditional:* Indicates an award made without regard to budget or need if federal aid has not been awarded at the time of this award. However, if federal aid precedes this award, conditional awards behave like special need/cost awards. *Cost Only:* The awarded amount affects only the unmet COA balance. *Need Only:* The awarded amount affects only the unmet need balance. *No Effect:* The awarded amount does not affect the unmet need or unmet COA balances. Ensure that you understand the results before using this option. *Special Need/Cost:* The Packaging process first determines whether unmet need exists. The system always reduces unmet need first. Then the process compares the remaining unmet COA against the student's EFC/SAI and awards up to the lesser of the two. This is the preferred attribute for unsubsidized Stafford and PLUS loans. Special need/cost aid reduces both the unmet need and unmet COA balances. *Straight Need/Cost:* The awarded amount affects both the unmet need and unmet COA balances.

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Field or Control	Description
Packaging Methodology	Select the need—federal or institutional—the Packaging process should use to determine the amount for awards of this item type. *Federal Methodology:* The Packaging process uses FM need to determine the award amount. FM need is the federal cost of attendance minus the student's FM EFC/SAI. Use this attribute for federal item types. *Institutional Methodology:* The Packaging process uses IM need to determine the award amount. IM need is the institutional cost of attendance minus the student's IM EFC. **Note:** If you use institutional methodology to estimate federal awards prior to the beginning of the federal awarding cycle (January 1st), selecting *Institutional Methodology* for federal awards enables a more realistic remaining need calculation. The remaining need calculation is more realistic because you have an IM EFC but no federal EFC/SAI, and, therefore, the system uses IM need rather than FM need. You must effective date these federal financial aid item types so that beginning January 1, the packaging methodology is *Federal Methodology* to ensure the system uses FM need rather than IM need when awarding federal sources of aid.
Selection Criteria	To use an equation to select a population of students eligible to receive this item type, select the equation here. For example, you define a particular population of students to be awarded, such as students who have exceptional grade point averages and whose FM need is high. You create a packaging equation to select this student group, then link this student group to this item type by selecting the equation in this field. The **Equation Detail** link appears only after you select an equation. See Viewing and Editing Equations.
Need Based	Select if need is considered when awarding this item type. This check box is used for reporting only.
Equity Award	Select to evaluate this financial aid item type as an equity award. Equity awards are considered to be "free money" to students such as grants or scholarships. Financial aid item types defined as equity awards adhere to the equity limit established in a packaging plan where the equity financial aid item type is a packaging rule. See Defining Packaging Equity Limits and Offsets.

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Field or Control	Description
Auto Package	Select to have the financial aid item type available for selection in automated packaging—Auto Packaging and Mass Packaging. To have this financial aid item type available for use in packaging plans, you must select this check box.
Disbursement Protection	If this check box is selected, the Packaging process protects the disbursed portion of this financial aid item type from being reduced during repackaging sessions using any packaging method—Auto, Mass, or Manual Packaging. After you enable disbursement protection, an award of this financial aid item type cannot fall below the disbursed amount. When using manual packaging, especially for custom splits, the accept balance cannot be less than the disbursed balance on the Award Disbursement Detail page. The only way to reduce a disbursed amount when disbursement protection is active is to adjust the award on the Professional Judgement page. Do not activate disbursement protection for Direct Loan financial aid item types. The treatment of Direct Loan adjustments is similar to the processing behavior invoked by disbursement protection. **Note:** If you do not select this check box, disbursed amounts can be reduced and recalculated. See Protecting Disbursements During Awarding.
Self Help Award	Select if this item type is work-study or a loan. This field is for informational or reporting purposes only.
Lock Award	Select if you want to lock awards of this financial aid item type automatically when awarding as part of a packaging plan. Locking an award prevents Auto and Mass Packaging from automatically canceling this award. All awards that you manually enter are automatically locked, whether this check box is selected or not. See Using Auto Packaging and Auto Select Packaging.

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Field or Control	Description
Package Only Once	Select to prevent this financial aid item type from being awarded more than once to the student for the aid year for the same career, even if the student is eligible to receive the award during a subsequent Packaging process. For this check box to function properly, you must keep the following in mind: To preserve the award made with the first instance of the financial aid item type, you must lock the first instance of the item type, selecting the **Lock** check box on the award entry page. If the first instance of the financial aid item type is not locked on the award entry page, the first instance of the financial aid item type is canceled and may be replaced by a future instance of the financial aid item type. Although a financial aid item type is not awarded more than once, unless you lock the first instance, it can be replaced by any future instances. If the student has multiple careers across terms —Undergraduate for Term 1 and Graduate for Term 2—the **Package Only Once** check box does not prevent a financial aid item type from being awarded once for each career for the student. This could cause the financial aid item type to be awarded more than once in the aid year, but only once for each career. This is because the Package Only Once attribute is not evaluated when the first career's awards are passed to the second career as passive awards. The Package Only Once attribute does not work if two instances of the financial aid item type exist within a packaging plan. This is because the first instance is not yet posted before the second instance is considered. In this case, both instances are awarded if the student is eligible.

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Field or Control	Description
Auto assign lowest sequence	This check box only appears if Meet Need/Cost is *Conditional.* Select to have awards of this financial aid item type automatically assigned the lowest possible sequence number in the student's financial aid package when you enter the conditional award on the Manual Student Packaging page *only.* For example, this check box is selected, and a student's package already contains three awards with sequence numbers of 10, 20, and 30. You enter a new conditional award, and the system assigns the conditional award a sequence number of 09. If the check box is cleared, the system assigns the new conditional award a sequence number of 40. Automatically assigning conditional awards the lowest sequence number is useful when you have individuals outside the financial aid office (such as departmental office staff) entering conditional awards (like departmental scholarships) on the Manual Student Packaging page. The financial aid office staff can then review the student's package to see if the conditional award affects the student's need with other forms of aid. If the conditional award entered by individuals outside the financial aid office is not automatically assigned the lowest sequence number, the student's need may be met before the Packaging process reaches the conditional award. Consequently, the student may not receive the conditional award.
Equation Detail	Click to access the Equation Summary page to view the packaging equation attached to the selection criteria.

Rounding Rules

Field or Control	Description
Rounding Option	Select how you want awards of this financial aid item type rounded when rounding is necessary. Values are: *10 dollars:* The Packaging process rounds award amounts to the nearest 10-dollar amount. *100 dollars:* The Packaging process rounds award amounts to the nearest 100-dollar amount. *5 dollars:* The Packaging process rounds award amounts to the nearest 5-dollar amount. *Dollar:* The Packaging process rounds award amounts to the nearest dollar. *None:* The Packaging process does not round award amounts for this financial aid item type.

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Field or Control	Description
Round Direction	Select the direction you want the Packaging process to use when rounding award amounts. If you select *None* as the rounding option, do not select a round direction. *Down to:* The Packaging process truncates, or rounds, the award amount down to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option. *Nearest:* The Packaging process rounds the award to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option. The process determines the dollar amount to which the award amount is closest, and then rounds up or down accordingly. *Up to:* The Packaging process rounds the award amount up to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option.
Award Remainder Rule	When an award is rounded and split across disbursements, there can be an odd dollar or cent amount left over. The award remainder rule indicates where you want the Packaging process to place odd amounts. *1st-Cents:* If cents remain, the Packaging process assigns the remaining amount to the first scheduled disbursement. *1st-Dllrs* (1st dollars): If dollars remain, the Packaging process assigns the remaining amount to the first scheduled disbursement. *Last-Cents:* If cents remain, the Packaging process assigns the remaining amount to the last scheduled disbursement. *Last-Dllrs* (last dollars): If dollars remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

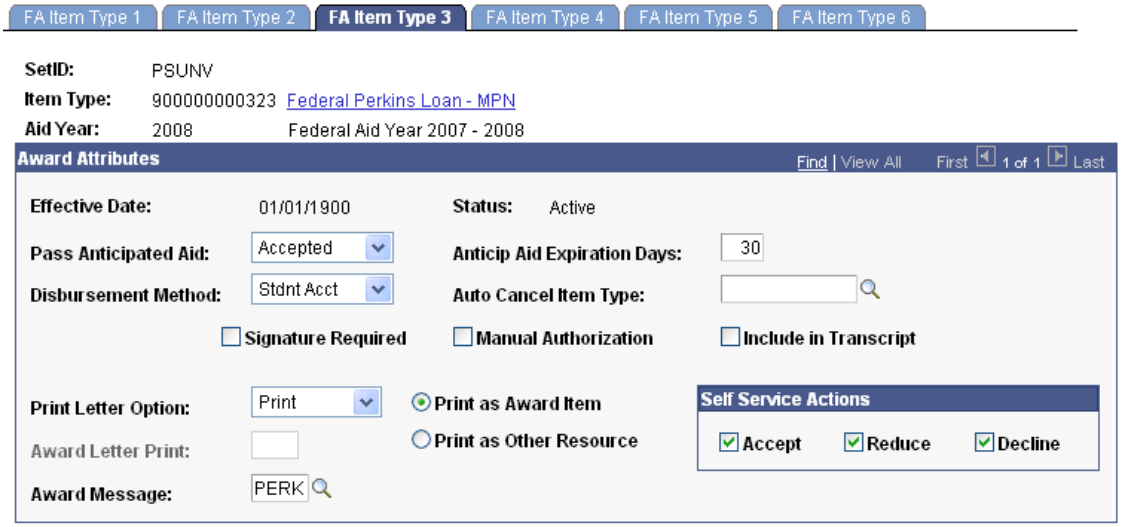
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Field or Control	Description
Fee Remainder Rule	This field is available only for financial aid item types with a financial aid type of *Loan* on the FA Item Type 1 page. Select how the Packaging process handles remaining dollars or cents after loan fees have been applied to an award. You can either select a value in this field, or you can select the **Truncate Fees** check box, but not both. *First Disb – Cents:* If cents remain, the Packaging process assigns the remaining amount to the first scheduled disbursement. *First Disb – Dollars:* If dollars remain, the Packaging process assigns the remaining amount to the first scheduled disbursement. *Last Disb – Cents:* If cents remain, the Packaging process assigns the remaining amount to the last scheduled disbursement. *Last Disb – Dollars:* If dollars remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.
Truncate Fees	Select to disregard any cents left over after the Packaging process has applied loan fees to the award amount. Use only for Direct Lending loans. You can select this check box, or you can select a value in the **Fee Remainder Rule** field, but not both.

Defining Disbursement and Anticipated Aid

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

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



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Field or Control	Description
Pass Anticipated Aid	Select when an award appears as anticipated aid in the student's Student Financials record. Awards appear as anticipated aid on the student's account when the status of the award matches the value in this field. For example, if you select *Accepted,* and an award of this financial aid item type has a status of *Accepted,* the award appears as anticipated aid on the student's bill. For loan awards, the net amount of the loan (award amount minus any loan fee adjustments) is displayed as anticipated aid. *Accepted:* Awards of this financial aid item type with a status of accepted or authorized appear as anticipated aid. *Authorized:* Awards of this financial aid item type with a status of authorized appear as anticipated aid. *None:* Awards of this financial aid item type never appear as anticipated aid. For example, you do not want work study to appear as anticipated aid in this system because work study funds are not allocated to the student until the money is earned. Therefore, you select *None* for the work study financial aid item type. *Offered:* Awards of this financial aid item type with a status of offered, accepted, or authorized appear as anticipated aid.
Anticip Aid Expiration Days (anticipated aid expiration days)	An expiration date accompanies each anticipated aid amount and enables you to "expire" a financial aid item type if the criteria for its awarding are not met by the date you assign. The number of days you enter in this field works with several other dates on the anticipated aid record to determine when to expire the anticipated aid. *Date* is the date the award becomes anticipated aid. *Apply Date* is the date you are requesting to apply the disbursement to the student's account. The expiration date is the later of the two calculated dates: *Date* plus the number of anticipated aid expiration days Or *Apply Date* plus the number of anticipated aid expiration days
Print as Other Resource	In addition to veteran's benefits and Americorp benefits, you can identify another resource item type that prints as another resource under the award section of the FE FAN. The system does not count this other resource amount in the annual and term totals. It displays this amount in the estimated resources section of the FE FAN as other resources. Select to print the other resource item type under the award section on the FAN.

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

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

Field or Control	Description
Disbursement Method	Identify where Financial Aid transfers any disbursed financial aid amounts. *No*: The funds are not disbursed into the student's Student Financials account because the student is paid directly. Work-study financial aid item types use this disbursement method. **Note:** When the **Disbursement Method** is set to *No*, the Financial Aid Item Type is not included in the Disbursements page in Student Self Service Fluid interface. Also, when you click on the award from the Summary page in Student Self Service, the Award Details page does not display disbursement related information. *Stdnt Acct* (student account): The disbursed amount is transferred to the student's account in Student Financials.
Auto Cancel Item Type	If an existing award of a particular financial aid item type should be automatically canceled when an award of this financial aid item type is subsequently awarded manually on either the Student Aid Package page or the Manual Student Packaging page, enter the financial aid item type to be canceled in this field. This enables you to award using an *estimated* financial aid item type and then replace it with the *actual* financial aid item type when funds have been approved or certified. For example, you may have estimated a state grant and then replaced the award with an actual state grant award. This feature functions only during manual awarding. It does not work with auto packaging or mass packaging.
Signature Required	Select if you require a signature from the student for the student to receive this particular financial aid item type as part of an award. For example, you could use this for a loan where the student must sign a promissory note before any money is disbursed. This field is for informational purposes only; it has no effect on loan processing.

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Field or Control	Description
Manual Authorization	Select to disburse this financial aid item type using manual authorization. The system cannot authorize this financial aid item type for disbursement using the background authorization process if you select this check box. One use of this feature is for scholarships where you must review a roster or have checks that must be verified prior to authorization of the aid.
Include in Transcript	Indicates that the financial aid item type should appear on the financial aid transcript (FAT). This field is not supported because U.S. Department of Education no longer supports the FAT.
Print Letter Option	Select whether to print awards of this financial aid item type on the FAN letter or a custom letter, or to not print notification of the award at all. *Custom:* Awards of this financial aid item type are printed in an institutionally configured standard letter of your choice rather than the delivered FAN letter. If you select this value, you must specify a standard letter code value in the **Award Letter Print** field. As an example, you may want to generate a specific scholarship letter for the JP Memorial award recipients. The custom option enables you to modify the letter by inserting the JP Memorial awarded amount within the letter, which you must specify by its standard letter code in the **Award Letter Print** field. *Never:* Awards of this financial aid item type are never printed in the FAN letter or an institutionally modified letter. *Print:* Awards of this financial aid item type are printed on the FAN letter. You must also indicate whether awards of this financial aid item type should be treated as award items or as other resources—such as student contribution and parent contribution—using the **Print as Award Item** and **Other Resource** options.
Print as Award Item	Available only if you select *Print* in the **Print Letter Option** field. Select to have awards of this financial aid item type included in the total aid offered amount on the FAN letter and listed as awards.
Other Resource	Available only if you select *Print* in the **Print Letter Option** field. Select to have awards of this financial aid item type considered as resources and included in the other resources total on the FAN letter, but not listed as awards.

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Field or Control	Description
Award Letter Print	Available only if you select *Custom* in the **Print Letter Option** field. Select the standard letter code of the letter to modify using the award amount.
Award Message	(Optional) To have a specific award message print on an award notification or a custom letter for awards of this financial aid item type, select the award message in this field. The award messages available for selection are defined on the Setting Up Award Messages page.

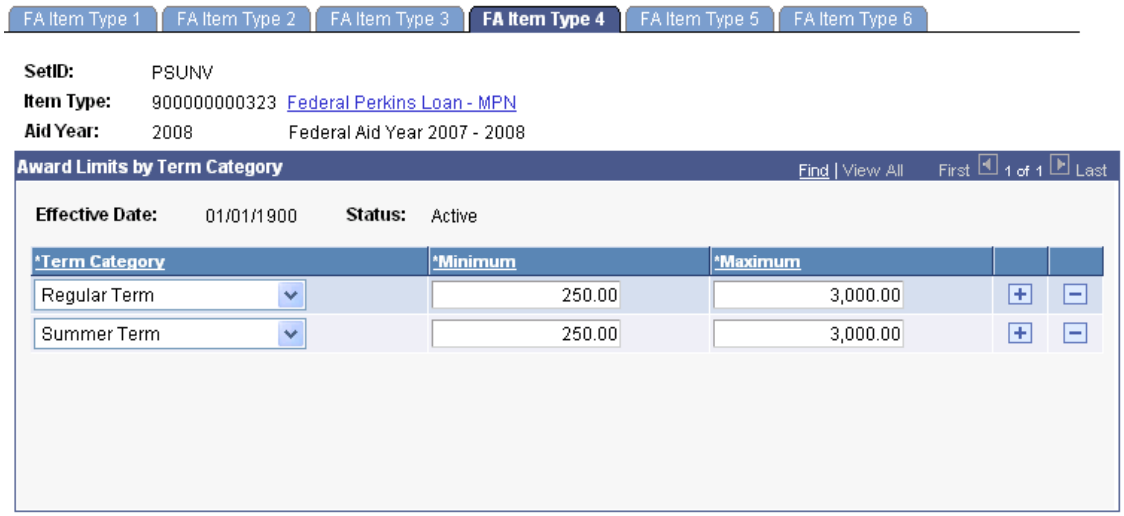
Related Topics

- Campus Community Fundamentals: Defining Letter Codes
- Campus Self Service: Setting Up Institution Sets

Setting Term Minimum and Maximum Award Limits

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

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



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Field or Control	Description
Term Category	Select the term type for which you are specifying minimum and maximum award limits. The automated Packaging process uses the financial aid item type term limits from this page, annual item type limits from the Item Type page, fiscal limits, financial aid item type annual limits from the packaging plan, and, if defined, any aggregate area limits to determine the correct amount to award. Term category values are delivered with your system as translate values. These values are used extensively in Student Records. Coordinate any revision of these values with student records staff. Insert additional rows to add more term categories.
Minimum and **Maximum**	Enter the minimum and maximum award limits for terms of the associated term category. Remember that this amount is per term, not per aid year. To ensure that the Packaging process processes without fault, minimums should not be less than 1.00 USD. You must set this field to a nonzero amount for your gap financial aid item types. If the maximum award limit is 400.00 USD (for a term), the item type limit is 1,000.00 USD (for the aid year), and your institution has two semester terms, the maximum award for this financial aid item type is 800.00 USD (400.00 USD for each term). If your institution has three quarter terms, the maximum amount based on the term maximum amount is 1,200.00 USD (400.00 USD for three terms) but this exceeds the item type limit for the aid year. The actual maximum for this financial aid item type is 1,000.00 USD—the item type limit for the aid year. The financial aid item type term maximum cannot override the item type maximum.

Related Topics

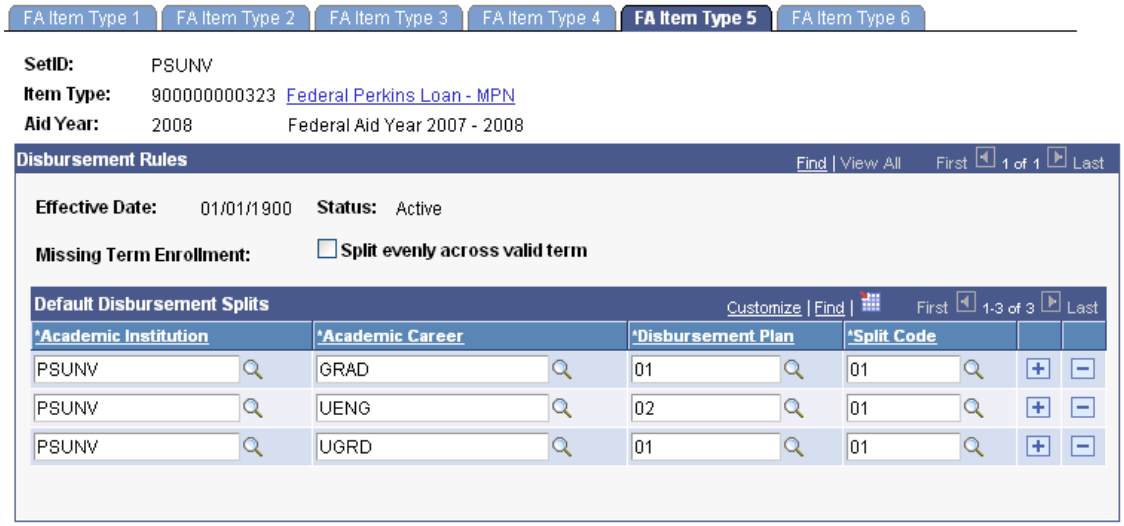
- Campus Solutions Application Fundamentals: Defining Terms

Defining Default Disbursement Plans and Split Codes

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

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

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Disbursement Rules

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

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

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

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

See Calculating Pell Grants.

Default Disbursement Splits

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

Field or Control	Description
Disbursement Plan	Enter the default disbursement plan for the financial aid item type when awarded for the selected career and institution.
Split Code	Enter the default split code for the financial aid item type when awarded for the selected career and institution.

Related Topics

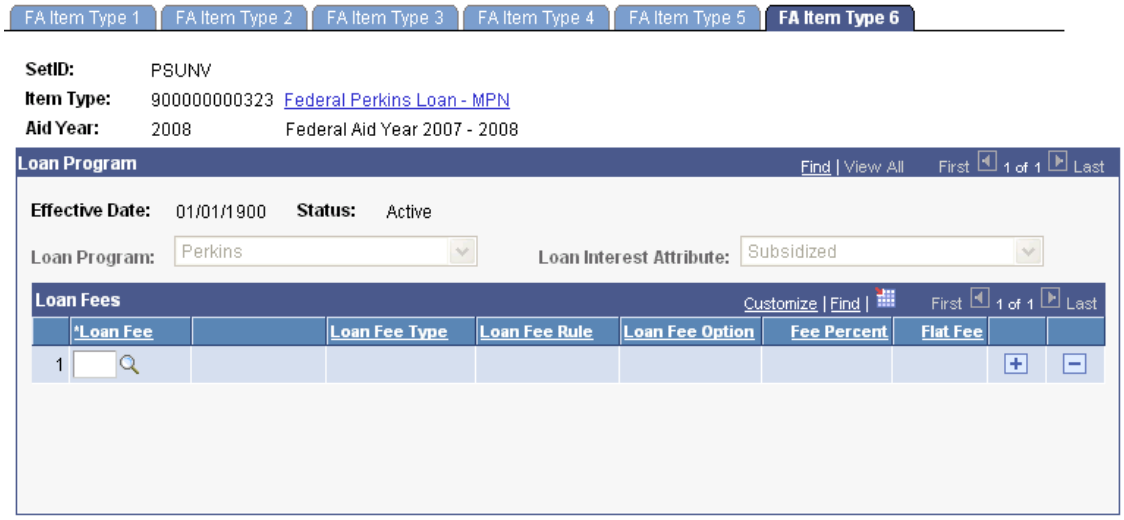
- Defining Default Disbursement Plans and Split Codes
  Access the FA Item Type 5 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 5**).

Attaching Loan Fees

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

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

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Loan Program

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

Field or Control	Description
Loan Program	Enter the type of loan program tracked by the aggregate area.
Loan Interest Attribute	Enter whether the loan servicer pays the interest on the loan. *Subsidized:* The loan servicer pays the interest on the loan while the student is in school, during the repayment grace period, and during any deferment periods. *Unsubsidized:* The loan servicer does not pay the interest on the loan.

Loan Fees

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

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

See Setting Up Loan Fees.

Calculating Actual Loan Fees for CommonLine Loans

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

See Reviewing CL 4 Status and Phase Codes.

Calculating Direct Loan Interest Rebate

You must insert the Direct Loan rebate loan fee you set up on the Loan Fee Table page on the FA Item Type 6 page for all Direct Loan financial aid item types. The up-front interest rebate amount of 1.5 percent of the gross disbursement is calculated at the disbursement level for each Direct Subsidized, Direct Unsubsidized, and Direct PLUS loan. The interest rebate amount is added after the 3 percent loan fee is subtracted from the gross disbursement amount. For example, a student receives a Direct Loan of 1,000.00 USD for the fall 2004 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent interest rebate of 15.00 USD is added back into the loan.

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

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

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

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

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

Related Topics

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

Defining Gap Financial Aid Item Types

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

To create a gap financial aid item type:

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

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

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

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

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

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

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

   See Establishing Defaults.

Budgeting Fiscal Limits

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

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

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

Understanding Fiscal Limits

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

If you have not set up fiscal limits:

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

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

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

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

Pages Used to Budget Fiscal Limits

Page Name	Definition Name	Navigation	Usage
Assign Fiscal Limits	ITEM_TYPE_FISCL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Fiscal Item Types**, and then **Assign Fiscal Limits**	Assign fiscal limits to financial aid item types. Define the maximum amount of money that can be offered, accepted, and disbursed for a financial aid item type.

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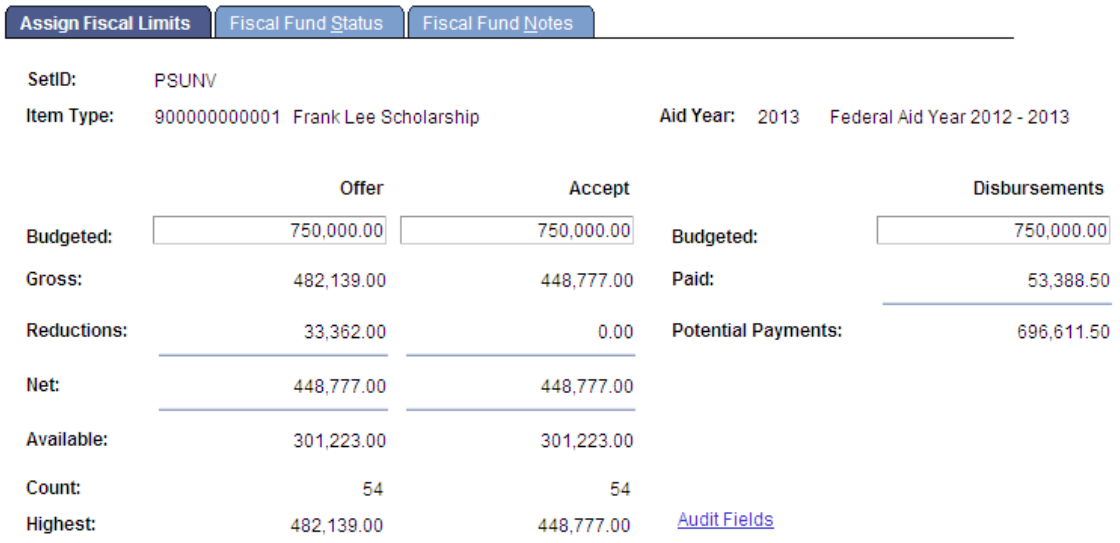
Page Name	Definition Name	Navigation	Usage
Fiscal Item Type Audit	SFA_IT_FISCAL_SEC	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Fiscal Item Types**, and then **Assign Fiscal Limits**, and then **click Audit Fields link.**	Click this link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

Assigning Fiscal Limits to Financial Aid Item Types

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

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

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Field or Control	Description
Budgeted – Offer	The maximum source of funding you can offer for this financial aid item type.
Budgeted – Accept	The maximum source of funding that can be accepted for this financial aid item type.
Gross – Offer	The sum of all gross offered amounts from each student who received this financial aid item type award. For example, if the student were initially offered 800.00 USD, then 800.00 USD would be added to this sum. If the student was later offered 300.00, 800.00 USD would still be the gross offered amount.
Gross – Accept	The sum of all gross accepted amounts from each student who received this financial aid item type award. For example, if the student initially accepted 800.00 USD, then 800.00 USD would be added to this sum. If the student later accepted 300.00, 800.00 USD would still be the gross accepted amount.
Reductions – Offer	The sum of the reduced offer amounts from each student for this financial aid item type. If a student is offered 800.00 USD for this item type and later the offer is reduced to 600.00 USD, then 200.00 USD is added to the sum. If the award is reduced again for the student, then the additional reduction amount is added to the sum.
Reductions – Accept	The sum of the reduced accept amounts from each student for this financial aid item type.
Net – Offer	The sum of the current offer amounts for this financial aid item type.
Net – Accept	The sum of the current accept amounts for this financial aid item type.

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Field or Control	Description
Available – Offer	The remaining source of funding available to award students for this financial aid item type. Equals the **Budgeted – Offer** minus the **Net – Offer.**
Available – Accept	The remaining amount available for students to accept for this financial aid item type. Equals the **Budgeted – Accept** minus the **Net – Accept.**
Count – Offer	The number of students (unduplicated) who have been offered an award of this financial aid item type. Does not include students that have canceled or declined awards.
Count – Accept	The number of students (unduplicated) who have accepted an award of this financial aid item type. Does not include students that have canceled or declined awards.
Highest – Offer	The sum of all the highest offer amounts from each student who received this financial aid item type award. If a student were initially offered 500.00 USD, then 500.00 USD would be added to this sum. If the student was later offered 800.00 USD, then 500.00 USD would be subtracted and 800.00 USD would be added to the sum because it is the highest amount offered to the student. This amount enables you to know what your maximum total offer amount is for this financial aid item type.
Highest – Accept	The sum of all the highest accepted amounts from each student who received this item type award. This amount enables you to know what your maximum total accepted amount is for this financial aid item type.

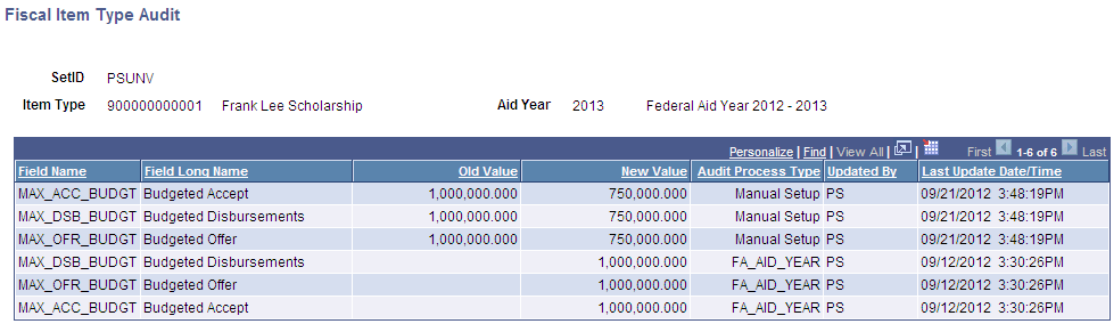
Here is an example of how the amounts in the Gross, Reductions, Net, and Highest columns are calculated. This example tracks only one student. On the page itself, the values shown are added to similar values for all other students who are awarded the financial aid item type.

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

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Field or Control	Description
Budgeted – Disbursements	The amount you want to budget for the total disbursements of this financial aid item type.
Paid – Disbursements	The amount that has been authorized and disbursed to students from this financial aid item type.
Potential Payments – Disbursements	The remaining amount available to disburse to students for this financial aid item type. Equals the **Budgeted – Disbursements** minus the **Paid – Disbursements.**
Audit Fields	Click this link to view the **Fiscal Item Type Audit** page.

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



Fiscal Item Type Audit

SetID PSUNV

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

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

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

Warning

Once the Fiscal Item Type Audit Trail has been established with manual changes to the Budgeted Offer, Accept or Disbursement balance, running the Aid Year Rollover process (**Audit Process Type** of *FA_AID_YEAR*) with the "Override Aid Year" attribute selected *deletes all of the existing Audit Trail rows* and newly creates the Fiscal Item Type Audit Trail.

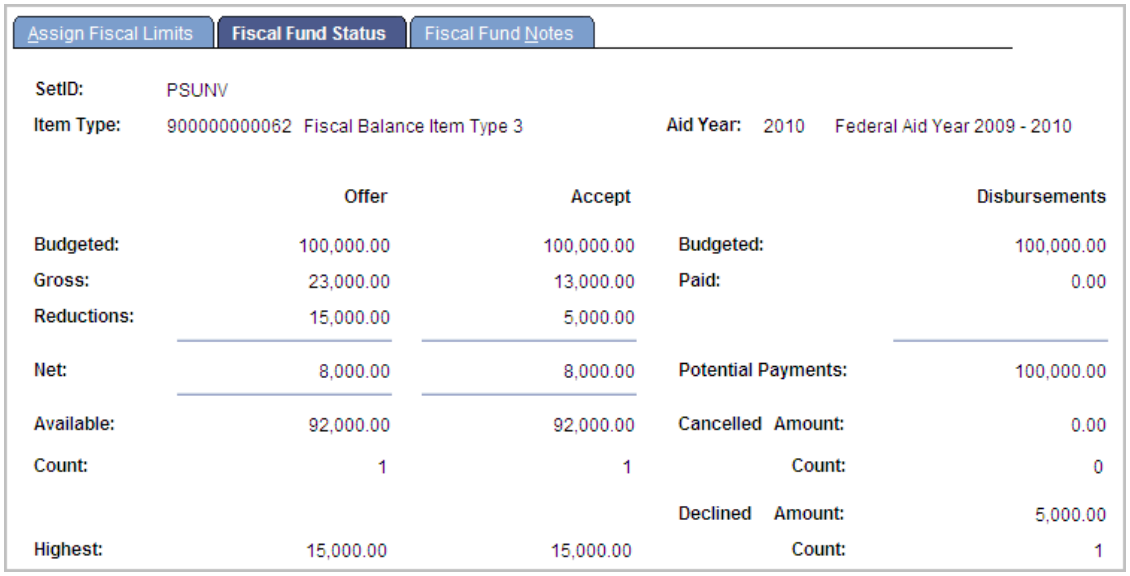
Because the Fiscal Item Type Audit Trail is a child table to the ITEM_TYP_FISCL table, Aid Year Rollover deletes the parent ITEM_TYP_FISCL table as part of the override action. The effect is that all previous audit trail entries are lost. If you wish to retain the audit trail entries before running subsequent Aid Year Rollover jobs, consider downloading the Fiscal Item Type Audit Trail entries contained in the grid into an Excel spreadsheet for retention.

Reviewing Fiscal Fund Status

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

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

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

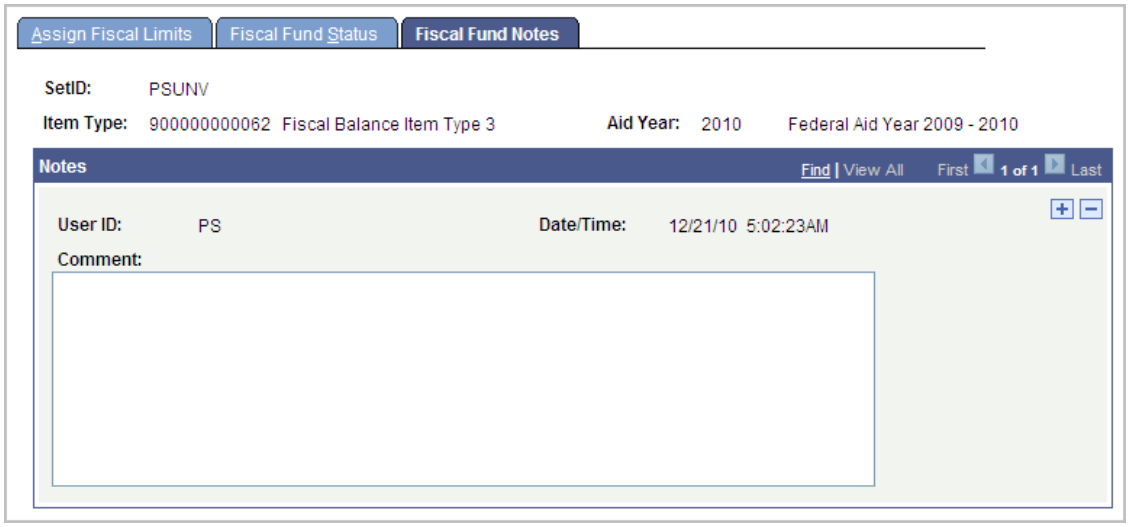
Field or Control	Description
Cancelled Amount	Displays the sum of the awards of this financial aid item type that have been cancelled.
Cancelled Count	Displays the number of students that have cancelled awards of this financial aid item type.
Declined Amount	Displays the sum of the awards of this financial aid item type that have been declined.
Declined Count	Displays the number of students that have declined awards of this financial aid item type.

Reviewing Fiscal Fund Notes

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

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

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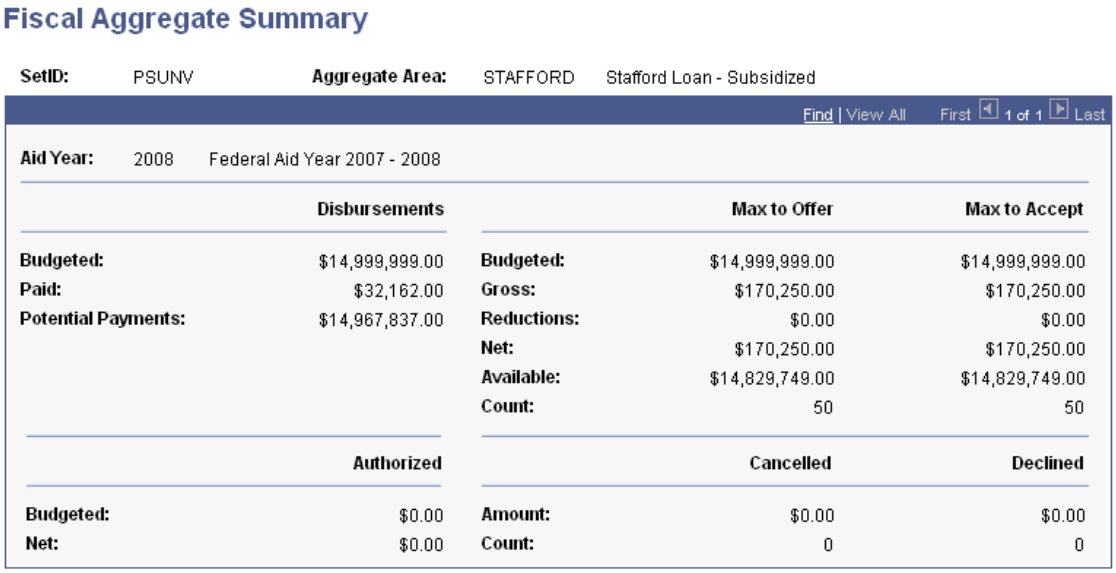


Enter comments regarding a fund for informational use by your financial aid staff.

Reviewing Fiscal Limits for Aggregate Areas

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

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



Field or Control	Description
Budgeted – Authorized	The maximum source of funding that can be authorized for this aggregate area.

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

Packaging for Pell Grant Eligibility

This section discusses how to:

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

Pages Used to Package for Pell Grant Eligibility

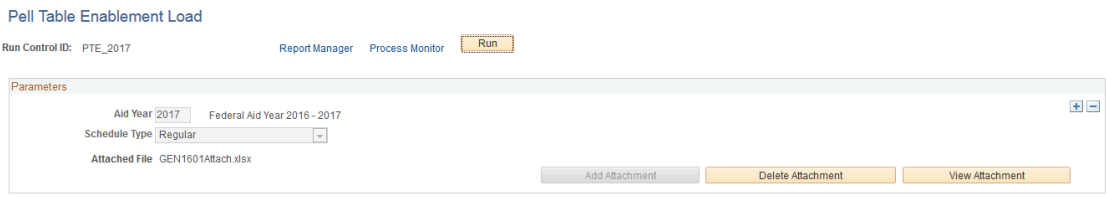
Page Name	Definition Name	Navigation	Usage
Pell Table Enablement Load Run Control	SFA_PELL_SCH	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Pell Table Load**	Import Federal Pell Grant (Regular and Alternate) Payment and Disbursement Schedules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

Loading Pell Schedules into Pell Table Enablement Tables

Navigation:

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

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



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Field or Control	Description
Aid Year	Select the Aid Year for which to load the Department of Education's published Pell Grant Payment and Disbursement Schedules into the system.
Schedule Type	Select the schedule type. *Regular*: Regular Pell Grant Payment and Disbursement schedules. *Alternate*: Career Pathway Alternate Pell Grant Payment and Disbursement schedules.
Attachment	Use the standard Add, Delete, and View Attachment buttons to upload, delete, or view the *.xlsx file's corresponding Pell Schedule. Attach only MS Excel (*.xlsx) versions of Federal Pell Grant Payment and Disbursement Schedules for loading to the Pell Table Enablement tables: SFA_PELL_SCHED (regular schedules) and SFA_PELL_ALT (alternate schedules). PDF formats are not supported.

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

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

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

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

Comparing Published Pell Schedules with Existing Pell Table Data

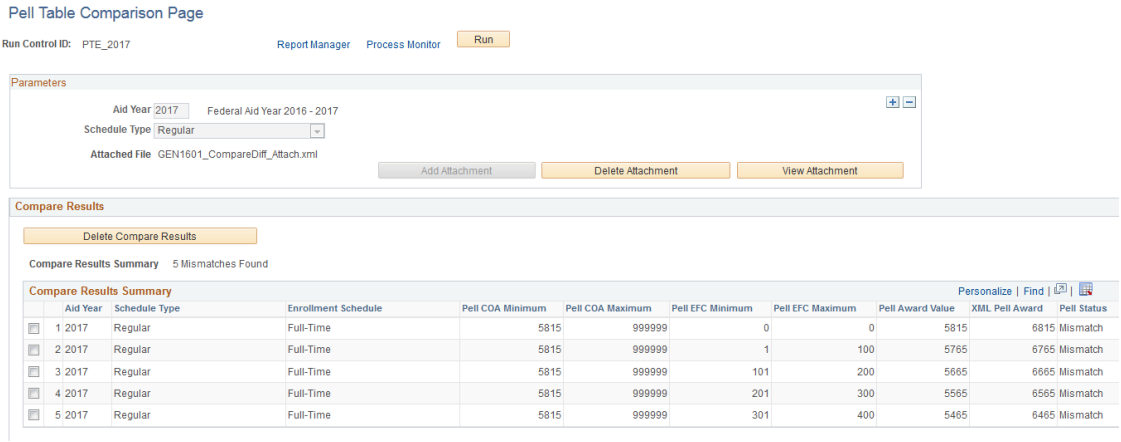
Use this comparison routine to compare the published schedules against existing system data, review the results for any mismatches, and update the system tables with the source schedules, if needed. If neither the schedules nor the PTE tables have been altered, these values should always match.

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Navigation:

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

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



Field or Control	Description
Aid Year	Select the Aid Year for which to perform a comparison of the Department of Education's published Federal Pell Grant Payment and Disbursement Schedules against the system's existing PTE data.
Schedule Type	Select the schedule type. *Regular*: Regular Pell Grant Payment and Disbursement schedules. *Alternate*: Career Pathway Alternate Pell Grant Payment and Disbursement schedules.
Attachment	To perform a comparison, first save a copy of the spreadsheet as an XML file type in MS Excel. Use the standard Add, Delete, and View Attachment buttons to upload, delete, or view the (converted) XML file's corresponding Pell Schedule. **Note:** Ensure that the file name of the uploaded corresponding XML schedule is limited to 64 characters.
Delete Results	Select this button to clear out the Compare Results window.
Compare Results Summary	Identify the number of mismatches (up to 300) found during the comparison between the attached schedule and PTE table.
Update Selected	Select this button to update the system tables for selected mismatched rows.

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Field or Control	Description
Update All	Select this button to update the system tables for all of the identified mismatched rows. If there are more than 300 mismatches, you are prompted to reload the corresponding Pell Schedule using the Pell Table Enablement Load Run Control.

Preparing for Early Financial Aid Offers

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

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

Understanding Early Financial Aid Offers

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

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

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

Page Used to Prepare for Early Financial Aid Offers

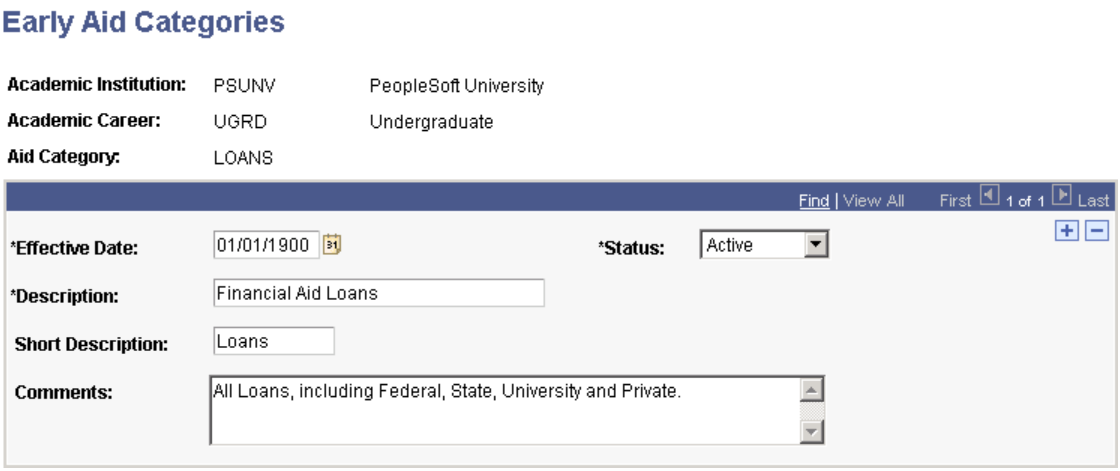
Page Name	Definition Name	Navigation	Usage
Early Aid Categories	ERLY_FA_CTG_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Early Financial Aid Categories**, and then **Early Aid Categories**	Set up early financial aid offer categories.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

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Setting Up Early Financial Aid Offer Categories

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

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



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

Setting Up Restricted Aid

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

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

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

Related Topics

- Recruiting and Admissions: Setting up Applicant Evaluation
- Recruiting and Admissions: Setting Up Student Response

Understanding Restricted Aid

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

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

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

See Campus Community Fundamentals: Understanding Organization Data

See Campus Community Fundamentals: Creating Committees and Campus Community Fundamentals: Assigning Committee Members.

Pages Used to Set Up Restricted Aid

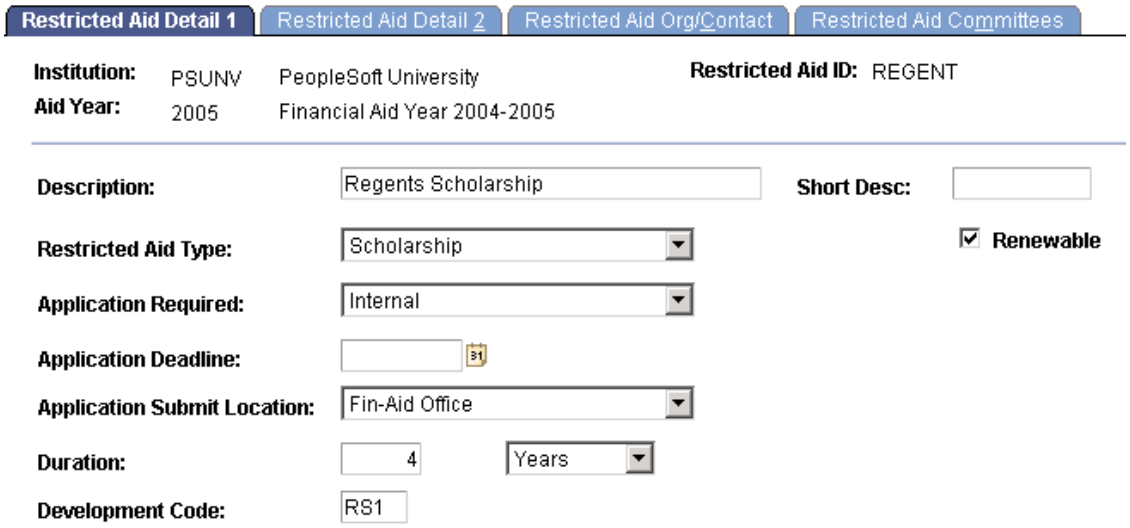
Page Name	Definition Name	Navigation	Usage
Restricted Aid Detail 1	RSTRC_AID1	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Restricted Aid Table**, and then **Restricted Aid Detail 1**	Define basic information about the restricted aid award,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

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Defining Restricted Aid Basic Information

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

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



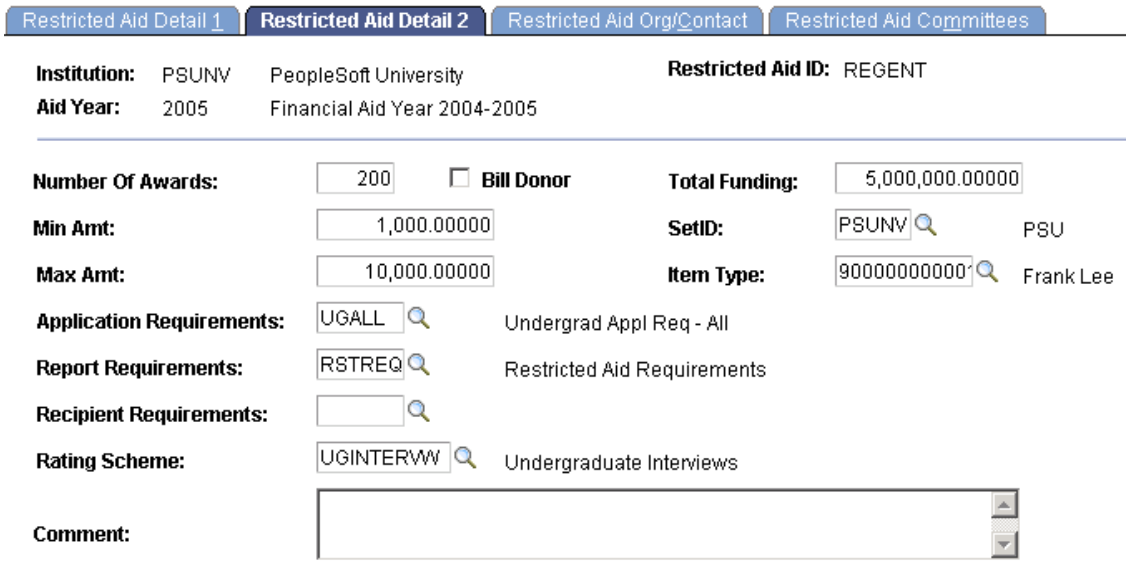
Field or Control	Description
Restricted Aid Type	Identify the restricted aid as a fellowship or scholarship.
Renewable	Select if the restricted aid is a renewable aid source.
Application Required	Select whether an application is required, and if so, what kind of application. You can select *External*, *Internal*, or *No App* (no application).
Application Deadline and **Application Submit Location**	If an application is required, enter the date it must be turned in and where to submit it.
Duration	Enter a numeric value for the duration of the restricted aid type and then indicate in the adjacent field whether this is *Days*, *Months*, *Terms*, or *Years*.
Development Code	Enter a code of up to four alphanumeric characters. The development code is institution-specific and assists with institutional reporting needs.

Defining Award Limits and Requirements

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

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



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

Related Topics

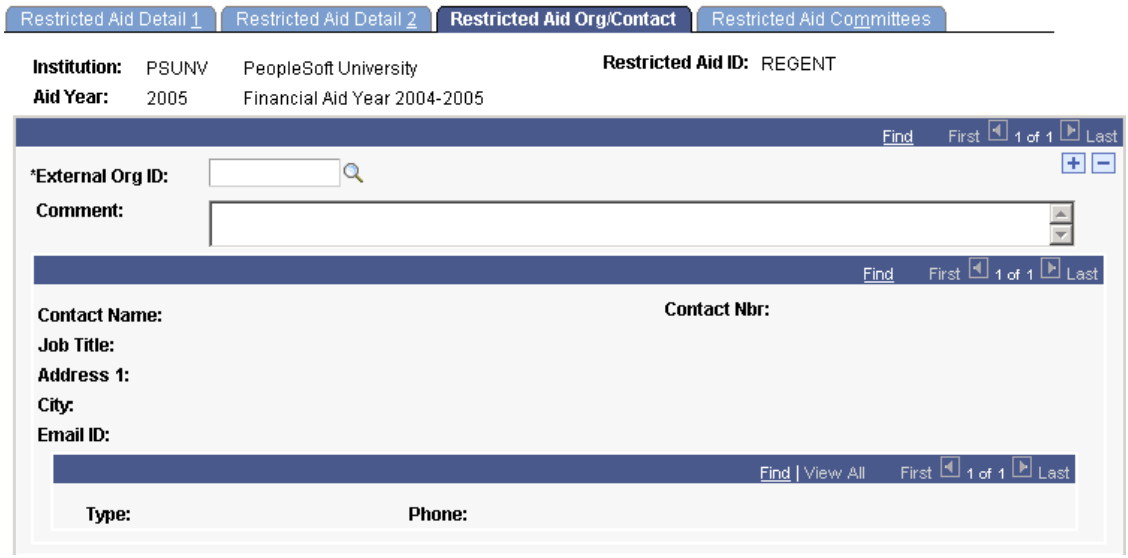
- Campus Community Fundamentals: Understanding Checklists

Attaching an External Organization

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

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



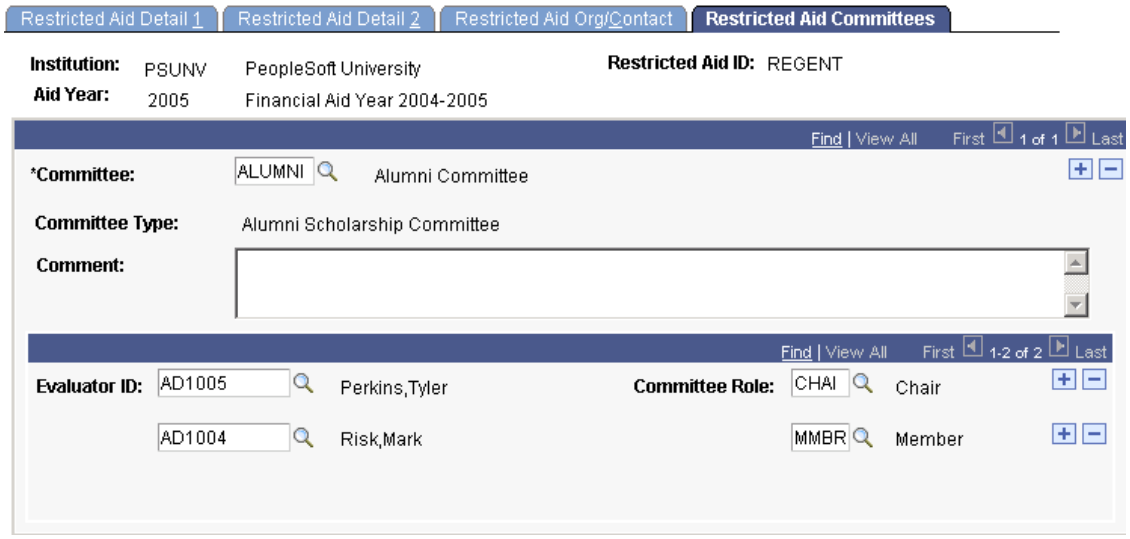
Field or Control	Description
External Org ID (external organization ID)	Select the organization ID that represents the organization associated with this restricted aid type. To view any additional organizations associated with this restricted aid type, use the scroll arrows.
Comment	Displays an explanation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

Assigning a Committee

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

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

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

Related Topics

- Campus Community Fundamentals: Understanding Committee Templates
- Campus Community Fundamentals: Creating Committees
- Campus Community Fundamentals: Assigning Committee Members

Setting Up Award Adjustment Reasons

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

Award adjustment reasons are institutionally defined reasons indicating why an award may be adjusted. Award adjustment reasons can be used for clarification when modifying an award and also for statistical tracking purposes. You can enter an award adjustment reason any time that you change an award on the award entry pages, but award adjustment reasons are required on the Professional Judgement page. Some sample award adjustment reasons come pre-delivered with Financial Aid, but you can modify, add, and delete these.

This section discusses how to create award adjustment reasons.

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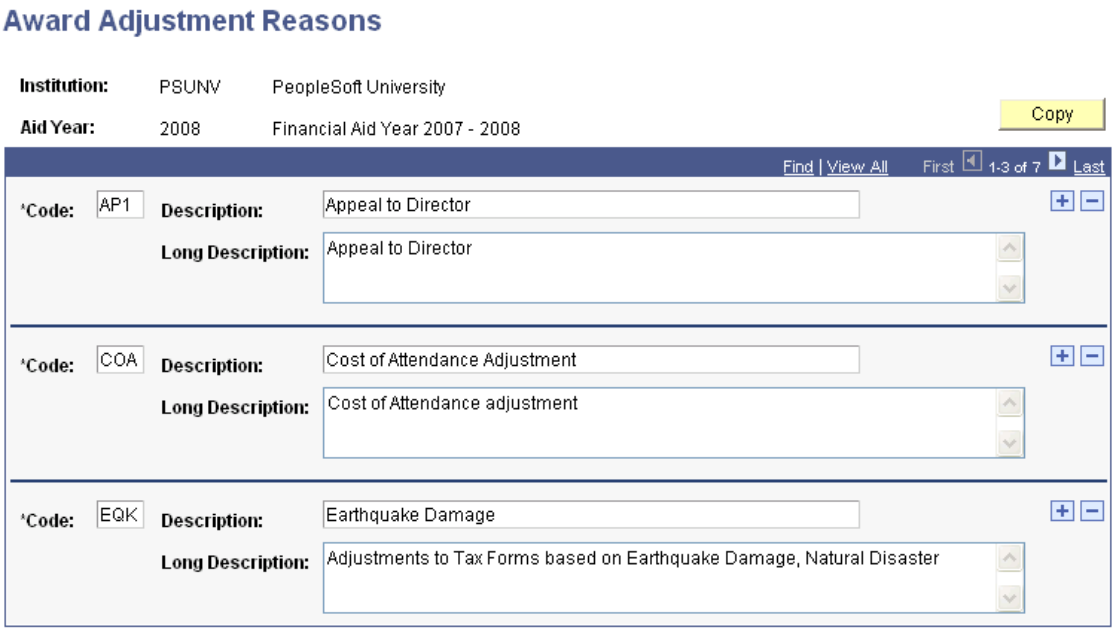
Pages Used to Set Up Award Adjustment Reasons

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

Creating Award Adjustment Reasons

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

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



Field or Control	Description
Code	Enter a three-character code that represents the award adjustment reason.

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6

Setting Up External Awards

Understanding External Awards

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

This section discusses:

- Types of external award data.
- Data sources and methods to obtain external awards.
- Data flow of external awards to student award tables.
- Special consideration for Student Financial payments.
- Awarding Loan Certifications as external awards.

Types of External Award Data

In most instances, external awards are already determined for a student by an external entity. However, information about a student's external award must be accounted for and posted to a student's award package to determine the effect on a student's total financial aid package and financial need.

External award or resource data can originate from various sources:

- State agencies providing data on state grant awards.
- Internal academic departments providing data on departmental scholarship awards.
- Students directly providing information about outside or private scholarship and grant awards.
- Student financial department providing payment transactions that have already been acknowledged on a student's (SF) account, such as waivers or third-party contract payments.

Data Sources and Methods to Obtain External Awards

External award or resource data can be communicated to the financial aid office in various formats and methods:

- Data files, such as state grant roster files or internal departmental scholarship files.

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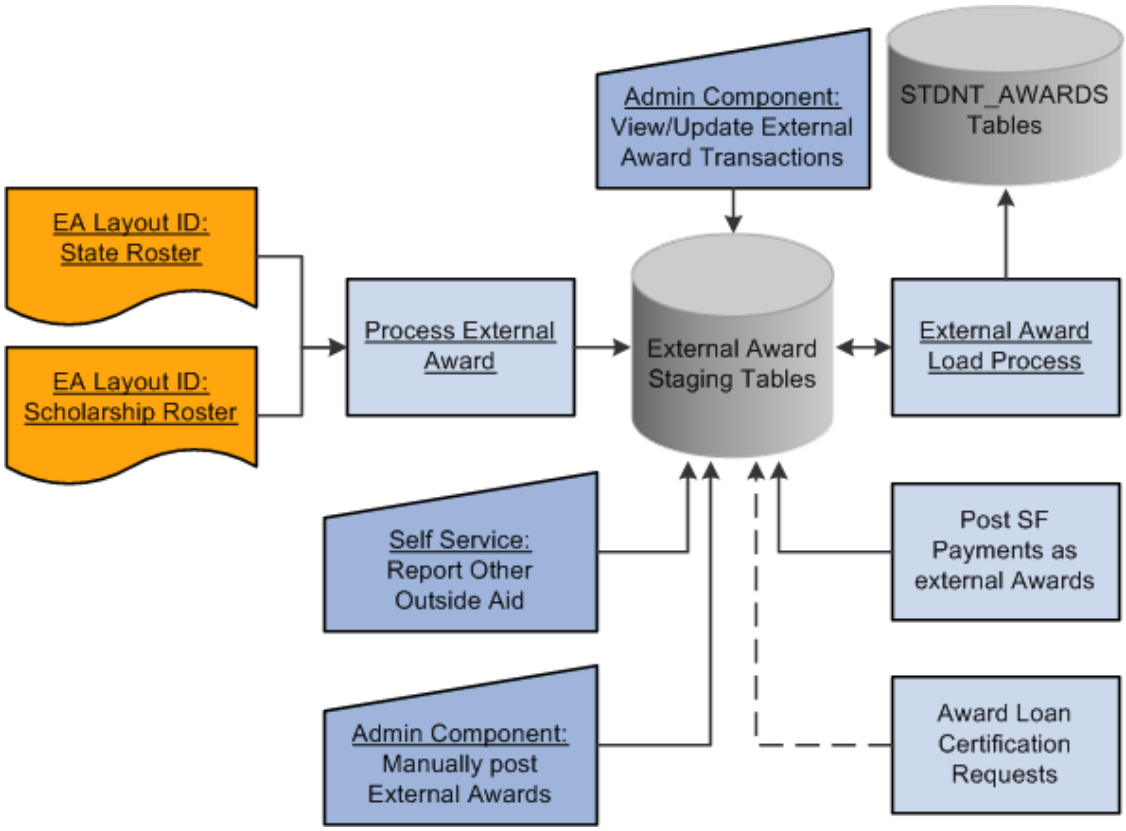
- Manual data entry required when a student submits paper financial aid notifications that indicate outside or private scholarship awards.
- Entries from students who enter outside or private scholarships and grants in Self Service.
- Data included in other nonfinancial aid specific records, such as waiver and third-party contract payments already posted to a student's (SF) account.
- School Loan Certification Requests, which differ from all other external awards. The borrower applies for a loan directly with the servicer and the servicer requests that the school certify the borrower's eligibility.

External award data processing is built around a core set of External Award Staging records that maintain the external award transaction data. Every external award transaction entered is keyed with a set of transaction key values and provided a processing status as it relates to the loading of that transaction into the student award records.

Data Flow of External Awards to Student Award Tables

The following diagram shows a high-level flow of data.

Data flow of external awards to student award tables



Various data sources update the core set of External Award staging tables. After external award data or transactions update the staging tables, a separate External Award Load process is run to determine whether and how the external award data is to update the student award tables. The result of the External Award Load process updates the processing status field maintained for each external award transaction.

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Special Consideration for Student Financial Payments

The Student Financial and Financial Aid teams need to determine which payments to represent on a student's award package. Then use the External Award process to acknowledge payments, waivers, and third-party credits that have already been posted to a student account. Payments posted to a student account can be defined as a one-to-one mapping to a (Financial Aid) item type or a many-to-one relationship.

To set up the mapping, complete the external award attribute setup. Then update the External Award tab on the (Student Financial) Item Type setup table. Run a separate SF External Award process to capture and assess mapped payments and credits to a financial aid item type. The SF External Award process creates external award transactions in the External Award Staging tables.

Awarding Loan Certifications as External Awards

The outcome of the External Award process updates award data in a student award package. A school loan certification request can become a candidate for a type of external award. The External Award process has options to identify the potential awarding of a loan certification request. School loan certifications are the only type of external award that is evaluated for federal need eligibility, based on the type of loan certification request.

Federal Stafford loan certification uses the Related Item Type setup to identify the subsidized and unsubsidized Stafford financial aid item types. The Stafford Loan Certification Awarding process evaluates the student's current federal need and posts the appropriate subsidized and unsubsidized award combination. If the student does not demonstrate need, the process returns an error message that the student is not eligible.

Parent Loan for Undergraduate Students (PLUS) and Alternative school loan certification requests require a single financial aid item type.

> **Note**
>
> Use this option only if your school incorporates the processing of school loan certification request applications in Commonline version 4 (CL4) or Common Record CommonLine (CRC.) Awarding loan certification requests as an external award accomplishes the awarding step within the loan certification process for CL4 or CRC.

Setting Up External Award Processing

This section discusses how to:

- Define external award types.
- Define external award sources.
- Cross-reference external award attributes to financial aid item types.

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Pages Used to Set Up External Award Processing

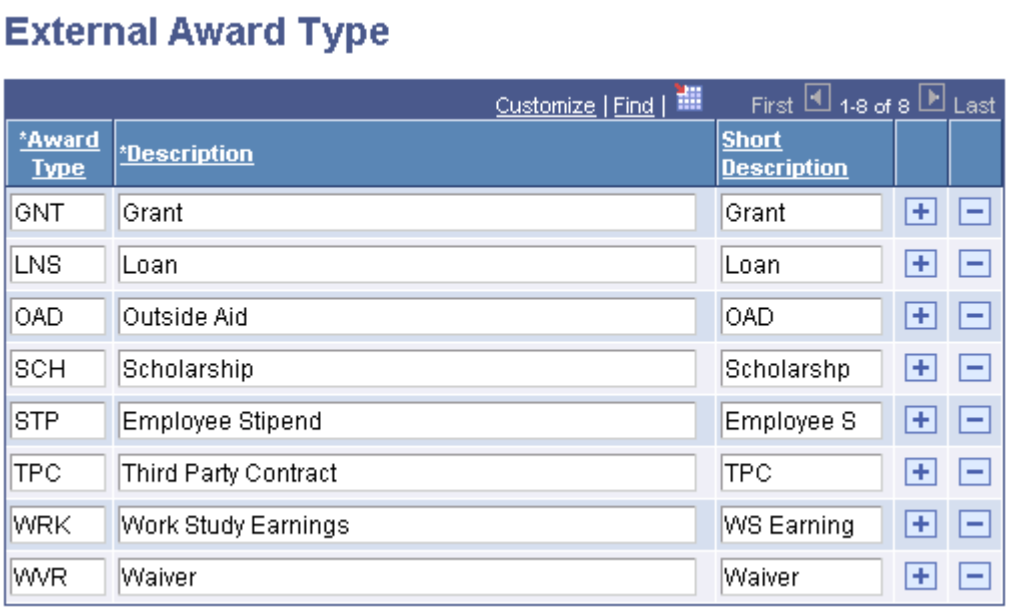
Page Name	Definition Name	Navigation	Usage
External Award Type	SFA_EA_TYPE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Define External Award Types**, and then **External Award Type**	Define external award types.
External Award Source	SFA_EA_SOURCE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Define External Award Sources**, and then **External Award Source**	Define external award sources.
External Award Cross Reference	SFA_EA_TYPE_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Item Type Cross Reference**, and then **External Award Cross Reference**	Cross-reference external award attributes to financial aid item types. Use if a financial aid item type is not defined on an external award transaction. Use cross-reference setup to map Student Financial payments to a financial aid item type award.

Defining External Award Types

Access the External Award Type page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Define External Award Types**, and then **External Award Type**).

This example illustrates the fields and controls on the External Award Type page.

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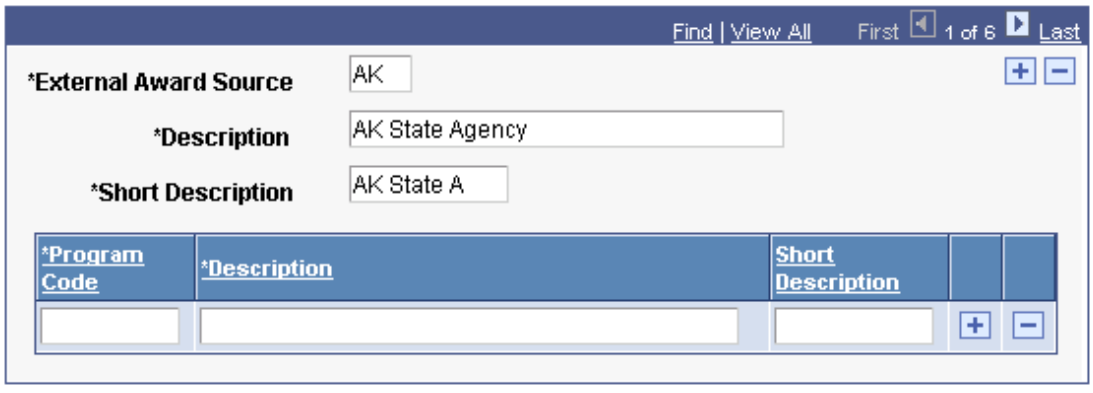


The external award type is a high-level description of the type of external award to be processed. External award type is completely user-defined. Definitions help with categorizing and reporting external award data collected.

Defining External Award Sources

Access the External Award Source page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Define External Award Sources**, and then **External Award Source**).

This example illustrates the fields and controls on the External Award Source page.



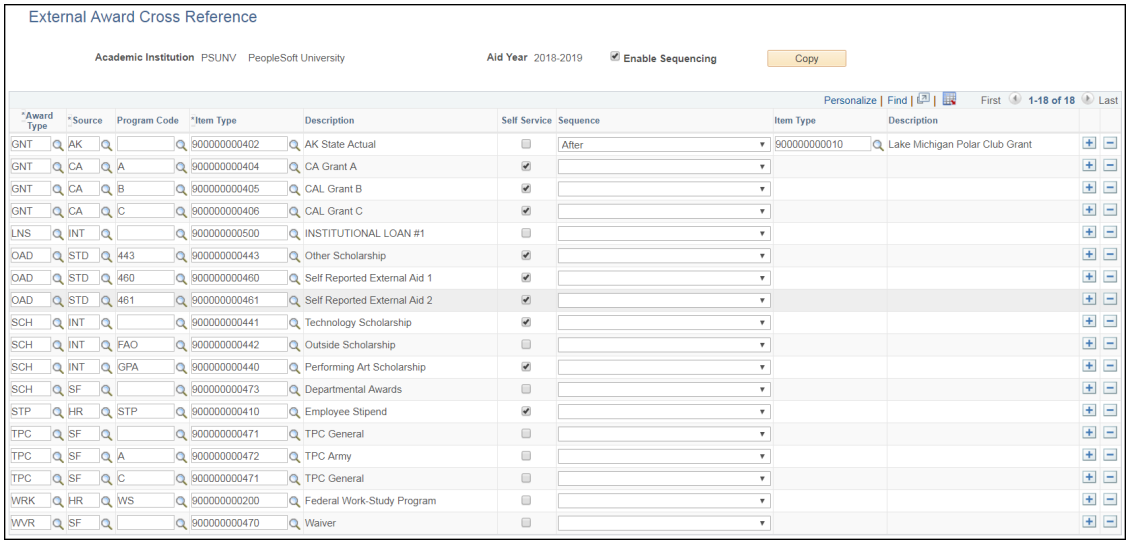
Use this page to define the sources of external awards, such as your state, other departments at your institution, your Human Resources department, Student Financials, or a general category of student-reported awards. A unique program code can be further defined within an external award source code. These attributes are completely user-defined. Use the definitions to categorize and report collected external award data.

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Cross-Referencing External Award Attributes to Financial Aid Item Types

Access the External Award Cross Reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Item Type Cross Reference**, and then **External Award Cross Reference**).

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



External Award Cross Reference

Academic Institution PSUNV PeopleSoft University Aid Year 2018-2019 Enable Sequencing Copy

Personalize | Find | First 1-18 of 18 Last

*Award Type	*Source	Program Code	*Item Type	Description	Self Service	Sequence	Item Type	Description
GNT	AK		900000000402	AK State Actual	☐	After	900000000010	Lake Michigan Polar Club Grant
GNT	CA	A	900000000404	CA Grant A	☑			
GNT	CA	B	900000000405	CAL Grant B	☑			
GNT	CA	C	900000000406	CAL Grant C	☑			
LNS	INT		900000000500	INSTITUTIONAL LOAN #1	☐			
OAD	STD	443	900000000443	Other Scholarship	☑			
OAD	STD	460	900000000460	Self Reported External Aid 1	☑			
OAD	STD	461	900000000461	Self Reported External Aid 2	☑			
SCH	INT		900000000441	Technology Scholarship	☑			
SCH	INT	FAO	900000000442	Outside Scholarship	☐			
SCH	INT	GPA	900000000440	Performing Art Scholarship	☑			
SCH	SF		900000000473	Departmental Awards	☐			
STP	HR	STP	900000000410	Employee Stipend	☑			
TPC	SF		900000000471	TPC General	☐			
TPC	SF	A	900000000472	TPC Army	☐			
TPC	SF	C	900000000471	TPC General	☐			
WRK	HR	WS	900000000200	Federal Work-Study Program	☐			
WVR	SF		900000000470	Waiver	☐			

Use this page to map **Type** and **Source** values that you entered on the External Award Type page and the External Award Source page to an existing financial aid item type. You can map many external awards with similar attributes to the same financial aid item type. For example, a school can combine several outside scholarship programs in a single financial aid item type. The external award attributes may differ, but all map to the same financial aid item type.

> **Note**
>
> If mapping many to one financial aid **Item Type**, ensure that the reporting code is *Append.* This ensures that the financial aid **Item Type** award represents a comprehensive total.

Use the **Enable Sequencing** option on this page for more control over *where* in a student's financial aid package incoming external awards should be inserted. When you enable sequencing, a **Sequence** column, a *second* **Item Type** column, and a *second* Item Type **Description** column are revealed in the grid. If External Award Sequencing is not enabled, incoming external awards are sequenced above existing awards; except for Loan Certifications, which are sequenced below all awards.

The Student Financial External Awards process uses the cross-reference mapping and external award attributes mapped on the Student Financial item type setup to determine which (SF) payments to process and report as external award transactions.

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Field or Control	Description
Enable Sequencing	Select this check box to enable the Sequence and second Item Type columns which allow you to select the desired sequence for each incoming external award item type.
Award Type	Select an award type that you entered on the External Award Type page.
Source	Select an award source that you entered on the External Award Source page.
Program Code	Use depending on the granularity of detail that you need in order to map an external award to a financial aid item type. Select an award source program code that you entered on the External Award Source setup page.
Item Type	Select the external award financial aid **Item Type** (in the first Item Type column in the grid, directly after the **Program Code** column) to associate with this row's type and source combination. Different combinations of external award attributes can be mapped to the same **Item Type**. For example, you could categorize several outside scholarships with their own combination of type, source, and program code. However, each combination would map to a single **Item Type** for award posting. **Note:** If you are mapping several attribute combinations to a single **Item Type**, each external award transaction must have a reporting code of *Append* to ensure that the correct added amount is posted.
Self Service	Select the check box for each row of information that should appear for the student on the Report Aid from Other Sources Self Service pages. In Self Service, students can then select the award type from a drop-down list box. If an award does not appear in a drop-down list box, the student can enter the award in free form. See Campus Self Service: Understanding Campus Self Service for Financial Aid.

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Field or Control	Description
Sequence	Select where in the student's package the external award **Item Type** should be inserted: • *(blank) - default*: If no sequence is defined, the external award **Item Type** is inserted into the last position (highest sequence number). • *First*: The external award **Item Type** is inserted into the first position (lowest sequence number). • *Last*: The external award **Item Type** is inserted into the last position (highest sequence number). • *Before*: The external award **Item Type** is inserted *before* the **Item Type** specified in the second Item Type column. – If there is no **Item Type** specified in the second Item Type column *or* if the **Item Type** specified in the second Item Type column is not found in the student's package, the external award **Item Type** is inserted after Need Based awards. – If there are no Need Based awards found in the student's package, the external award **Item Type** is inserted into the first position (lowest sequence number). • *After*: The external award **Item Type** is inserted *after* the **Item Type** specified in the second Item Type column. – If there is no **Item Type** specified in the second Item Type column *or* if the **Item Type** specified in the second Item Type column is not found in the student's package, the external award **Item Type** is inserted after Need Based awards. – If there are no Need Based awards found in the student's package, the external award **Item Type** is inserted into the last position (highest sequence number). • *After Need Based*: The external award **Item Type** is inserted after Need Based awards. If there are no Need Based awards found in the student's package, the external award **Item Type** is inserted into the first position (lowest sequence number). Need-based awards are defined by a Straight Need/Cost value in the Meet Need/Cost field on the FA Item Type 2 setup page. See Setting Up Financial Aid Item Type Awarding Rules.

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Field or Control	Description
Item Type	In this second Item Type column, select the **Item Type** before or after which the external award **Item Type** should be inserted. This field is only enabled when *Before* or *After* is selected in the **Sequence** column.
Description	Displays the description of the **Item Type** specified in the second Item Type column.

Defining Search and Match Criteria

This section discusses how to define search and match criteria for the External Award Load process.

Page Used to Define Search and Match Criteria

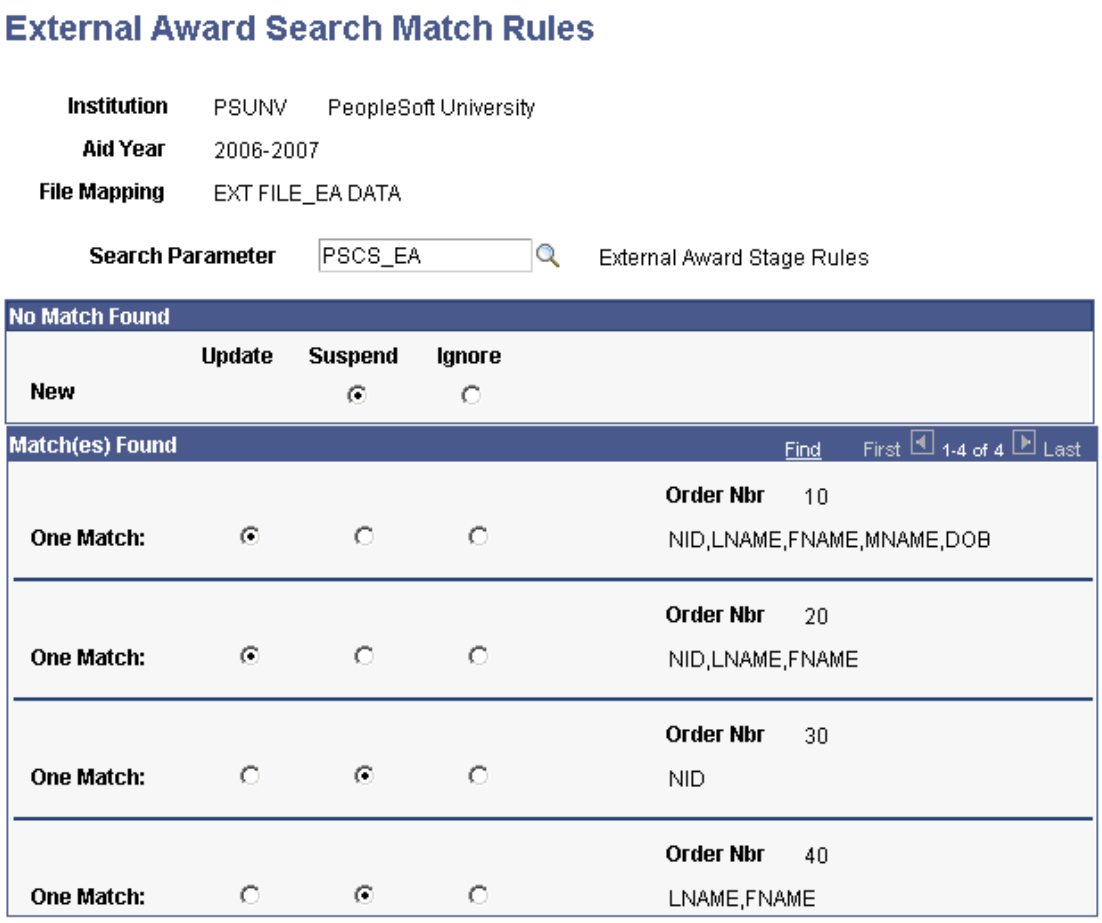
Page Name	Definition Name	Navigation	Usage
External Award Search Match Rules	SFA_EA_SRCH_MATCH	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Search Match Rules**, and then **External Award Search/Match Rules**	Define search and match criteria for use by the External Award Load process.

Defining Search and Match Criteria for the External Award Load Process

Access the External Award Search Match Rules page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **External Awards**, and then **Search Match Rules**, and then **External Award Search/Match Rules**).

This example illustrates the fields and controls on the External Award Search Match Rules page. You can find definitions for the fields and controls later on this page.

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The External Award Stage process uses the Search/Match utility when running the External Load for an external file. You create your own search/match rules and search/match parameters for each File Mapping definition. The process determines whether an existing ID matches a transaction identified within an external award data file. Each external award data file must be related to a File Mapping definition defined within the File Parser utility.

The following table lists the search fields specific to External Award Stage processing that are relevant when you are defining search/match rules.

External Award Stage Fields	Search Rule	Search Field
National ID	NationalIDRule	NATIONAL_ID
Last Name	LastNameSrchRule	LAST_NAME_SRCH
First Name	FirstNameSrchRule	FIRST_NAME_SRCH
Date of Birth	DateOfBirthRule	BIRTHDATE
Middle Name	MiddleNameRule	MIDDLE_NAME

Field or Control	Description
No Match Found	Select *Suspend* or *Ignore* as the action for the External Award Load process to take when no match is found.

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Field or Control	Description
Match(es) Found	Starting from the lowest search order, select *Update, Suspend,* or *Ignore* as the action for the External Award Load process to take when a match is found. In this example, 10 is the lowest and most restrictive search rule.

Related Topics

- Campus Community Fundamentals: Setting Up Search/Match

Planning for File Parser and External Award Processing

Use the File Parser utility to map external award data files and convert data to the External Award staging tables. The delivered External Award context definition defines the target External Award staging tables, fields, and mapping action. Use this section to determine how to create File Parser mapping definitions for external award processing.

This section discusses how to:

- Use the context definition.
- Use the file mapping definition.
- Review the External Award staging tables.

Using the Context Definition

The context definition identifies the target table that the File Parser populates with external data. A context definition identifies the hierarchy of the target record structure and fields available to be mapped and updated. Your Campus Solution database is provided with the context definition for the External Award process. The External Award context definition contains the External Award Stage records and fields, which are the target records for mapping any external data file for the External Award process. Do not change any record or fields defined in the External Award context definition unless you need to reduce the number of fields that are visible for mapping.

Using the File Mapping Definition

Use the File Mapping Definition component to map and define a data file to be converted to target staging tables. The key element in a File Mapping definition is the context definition to be referenced. After you identify the context definition, identify the external data file layout. The external fields are then mapped to the available target records and fields.

Use the File Definition tab to identify the context definition and general attributes of the data file to be processed. Use the External Award Load context definition for external files that contain data that you want to convert and update the external award staging tables. If your external file has multiple row types, then only identify the row types that have data that you want to convert.

Use the File Layout tab to identify the external file fields and format.

Use the Mapping tab to define how the target staging table and fields are updated when the external file is processed. For example, your external file probably contains a field comparable to the required SFA_EA_REPORT_CD field on the staging table record SFA_EASTAGE_DTL. On the Mapping tab for this field, set the **Mapping Action** field to *Default Value* and enter

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A=Append, R=Replace, or *N=New.* When the external file is processed, the SFA_EA_REPORT_CD field is then populated with that value.

Reviewing the External Award Staging Tables

The record layout and field definitions describe the External Award staging tables. The layout also identifies which fields are visible for mapping in the File Parser Mapping Definition component. The four records are:

- SFA_EASTAGE_HDR: The header record, which contains the highest keys.
- SFA_EASTAGE_DTL: The award details at an annual award level.
- SFA_EASTAGE_DSB: Award disbursement details.
- SFA_EASTAGE_CNT: Summary counter and amounts.

External Award Stage Header Record and Fields

This is the parent record to the SFA_EASTAGE_DTL and SFA_ESTAGE_DSB records.

Field Name	Description	Visible for Mapping	Comment
SFA_EA_TRANS_NBR	Transaction number		Key assigned by the system.
TRANSACTION_DATE	Transaction date		Assigned by the File Staging process.
PROCESS_INSTANCE	Process instance		
SFA_EA_TRANS_SRCE	Transaction source		Assigned by the system. 01 = Manual Entry, 02 = External Data file, 03 = Loan Certification file (not currently used), 04 = Student Financials Feed, 05 = Self Service.
OPRID	User ID		Assigned by the File Staging process.
SCCFP_MAP_ID	File mapping ID		Assigned by the system.
FILENAME	File name		Assigned by the File Staging process.
CPS_SCHOOL_CODE	School code	Yes	Not currently used. Context Definition is Visible for Mapping.
SFA_EA_STDNT_COUNT	Transaction student count		Field exists on the SFA_EASTAGE_CNT record. If mapped, the field is used to capture source transaction student count.
SFA_EA_AWARD_TOTAL	Transaction award total		Field exists on the SFA_EASTAGE_CNT record. If mapped, the field is used to capture source transaction award total.

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Field Name	Description	Visible for Mapping	Comment
SFA_EA_RSLT_COUNT	Actual count		Number of row counts in SFA_EASTAGE_DTL when source is external file.
SFA_EA_RSLT_TOTAL	Actual total		Sum of awards in SFA_EASTAGE_DT, when source is external file.
SFA_EA_FILE_STATUS	File read status		Assigned by the File Staging process.
PKG_STATUS_CD	Packaging status		Error number. Assigned by File Staging process.

External Award Stage Detail Record and Fields

This is the child record to the SFA_EASTAGE_HDR record.

Field Name	Description	Visible for Mapping	Comment
SFA_EA_TRANS_NBR	Transaction number		Key assigned by the system
SFA_EA_SEQNO	Sequence number		Key assigned by the system
NATIONAL_ID	National ID	Yes	Available as a Search/ Match element. If EMPLID is provided, the Search/Match routine is bypassed.
BIRTHDATE	Date of birth	Yes	Available as a Search/ Match element. If EMPLID is provided, the Search/Match routine is bypassed.
LAST_NAME	Last name	Yes	Available as a Search/ Match element. If EMPLID is provided, the Search/Match routine is bypassed.
FIRST_NAME	First name	Yes	Available as a Search/ Match element. If EMPLID is provided, the Search/Match routine is bypassed
MIDDLE_NAME	Middle name	Yes	Available as a Search/ Match element. If EMPLID is provided, the Search/Match routine is bypassed.

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Field Name	Description	Visible for Mapping	Comment
EMPLID	Employee ID	Yes	If EMPLID is provided, then Search/Match parameters are bypassed during the External Award Load process.
INSTITUTION	Academic Institution		
AID_YEAR	Aid Year		
ACAD_CAREER	Academic Career	Yes	(Optional) The External Award Load process uses an active career, as determined from the FA Term record for the student ID. If the student has multiple careers within one aid year, the External Award Load process errors out with a message indicating that the student has more than one active career. If you are running the External Award Load process from batch, you can allow the External Award Load process to post an external award transaction to the first active career found.

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Field Name	Description	Visible for Mapping	Comment
SFA_EA_PROC_STAT	Processing Status		The processing status of the External Award transaction: • *Unprocessed:* All transactions start with this value except student-reported aid (Self Service). • *Processed:* Indicates a successful External Award Load. • *Error:* • *Adjusted:* Assigned as a result of Multi-Career batch option, Term Mismatch batch option, or a reduction by the Engine (in the case of a loan certification request). • *Duplicate:* Assigned during EA Load. If the reporting code is New and the student's award package already has Financial Aid Item Type posted, the External Award Load process returns Duplicate. The status can also be changed manually to Duplicate. • *Suspend:* Based on the Search/Match option. • *Skip:* Based on the Search/Match option, Multi-Career batch option, or Term Mismatch batch option. • *In Progress:* Assigned to transactions selection for a particular External Award Load

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Field Name	Description	Visible for Mapping	Comment
			process. Thus, if the program terminates during processing, batch transactions remain at this status. Change the value manually for the batch to be selected again by the External Award Load process. • *Reported:* Assigned to all new External Awards with data source of *Self Service.*
SFA_EA_PROC_DTTM	Date/Time Processed		
SFA_EA_EA_TYPE	External Award Type	Yes	(Optional) If no financial aid item type is provided, then external award attributes of Type, Source, or Program code are reviewed against External Award Cross-Reference item type setup.
SFA_EA_SOURCE	External Award Source	Yes	(Optional) If no financial aid item type is provided, then external award attributes of Type, Source, or Program code are reviewed against External Award Cross-Reference item Type setup.
SFA_EA_PROGRAM_CD	External Award Program Code	Yes	(Optional)
SFA_EA_LOAN_CERT	Loan Certification	Yes	(Optional) Indicates external award data is based on a Loan Certification Request. If yes, then a corresponding Related Item Type Group or Item Type value must be identified. If yes, Reporting Code becomes New by default. See Awarding Loan Certifications as External Awards.

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Field Name	Description	Visible for Mapping	Comment
SFA_EA_REPORT_CD	Reporting Code	Yes	(Required) Determines how transaction data is posted to a student's award package: • *New:* If item type to be posted already exists, the External Award Load process sets the transaction to Error. This is used ideally for external awards reported once each aid year. • *Replace:* The default value when you are entering transactions manually. Use this value to change existing annual and disbursement details of an award. If item type to be posted does not already exist, the External Award Load process treats transaction as if **Reporting Code** value were *New.* Be careful when using the Replace value and providing only term amount details. See NET_AWARD_AMT field to understand how field amount is determined. • *Append:* Use this value to add an amount to an existing award. Append transactions can increase the annual award amounts for specific disbursement IDs. If item type to be posted does not already exist, the

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Field Name	Description	Visible for Mapping	Comment
			External Award Load process treats the transaction as if Reporting Code is *New*.
ITEM_TYPE	Item Type	Yes	If this field is blank, the External Award Load process uses the External Award Item Type Cross Reference setup to determine the item type to be added or updated.
REL_ITEM_TYPE	Related Item Group	Yes	Available only when Loan Certification equals Yes. This value is intended to determine Stafford eligibility. The Related Item Type group should identify both Subsidized and Unsubsidized Stafford item types. See Awarding Loan Certifications as External Awards.
DESCR	Description	Yes	(Optional) Enter a 30-character award description. The description is displayed in Self Service.

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Field Name	Description	Visible for Mapping	Comment
DISBURSEMENT_PLAN	Disbursement Plan	Yes	(Optional) If provided, the disbursement plan (DP) is used. If the disbursement plan is not provided, the default DP from the item type's career default DP/Split Code (SC) is used. If no default DP/SC is defined for career, a DP/SC is used from the student's term enrollment. If a DP/SC is not found, External Award Load errors out the transaction. For Replace/Append transactions, this must be the same value used on the posted (noncanceled) award. A Split code does not need to be provided if a Disbursement Plan code exists. Providing only a Disbursement Plan code allows the External Award Load process to establish the term disbursement structure and define the specific distribution based on amounts provided in transaction.
SPLIT_CODE	Split Code	Yes	(Optional) If provided, this split code is used to determine the disbursement split formula. Split code is set to XX if disbursement data is provided on the External Award transaction.

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Field Name	Description	Visible for Mapping	Comment
NET_AWARD_AMT	Net Award Amount	Yes	(Optional) The annual amount to be posted. If scheduled disbursement amounts are provided, the cumulative scheduled disbursement amounts must equal the net award amount. If this field is blank, and scheduled disbursement detail is provided, then the net award amount is assigned the sum of scheduled disbursement amounts.
DISBURSED_AMOUNT	Disbursed Amount	Yes	(Optional) The total disbursed amount to be posted. If disbursement detail amounts are provided, the cumulative amounts must equal the disbursed amount. If this field is blank and disbursement detail is provided, then disbursed amount is assigned the sum of the disbursement detail amounts. **Note:** The disbursed amount on the posted award is updated only when the disburse method for the item type is *No*.
SFA_EA_PAY_STATUS	Paid Status	Yes	(Optional) Indicates that the annual amount has been fully paid to the student. If you select *Yes*, the annual disbursed amount is equal to the net award amount. **Note:** The disbursed amount on the posted award is updated only when the Disburse method for the item type is *No*.

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Field Name	Description	Visible for Mapping	Comment
SFA_EA_ADJ_REASON	Adjustment Reason	Yes	(Optional) Use this 3-character field to capture additional information. Any data mapped to this field is visible when you are viewing external award transaction data.
SFA_EA_INELIGIBLE	Ineligibility Reason Code	Yes	(Optional) Use this 3-character field to capture additional information. Any data mapped to this field is visible when you are viewing external award transaction data.
SFA_EA_SUSPEND_RSN	Suspense Reason		1-character suspense code. Currently not being used.
SFA_EA_LOAD_ERROR	Load Error Code		External Award Load Error Message codes are maintained in the Message Catalog/ Message Set Number = 14402/Message Set range 600s.
SFA_EA_SS_VISIBLE	Self Service Visible Code		Yes/No. This field is available on the Award Detail component for each external award transaction. Select *Yes* to show the DESCRLONG value as award detail in Self Service.
FIN_AID_TYPE	Financial Aid Type		Used by External Award Load process to evaluate award posting.
DESCRLONG	Description		Used with the SFA_EA_SS_VISIBLE field. If the **Visible** field is selected, descriptions entered are available for the student to view in Self Service, Reporting Outside Aid-Award Details.

External Award Stage Disbursement Record and Fields

This is the child record to the SFA_EASTAGE_DTL record.

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Field	Description	Visible for Mapping	Comment
SFA_EA_TRANS_NBR	Transaction number		A key assigned by the system.
SFA_EA_SEQNO	Sequence number		A key assigned by the system.
SFA_EA_DISB_SEQNO	Disbursement Sequence	Yes.	(Required) A key assigned by system. It represents each unique disbursement detail for the transaction. If you map several disbursement detail rows from an external file, when you define the mapping, set **Mapping Action** to become a 2-digit numeric value by default. This ensures that the key is created when the external file is processed.
STRM	Term	Yes	(Optional) If provided, the External Award Load process determines whether it is valid with the student's enrollment. If a disbursement ID is not provided, then the first disbursement ID for STRM is updated.
DISBURSEMENT_ID	Disbursement ID	Yes	(Optional) Use to append the disbursement amount to an existing award.
SCHEDULED_AWARD	Scheduled Award	Yes	The scheduled or allocated disbursement amount at the disbursement sequence level.
DISBURSED_AMOUNT	Disbursed Amount	Yes	The disbursed or paid amount at the disbursement sequence level. **Note:** The disbursed amount on the posted award is updated only when the Disburse method for the item type is *No*.

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Field	Description	Visible for Mapping	Comment
SFA_EA_PAY_STATUS	Paid Status	Yes	(Optional) Identify the paid status at the disbursement sequence level. If you select *Yes*, the disbursement sequence amount is equal to the resulting scheduled award amount. **Note:** The disbursed amount on the posted award is updated only when the Disburse method for the item type is *No*.

External Award Stage Counter Record and Fields

This is the child record to the SFA_EASTAGE_HDR record.

Field Name	Description	Visible for Mapping	Comment
SFA_EA_TRANS_NBR	Transaction number		A key assigned by the system.
SFA_EA_STDNT_COUNT		Yes	If mapped, this field is used to capture source transaction student count, but no processing logic is associated with the field.
SFA_EA_AWARD_TOTAL		Yes	If mapped, this field is used to capture source transaction award total, but no processing logic is associated with the field.

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7

Setting Up Auto Packaging and Mass Packaging

Understanding Auto Packaging and Mass Packaging

The items covered in Understanding Auto Packaging and Mass Packaging are required only for Auto Packaging or Mass Packaging. You must also perform the basic setup tasks outlined in the general awarding setup.

This section lists prerequisites and provides an overview of packaging plans.

Prerequisites

Before setting up your packaging plans, perform the following steps to define your institution's needs:

1. Define the populations of students who may have unique needs and for what awards they are eligible.

   Your student populations might include undergraduate students, graduate students, and medical students. Within your graduate population you might have students in a teacher credential program, masters level students, and Ph.D. level students. Within your undergraduate and graduate populations you might group students by their academic program or plan, such as sociology or physical education. Medical students might be grouped by their year in the program, for example first year or fourth year. For reasons of equity, especially if your institution cannot meet all students' financial need, you may want to group students by their financial need, as determined by subtracting Expected Family Contribution (EFC)/Student Aid Index (SAI) from cost of attendance (COA). In that case, you may have a population defined as undergraduate students with need greater than 10,000.00 USD and another group defined as undergraduates with a need less than 10,000.00 USD.

2. Determine which awards students in each group are eligible for or which awards you want to give certain students, and in which order these awards should be offered.

   Each financial aid award that your institution offers may apply to all students or to only a specific group of students. For example, only undergraduates are eligible for Pell Grants and only students from California are eligible for Cal Grants, but you might have a University Grant for which all students are eligible regardless of their career or residency. You are now ready to start grouping awards together into a packaging plan.

Understanding Packaging Plans

Using Financial Aid, you can create packaging plans that give the system instructions on how to award or package a student with various financial aid awards. You should create your packaging plans to meet the needs of your various groups of students. Packaging plans are used when groups of students are packaged in a background process (Mass Packaging) or when the system automatically packages an individual student online (Auto Packaging). A packaging plan groups together financial aid awards and enables you to set specific rules for

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how that group of awards should be given to students. You can also specify other important parameters in a packaging plan, such as how much federal need the packaging plan meets and how the aid is disbursed to students. The packaging plan can incorporate nearly all decisions that a financial aid counselor makes when creating a financial aid package with specific financial aid awards. Because a packaging plan is set up to make decisions that a financial aid counselor would, the packaging plans must reflect your institution's financial aid awarding philosophy so that the automated process works most effectively for you.

If you have a group of similar awards, such as endowed restricted funds, which have very specific target populations, you might want to group these awards together into a related item type group. You can define the group and include it in a packaging plan as an individual award, instead of adding individual restricted aid financial aid item types to packaging plans.

Individual financial aid item types can be part of as many packaging plans as you prefer. Some financial aid item types can be in every packaging plan, such as an unsubsidized Stafford loan.

Not all financial aid item types in a packaging plan are issued to all students who are selected for that packaging plan. The packaging plan assigns financial aid item types to students based on selection criteria defined for each financial aid item type and the overall packaging rules set up as part of the packaging plan. For example, a packaging plan includes ten different financial aid item types, but a student receives only five of the ten financial aid item types because of eligibility requirements or because the student's financial need is met. Although you are not packaging students in this section, it is important to know how packaging plans are used to set them up effectively.

After you group your individual financial aid item types in your various packaging plans, decide in what order you want the various awards to be made. This decision depends heavily on your institution's financial aid packaging policies. The automated Packaging routines process individual financial aid item types in a designated order within each packaging plan. The automated Packaging routine continues awarding up to a dollar limit or a percentage of need defined in the packaging plan, or up to the cost of attendance, depending on the type of awards that are included in the packaging plan. Because awards are packaged in a specific order up to the defined limit, you may want to sequence entitlement awards near the top of the packaging plan to ensure that they are awarded. You might want to put less desirable awards, such as unsubsidized loans, lower in the order.

In addition to selecting and sequencing awards in the packaging plan, you must set up several other parameters. Define packaging targets, award limits, equity limits, loan award limits, work award limits, and the disbursement schedule for each award. For award-related limits and disbursements, you can use the default value for the award—as defined in your financial aid item type setup—or you can define values to be used for the award when it is included in a packaging plan.

Throughout the setup of your packaging plans you can use equations to identify a population of students or to perform calculations. Use the Equation Engine to create these equations.

Using Equation Engine in Packaging

Equation Engine can read any table for which you have security access and can perform various arithmetic operations and external call subroutines.

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> **Note**
>
> If you plan to use equations, you must set them up before you set up packaging plans. Similarly, if you plan to use Mass Packaging, set up equations to be used as part of that process.

You must be familiar with the fields that you can use in equations to understand what student data is available for selection or calculation. Equations are written in statements similar to spoken phrases. For example, if you want to write an equation that calculates different award amounts based on a student's grade level, using the Global A_AMOUNT option, you would first write:

If the student's grade level is freshman, then I want to award 8,000.00 USD; if the student's grade level is sophomore, then I want to award 8,500.00 USD; if the student's grade level is junior, then I want to award 9,000.00 USD, and if the student's grade level is a senior or higher, then I want to award 9,500.00 USD.

This sentence can be written as an equation:

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	SKIP			
2	ASSIGN	Local	AWARD_PERIOD	
3		String	A	
4	END ASSIGN			
5	FIND FIRST	Global	FOUND_FAN_AWD_PER_VW	
6		Table	FAN_AWD_PER_VW	
7		Global EQ	EMPLID	
8		Global EQ	INSTITUTION	
9		Global EQ	AID_YEAR	
10		Local EQ	AWARD_PERIOD	
11	END FIND			
12	IF			
13		Table	FAN_FA_TERM_VW	
14		Field	NSLDS_LOAN_YEAR	
15	<=			
16		Value	1	
17	THEN			
18	ASSIGN	Global	A_AMOUNT	
19		Number	8000.00000	
20	END ASSIGN			
21	ELSE IF			

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Line Number	Equation Keyword	Operand Type	Operand	Comment
22		Table	FAN_FA_TERM_VW	
23		Field	NSLDS_LOAN_YEAR	
24	=			
25		Value	2	
26	THEN			
27	ASSIGN	Global	A_AMOUNT	
28		Number	8500.00000	
29	END ASSIGN			
30	ELSE IF			
31		Table	FAN_FA_TERM_VW	
32		Field	NSLDS_LOAN_YEAR	
33	=			
34		Value	3	
35	THEN			
36	ASSIGN	Global	A_AMOUNT	
37		Number	9000.00000	
38	END ASSIGN			
39	ELSE IF			
40		Table	FAN_FA_TERM_VW	
41		Field	NSLDS_LOAN_YEAR	
42	>=			
43		Value	4	
44	THEN			
45	ASSIGN	Global	A_AMOUNT	
46		Number	9500.00000	
47	END ASSIGN			
48	END IF			

FAPDGRADELVL

In the example, NSLDS_LOAN_YEAR is the field name for academic level. The first section of the equation assigns the global variables needed by the equation engine to identify the proper NSLDS_LOAN_YEAR. The second section tells the system which table, field, and field values are to be evaluated by the equation (NSLDS_LOAN_YEAR value = freshman, sophomore, junior, and so on). Based on the table/field value, the 'Assign Global A_AMOUNT' statement instructs the system to award the student a particular dollar value (if the student is a sophomore, award the student 8,500.00). When using the Equation Engine, you are guided in the writing of your equation by the various field prompts and their values.

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As another example, if you are creating a packaging plan for your graduate career and you need to select all students with a graduate career, you would write an equation using A_SELECT: I want to select all of my students whose career equals graduate.

This sentence can be written as an equation:

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	ASSIGN	Global	STRM	
2		String		
3	END ASSIGN			
4	FIND FIRST	Global	FOUND_FAN_FA_TERM_VW	
5		Table	FAN_FA_TERM_VW	
6		Global EQ	EMPLID	
7		Global EQ	INSTITUTION	
8		Global GE	STRM	
9	END IF			
10	IF			
11		Table	FAN_FA_TERM_VW	
12		Field	ACAD_CAREER	
13	=			
14		String	GRAD	
15	THEN			
16	ASSIGN	Global	A_SELECT	
17		String	GRAD	
18	END ASSIGN			
19	ELSE			
20	ASSIGN	Global	A_SELECT	
21		String	F	
22	END ASSIGN			
23	END IF			

FAPDGRADS

In the example, ACAD_CAREER is the field name for career. The first section of the equation assigns the global variables needed by the equation engine to identify the proper Career. The second section tells the system which table, field, and field values are to be evaluated by the equation (ACAD_CAREER = GRAD). Based on the table/field value, the 'Assign Global A_SELECT' statement instructs the system to select the student, in this example, for the particular packaging plan (if the student's career equals GRAD, assign the student to 'Graduate' packaging plan).

Related Topics

- Campus Solutions Application Fundamentals: Understanding Equations

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Viewing and Editing Equations

This section provides an overview of the Equation Engine and discusses how to:

- Review field names for equations.
- Use packaging data source and equation engine.
- Round in packaging using equations.

Understanding the Equation Engine

The Equation Engine is a very powerful tool that enables you to develop a variety of formulas. The equations are used to select a specific population of students for packaging as well as to calculate award amounts and other numeric values. The Equation Engine uses algebraic equations and Boolean formulas, and it enables you to link equations. Equations are used when defining a packaging plan, setting award maximums and limits, and assigning groups of students to a financial aid item type, equity group, or related item type group.

Before you write an equation, define the information that you want the equation to provide. If you want the equation to provide a listing for a group of students, decide exactly what the process for selecting those students is and then create an equation using the global statement 'ASSIGN GLOBAL A_SELECT' = T' structure. You need to assign this kind of equation as 'Fin Aid Packaging Select Eqtns' for its application prompt. By doing this, you are presented with only Selection Type Equations in Packaging Setup. If you want the equation to provide a calculated value such as an award maximum, decide where the value is derived from and how it is calculated and then create an equation using the Global statement 'ASSIGN GLOBAL A_AMOUNT Number ####.##' structure. You need to assign this kind of equation as 'Fin Aid Packaging Amount Eqtns' for its application prompt. By doing this, you are presented with only Calculation Type Equations in Packaging Setup.

Page Used to View and Edit Equations

Page Name	Definition Name	Navigation	Usage
Equation Editor	EQUATION_EDITOR	**Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Editor**	View and edit equations.

Reviewing Field Names for Equations

Any field in the database can be accessed and used in developing equations if you have defined the table or view in Equation Data Tables **(Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Data Tables)** and the relevant Equation Tree Security has been granted to the table or view **(Set Up SACR**, and then **Security**, and then **Equation Tree Security**, and then **Tables and Views).**

Some delivered packaging equations are system-specific and some are demonstration-specific. System-specific packaging equations contain the prefix FAPK* while demonstration-specific packaging equations contain the prefix FAPD*.

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FAPK = Packaging System Equations. Do not modify any equation with the FAPK* prefix as these equations are used as part of the internal Equation processing of Dual Sourced fields (ISIR vs. IM fields) for Financial Aid Auto and Mass Packaging.

FAPD = Packaging Data Equations are a sample set equations provided as part of the demo database. These equations serve as examples of creating various types of packaging equations supported by the Equation Engine routine.

Related Topics

- Campus Solutions Application Fundamentals: Understanding Equation Engine

Using Packaging Data Source and Equation Engine

The Equation Engine is equipped to handle dual-sourced fields for packaging purposes—same or similar fields that are sourced from the ISIR or an institutional application (PROFILE, or institutional application) that packaging uses. The Equation Engine determines which source data to use.

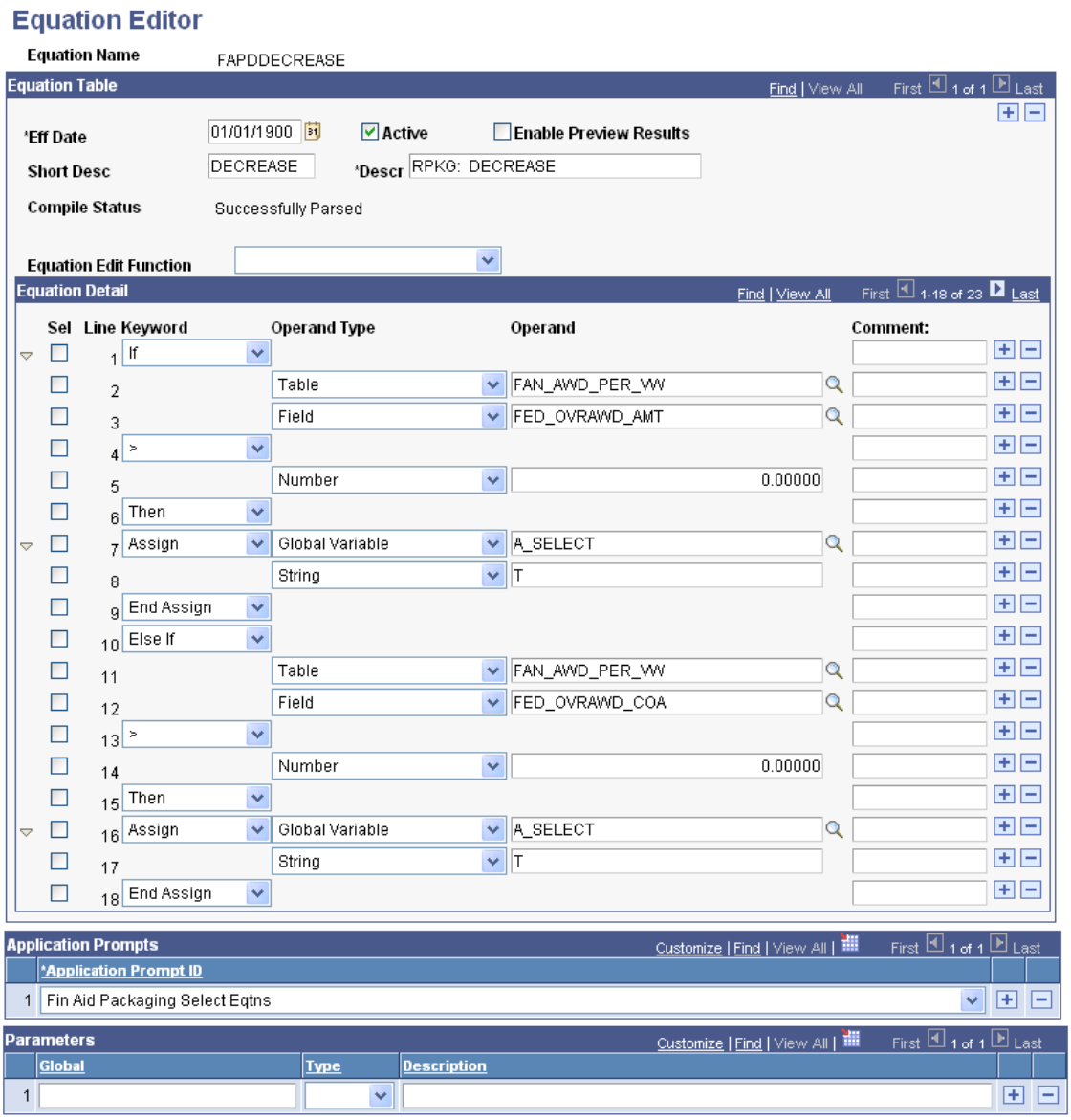
Equations with the prefix FAPK* are system equations that handle the dual-sourced nature of these ISIR or institutional fields. To use these equations, you must create a new equation and invoke a CALL statement to the applicable FAPK system equations and then assign a global variable in your newly created equation. The system uses the Packaging Data Source together with these FAPK system equations fields to return the corresponding value from the appropriate Packaging Data Source. Review the delivered FAPD* equations to see how the corresponding FAPK equations are implemented.

> **Note**
>
> To ensure that the dual-sourced equations behave correctly, do not modify them.

Access the Equation Editor page (**Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Editor**).

This example illustrates the fields and controls on the Equation Editor page.

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The **Equation Table** group box displays the equation description and creation information. Use the **Equation Detail** group box to view and edit an approximate algebraic representation of the equation. Use the scroll bar to view the entire equation.

Equations use dual source fields. Refer to the following table for more details.

Packaging Equations with Dual Source Fields

Equation Name	Description	Field Name 1	RecName	Field Name 2
FAPKAFDCPAR	Set global AFDC_PAR	AFDC_PAR	*DUALSOURCE*	AFDC_PAR
FAPKAFDCSTU	Set glob AFDC_STU	AFDC_STU	*DUALSOURCE*	AFDC_STU

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Packaging Equations with Dual Source Fields

Equation Name	Description	Field Name 1	RecName	Field Name 2
FAPKAGIPAR	Set global AGI_PAR	AGI_PAR	*DUALSOURCE*	AGI
FAPKAGISTU	Set global AGI_STU	AGI_STU	*DUALSOURCE*	AGI
FAPKCHLSPPAR	Set global CHILD_SUPPORT_PAR	CHILD_SUPPORT_PAR	*DUALSOURCE*	CHILD_SUPPORT
FAPKDEPNDNTS	Set global DEPENDENTS	DEPENDENTS	*DUALSOURCE*	DEPENDENTS
FAPKDEPENDST	Set global DEPNDNCY_STAT	DEPNDNCY_STAT	*DUALSOURCE*	DEPNDNCY_STAT
FAPKDTAPPREC	Set global DT_APP_RECEIVED	DT_APP_RECEIVED	*DUALSOURCE*	DT_APP_RECEIVED
FAPKERNINPAR	Set global ERND_INC_CRED_PAR	ERND_INC_CRED_PAR	*DUALSOURCE*	ERND_INC_CRED_PAR
FAPKEXEMPT	Set global NUM_EXEMPTIONS	NUM_EXEMPTIONS	*DUALSOURCE*	NUMBER EXEMPTIONS
FAPKEXEMPTPR	Set global NUM_EXEMPTIONS_PAR	NUM_EXEMPTIONS	*DUALSOURCE*	NUMBER_EXEMPTIONS
FAPKLEGALRES	Set global LEGAL_RESIDENCE	LEGAL_RESIDENCE	*DUALSOURCE*	LEGAL_RESIDENCE
FAPKMAR_STAT	Set global MARITAL_STAT	MARITAL_STAT	*DUALSOURCE*	MARITAL_STAT
FAPKMARSTPAR	Set global MARITAL_STAT_PAR	MARITAL_STAT_PAR	*DUALSOURCE*	MARITAL_STAT
FAPKMONVETBN	Set global MONTHLY_VET_BEN	MONTHLY_VET_BEN	*DUALSOURCE*	MONTHLY_VET_BEN
FAPKNMINCOLL	Set global NUMBER_IN_COLLEGE	NUMBER_IN_COLLEGE	*DUALSOURCE*	NUMBER_IN_COLLEGE
FAPKNUMINFAM	Set global NUM_FAMILY_MEMBERS	NUMBER_IN_FAMILY	*DUALSOURCE*	NUMBER_IN_FAMILY
FAPKNMFAMMEM	Set global NUM_FAMILY_MEMBERS	NUM_FAMILY_MEMBERS	*DUALSOURCE*	NUM_FAMILY_MEMBERS
FAPKNUMINCOL	Set global NUMBER_IN_COLLEGE	NUM_IN_COLLEGE	*DUALSOURCE*	NUM_IN_COLLEGE

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Packaging Equations with Dual Source Fields

Equation Name	Description	Field Name 1	RecName	Field Name 2
FAPKNMMNVTBN	Set global NUM_MONTH_VET_BEN	NUM_MONTH_VET_BEN	*DUALSOURCE*	NUM_MONTH_VET_BEN
FAPKORPHAN	Set global ORPHAN	ORPHAN	*DUALSOURCE*	ORPHAN
FAPKSPERNINC	Set global SPS_EARNED_INCOME	SPS_EARNED_INCOME	*DUALSOURCE*	SPS_EARNED_INCOME
FAPKSSBENPAR	Set global SS_BENEFIT_PAR	SS_BENEFIT_PAR	*DUALSOURCE*	SOC_SEC_BENEFITS
FAPKSSBENSTU	Set global SS_BENEFIT_STU	SS_BENEFIT_STU	*DUALSOURCE*	SOC_SEC_BENEFITS
FAPKSTATERES	Get State Residence	STATE_RESIDENCE	*DUALSOURCE*	STATE_RESIDENCE
FAPKSTERNINC	Set global STD_EARNED_INCOME	STD_EARNED_INCOME	*DUALSOURCE*	STD_EARNED_INCOME
FAPKTOTWKAP	Set global TOTAL_FROM_WKA_P	TOTAL_FROM_WKA_P	*DUALSOURCE*	TOTAL_FROM_WKA_P
FAPKUNTAXIN	Set global UNTAXED_INC	UNTAXED_INC	*DUALSOURCE*	UNTAXED_INCOME
FAPKUNTAXINP	Set global UNTAXED_INC_PAR	UNTAXED_INC_PAR	*DUALSOURCE*	UNTAXED_INCOME
FAPKVETERAN	Set global VETERAN	VETERAN	*DUALSOURCE*	VETERAN

Packaging Data Source Control Equations

The following equations are key equations that the Equation Engine uses as internal triggers in its routine when determining what table to call to obtain correct data:

> **Warning**
>
> Do not modify or remove these equations.

Equation Name	Description
FAPKGDATASRC	Get Packaging Data Source
FAPKRDINSTCT	Read INST_CONTROL
FAPKRDINSTIN	Read INST_INTERPRET
FAPKRDINSTPR	Read INST_PARENT
FAPKRDINSTST	Read INST_STUDENT

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Equation Name	Description
FAPKRDISIRCT	Read ISIR_CONTROL
FAPKRDISIRPR	Read ISIR_PARENT
FAPKRDISIRST	Read ISIR_STUDENT

Rounding in Packaging Using Equations

The Packaging routine does not round up to whole dollar amounts when your equation yields a decimal result for a packaging limit. If the result contains decimals, the Packaging routine produces the following error message: *Message # 9146 Cannot disburse in whole dollars; award contains cents.*

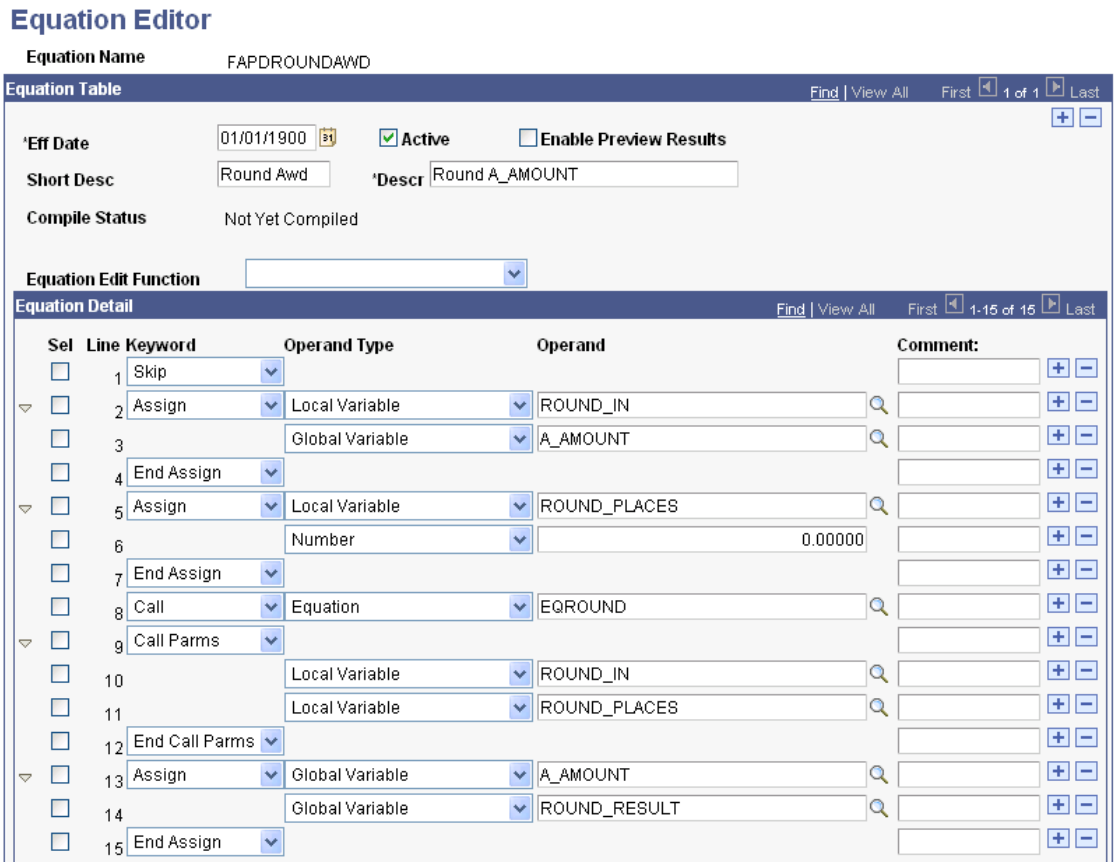
For equations that need to yield a whole dollar result, you must use a rounding equation. Use one of two options:

- Option 1:
  1. Create your A_AMOUNT equation, and at the bottom of the equation, insert a Call statement to the delivered sample equation FAPDROUNDAWD.
  2. Review the FAPDROUNDAWD equation to determine the number of places beyond the decimal point that you want (0=integers or whole numbers, 1, 2, and so on).
  3. Ensure that the Packaging System Equation EQROUND is called as part of FAPDROUNDAWD.
- Option 2:
  1. Create your A_AMOUNT equation, and at the bottom of the equation, append the contents of the delivered sample equation FAPDROUNDAWD to your newly created equation—making sure that you Assign ROUND_IN, ROUND_PLACES (including the number of places beyond the decimal point that you want A_AMOUNT to contain), and ROUND_RESULT.
  2. Ensure that the Packaging System Equation EQROUND is called as part of your newly created equation.

> **Note**
>
> For this rounding logic to work properly, it is imperative that all elements of FAPDROUNDAWD are employed and that EQROUND is called as part of that routine —these components should not be modified by you or anyone on your staff.
>
> Here is an example of the Equation Editor page, showing the FAPDROUNDAWD equation:

This example illustrates the fields and controls on the Example Equation Editor page.

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Related Topics

- Campus Solutions Application Fundamentals: Understanding Equations

Reviewing Equations

This section discusses how to view equations as algebraic expressions.

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Page Used to Review Equations

Page Name	Definition Name	Navigation	Usage
Review Equations	SCC_EQUATION_VIEW	• **Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Review Equations** • Click **Equation Detail** on the Related Item Type Group page, Packaging Plan page, FM Target page, IM Target page, Equity Rule page, Packaging Limits page, or the Packaging Rules 1 page.	View equation as algebraic expressions.

Viewing Equations as Algebraic Expressions

Access the Review Equations page (**Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Review Equations**).

This example illustrates the Review Equations page.

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```
- <EQUATION>
    <EQUATIONNAME>FAPDDECREASE</EQUATIONNAME>
  - <IF>
      <TABLE>FAN_AWD_PER_VW</TABLE>
      <FIELD>FED_OVRAWD_AMT</FIELD>
      > 0
      <THEN />
    - <ASSIGN>
        <GLOBAL>A_SELECT</GLOBAL>
        <STRING>T</STRING>
      </ASSIGN>
      <ELSEIF />
      <TABLE>FAN_AWD_PER_VW</TABLE>
      <FIELD>FED_OVRAWD_COA</FIELD>
      > 0
      <THEN />
    - <ASSIGN>
        <GLOBAL>A_SELECT</GLOBAL>
        <STRING>T</STRING>
      </ASSIGN>
      <ELSE />
    - <ASSIGN>
        <GLOBAL>A_SELECT</GLOBAL>
        <STRING>F</STRING>
      </ASSIGN>
    </IF>
  </EQUATION>
```

This page displays the equation name and an approximate algebraic representation of the equation. You cannot edit the equation on this page. Use the scroll bar to view the entire equation.

> **Note**
>
> This summary is a representation of the equation that you created on the Equation Editor page. The Equation Editor page determines how your equation functions.

Reviewing Equation Examples

This section contains examples of equations. It details three equations that are used to create loan validation edits for financial aid. These equations are delivered with the system as part of the Loan Validation process. This section discusses these equations:

- Packaging selection.
- Packaging calculation
- Verifying student is enrolled.

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Packaging Selection Equation

Sample Packaging Selection Equation resulting in a ASSIGN GLOBAL A_SELECT = True or False result. This equation provides an answer to the question *Is a student an undergraduate?* (FAPDUGRADS, Verify Student is an Undergrad):

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	IF			
2		Global	ACAD_CAREER	
3	=			
4		String	UGRAD	
5	THEN			
6	ASSIGN	Global	A_SELECT	
7		String	T	
8	END ASSIGN			
9	ELSE			
10	ASSIGN	Global	A_SELECT	
11		String	F	
12	END ASSIGN			
13	END IF			

Packaging Calculation Equation

Sample Packaging Calculation Equation resulting in a ASSIGN GLOBAL A_AMOUNT = numeric value result. This equation provides an amount *Set the award amount for an early admission student* (FAPDEARLYADM, Set early admission amount):

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	SKIP			
2	IF			
3	NOT			
4	EXISTS	Global	FOUND_FAN_ISIR_STD_VW	
5	THEN			
6	FIND FIRST	Global	FOUND_FAN_ISIR_STD_VW	
7		Table	FAN_ISIR_STD_VW	
8		Global EQ	EMPLID	
9		Global EQ	INSTITUTION	
10		Global EQ	AID_YEAR	
11	END FIND			
12	END IF			

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Line Number	Equation Keyword	Operand Type	Operand	Comment
13	IF			
14		Table	FAN_ISIR_STD_VW	
15		Field	EARLY_ADMISSION	
16	=			
17		Value	1	
18	THEN			
19	ASSIGN	Global	A_AMOUNT	
20		Number	2500.00000	
21	END ASSIGN			
22	ELSE			
23	ASSIGN	Global	A_AMOUNT	
24		Number	1250.00000	
25	END ASSIGN			
26	END IF			

Verifying Student Is Enrolled Equation

This equation provides an answer to the question *Is a student enrolled* (U_FA_LOAD, Verify Student is Enrolled):

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	IF			
2		Table	STDNT_AID_ATRBT	
3		Field	AID_APP_STATUS	
4	< >			
5		Prompted Value	C	C = Cancelled
6	THEN			
7	IF			
8		Table	U_FA_TERM_VW	
9		Field	TERM_SRC	
10	< >			
11		Prompted Value	T	T = Term
12	THEN			
13	ASSIGN	Global Variable	RESULT	
14		String	FAILED	
15	END ASSIGN			
16	ASSIGN	Global Variable	HR_MSG_SET_NBR	

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Line Number	Equation Keyword	Operand Type	Operand	Comment
17		String	21100	
18	END ASSIGN			
19	ASSIGN	Global Variable	HR_MSG_NBR	
20		String	00005	
21	END ASSIGN			
22	ELSE			
23	IF			
24		Table	U_FA_TERM_VW	
25		Field	FA_LOAD	
26	=			
27		Prompted Value	F	F = Full Time
28	OR			
29		Table	U_FA_TERM_VW	
30		Field	FA_LOAD	
31	=			
32		Prompted Value	H	H = Half Time
33	OR			
34		Table	U_FA_TERM_VW	
35		Field	FA_LOAD	
36	=			
37		Prompted Value	T	T = Three Quarters
38	THEN			
39	ASSIGN	Global Value	RESULT	
40		String	PASS	
41	END ASSIGN			
42	ELSE			
43	ASSIGN	Global Value	RESULT	
44		String	FAILED	
45	END ASSIGN			
46	ASSIGN	Global Variable	HR_MSG_SET_NBR	
47		String	21100	
48	END ASSIGN			
49	ASSIGN	Global Variable	HR_MSG_NBR	
50		String	00004	
51	END ASSIGN			
52	END IF			
53	END IF			
54	ELSE			

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Line Number	Equation Keyword	Operand Type	Operand	Comment
55	ASSIGN	Global Variable	RESULT	
56		String	FAILED	
57	END ASSIGN			
58	ASSIGN	Global Variable	HR_MSG_SET_NBR	
59		String	FAILED	
60	END ASSIGN			
61	ASSIGN	Global Variable	HR_MSG_NBR	
62		String	00003	
63	END ASSIGN			
64	END IF			

Creating Equity Item Type Groups

To set up equity item type groups, use the Packaging Equity Item Type component (PKG_EQUITY_GROUP).

This section provides an overview of equity item type groups and discusses how to define equity item type groups.

Understanding Equity Item Type Groups

Equity funds are "free money" for students, such as grants and scholarships, and can include parent and student contributions. Equity limits are established as part of the packaging plan and equity offsets reduce the amount of equity funds available to a student. Financial aid item types that are defined as equity awards are applied toward the equity limit when they are awarded.

Equity item type groups enable you to group together financial aid item types, regardless of their defined equity attribute, for consideration as equity offsets within a packaging plan. You can designate a financial aid item type not defined as an equity award as an equity item type by including it in an equity item type group. Using equity item type groups, a group of financial aid item types can be treated as equity awards in one packaging plan but not in another. You do not need to include financial aid item types defined as equity awards in equity item type groups, but nothing prevents you from doing so.

Related Topics

- Defining Awarding and Rounding Rules
  Access the FA Item Type 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**).

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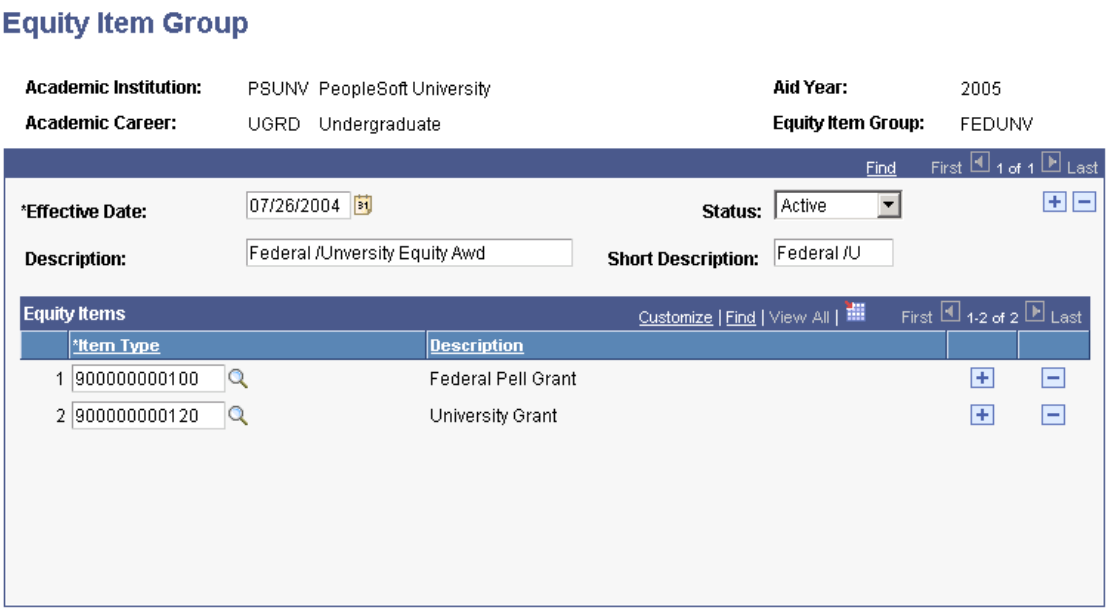
Page Used to Create Equity Item Type Groups

Page Name	Definition Name	Navigation	Usage
Equity Item Group	PKG_EQUITY_GROUP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Equity Item Types**, and then **Equity Item Group**	Define an equity item type group. Add or delete financial aid item types from an existing group.

Defining Equity Item Type Groups

Access the Equity Item Group page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Equity Item Types**, and then **Equity Item Group**).

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



Field or Control	Description
Item Type	Select a financial aid item type to include in this equity item type group. All financial aid item types, whether they have been defined as an equity award or not, are available for selection. Insert a new row to add additional financial aid item types to the equity item type group.

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Creating Related Item Type Groups

This section provides an overview of related item type groups and discusses how to define related item type groups.

Understanding Related Item Type Groups

To set up related item type groups, use the Related Item Type Group component (PKG_REL_ITEM_GROUP).

Related item type groups are used to award a group of similar funds, such as institutional or endowed restricted funds, in a specific order until the group maximum is met. For example, an institution may have more than 200 endowed or restricted funds from which to award a student. By implementing a related item type group, you can group these funds together in discrete categories for quick evaluation through packaging plans. If the related item type is used in a packaging plan, the packaging plan maximum may also affect the amount awarded from the related item type group. When a related item type is used in a packaging plan, only the financial aid item types for which a student qualifies are actually awarded.

Page Used to Create Related Item Type Groups

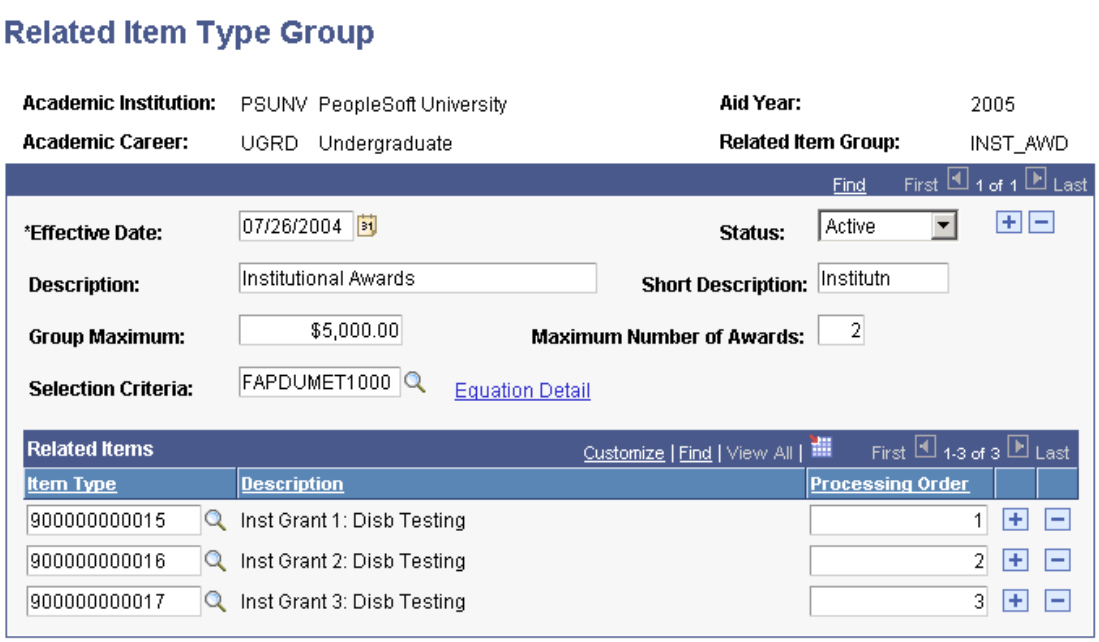
Page Name	Definition Name	Navigation	Usage
Related Item Type Group	PKG_REL_ITEM_GROUP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Related Item Type Group**, and then **Related Item Type Group**	Define related item type groups. Add or delete financial aid item types from an existing group.

Defining Related Item Type Groups

Access the Related Item Type Group page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Related Item Type Group**, and then **Related Item Type Group**).

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

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Field or Control	Description
Group Maximum and **Maximum Number of Awards**	Enter the maximum dollar amount and the maximum number of awards that can be awarded to one student from this related item group.
Selection Criteria	Select an equation that defines the group of students to select for this related item type group from a list of the equations that you created using the Equation Engine. This field is optional; you can use it to refine the group of students who are considered for these awards.
Equation Detail	This link appears only if you enter an equation in the **Selection Criteria** field. Click to access the Review Equations page and view the selected equation written as an algebraic expression.
Item Type	Select a financial aid item type to include in this related item type group. Insert rows to add additional financial aid item types to the related item type group.
Processing Order	Enter the order in which you want the system to evaluate the associated financial aid item types, with the lowest number evaluated first.

Defining Packaging Plans

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

- Define packaging plan IDs.
- Set up FM packaging target.
- Set up IM packaging target.

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- Define packaging equity limits and offsets.
- Define loan and work packaging limits.
- Define packaging rules: item type selection, sequence, and limits.
- Set packaging rule award limits.
- Define packaging rules: award status, disbursement plan, and split code.

Understanding Packaging Plan Setup

To set up packaging plans, use the Packaging Plan component (PACKAGE_PLAN_TABLE).

You can set up as many packaging plans as you want. Each plan can have a different set of awards, with different award limits, targeted for different populations of students. Your philosophy about financial aid awarding informs the setting up and adding of packaging plans. Packaging plans are aid year-specific but can be copied from year to year and modified to reflect any changes for the new aid year. Packaging plans are also career-specific.

Before you define your packaging plans, identify your various student populations and their eligibility for various types of financial aid. Creating a flow chart and ranking the various awards available for each group of students may help you to define what each packaging plan should include and what rules it should incorporate.

Pages Used to Define Packaging Plans

Page Name	Definition Name	Navigation	Usage
Packaging Plan	PACKAGE_PLAN_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Plan**	Define your packaging plans. When you first add a packaging plan you are asked to enter a career to associate with the plan and a packaging plan ID. Packaging plans are career-specific.
Review Equations	SCC_EQUATION_VIEW	Click **Equation Detail** on the Packaging Plan page, FM Target page, IM Target page, Equity Rule page, Packaging Limits page, or the Packaging Rules 1 page.	View a packaging equation written as an algebraic expression.
Copy Package Plan Data	PACKAGE_COPY	Click the **Copy** button on the Packaging Plan page.	Copy packaging plan ID information from one combination of institution, aid year, academic career, packaging plan, effective date, and processing order to another.

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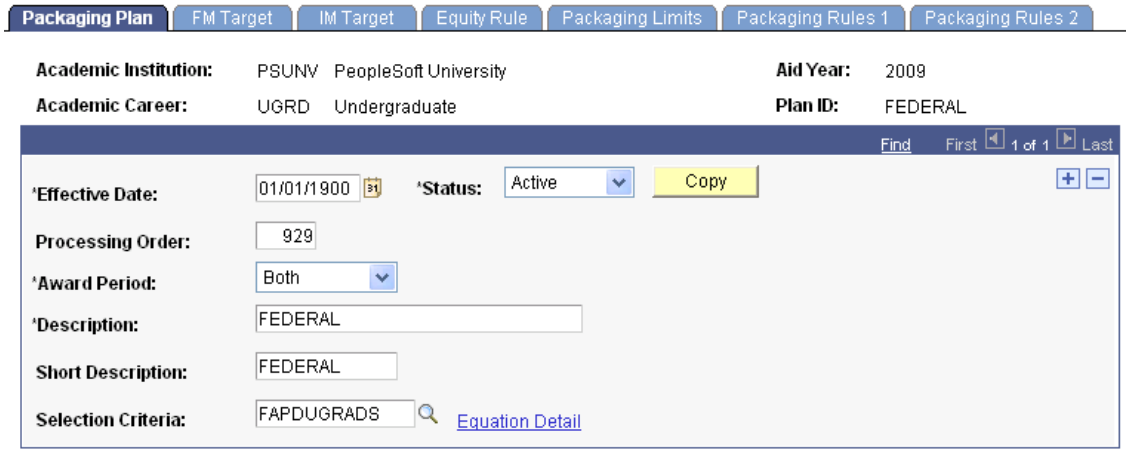
Page Name	Definition Name	Navigation	Usage
FM Target	PKG_PLAN_FED_TRGT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **FM Target**	Set up the packaging target for the packaging plan using federal methodology (FM).
IM Target	PKG_PLAN_INST_TRGT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **IM Target**	Set up the packaging target for the packaging plan using institutional methodology (IM).
Equity Rule	PACKAGE_PLAN_LIMIT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Equity Rule**	Define packaging equity limits and offsets.
Packaging Limits	PACKAGE_PLAN_LMT2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Limits**	Define loan and work award limits for this packaging plan. You can define different limits for federal methodology and institutional methodology.
Packaging Rules 1	PACKAGE_RULE_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Rules 1**	Define financial aid item types, gap financial aid item types, and related item type groups to the packaging plan. Assign a processing sequence, the percentage of the student's remaining need to meet, and the minimum and maximum award amounts.
Packaging Rule Award Limits	PKG_RULE_LIMIT_SEC	Click the **Spending Limit Preferences** link on the Packaging Rules 1 page.	Set packaging rule award limits by further defining spending limits for the financial aid item type in the packaging plan.
Packaging Rules 2	PACKAGE_RULE_DISB	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Rules 2**	Define the default award action, disbursement plan, and split code for each financial aid item type used in the packaging plan.

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Defining Packaging Plan IDs

Access the Packaging Plan page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Plan**).

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



Field or Control	Description
Processing Order	When the Mass Packaging process has to evaluate many packaging plans during a run, the processing order determines the sequence in which the selected packaging plans are reviewed. The Mass Packaging routine processes the packaging plan with the lowest processing order number first.

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Field or Control	Description
Award Period	Select the award period to which the packaging plan applies. The packaging plan's award period is particularly important during multiple award period processing. *Academic:* The packaging rules in this packaging plan apply to the academic award period. If existing awards have disbursement plan/split code combinations that indicate they belong to the academic award period, the existing awards are reevaluated and may be changed or canceled. If the disbursement plan/split code combinations indicate the existing awards belong to the non-standard award period, the existing awards are not reevaluated. If the disbursement plan/split code combinations indicate the existing awards belong to the both award periods, only the portion of the existing awards that belong to the academic award period are reevaluated. *Both:* The packaging rules in this packaging plan apply to the both award periods. All existing awards are reevaluated and may be changed or canceled. *Non Std* (non-standard): The packaging rules in this packaging plan apply to the non-standard award period. If existing awards have disbursement plan/split code combinations that indicate they belong to the non-standard award period, the existing awards are reevaluated and may be changed or canceled. If the disbursement plan/split code combinations indicate the existing awards belong to the academic award period, the existing awards are not reevaluated. If the disbursement plan/split code combinations indicate the existing awards belong to the both award periods, only the portion of the existing awards that belong to the non-standard award period are reevaluated.
Description	For reference, you can include the career that uses this packaging plan in the description for easy identification.
Selection Criteria	Select an equation that determines which students are selected for evaluation with this packaging plan during a Mass Packaging run. You set up these equations with the Equation Engine.
Equation Detail	This link appears only if you enter an equation in the **Selection Criteria** field. Click to access the Review Equations page and view the selected equation written as an algebraic expression.

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Field or Control	Description
Copy	Click this button to access the Copy Package Plan Data page and copy packaging plan ID information from one combination of institution, aid year, academic career, packaging plan, effective date, and processing order to another.

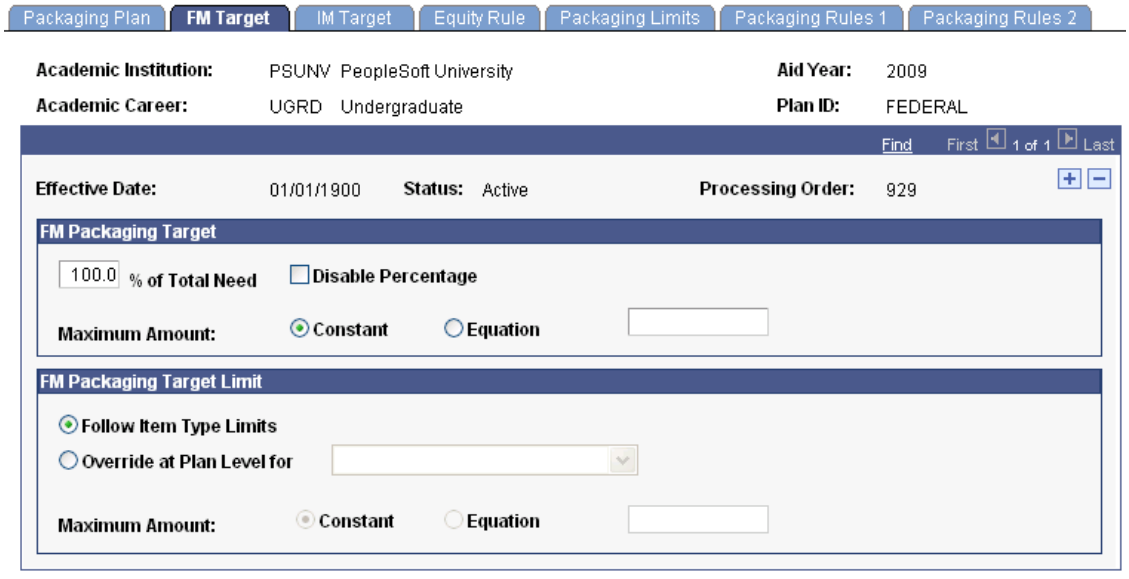
Related Topics

- Understanding Multiple Award Period Processing
  Multiple award period processing functionality enables you to process students for a subsequent award period without Packaging canceling awards for the initial award period or determining incorrect award amounts. It also enables you to use the same Financial Aid Item Type for the AAP and the NSAP. The ability to process awards in passive/active mode between award periods and the disbursement protection feature make this possible. An exception to this rule is subsequent awards—with aggregate area level limit rules—made to students because their NSLDS loan year has changed during the award year. You also cannot use the same Financial Aid Item Type for the AAP and NSAP for non-Direct Lending loans. In these cases, you must still use separate Financial Aid Item Types for each award period.

Setting Up FM Packaging Target

Access the FM Target page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **FM Target**).

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



The packaging target is defined either as a percentage of the student's financial need or a specific dollar amount or both. For example, the target could be to award students up to 75 percent of their FM need *or* up to 12,000.00 USD, or to award 75 percent of their FM need *up to* 12,000.00 USD. When you populate this page, the packaging plan evaluates the student's

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FM need. The packaging plan then attempts to award students up to the target amount. You can also establish award amount limits for this packaging plan that are more restrictive than those defined at the financial aid item type level.

FM Packaging Target

Field or Control	Description
% of Total Need (percentage of total need)	Enter the percentage of the student's FM need that you want this packaging plan to meet.
Disable Percentage	Select this check box if you want the packaging target to be determined by a maximum amount only. Clear if you want to use a maximum amount as well as a percentage to determine the packaging target. If you are not entering a maximum amount, you must clear this check box. When you select both **% of Total Need** and **Maximum Amount** you can indicate, for example, that the packaging plan is to meet 80 percent of FM need but only up to a maximum of 5,000.00 USD.
Maximum Amount	Enter the maximum amount of financial aid to be awarded by this packaging plan. Select *Constant* to use a specific, constant dollar amount as the packaging target. Select *Equation* to invoke an equation to determine the dollar amount to be used as the FM packaging target. The values in this field include all of the equations that you created using the Equation Engine.
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

> **Note**
>
> FFELP or Direct Subsidized and Unsubsidized loans are treated differently by the packaging targets and limits. These awards are not limited by the packaging target because the eligibility for these awards allows them to be given up to the aggregate level maximum without regard to an artificial limit.

FM Packaging Target Limit

Field or Control	Description
Follow Item Type Limits	Select this option to invoke the financial aid item type limits established on the FA Item Type 4 page.

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Field or Control	Description
Override at Plan Level for	Select this option to establish award amount limits that differ from those at the financial aid item type level for financial aid item types in a specific meet need/cost category. The meet need/cost categories that you can select in this field are *Conditional, Cost Only, No Effect,* and *Special Need/Cost.*
Maximum Amount	Enter the new packaging plan-specific limit for the financial aid item types that you specified in the **Override at Plan Level for** field. Select *Constant* to use a specific, constant dollar amount as the limit. Select *Equation* to use an equation to determine the dollar amount used as the limit. The values include all the equations that you created using the Equation Engine.
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

> **Note**
>
> The cost of attendance is always the maximum limit for awarding with a packaging plan except when awarding *No Effect* awards.

Related Topics

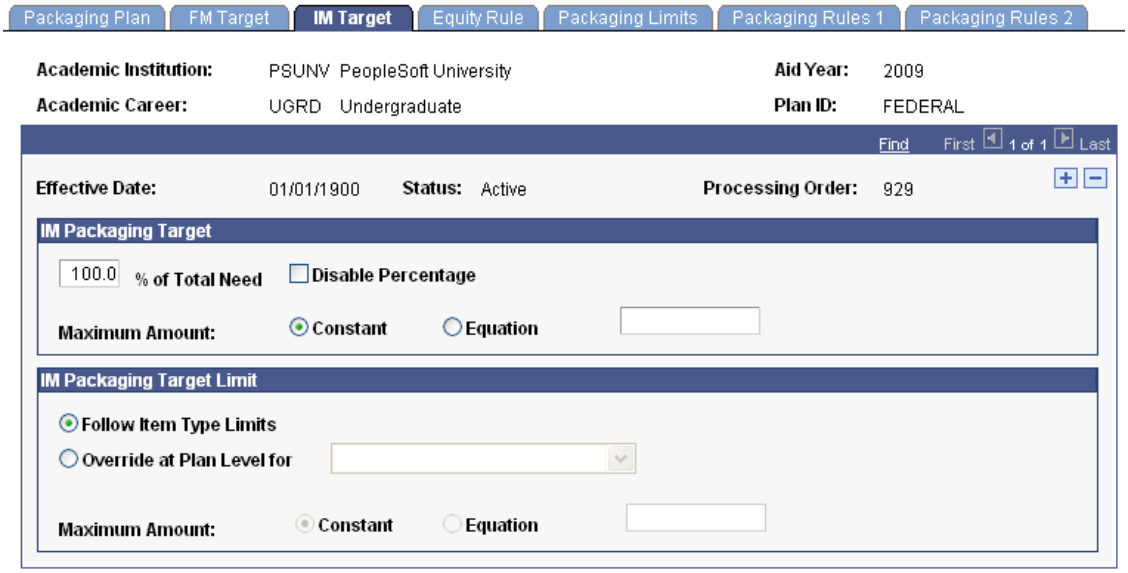
- Defining Awarding and Rounding Rules
  Access the FA Item Type 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**).

Setting Up IM Packaging Target

Access the IM Target page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **IM Target**).

This example illustrates the fields and controls on the IM Target page.

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The packaging target is defined either as a percentage of the student's financial need or a specific dollar amount or both. For example, the target could be to award students up to 80 percent of their IM need *or* up to 8,000.00 USD, or to award 80 percent of their IM need *up to* 8,000.00 USD. When you populate this page, the packaging plan evaluates the student's IM need. The packaging plan then attempts to award students up to the target amount. You can also establish award amount limits for this packaging plan that are more restrictive than those defined at the financial aid item type level.

The fields on this page match those on the FM Target page.

Related Topics

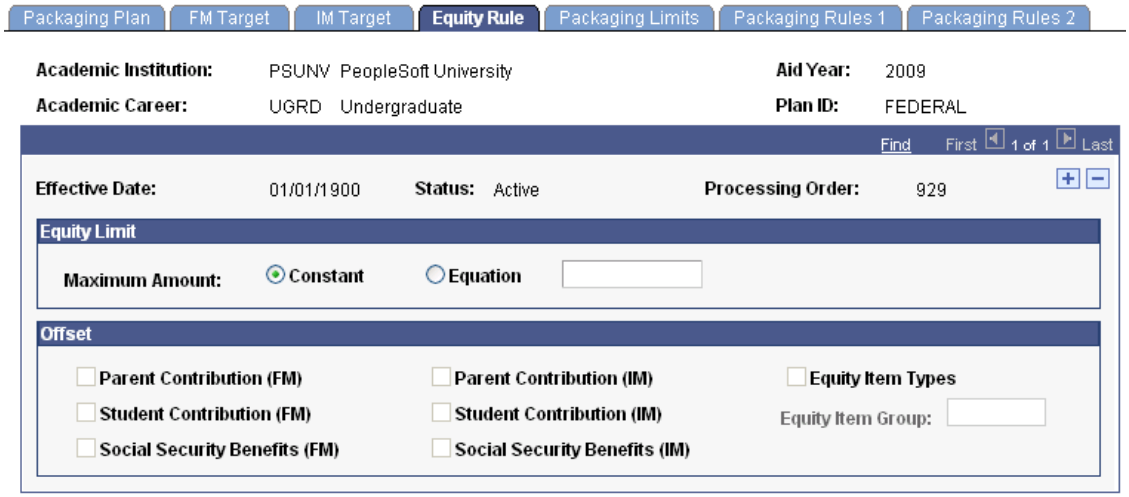
- Setting Up FM Packaging Target
  Access the FM Target page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **FM Target**).

Defining Packaging Equity Limits and Offsets

Access the Equity Rule page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Equity Rule**).

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

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Equity packaging enables you to ensure that similar populations of students—all graduates, all teacher credential candidates, all first-time freshmen, all students whose EFC/SAI equals zero, and so on—are packaged equally with "free" money from federal, state, institutional, or private sources. The equity target amount—referred to in our system as the equity limit—can be reduced or offset by parent contribution, student contribution, Social Security benefits, equity item type groups, or any combination of these resources. The Packaging routine prevents the student from being awarded an equity award amount (from the equity aid financial aid item types included as packaging rules) that exceeds the equity target amount.

Equity Limit

Field or Control	Description
Maximum Amount	Enter the maximum amount of financial aid to be awarded from equity item types for this packaging plan. You must enter an amount or an equation to make the fields in the **Offset** group box available. Select *Constant* to use a specific, constant dollar amount as the equity limit. Enter the dollar amount in the field to the right of the **Equation** option. Select *Equation* to invoke an equation to determine the dollar amount used as the equity limit. The values include all the equations that you created using the Equation Engine.
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

Offset

Reduce the equity amount awarded by the packaging plan by selecting one or more of the offset check boxes. If you select any FM offsets, the IM offsets are not available, and vice versa.

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Field or Control	Description
Parent Contribution (FM) (parent contribution Federal Methodology)	Select this check box to use the amount that the student's parent is expected to contribute—as calculated using federal methodology from federal application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as: • Academic, the Packaging routine uses the prorated parent contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated parent contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated parent contribution and the non-standard prorated parent contribution as an equity offset.
Student Contribution (FM) (student contribution Federal Methodology)	Select this check box to use the amount that the student is expected to contribute—as calculated using federal methodology from federal application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as: • Academic, the Packaging routine uses the prorated student contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated student contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated student contribution and the non-standard prorated student contribution as an equity offset.
Social Security Benefits (FM) (social security benefits Federal Methodology)	Select this check box to use the amount of Social Security benefits received by the student as an equity offset. This amount comes from federal application data.

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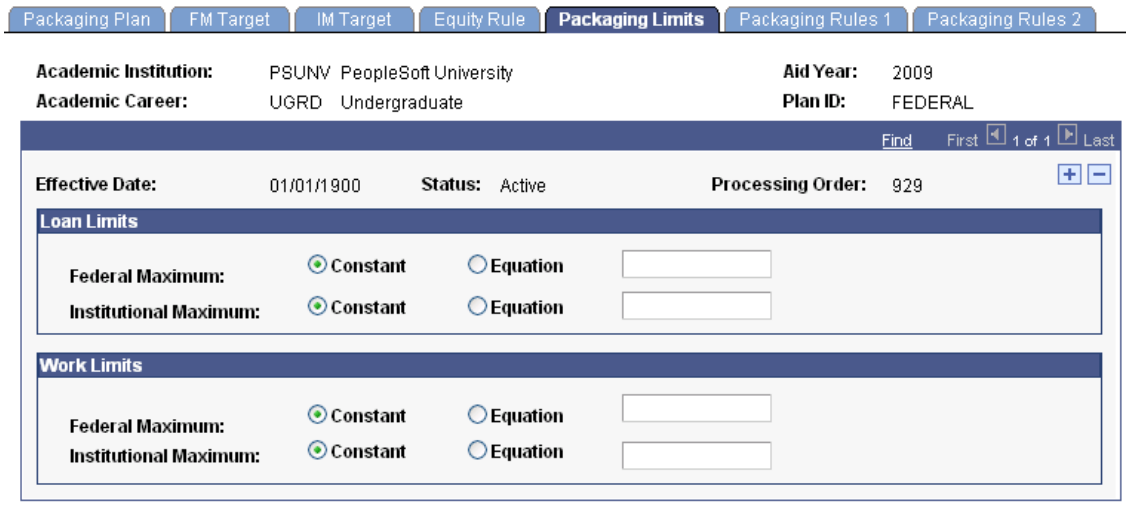
Field or Control	Description
Parent Contribution (IM) (parent contribution Institutional Methodology)	Select this check box to use the amount that the student's parent is expected to contribute—as calculated using institutional methodology from institutional application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as: • Academic, the Packaging routine uses the prorated parent contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated parent contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated parent contribution and the non-standard prorated parent contribution as an equity offset.
Student Contribution (IM) (student contribution Institutional Methodology)	Select this check box to use the amount that the student is expected to contribute—as calculated using institutional methodology from institutional application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as: • Academic, the Packaging routine uses the prorated student contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated student contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated student contribution and the non-standard prorated student contribution as an equity offset.
Social Security Benefits (IM) (social security benefits Institutional Methodology)	Select this check box to use the amount of Social Security benefits received by the student as an offset. This amount comes from institutional application data.
Equity Item Types	Select this check box to use an equity item type group as an offset. The **Equity Item Group** field becomes active when you select this check box.
Equity Item Group	Select an equity item type group to use as an offset. You cannot select an equity item type group without selecting the **Equity Item Types** check box. Equity item type groups are defined on the Equity Item Group page. See Creating Equity Item Type Groups.

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Defining Loan and Work Packaging Limits

Access the Packaging Limits page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Limits**).

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



Loan Limits

Enter a maximum amount awarded by this packaging plan for federal loans and institutional loans.

Field or Control	Description
Federal Maximum	Enter the maximum amount of financial aid from federal loans to be awarded for this packaging plan. The Packaging routine determines whether a loan is a federal loan using the **Source** field value from the FA Item Type 1 page; if the source is *F—Federal,* then the loan counts toward this limit. Select *Constant* to use a specific, constant dollar amount as the federal loan limit. Enter the dollar amount in the field to the right of the **Equation** option. Select *Equation* to use an equation to determine the dollar amount used as the federal loan limit. The values include all the equations that you created using the Equation Engine.

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Field or Control	Description
Institutional Maximum	Enter the maximum amount of financial aid from institutional loans to be awarded for this packaging plan. The Packaging routine determines whether a loan is a institutional loan using the **Source** field value from the FA Item Type 1 page; if the source is *I—Institutional,* then the loan counts toward this limit. Select *Constant* to use a specific, constant dollar amount as the institutional loan limit. Enter the dollar amount in the field to the right of the **Equation** option. Select *Equation* to use an equation to determine the dollar amount used as the institutional loan limit. The values include all the equations that you created using the Equation Engine.
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

Work Limits

Enter a maximum amount awarded by this packaging plan for federal work-study and institutional work-study.

Field or Control	Description
Federal Maximum	Enter the maximum amount of financial aid from federal work-study to be awarded for this packaging plan. The Packaging routine determines whether a work-study award is a federal work-study award using the **Source** field value from the FA Item Type 1 page; if the source is *F—Federal,* then the work-study award counts toward this limit. Select *Constant* to use a specific, constant dollar amount as the federal work-study limit. Enter the dollar amount in the field to the right of the **Equation** option. Select *Equation* to use an equation to determine the dollar amount used as the federal work-study limit. The values include all the equations that you created using the Equation Engine.

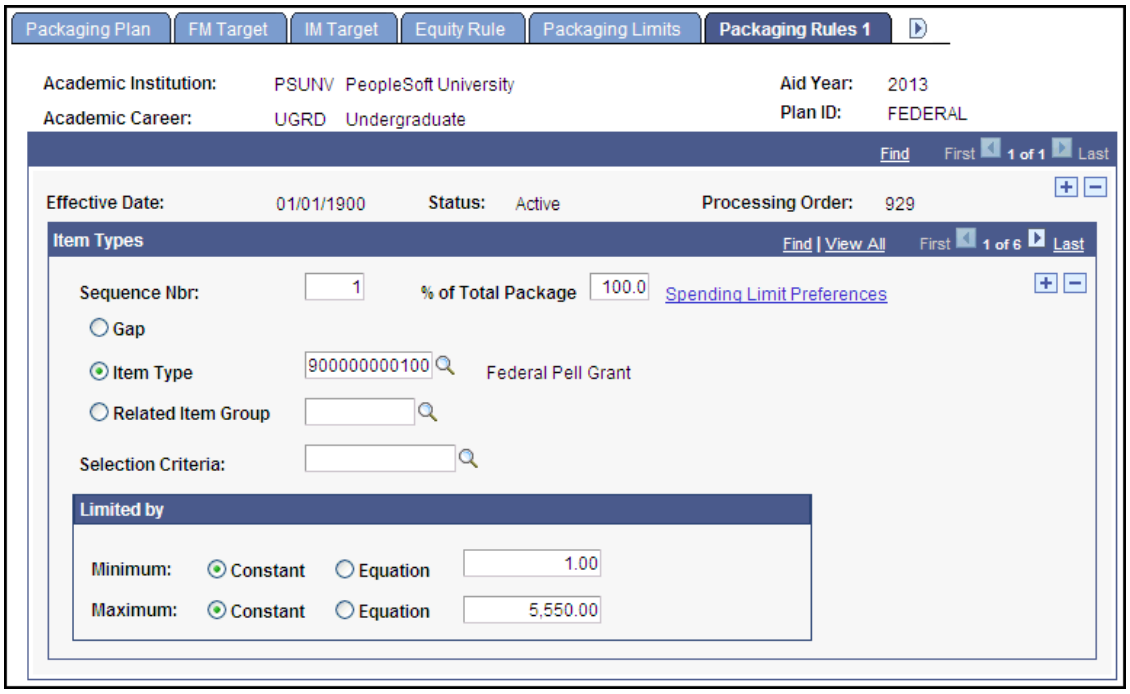
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Field or Control	Description
Institutional Maximum	Enter the maximum amount of financial aid from institutional work-study to be awarded for this packaging plan. The Packaging routine determines whether a work-study award is a federal work-study award using the **Source** field value from the FA Item Type 1 page; if the source is *I—Institutional,* then the work-study award counts toward this limit. Select *Constant* to use a specific, constant dollar amount as the institutional work-study limit. Enter the dollar amount in the field to the right of the **Equation** option. Select *Equation* to use an equation to determine the dollar amount used as the institutional work-study limit. The values include all the equations that you have created using the Equation Engine.
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

Defining Packaging Rules: Item Type Selection, Sequence and Limits

Access the Packaging Rules 1 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Rules 1**).

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



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You should complete the Packaging Rules 1 page in conjunction with the Packaging Rules 2 page.

Item Types

If you are setting up a Pell-only repackaging plan, you can only enter Pell Grant financial aid item types as a packaging rule and you must use the **Item Type** option.

Field or Control	Description
Sequence Nbr (sequence number)	Determines the order in which the system processes the associated packaging rule within the packaging plan.
Gap	Select this option to hold a defined amount that the Awarding process does not award. A gap is a place holder or limit condition. Use it as a means of stretching funds by not covering all unmet need, or use it as a method of reserving unmet need for specific institutional funds or additional external awards later. The Packaging routine first reviews the aid processing rule assigned to the student's program, and uses the gap financial aid item type associated with the aid processing rule. If an aid processing rule is not associated with the program or no gap financial aid item type has been assigned to the aid processing rule, the Packaging routine reviews the aid processing rule assigned to the student's career (as specified on the Valid Careers for Aid Year page) to determine the gap financial aid item type. If no aid processing rule has been assigned to the student's career, or no gap financial aid item type has been assigned to the aid processing rule, the Packaging routine uses the gap financial aid item type entered on the Financial Aid Defaults page. **Note:** Because the Packaging routine dynamically determines the gap financial aid item type based on defaults (aid processing rule set or installation defaults), you do not (and cannot) enter the gap financial aid item type on this page. You receive a conversion program to blank out the financial aid item type if the packaging rule is a gap packaging rule for your existing records.
Item Type	Select this option to associate a financial aid item type with this packaging plan. Enter the financial aid item type that you want the packaging plan to award. For a financial aid item type value to be available, the financial aid item type must be defined as an auto package award. See Defining Awarding and Rounding Rules.
Related Item Group	Select this option to associate a related item type group with this packaging plan. Enter the related item type group that you want the packaging plan to award.

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Field or Control	Description
Selection Criteria	Enter an equation in this field if additional awarding selection criteria are to be used specifically with this plan for this particular financial aid item type.
Equation Detail	This link is available after you have select an equation. Click to view the Review Equations page.
% of Total Package (percentage of total package)	Enter the percentage of the student's remaining unmet need that this financial aid item type can cover. For example, you could indicate that no more than 10 percent of the student's remaining unmet need can be awarded from a university grant. The percentage amount can include one decimal place, for example 8.5 percent.
Spending Limit Preferences	Click this link to access the Packaging Rule Award Limits page and further limit or control spending for the financial aid item type in this specific packaging plan.

Limited By

Set additional maximum and minimum limits for this financial aid item type in this specific packaging plan. When Auto Packaging and Mass Packaging determine award amounts and when you run the Validation process, all eligibility rules, aggregate limits, minimum and maximum award limits, fiscal fund availability, and financial aid item type rules are checked. When determining the maximum award limit, the lowest maximum award limit from the maximum limits set at the item type, financial aid item type, aggregate aid, fiscal item type, and packaging plan levels is used. The minimum award limit used is the lowest minimum award limit from the minimum limits set at the item type, financial aid item type, and packaging plan levels.

Field or Control	Description
Minimum	Enter the minimum amount of financial aid from this financial aid item type to be awarded per term for this packaging plan. Select *Constant* to assign a specific, constant dollar amount as the award minimum. Enter the dollar amount in the field to the right of the **Equation** option. Select *Equation* to invoke an equation to determine the dollar amount used as the award minimum.
Maximum	Enter the maximum amount of financial aid from this financial aid item type to be awarded per term for this packaging plan. Select *Constant* to assign a specific, constant dollar amount as the award maximum. Enter the dollar amount in the field to the right of the **Equation** option. Select *Equation* to invoke an equation to determine the dollar amount used as the award maximum.

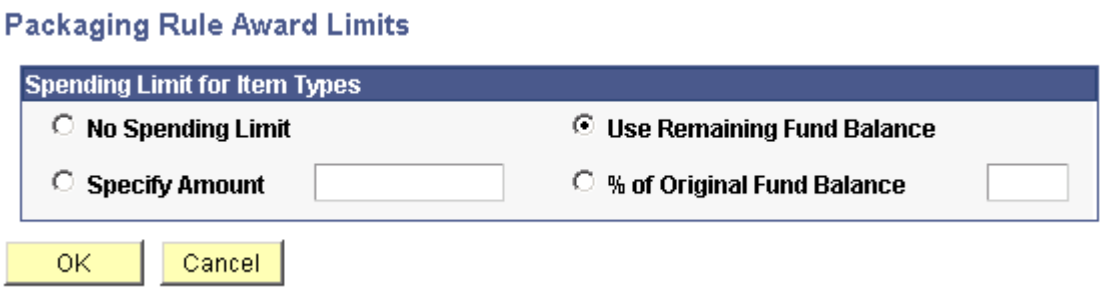
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Field or Control	Description
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

Setting Packaging Rule Award Limits

Access the Packaging Rule Award Limits page (click the **Spending Limit Preferences** link on the Packaging Rules 1 page).

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



Select one of the four options for limiting the total amount awarded for this financial aid item type. The spending limit that you set up here affects this financial aid item type only when it is used in this packaging plan.

Field or Control	Description
No Spending Limit	No fiscal limits are set when awarding this financial aid item type in this packaging plan. By selecting this option, the packaging plan awards as much money as is needed for each student who receives this packaging plan. You can use this option to forecast how much money you would need from this financial aid item type for the upcoming fiscal year. Be extremely careful when you select this option. Use it only when you are running Mass Packaging in simulation mode.
Use Remaining Fund Balance	This is the default value. The financial aid item type can be awarded up to the maximum amount available in the specified fiscal item type fund.
Specify Amount	Enter a fixed dollar amount as the limit to be awarded from this financial aid item type per student.

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Field or Control	Description
% of Original Fund Balance (percentage of original fund balance)	The financial aid item type can be awarded up to the indicated percentage of the available fiscal item type fund balance (not the budgeted, or original, fiscal item type fund balance). For example, you could limit spending for each student for the University Grant to no more than 1 percent of the University Grant's available fiscal balance of 800,000.00 USD. In this example, you would have 8,000.00 USD to award from the University Grant financial aid item type for this student.

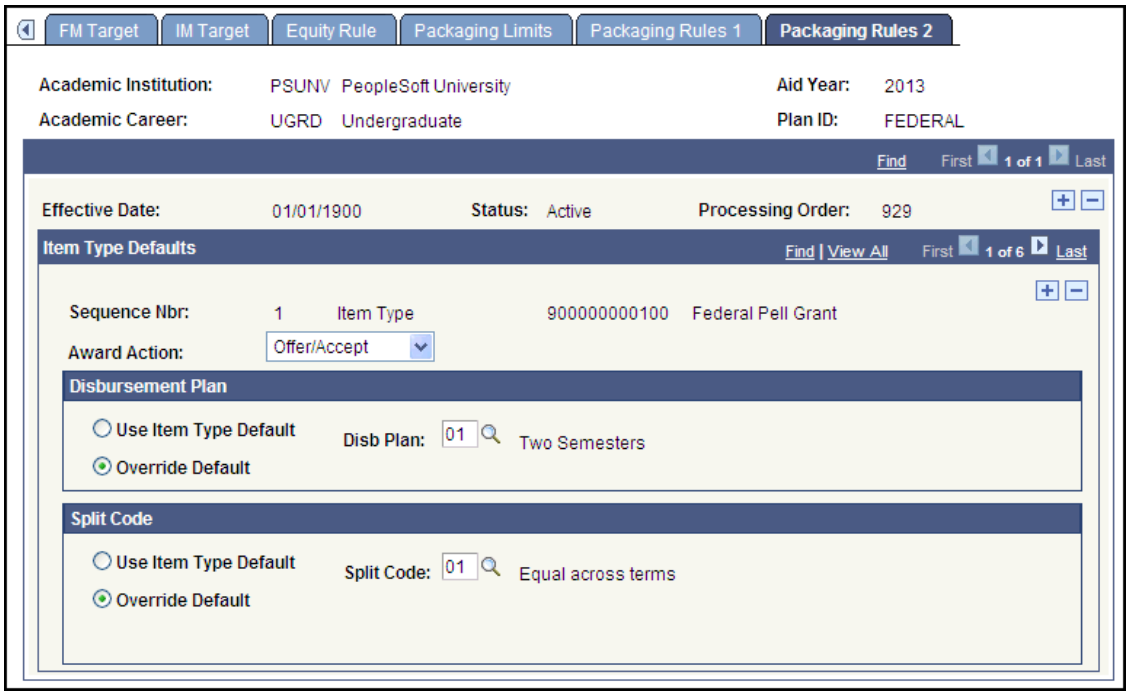
Related Topics

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

Defining Packaging Rules: Award Status, Disbursement Plan and Split Code

Access the Packaging Rules 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Packaging Plan**, and then **Packaging Rules 2**).

This example illustrates the fields and controls on the Packaging Rules 2 page. You can find definitions for the fields and controls later on this page.



You should complete the Packaging Rules 2 page in conjunction with the Packaging Rules 1 page.

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Item Type Defaults

The system identifies the sequence number of the proposed award and whether the packaging rule is for a financial aid item type, related item type group, or gap item type.

Field or Control	Description
Award Action	Enter the default award action that you want the system to use when awarding this financial aid item type to the student. The default award action appears in the **Action** field on the award entry pages for the financial aid item type associated with this packaging rule. *B-Offer/Accept:* The Packaging routine awards this financial aid item type as accepted. Both the **Offered** and **Accepted** fields on the award entry pages are populated with the same amount when the award is made. You may want to use this value for grants and scholarships. *O-Offer:* The Packaging routine awards this financial aid item type as offered only. Only the **Offered** field on the award entry pages is populated when the award is made. The **Accepted** field remains at zero. You must subsequently accept, decline, or cancel this award for future processing. See Awarding Online.

Disbursement Plan

Field or Control	Description
Use Item Type Default	This is the default option. Select to use the default disbursement plan established for this financial aid item type. The system automatically populates the **Disb Plan** (disbursement plan) field on this page with the default disbursement plan specified in the financial aid item type setup.
Override Default	Select to set up a different default disbursement plan for this financial aid item type when used with this packaging plan. You must enter the desired default disbursement plan in the Disb Plan field.
Disb Plan (disbursement plan)	The disbursement plan instructs the system what pattern of disbursement to use for this financial aid item type.

Split Code

In this group box, you can decide whether to use the default disbursement split for this financial aid item type or select a specific disbursement split to use for this financial aid item type in this packaging plan.

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Field or Control	Description
Use Item Type Default	This is the default option. Select to use the default split code established for this financial aid item type. The system automatically populates the **Split Code** field on this page with the default split code.
Override Default	Select this option to set up a different default split code for this financial aid item type when used with this packaging plan. Enter the new default split code in the **Split Code** field.
Split Code	Defines how the award disbursements are split among terms.

> **Note**
>
> The selected split code is used unless the student's enrollment pattern varies from the pattern defined by the chosen split code. In that case, the system returns a custom split code and disbursement plan that match the student's actual enrollment. For example, if the split code divides the award evenly between three quarters of the academic year, but the student is only attending two of the three quarters, the system splits the disbursement between two terms instead of three.

Related Topics

- Defining Default Disbursement Plans and Split Codes
  Access the FA Item Type 5 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 5**).
- Defining Financial Aid Item Types
  To set up financial aid item types, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM).

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8

Setting Up Repackaging

Understanding Repackaging Strategy and Rules

This section lists prerequisites and discusses:

- Repackaging strategy.
- Repackaging students with multiple careers.
- Increase rule.
- Decrease rule.
- Original package plan rule.
- Validate entire package rule.
- Validate item type rule.

Prerequisites

Before using Repackaging plans:

- Create related item type groups.
- Create a flat file to define the repackaging selection population using any flat file editor.
- Create a query to define the repackaging selection population using PS Query.
- Create an equation to define the repackaging selection population as Batch Repackaging Selection (A_SELECT) using the Equation Engine.
- Create an equation to define the repackaging plan assignment population as Fin Aid Packaging Select Eqtns (financial aid packaging select equations) (A_SELECT) using the Equation Engine.
- Review the **Don't Repackage** attribute on Financial Aid Item Types to determine which awards should be excluded from Repackaging. Set the attribute accordingly.

> **Note**
>
> The **Don’t Repackage** attribute does not apply to packaging plans or to repackaging plans that use the “Original Package Plan” repackaging rule.

- Review the default disbursement plan and split code at the financial aid item type level. Repackaging uses this when inserting new or validating existing awards.

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> **Note**
>
> Unlike Packaging, locked awards are always preserved and unchanged for Repackaging. Even if the student is overawarded, the Repackaging process retains a locked award in its entirety.

Repackaging Strategy

Repackaging, or reevaluating awards, maintains a package that adheres to the packaging philosophy of your institution. The objective of the repackaging strategy is to resolve unmet need or need overaward. When additional awards are posted for a student after an original set of awards is established, or when additional funding becomes available, Repackaging can automate the Re-Awarding process.

Factors that may necessitate Repackaging include, but are not limited to:

- Reevaluation of Pell Grant eligibility.
- Update of state awards.
- Receipt of outside scholarships.
- Posting of departmental awards.
- Notification from the Bursar Office.
- Loan Certification Requests.
- Funding increases.
- Attrition.

You can define repackaging rules based on the population being reevaluated. To structure repackaging rules to protect certain awards, use the **Don't Repackage** attribute on the financial aid item type.

> **Note**
>
> The **Don’t Repackage** attribute does not apply to repackaging plans that use the “Original Package Plan” repackaging rule.

The basic repackaging rules and uses are:

Term	Definition
Increase	Insert new awards into the student's existing package to fill unmet need.
Decrease	Reduce one or more awards in the student's package to address an overaward condition.
Original Package Plan	Use the Packaging plan most recently used to repackage this student.
Validate entire package	Reconsider the student's entire set of awards for continued eligibility and award amount.
Validate item type	Reconsider a specific award for the student for continued eligibility and award amount.

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As with Packaging plans, Repackaging plans can include a single rule or a combination of rules. The options and available parameters vary by rule.

Repackaging Students with Multiple Careers

The Mass Packaging and Repackaging processes handle students with multiple careers similarly. For multiple repackaging plans for careers, the order in which these repackaging plans are invoked determines the award outcomes. As part of both repackaging setup and Repackaging processing, you must specify which career or the order of careers to reevaluate.

On the Repackaging Plan setup component, assign the processing order sequentially by career. Then, on the run control options for the Repackaging process, specify the careers that should be repackaged. For example, Career1 RPKG1, Career1 RPKG2, Career2 RPKG1, Career2 RPKG2 might be the order. The system repackages the student for each career based on the processing order associated with the repackaging plan.

> **Note**
>
> If no awards exist on the student's package for a particular career, the student is not repackaged for that career, and the user receives the following message: *9590 - Student has no awards for the specified Academic Career.*

For Auto Repackaging, select the career against which the student will be repackaged and then click the **Repackage** button. If you specify a repackaging plan before clicking the **Repackage** button, the system ensures that the selected plan matches the selected career before repackaging the student. If you do not specify a repackaging plan before clicking the **Repackage** button, the system evaluates the selection criteria and the processing order of the repackaging plan table, and then it processes the student for the first matching repackaging plan for that career. If it does not find an eligible repackaging plan, the student is not repackaged.

Increase Rule

If a student has any remaining unmet need, use this rule to attempt to increase the student's existing package with a specific item type or related item type group. You must designate a default disbursement plan and split code at the FA item type level to repackage the student with this item type.

If the item type being evaluated already exists in the student's original package and the student demonstrates additional eligibility for the item type during repackaging, then a second instance of that item type is awarded. Eligibility includes checking aggregate limits, need determination, and federal eligibility requirements. Posting combines the two instances into a single instance. Posting also assigns attributes from the first (original) instance, such as sequence number, award status, and lock attributes, to the adjusted award. The disbursement plan must match for both instances or posting of the second instance fails. If the disbursement plans match, but the split code differs between the two, a custom split (XX) is posted.

If the item type being evaluated does not already exist in the student's original package and the student demonstrates eligibility for the item type during repackaging, the award is handled as a new award.

If the student does not demonstrate eligibility for the award during repackaging, the award is returned as a 0 USD award with a message describing the failed eligibility.

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You can use the Increase rule to offer additional awards with an award action of *Offer* or *Offer/Accept.* This award action is only available for the Increase packaging rule. (Remember that when the first and second instances of an award are combined during posting, the combined award possesses the attributes of the first instance).

You can use multiple Increase rules in a repackaging plan to increase the student's package. You specify the sequence for these rules within the plan.

At the repackaging rule level, you can target your increase population by specifying a need threshold for the increase to occur. Need threshold can be based on Federal unmet need, Federal unmet Cost of Attendance (COA), Institution unmet need, or Institution unmet COA. For example, if all students who have a sizable unmet need have an increase applied to them, the threshold can be a Federal unmet need amount that is greater than 1,000 USD.

Decrease Rule

Use this rule for overaward situations, either overages in need or COA. You can reduce the student's package based on one of these decrease methods:

- Bottom-Up Reduction. The Repackaging process reduces the student's package by the overaward amount beginning with the highest sequenced award. It processes through to the lowest sequenced award until the student is no longer in an overaward condition. The system might cancel or reduce multiple awards to eliminate the overaward condition.
- Item Type. The Repackaging process reduces the student's package based on the selected item type. If the item type is in the original package, the item type is reduced or canceled based on the overaward amount. If the item type is not in the original package, no reduction occurs.
- Reduce Awards by type/source. The Repackaging process reduces the student's package based on award type, award source, or both. For example, the type might be Loan and the source might be Federal, Institution, State, or Private. The student package is reduced starting with the lowest sequenced award matching the type and source combination through to the highest sequenced award until the student is no longer in an overaward condition. The system might cancel or reduce multiple awards to eliminate an overaward condition.

> **Note**
>
> An overaward condition can exist even after an item type is canceled.

At the repackaging rule level, you can target your decrease population by specifying a need threshold for the reduction to occur. Need threshold can be based on Federal overaward, Federal overaward COA, institution overaward, or institution overaward COA. For example, if all students who are in an overaward condition should have a decrease applied to them, the threshold can be a Federal overaward amount that is greater than zero.

You can choose to reduce or cancel awards below their disbursed amounts by overriding the Disbursement Protection attribute established on the FA Item Type 2 page.

Original Package Plan Rule

Use this rule to repackage the student but maintain the award rules and percentage of awards of the original packaging plan used to package the student. The system reevaluates the

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student's package using the same eligibility rules and limit controls (aggregate, package plan, item type) as used in the packaging plan.

> **Note**
>
> Do not combine other repackaging rules with this rule in a repackaging plan.

If the student was not previously packaged by the Auto Packaging feature or the Mass Packaging feature and no packaging plan ID exists, an attempt to repackage with this rule fails. This error message is sent: Bypassed during Repackaging Process - no assigned Packaging plan found.

You can choose to reduce or cancel awards below their disbursed amounts by overriding the Disbursement Protection attribute established on the FA Item Type 2 page.

For the Original Package Plan rule, the Repackaging process:

- Cancels all awards except those loaded by the External Award process and locked awards.
- Reduces all disbursement protection awards down to the disbursed amount or below if the **Reduce/Cancel Disbursed Amount** check box is selected.
- Repackages the student, reevaluating from lowest sequence number to highest sequence number.

For example, if a student was originally eligible for a Student Education Opportunity Grant (SEOG) because the student filed early and money was available but then during repackaging SEOG funds are no longer available or the student now fails to meet the eligibility criteria, the student is not awarded the SEOG during repackaging unless it is a locked award.

Validate Entire Package Rule

Use this rule to validate all awards contained in the package. This rule is useful when you must ensure continual eligibility and an award amount in the student's package. You can also use this rule when a student receives an external award and you must confirm that the outside scholarship has not created an overaward condition.

If you use this rule, also using an Increase or Decrease rule with need thresholds handles the case in which using this rule results in either an unmet need or an overaward condition.

To reevaluate your students for continued Pell Grant eligibility due to enrollment changes, you must insert a Validate Item Type Rule for your Pell item type. To accomplish this, you must specify two repackaging rules:

- Validate item type = Pell item type
- Validate entire package

This rule processes awards from the lowest sequenced award to the highest sequenced award, and it does not reduce locked awards. It protects external awards and disbursement-protected awards from changes.

Optionally, select the Reduce/Cancel disbursed amount parameter if you want to reduce or cancel awards below their disbursed amounts. This attribute overrides the Disbursement Protection attribute established on the FA Item Type 2 page.

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Validate Item Type Rule

Use this rule to validate any specific item type. To validate more than one item type, insert a rule for each item type in a repackaging plan. If you use this rule, you should also use an Increase or Decrease rule with need thresholds in case the use of this rule results in either an unmet need or an overaward condition.

Before using this rule, ensure that the selected financial aid item type has a default disbursement plan and split code value on the FA Item Type page or Repackaging fails. For example, when validating Pell Grants, you must have an associated default disbursement plan and split code value defined on the FA item type page setup.

To reevaluate your students for continued Pell Grant eligibility due to enrollment changes, you must insert a Validate Item Type rule for your Pell item type.

Setting Up a Repackaging Plan

This section discusses how to:

- Exclude an item type from repackaging.
- Define repackaging rules.

This section also provides examples of repackaging rules.

Pages Used to Set Up a Repackaging Plan

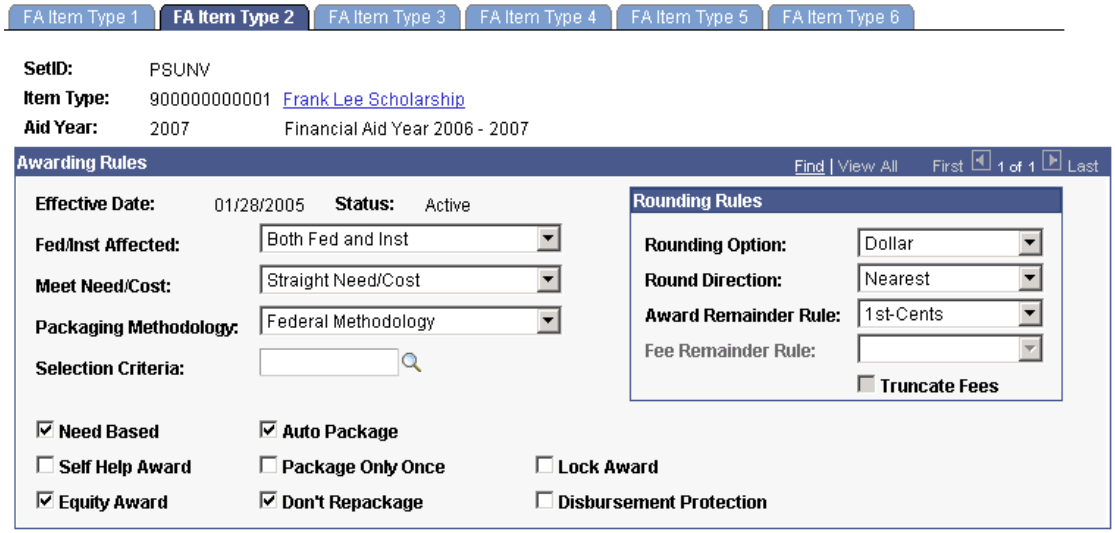
Page Name	Definition Name	Navigation	Usage
FA Item Type 2	ITEM_TYPE_FA_6	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**	Define meet need/cost, packaging methodology, and several lock and rounding attributes.
Repackaging Plan	SFA_RPKG_PLAN_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Repackaging Plan**, and then **Repackaging Plan**	Define repackaging population and rules, and establish the sequence of the repackaging rules. Also, define the repackaging rules within the repackaging plans.

Excluding an Item Type from Repackaging

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

This example illustrates the fields and controls on the FA Item Type 2 page.

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Select the **Don't Repackage** check box if this item type should be protected during repackaging. If this check box is selected, this award is not to be modified during repackaging unless the repackaging rule explicitly includes this item type. Even if this check box is selected, if this item type is specified on the repackaging plan setup, its presence negates the **Don't Repackage** action and exposes the award to repackaging.

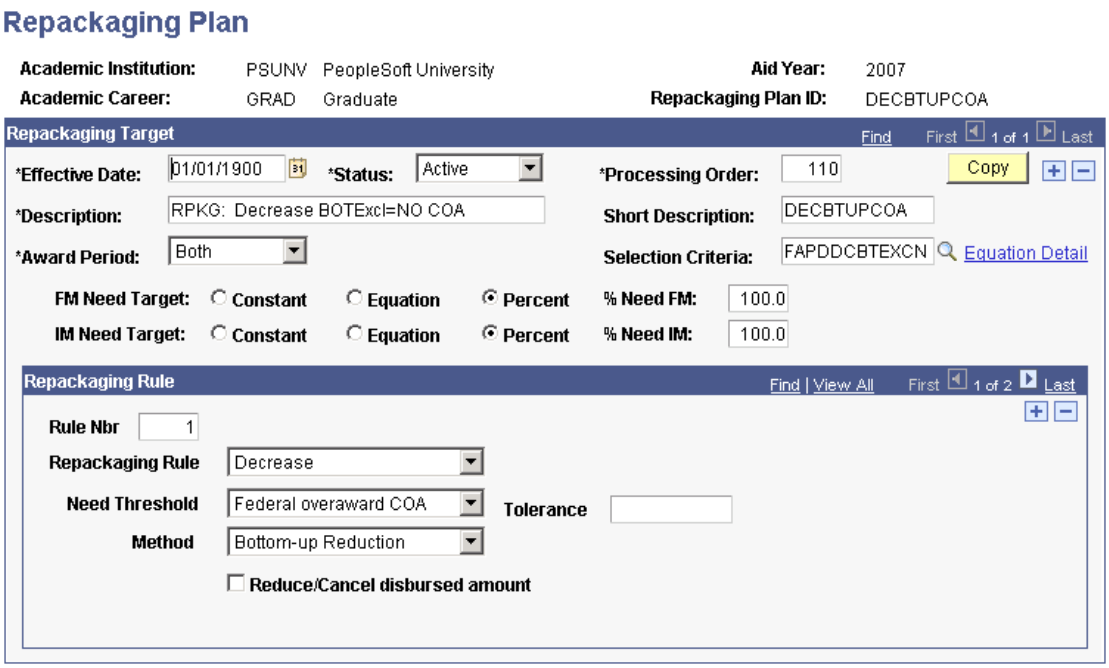
> **Note**
>
> The **Don't Repackage** attribute does not apply to packaging plans or to repackaging plans that use the "Original Package Plan" repackaging rule.

Defining Repackaging Rules

Access the Repackaging Plan page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Repackaging Plan**, and then **Repackaging Plan**).

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

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Repackaging Target

Most of the target fields are similar to the fields used to create packaging plans.

Field or Control	Description
Processing Order	Enter a sequence number to define the order in which batch repackaging and auto select repackaging evaluate the repackaging plan table for selection. When the Repackaging process has many repackaging plans to evaluate, the processing order determines the sequence in which the selected repackaging plans are reviewed, from lowest processing order number to highest.
Award Period	Select a value to define the award periods for which the student is reevaluated during repackaging. Select *Academic, Non-standard,* or *Both.*
Selection Criteria	Select an equation to identify which students are evaluated by this repackaging plan. You have defined these equations as *Fin Aid Packaging Select Eqtns* (A_SELECT) using Equation Engine.
FM Need Target (Federal Methodology need target)	Define the Federal Methodology need to be met during repackaging. Define the target as a constant amount, an equation, or a percent of the student's financial need.
IM Need Target (Institution Methodology need target)	Define the Institution Methodology need to be met during repackaging. Define the target as a constant amount, an equation, or a percent of the student's financial need.

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Repackaging Rule

Field or Control	Description
Rule Nbr (rule number)	Enter a number that indicates the sequence in which this rule is evaluated when you have multiple rules in a repackaging plan. For a single-rule plan, enter *1*.
Repackaging Rule	Select a rule from these values: • *Increase:* Insert new awards into the student's existing package to fill an unmet need. • *Decrease:* Reduce one or more awards in the student's package to address an overaward condition. • *Original Package Plan:* Use the packaging plan most recently used to repackage this student. • *Validate entire package:* Reconsider the student's entire set of awards for continued eligibility and award amount. • *Validate item type:* Reconsider a specific award for the student for continued eligibility and award amount.
Need Threshold	This field appears only for the Increase rule or the Decrease rule. Select a value for the selected rule. For the Increase rule, select one of these values to determine whether the student meets the need threshold: • *Federal unmet need* • *Federal unmet COA* • *Institution unmet need* • *Institution unmet COA* For the *Decrease* rule, select one of these values to determine whether the student meets the need threshold: • *Federal overaward* • *Federal overaward COA* • *Institution overaward* • *Institution overaward COA*
Tolerance	Appears only for the Increase rule or the Decrease rule. Specify the monetary amount for the **Need Threshold** value: • For the Increase rule, if an unmet need exceeds the tolerance amount, the student is evaluated for an increase in funds. • For the Decrease rule, if the overaward exceeds the tolerance amount, the student is evaluated for a reduction in package. If the **Need Threshold** field is left blank (the default value), then the tolerance amount is 0.

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Field or Control	Description
Method	Appears only for the Increase, Decrease, or Validate item type rule. Select a value for the selected rule: • For the Increase rule, select to increase the student's funds by a single *Item Type* or a *Related Item Group*. Corresponding fields that appear define the item type or item type group. • For the Decrease rule, select to decrease the student's funds by reducing awards by *Item Type* or *Bottom-Up Reduction*, or to *Reduce Award by type/source*. *Item Type* reduces specified awards. *Bottom-Up Reduction* reduces awards starting from the last or highest sequence number award. *Reduce Award by type/source* reduces awards that match to specified types, sources, or both. It reduces awards starting from the first or lowest sequence number award. • For the Validate item type rule, select *Item Type* to evaluate a single award. To evaluate more than one item type, insert multiple Validate item type rules into your repackaging plan.
Item Type	Appears only for the Increase, Decrease, or Validate item type rule and the Item Type method. Select a financial aid item type number of award to be evaluated.
Sequence	Appears only for the Increase rule and the Item Type method. Indicate where in the package this item type should be inserted: *First* (lowest sequence number), *Last* (highest sequence number), *Before* a specified item type, *After* a specified item type, or *After need based award*. If no need-based award exists, the award is placed first. Need-based awards are defined by a *Straight Need/Cost* value in the **Meet Need/Cost** field on the FA Item Type 2 page. **Note:** The subsidized loan is a Straight Need/Cost item type and it precedes the unsubsidized loan, a Special Need/Cost item type. If both a subsidized loan and an unsubsidized loan exist in the student's package during a Repackaging increase and the increase sequence is *After need based award*, a new award might be inserted following the subsidized loan because it is the last need-based award. That is, the new award can appear between the subsidized and unsubsidized loan.

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Field or Control	Description
Disbursement Plan/Split Code	Appear only for *Increase* and *Validate Item Type* rules. Enter the Disbursement Plan and Split Code you want to use in this rule. When inserting a new repackaging rule, the values default to the those from FA Item Type for the corresponding career. If left blank, Repackaging uses the values from FA Item Type for the corresponding career. For an *Increase* rule, the system always uses the values entered here, if any. For a *Validate Item Type* rule, Repackaging: • for an *existing non-zero award,* uses the Disbursement Plan/Split Code value tied to the award; • for an *existing canceled Pell Grant award,* uses the Disbursement Plan/Split Code value first from the Repackaging Rule, if populated. Otherwise, it uses the Disbursement Plan/Split Code value from FA Item Type for the corresponding career. **Note:** When the **Repackaging Rule** is *Validate Entire Package* and the award status is either Offered or Offer/Accept, Repackaging uses the Disbursement Plan/Split Code tied to the award and *not* the Disbursement Plan/Split Code tied to the item type.
Minimum	Appears only for the Increase rule. Enter a constant dollar amount or an equation name as the minimum that the Repackaging process should attempt to award.
Maximum	Appears only for the Increase rule. Enter a constant dollar amount or an equation name as the maximum that the Repackaging process should attempt to award.
Limited by	Appears only for the Validate item type rule. Leave it blank, which is the default, to set no limits. Select *Constant* to enter a dollar amount, *Equation* to enter an equation name, or *Original Award* driven by the offered amount or the accepted amount based on the award action tied to the award.
Validate remainder of package	Appears only for the Increase, Decrease, or Validate item type rules and the Item Type method. Select this check box to validate remaining awards from the point of rule to the end of the package. This option does not reduce locked awards. To validate only the selected item type, clear this check box.

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Field or Control	Description
Reduce/Cancel disbursed amount	Appears only for the Decrease, Validate item type, Original Package Plan, and Validate entire package rules. Select this check box to override the Disbursement Protection attribute established on the FA Item Type 2 page and to reduce or cancel awards below their disbursed amounts.
Related Item Group	Appears only for the Increase rule and the Related Item Group method. Select a group of item types previously defined on the Related Item Type Group component (PKG_REL_ITEM_GROUP) to increase a student's package. **Note:** The system can review an unlimited number of item types in a related item group, but it can insert only up to nine new awards into the student's existing package during repackaging. Because the sequence numbers increase in tens, as many as nine numbers can be inserted between existing awards. For example, if sequence 30 is SEOG and sequence 40 is Univ Grant, nine new awards can be inserted between SEOG and Univ Grant (31 through 39) using the Related Item Group method.

Examples of Repackaging Rules

This section shows examples of how these rules are used in a plan to resolve specific situations:

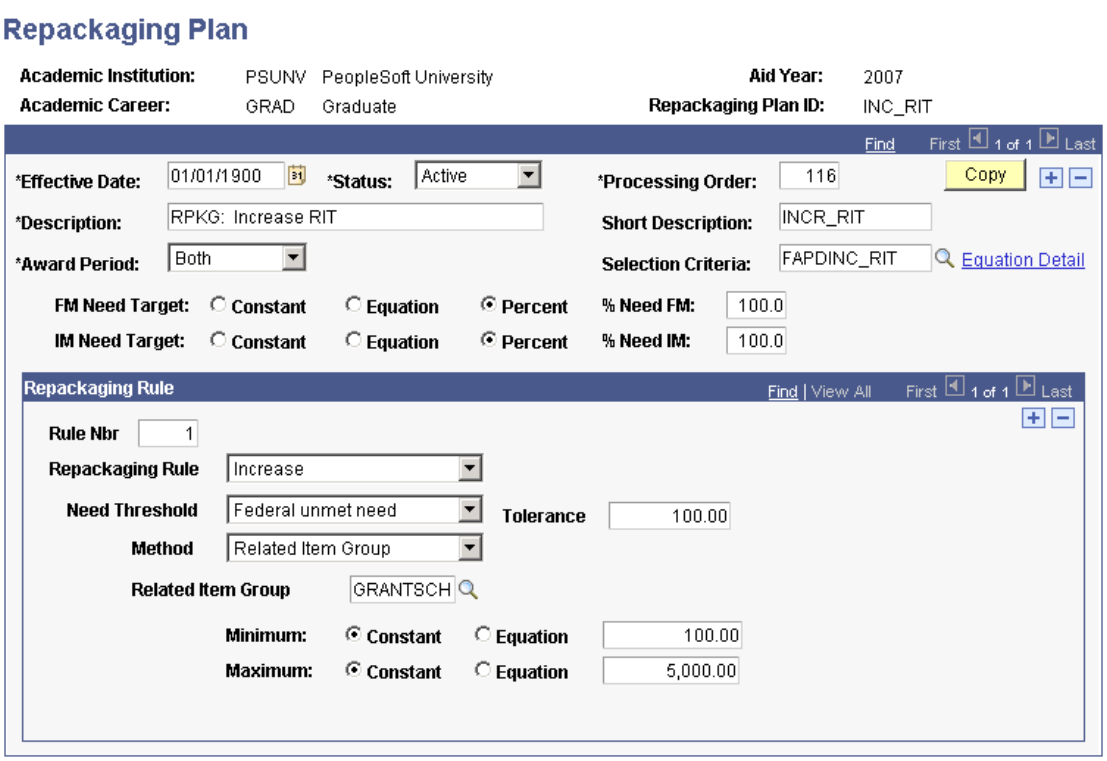
- Increase rule - example 1.
- Increase rule - example 2.
- Multiple Decrease rule.
- Validate item type rule.
- Multirule plan to evaluate the entire package.

Increase Rule - Example 1

Access the Repackaging Plan page and select *Increase* in the **Repackaging Rule** field.

This example illustrates an Increase repackaging rule with a Related Item Group method.

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This example demonstrates how all students with a Federal unmet need greater than 100 USD are evaluated for several grants with the objective of increasing funds in their package by a maximum of 5000 USD.

This table lists key parameters for the Increase rule and describes each parameter:

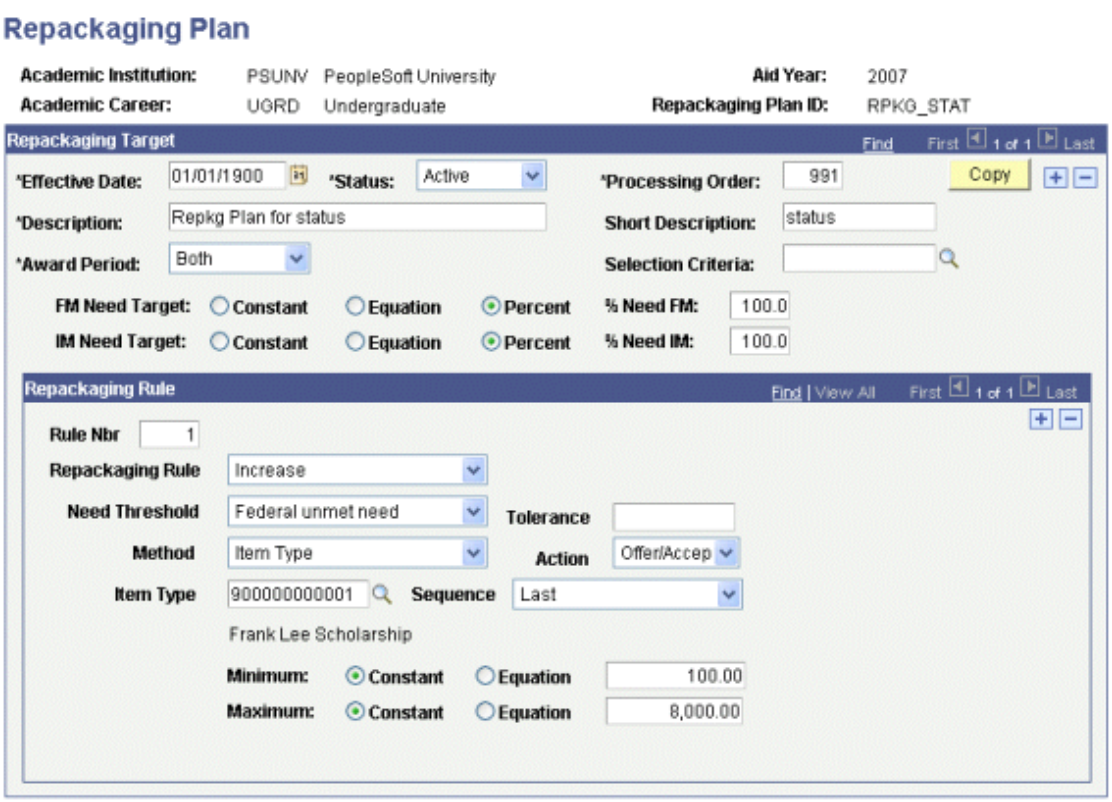
Parameter	Description
Need Threshold and **Tolerance**	Set the target need to be evaluated to a need threshold: *Federal unmet need, Federal unmet COA, Institution unmet need,* or *Institution unmet COA*. Then establish a dollar threshold or Tolerance. For example, you could evaluate all students with a Federal Unmet Need greater than or equal to 2,000 USD.
Method	Insert a single item type or a related item type group. When the method is Item type, specify where to insert the award into the student's package. Note that if the new award follows any Special Need/Cost Item types and unmet need still exists, the Special Need item type fills unmet need before the new item type is evaluated.
Minimum and **Maximum**	Define the award minimum or maximum as a constant dollar amount or an equation.

Increase Rule - Example 2

Access the Repackaging Plan page.

This example illustrates the Repackaging Plan page (Increase rule).

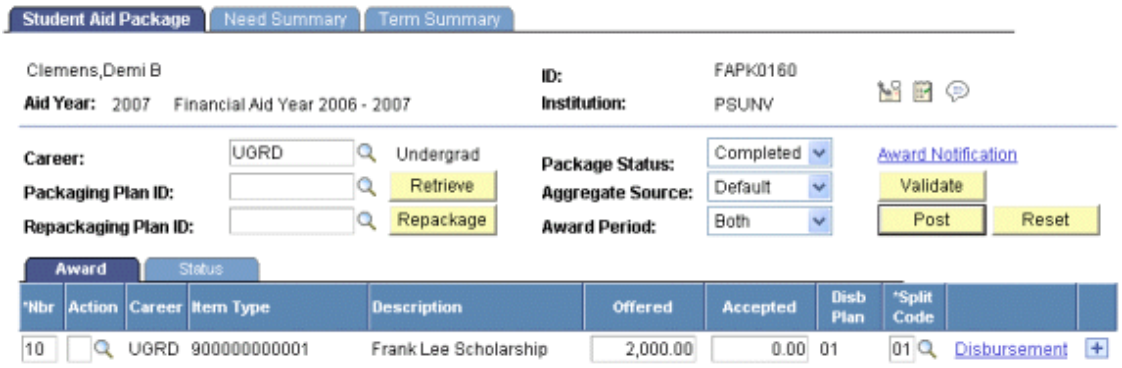
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This example shows a repackaging plan setup to award an additional amount of 8,000 USD, using the Frank Lee Scholarship item type, with an award action of *Offer/Accept.*

Access the Student Aid Package page.

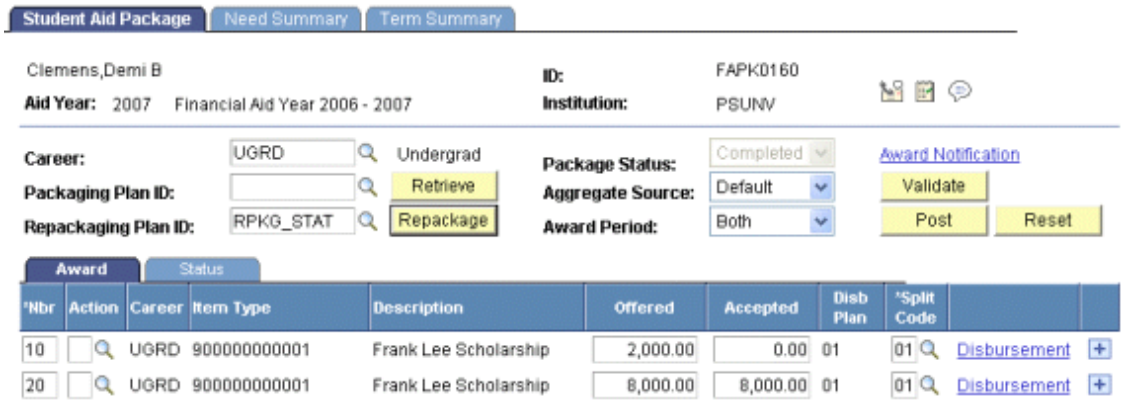
This example illustrates the Student Aid Package page with an award in Offered status.



This example shows that the student has an existing award (Frank Lee Scholarship) for 2,000 USD in *Offered* status.

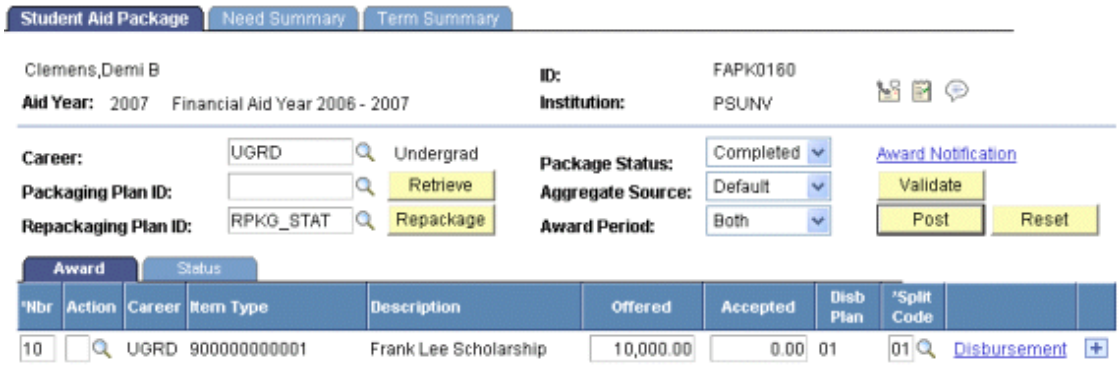
This example illustrates the Student Aid Package page after Repackaging.

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This example shows that the repackaging plan has awarded the student a second instance of the Frank Lee Scholarship for an additional amount of 8,000 USD.

This example illustrates the Student Aid Package page with the combined award after posting.



When you post the awards, the system combines the two instances of the Frank Lee Scholarship item type into a single award of 10,000 USD.

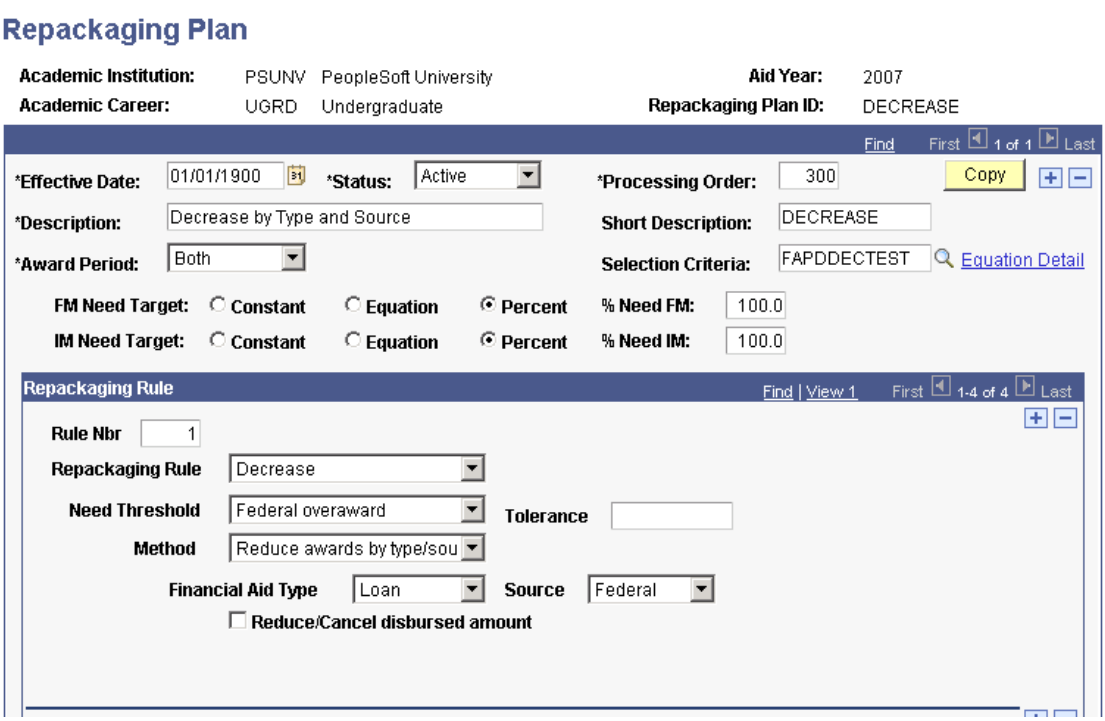
> **Note**
>
> The system sets the final award action to *Offered* status because the first instance of the Frank Lee Scholarship was in *Offered* status.

Multiple Decrease Rule Plan

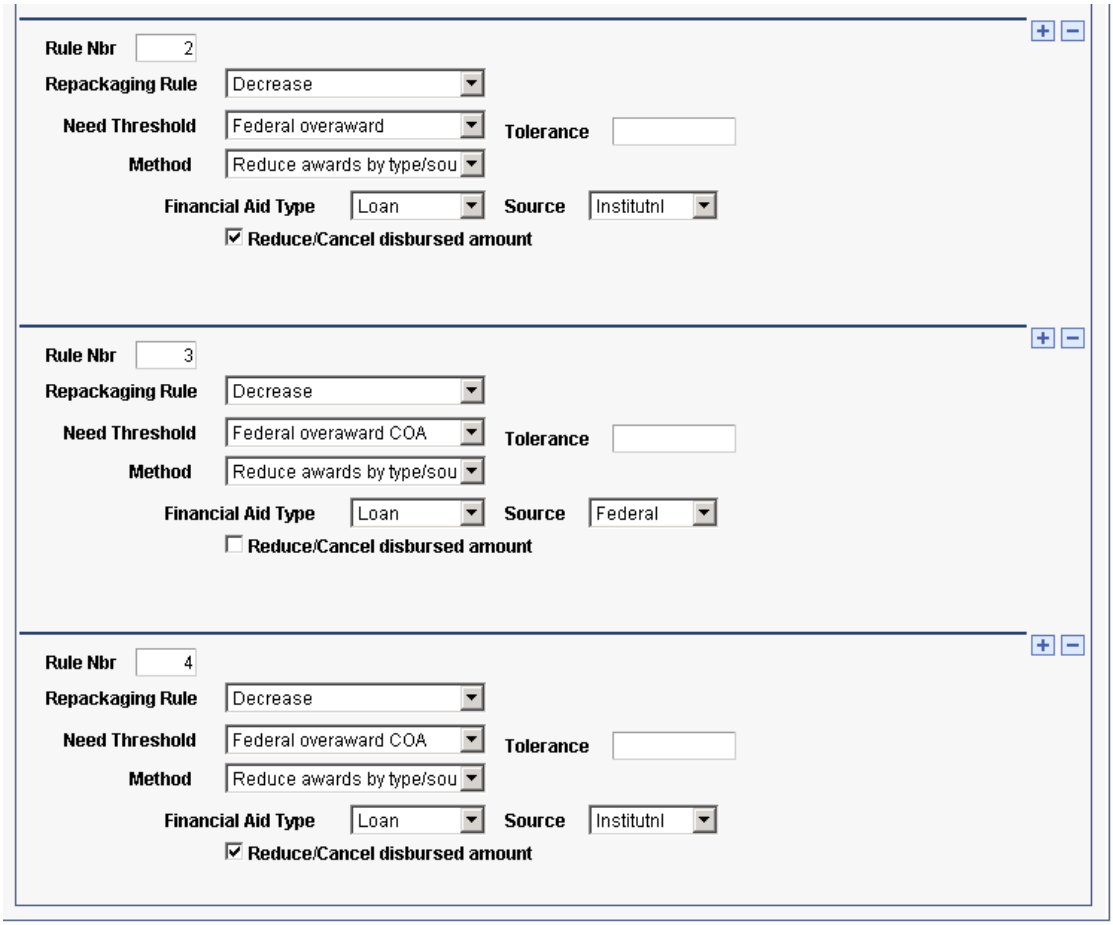
Access the Repackaging Plan page and select *Decrease* in the **Repackaging Rule** field.

This example illustrates the Repackaging Plan page with multiple decrease rules (page 1 of 2).

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Example of the Repackaging Plan page with multiple decrease rules (page 2 of 2)



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In this example, students who meet the criteria defined in the FAPDDECTEST equation are evaluated for a decrease in funding, first by Federal overaward and then by Federal overaward COA. The process evaluates federal loans before institutional loans. Any disbursed amounts are ignored.

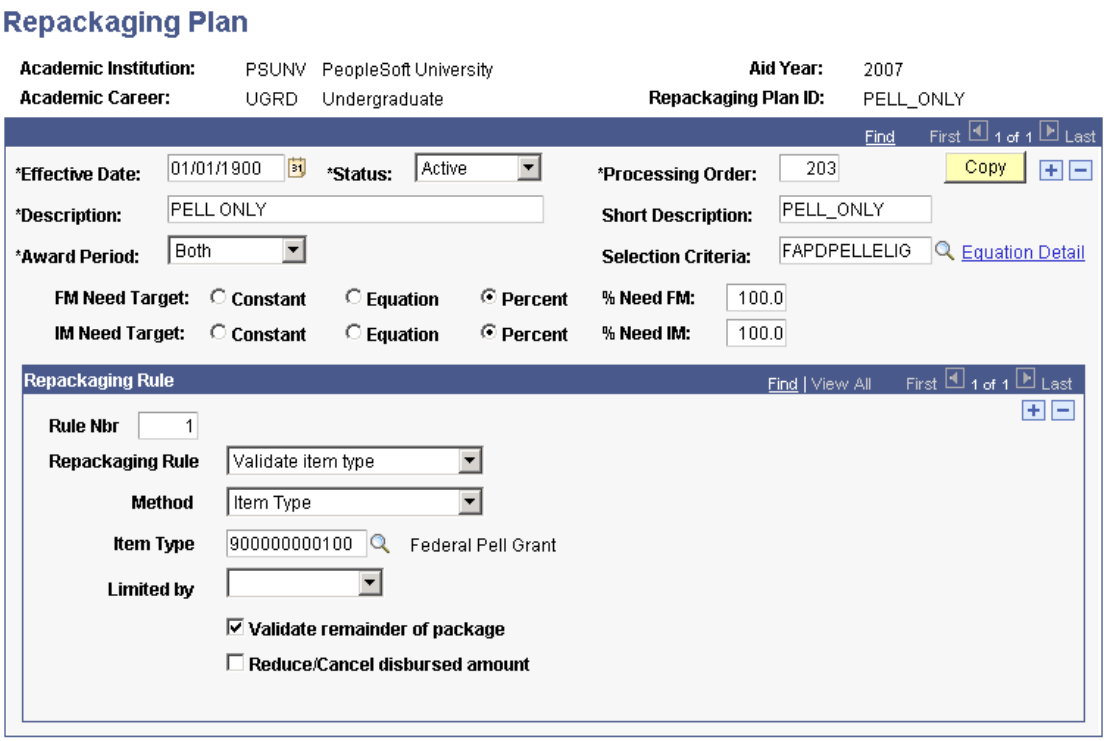
This table lists the Decrease parameters and describes each:

Parameter	Description
Need Threshold and **Tolerance**	Set the target need to be evaluated to a Need Threshold: *Federal overaward, Federal overaward COA, Institution overaward,* or *Institution overaward COA.* Establish a threshold amount in the **Tolerance** field. For example, you could evaluate all students who have an overaward of at least 1 USD.
Method	If you select *Item Type.* you must select an Item Type name. If you select *Reduce awards by type/source,* you can enter a type, a source, or both. Select *Bottom Up* to reduce the student's package by the overaward amount beginning with the highest sequenced award
Reduce/Cancel disbursed amount	Overrides the Disbursement Protection attribute on Financial Aid Item Type Set Up. Use this value if you want to reduce or cancel award amounts below the disbursed amounts.

Validate Item Type Rule

Access the Repackaging Plan page and select *Validate item type* for the repackaging rule.

This example illustrates the Example of the Validate item type rule with an Item Type method.



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In this example, students are reevaluated for eligibility for the Federal Pell Grant. After the Pell Grant is adjusted as needed, the remainder of the package is reevaluated.

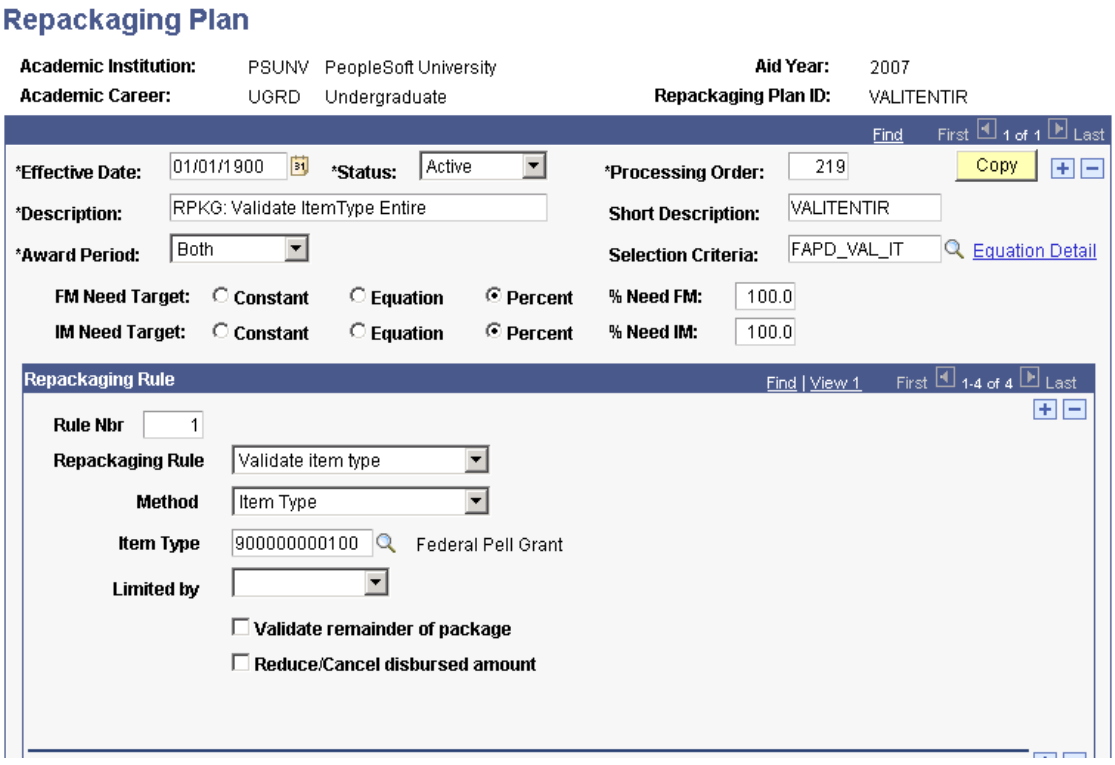
This table lists the appropriate parameters and describes each one:

Parameter	Description
Validate remainder of package	The system works from that point in the repackaging plan of the Validated Item Type rule down through the package.
Reduce/Cancel disbursed amount	Overrides the Disbursement Protection attribute on Financial Aid Item Type Set Up. Use this check box if you want to reduce or cancel award amounts below the disbursed amounts.

Multirule Plan to Validate the Entire Package

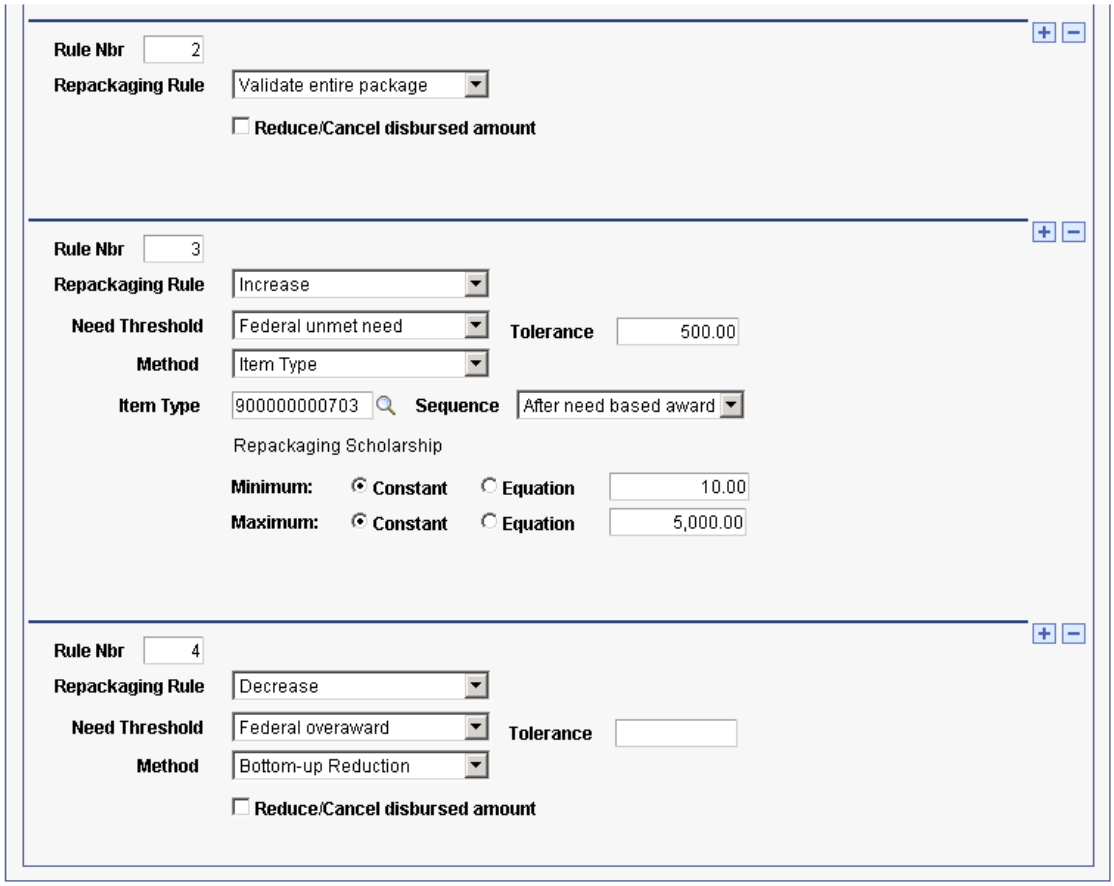
Access the Repackaging Plan page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Repackaging Plan**, and then **Repackaging Plan**).

This example illustrates a multiple-rule Repackaging Plan page (page 1 of 2).



This example illustrates a multiple-rule Repackaging Plan page (page 1 of 2).

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A plan that validates students against their entire package should first validate Pell Grants, then recheck for eligibility, and finally account for overawards because locked awards won't be reduced. That is:

- Rule 1: Validate item type. Specify the item type for Pell Grant to reevaluate the student for a Pell Grant. Based on eligibility criteria, the student might be eligible for the same amount, a higher amount, or a lower amount.
- Rule 2: Validate entire package. This rule checks the student's eligibility and federal need.
- Rule 3: Increase using an item type. This rule ensures that any student who lost a Pell Grant and thereby gained unmet need or who otherwise still had up to 500 USD of unmet need could be evaluated for a Repackaging Scholarship between 10 and 5,000 USD.
- Rule 4: Decrease. Specify the need threshold as Federal overaward and use the bottom-up method. If the student has gained (more) Pell Grant eligibility and, as a result, created an overaward condition, then this rule reduces other awards until the overaward condition is removed. Reduction starts from the bottom up, that is, from the highest sequenced award to the lowest.

Setting Up Repackaging Processing

Before using the Repackaging process:

- Set up context definition.
- Set up selection mapping.

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- Set up a Population Selection PS Query for Need Summary Validation with bind record SFA_BNSV_BIND.
- Set up a Population Selection PS Query for Repackaging with bind record SFA_BRPKGX_BIND or SFA_BRPKG_BIND.
- Define an Equation for Repackaging Population Selection. Define two equations, the first with an application prompt: Fin Aid Packaging Select Eqtns (A_SELECT); and the second with an application prompt: Batch Repackaging Selection (A_SELECT).
- Set up a Population Selection Equation for Repackaging with application prompt: Batch Repackaging Selection.

This section discusses how to:

- Define the context for a repackaging PS Query.
- Set up a population selection PS Query for repackaging.
- Set up a batch repackaging selection using equations.

Pages Used to Set Up Repackaging Processing

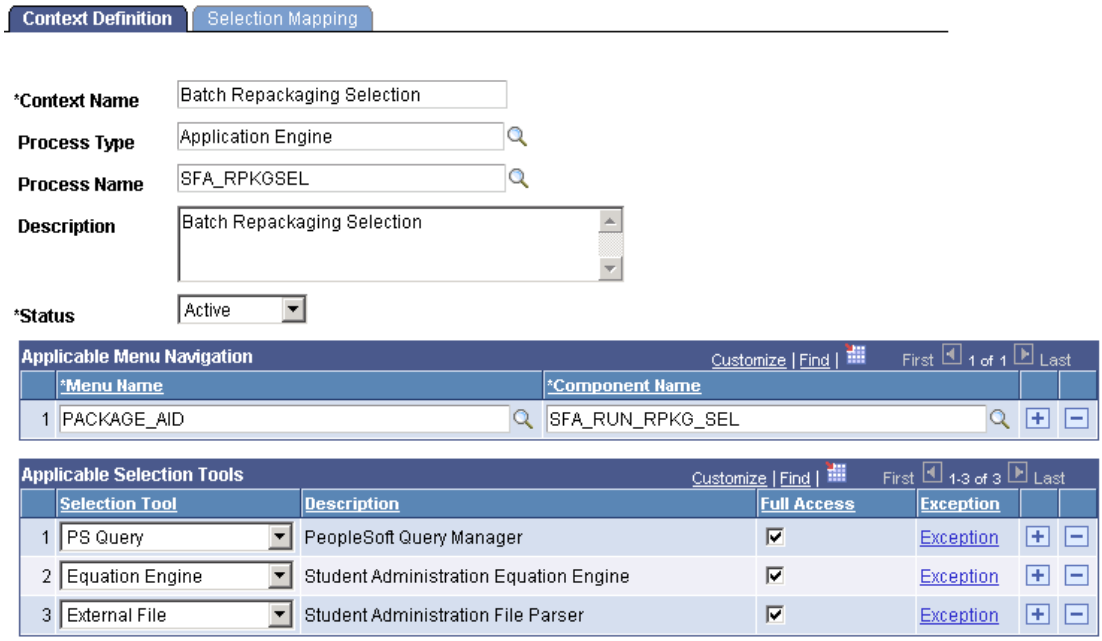
Page Name	Definition Name	Navigation	Usage
Context Definition	SCCPS_CNTXT_DFN	**Set Up SACR**, and then **System Administration**, and then **Utilities**, and then **Population Selection**, and then **Context Definition**, and then **Context Definition**	Define the context for a Repackaging PS Query.
Selection Mapping	SCCPS_CNTXT_MAP	**Set Up SACR**, and then **System Administration**, and then **Utilities**, and then **Population Selection**, and then **Context Definition**, and then **Selection Mapping**	Set up population criteria in a PS Query for Repackaging.

Defining the Context for a Repackaging PS Query

Access the Context Definition page (**Set Up SACR**, and then **System Administration**, and then **Utilities**, and then **Population Selection**, and then **Context Definition**, and then **Context Definition**).

This example illustrates the fields and controls on the Context Definition page.

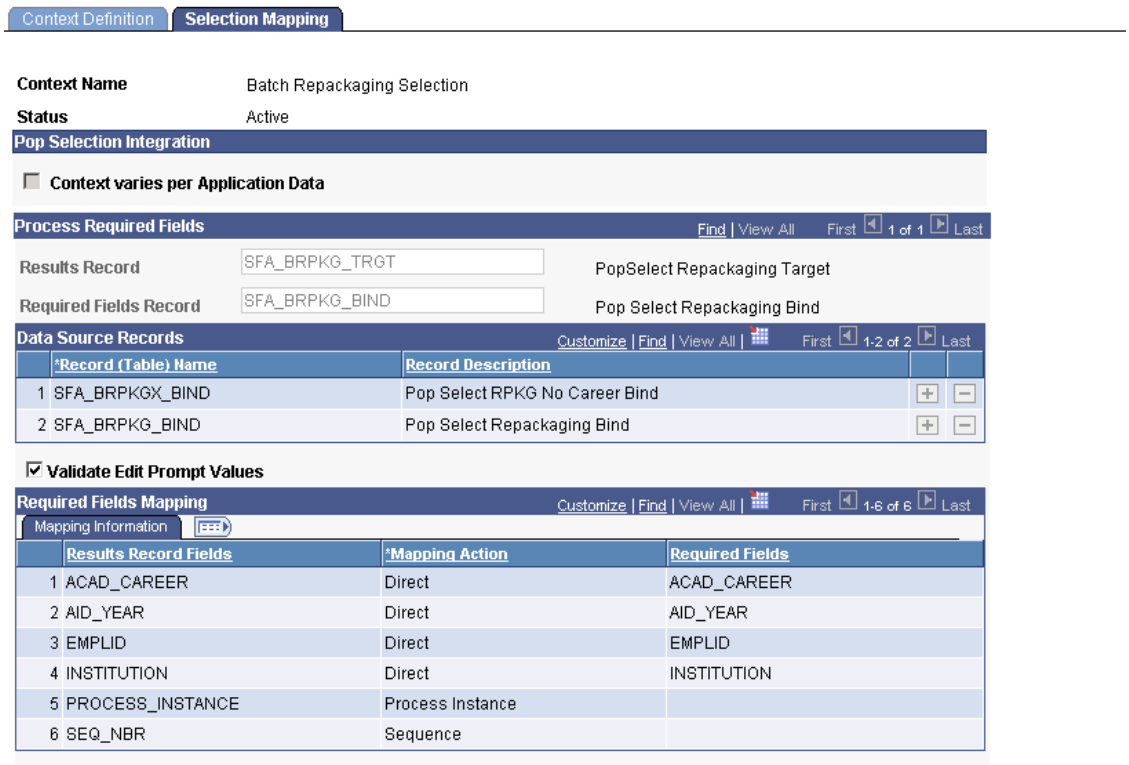
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Setting Up a Population Selection PS Query for Repackaging

Access the Selection Mapping page (**Set Up SACR**, and then **System Administration**, and then **Utilities**, and then **Population Selection**, and then **Context Definition**, and then **Selection Mapping**).

This example illustrates the fields and controls on the Selection Mapping page.



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For a PS Query for repackaging, include INSTITUTION and AID_YEAR as part of the criteria to be used by the Repackaging run control. Your query must include one of the following bind variables:

- *SFA_BRPKGX_BIND,* which does not require a career. Use if your query is not career-dependent.
- *SFA_BRPKG_BIND,* which requires a career. Use if your query is career-dependent.

Related Topics

- Campus Community Fundamentals: Using the Population Selection Process

Setting Up a Batch Repackaging Selection Using Equations

You can set up an equation for batch Repackaging selection in the same way that you set up a population selection PS Query.

Set up any required fields on the equation before using it to select students for batch repackaging. Create two equations, the first with an application prompt: Fin Aid Packaging Select Eqtns (A_SELECT); and the second with an application prompt: Batch Repackaging Selection (A_SELECT). The second equation has a CHOOSE EQUATION command that identifies the first equation. By including this CHOOSE instruction and specifying the application prompt as Batch Repackaging Selection, you can then select it for Batch Repackaging Population Selection.

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9

Setting Up Loan Counseling

Understanding Loan Counseling

There are two different versions of Loan Counseling available in the system, Simple and Expanded, one of which is chosen as part of the Financial Aid Default settings for installation of the system. Understanding Loan Counseling outlines the two versions and how they are used to set up and manage both entrance and exit loan counseling data. Entrance loan counseling data can be used to impact the authorization and disbursement of financial aid.

The Simple version of Loan Counseling allows for the identification and management of loan counseling requirements on an annual basis.

The Expanded version of Loan Counseling allows for the identification and management of loan counseling requirements on either an annual or multi-year assessment basis. In addition, loan counseling requirements can be optionally extended to self-service.

Pages Used for Loan Counseling Setup

Page Name	Definition Name	Navigation	Usage
Financial Aid Defaults	INSTALLATION_FA	**Set Up SACR**, and then **Install**, and then **Financial Aid Installation**, and then **Financial Aid Defaults**	Select Loan Counseling Version for managing loan counseling requirement.
Disbursement Rules: Item Type - Indicators	DISB_RULE_ITM1	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Types Rules**, and then **Indicators.**	Indicate if Item Type requires an entrance interview.
NLSDS OPEID Cross Reference	SFA_OPEID_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **NLSDS OPEID Cross Reference**	Map the incoming OPEID on the NSLDS Exit Loan Counseling file to the correct Institution.
COD Routing ID Cross Reference	SFA_COD_ID_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **COD Routing ID Cross Reference**	Map the incoming Routing ID on the COD file to the correct Institution.

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Page Name	Definition Name	Navigation	Usage
Define Loan Type	SFA_LN_CNSL_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **Define Loan Counseling Options**, and then **Define Loan Type**	Define loan-counseling requirements by loan type.
Loan Counseling	SFA_LN_CNSL_SETUP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **Define Loan Counseling Options**, and then **Loan Counseling**	Define the entrance and exit interview URLs and associated attribute
Loan Counseling Search/Match Parameters	SFA_LN_SRCHMCH	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **Set DL Loan Counseling Search Match**	Define search and match criteria for use when processing both COD Entrance Loan Counseling and NSLDS Exit Loan Counseling data files.

Selecting the Loan Counseling Version

Access the Financial Aid Defaults page (**Set Up SACR**, and then **Install**, and then **Financial Aid Defaults**, and then **Financial Aid Installation**).

> **Note**
>
> For a complete description of this page:

See Establishing Defaults.

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Field or Control	Description
Loan Counseling Version	Select which version of Loan Counseling for use throughout the system. This selection controls what components of Loan Counseling are available and how Authorization and Disbursement processing evaluates entrance loan counseling requirements to release funds for disbursement. This selection also controls how loan counseling is displayed on the Packaging Status Summary page. • *Simple* – Select to limit the management of loan counseling to annual evaluation and processing. This is the default value. • *Expanded* – Select to enable multiple loan counseling setup options: annual , multiple aid year, and student self-service,

Selecting an Item Type Loan Entrance Interview Disbursement Requirement

Access the Disbursement Rules: Item Type - Indicators page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Types Rules**, and then **Indicators**).

> **Note**
>
> For a complete description of this page:

See Defining Item Type Disbursement Rules.

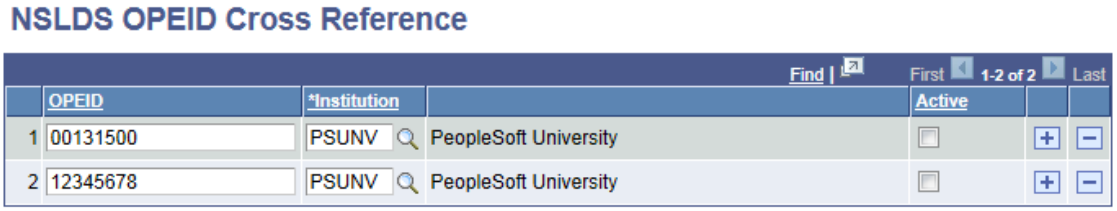
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Field or Control	Description
Loan Entrance Intervw Reqloan entrance interview required	Select this check box to have the authorization process determine whether a student must complete loan entrance counseling for awards of this item type. If your school selects a Loan Counseling Version of *Simple* in the Financial Aid Defaults setup, the authorization process checks the student's NSLDS history for a prior Stafford, Direct, or Supplemental Loan for Students (SLS) loan. If the system finds a record, it authorizes the item type for disbursement. If no prior loan history exists, the student is assumed to be a new borrower, and the Loan Entrance Interview Status field on the Packaging Status Summary component is checked for the student's current status. If your school selects a Loan Counseling Version of *Expanded* in the Financial Aid Defaults setup, the authorization process reviews the student's loan counseling history on the Loan Counseling page to determine whether the student has satisfied the requirement. See Managing Loan Counseling Data.

Mapping the OPEID and COD Routing ID to Institutions

Access the NSLDS OPEID Cross Reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **NLSDS OPEID Cross Reference**).

This example illustrates the fields and controls on the NSLDS OPEID Cross Reference page.



Use this page to map the incoming OPEID on the NSLDS Exit Loan Counseling file to the correct Institutions.

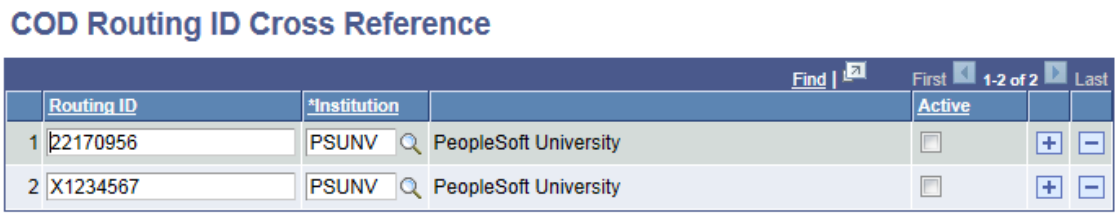
Field or Control	Description
OPEID	Enter an OPEID. The OPEID must be 8 alphanumeric characters, and is the combination of the 6 digit school code and the 2 digit school (branch) location code.

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Field or Control	Description
Active	Select this check box to activate the OPEID/ Institution combination. This check box is checked (activated) by default when a new row is added. This option is used by the batch process to know which mapped values to use.

Access the COD Routing ID Cross Reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **COD Routing ID Cross Reference**).

This example illustrates the fields and controls on the COD Routing ID Cross Reference page.



Use this page to map the incoming Routing ID on the COD file to the correct Institutions.

Field or Control	Description
Routing ID	Enter a Routing ID. The Routing ID must be 8 alphanumeric characters. If necessary, pad the Routing ID with leading zeros to reach 8 numeric characters.
Active	Select this check box to activate the Routing ID/ Institution combination. This check box is checked (activated) by default when a new row is added. This option is used by the batch process to know which mapped values to use.

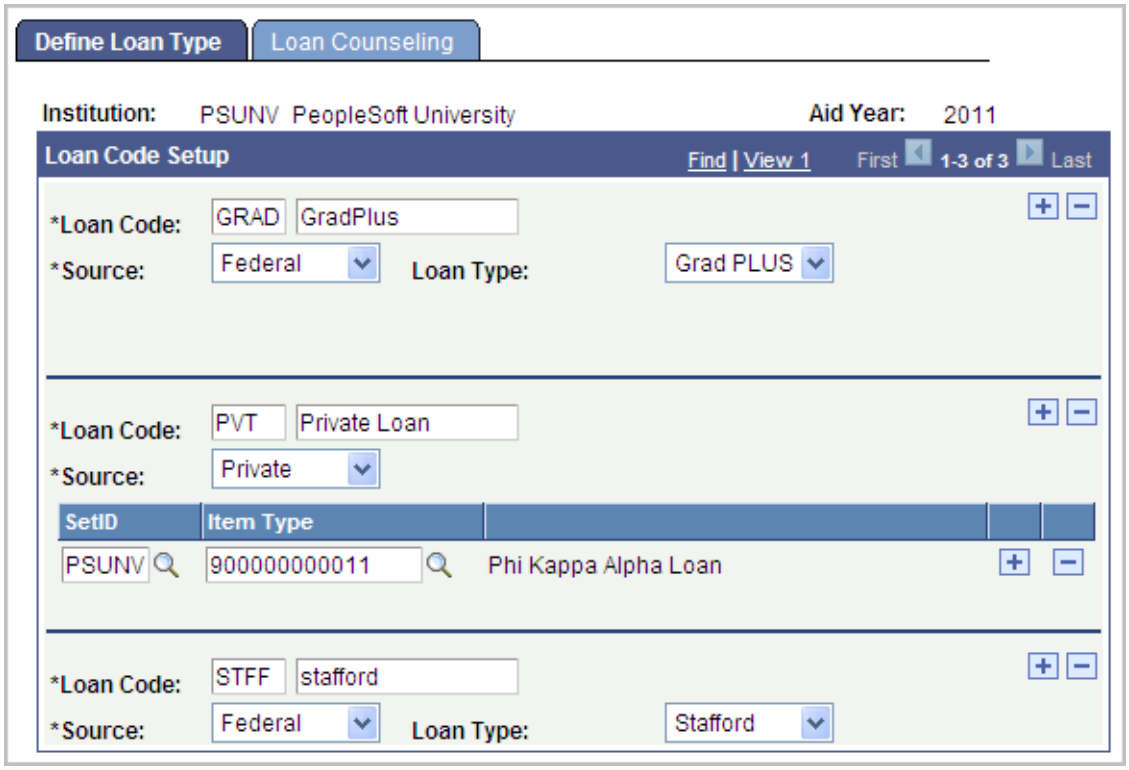
Defining Loan Counseling Types

Access the Define Loan Type page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **Define Loan Counseling Options**, and then **Define Loan Type**).

Use the Define Loan Type page to define types of loan counseling based on similar repayment options, interest rates, payment schedules, or other borrowing requirements.

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

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Field or Control	Description
Loan Code	Enter a user-defined name and description for a group of loans that have the same loan counseling requirements.
Source	Select the funding source. If you select *Federal,* also select the *Loan Type,* such as Stafford, Perkins, Grad PLUS or PLUS. If you select *Institutnl, Private,* or *State,* also select the *SetID* and *Item Type.*
Loan Type	If you select Federal as a **Source,** select a Loan Type. Selection of a **Loan Type** of *Stafford* applies loan counseling requirements to financial aid item types with a Federal ID of Subsidized or Unsubsidized. This unifies Stafford loan counseling requirements for Subsidized and Unsubsidized Stafford awards.

Specifying Loan Counseling Attributes

Access the Loan Counseling page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **Define Loan Counseling Options**, and then **Loan Counseling**).

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

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Entrance Interview Requirement

> **Note**
>
> You can only select **Multi Year** *or* **Annual**; not both.

Field or Control	Description
Multi Year	Select if a loan-counseling entrance interview is required only once.

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Field or Control	Description
Annual	Select if a loan-counseling entrance interview is required each aid year that the student borrows this type of loan.
Entrance Counseling URL	Enter URL to display in Self Service.

Exit Interview Requirement

> **Note**
>
> It does not matter if you select Multi Year or Annual for the Exit Interview Requirement. The selection has no direct impact to the Exit Interview functionality.

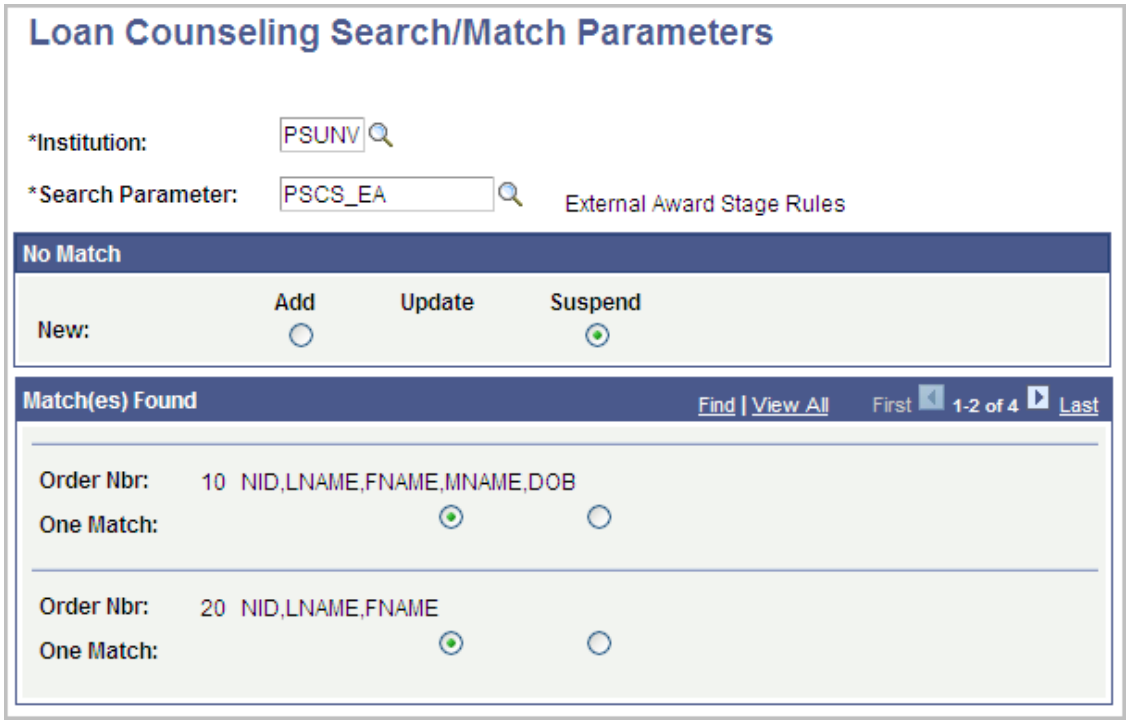
Field or Control	Description
Exit Counseling URL	Enter URL to display in Self Service.
Use Default Exit Date	Select this check box to specify the default exit date for activating your exit interview URL. If this check box is selected, the **Exit Date Calculation Choice** is displayed. If it is not selected, the **Exit Date** is displayed.
Exit Date Calculation Choice	Select the number of days from the exit or program completion date to start displaying the exit interview link to students. If you select **Multi-Year,** the system uses the student's graduation date to calculate the number of days based on the Exit Date Calculation Choice value. For example, if the value is 15 and the graduation date is June 30, the link will appear on June 15. If you select **Annual,** the system uses the last day of the term and subtracts the value in the Exit Date Calculation Choice check box. For example, if the value is 15 and the last day of the term is June 15, the link will appear on May 30.
Exit Date	Enter or select the calendar date on which to start displaying the exit interview link. This field displays when **Use Default Exit Date** is not selected.

Defining Search/Match for Loan Counseling Data Import

Access the Loan Counseling page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Counseling**, and then **Set DL Loan Counseling Search**).

This example illustrates the fields and controls on the Loan Counseling Search/Match Parameters page. You can find definitions for the fields and controls later on this page.

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Both the Process COD Counseling Data and Process Exit Counseling Data processes use the Search/Match parameters to determine whether an existing ID in the database matches a record in the corresponding staging tables. The following table lists the limited search fields specific to counseling data.

Data Field	Search Field Rule
National ID	NationalIDRule
Last Name	LastNameSrchRule
First Name	FirstNameSrchrule
Middle Initial	MiddleNameRule
Date of Birth	DateOfBirthRule

> **Note**
>
> Search Field Rule "MiddleNameRule" must be defined to only search on the first character.

Field or Control	Description
No Match	Select *Add* or *Suspend* as the action when no match is found.
Match(es) Found	Starting from the lowest search order, select *Update* or *Suspend* as the action to take when a match is found. In this example, 10 is the lower and most restrictive search rule.

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Related Topics

- Campus Community Fundamentals: Understanding Search/Match

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10

Setting Up CommonLine 4 Loans

Prerequisites for Setting Up CommonLine 4 Loans

Before you can set up CommonLine 4 loans, you must define general financial aid processing defaults. On the Financial Aid Defaults page (INSTALLATION_FA), select the **FFELP Serial MPN Activation** (federal family educational loan program serial master promissory note activation) check box in the Activation Indicators group box if your school participates in serial MPN processing.

Related Topics

- Establishing Defaults
  To set up defaults for Classic and Fluid interfaces, use the Installation Defaults (INSTALLATION_FA) and Aid Processing Rule Setup (FA_DFLT_RULE_SET) components.

Setting Up Loan Participants

To set up loan participants, use the Maintain Lender Codes component (LENDER_LOAD_MAINT), Define School Lenders component (LOAN_LENDER_TABLE), Maintain Guarantor Codes component (GUAR_LOAD_MAINT), Define School Guarantors component (LOAN_GUAR_TABLE), Maintain Loan Servicer Codes component (SRVCR_LOAD_MAINT), and Define School Servicers component (LOAN_SERVICE_TABLE).

This section provides an overview and discusses how to:

- Add or update lender information.
- Identify lenders as loan participants.
- Update guarantor information.
- Identify guarantors as loan participants.
- Add or update servicer information.
- Identify servicers as loan participants.

> **Note**
>
> You must enter all loan servicers in both CommonLine 4 setup components and Common Record CommonLine (CRC) setup components until loan servicers transition from CommonLine 4 to the newer CRC protocol.

Understanding Loan Participants

Participants in the loan process include lenders, guarantors, and loan servicers. To streamline the loan process, identify all loan participants and understand their electronic loan processing

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requirements and agreements with your institution. The loan participants tables are not institution or aid-year specific.

Pages Used to Set Up Loan Participants

Page Name	Definition Name	Navigation	Usage
Lender Load Maintenance	LENDER_LOAD_MAINT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Lender Codes**, and then **Lender Load Maintenance**	View, update, or add lender information for your institution. This page is the main repository of lender information maintained by the institution.
Lender Electronic Address	(search)	Click the **Electronic Address** link on the Lender Load Maintenance page.	View or enter the mailbox type (internet or private communication network) and mailbox ID (internet address).
Lender Contact Information	LNDR_LD_CNT_SEC	Click the **Contact Address** link on the Lender Load Maintenance page.	View or update additional information about lender contacts.
Edit Address	OE_ADDR_USA_SEC	Click the **Edit Address** link on the Lender Load Maintenance page.	Edit or update address information.
Loan Lender Table	LOAN_LENDER_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Define School Lenders**, and then **Loan Lender Table**	Add lenders by copying them from the Lender Load Maintenance table. This page contains all lenders from the Lender Load Maintenance table that process loans for your institution.
Lender Electronic Address	(search)	Click the **Electronic Address** link on the Loan Lender Table page.	Edit or update electronic addresses.
Lender Contact Information	LEND_ADDR_SEC	Click the **Contact Information** link on the Loan Lender Table page.	Edit or update lender contact information.
Lender Information	LOAN_LENDER_INQ	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **View CL4 Lenders**, and then **Lender Information**	Review lender information.

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Page Name	Definition Name	Navigation	Usage
Guarantor Load Maintenance	GUAR_LOAD_MAINT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Guarantor Codes**, and then **Guarantor Load Maintenance**	View, update, or add guarantor information for your institution. This page is the main repository of guarantor information maintained by the institution.
Loan Guarantor Table	LOAN_GUAR_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Define School Guarantors**, and then **Loan Guarantor Table**	Identify the guarantors that your institution uses for processing loans. You can add guarantors by copying them from the Guarantor Load Maintenance table.
Guarantor Contact Information	GUAR_ADDR_SEC	Click the **Contact Address** link on the Loan Guarantor Table page.	View or enter additional information about guarantor contacts.
Guarantor Electronic Address	(search)	Click the **Electronic Address** link on the Loan Guarantor Table page.	Edit or update electronic addresses.
Guarantor Contact Information	GUAR_ADDR_SEC	Click the **Contact Address** link on the Loan Guarantor Table page.	Edit or update guarantor contact information.
Servicer Load Maintenance	SRVCR_LOAD_MAINT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Loan Servicer Codes**, and then **Servicer Loan Maintenance**	View, update, or add servicer information for your institution. This page is the main repository of servicer information maintained by the institution.
Loan Servicer Table	LOAN_SERVICE_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Define School Servicers**, and then **Loan Servicer Table**	Identify the servicers that your institution uses for processing loans and add new servicers. You can add servicers by copying them from the Servicer Load Maintenance table.
Servicer Electronic Address	(search)	Click the **Electronic Address** link on the Loan Servicer Table page.	Edit or update electronic addresses.

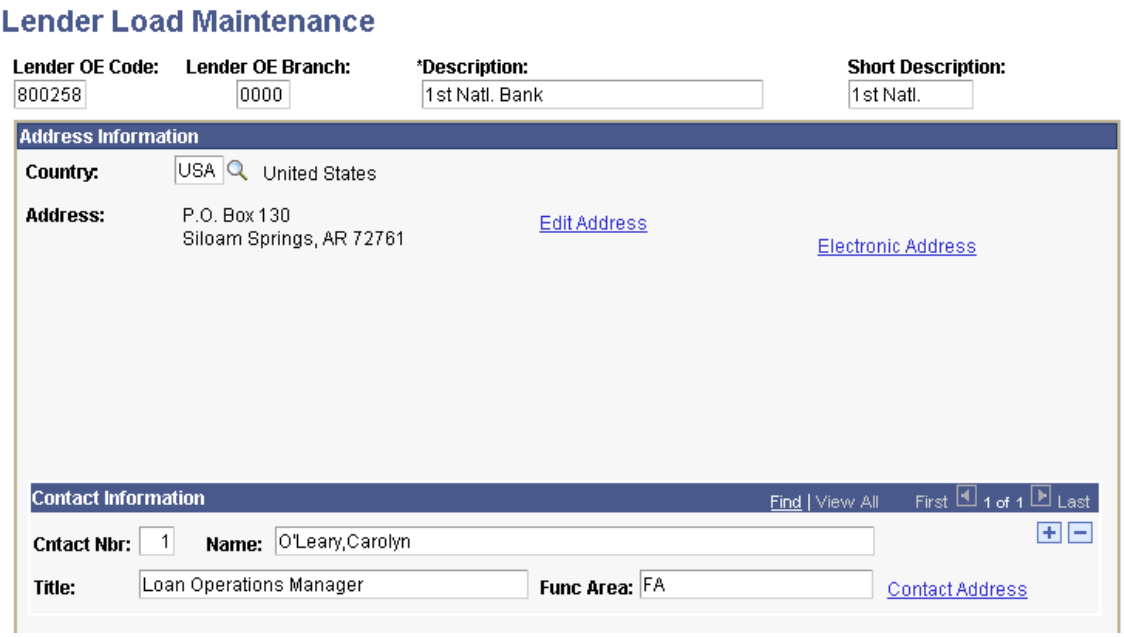
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Page Name	Definition Name	Navigation	Usage
Servicer Contact Information	SERV_ADDR_SEC	Click the **Contact Information** link on the Loan Servicer Table page.	Edit or update servicer contact information.
Servicer Information	LOAN_SERVICE_INQ	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **View CL4 Loan Servicers**, and then **Servicer Information**	Review information about the loan servicers that you set up on the Loan Servicer Table page.

Adding or Updating Lender Information

Access the Lender Load Maintenance page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Lender Codes**, and then **Lender Load Maintenance**).

This example illustrates the fields and controls on the Lender Load Maintenance page. You can find definitions for the fields and controls later on this page.



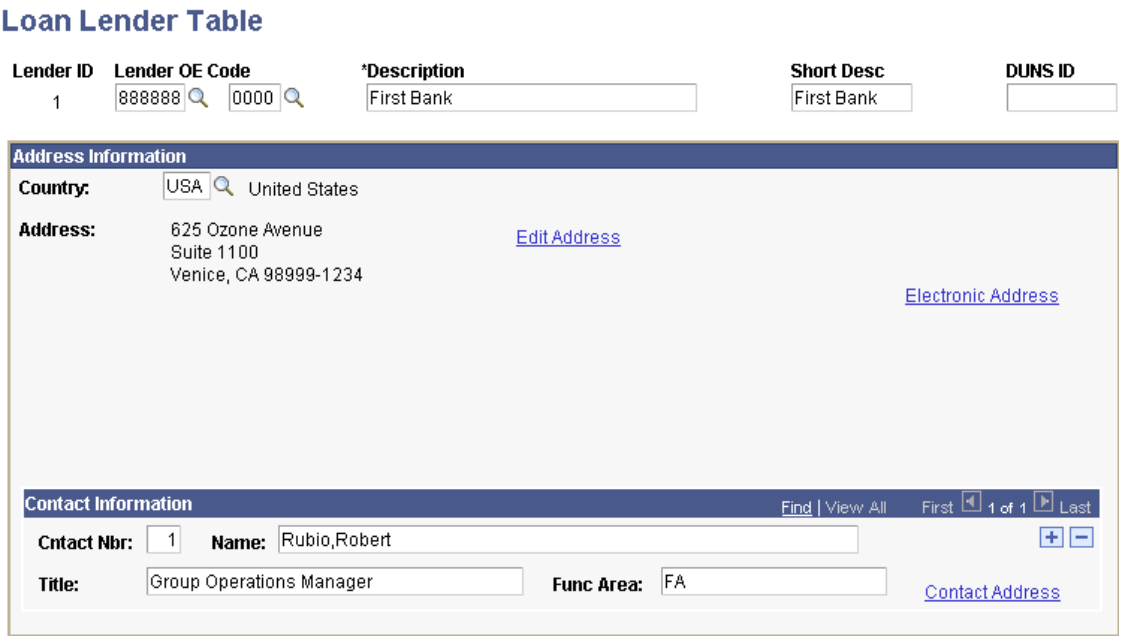
Field or Control	Description
Edit Address	Click to edit or update an address.
Electronic Address	Click to edit or update an electronic address.
Contact Address	Click to edit or update a contact address.

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Identifying Lenders as Loan Participants

Access the Loan Lender Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Define School Lenders**, and then **Loan Lender Table**).

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



Field or Control	Description
Lender ID	Displays the ID assigned by the system to the lender associated with the loan.
Lender OE Code (lender office of education code)	Select a lender office of education code. When you select a lender office of education code, the system uses data from the lender load maintenance database and automatically populates the rest of the information.

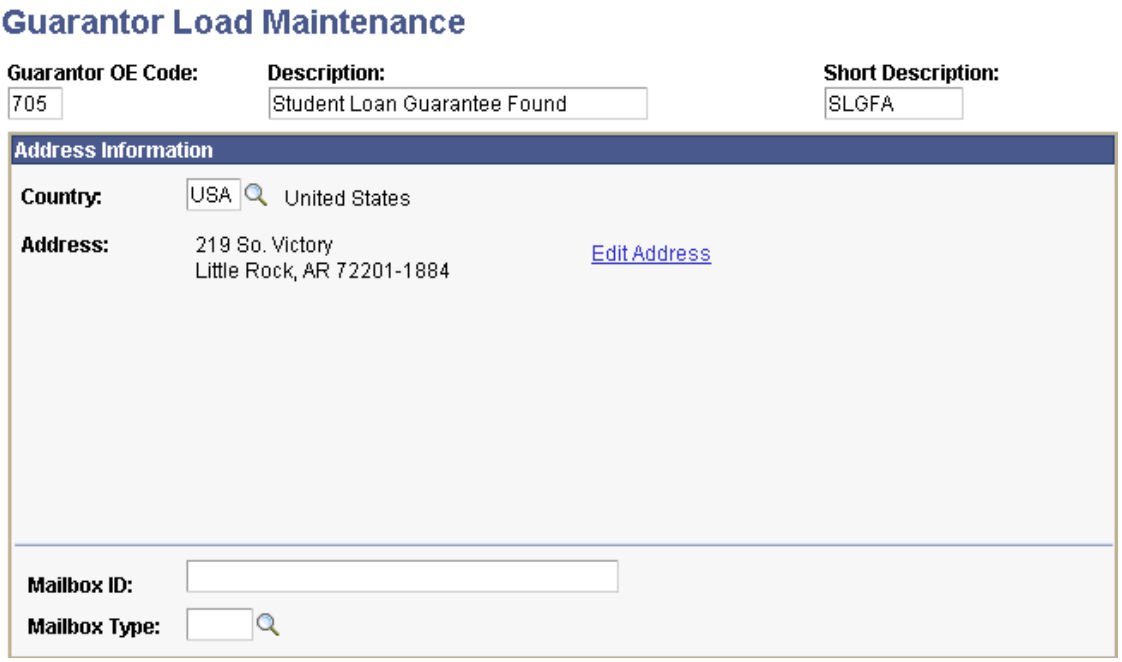
To add a lender to the Lender Load Maintenance table, complete the fields manually.

Updating Guarantor Information

Access the Guarantor Load Maintenance page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Guarantor Codes**, and then **Guarantor Load Maintenance**).

This example illustrates the fields and controls on the Guarantor Load Maintenance page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Mailbox ID	Enter mailbox identification. The mailbox ID is the address where data files are sent when the files are transmitted using the internet or a private communication network.
Mailbox Type	Select an internet provider or communication network.

Identifying Guarantors as Loan Participants

Access the Loan Guarantor Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Define School Guarantors**, and then **Loan Guarantor Table**).

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

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To add new guarantors, you must first define them on the Guarantor Load Maintenance page.

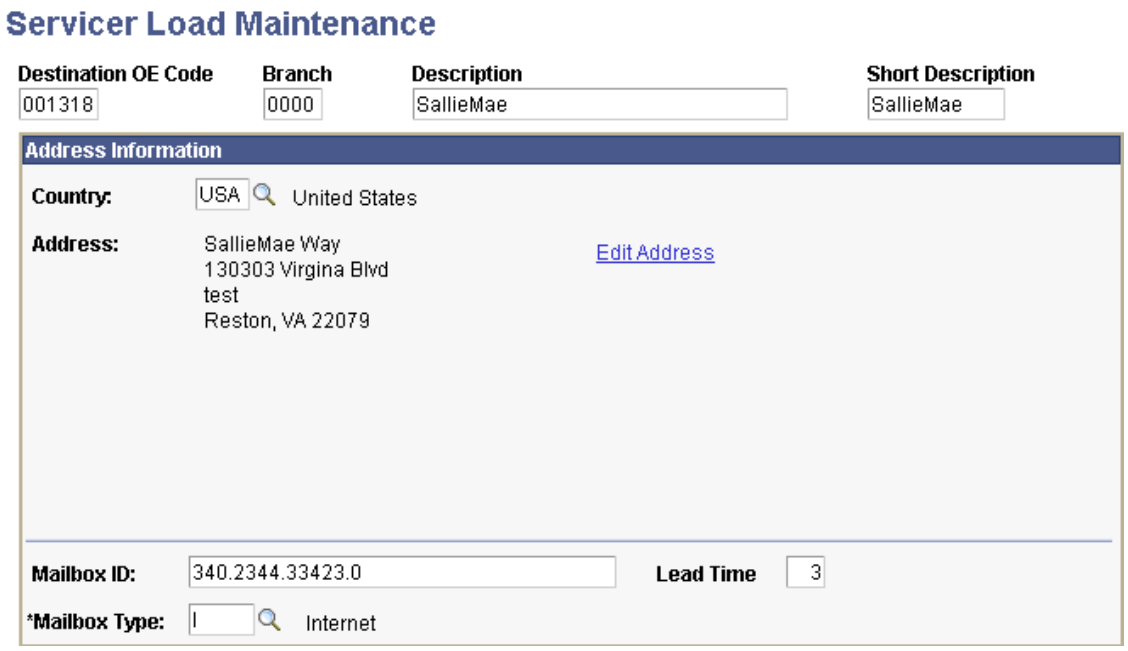
Field or Control	Description
Guar ID (guarantor identification)	Displays the number assigned by the system to identify the guarantor for loan processing. The system delivers the majority of guarantor codes.
OE Cd (office of education code)	Select an office of education code. When you select an office of education code, the system automatically populates the rest of the fields with information from the Guarantor Load Maintenance table.
Edit Address	Click to update or review address information.
Electronic Address	Click to update or review electronic address information.
Contact Address	Click to update or review contact address information.

Adding or Updating Servicer Information

Access the Servicer Load Maintenance page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Loan Servicer Codes**, and then **Servicer Loan Maintenance**).

This example illustrates the fields and controls on the Servicer Load Maintenance page. You can find definitions for the fields and controls later on this page.

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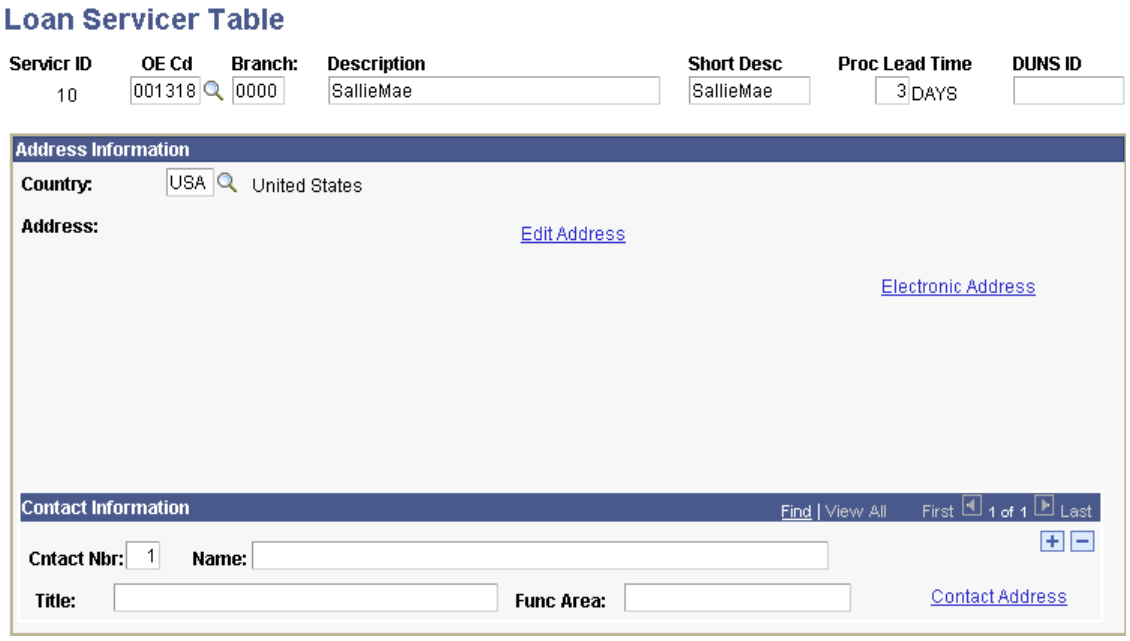
Field or Control	Description
Destination OE Code (destination office of education code)	Select an office of education code. When you select an office of education code, the system automatically populates the rest of the fields with information from the Guarantor Load Maintenance table.
Lead Time	Enter the number of days prior to the first disbursement date that changes can still be made to the student's loan before the data is sent to the school. This is for information purposes only.
Edit Address	Click to update or review address information.

Identifying Servicers as Loan Participants

Access the Loan Servicer Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Define School Servicers**, and then **Loan Servicer Table**).

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

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Field or Control	Description
Servicer ID (servicer identification)	Displays the number used to identify the servicer associated with the requested loan.
OE Cd (office of education code)	Select an office of education code. When you select an office of education code, the system automatically populates the rest of the fields with information from the Servicer Load Maintenance table.
Proc Lead Time (process lead time)	Enter the number of days that a loan destination needs to freeze its data to prepare for a transfer to the school. For example, if the lead time is five days, changes can be made to the student's loan only five days prior to the first disbursement.
Edit Address	Click to update or review address information.
Electronic Address	Click to update or review electronic address information.
Contact Address	Click to update or review contact address information.

To add a servicer that is not included on the Servicer Load Maintenance table, complete the fields manually.

Setting Up Loan Types

To set up loan types, use the Create Loan Types component (LOAN_TYPE).

This section discusses how to:

- Define loan types.
- Link CommonLine loan types with National Student Loan Data System (NSLDS) loan history information.

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- Assign loan checklists.

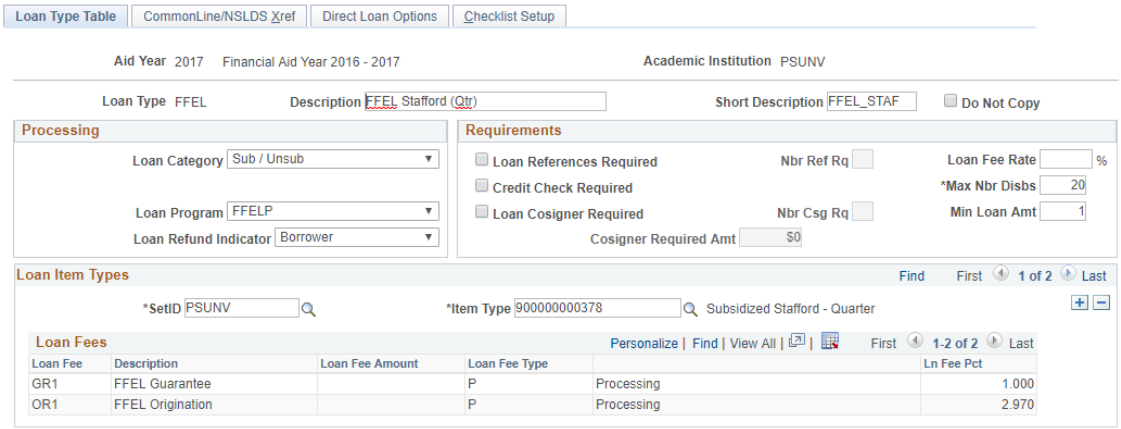
Pages Used to Set Up Loan Types

Page Name	Definition Name	Navigation	Usage
Loan Type Table	LOAN_TYPE_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Loan Type Table**	Define the types of loans that your institution uses in the loan origination processes.
CommonLine/NSLDS Xref	LOAN_TYPE_TABLE2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **CommonLine/NSLDS Xref**	Link loan types defined for CommonLine processing with the borrower's loans reported by the NSLDS.
Checklist Setup	LOAN_TYPE_DOCUMENT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Checklist Setup**	Assign a checklist to be generated when a loan is originated.

Defining Loan Types

Access the Loan Type Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Loan Type Table**).

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



When you set up a loan financial aid item type, you include specific conditions for processing the loan. You must complete the Loan Type Table page to complete the setup.

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Field or Control	Description
Do Not Copy	Select this option to prevent the Loan Type from being copied during the Aid Year Rollover process.

Processing

Field or Control	Description
Loan Category	Select from *Alt Loan* (alternative loan), *PLUS, Sub/Unsub* (subsidized/unsubsidized), *Subsidized,* and *Unsubsidized.* If you select *PLUS,* a **Graduate PLUS Indicator** check box displays. Select the check box for Grad PLUS loans.
Loan Program	Select from *Alternative, Direct, FFELP, Health, Perkins, State,* and *University.* For example, to set up Stafford loans processed through CommonLine, you might specify the loan category as Sub/Unsub and the loan program as FFELP. To set up an alternative loan program processed through CommonLine, specify the loan category as *Alt Loan* (alternative loan), and the loan program as *Alternative.*
Loan Refund Indicator	Select from: *Borrower:* Select to have the borrower of the loan receive any refunds or overage. For example, the borrower would be a parent or guardian for a PLUS loan. *Student:* Select to have the student to receive any refunds from the loan. You can override this field at the loan application level. Note that additional setup is required in Student Financials to generate refunds to the proper recipient.

Requirements

The system enforces the selected requirements during loan validation when utilizing the corresponding loan edit.

Field or Control	Description
Loan References Required	Enter reference information on the Promissory Note Plus and Promissory Note Alt pages and Loan Origination components (SFA_CRC_ORIG). Enter the number of references required in the **Nbr Ref Rq** (number of references required) field.
Loan Cosigner Required	If you select this check box, enter the number of cosigners required in the **Nbr Csg Rq** (number cosigners required) field.

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Field or Control	Description
Cosigner Required Amount	Enter the minimum loan amount that requires a cosigner. Enter cosigner information on the Promissory Note Plus and Promissory Note Alt pages and Loan Origination components (SFA_CRC_ORIG). Note that this requirement is enforced by the loan servicer and not the loan validation process.
Loan Fee Rate	Enter the loan fee rate to print on the promissory note for this loan type. Ensure that the loan fee rate matches the loan fee setup for the item type that you associate with this loan type.

Loan Item Types

Field or Control	Description
SetID	Select a setID and an item type. You can associate multiple item types with the same loan type. You cannot share item types across multiple loan types. For example, to define FFELP Stafford loans, enter the subsidized and unsubsidized item types.

> **Note**
>
> Based on the business processes defined by your institution, you might need to create multiple loan types for the same loan program.

The system displays the loan fee, description, loan fee amount, loan fee type, and loan fee percent for the item type selected. These values are associated with the item type when you set up the financial aid item type on the Loan Fee Table page.

Related Topics

- Attaching Loan Fees
  Access the FA Item Type 6 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 6**).

Linking CommonLine Loan Types to NSLDS Loan History Information

Access the CommonLine/NSLDS Xref page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **CommonLine/ NSLDS Xref**).

This example illustrates the fields and controls on the CommonLine/NSLDS Xref page. You can find definitions for the fields and controls later on this page.

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When you originate a CommonLine loan, the system uses the information set up on this page to search for similar loans in the borrower's NSLDS history. If a prior loan is found, the system uses the prior loan information to derive the new loan's destination. This optional feature can be set up in the Loan Institution setup page.

Field or Control	Description
Alternative Loan Type Cd (alternative loan type code)	The system uses this code to notify loan agencies about the type of alternative loan. Alternative loan codes are assigned by NCHER.
NSLDS Loan Type	Select a loan type to translate the NSLDS loan type that is defined in the NSLDS tables.

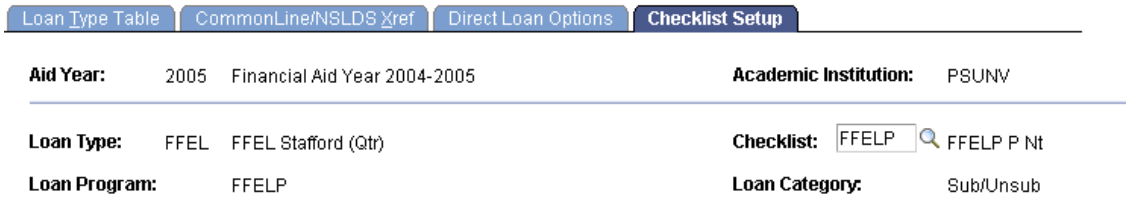
For more information, see www.ncher.us

Assigning Loan Checklists

Access the Checklist Setup page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Checklist Setup).**

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

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The values for the **Loan Type, Loan Program,** and **Loan Ctgry** (loan category) fields are based on the aid year and academic institution that you selected to access the page.

Field or Control	Description
Checklist	Select a checklist to be generated at the time the loan is originated. **Note:** The system does not generate checklists for direct loans during origination. It generates checklists after you run the promissory note process.

Setting Up Loan Validation Edits

To set up loan validation edits, use the Maintain Loan Edits component (LN_EDITS) and Create Loan Edit Set component (LN_EDIT_DFLTS).

This section provides an overview and discusses how to:

- Define validation edit messages.
- Create loan validation edit sets.

Related Topics

- Campus Solutions Application Fundamentals: Understanding Equation Engine

Understanding Loan Validation Edits

Loan edits verify that the loan origination data is valid for transmission to the receiving loan agency. All CommonLine 4 loan validation edits must be defined in the Loan Edits/Message Table page. Financial Aid delivers a core set of edits to be used during loan validation. All CommonLine 4 loan edits are equations written using the Equation Engine. You can use the Equation Engine to create or modify equations to support loan agencies that are not defined as a CommonLine standard.

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Pages Used to Set Up Loan Validation Edits

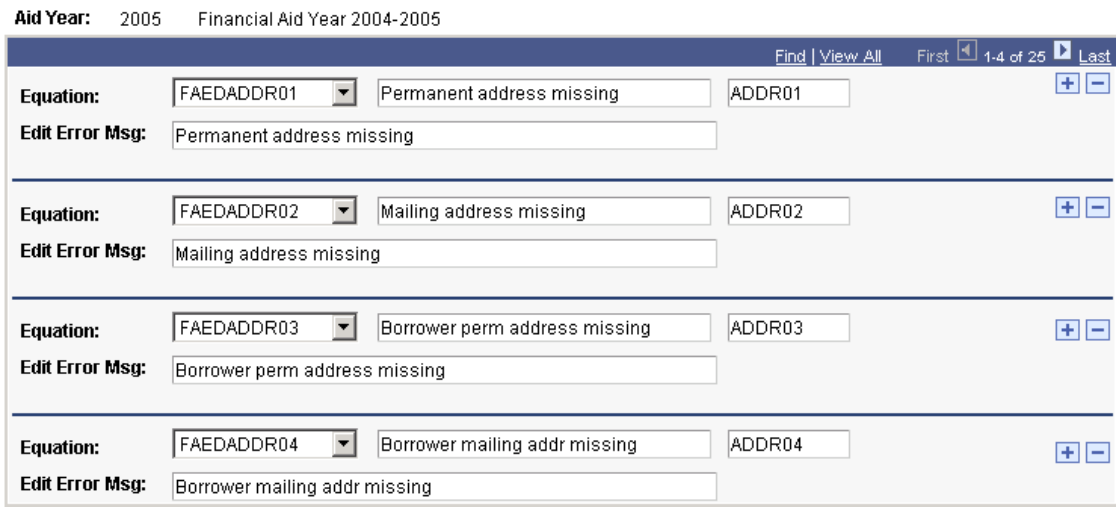
Page Name	Definition Name	Navigation	Usage
Loan Edits/Messages	LN_EDIT_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Loan Edits Loan Edits/Messages**	View delivered edits and error messages used in loan validation. You must correct all loan errors before loan data can be selected for outbound processing. You can modify the message text.
Loan Edit Defaults	LN_EDIT_DFLTS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Edit Sets**, and then **Loan Edit Defaults**	Create loan validation edit sets that are used when constructing loan destination profile records. Loan edit default sets are logical sets of edits that can be carried out based on aid year, loan program, loan category and process level. After they are added to a loan destination, you can further modify the edit sets to function according to the loan destination's business rules.

Defining Validation Edit Messages

Access the Loan Edits/Messages page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Maintain Loan Edits Loan Edits/Messages**).

This example illustrates the fields and controls on the Loan Edits/Messages page.

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This page comes preloaded with updated edit error messages as needed. New loan edits created with the Equation Engine must be added to this page for the loan validation process to use them. Use the **Equation** field to select an Equation Engine equation.

The Loan Orig Edit Errors (loan origination edit errors) page in the Originate Loan component displays any edit errors encountered during the loan origination process.

This table describes the predefined errors:

Equation	Description	Cause	Resolution
FAEDADDR01	Permanent address missing.	Used for alternative/ PLUS loans. A valid permanent address cannot be found for the student. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.
FAEDADDR02	Mailing address missing.	Used for alternative/ PLUS loans. A valid mailing address cannot be found for the student. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.

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Equation	Description	Cause	Resolution
FAEDADDR03	Borrower perm address missing.	A valid permanent address cannot be found for the borrower. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address to the borrow ID that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.
FAEDADDR04	Borrower mail address missing.	A valid mailing address cannot be found. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.
FAEDBORROW01	Loan borrower not defined.	Used for alternative/ PLUS loans. The Borrower ID field in the Maintain Originated Loans component (SFA_CRC_ORIG) is blank.	Enter the correct borrower ID.
FAEDCHNG01	Loan increase with undisbursed check.	Used for change transactions. A post-disbursement change transaction is generated and an undisbursed check exists for the loan.	Disburse the funds to the student account or return the funds to the lender.
FAEDCOSIGN01	No cosigners - cosigners required.	Used primarily for alternative loans. If cosigners are required for the loan type, the edit verifies that the required number of cosigners exist in the Relationships page for the student and are assigned to the loan.	Add the missing cosigners in the Relationships page and Maintain Originated Loans component.
FAEDCOSIGN02	Cosigner signature required.	Used primarily for alternative loans. Co-signer signatures have not been entered in the Promissory Note Alt and Promissory Note Plus tracking pages.	Revise the data on the Promissory Note Plus page or the Promissory Note Alt page.

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Equation	Description	Cause	Resolution
FAEDDEBT01	Total student loan debt required.	Used for alternative loans. The total loan debt on the Originate Loan component is zero, and NSLDS loan history exists.	Update the total loan debt in the Originate Loan component using the Loan Demographic Data page.
FAEDDEPSTAT1	Dependency Status missing.	The student's federal dependency status was missing when the loan was originated.	Use the Loan Demographic Data page to update the dependency status in the Originate Loan component.
FAEDDEST01	Loan destination is zero (missing).	The loan destination is not assigned after the loan has been originated. This edit is always carried out by the loan validation process and cannot be deactivated.	Assign a loan destination in the Loan Origination 1 page.
FAEDDISBDT01	Disbursement more than 90 days after loan period end.	A disbursement date is set for greater than 90 days beyond the loan period end date.	Change the date on the Loan Origination 2 page.
FAEDDISBDT02	Disbursement date earlier than 13 days of loan period start.	The first disbursement precedes the loan period begin date by more than 13 days. This may only be replicated by originating a new loan. An online edit prevents manually creating this situation.	Revise the disbursement date or loan period start date in the Loan Origination 2 page.
FAEDDISBDT03	Disbursement dates must be in chronological order.	Disbursement dates are not in order.	Revise disbursement dates in the Loan Origination 2 page.
FAEDDRVLIC01	Borr DL Number or state missing.	The borrower's driver's license information was incomplete when the loan was originated.	Update the driver's license data in the Driver's License page, and then use the Loan Demographic Data page to update this information in the Originate Loan component.
FAEDGRADDT01	Grad date before loan end date.	The graduation date viewed in the Originate Loan component is before the end of the loan period.	Update the FA Term graduation date (if required), and then use the Loan Demographic Data page to update this graduation date in the Originate Loan component.

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Equation	Description	Cause	Resolution
FAEDNAME01	Student name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the student's name on the Names page or modify the name usage setting to select one of the student's existing names.
FAEDNAME02	Borrower name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the borrower's name on the Names page or modify the name usage setting to select one of the borrower's existing names.
FAEDPER01	Loan period greater than 1 year.	The loan period defined in the Originate Loan 3 page is more than one year.	Change the loan period dates so that the loan period is less than one year. on the Loan Origination 2 page
FAEDPLUS01	PLUS borrower and student SSN are the same.	A PLUS borrower cannot be the student.	Correct possible invalid relationship defined for the student. Assign a new borrower for the PLUS loan.
FAEDPLUS02	No PLUS for grad students allowed.	The student has a graduate NSLDS level in the FA Term record when the loan is originated.	Cancel the loan if appropriate, or change the student's grade level to an undergraduate in the correct FA Term record. If you change the student's grade level, then you also need to use the Loan Demographic Data page to update it in the Maintain Originated Loans component.
FAEDPLUSMPN	Serial PLUS MPN check.	For PLUS loans. Confirms a prior PLUS loan with the same EmplID, borrower EmplID, and lender in the CommonLine MPN Usage page with the current PLUS loan.	To process serially, modify the loan record by changing the borrower or loan destination so that the borrower and lender match the information in the CommonLine MPN Use page. If the loan should be processed as a new MPN, set the Serial Loan Code field on the Loan Origination 3 page from *S* to *N*.

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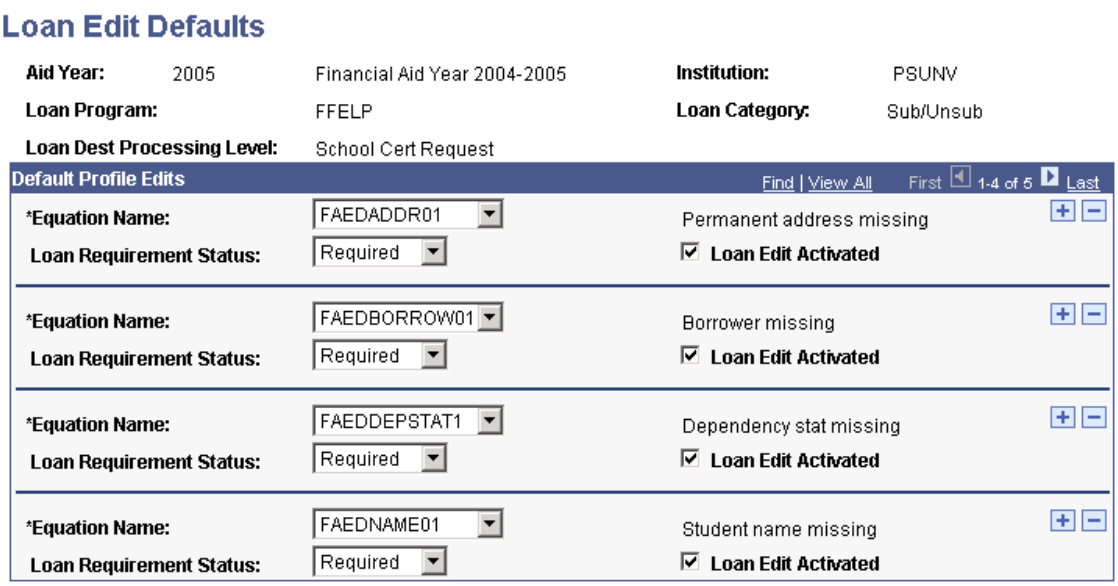
Equation	Description	Cause	Resolution
FAEDREFS01	References missing.	The required number of references have not been defined for the student in the Relationships page and have not been assigned to the loan.	Add the missing references in the Relationships page and Maintain Originated Loans component.
FAEDSRVCIN01	Service indicator exists.	An active negative service indicator is assigned to the student.	Remove the service indicator.
FAEDSSN01	Borrower SSN is blank (PLUS and Alt Loans only).	When the loan was originated, either the borrower was not assigned, or the borrower ID did not have a valid Social Security Number (SSN). A valid SSN has the appropriate country code and a NID type of PR.	Verify that the borrower is assigned in the Originate Loan component. If appropriate, fix the SSN on the Demographic and Address Data component and then import the SSN into the originated loan record using the Loan Demographic Data page.
FAEDSSN02	Student SSN is blank.	When the loan was originated, the student did not have a valid SSN. A valid SSN has the appropriate country code and a NID type of PR.	Revise the SSN on the Demographic and Address Data component and then import the SSN into the originated loan record using the Loan Demographic Data page.

Creating Loan Validation Edit Sets

Access the Loan Edit Defaults page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Edit Sets**, and then **Loan Edit Defaults**).

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

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The system uses the edit sets defined on this page when you define loan destination profiles.

Field or Control	Description
Loan Program	Values are: *Alternative, Direct Lending, FFELP, Health Professions, State,* and *University.*
Loan Category	Indicates a subsidized, unsubsidized, alternative, or PLUS loan.
Loan Dest Processing Level (loan destination processing levels)	Values are: *Direct, Guarantee and Print Appl* (application), *Print and Guarantee, Guarantee Only, School Certification Request,* and *Manual.*

Default Profile Edits

Define loan edits to use during validation for the selected loan program, category, and destination processing level. In addition to creating new edit sets, you can also add or delete edits, or activate or deactivate existing edits.

Field or Control	Description
Equation Name	Select a predefined edit equation. Edit equations are defined in the Equation Engine and are set up on the Loan Edits/Messages page for use by the loan validation process.
Loan Requirement Status	For each section, indicate one of the following: *Optional:* The selected section is not a requirement for the loan. *Recommended:* The selected section is not a requirement for the loan. *Required:* The selected section is a requirement for the loan. **Note:** The field value does not affect current loan functionality, but is intended to support future business processes.
Loan Edit Activated	Select to activate an edit.

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Selecting Equations for the Hold and Release Process

To set up equations for the hold and release process, use the Hold and Release Equations component (LN_CLHR_EQ_NAME).

This section describes how to select equations for the hold and release process.

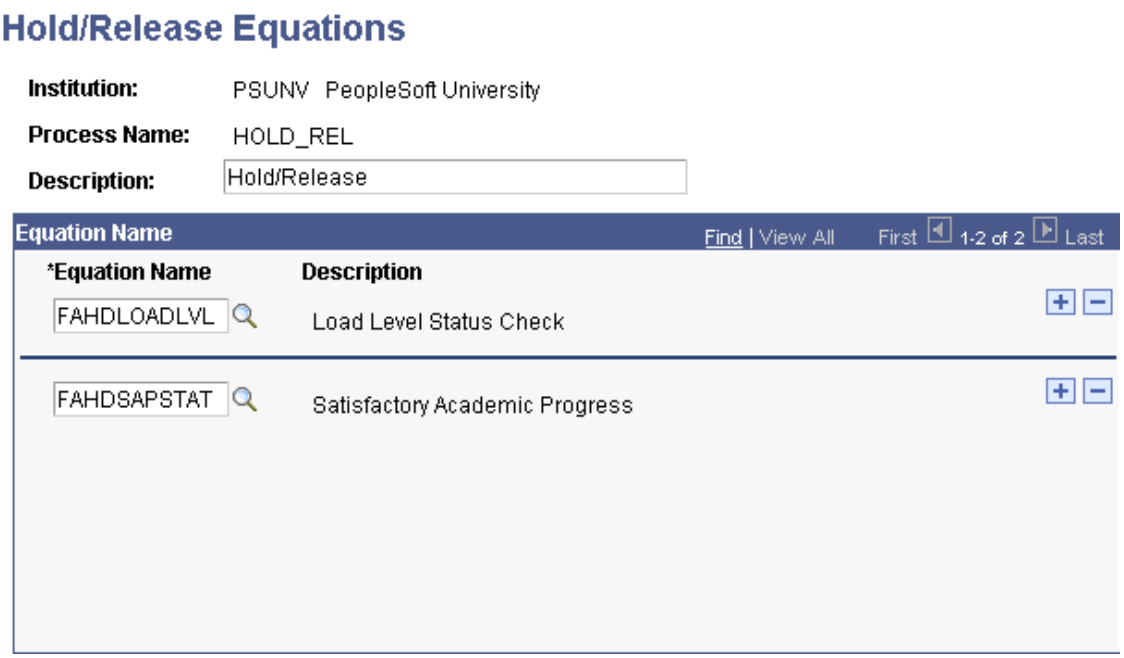
Page Used to Set Equations for Hold and Release

Page Name	Definition Name	Navigation	Usage
Hold/Release Equations	LN_HR_EQ_NAME_PNL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Hold and Release Equations**, and then **Hold/Release Equations**	Select the equations that you require the hold and release process to use.

Selecting Equations for Hold and Release

Access the Hold/Release Equations page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Hold and Release Equations**, and then **Hold/Release Equations**).

This example illustrates the fields and controls on the Hold/Release Equations page. You can find definitions for the fields and controls later on this page.



The equations that you select on this page form an equation set unique to the specified process name.

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On the Set Hold/Release Flag process page, you can specify the set of equations that the CommonLine disbursement hold and release process should use.

Field or Control	Description
Description	Displays the process for which you are selecting equations.
Equation Name	Select an equation. The list contains all equations created for the selected institution; select only those equations created specifically for hold and release processing.

If you use the hold and release process at your institution without modifications, create at least one hold and release equation set with the two provided hold and release equations: FAHDLOADLVL (Load Level edit) and FAHDSAPSTAT (Satisfactory Academic Progress check).

> **Note**
>
> When creating equations, follow the equation naming conventions.

Creating Loan Destinations

To set up loan destinations, use the Create Loan Destinations component (LN_DEST_PROFILE).

This section provides an overview and discusses how to:

- Define loan destination profiles.
- Define CommonLine options.
- Define loan destination edits.

Understanding Creating Loan Destinations

Consolidate the loan participants—the lender, guarantor, and servicer—into one entity, the loan destination. The loan destination defines the business characteristics and protocols between a lender, guarantor, and servicer, which enables them to process loans for the school. You must create a loan destination profile for each lender in the FFELP loan program or alternative loan program, and for the direct lending servicer for direct loans.

Pages Used to Create Loan Destinations

Page Name	Definition Name	Navigation	Usage
Loan Dest Profile (loan destination profile)	LN_DEST_PROFILE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Destinations**, and then **Loan Dest Profile**	Define participants that your institution uses to exchange loan application data. You can designate multiple destinations for a specific loan program.

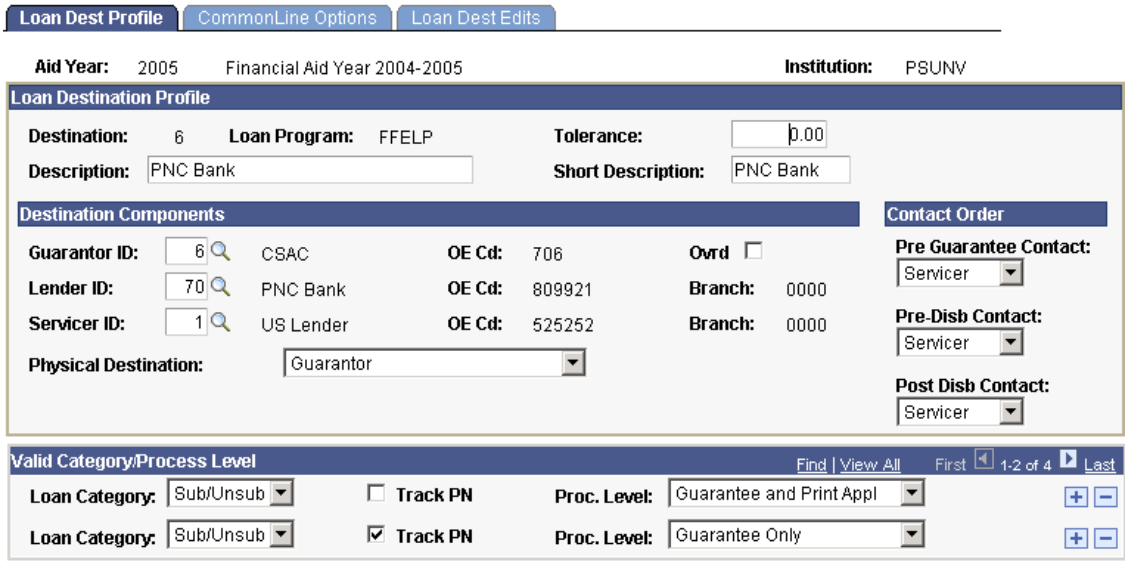
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Page Name	Definition Name	Navigation	Usage
CommonLine Options	LN_DEST_PROFILE2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Destinations**, and then **CommonLine Options**	Designate CommonLine options for a loan destination.
Loan Dest Edits (loan destination edits)	LN_DEST_EDITS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Destinations**, and then **Loan Dest Edits**	Select loan validation edits to be used for the loan destination.

Defining Loan Destination Profiles

Access the Loan Dest Profile page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Destinations**, and then **Loan Dest Profile**).

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



Normally, a loan destination includes a lender, a guarantor, and a servicer. CommonLine requires that you define at a minimum a guarantor for the destination.

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Loan Destination Profile

Field or Control	Description
Loan Program	Create a loan destination profile for each participant that receives the physical loan origination files. Select from: *Alternative, FFELP, Health, Perkins, State,* and *University.*
Tolerance	Used for CommonLine 96 loans processing. This field is no longer used for current loan processing.
Description	For a FFELP loan, enter a description that best describes the destination.

Destination Components

Field or Control	Description
Guarantor ID, Lender ID, and **Servicer ID**	Select any combination of the guarantor, lender, and servicer, but note that one of them must be the guarantor. This is a CommonLine requirement. Select the **Ovrd** (override) check box to save the page without designating all three components. After you select an ID and press **TAB** to move to the next field. The system displays the office of education code and branch. If you are defining a loan destination for the direct lending loan program, you should only select a servicer ID.
Ovrd (override)	Select this check box to be able to save the page without having to designate all three components.
Physical Destination	Select the destination to receive the loan application. Values are: *Lender, Servicer,* and *Guarantor.*

Contact Order

Field or Control	Description
Pre-Guarantee Contact, Pre-Disbursement Contact, and **Post Disbursement Contact**	Identifies the loan agency that should be contacted based on the state of the student's loan application. Select a guarantor, lender, or servicer. These fields are for information only and are not used by the loan processes.

Valid Category Process Level

Assign the process level when you originate a loan.

Field or Control	Description
Loan Category	Identify the loan category that the loan destination processes. Values are: *Alt Loan* (alternative loan), *PLUS, Subsidized,* and *Unsub.*

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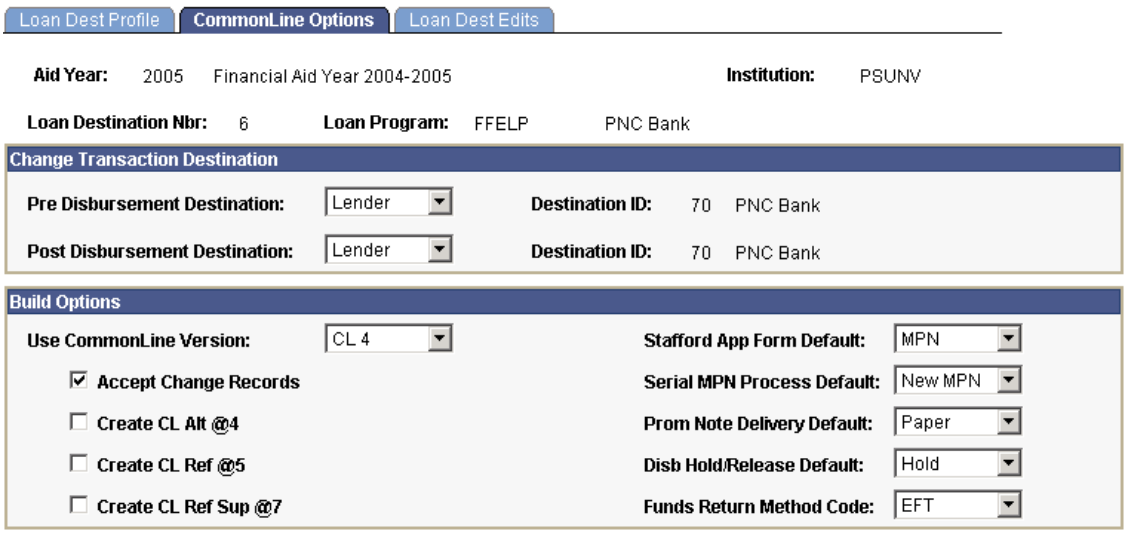
Field or Control	Description
Track PN (track promissory note)	Select to indicate how the presence of an application or promissory note determines the process level. The loan origination process checks for an application or promissory note in the Promissory Note Alt, Promissory Note Plus, and CommonLine PNote - Stafford. components. For example, if you are originating a combination Stafford loan (subsidized or unsubsidized) and you have received the promissory note prior to originating the loan, you would select the check box to originate the loan with the process level of Guarantee Only. However, if you are originating without an application or promissory note, you can set *Print and Guarantee* as your process level.
Proc Level (process level)	Select the loan processing level that the loan destination performs for the corresponding loan category. Select from: *Direct:* Select for direct loans. *Guarantee Only:* Select to have the service provider guarantee the loans only. *Guarantee and Print Appl:* Select to have the service provider guarantee the loan and print and mail a promissory note to the borrower. *Manual:* Select if the borrower wants to use a lender unable to take electronic applications using CommonLine. *Print and Guarantee:* Select to have the service provider print and mail a promissory note to the borrower and guarantee the resulting loan after receipt of the promissory note. *School Cert request:* Select if the loan destination participates in school certification request processing.

Defining CommonLine Options

Access the CommonLine Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Destinations**, and then **CommonLine Options**).

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

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Field or Control	Description
Pre Disbursement Destination and **Post Disbursement Destination**	Designate the loan agency to receive change transaction records when a loan adjustment occurs before or after the receipt of loan funds by the school.
Use CommonLine Version	Select the CommonLine version to indicate the CommonLine application send and change transaction file format to use when creating files for the loan destination. CommonLine version 4 (CL4) is the only valid option for this component.
Accept Change Records	Select to indicate whether the loan destination can receive CommonLine 4 change transaction records. If this check box is clear, the loan origination process adjusts loan eligibility as appropriate, but the system does not generate a CommonLine 4 change transaction record for electronic transmission. **Note:** Your school must notify the appropriate lending agency of changes in loan eligibility if a change transaction record cannot be sent using CommonLine procedures.
Create CL Alt @ 4 (create CommonLine alternative), **Create CL Ref @ 5** (create CommonLine reference), and **Create CL Ref Sup @ 7** (create CommonLine reference supplemental)	These check boxes identify optional CommonLine 4 application subrecords. Select to have the CommonLine outbound process build the selected records for all loans of the loan destination. You set up these file build options based on the business processes established between your school and your loan destinations.
Stafford App Form Default (Stafford application form default)	Select the type of Stafford application to use when originating a Stafford loan and when no unused tracked Stafford applications exist. Values are *MPN* (master promissory note) or *Common App* (common application). Note that the Stafford MPN is the current acceptable form for Stafford loan processing.

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Field or Control	Description
Serial MPN Process Default (serial master promissory note process default)	Select the serial default master promissory note process. Use *New MPN* for a new master promissory note or *Serial MPN* for serial loan processing. The default value of this field is set in the Financial Aid Installation Defaults page. You can override the value here. When you originate a Stafford loan for this destination, the system uses this default value. You can also override this setting at the loan origination level by updating the record in the Maintain Originated Loans component prior to the transmission of the loan. You can also control whether individual students can qualify for serial loan processing by updating the student's settings in the Maintain Student MPN Usage component. **Note:** Originating a loan as a serial loan does not result in the loan's rejection if the borrower does not qualify. Refer to the CommonLine 4 version of the *NCHER CommonLine Network for FFELP and Alternative Loans Reference Manual* for information about the serial loan process.
Prom Note Delivery Default (promissory note delivery default)	Select how you want promissory notes to be delivered to the borrower. Values are: *Email*, *Paper*, and *Web*. **Note:** The promissory note delivery method is agreed upon between the school and the loan destination.
Disb Hold/Release Default (disbursement hold/release default)	The system sets this field when a loan is originated. Use this field if you participate in disbursement hold and release processing with your loan destination. The default value is *No Support*, which means that the hold and release process is not supported by the loan destination. Override the default by selecting *Hold* or *Release*. A disbursement hold and release status is set for every disbursement of an originated loan. You can automatically place all disbursements on hold or release status when the loan is originated. As you approach the disbursement date, you can request the disbursements on hold to be released to your school for students who are eligible to be paid. Conversely, you can request disbursements set for release to be placed on hold for students who are not eligible to be paid. Do this by updating the student's hold or release status in the Loan Origination component. Changes to disbursement hold and release status are then communicated to the loan agency through the CommonLine V.4 Change Transaction record.

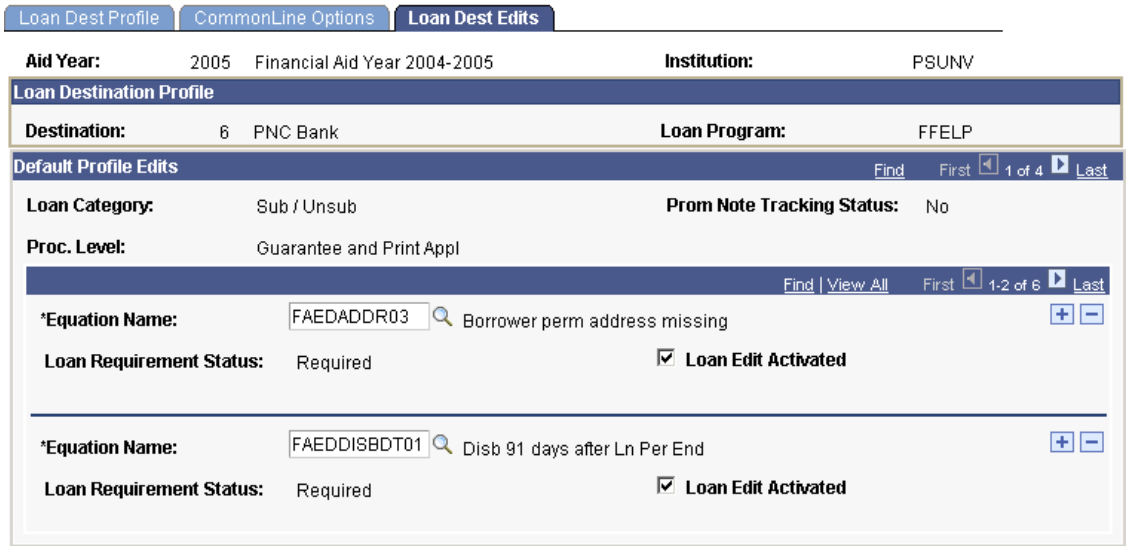
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Field or Control	Description
Funds Return Method Code	Select a code to indicate methods for disbursement of funds. Select from: *Borr Check* (borrower check): Individual borrower checks. *EFT* (electronic funds transfer): Funds moved electronically from one account to another. *Master Chk* (master check): A single check to the school containing the sum of funds for all borrowers that are being disbursed to the same institution on the same day. *Netting:* Funds that have been sent to the school electronically are reallocated for disbursement to another eligible borrower instead of being returned. The disbursing agent then deducts the adjusted amount from the total dollar amount on the next transmission of funds to the school.

Defining Loan Destination Edits

Access the Loan Dest Edits page (**(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Destinations**, and then **Loan Dest Edits**).

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



When you define a valid loan category and processing level on the Loan Dest Profile page, it matches those parameters to a default edit profile defined in the Loan Edits Default page and automatically attaches them to the loan destination. Use this page to add, delete, or adjust the default values.

The upper portions of this page display profile information from the Loan Dest Profile page.

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Field or Control	Description
Equation Name	Select an equation name for the edit statement. Edit statements are set up on the Loan Edits/ Messages page.
Loan Requirement Status	Displays *Optional*, *Recommended*, or *Required*.
Loan Edit Activated	Select to enforce an edit. For example, a loan destination might require a signed promissory note for all loans before the start of the loan period, but might not require one after the loan period begins. If you clear this check box, the system does not look for a signed promissory note in validation.

Specifying Loan Processes

To set up loan institutions, use the Define Loan Institutions component (LOAN_INST_TABLE).

This section discusses how to set up your loan institution by specifying processes and contact information.

Pages Used to Specify Loan Processes

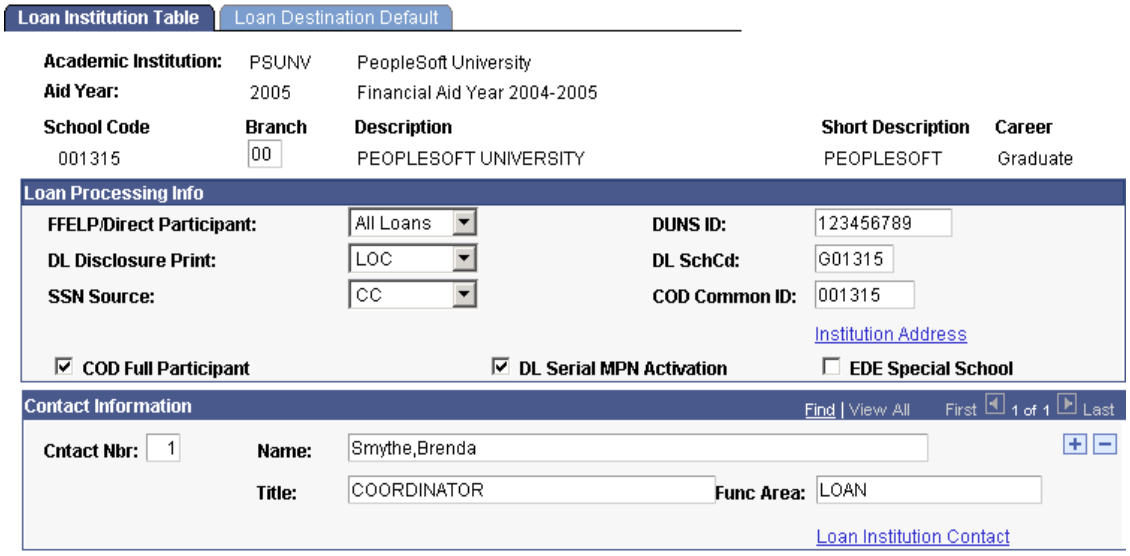
Page Name	Definition Name	Navigation	Usage
Loan Institution Table	LOAN_INST_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Institution Table**	Define how your school processes loans for the academic year. You can define loan processes for each academic career of your institution.
Loan Institution Address Information	LN_INST_ADDR_SEC	Click the **Institution Address** link on the Loan Institution Table page.	Enter address information for each loan institution.
Loan Institution Contact Information	LN_INST_CNTCT_SEC	Click the **Loan Institution Contact** link on the Loan Institution Table page.	Update the address, mailbox type, and mailbox identification.

Specifying Loan Processes

Access the Loan Institution Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Institution Table**).

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

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Field or Control	Description
FFELP/Direct Participant	Select if the loan institution can originate FFELP or direct loans, or both. Alternative loans are not affected by this setting.
DL Disclosure Print (direct lending disclosure print)	For direct lending.
DL SchCd (direct lending school code)	If your institution processes direct loans, enter your direct lending school code. This field is hidden if your school does not participate in the direct lending program.
SSN Source (social security number source)	For direct loan and COD processing. Select the source of the student's Social Security Number, such as from PeopleSoft Campus Community Fundamentals.
COD Full Participant	Select if your institution is a full participant for common origination and disbursement.
DL Serial MPN Activation (direct loan serial master promissory note activation)	Select if the loan institution that you are defining uses the direct loan serial master promissory note. This field is hidden if your school does not participate in the direct lending program.
EDE Special School (electronic data express special school)	For direct loans. Select to set an identification prompt on the origination file. This is for schools approved by the Department of Education for special consideration for direct loan processing by the Loan Origination Center (LOC). Usually the default rate for the school must be lower than 10%.
Cntact Nbr (contact number)	Enter contact information for each financial aid administrator in charge of loan processing. Assign a contact number for each entry.
Institution Address	Click to access the Loan Institution Address Information page.

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Field or Control	Description
Loan Institution Contact	Click to access the Loan Institution Contact Information page and update the address, mailbox type, and mailbox identification.

Setting Up Loan Origination

To set up a default loan agency, use the Reassign Loan Agencies component (LN_AGENCY_DFLT) and Define Loan Institutions component (LOAN_INST_TABLE).

This section provides an overview of loan origination and discusses how to:

- Specify a default loan agency.
- Set up loan destination defaults.

Understanding Loan Origination

Because CommonLine 4 process levels only require a guarantor to originate a loan, the loan destination that you use to originate the loan might not be the same loan destination that you use to guarantee the loan.

Loan origination follows a seven-step process to determine the lender and guarantor and then determine the loan destination. You determine which steps to follow when you set destination defaults.

Step	What Happens	Possible Information Selected
1	If an active, unused promissory note is tracked, the process selects the designated lender and guarantor from the form used for origination. The process skips steps 2 through 6.	Lender only Guarantor only Lender and guarantor No information
2	If a matching loan is originated and guaranteed in the current aid year for the borrower, the system uses lender and guarantor from the earlier origination record, and the process skips steps 4 through 6.	Lender and guarantor No information
3	If the student has entered a lender from the self-service lender selection pages, the process uses the selected lender and skips steps 4 through 6.	Lender No information
4	The origination process searches back one year for a prior year originated loan of the same loan type; if a prior loan is found, the process skips steps 5 and 6.	Lender and guarantor No information

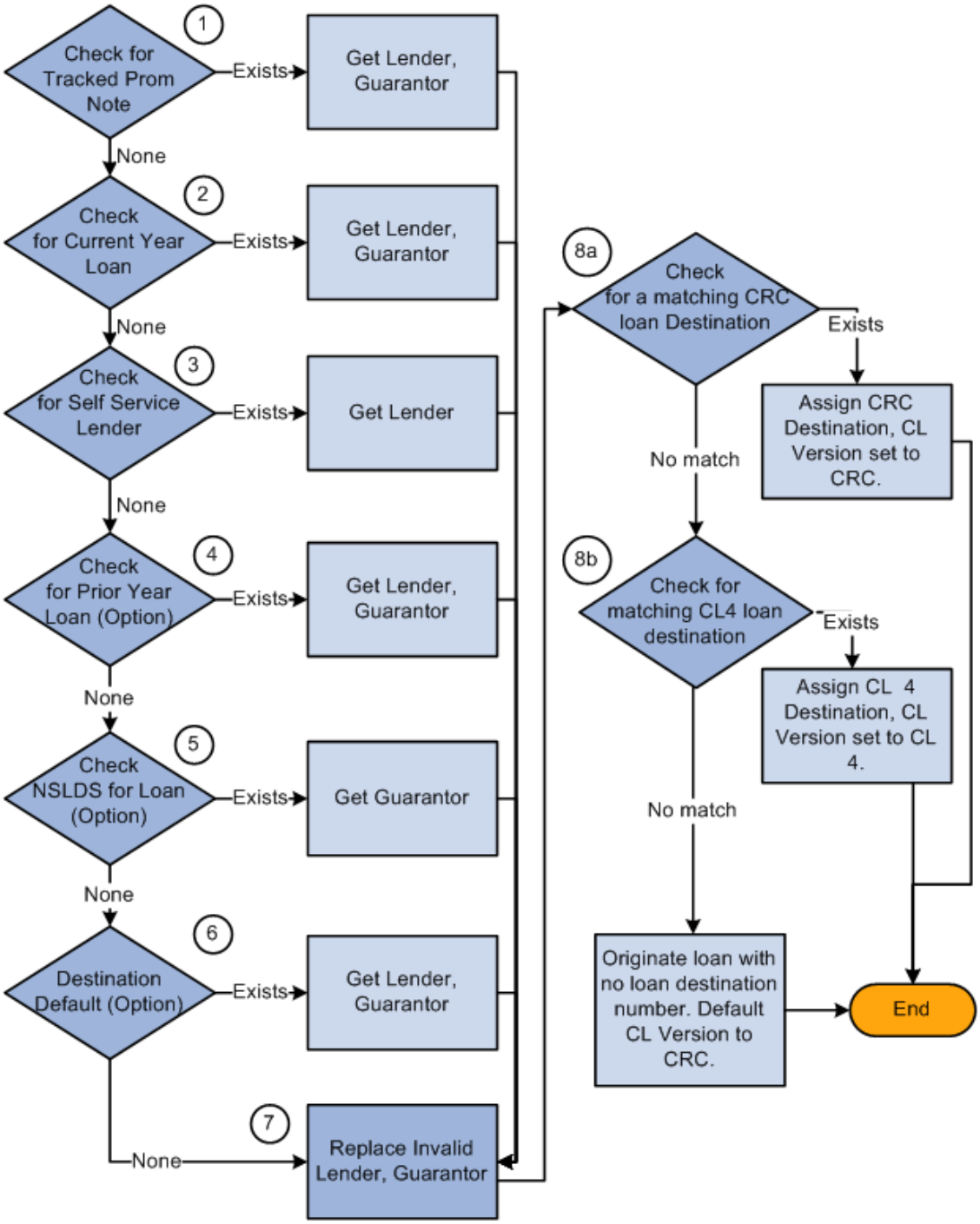
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Step	What Happens	Possible Information Selected
5	The origination process searches the current NSLDS history to find a previously originated loan of the same loan type. A new NSLDS loan type cross reference section is available in the Loan Type Table component to facilitate this step. If a prior loan is found, the process skips step 6. **Note:** Only the guarantor is used from the NSLDS loan history.	Guarantor only No information
7	The process assigns a default destination	Lender only Guarantor only Lender and guarantor No information
6	The process checks the validity of the selected lender and guarantor values and reassigns lender and guarantor IDs as defined in the Agency Default page.	Lender only Guarantor only Lender and guarantor No information
8	Based on the lender and guarantor information selected in the prior steps, the loan origination process searches for a matching loan destination profile record. If one is not found, the loan is still originated, but it cannot be transmitted until a loan destination is assigned.	Loan destination No destination

The following chart illustrates the process:

Process flow to determine loan destination

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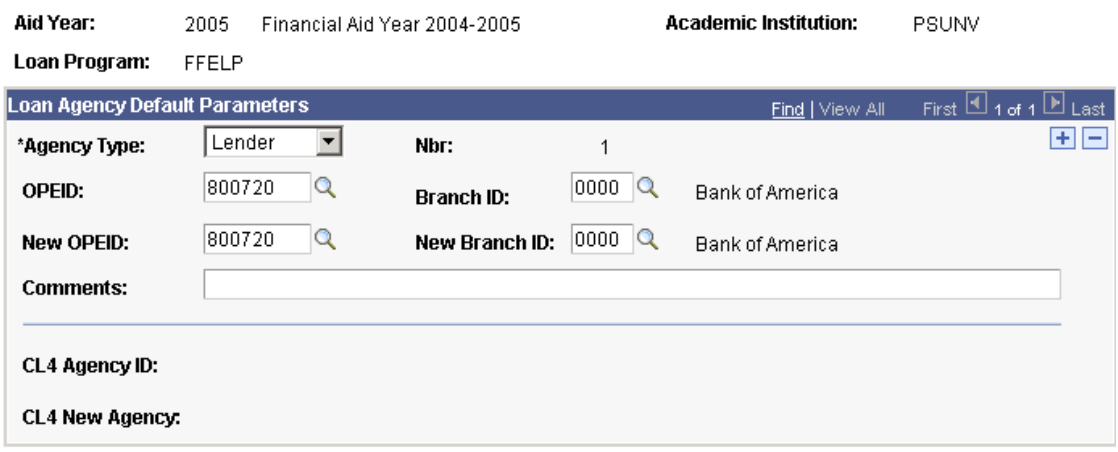
Pages Used to Set Up Loan Origination

Page Name	Definition Name	Navigation	Usage
Agency Default Setup	LN_AGENCY_DFLT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Reassign Loan Agencies**, and then **Agency Default Setup**	Identify a default agency if the borrower does not select a lender, guarantor, or servicer. Identify lenders, guarantors, or servicers that are no longer in service and have them replaced automatically with a new agency when a loan is originated.
Loan Destination Default	LOAN_INST_TABLE2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Destination Default**	Set up default parameters for loan destination.

Specifying a Default Loan Agency

Access the Agency Default Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Reassign Loan Agencies**, and then **Agency Default Setup**).

This example illustrates the fields and controls on the Agency Default Setup page. You can find definitions for the fields and controls later on this page.



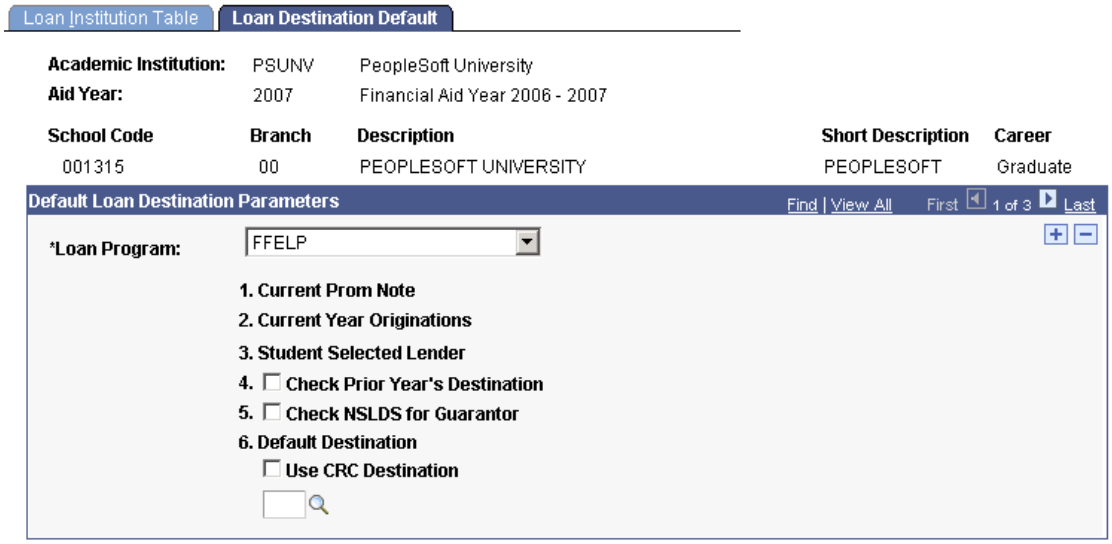
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Field or Control	Description
Agency Type	Select from: *Guar/Ins* (guarantor/insurer), *Lender*, and *Servicer*.
OPEID (office of postsecondary education identifier)	Select the office of postsecondary education identifier. To assign a default loan agency, leave this field blank.
New OPEID	Enter the agency to replace the previous agency, or the default agency if you left the **OPEID** field blank. **Note:** The source of values for the **OPEID** and **New OPEID** field are defined in the Create CRC Loan Participant component.
CL4 Agency ID	Displays the ID and agency name.
CL4 New Agency	Displays the ID and name for the new agency.

Setting Up Loan Destination Defaults

Access the Loan Destination Default page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Destination Default**).

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



The order in which the system chooses the loan destination for the student is as follows: Current Promissory Note, Current Year Originations, Check Prior Year Originations, Check NSLDS for Guarantor, Default Destination.

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Field or Control	Description
Loan Program	Select from *Alternative, Direct, FFELP, Health, Perkins, State,* or *University.*
Current Prom Note (current promissory note), **Current Year Originations**, and **Student Selected Lender**	The loan origination process always performs these steps.
Check Prior Year's Origination and **Check NSLDS for Guarantor**	Select to have the system perform these steps.
Default Destination	If nothing results from the first four search methods, the system uses this default destination. The field allows you to select from the CommonLine 4 loan destination profile numbers. Select the **Use CRC Destination** (common record commonline destination) check box to allow the selection of CRC loan destination profile numbers.
Use CRC Destination	Select to use CRC destination. This controls the dynamic prompting of either CL4 or CRC loan destinations in the edit box on the page. • If you select the check box and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CRC is used. • If you clear the check box and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CL4 is used. Note that a default loan destination number is not required to activate this behavior. The current rule used by the origination process to determine the CL version and loan destination number has not been changed.

Setting Up Process Demographic Data

To set up process demographic data, use the Define Demographic Data Use component (FA_PRCSDEMO_TBL), Address Usage Table component (FA_PRCSDEMO_TBL), and Name Usage Table component (NAME_USAGE_TABLE).

This section discusses how to set up process demographic data.

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Pages Used to Set Up Process Demographic Data

Page Name	Definition Name	Navigation	Usage
FA Process Demographic Use	FA_PRCSDEMO_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**	Indicate where to retrieve the student demographic information for loan processing. The loan origination process extracts borrowers' demographic information from Campus Community.
Address Usage	ADDR_USAGE_TABLE	• **Set Up SACR**, and then **Product Related**, and then **Campus Community**, and then **Establish People Processing**, and then **Setup**, and then **Address Usage Table**, and then **Address Usage** • Click the **Address Usage Table** link on the FA Process Demographic Use page.	Define or review address and email usages by specifying hierarchies of address types to search for and use in a specific usage.
Name Usage Table	NAME_USAGE_TABLE	• **Set Up SACR**, and then **Product Related**, and then **Campus Community**, and then **Establish People Processing**, and then **Setup**, and then **Name Usage Table**, and then **Name Usage** • Click the **Name Usage Table** link on the FA Process Demographic Use page.	Define name usages to specify the hierarchies of name types that you want to use in a specific usage. For example, use this to define the hierarchy for the use of names for Communication Generation. There's also a setup for salutations for communications.

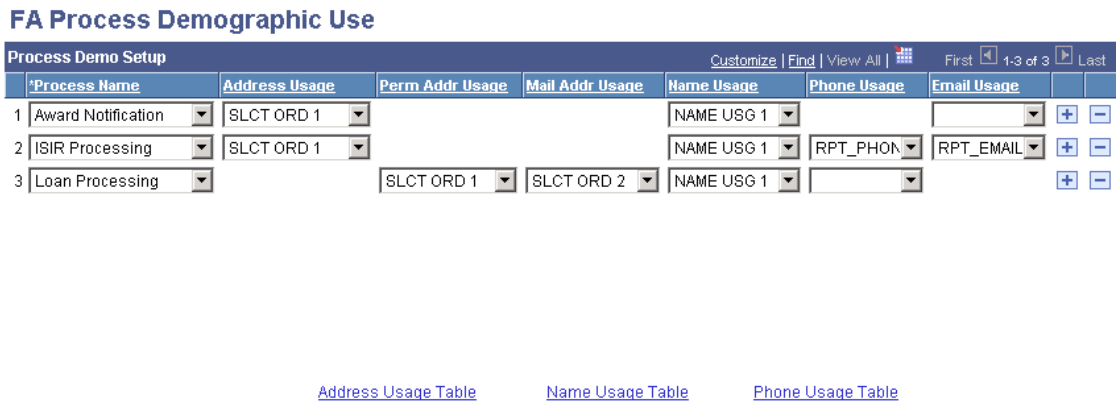
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Page Name	Definition Name	Navigation	Usage
Phone Usage	PHONE_USAGE_TABLE	• Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Phone Usage Table, Phone Usage • Click the **Phone Usage Table** link on the FA Process Demographic Use page.	Define phone usages to specify the hierarchies of telephone types to search for and use in a specific usage.

Setting Up Process Demographic Data

Access the FA Process Demographic Use page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**).

This example illustrates the fields and controls on the FA Process Demographic Use page. You can find definitions for the fields and controls later on this page.



The system displays settings defined in Campus Community setup.

Field or Control	Description
Address Usage	Use to select the address usage table setting defined in Campus Community for use by the associated process. Not used for loans.
Perm Addr Usage (permanent address usage)	Used to select the address usage table settings defined in Campus Community setup to determine the address type.
Mail Addr Usage (mail address usage)	Used to select the address usage table settings defined in Campus Community setup to determine the address type.

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Field or Control	Description
Name Usage	Used to select the name usage table settings defined in Campus Community setup to determine the name for the associated process. For loans, this is used to select the student and borrower names.
Phone Usage	Used to select the phone usage table settings defined in Campus Community setup to determine the phone number for the associated process.
Email Usage	Indicates the type of email address, such as home, business, dorm, or campus. Used to select email usage table settings defined in Campus Community setup for use by the associated process.
Address Usage Table	Click to access the Address Usage page to define or review address usages.
Name Usage Table	Click to access the Name Usage page to define or review name usages.
Phone Usage Table	Click to access the Phone Usage page to define or review phone usages.

> **Note**
>
> Email address usages are defined in the Address Usage Table.

Related Topics

- Campus Community Fundamentals: Establishing Name Usages
- Campus Community Fundamentals: Establishing Address Usages

Setting Up Electronic Data Interchange

To set up electronic data interchange, use the Entity Codes component (EC_ENTITY_CODE_TBL), Define EDI Business Unit component (FA_EDI_DEST), Internal Partners component (EC_INT_PARTNER_DEF), External Partners component (EC_EXT_PARTNER_DEF), Maintain Loan Transfer ID component (LN_XFER_FILE_ID).

This section provides an overview of EDI Manager and describes how to:

- Create electronic data interchange (EDI) entity codes.
- Set up Financial Aid EDI destinations.
- Set up EDI partner profiles.
- Set up profile defaults.
- Set up EDI internal partners.
- Set up EDI external partners.
- Set up loan transfer IDs.

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Understanding EDI Manager

You use EDI Manager to set up and maintain data about trading partners and to define data mapping between transaction files and the tables in your database. EDI is a standard means of exchanging data electronically. When you initiate a transaction, the system extracts the transaction data from your database and translates it into a common EDI format. Financial Aid uses EDI Manager to generate files formatted for CommonLine 4 and federal direct lending.

To send records to your trading partners:

1. Run a process to gather the data files that are ready to be transmitted.

   The process moves all applicable data to EDI outbound staging tables.

2. Run an EDI Manager process to convert the data to flat files.

To receive records from your trading partners, run an EDI process to deposit the files into EDI inbound staging tables and then run a separate process to move the files into the database.

Pages Used to Set Up Electronic Data Interchange

Page Name	Definition Name	Navigation	Usage
EC Entity Code Tbl (electronic commerce entity code table)	EC_ENTITY_CODE_TBL	**PeopleTools**, and then **EDI Manager**, and then **Set Up Trading Partners**, and then **Entity Codes**, and then **EC Entity Code Tbl**	Create an entity code for an internal trading partner.
Financial Aid EDI Destination	FA_EDI_DEST	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Define EDI Business Unit**, and then **Financial Aid EDI Destination**	Create an entity to represent your financial aid business office as an EDI destination. A predefined value of FABU is provided.
Profile Definition	EC_TP_PROFILE_1	**PeopleTools**, and then **EDI Manager**, and then **Define EDI Transactions**, and then **Partner Profiles**, and then **Profile Definition**	Set up EDI partner profiles. Control how outbound files are processed.
Output Message Header/Footer	EC_MESSAGE	Click the **Message** button on the Profile Definition page.	Designate a message header and footer.
Profile Defaults	EC_TP_PROFILE_2	**PeopleTools**, and then **EDI Manager**, and then **Define EDI Transactions**, and then **Partner Profiles**, and then **Profile Defaults**	Set up your default partner profiles.

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Page Name	Definition Name	Navigation	Usage
EC Int Partner Def (electronic commerce internal partner definition)	EC_INT_PARTNER_DEF	**PeopleTools**, and then **EDI Manager**, and then **Set Up Trading Partners**, and then **Internal Partners**, and then **Ec Int Partner Def**	Set up internal EDI recipients, such as the Financial Aid Office.
EC Ext Partner Def (electronic commerce external partner definition)	EC_EXT_PARTNER_DEF	**PeopleTools**, and then **EDI Manager**, and then **Set Up Trading Partners**, and then **External Partners**, and then **Ec ExtPartner Def**	Set up external EDI trading partners.
Loan Transfer IDs	LN_XFER_ID_UPDT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Transfer ID**, and then **Loan Transfer IDs**	Set up loan transfer IDs to pass information to EDI Manager for all outbound loan file transactions.
Loan Transfer ID Table	LN_XFER_ID_TBL	**Financial Aid**, and then **Loans**, and then **View Loan Transfer ID Records**, and then **Loan Transfer ID Table**	View loan transfer IDs and descriptions.

Creating EDI Entity Codes

Access the EC Entity Code Tbl page (**PeopleTools**, and then **EDI Manager**, and then **Set Up Trading Partners**, and then **Entity Codes**, and then **EC Entity Code Tbl**).

This example illustrates the fields and controls on the EC Entity Code Tbl page. You can find definitions for the fields and controls later on this page.



Entity codes define the internal and external entities that are involved in the EDI process. For loan processing, external trading partners are the loan destinations, and internal trading partners are the schools.

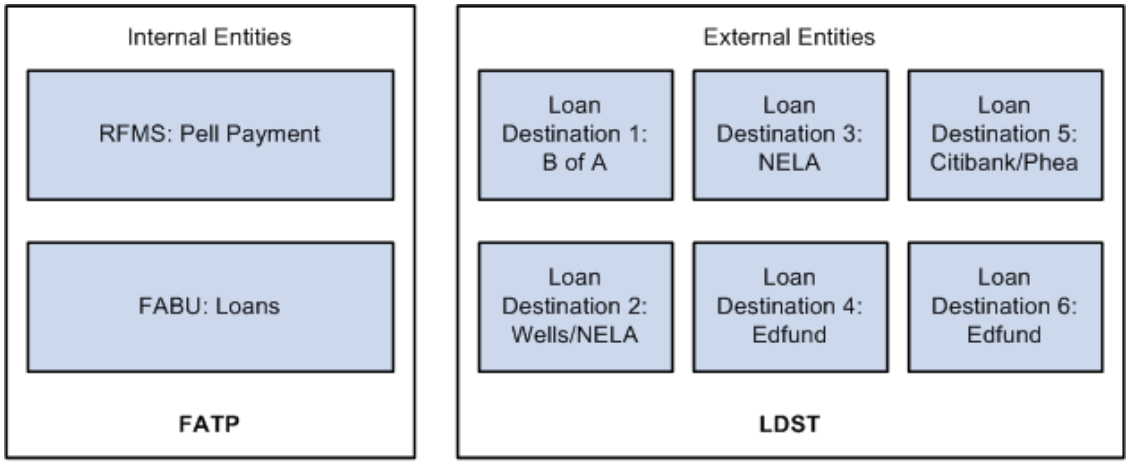
To create an entity code, enter the page in Add mode.

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Field or Control	Description
PeopleSoft Entity Code	Enter a code to identify external or internal trading partners.
Record (Table) Name	Select the table where data for loan participants in the process are located. For loan processing, indicate where the loan destination profile and loan institution information are located. You must create your own database record or view with the appropriate loan trading partners.
External Entity	Select if this entity controls external partners.

Predefined entity codes are provided. Use FABU for school loan offices and LDST for loan destinations. The following illustration shows internal and external entities and codes.

EDI Entity Codes for CommonLine 4



FATP - The University
Predefined Entity code that is used to represent the University. FATP is associated with additional predefined entity codes which represent internal Financial Aid Business Units. This relationship is created by entering the related entity codes in the Financial Aid EDI Destination page.

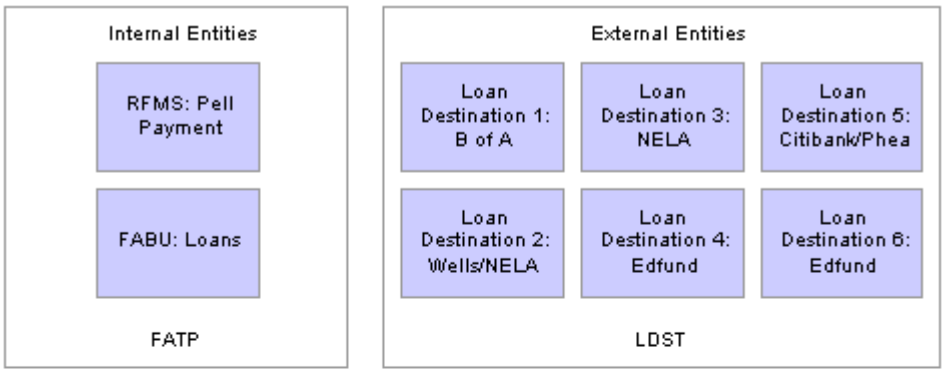
RFMS is the entity code used to represent the internal business unit that handles Pell Payment processing.

FABU is the internal business unit that handles CommonLine loan processing.

LDST - Loan Destinations
This single Entity Code is used to represent all Loan External Trading Partners. Each Loan Destination Profile defined is represented by this entity code.

EDI Entity Codes for CommonLine 4

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FATP - The University Predefined Entity code that is used to represent the University. FATP is associated with additional predefined entity codes which represent internal Financial Aid Business Units. This relationship is created by entering the related entity codes in the Financial Aid EDI Destinatiopage.

RFMS is the entity code used to represent the internal business unit that handles Pell Payment processing.

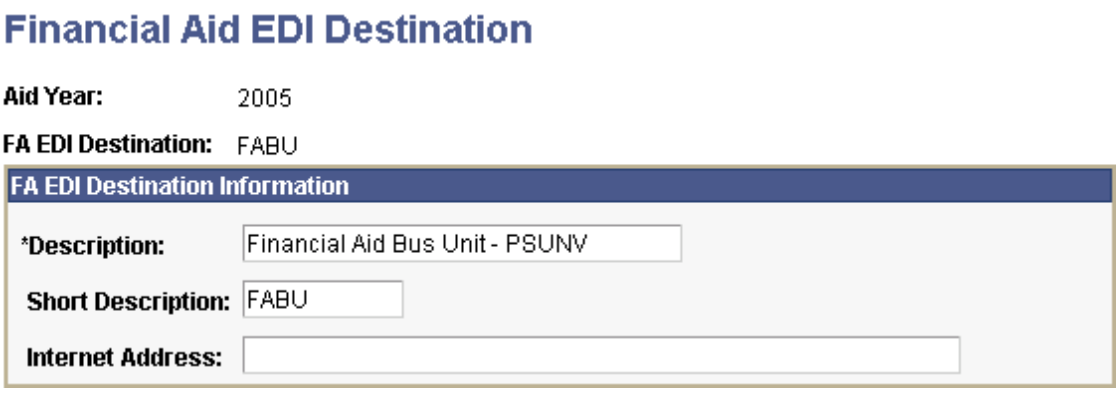
FABU is the internal business unit that handles CommonLine loan processing.

LDST - Loan Destinations This single Entity Code is used to represent all Loan Extern Trading Partners. Each Loan Destination Profile defined is represented by this entity code.

Setting Up Financial Aid EDI Destinations

Access the Financial Aid EDI Destination page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Define EDI Business Unit**, and then **Financial Aid EDI Destination**).

This example illustrates the fields and controls on the Financial Aid EDI Destination page.



Enter the **Description, Short Description,** and **Internet Address** to set up your FA EDI destinations.

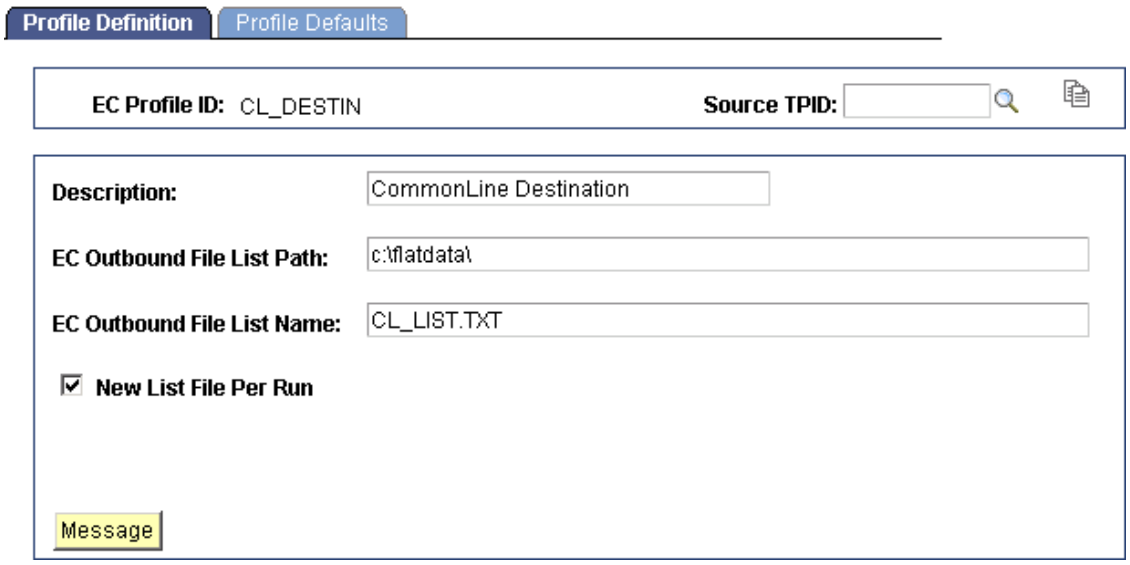
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> **Note**
>
> To restrict your outbound files using a setID, enter your setID value as the destination instead of the FABU entity code.

Setting Up EDI Partner Profiles

Access the Profile Definition page (**PeopleTools**, and then **EDI Manager**, and then **Define EDI Transactions**, and then **Partner Profiles**, and then **Profile Definition**).

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



Financial Aid uses the EDI partner profile to control the location of created EDI files. A list of all created files can also be generated. CL_DESTIN is a predefined EDI partner profile.

You might want to create an EDI partner profile for each loan destination. For example, you might place files from each bank in a separate directory.

Field or Control	Description
EC Profile ID (electronic commerce profile identification)	Identifies the electronic commerce profile. The EDI Partner Profile component creates profile ID records.
Source TPID	Copy information from an existing EC profile ID. Select the source TPID and click the **Copy** button.
EC Outbound File List Path	Specify the directory to which you want EDI Manager to write outbound files.
EC Outbound File List Name	Specify the name of the file that lists all outbound files.

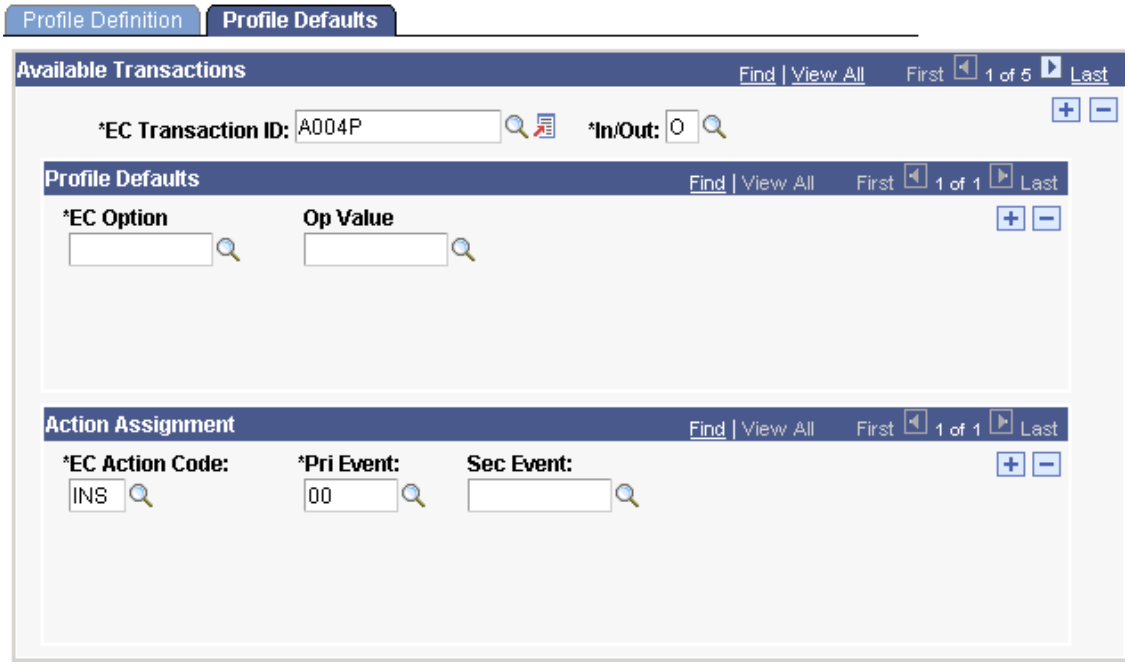
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Field or Control	Description
New List File Per Run	Select to refresh the file list each time that you run the EC outbound agent.
Message	Click to access the Output Message Header/ Footer page and designate a message header and footer.

Setting Up Profile Defaults

Access the Profile Defaults page (**PeopleTools**, and then **EDI Manager**, and then **Define EDI Transactions**, and then **Partner Profiles**, and then **Profile Defaults**).

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



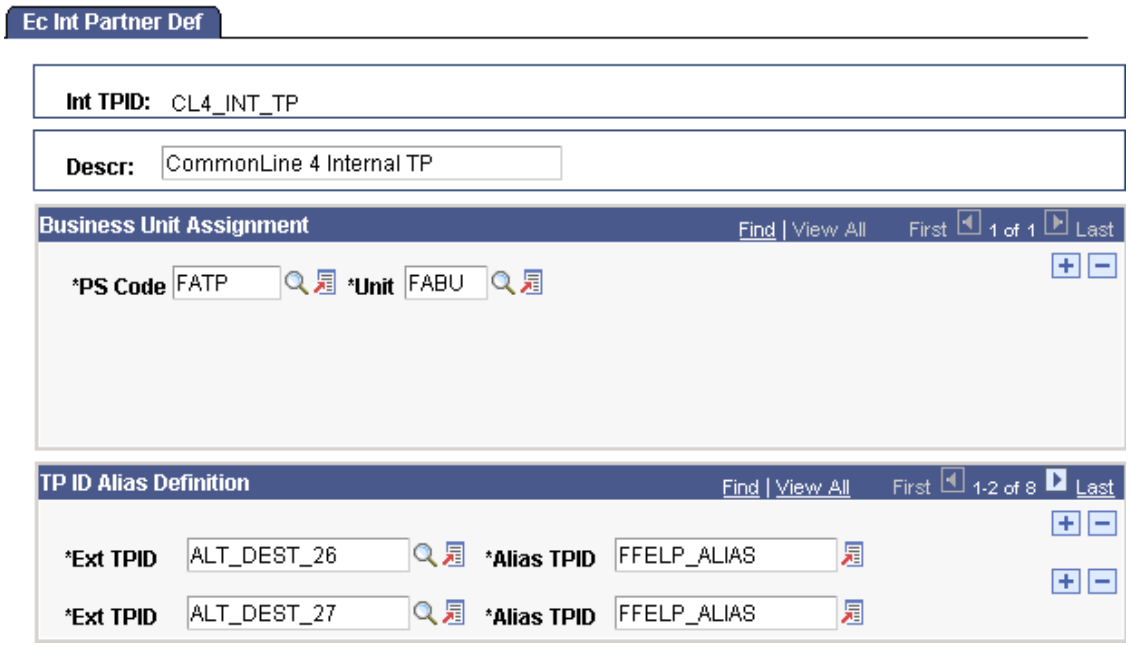
Field or Control	Description
EC Transaction ID (electronic commerce transaction identification)	Select an EDI transaction set ID to create the outbound or inbound file.
In/Out	Indicate whether the process is inbound *(I)* or outbound *(O)*.
Pri Event (primary event)	Indicate the status of the transaction, such as new transaction, cancellation, duplicate, status request, and so on. The system assigns the primary event code. These codes are also called purpose codes.
Sec Event (secondary event)	Indicate the type of transaction. Not all transaction types include secondary event codes. These codes are also called transaction codes.

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Setting Up EDI Internal Partners

Access the EC Int Partner Def page (**PeopleTools**, and then **EDI Manager**, and then **Set Up Trading Partners**, and then **Internal Partners**, and then **Ec Int Partner Def**).

This example illustrates the fields and controls on the EC Int Partner Def page. You can find definitions for the fields and controls later on this page.



CL4_INT_TP is a predefined internal trading partner for CommonLine processing. You can use this record to complete your EDI Manager setup or you can create your own internal trading partner record.

Field or Control	Description
Int TPID (internal trading partner identification)	Displays the internal trading partner ID.
PS Code (PeopleSoft code)	Indicates the EDI entity code that identifies the financial aid-related business units at the school, FATP.
Unit	Select the internal financial aid EDI destinations that you set up in the FA EDI Destination page. Use the default value *FABU* or select the unit value that you created for your institution.

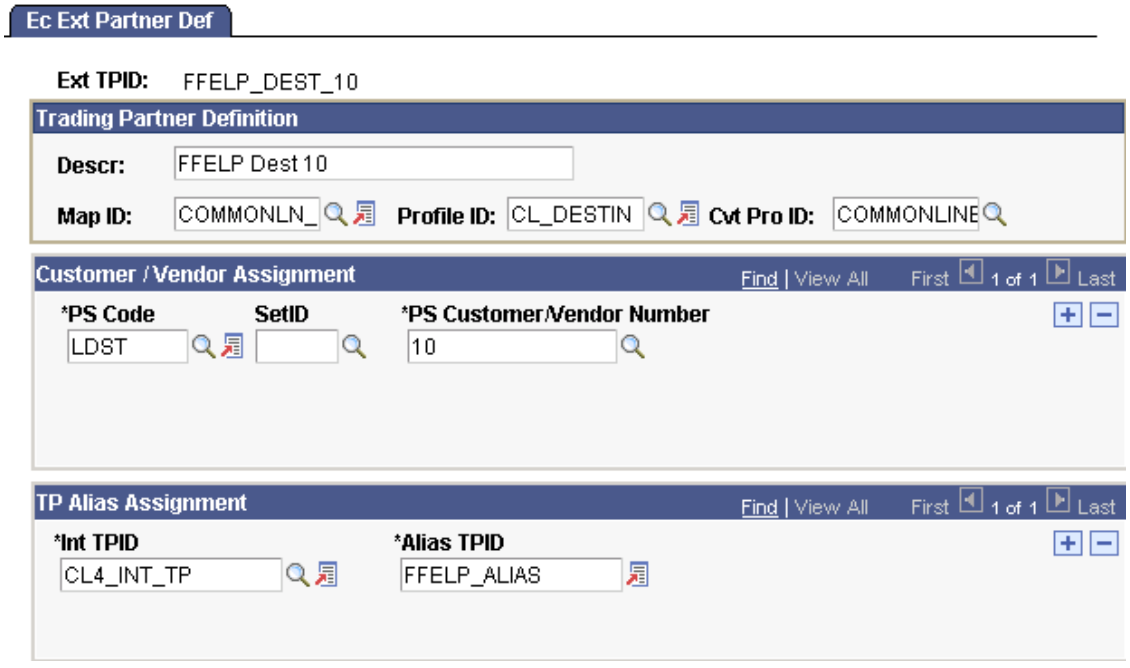
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Field or Control	Description
Ext TPID (external trading partner identification)	Indicate the external trading partner ID with whom this internal partner exchanges data. This field cannot be completed until the EC Ext Partner Def page is set up. The system populates the corresponding section on the EC Ext Partner Def page with the EDI internal partner values. **Note:** If you are creating the internal trading partner for the first time, leave this section blank until you have created external trading partners. When you create external trading partners, the system populates this section with external trading partner information.
Alias TPID (alias trading partner identification)	Enter an alias code or the name used for your external trading partner. In the example page, an alias trading partner ID called FFELP_ALIAS has been created.

Setting Up EDI External Partners

Access the EC Ext Partner Def page (**PeopleTools**, and then **EDI Manager**, and then **Set Up Trading Partners**, and then **External Partners**, and then **Ec ExtPartner Def**).

This example illustrates the fields and controls on the EC Ext Partner Def page. You can find definitions for the fields and controls later on this page.



An external trading partner record must exist for each loan destination that receives CommonLine application send files. To better organize external trading partners, include the loan program and destination number as part of the external trading partner ID.

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Trading Partner Definition

Field or Control	Description
Map ID	Select the EDI data map set to use. Use the following value to create CommonLine 4 files: *COMMONLN_4:* Contains data maps formatted for CommonLine 4.
Profile ID	Select an ID to define EDI outbound file creation parameters for the external trading partner. Profile ID records are created with the EDI Partner Profile page. For CommonLine, the predefined value, *CL_DESTIN ID* defines where loan files generated by running the EDI outbound file build process should be deposited. Be sure to assign the correct profile ID value if you have created additional partner profiles for external trading partners.
Cvt Pro Ids (conversion data profile IDs)	Select a conversion data profile ID to assign data conversion rules for different EDI transactions. You should always use the delivered CommonLine ID. Select: *COMMONLINE:* CommonLine data conversion.

Customer/Vendor Assignment

Field or Control	Description
PS Code	Select the EDI entity code that represents your external trading partners. You should use the predefined code *LDST*.
SetID	Leave this field blank if you are not using a setID to control EDI outbound files. If you use a setID, it must match the financial aid business unit entity code defined in the FA EDI Destination page.
PS Customer/Vendor Number	Select a loan destination. The destination only works if you use LDST for your PS Code value.
Int TPID (internal trading partner identification)	Select the internal trading partner ID that you have set up on the EDI Internal Trading Partner page.
Alias TPID (alias trading partner identification)	This field forms part of a link between external and internal EDI trading partners. **Note:** For CommonLine loan processing, you must use the designated alias trading partner ID at your institution consistently for all CommonLine external trading partners. For example, the example page shown uses an ID of FFELP_ALIAS. This value is used for all CommonLine external trading partners.

After you complete the setup of an external trading partner record, the system updates the internal trading partner record with the external trading partner information. You can view this in the TP ID Alias Definition section of the EC Int Partner Def page.

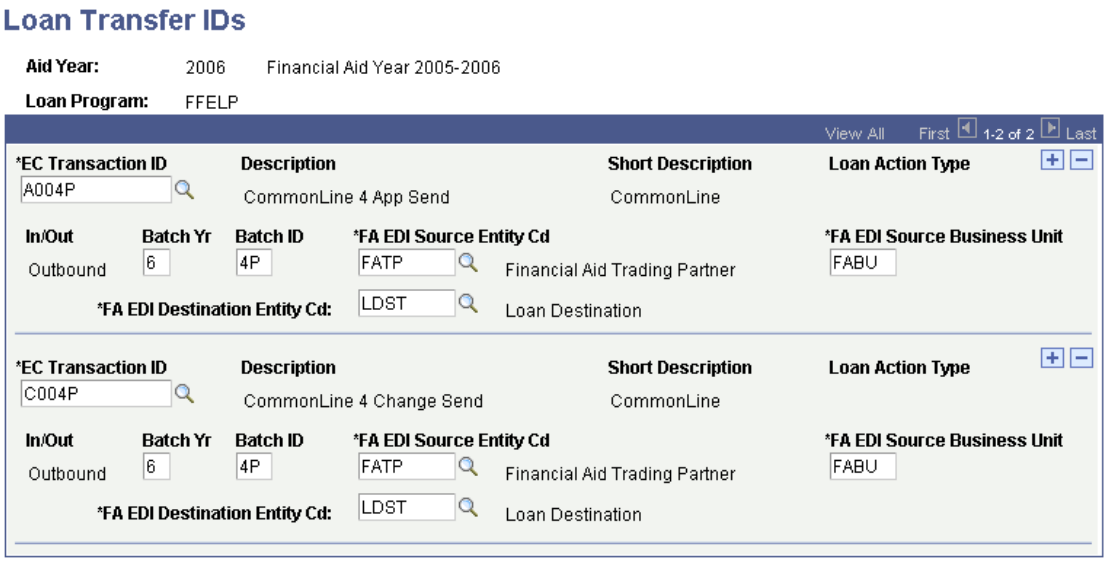
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This setup creates the linkage between the internal trading partner (the school), external trading partners (the loan destinations), and the EDI transaction sets (EDI data maps) to run when you create CommonLine application and change files.

Setting Up Loan Transfer IDs

Access the Loan Transfer IDs page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Transfer ID**, and then **Loan Transfer IDs**).

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



The following table lists the outbound EC transaction IDs for CommonLine FFELP and alternative loan programs.

Entity Code Transaction ID	Description	Direction
A004P	CommonLine 4 App Send	Outbound
C004P	CommonLine 4 Change Send	Outbound

Field or Control	Description
EC Transaction ID (electronic commerce transaction identification)	Select the electronic commerce transaction identification.
Loan Action Type	This field is not used for CommonLine.
In/Out	Indicates whether the file is inbound or outbound.
Batch Yr (batch year)	Enter the last digit of the appropriate aid year.
Batch ID	Always enter 4P. This is a CommonLine 4 requirement.

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Field or Control	Description
FA EDI Source Entity Cd (FA EDI source entity code)	Identify the appropriate code for your institution. For most institutions, the source entity code is *FATP*.
FA EDI Source Business Unit	The system populates this field after you select an EDI source entity code. The default value should be *FABU*. This field enables EDI Manager to retrieve and generate the appropriate file structure.
FA EDI Destination Entity Cd (FA EDI destination entity code)	Identify the appropriate code for the loan destination. For most institutions, the source destination code is *LDST*.

Reviewing Loan Action Codes

This section discusses how to view loan action codes.

Pages Used to Review Loan Action Codes

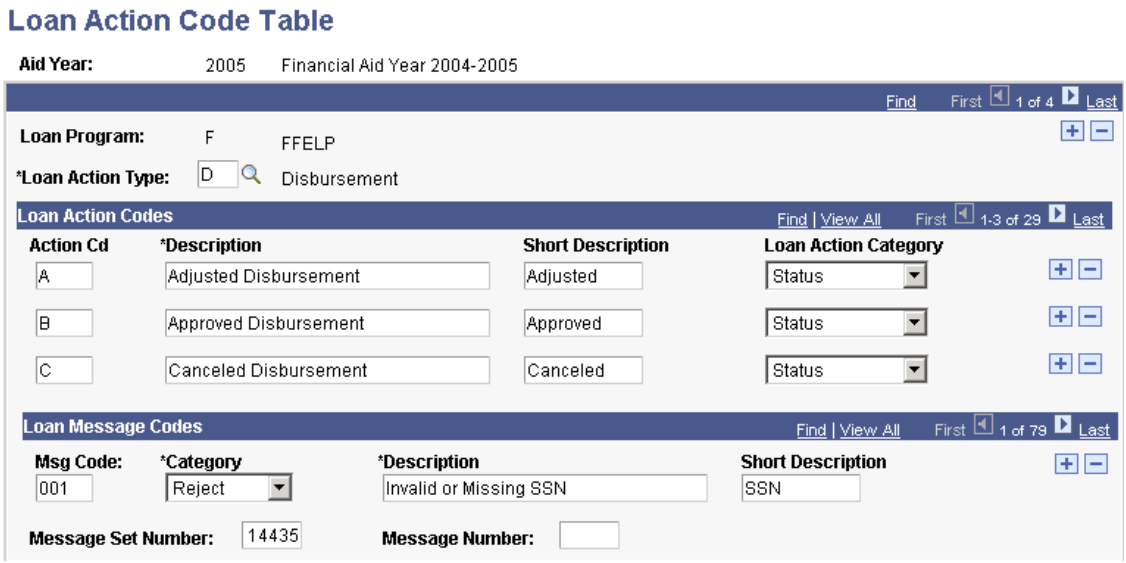
Page Name	Definition Name	Navigation	Usage
Loan Action Code Table	PS_LOAN_ACTNCD_WK00	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Action Codes**, and then **Loan Action Code Table**	View loan action codes and messages for a specific aid year and loan program.
Loan Action Codes	LOAN_ACTNCD_TBL	**Financial Aid**, and then **Loans**, and then **View Loan Action Codes**, and then **Loan Action Codes**	View loan action codes and descriptions.

Viewing Loan Action Codes

Access the Loan Action Code Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Action Codes**, and then **Loan Action Code Table**).

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

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You can modify their descriptions, but do not add or delete loan action codes and messages. The four loan action types are: *Disbursement, Origination, Promissory Note,* and *Reconciliation.*

Field or Control	Description
Loan Message Codes	Loan message codes are received by the school from the sending loan agency and are not generated by PeopleSoft loan processes.
Message Set Number and **Message Number**	These fields are used only by direct lending processes.

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11

Setting Up Common Record CommonLine (CRC)

Common Element Used in Common Record CommonLine (CRC)

Field or Control	Description
OPEID (office of postsecondary education identifier)	An identifier assigned to a school by the Department of Education.

Setting Up Loan Participants for CRC

To set up loan participants for CRC, use the Create CRC Loan Participants component (SFA_CRC_DEST_ID).

Participants in the loan process include lenders, guarantors, and loan servicers. To streamline the loan process, identify all loan participants and understand their electronic loan processing requirements and agreements with your institution. The loan participants tables are not institution or aid year specific.

This section discusses how to set up guarantors, lenders, and servicers.

Pages Used to Set Up Loan Participants

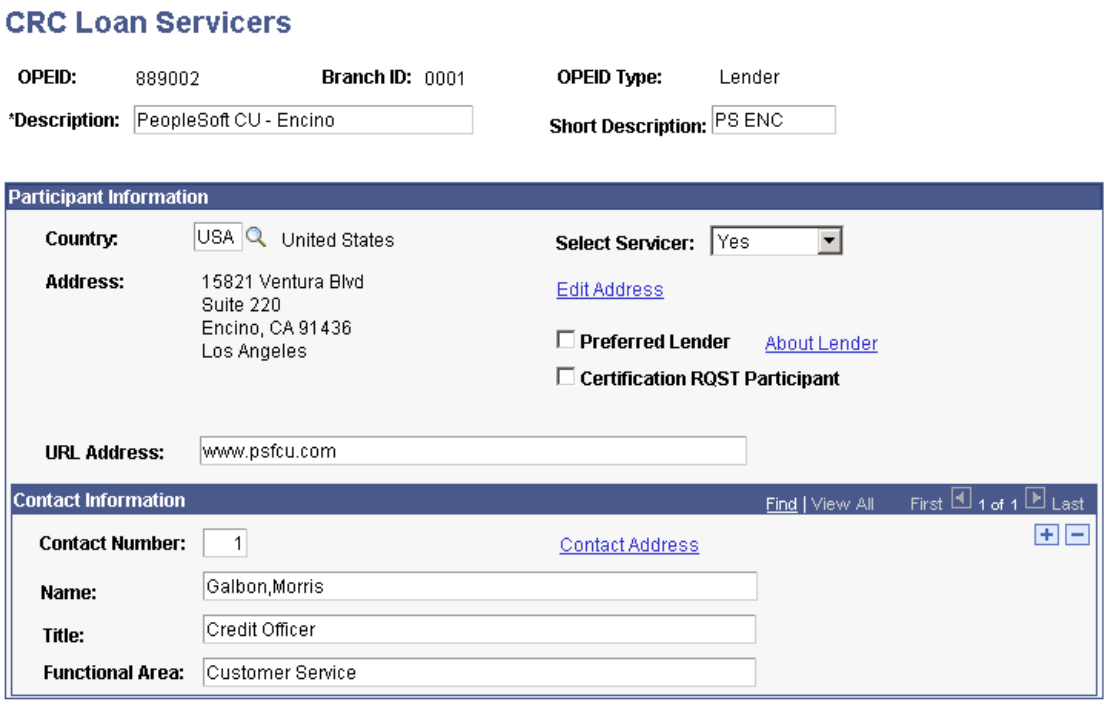
Page Name	Definition Name	Navigation	Usage
CRC Loan Servicers	SFA_CRC_DEST_ID	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Participants**, and then **CRC Loan Servicers**	View, update, or add guarantor, lender, or servicer information that process loan certification request records with your institution.
Edit Address	EO_ADDR_USA_SEC	Click the **Edit Address** link on the CRC Loan Servicers page.	Edit or view guarantor, lender, or servicer address information.
Lender Contact Information	SFA_CRC_DESTCT_SEC	Click the **Contact Address** link on the CRC Loan Servicers page.	Edit or view the country, mailing address, and email address.

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Setting Up Guarantors, Lenders, and Servicers for CRC

Access the CRC Loan Servicers page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Participants**, and then **CRC Loan Servicers**).

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



Use this page to add your guarantors, lenders, and servicers.

Field or Control	Description
OPEID (office of postsecondary education identifier)	Displays an eight-digit alphanumeric identifier assigned to a federal student aid participant by the Department of Education.
OPEID Type (office of postsecondary education identifier)	Displays the type of lending participant (guarantor, lender, or servicer) for which you are adding information.
Select Servicer	Indicates whether the loan servicer is selected to be an active business partner with the school. Select *Yes* or *No*.
Preferred Lender	Select this check box to make this lender available for self-service lender selection by the student.
Certification RQST Participant (certification request participant)	Select if the lender or loan servicer agrees to process loans using certification request.

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Field or Control	Description
Edit Address	Click to access the Edit Address page to review or update address information.
Contact Address	Click to review or update contact information.

Setting Up Loan Types for CRC

To set up loan types for CRC, use the Create Loan Types component (LOAN_TYPE).

This section discusses how to:

- Define loan types.
- Link CommonLine loan types to NSLDS loan history information.
- Assign checklists.

Pages Used to Set Up Loan Types

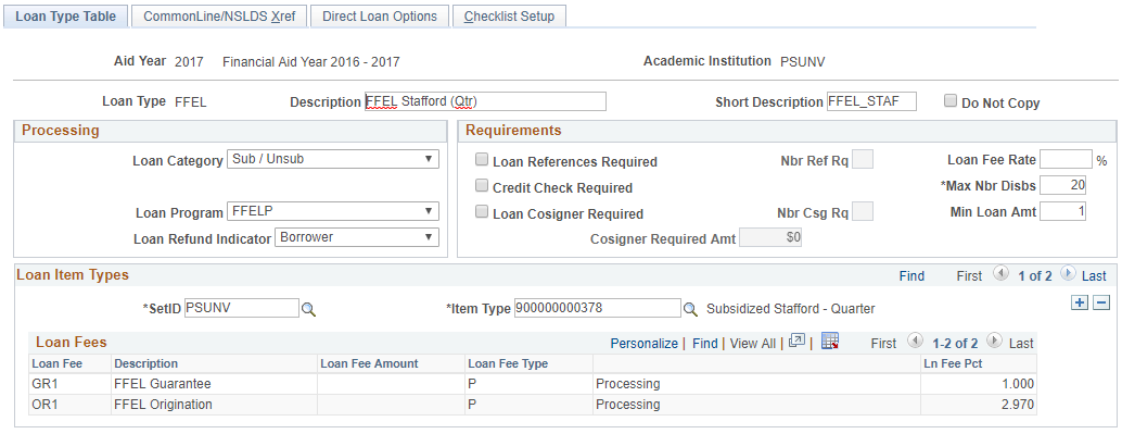
Page Name	Definition Name	Navigation	Usage
Loan Type Table	LOAN_TYPE_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Loan Type Table**	Define the types of loans your institution uses in the loan origination process.
CommonLine/NSLDS Xref	LOAN_TYPE_TABLE2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **CommonLine/NSLDS Xref**	Link federal loan types defined for CommonLine processing with the borrower's loans reported by the NSLDS.
Checklist Setup	LOAN_TYPE_DOCUMENT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Checklist Setup**	Associate a checklist to be generated when a loan is originated.

Defining Loan Types

Access the Loan Type Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Loan Type Table**).

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

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When you set up a loan financial aid item type, you include specific conditions for processing the loan. You must complete the Loan Type Table page to complete the setup. Loan types are used for both CL 4 and CRC.

Processing

Field or Control	Description
Loan Category	Select from *Alt Loan* (alternative loan), *PLUS, Sub/Unsub* (subsidized/unsubsidized), *Subsidized,* and *Unsubsidized.* If you select *PLUS,* a **Graduate PLUS Indicator** check box displays. Select the check box for Grad PLUS loans.
Loan Program	Select from *Alternative,Direct, FFELP, Health, Perkins, State,* and *University.* For example, to set up Stafford loans processed through CommonLine, the loan category is Sub/Unsub and the loan program is FFELP. To set up an alternative loan program processed through CommonLine, the loan category is Alt Loan (alternative loan), and the loan program is Alternative.
Loan Refund Indicator	Select from: *Borrower:* Select to have the borrower of the loan receive any refunds or overage. For example, the borrower could be a parent or guardian for a PLUS loan. *Student:* Select to have the student to receive any refunds from the loan. You can override this field at the loan application level. Designating the student as the recipient for PLUS refunds requires additional setup in PeopleSoft Student Financials.

Requirements

The system enforces the selected requirements during loan origination and validation.

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Field or Control	Description
Loan References Required	Enter reference information on the CommonLine Promissory Note PLUS/Alt and Originate Loans components. Enter the number of references required in the **Nbr Ref Rq** (number of references required) field.
Nbr Ref Rq (number of references required)	Enter the number of references required if you selected the **Loan References Required** check box.
Credit Check Required	Select to require a credit check.
Loan Cosigner Required	If you select this check box, enter the number of cosigners required in the **Nbr Csg Rq** (number cosigners required) field.
Nbr Csg Rq (number cosigners required)	Enter the number of cosigners required if you selected the **Cosigner Required Amount** check box.
Cosigner Required Amount	Enter the minimum loan amount requiring a cosigner. Enter cosigner information on the CommonLine Promissory Note PLUS/Alt and Originate Loans components. This setting is enforced by the loan servicer.
Loan Fee Rate	Enter the loan fee rate to print on the promissory note for this loan type. Ensure that the loan fee rate matches the loan fee setup for the item type that you associate with this loan type.
Max Nbr Disbs (maximum number disbursements)	Indicates the maximum amount of disbursements.
Min Loan Amt (minimum loan amount)	Indicates the smallest amount for which a loan can be originated.

Loan Item Types

Select a setID and an item type. You can have multiple item types associated with the same loan type. You cannot share item types across multiple loan types. For example, to define FFELP Stafford loans where the loan category is Sub/Unsub, enter the subsidized and unsubsidized item types.

> **Note**
>
> Based on the business processes defined by your institution, you may need to create multiple loan types for the same loan program.

The system displays the type loan fee, loan fee amount, fee type, and loan fee percent for the item type selected. These values are associated with the item type when you set up the financial aid item type on the Loan Fee Table page.

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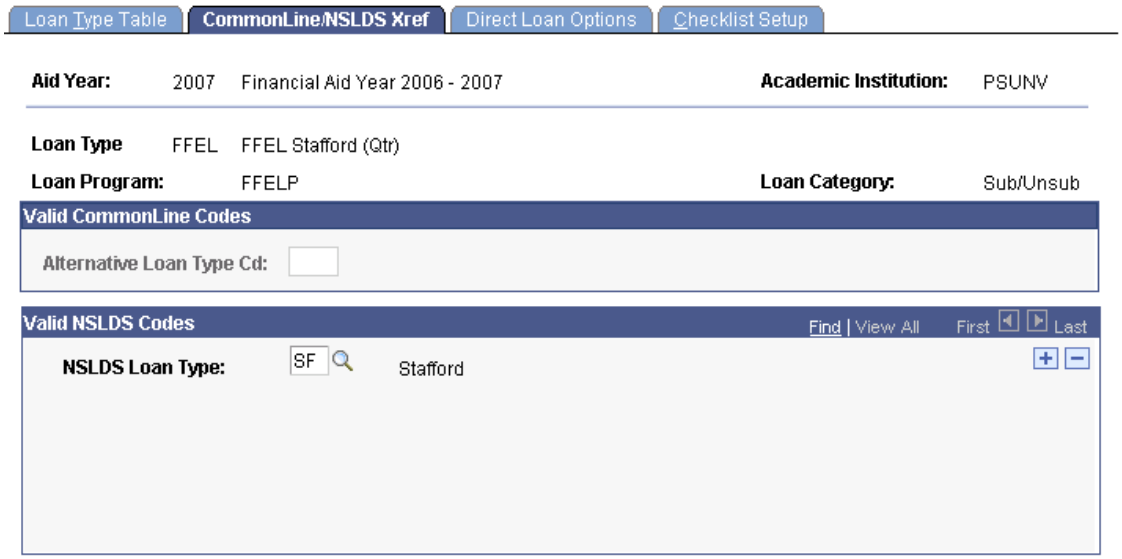
Related Topics

- Attaching Loan Fees
  Access the FA Item Type 6 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 6**).

Linking CommonLine Loan Types to NSLDS Loan History Information

Access the CommonLine/NSLDS Xref page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **CommonLine/NSLDS Xref**).

This example illustrates the fields and controls on the CommonLine/NSLDS Xref page. You can find definitions for the fields and controls later on this page.



When you originate a CommonLine loan, the system uses the information set up on this page to search for similar loans in the borrower's NSLDS history. If a prior loan is found, the system uses the prior loan information to derive the new loan's destination. This optional feature can be set up in the Loan Institution setup page.

Field or Control	Description
Alternative Loan Type Cd (alternative loan type code)	Indicates a code to notify loan agencies the type of alternative loan. Alternative loan codes are assigned by NCHER.
NSLDS Loan Type	Select a loan type to translate the NSLDS loan type that's defined in the NSLDS tables.

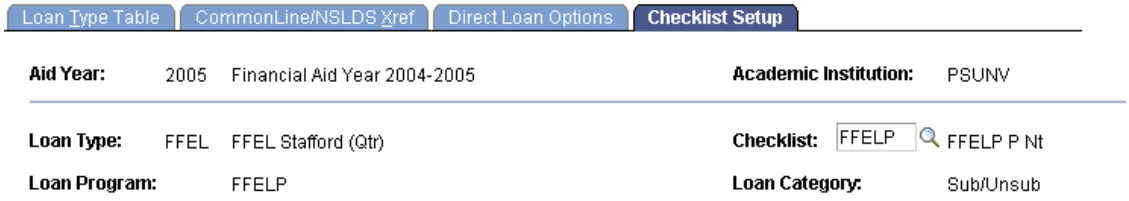
For more information, see www.ncher.us.

Assigning Checklists

Access the Checklist Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Checklist Setup**).

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



The values of the **Loan Type, Loan Program,** and **Loan Ctgry** (loan category) fields are based on the aid year and academic institution that you selected to access the page.

Field or Control	Description
Checklist	Select a checklist to be created when a loan is originated. **Note:** For Direct Loan, the system does not generate an assigned checklist during loan origination. It generates an assigned checklist when you run the print promissory note process.

Setting Up Loan Validation Edits for CRC

To set up loan validation edits for CRC, use the Maintain CRC Loan Edits component (SFA_CRC_EDITS) and Create Loan Edit Sets component (SFA_CRC_EDITDFT).

This section provides an overview on loan validation edits and discusses how to:

- Define validation edit messages.
- Create loan validation edit sets.

Related Topics

- Campus Solutions Application Fundamentals: Understanding Equation Engine

Understanding Loan Validation Edits

Loan edits verify that the loan origination data is valid for transmission to the receiving loan agency. All CommonLine loan validation edits must be defined in the Loan Edits/Message Table page. Financial Aid delivers a core set of edits to be used during loan validation. All CommonLine loan edits are equations written using the Equation Engine. Separate edits are created for both CRC and CL 4 loans. You can use the Equation Engine to create or modify equations to support loan agencies that are not defined as a CommonLine standard.

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Pages Used to Set Up Loan Validation Edits

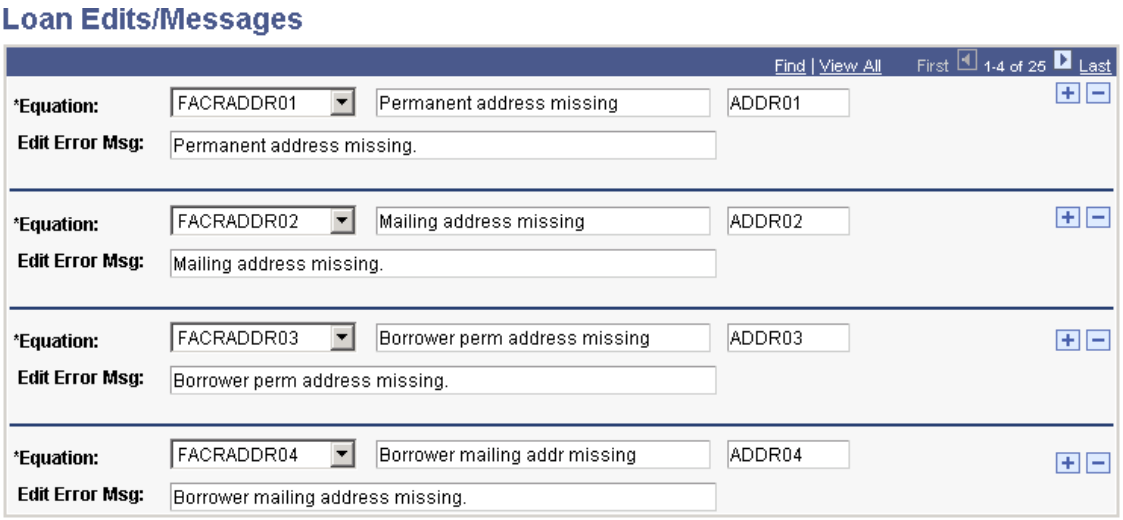
Page Name	Definition Name	Navigation	Usage
Loan Edits/Messages	SFA_CRC_EDITS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Maintain CRC Loan Edits**, and then **Load Edits/ Messages**	View delivered edits and error messages used in loan validation. You must correct all loan errors before loan data can be selected for outbound processing. You can modify the message text.
Loan Edit Defaults	SFA_CRC_EDITDFT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Edit Sets**, and then **Loan Edit Defaults**	Create loan validation edit sets that are used when constructing loan destination profile records. Loan edit default sets are logical sets of edits that can be executed based on loan program, loan category and process level. After they are added to a loan destination, you can further modify the edit sets to function according to the loan destination's business rules.

Defining Validation Edit Messages

Access the Loan Edits/Messages page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Maintain CRC Loan Edits**, and then **Load Edits/Messages**).

This example illustrates the fields and controls on the Loan Edits/Messages page.

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This page is delivered preloaded. Review and update edit error messages as needed. New loan edits created with the Equation Engine must be added to this page for the loan validation process to use them. Use the **Equation** field to select an Equation Engine equation.

The Loan Orig Edit Errors (loan origination edit errors) page in the Maintain Originated Loans component (SFA_CRC_ORIG) displays any edit errors encountered during the loan origination process.

Predefined errors are described in this table:

Equation	Description	Cause	Resolution
FACRADDR01	Permanent address missing.	Used for alternative/ PLUS loans. A valid permanent address cannot be found for the student. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.
FACRADDR02	Mailing address missing.	Used for alternative/ PLUS loans. A valid mailing address cannot be found for the student. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.

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Equation	Description	Cause	Resolution
FACRADDR03	Borrower perm address missing.	A valid permanent address cannot be found for the borrower. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address to the borrow ID that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.
FACRADDR04	Borrower mail address missing.	A valid mailing address cannot be found. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.
FACRBORROW01	Loan borrower not defined.	Used for PLUS loans. The Borrower ID field in the Maintain Originated Loans component is blank.	Enter the correct ID on the Loan Origination 1 page. Parent borrowers must already be defined in PeopleSoft Campus Community Fundamentals.
FACRCHNG01	Loan increase with undisbursed check.	Used for change transactions. A post disbursement change transaction is generated and an undisbursed check exists for the loan.	Disburse the funds to the student account or return the funds to the lender.
FACRCOSIGN01	No cosigners - cosigners required.	Used for alternative loans. If cosigners are required for the loan type, the edit verifies that the required number of cosigners are not defined in the Relationships page for the student and are also assigned to the loan.	Add the missing cosigners in the Relationships page and Maintain Originated Loans component.
FACRCOSIGN02	Cosigner signature required.	Used primarily for alternative loans. Cosigner signatures have not been entered in the Enter Alt Loan Prom Notes page.	Fix the data on the Alt Loan Prom Notes page.

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Equation	Description	Cause	Resolution
FACRDEBT01	Total student loan debt required.	Used for alternative loans. The total loan debt on the Maintain Originated Loans component is 0, and NSLDS loan history exists.	Update the total loan debt in the Maintain Originated Loan component using the Loan Demographic Data page.
FACRDEPSTAT1	Dependency Status missing.	The student's federal dependency status was missing when the loan was originated.	Use the Loan Demographic Data page to update the dependency status in the Maintain Originated Loan component.
FACRDEST01	Loan destination is zero missing.	The loan destination is not assigned after the loan has been originated. This edit is always executed by the loan validation process and cannot be deactivated.	Assign a loan destination in the Loan Origination 1 page.
FACRDISBDT01	Disbursement more than 90 days after loan period end.	A disbursement date is set for greater than 90 days beyond the loan period end date.	Change the date on the Loan Origination 2 page.
FACRDISBDT02	Disbursement date earlier than 13 days of loan period start.	The first disbursement precedes the loan period begin date by more than 13 days.	Fix the disbursement date or loan period start date in the Loan Origination 2 page.
FACRDISBDT03	Disbursement dates must be in chronological order.	Disbursement dates are not in order.	Fix disbursement dates in the Maintain Originated Loan component, Loan Origination 2 page.
FACRDRVLIC01	Borr DL Number or state missing.	The borrower's drivers license information was incomplete when the loan was originated.	Update the driver's license data in the Driver's License page and then use the Loan Demographic Data page to update this information in the Originate Loan component.
FACRGRADDT01	Grad date before loan end date.	The graduation date viewed in the Maintain Originated Loans component is before the end of the loan period.	Update the FA Term graduation date (if required) and then use the Loan Demographic Data page to update this graduation date in the Maintain Originated Loans component.

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Equation	Description	Cause	Resolution
FACRHOLDFED1	Disbursement hold on federal aid.	A disbursement hold on federal aid has been placed on the student.	Remove the federal aid disbursement hold on the student in the Packaging Status Summary page.
FACRNAME01	Student Name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the student's name on the Names page or modify the name usage setting to select one of the student's existing names.
FACRNAME02	Borrower name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the borrower's name on the Names page or modify the name usage setting to select one of the borrower's existing names.
FACRPER01	Loan period greater than 1 year.	The loan period defined in the Loan Origination 2 page is more than one year.	Change the loan period dates so that the loan period is less than a year.
FACRPLUS01	PLUS borrower and student SSN are the same.	A PLUS borrower cannot be the student.	Correct possible invalid relationship defined for the student. Assign a new borrower for the PLUS loan.
FACRPLUS02	No PLUS for grad students allowed.	The student has a graduate NSLDS level in the FA Term record when the loan is originated.	Cancel the loan if appropriate, or change the student's grade level to an undergraduate in the correct FA Term record. If you change the student's grade level, then you also need to use the Loan Demographic Data page to update it in the Originate Loan component.

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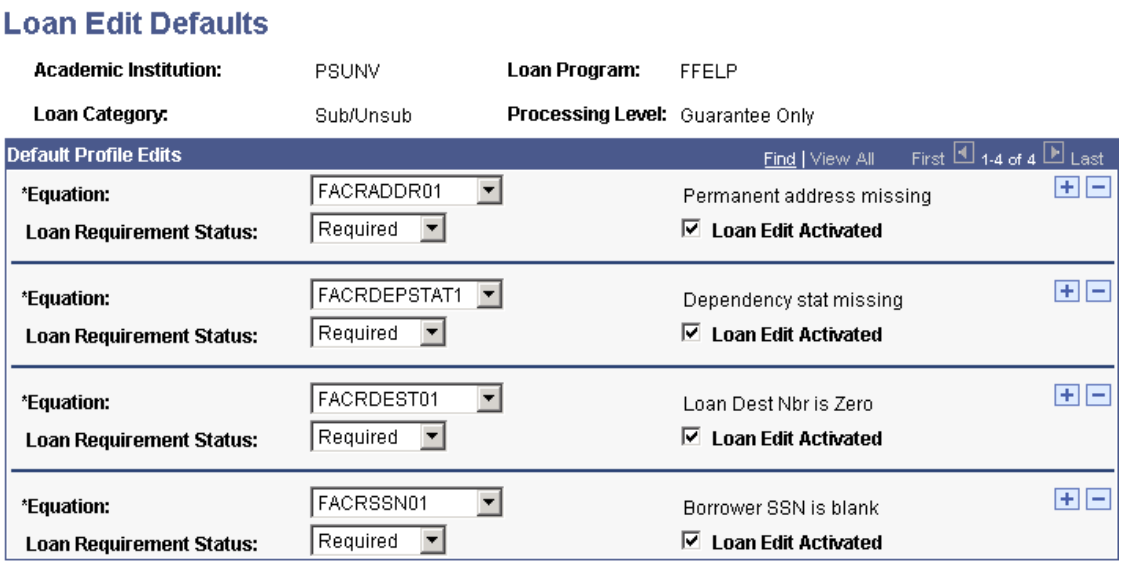
Equation	Description	Cause	Resolution
FACRPLUSMPN	Serial PLUS MPN check.	For PLUS loans. Confirms a prior PLUS loan with the same EmplID, borrower EmplID, and lender in the CommonLine MPN Usage page with the current PLUS loan.	To process serially, modify the loan record by changing the borrower or loan destination so that the borrower and lender match the information in the CommonLine MPN Use page. If the loan should be processed as a new MPN, set the Serial Loan Code field on the Loan Origination 3 page from S to N.
FACRREFS01	References missing.	The required number of references have not been defined for the student in the Relationships page and have not been assigned to the loan.	Add the missing references in the Relationships page and Maintain Originated Loans component.
FACRSRVCIN01	Service indicator exists.	An active negative service indicator is assigned to the student.	Remove the service indicator.
FACRSSN01	Borrower SSN is blank.	For PLUS and Alternative loans. When the loan was originated, either the borrower was not assigned, or the borrower ID did not have a valid Social Security Number (SSN). A valid SSN has the appropriate country code and a NID type of PR.	Verify that the borrower is assigned in the Maintain Originated Loans component. If appropriate, fix the SSN on the Biographical Details page component and then pull the SSN into the originated loan record using the Loan Demographic Data page.
FACRSSN02	Student SSN is blank.	When the loan was originated, the student did not have a valid SSN. A valid SSN has the appropriate country code and a NID type of PR.	Fix the SSN on the Biographical Details page and then pull the SSN into the originated loan record using the Loan Demographic Data page.

Creating Loan Validation Edit Sets

Access the Loan Edits Defaults page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Edit Sets**, and then **Loan Edit Defaults**).

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



Create logical sets of loan validation edits based on the loan program, loan category, and processing level. When creating loan destination profiles, the system uses these edit sets to automatically populate the loan destination edits page for the loan destination, simplifying your setup.

Field or Control	Description
Loan Program	Values are: *Alternative, FFELP, Direct Lending, Health Professions, State,* and *University.*
Loan Category	Values are: *Alt Loan* (alternative loan), *PLUS, Sub/Unsub* (subsidized/unsubsidized), *Subsidized,* and *Unsubsidized.*
Processing Level	Values are: *Direct* (not applicable), *Guarantee and Print Appl* (guarantee and print application), *Print and Guarantee, Guarantee Only, School Cert Request* (school certification request), and *Manual.*

Default Profile Edits

Define loan edits to use during validation for the selected loan program, category, and destination processing level. In addition to creating new edit sets, you can also add or delete edits, or activate or deactivate existing edits.

Field or Control	Description
Equation	Select a predefined equation. Edit equations are set up on the CRC Loan Edits/Messages page.

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Field or Control	Description
Loan Requirement Status	For each section, indicate one of the following: *Optional:* The selected section is not a requirement for the loan. *Recommended:* The selected section is not a requirement for the loan. *Required:* The selected section is a requirement for the loan. **Note:** The field value does not drive current loan functionality, but is intended to support future business processes.
Loan Edit Activated	Select to activate an edit.

Selecting Equations for the Hold and Release Process for CRC

To set up equations for the hold and release process for CommonLine loans, use the Hold and Release Equations component (LN_CLHR_EQ_NAME).

This section discusses how to select equations for the CommonLine disbursement hold and release process. This process is used for both CommonLine 4 and Common Record CommonLine loans.

Page Used to Set Equations for Hold and Release

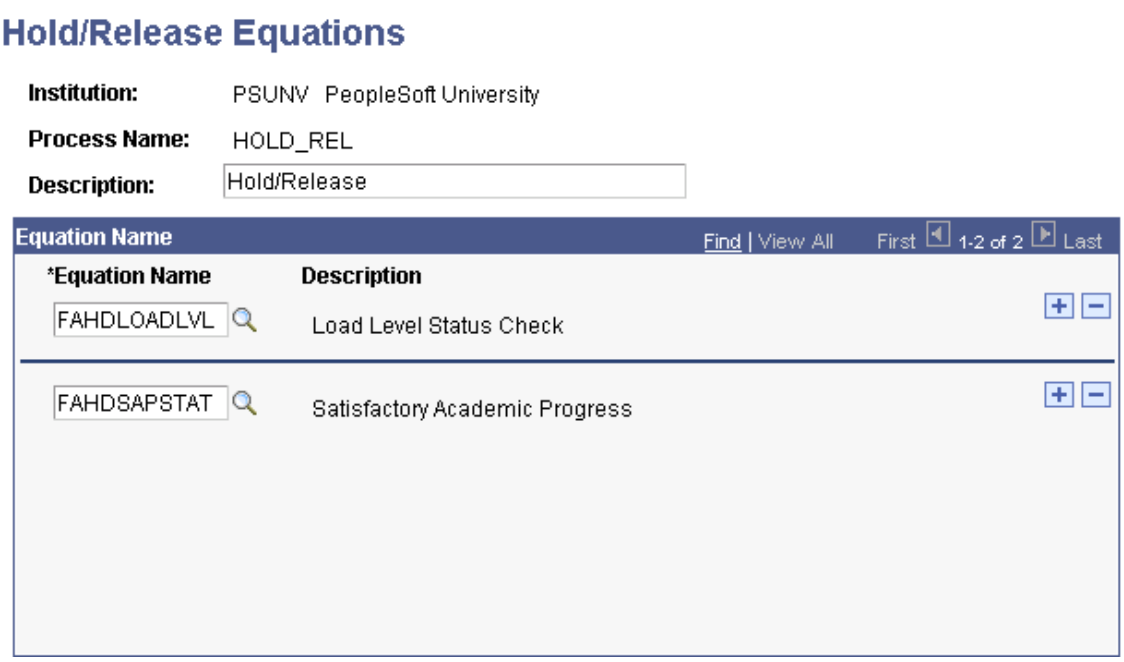
Page Name	Definition Name	Navigation	Usage
Hold/Release Equations	LN_HR_EQ_NAME_PNL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Hold and Release Equations**, and then **Hold/Release Equations**	Select the equations that you require the hold and release process to execute.

Selecting Equations for Hold and Release

Access the Hold/Release Equations page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Hold and Release Equations**, and then **Hold/Release Equations**).

This example illustrates the fields and controls on the Hold/Release Equations page. You can find definitions for the fields and controls later on this page.

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The equations that you select on this page form an equation set unique to the specified process name.

Field or Control	Description
Description	Displays the process for which you are selecting equations.
Equation Name	Select an equation. The list contains all equations created for the selected institution; select only those equations created specifically for hold and release processing.

If you use the hold and release process at your institution without modifications, create at least one hold/release equation set with the two provided hold and release equations: FAHDLOADLVL (Load Level edit) and FAHDSAPSTAT (Satisfactory Academic Progress check).

> **Note**
>
> If you create your own equations, follow the naming conventions described in the Equation Engine documentation to prevent the accidental deletion of custom equations during application upgrades.

Creating Loan Destinations for CRC

To set up loan destinations for CRC, use the Create CRC Loan Destinations component (SFA_CRC_DEST_PROF).

This section provides an overview on loan destinations for CRC and discusses how to:

- Define loan destination profiles for CRC.

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- Define loan processing levels for CRC.
- Define loan destination validation edits for CRC.

Understanding Creating Loan Destinations for CRC

Consolidate the loan participants—the lender, guarantor, and servicer—into one entity, the loan destination. The loan destination defines the business characteristics and protocols between a lender, guarantor, and servicer which enables them to process loans for the school. You must create a loan destination profile for each lender/guarantor/servicer relationship in the FFELP loan program and alternative loan program, and for the Direct Lending servicer for direct loans.

> **Note**
>
> If you continue to process loans under the CommonLine 4 protocol, you should not create active CRC loan destination profiles for the same CommonLine 4 destinations until you are ready to use them.

Page Used to Create Loan Destinations

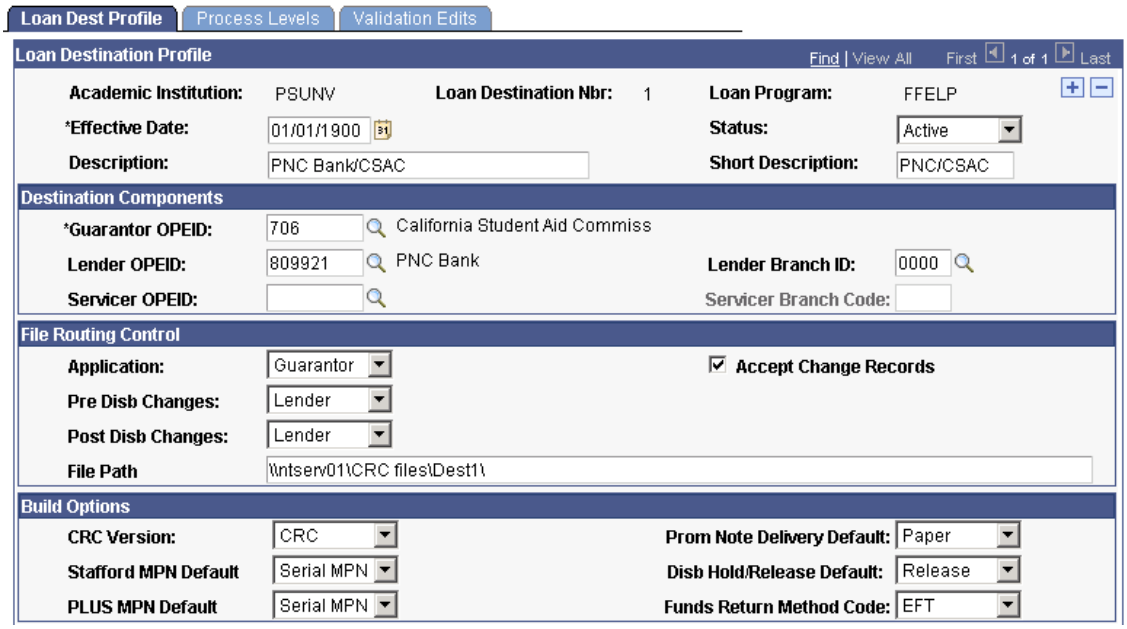
Page Name	Definition Name	Navigation	Usage
Loan Dest Profile	SFA_CRC_DEST_PROF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Destinations**, and then **Loan Dest Profile**	Define participants that your institution uses to exchange loan application data.
Process Levels	SFA_CRC_DEST_PROF2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Destinations**, and then **Process Levels**	Define the valid loan processing levels for the loan destination.
Validation Edits	SFA_CRC_DEST_EDITS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Destinations**, and then **Validation Edits**	Define the validation edits to be used for loans originated for the loan destination.

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Defining Loan Destination Profiles for CRC

Access the Loan Dest Profile page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Destinations**, and then **Loan Dest Profile**).

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



Loan Destination Profile

Field or Control	Description
Loan Destination Nbr (loan destination number)	Indicates the loan destination number.
Effective Date	Enter the date for which this destination is valid and active.
Status	Indicates the effective status. Select *Active* or *Inactive* for the effective-dated row set.

Destination Components

Field or Control	Description
Guarantor OPEID, Lender OPEID, Servicer OPEID (office of postsecondary education identifier)	Indicates the numeric identifier assigned by the Department of Education.
Lender Branch ID	Indicates the lender branch ID. This field is required if a Lender OPEID value exists.
Servicer Branch Code	Indicates the servicer branch code. This field is required if a Servicer OPEID value exists.

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File Routing Control

Field or Control	Description
Application	Indicates the recipient of the CRC application file. The system displays the recipient name and OPEID used on the XML document record.
Pre Disb Changes (pre disbursement changes)	Indicates the recipient of the CRC change file. The system displays the recipient name and OPEID used on the XML document record.
Post Disb Changes (post disbursement changes)	Indicates the recipient of the CRC change file. The system displays the recipient name and OPEID used on the XML document record.
File Path	Indicates the physical location in your production environment where the CRC XML files are to be created. **Note:** The correct syntax of the path statement is dependent on the schools operating systems. The path must end in a closing character (a back slash or forward slash).
Accept Change Records	Select this check box to indicate that the loan destination accepts change records. The **Pre Disb Changes** and **Post Disb Changes** fields are not be accessible if the loan destination does not accept changes.

Build Options

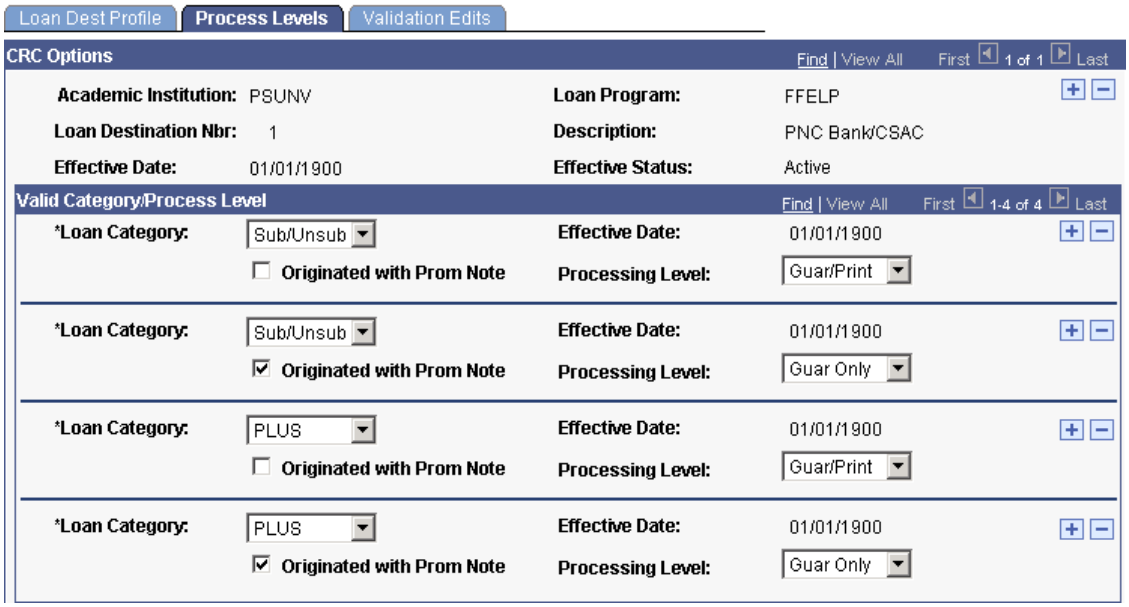
Field or Control	Description
CRC Version	Select *CRC* to indicate the CommonLine protocol the loan destination supports.
Stafford MPN Process Default	Select *New MPN* or *Serial MPN* to indicate the default serial MPN indicator to assign during origination.
PLUS MPN Process Default	Select *New MPN* or *Serial MPN* to indicate the default serial MPN indicator to assign during origination.
Prom Note Delivery Default (promissory note delivery default)	Select *Email,Paper,* or *Web* to establish the default method for delivering promissory notes to the lender.
Disb Hold/Release Default (disbursement hold/release default)	Select *Hold, No Support,* or *Release* to establish the disbursement hold/release status to assign during origination.
Funds Return Method Code	Select *Borr Check, EFT, Master Chk,*or *Netting* to establish the method for which funds are returned by the school to the lender or disbursing agent.

Defining Loan Processing Levels for CRC

Access the Process Levels page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Destinations**, and then **Process Levels**).

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



Define the valid process levels the loan destination supports. The loan origination process uses these setting to determine the correct process level to assign during the loan origination process.

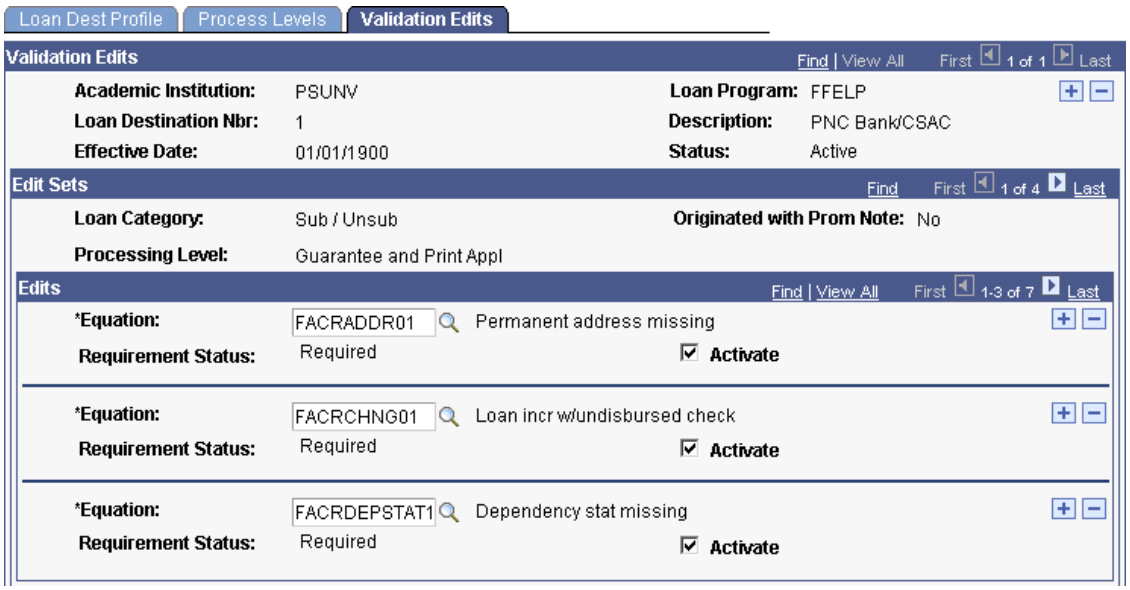
Field or Control	Description
Loan Category	Select from: *Alt Loan* (alternative loan), *PLUS*, *Sub/Unsub* (subsidized/unsubsidized), *Subsidized*, and *Unsubsidized*. The values to use are dependent on the loan categories used to define the loan types at the school.
Originated with Prom Note	Select the check box to indicate that the corresponding process level be used during origination. The loan origination process determines the process level based on whether a promissory note exists at the school for a student.
Processing Level	Select the loan processing level that the loan destination performs for the corresponding loan category. Select from: *Cert Req* (certification request), *Direct* (Direct Lending. This is not a valid selection), *Guar Only* (guarantee only), *Guar/Print* (guarantee and print), *Manual* (loan is not transmitted electronically), and *Print/Guar* (print and guarantee).

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Defining Loan Destination Validation Edits for CRC

Access the Validation Edits page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Loan Destinations**, and then **Validation Edits**).

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



This page defines the loan validation edits for the loan destination. The edits are pre-populated from the Loan Edits Defaults page when process level rows are created on the Process Levels page. Insert additional edits or remove invalid edits that are specific to the loan destination.

Field or Control	Description
Equation	Select a predefined edit statement.
Activate	Select to activate an edit.

Specifying Loan Processes for CRC

To set up loan processes for CRC, use the Define Loan Institutions component (LOAN_INST_TABLE).

This section discusses how to define loan processes for CRC.

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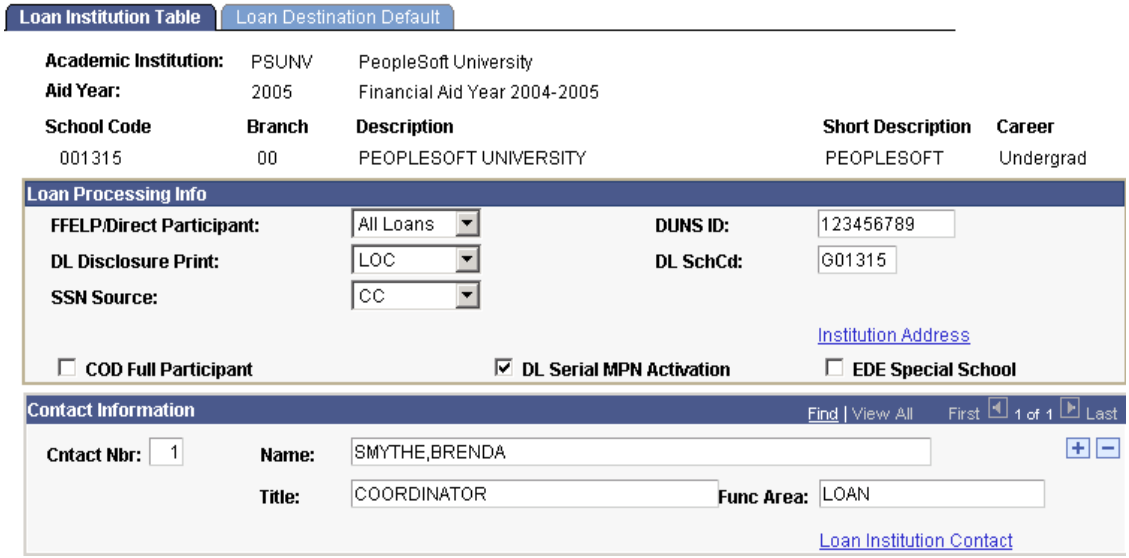
Pages Used to Set Up Loan Processes

Page Name	Definition Name	Navigation	Usage
Loan Institution Table	LOAN_INST_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Institution Table**	Define how your school processes loans for the academic year. You can define loan processes for each academic career of your institution.
Loan Institution Address Information	LN_INST_ADDR_SEC	Click the **Institution Address** link on the Loan Institution Table page.	Enter address information for each loan institution.
Loan Institution Contact Information	LN_INST_CNTCT_SEC	Click the **Loan Institution Contact** link on the Loan Institution Table page.	Update the address, mailbox type, and mailbox identification.

Defining Loan Processes for CRC

Access the Loan Institution Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Institution Table**).

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



Set up your institution for loan processing by specifying the valid loan processes and contact information

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Field or Control	Description
FFELP/Direct Participant	Select if the loan institution can originate FFELP or direct loans, or both. Values are: *All Loans, Direct,* and *FFELP.*
DL Disclosure Print (direct lending disclosure print)	For direct lending.
DL SchCd (direct lending school code)	If your institution processes direct loans, enter your direct lending school code. This field is hidden if your school does not participate in the direct lending program.
SSN Source (social security number source)	For direct loans. Select the source of the student's Social Security Number, such as from Campus Community.
COD Full Participant	Select if your institution is a full COD participant.
DL Serial MPN Activation (direct loan serial master promissory note activation)	Select if the loan institution that you are defining uses the direct loan serial master promissory note. This field is hidden if your school does not participate in the direct lending program.
EDE Special School (electronic data express special school)	For direct loans. Select to set an identification trigger on the origination file. This is for schools approved by the Department of Education for special consideration for direct loan processing by the Loan Origination Center (LOC). Usually the default rate for the school must be lower than 10%.
Cntact Nbr (contact number)	Enter contact information for each financial aid administrator in charge of loan processing. Assign a contact number for each entry.
Institution Address	Click to access the Loan Institution Address Information page.
Loan Institution Contact	Click to access the Loan Institution Contact Information page and update the address, mailbox type, and mailbox identification.

Setting Up Loan Origination for CRC

To set up loan origination for CRC, use the Reassign Loan Agencies component (LN_AGENCY_DFLT) and Define Loan Institutions component (LOAN_INST_TABLE).

This section provides an overview of loan origination and discusses how to:

- Specify a default loan agency for CRC.
- Set up loan destination defaults for CRC.

Understanding Loan Origination for CRC

Because CommonLine 4 process levels only require a guarantor to originate a loan, the loan destination that you use to originate the loan might not be the same loan destination that you use to guarantee the loan.

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Loan origination follows a seven-step process to determine the lender and guarantor and then determine the loan destination. You determine which steps to follow when you set destination defaults.

Step	What Happens	Possible Information Selected
Step 1 – This step is always performed.	If an active unused promissory note is tracked, the designated lender and guarantor are selected from the form used for origination. Steps 2 through 6 are skipped.	Lender Only Guarantor Only Lender and Guarantor No Information
Step 2 – This step is always performed.	If a matching loan is originated and guaranteed in the current aid year for the borrower, the lender and guarantor are used from the earlier origination record. Steps 3 through 6 are skipped.	Lender and Guarantor No Information
Step 3 – Optional	If the student has selected a lender on a self-service page, the process uses the selected lender and skips steps 4 through 6.	Lender No information
Step 4 – Optional	The origination process looks back one year for a prior year originated loan of the same loan type. If a prior loan is found, steps 5 and 6 are skipped.	Lender and Guarantor No Information
Step 5 – Optional	The origination process looks at the current NSLDS history to find a previously originated loan of the same loan type. A new NSLDS loan type cross reference section is available in the Loan Type Table component to facilitate this step. If a prior loan is found, step 6 is skipped. **Note:** Only the guarantor is used from the NSLDS loan history.	Guarantor Only No Information
Step 6 – Optional	A default destination is assigned. User can assign a default CL 4 or CRC destination number.	Lender Only Guarantor Only Lender and Guarantor No Information
Step 7 – This step is always performed.	Checks the validity of the selected lender and guarantor values and reassigns lender and guarantor IDs as defined in the Agency Default page.	Lender Only Guarantor Only Lender and Guarantor No Information

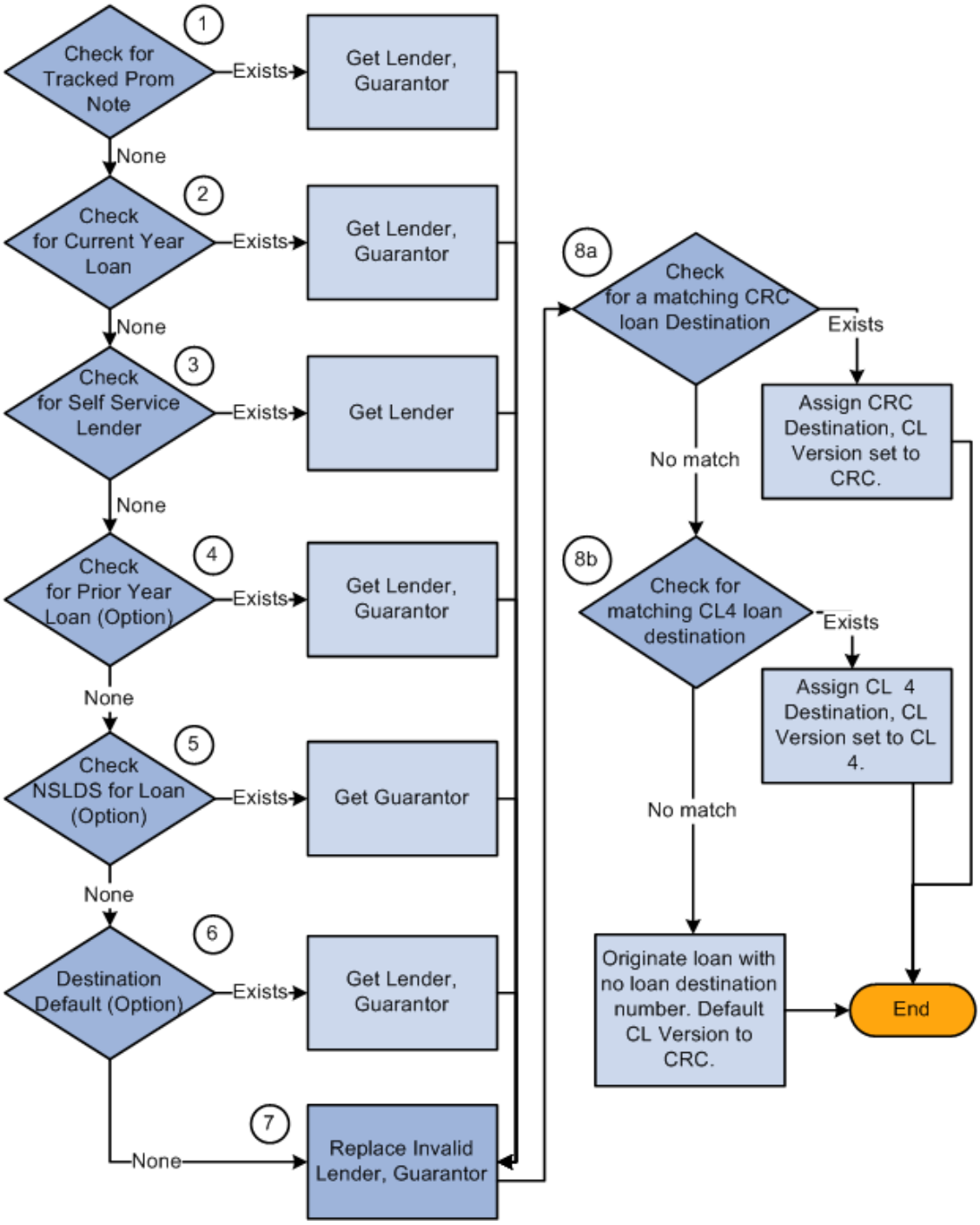
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Step	What Happens	Possible Information Selected
Step 8	Based on the lender, guarantor, and servicer information selected in the prior six steps, the loan origination process searches for a matching CRC loan destination profile record. If one is not found, the CL 4 loan destination profile records are checked for a matching record. If one is not found, the loan is still originated, but it cannot be transmitted until a loan destination is assigned.	Loan Destination No Destination

The following chart illustrates the process:

Process flow to determine loan destination

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Pages Used to Set Up Loan Origination for CRC

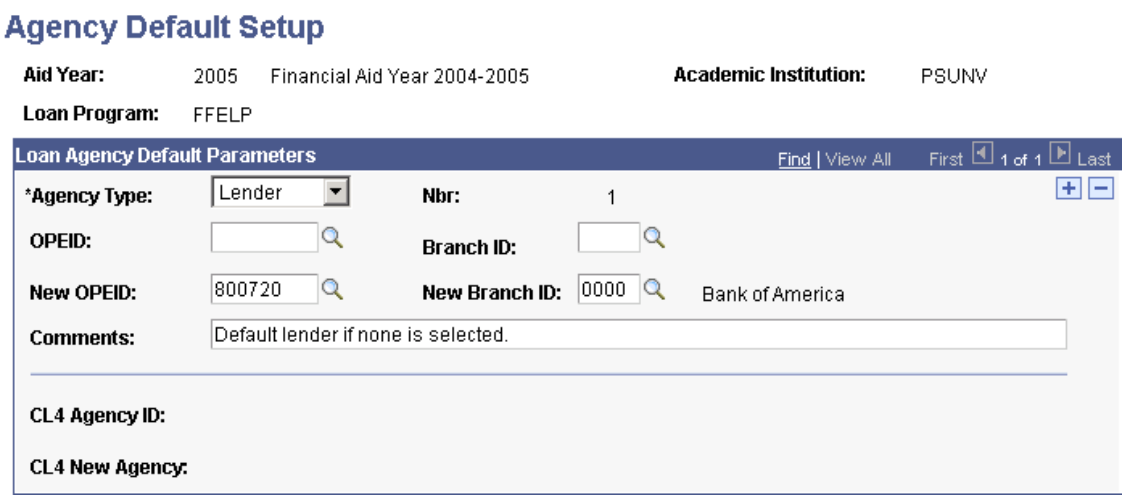
Page Name	Definition Name	Navigation	Usage
Agency Default Setup	LN_AGENCY_DFLT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Reassign Loan Agencies**, and then **Agency Default Setup**	Identify a default agency if the borrower does not select a lender, guarantor, or servicer. Identify lenders, guarantors, or servicers that are no longer in service and have them replaced automatically with a new agency when a loan is originated. **Note:** Schools that have defined loan agency default records for CL 4 loan processing for the aid years that are still active must update the records using the new CRC fields. The CL 4 setting is ignored by the loan origination process.
Loan Destination Default	LOAN_INST_TABLE2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Destination Default**	Set up loan destination default parameters.

Specifying a Default Loan Agency for CRC

Access the Agency Default Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Reassign Loan Agencies**, and then **Agency Default Setup**).

This example illustrates the fields and controls on the Agency Default Setup page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Agency Type	Select from *Guar/Ins* (guarantor/insurer), *Lender*, or *Servicer*.
OPEID (office of postsecondary education identifier)	Select the identifier of the loan agency that to be reassigned or leave blank if you are setting a default agency.
Branch ID	Select the branch identification of the OPEID.
New OPEID (office of postsecondary education identifier)	Select the identifier assigned to your school by the Department of Education.
New Branch ID	Select the branch identification of the new OPEID.

> **Note**
>
> Customers who have upgraded from a previous release of Campus Solutions see their original CL 4 loan agency default settings.

Field or Control	Description
CL4 Agency ID	Indicates the lender or guarantor ID of previously stored agency default data. The system displays the name and OPEID of the agency if not blank.
CL4 New Agency	Indicates the lender or guarantor ID of previously stored agency default data. The system displays the name and OPEID of the agency if not blank.

Setting Up Loan Destination Defaults for CRC

Access the Loan Destination Default page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Destination Default**).

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



The order the loan origination process uses to choose the loan destination for the student is as follows: Current Promissory Note, Current Year Originations, Check Prior Year Originations, Check NSLDS for Guarantor, and then Default Destination.

Field or Control	Description
Loan Program	Select from: *Alternative, Direct, FFELP, Health, Perkins, State,* and *University.*
Current Prom Note (current promissory note), **Current Year Originations**, and **Student Selected Lender**	The loan origination process always performs these steps.
Check Prior Year Originations and **Check NSLDS for Guarantor**	Select to have the system perform these steps.
Default Destination	If nothing results from the first four search methods, the system uses this default destination.
Use CRC Destination	Select to control the searching of the default loan destination profile. If not selected, the system only searches CL 4 destinations. If selected, the system only searches CRC loan destinations. **Note:** Choosing a CL 4 or CRC loan destination does not guarantee that the originated loan uses the same CommonLine version—the system continues to perform the loan origination logic.

Setting Up Process Demographic Data for CRC

To set up process demographic data for CRC, use the Define Demographic Data Use component (FA_PRCSDEMO_TBL). The loan origination process extracts borrowers' demographic information from Campus Community.

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This section discusses how to set up process demographic data for CRC.

Pages Used to Set Up Demographic Data for CRC

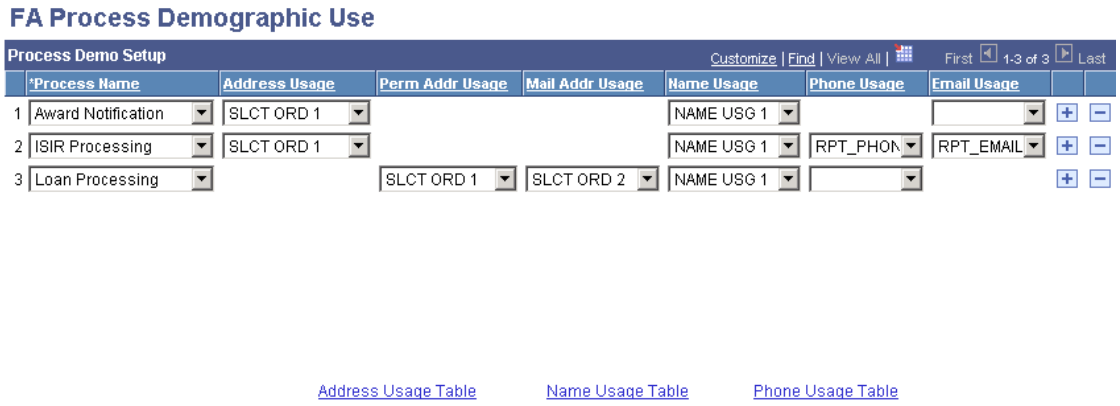
Page Name	Definition Name	Navigation	Usage
FA Process Demographic Use	FA_PRCSDEMO_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**	Indicates how to retrieve the student demographic information for loan processing. The loan origination process extracts borrowers' demographic information from Campus Community.
Address Usage	ADDR_USAGE_TABLE	• Click the **Address Usage Table** link on the FA Process Demographic Use page. • Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table	Define hierarchies of address types to search for and use in a specific usage. The FA Process Demographic Use page selects the appropriate constructs defined in this page to determine the addresses to use in loan processing.
Name Usage	NAME_USAGE_TABLE	• Click the **Name Usage Table** link on the FA Process Demographic Use page. • Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table	Define hierarchies of name types to search for and use in a specific usage. The FA Process Demographic Use page selects the appropriate constructs defined in this page to determine the names to use in loan processing.
Phone Usage	PHONE_USAGE_TABLE	• Click the Phone Usage link on the FA Process Demographic Use page. • Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Phone Usage Table, Phone Usage	Define phone usages to specify the hierarchies of telephone types to search for and use in a specific usage.

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Setting Up Process Demographic Data for CRC

Access the FA Process Demographic Data page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**).

This example illustrates the fields and controls on the FA Process Demographic Use page. You can find definitions for the fields and controls later on this page.



The system displays settings defined by Campus Community components.

Field or Control	Description
Address Usage	Used to select the address used by the associated process. Not used for loans.
Perm Addr Usage (permanent address usage)	Used to select the permanent address for loan processing.
Mail Addr Usage (mail address usage)	Used to select the temporary address for loan processing.
Name Usage	Used to select the name for use by the associated process. For loans, this selects the name for the student and borrower.
Phone Usage	. Used to select the phone number for use by the associated process.
Email Usage	Indicates the type of email address, such as home, business, dorm, or campus. Used to select email usage table settings defined in Campus Community setup.
Address Usage Table	Click to access the Address Usage page to define or review address usages.
Name Usage Table	Click to access the Name Usage page to define or review name usages.
Phone Usage Table	Click to access the Phone Usage page to define or review phone usages.

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Related Topics

- Campus Community Fundamentals: Establishing Name Usages

Setting Up Certification Requests for CRC

This section discusses how to define search match criteria for CRC.

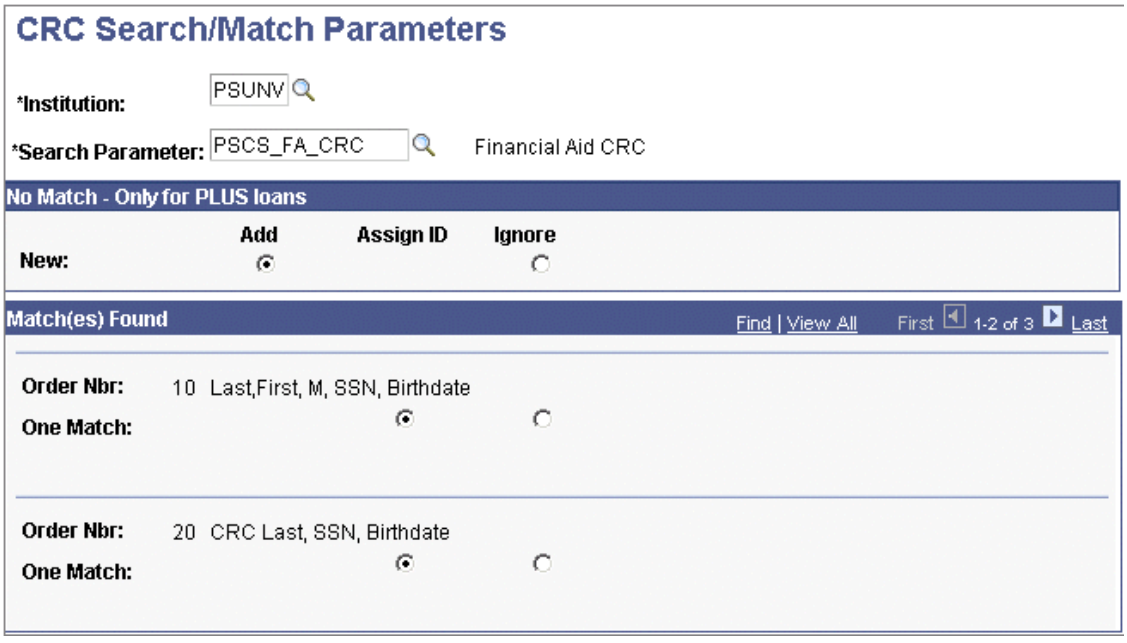
Page Used to Set Up Certification Requests

Page Name	Definition Name	Navigation	Usage
CRC Search/Match Parameters	SFA_CRC_SRCHMCH	**Set Up SACR**, and then **Product Related**, and then **Financial aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Search Match Setup**, and then **CRC Search/ Match Parameters**	Define search match criteria for the CRC Inbound process.

Defining Search Match Criteria for CRC

Access the Create CRC Search/Match Parameters page (**Set Up SACR**, and then **Product Related**, and then **Financial aid**, and then **Loans**, and then **CR CommonLine**, and then **Create CRC Search Match Setup**, and then **CRC Search/Match Parameters**).

This example illustrates the fields and controls on the CRC Search/Match Parameters page. You can find definitions for the fields and controls later on this page.



You must first define the search parameters and rules that the Search Match process uses for the certification request process. The available fields in the certification request record that

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Search Match can use are national ID (SSN), last name, first name, middle initial, and birthdate.

Field or Control	Description
Add	Indicates that if the system does not find an EmplID, then it should create one. The system only offers this to the parent for PLUS loans.
Assign ID	Indicates that the system use the EmplID found during the search match. The option is not available for No Match if the system does not find an EmplID to assign. The **Assign ID** can represent either a student or a parent.

> **Note**
>
> The **No Match - Only for PLUS loans** group box only applies when the search match process cannot find an EmplID for the parent. The system uses the Match(es) Found section criteria for both student and parents when search match is called.

Related Topics

- Campus Community Fundamentals: Understanding Search/Match

Reviewing Loan Action Codes for CRC

To set up these codes for CRC, use the Maintain CRC Loan Action Codes component (SFA_CRC_ACTION_CD).

While most of the CommonLine action codes are shared between CL4 and CRC, CRC specific codes exist which must be maintained separately.

This section discusses how to review loan action codes.

Page Used to Review Loan Action Codes

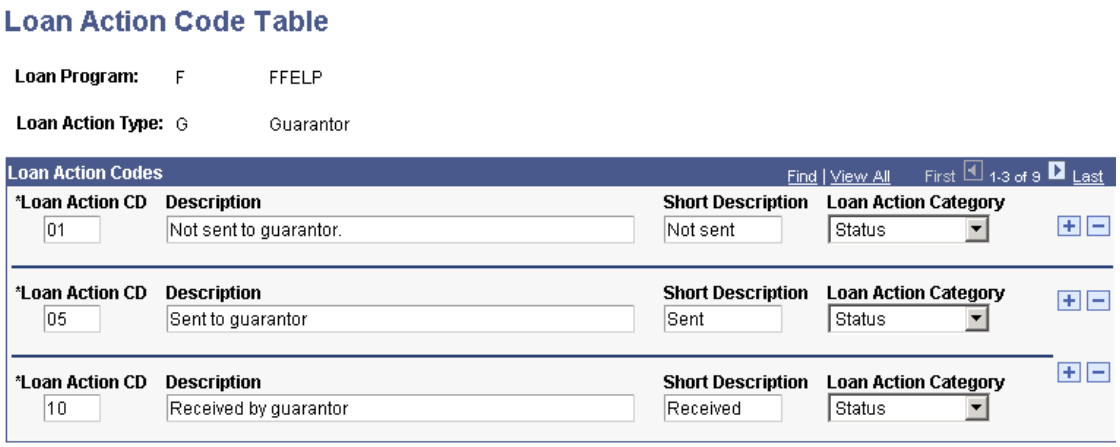
Page Name	Definition Name	Navigation	Usage
CRC Loan Action Codes	SFA_CRC_ACTION_CD	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Maintain CRC Loan Action Codes**, and then **Loan Action Code Table**	View CRC specific status codes and descriptions.

Reviewing Loan Action Codes

Access the Loan Action Code Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CR CommonLine**, and then **Maintain CRC Loan Action Codes**, and then **Loan Action Code Table**).

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



CRC specific status codes are stored in this component. You should not have to add or delete loan action codes, but you can modify the descriptions. Four loan action types are available: Guarantor, Lender, PNote (Promissory Note), and Credit. Loan action codes that are common to both CL 4 and CRC loans are stored in the CL 4 action code table.

Field or Control	Description
Loan Action Category	The values are: *Accept, Reject,* and *Status.*

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12

Setting Up Direct Loans

Overview of Direct Lending

The William D. Ford Federal Direct Loan program was established to provide long-term academic loans to qualified students who are enrolled in facilities of higher education, vocational, technical, business and trade schools. The Federal Government provides the funds for direct loans directly to the student, bypassing an outside lender. Students who receive federal direct loan funds cannot receive FFELP (federal family education loan) funds during the same enrollment period.

The three types of direct loans are:

Direct Loan Type	Loan Characteristics
Direct Subsidized Stafford Loan	A student's eligibility for a Direct Subsidized Stafford loan is determined entirely on the student's ability to demonstrate financial need. The U.S. Department of Education subsidizes the interest; therefore, the borrower is not charged interest while they are enrolled in school at least half time, and during grace and deferment periods.
Direct Unsubsidized Stafford Loan	A student is eligible for a Direct Unsubsidized Stafford loan regardless of their financial situation. Borrowers are responsible for paying the interest on these loans.
Direct PLUS Loan	Direct PLUS loans enable parents to borrow on behalf of their dependent students who are enrolled at least half time. Borrowers are responsible for paying the interest on these loans. Direct Graduate/Professional PLUS loans, or Grad PLUS loans, are intended for graduate or professional students who borrow money for themselves. The award amount equals the COA less any financial aid for FAFSA applicants.

The direct lending portion of the Financial Aid package is designed to help you process the Subsidized Stafford, Unsubsidized Stafford, and PLUS loans awarded to students attending your institution.

Before You Begin

Before you attempt to process Direct Loans, ensure that the following general Financial Aid items are set up.

- Start and end dates for your academic year on the Aid Year Table page, which are reported to COD (common origination and disbursement) on the origination file.

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- Valid terms for your careers on the Valid Terms for Career page.

  The Loan Period Start and End dates must be accurately entered on this page. When the loan origination record is built, the loan period is calculated using the earliest loan period start and latest loan period end dates from the terms contained within the disbursement plan assigned to the loan award.
- Aggregate areas for each type (subsidized and unsubsidized) of direct loan on the Aggregate Aid Limit Table page.
- Disbursement split codes and disbursement split code formulas.

  A specific disbursement split code formula is required to support the disbursement feature that allows up to 20 disbursements for both Stafford and PLUS loans and provides the ability to reserve disbursements for post-disbursement adjustments.

Setting Up Financial Aid Item Types

You use the Financial Aid Item Types component to set up financial aid item types, as described in Setting up Packaging Basics; this section is provided to help you select the correct values for Direct Loan financial aid item types. Only information specific to direct lending setup is provided.

This section discusses how to:

- Define financial aid item types.
- Set up financial aid item type awarding rules.
- Set up financial aid item type award attributes.
- Set up financial aid item type award limits.
- Set up financial aid item type disbursement rules.
- Set up financial aid item type loan fees.

Pages Used to Set Up Financial Aid Item Types

Page Name	Definition Name	Navigation	Usage
FA Item Type 1	ITEM_TYPE_FA_1	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 1**	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.
FA Item Type 2	ITEM_TYPE_FA_6	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**	Define awarding and rounding rules. Establish how the financial aid item type affects FM or IM need and enter rounding and remainder rules for the financial aid item type.

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Page Name	Definition Name	Navigation	Usage
FA Item Type 3	ITEM_TYPE_FA_3	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 3**	Define disbursement and anticipated aid rules. Update anticipated aid information, authorization for disbursement, and award letter information.
FA Item Type 4	ITEM_TYPE_FA_4	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 4**	Set minimum and maximum award limits by the type of term (term category) as required.
FA Item Type 5	ITEM_TYPE_FA_5	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 5**	Define default disbursement plans and split codes for each academic career, which enables you to enter data quickly on the award entry pages manually as well as for award rules on packaging plans.
FA Item Type 6 page	ITEM_TYP_FA_LN_FEE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 6**	Attach loan fee codes for loan item types.

Defining Financial Aid Item Types

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

This example illustrates the fields and controls on the FA Item Type 1 page.

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This table describes how to enter field information for each type of direct lending loan.

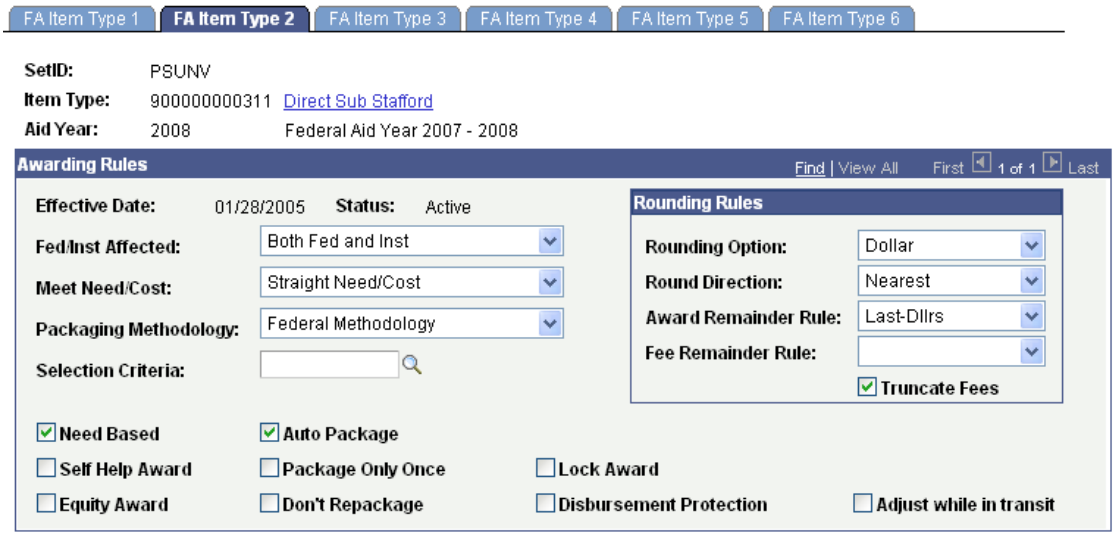
Field	Subsidized Stafford	Unsubsidized Stafford	PLUS	Graduate PLUS
Description	Enter a descriptive statement indicating a Direct Subsidized Stafford loan.	Enter a descriptive statement indicating a Direct Unsubsidized Stafford loan.	Enter a descriptive statement indicating a PLUS loan.	Enter a descriptive statement indicating a Graduate PLUS loan.
Financial Aid Type	*Loan*	*Loan*	*Loan*	*Loan*
Source	*Federal*	*Federal*	*Federal*	*Federal*
Federal ID	*Subsidized*	*Unsubsidized*	*PLUS*	*Grad PLUS*
Aggregate Area	Name of the aggregate area you set up for this type of loan.	Name of the aggregate area you set up for this type of loan.	Leave this field blank.	Leave this field blank.

Setting Up Financial Aid Item Type Awarding Rules

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

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

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The Rounding Rules entered on this page are the same for all Direct Loan types.

Field or Control	Description
Rounding Option	Select *Dollar*.
Round Direction	Select *Nearest*.
Award Remainder Rule	Select *Last-Dllrs* (last dollars).
Fee Remainder Rule	Leave this field blank.
Truncate Fees	Select this check box.

Setting Up Financial Aid Item Type Award Attributes

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

This example illustrates the fields and controls on the FA Item Type 3 page.



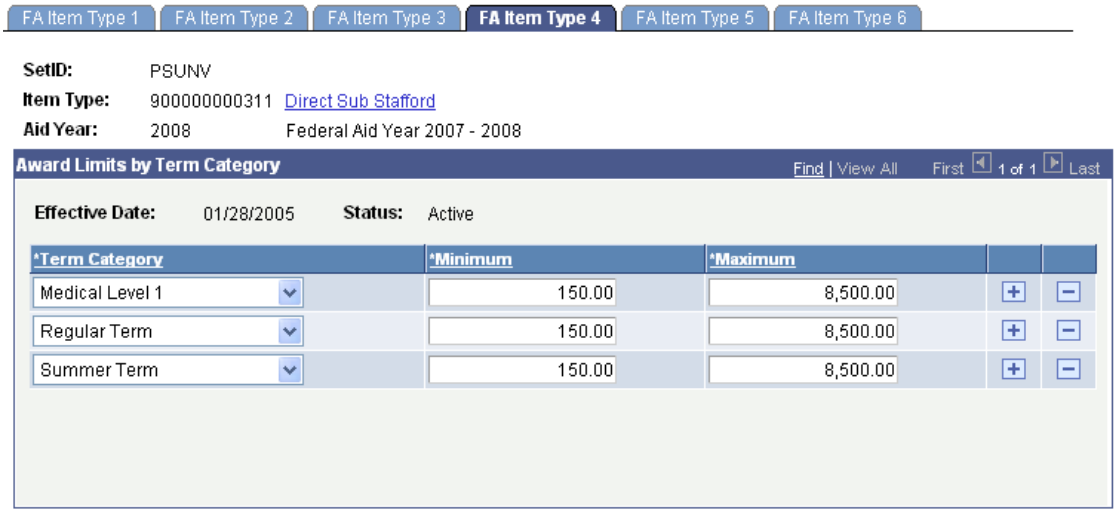
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The fields on this page are used to set up disbursement information. Set up these fields according to your institution's requirements. No specific Direct Loan requirements exist.

Setting Up Financial Aid Item Type Award Limits

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

This example illustrates the fields and controls on the FA Item Type 4 page.



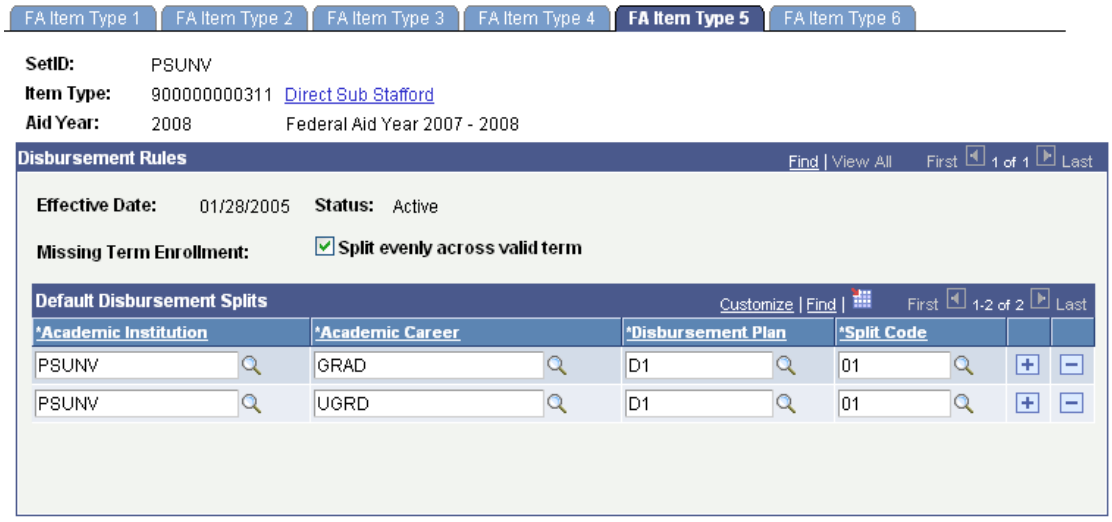
The fields on this page are used to set up your award limits by term category. Your institution defines the limits. No specific Direct Loan requirements exist.

Setting Up Financial Aid Item Type Disbursement Rules

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

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

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The field values entered on this page are the same for all Direct Loan types.

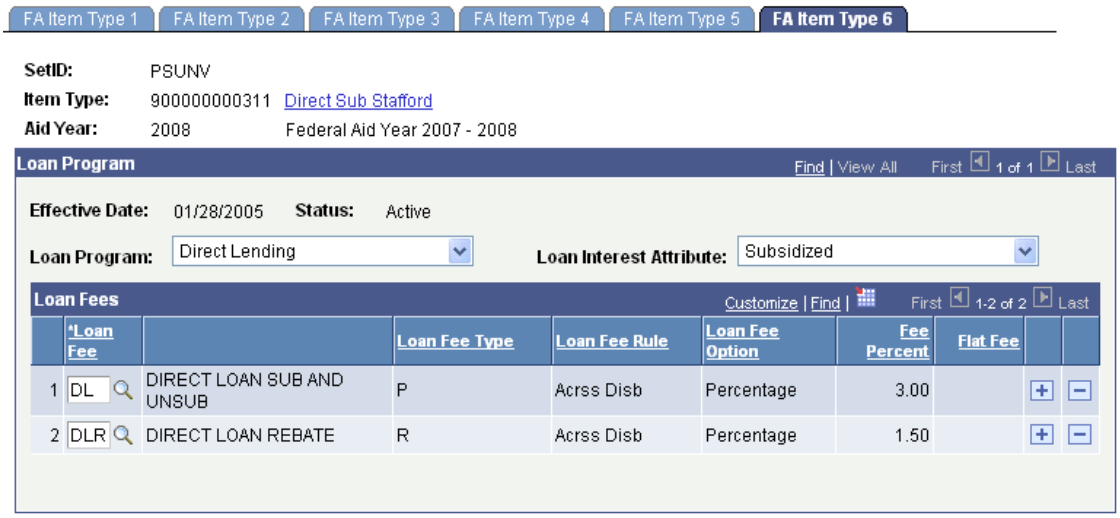
Field or Control	Description
Missing Term Enrollment	Select the **Split evenly across valid term** check box for Direct Loan setup. Disbursement plans determine the disbursements across terms, but students might not attend all terms defined for the disbursement plan. The **Missing Term Enrollment** rule allows you to specify whether to split disbursements evenly among the remaining terms for which the student is actually enrolled. For example, if the disbursement plan is for fall, winter, and spring quarters, but the student is only enrolled for fall and spring with the **Split evenly across valid term** check box selected, the award amount is split evenly between the fall and spring terms.

Setting Up Financial Aid Item Type Loan Fees

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

This example illustrates the fields and controls on the FA Item Type 6 page.

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Before you set up this page for your direct lending item types, you must create a loan fee type for your Stafford subsidized, Stafford unsubsidized, and PLUS loan types. You must also create a loan fee type for the rebate.

Field	Subsidized Stafford	Unsubsidized Stafford	PLUS or Graduate PLUS
Loan Program	Ensure that this field displays *Direct Lending*. The value comes from the aggregate area that you select on the Financial Aid Item Type 1 page.	*Direct Lending*	*Direct Lending*
Loan Interest Attribute	Ensure that this field displays *Subsidized* for subsidized Stafford loans. The value comes from the aggregate area you select on the Financial Aid Item Type 1 page.	Ensure that this field displays *Unsubsidized* for subsidized Stafford loans.	Ensure that this field displays *Unsubsidized* for PLUS or Graduate PLUS loans.
Loan Fees	Select your direct lending fee ID for subsidized Stafford loans.	Select your direct lending fee ID for unsubsidized Stafford loans.	Select your direct lending fee ID for PLUS or Graduate PLUS loans.
Loan Fees (interest rebate)	Insert a row to add interest rebate for the loan. Select the direct loan rebate fee that you set up on the Loan Fee Table page. The rebate amount is added after the loan fee percent is subtracted from the gross disbursement amount.	Same as for subsidized Stafford.	Same as for subsidized Stafford.

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Field	Subsidized Stafford	Unsubsidized Stafford	PLUS or Graduate PLUS
Fee Percentage	The loan fee values are derived from the Loan Fee Table.	The loan fee values are derived from the Loan Fee Table.	The loan fee values are derived from the Loan Fee Table.

Example of How the Direct Loan Rebate Works

A student receives a Direct Loan of 1,000.00 USD for the fall 2008 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent rebate of 15.00 USD is added back.

> **Note**
>
> Refer to the COD Technical Reference guide regarding loan and rebate fees and their criteria when a new fee goes into effect. Separate financial aid item types and associated fees may be required based on the criteria and effective date.
>
> All Direct Loan item types must have a “Loan Fee Type” (interest rebate), even if the fee rebate is equal to 0%. This attribute is necessary to support required COD reporting.

Setting Up Promissory Notes in Campus Community

Before using Master Promissory Notes (MPN) and Promissory Notes, you must complete setup procedures in PeopleSoft Campus Community and Financial Aid. The information in this section is specific to direct lending.

If you use the Create PNote Communication and Print Promissory Note processes, you can link a loan type to a specific document type.

If you have multiple loan types per loan program, you can have one checklist per loan type or you can have one checklist for all the loan types within a particular loan program.

Before setting up PeopleSoft Campus Community items for promissory notes, you should be familiar with and understand the 3Cs (communications, checklists, and comments), specifically checklists.

See Campus Community Fundamentals: Understanding the 3C Engine.

See Campus Community Fundamentals: Understanding Checklist Setup.

This table lists the items that you must create in PeopleSoft Campus Community before you can use Master Promissory Notes (MPN) and Promissory Notes in PeopleSoft Financial Aid.

> **Important**
>
> Schools can choose whether or not to use the Electronic Master Promissory Note (e-MPN) for their borrowers. If schools use the e-MPN, there is no need to print a paper version. If a borrower requests a paper MPN, the school has the option of having COD print and mail the MPN to the borrower. For more information,

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See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference*

Item	Direct Loan Information	Reference
Checklist Item	Create one checklist item code each for direct Stafford loan and direct PLUS loan type. **Note:** Be sure to use an effective date of 01/01/1900 for any rows you add.	See Campus Community Fundamentals: Defining Checklist Items.
Checklist Item Function	For the **Administrative Function** of *Loan*, insert a row for each of the checklist items that you created.	See Campus Community Fundamentals: Defining Checklist Items.
Checklist	Create one checklist each for direct Stafford loan and direct PLUS loans. Graduate PLUS loans can use the same elements as PLUS loans.	See Campus Community Fundamentals: Setting Up Checklist Templates
Checklist 3C Groups	Enter values in the **Update/ Inquiry Group.** The **Update/ Inquiry Group** values are user defined.	See Campus Community Fundamentals: Setting Up Checklist 3C Groups.
Communication Contexts	Set up a Communication Context for each checklist. Use these values: • **Method** = *Document* • **Direction** = *Outgoing* • **Letter Code** = *Loan Promissory Notes.* **Note:** The letter code is defined on the Standard Letters page in Campus Community.**Set Up SACR**, and then **Common Definitions**, and then **Communications**, and then **Standard Letter Table CS.**	See Campus Community Fundamentals: Defining Communication Contexts and Categories.
Communication Categories	Choose the **Communication Category** designated for promissory note processing. For example, PNT_08 (Pnotes for 2008). Use these values: • **Function** = *Loan* • **Communication Context** = Insert rows for each of the communication contexts that you created. **Note:** Be sure to use an effective date of 01/01/1900 for any rows that you add.	See Campus Community Fundamentals: Defining Communication Contexts and Categories.

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Item	Direct Loan Information	Reference
Communication 3C Groups	Select the **Communication Category** that you set up for promissory notes. For example, PNT_08. For the **3C Update/Inquiry Group** field, select the 3C group to which to give access for the selected communication category. This field is required for promissory note processing **Warning!** If you do not set security, users have access to the communication category and administrative function needed to run the promissory notes functionality.	See Campus Community Fundamentals: Defining 3C Groups.

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Item	Direct Loan Information	Reference
Communication Speed Keys	Add new Communication Keys for MPN and PLUS loans. When adding the Communication Comm Keys, select *Loan* as the **administrative function.** Enter or select the values for each of the listed fields. **Comm Key.** Enter *MPN* for the MPN communication key, *PLUS* for the PLUS communication key. For Health, Perkins, and university/institutional loans, give each a unique communication key. **Category.** Enter the category you set up for MPN and PLUS loan communication categories. This value should match the name of the communication category that you set up previously. **Context.** Enter *MPN* for the MPN context field, *PLUS* for the PLUS context field. **Method.** Select the method to use to deliver the promissory note. This should match the method used when setting up the context. **Direction.** Select the direction, from your institution's point of view, that the promissory note is going. For example, outgoing refers to something sent out from your institution. This should match the method used when setting up the context. **Letter Code.** Select the appropriate letter code for the type of promissory note. You can have one letter code type for all loan type, for example, a letter code of LNS (loans).	See Campus Community Fundamentals: Defining Communication Speed Keys.

Setting Up Direct Lending

To set up direct lending, use these components:

- Maintain EDI Transactions component (FA_ECTRANS).
- Create Loan Destinations component (LN_DEST_PROFILE).
- Direct Loan Change Rules component (LN_DL_INST_PARM).
- Define Loan Institutions component (LOAN_INST_TABLE).
- Loan Attended Routing ID component (SFA_COD_LN_ATTEND)

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- Maintain Loan Report Packages component (LOAN_RPT_PKGS02).
- Define Serial Promissory Notes component (LN_PNOTE_TYPE).
- Define School Servicers component (LOAN_SERVICE_TABLE).
- Maintain Loan Transfer ID component (LN_XFER_FILE_ID).
- Create Loan Types component (LOAN_TYPE).
- Credential Level Cross Reference component (SFA_COD_CRDLV_XREF).
- SULA Load Rules component (SFA_SULA_LD_TBL).
- Level/Load Rules component (LVL_ST_RULE_TBL)
- Maintain Translate Values component (PSXLATMAINT)

This section discusses how to:

- View EDI profile defaults.
- Set up loan destination profiles for Direct Lending.
- Set up global Direct Lending change parameters.
- Set up Loan Institution Table for Direct Lending COD.
- Set up destination defaults for Direct Lending.
- Set up Loan Attended Routing ID's
- Set up loan report packages for Direct Lending.
- Set up DL Serial Promissory Note table.
- Set up Loan Servicer table for Direct Lending.
- Set up loan transfer IDs for Direct Lending.
- Set up loan types for Direct Lending.
- Set up credential level cross reference.
- Set up SULA load rules.

Pages Used to Set Up Direct Lending

Page Name	Definition Name	Navigation	Usage
Financial Aid EDI Transactions	FA_ECTRANS	Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions	Define electronic data transactions.
Loan Dest Profile	LOAN_DEST_PROFILE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Commonline 4**, and then **Create Loan Destinations**, and then **Loan Dest Profile**	Define the participants your institution uses to exchange loan application data. You can designate multiple destinations for a given loan program.

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Page Name	Definition Name	Navigation	Usage
Ln Dl Inst Parm (loan direct lending institution parameter)	LN_DL_INST_PARM	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Direct Loan Change Rules**, and then **Ln Dl Inst Parm**	Set up change parameters for your institution. By setting change parameters for specific fields, you can determine how direct lending change processing handles the specified fields.
Ln Pnote Type (loan promissory note type)	LN_PNOTE_TYPE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Serial Promissory Notes**, and then **Ln Pnote Type**	Add the master promissory note (MPN), PLUS note, health, Perkins, and university/institutional loan types to the loan promissory note table. You must do this before using the promissory note functionality.
Loan Institution Table	LOAN_INST_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Institution Table**	Set up Common Origination and Disbursement (COD) for Direct Lending. Define how your school processes loans for the academic year. You must define your loan processes for each academic career at your institution.
Loan Institution Address Information	LN_INST_ADDR_SEC	Click the **Loan Institution Contact** link on the Loan Institution Table page.	Enter address information for your department that works with loans.
Loan Institution Contact Information	LN_INST_CNTCT_SEC	Click the **Loan Institution Contact** link on the Loan Institution Table page.	Enter address information for your loan contact personnel.
Loan Destination Default	LOAN_INST_TABLE2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Destination Default**	Set up your default loan destination parameters.
Loan Attended Routing ID	SFA_COD_LN_ATTEND	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Attended Routing ID**	Associate Attended School Routing ID's with Reporting School Routing ID's.

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Page Name	Definition Name	Navigation	Usage
Loan Report Packages	LN_RPT_PCKG02	**Set UP SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Report Packages**, and then **Loan Report Packages**	Define and associate loan document types to loan types.
Loan Servicer Table	LOAN_SERVICE_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine4**, and then **Define School Servicers**, and then **Loan Servicer Table**	Identify the servicers that your institution uses for processing loans. You can also use this page to add a new servicer.
Servicer Electronic Address	SERV_ADDR_SEC	Click the **Electronic Address** link on the Loan Servicer Table page.	Enter an email address for the loan servicer.
Servicer Contact Information	SERV_ADDR_SEC	Click the **Contact Address** link on the Loan Servicer Table page.	Enter address and email information for the individual contact that you entered on the Loan Servicer Table page.
Loan Transfer IDs	LN_XFER_ID_UPDT	Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Transfer ID, Loan Transfer IDs	Set up your EC transaction ID for all inbound and outbound loan file transactions.
Loan Type Table	LOAN_TYPE_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Loan Type Table**	Enter specific processing types and loan requirements for a particular loan type. You can also associate specific loan item types to the loan type.
Direct Loan Options	LOAN_TYPE_TABLE_DL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Direct Loan Options**	Specify direct lending options for the loan type setup. This page is used to define your disbursement options from Financial Aid to PeopleSoft Student Financials. Additional options define when disbursements are transmitted to the Common Origination and Disbursement (COD).

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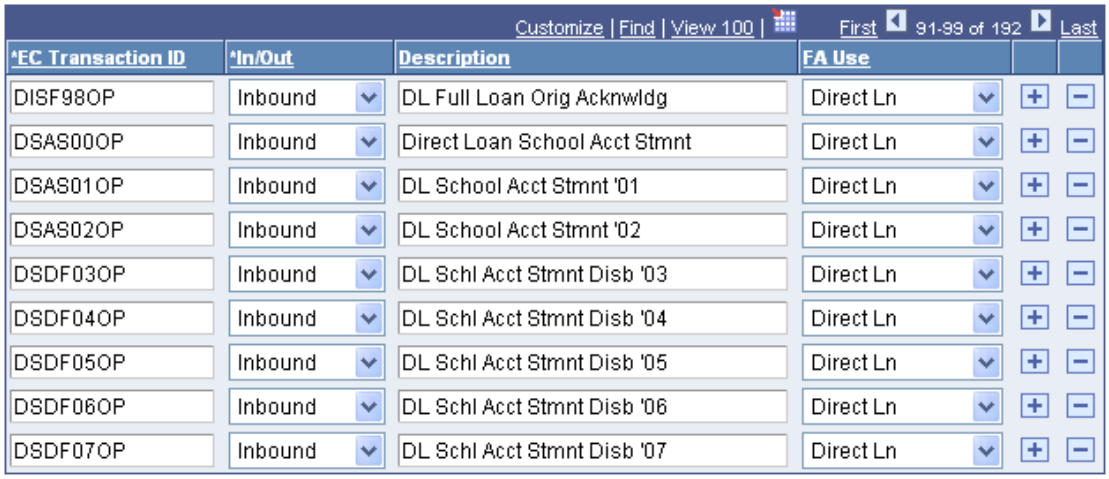
Page Name	Definition Name	Navigation	Usage
Checklist Setup	LOAN_TYPE_DOCUMENT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Checklist Setup**	Define checklist to be associated with loan type.
Credential Level Cross Reference	SFA_COD_CRDLV_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **SULA**, and then **Credential Cross Reference**	Map academic career/ academic plan/ National Student Clearinghouse (NSC) Classification combinations to COD Credential Levels.
SULA Load Rules	SFA_SULA_LD_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **COD**, and then **SULA**, and then **SULA Load Rules**	Set up COD Enrollment Status rules.
Level/Load Rules	LVL_ST_RULE_TBL	**Set Up SACR**, and then **Foundation Tables**, and then **Academic Structure**, and then **Level/Load Rules**	Define level/load rules to align with One Big Beautiful Bill (OB3) requirements. See Defining Academic Level and Load Determination Values
Maintain Translate Values	PSXLATMAINT	**PeopleTools**, and then **Utilities**, and then **Administration**, and then **Maintain Translate Values**	Define the effective date of the applicable translate values for One Big Beautiful Bill (OB3). Applicable fields: • DIR_LND_YR • DIR_LND_YR_CL

Viewing EDI Profile Defaults

Access the Financial Aid EDI Transactions page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Maintain EDI Transactions**, and then **Financial Aid EDI Transactions**).

This example illustrates the fields and controls on the Financial Aid EDIT Transactions page. You can find definitions for the fields and controls later on this page.

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The EDI Profile table defines electronic data transactions both inbound and outbound for COD processing. EDI functionality is used to exchange data from the COD system to Campus Solutions. EDI transactions support data files for Direct Loans and Pell Grant. The system updates and populates the EC Transaction ID on a regulatory basis.

Field or Control	Description
EC Transaction ID	The ID is based on the message classes used for direct lending. See the *COD Technical Reference* for further information. Use the **Add** link to add additional EC transaction IDs for this partner profile. Add all the direct lending message classes that you use at your institution.
In/Out	The system indicates whether the file is *Inbound* or *Outbound.*

Direct Lending EC Transaction IDs

The following table illustrates the value provided in your system for Direct Lending processing. File types are updated during annual regulatory releases for Direct Lending.

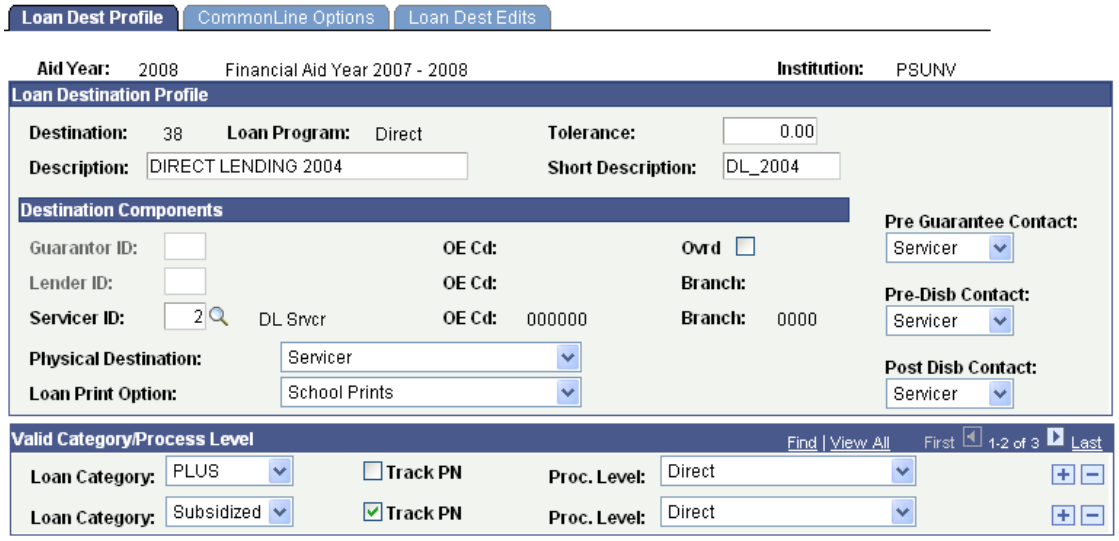
EC Transaction ID	Inbound/Outbound	Data Exchange	File Type Data Definition
DSLFnnOP, where nn is the aid year.	Inbound	Import From COD	School Account Statement (Fixed-Length, Loan Level Loan Detail)
DSDFnnOP, where nn is the aid year.	Inbound	Import from COD	School Account Statement (Fixed-Length, Disbursement Level Loan Detail)

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Setting Up Loan Destination Profiles for Direct Lending

Access the Loan Dest Profile page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Commonline 4**, and then **Create Loan Destinations**, and then **Loan Dest Profile**).

This example illustrates the fields and controls on the Loan Dest Profile (loan destination profile) page. You can find definitions for the fields and controls later on this page.



Loan Destination Profile

Field or Control	Description
Destination	The system assigns and displays a unique numeric identifier when you create a destination.
Loan Program	This should display *Direct* for direct lending.
Tolerance	Enter the tolerance value to determine the amount difference that the system should allow with loans.

Destination Components

Field or Control	Description
Guarantor ID	This field does not apply to direct loans.
Lender ID	This field does not apply to direct loans.
Servicer ID	Select the servicer ID for direct lending. This value is delivered with your system.
OE Cd Branch (Office of Education code branch)	The system displays the OE Cd and Branch for the Servicer ID that you select.

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Field or Control	Description
Physical Destination	Select *Servicer* for direct lending. The physical destination refers to the destination that you intend to receive the loan application.
Loan Print Option	Select the default promissory note print code to report to COD on each individual loan award. Value updates the COD **Promissory Note Print Code** field. Select the appropriate option depending on your institution's arrangement with COD. The **Loan Print Option** can also be overridden on an individual loan application level. COD processing recommends leaving the Loan Print Option blank. If left blank, the 'Promissory Note Print Code' tag is not submitted, and the school's Promissory Note Print Indicator is set to 'Y'. When the Promissory Note Print Indicator is set to 'Y', this indicates to COD that the loan promissory note correspondence is eligible to be sent electronically by COD. See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference,* Electronic Master Promissory Notes and Submitting a Promissory Note Print Code. • *Destination Prints (Sends to Borrower)* – COD prints and sends to borrower on paper format. • *Destination Prints (Returns to School)* – COD prints and sends to school on paper format. • *School Prints* – School prints on-site and provides to borrower. • *Destination Reprints* – COD reprints and sends to borrower on paper format. • *Destination Reprints (Sent to School)* – COD reprints and sends to school on paper format.
Ovrd (override)	Select this check box to save the page without having designated a Guarantor ID, Lender ID, and Servicer ID. But, this does not apply to direct lending, so you can save the page with only the Servicer ID without selecting this check box.

Contact Order

The fields in this group box determine who to contact depending on the stage of the loan.

Field or Control	Description
Pre-Guarantee Contact	Select *Servicer* for direct lending.
Pre-Disb Contact (pre-disbursement contact)	Select *Servicer* for direct lending.
Post Disb Contact (post disbursement contact)	Select *Servicer* for direct lending.

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Valid Category/Process Level

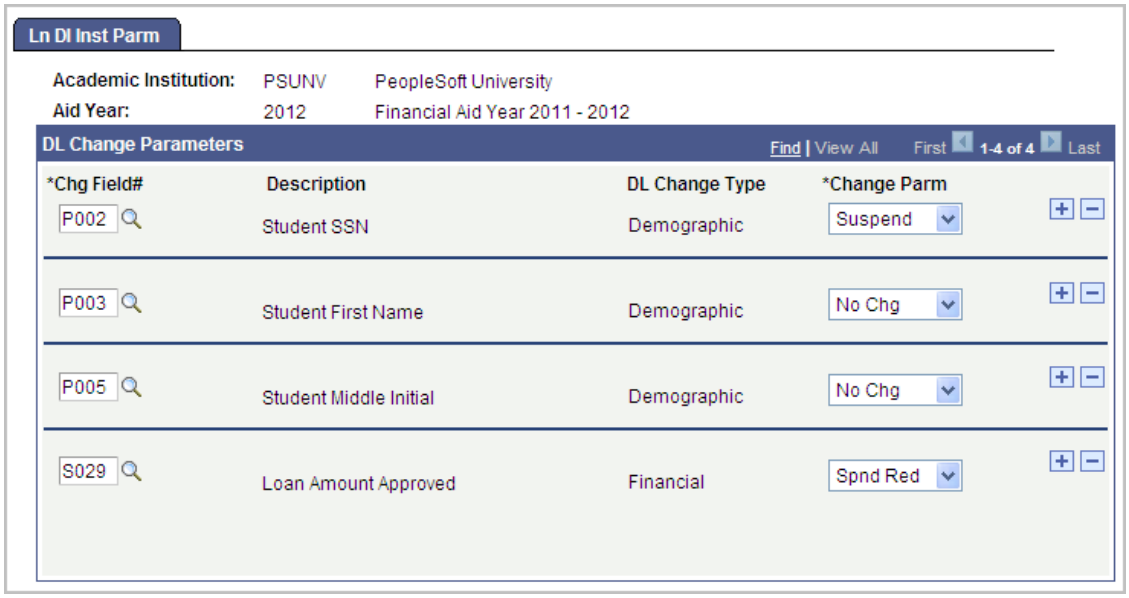
Field or Control	Description
Loan Category	Identify the loan category for the loan destination to process. The loan categories include *PLUS, Sub/Unsub, Subsidized,* and *Unsub.* The category *Sub/Unsub* does not apply to direct lending. Direct lending institutions should use *Subsidized, Unsub,* and *PLUS.* You should add a loan category for all three Direct Lending loan types: subsidized, unsubsidized, and PLUS.
Track PN (track promissory note)	This field does not apply to direct lending.
Proc. Level (process level)	Identify the loan processing level that the loan destination performs for the corresponding loan category. For direct lending, select *Direct* for all of your loan categories.

> **Note**
>
> The other two pages in this component, CommonLine Options and Loan Dest Edits, do not apply to direct lending.

Setting Up Global Direct Lending Change Parameters

Access the Ln Dl Inst Parm page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Direct Loan Change Rules**, and then **Ln Dl Inst Parm**).

This example illustrates the fields and controls on the Ln Dl Inst Parm (loan direct lending institutional parameters) page. You can find definitions for the fields and controls later on this page.



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You can use this setup page to set globally what data changes should be automatically submitted to COD. These data changes can be for a change file, for a record held for institutional review, or for an automatically suspended record because of reductions to financial data. After these global parameters are defined, they are applied to all direct loan records to which changes to data have been made. This global setup assists you in administering what and when multiple data changes should be submitted to COD.

The global setup does not preclude you from holding/suspending change information on a student-by-student level. Individual suspend, change, or hold decisions can be made through the DL Stu Change Hold/Suspense page **(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Hold/Suspend Change Data).**

The system displays the **Academic Institution** and **Aid Year.**

DL Change Parameters

Field or Control	Description
Chg Field # (change field number)	Select the field to change. The change field numbers correspond to those assigned by COD, as defined in the *COD Technical Reference.*
DL Change Type	Indicates whether the specified change field number represents a demographic or financial change.
Change Parm (change parameter)	Select the parameter for each field. *No Chg* (no change). The system does not consider the specified field during change processing. When you make changes to fields to which this change parameter is assigned, the system does not create a change transaction. **Note:** Change rule processing analyzes all change fields by default unless a 'No Chg' value is specified. *Spnd Red* (suspend reduced). This is used for financial change types only. If the change results in a reduced disbursement amount, the system suspends the loan. *Suspend* When you make changes to fields to which this change parameter is assigned, the system creates a change transaction and places the loan on hold. This enables you to review the loan to determine whether the change is appropriate. If the change is fine, you can remove the hold.

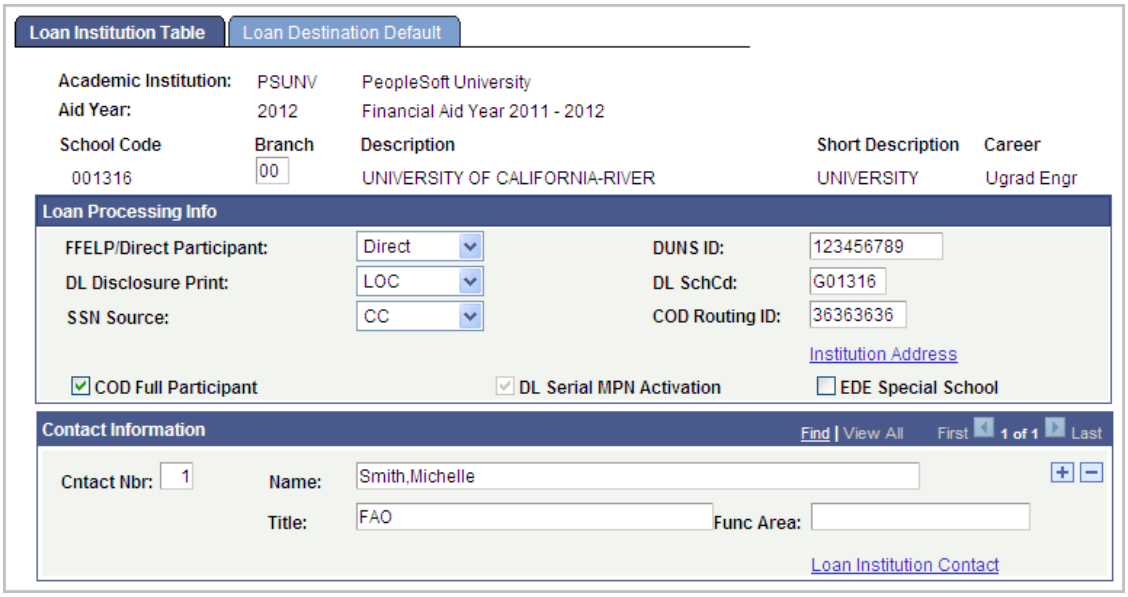
> **Note**
>
> The above change parameters affect those loans that have been transmitted to the COD. Prior to submission, you can change the fields on the loan record without generating a change transaction. Change transactions occur when you make changes to loans that you have previously transmitted to COD.

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Setting Up Loan Institution Table for Direct Lending COD

Access the Loan Institution Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Institution Table**).

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



Loan Institution setup defines loan processing attributes and definitions. A student's awarded loans are matched to a Loan Institution option based on their ISIR Owning School Code, Academic Career, and FFELP/Direct Participant level.

Loan Processing Info

Field or Control	Description
FFELP/Direct Participant	Indicate whether your loan institution can originate *All Loans* (both FFELP and direct lending) *Direct* (Lending only), or *FFELP* (only). Alternative loans are not affected by this setting.
DL Disclosure Print	Indicate where the loan disclosure is printed. Select from *COD, Reprint,* and *School. Reprint* indicates that the Department of Education has authorized the institution to reprint copies of the Direct Loan Disclosure Statement. In most cases, you should select COD.

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Field or Control	Description
SSN Source (social security number source)	Indicate the source for the student's Social Security Number, *CC* (Campus Community) or *ISIR*. **Note:** The COD Direct Loan processes always report the SSN from the student's ISIR, regardless of the SSN Source option selected.
DUNS ID (data universal numbering scheme)	Enter your **DUNS ID.** The Department of Education assigns the DUNS number to the reporting institution.
DL SchCd (direct lending school code)	Enter your school code for direct lending. This field is hidden if your school does not participate in the direct lending program. School code is used to create the loan application ID for COD loan application processing.
COD Routing ID	Enter the Common School ID number that is assigned to your institution by the U.S. Department of Education. This value is used as the COD Routing ID for students associated with the context **School Code, Career, and FFELP/ Direct Participant** level.
COD Full Participant	Select to activate the COD Common ID field.
DL Serial MPN Activation (direct lending serial master promissory note activation)	Displays as "checked" (default value) and is required for Direct Loan processing.
EDE Special School	Select this check box if your institution as been approved as an EDE special school.

Contact Information

In this group box, enter the contact information for each of your financial aid administrators in charge of loan processing.

Field or Control	Description
Cntact Nbr (contact number)	Use this number to prioritize the list of contacts. The person with a contact number of one is considered the primary contact.
Name	Enter the name of the loan officer.
Title	Enter the title of the loan officer.
Func Area (functional area)	Enter information about the functional area that this contact person administrates.

Entering Loan Institution Address Information

Access the Loan Institution Address Information page (click the **Loan Institution Contact** link on the Loan Institution Table page).

This example illustrates the fields and controls on the Loan Institution Address Information page.

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Enter the required address information. Select a **Mailbox Type** of either *Internet* or *Compuserve.* Enter a **Mailbox ID** or email address. The **Mailbox Type** and **Mailbox ID** are used to determine where data files are sent when the files are transmitted using the internet or a private communication network.

> **Note**
>
> You must enter a **Mailbox Type** and **Mailbox ID** to save this page.

Entering Loan Institution Contact Information

Access the Loan Institution Contact Information Loan Institution Contact page (click the **Loan Institution Contact** link on the Loan Institution Table page).

This example illustrates the fields and controls on the Loan Institution Contact Information page.

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Enter the required address information for the individual loan contact. Select a **Mailbox Type** of either *Internet* or *Compuserve.* Enter the **Mailbox ID** or email address.

Setting Up Destination Defaults for Direct Lending

Access the Loan Destination Default page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Loan Institutions**, and then **Loan Destination Default**).

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



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Default Loan Destination Parameters

Field or Control	Description
Loan Program	Select *Direct* for direct lending.
6. Default Destination	Indicates the default loan destination. Select the loan destination number that you created for this processing year for direct lending COD. The loan destination number is created on the Loan Dest Profile page.

> **Note**
>
> The **1. Current Prom Note, 2. Current Year Originations, 3. Student Selected Lender, 4. Check Prior Year Originations,** and **5. Check NSLDS for Guarantor** fields do not apply to direct lending.

Setting Up Attended School Routing ID's

Access the Attended School Routing ID page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Loan Attended Routing ID**).

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



Use this page to associate one or more **COD Attended School Routing ID**'s to a single COD Reporting School Routing ID. Available Reporting School Routing ID values are based on unique COD Routing IDs established on the Loan Institution setup page.

Field or Control	Description
Attending School Routing ID	Enter at least one Attending School Routing ID.

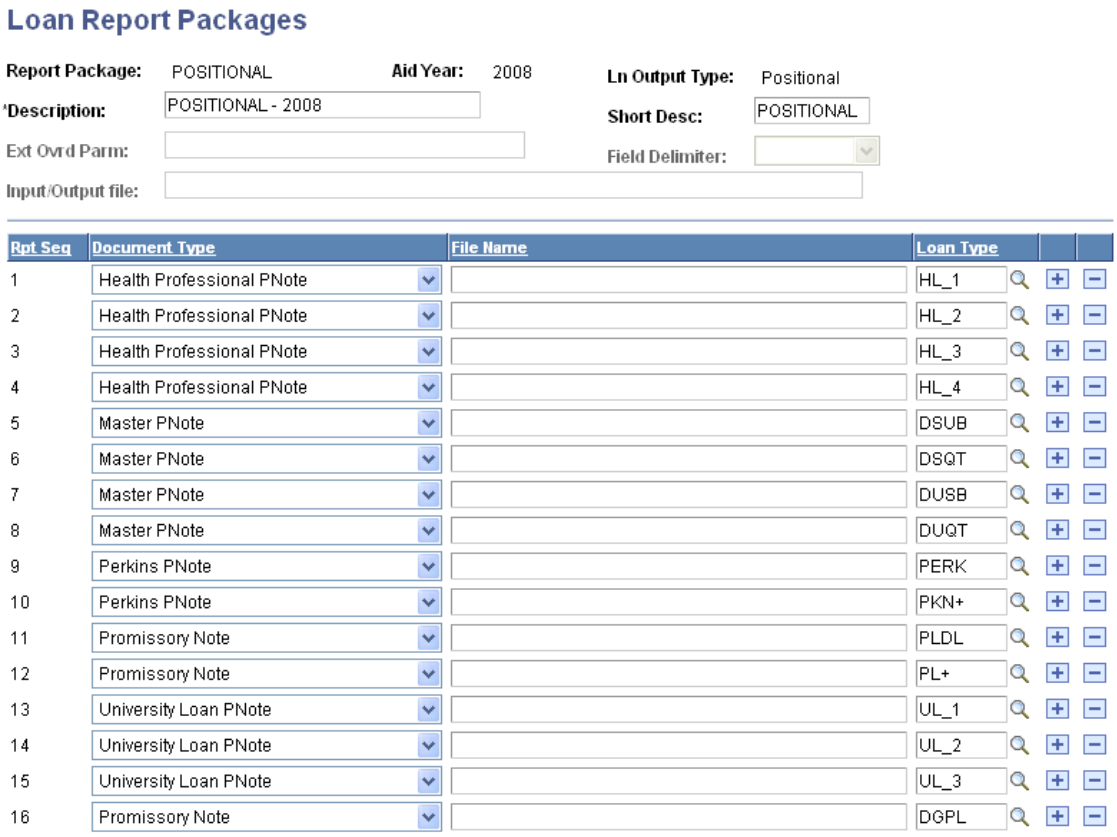
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> **Note**
>
> Attending School Routing IDs must be created for each Aid Year requiring COD processing.

Setting Up Loan Report Packages for Direct Lending

Access the Loan Report Packages page (**Set UP SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Report Packages**, and then **Loan Report Packages**).

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



Loan Report Packages

Report Package:	POSITIONAL	**Aid Year:**	2008	**Ln Output Type:**	Positional
***Description:**	POSITIONAL - 2008			**Short Desc:**	POSITIONAL
Ext Ovrd Parm:				Field Delimiter:	
Input/Output file:					

Rpt Seq	Document Type	File Name	Loan Type
1	Health Professional PNote		HL_1
2	Health Professional PNote		HL_2
3	Health Professional PNote		HL_3
4	Health Professional PNote		HL_4
5	Master PNote		DSUB
6	Master PNote		DSQT
7	Master PNote		DUSB
8	Master PNote		DUQT
9	Perkins PNote		PERK
10	Perkins PNote		PKN+
11	Promissory Note		PLDL
12	Promissory Note		PL+
13	University Loan PNote		UL_1
14	University Loan PNote		UL_2
15	University Loan PNote		UL_3
16	Promissory Note		DGPL

The Loan Report Packages page associates pre-defined promissory document types to Direct Loan types. You can print Federal Direct Subsidized and Unsubsidized Stafford and PLUS MPNs on preprinted forms approved by the Department of Education, using the positional print option. When the Office of Management and Budget (OMB) revises approved formats, Oracle delivers updated code to all schools.

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> **Note**
>
> Direct PLUS Loan (this includes DL Graduate PLUS loans) master promissory notes print based on positional format with data labels.
>
> Direct Subsidized and Direct Unsubsidized Stafford Loan master promissory notes print based on positional format without data labels.

The system displays the **Report Package, Aid Year,** and **Ln Output Type** (loan output type) based on your selection when accessing the page.

Field or Control	Description
Ext Ovrd Parm (external override parameter)	If you are using an external product, you can enter values in this field using the guidelines set by the external product. This field appends parameters to the JOB line in the external product extract file. Review your external product user's guide. Leave this field blank if you do not use an external product.
Field Delimiter	This field is not used for promissory note processing.
Input/Output file	If you are using an external product, you must enter a file name to export the report package. This specifies where the output goes when you run the print process. Leave this field blank if do not use an external product.
Rpt Seq (report sequence)	This designates the order in which the system creates the output for each loan document.
Document Type	These are delivered with your system. You must insert a new row for each loan document type to be included in the package: *Master PNote:* Stafford MPN document type. Associate Stafford Subsidized and Unsubsidized loan type values with *Master PNote.* *Promissory Note:* PLUS MPN document type. Associate PLUS and Graduate PLUS loan type values with *Promissory Note.*
File Name	If you are using an external product, you must enter the file name of the external product form to associate with the document type. For example, if the document type is Master Pnote, enter MPN0400_E. For document type Perkins Pnote, enter PERKNS_E. Leave this field blank if you do not use an external product.

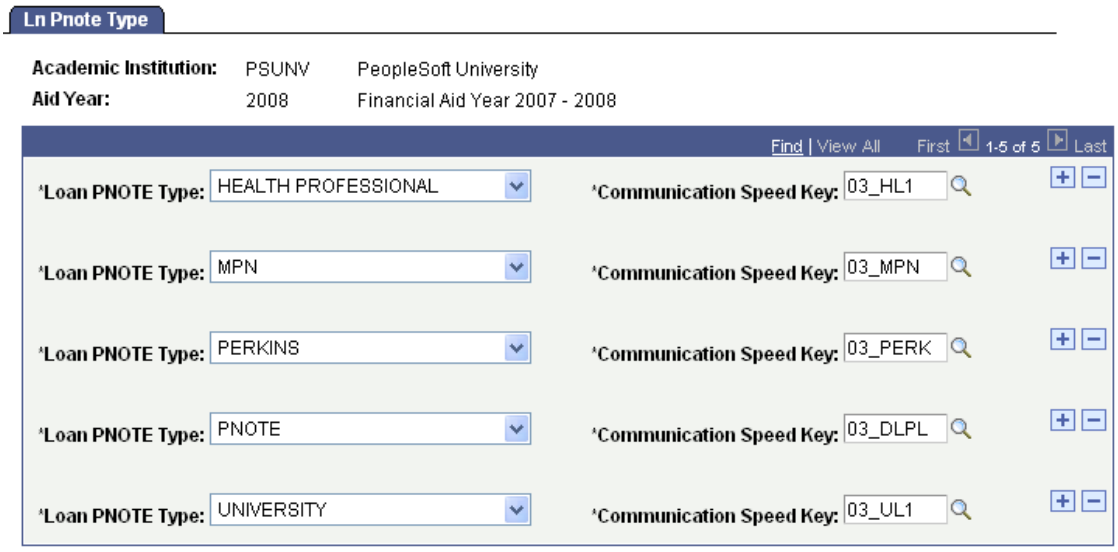
Field or Control	Description
Loan Type	Enter the loan types associated with the *Master PNote* or *Promissory Note.*

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Setting Up DL Serial Promissory Note Table

Access the Ln Pnote Type page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Define Serial Promissory Notes**, and then **Ln Pnote Type**).

This example illustrates the fields and controls on the Ln Pnote Type (loan promissory note type) page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Loan PNOTE Type (loan promissory note type)	Enter a type for *MPN*, the Stafford MPN document type. Associate Stafford Subsidized and Unsubsidized loan type values with *MPN*. Insert a row to add *PNOTE*, the PLUS MPN document type. Associate PLUS and Graduate PLUS loan type values with *PNOTE*. You might also need to add health, Perkins, and university/institutional loans to this setup page.
Communication Speed Key	On each row, enter the Communication Key to be associated with the loan PNOTE type.

Setting Up Loan Servicer Table for Direct Lending

Access the Loan Servicer Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine4**, and then **Define School Servicers**, and then **Loan Servicer Table**).

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

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Field or Control	Description
Servicer ID	This number identifies the servicer associated with the requested loan.
OE Cd (Office of Education code)	When you select a value, the system uses data from the Servicer Load Maintenance database and automatically populates the rest of the information.
Proc Lead Time (process lead time)	Indicates the number of days a loan destination needs to freeze its data to prepare for a transfer to the school. For example, if the lead-time is 5 days, changes can only be made to the student's loan 5 days prior to the first disbursement.
DUNS ID (data universal numbering scheme ID)	The system displays this field if your institution is required to report a DUNS ID in the processing of loans. You can also enter your DUNS ID. The Department of Education assigns the DUNS number to the reporting institution.

Address Information

Enter the address of the loan servicer in the fields in this group box.

Click the **Electronic Address** link to access the Servicer Electronic Address page, where you can enter an email address for this loan servicer.

Contact Information

Enter the name and title of individual contacts at the loan servicer. You can enter multiple contacts by inserting rows. The **Cntact Nbr** (contact number) field is used to prioritize the order of your contacts.

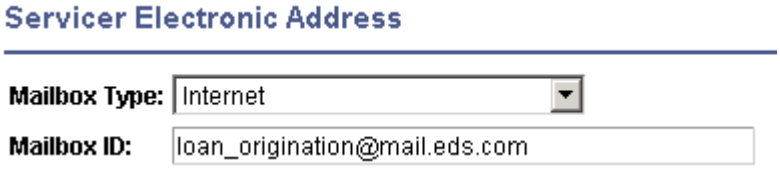
Click the **Contact Address** link to access the Servicer Contact Information page, where you can enter the address and email information for an individual contact at the loan servicer.

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Entering Servicer Electronic Addresses

Access the Servicer Electronic Address page (click the **Electronic Address** link on the Loan Servicer Table page).

This example illustrates the fields and controls on the Servicer Electronic Address page. You can find definitions for the fields and controls later on this page.

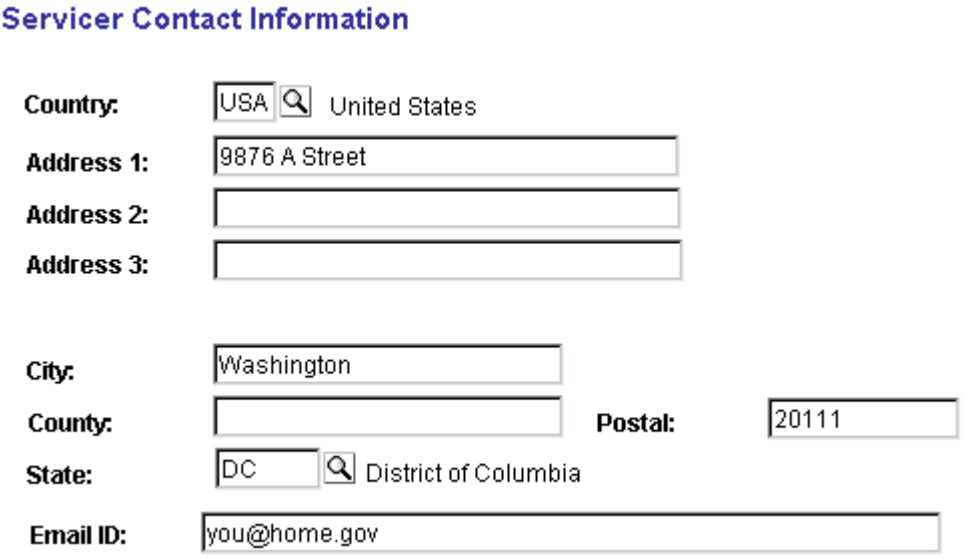


Field or Control	Description
Mailbox Type	Select the servicer's mailbox type of *None, Internet,* or *Compuserve.*
Mailbox ID	Enter the servicer's mailbox identification or address to which data files are sent when the files are transmitted using the internet or a private communication network.

Entering Servicer Contact Information

Access the Servicer Contact Information page (click the **Contact Address** link on the Loan Servicer Table page).

This example illustrates the fields and controls on the Servicer Contact Information page.



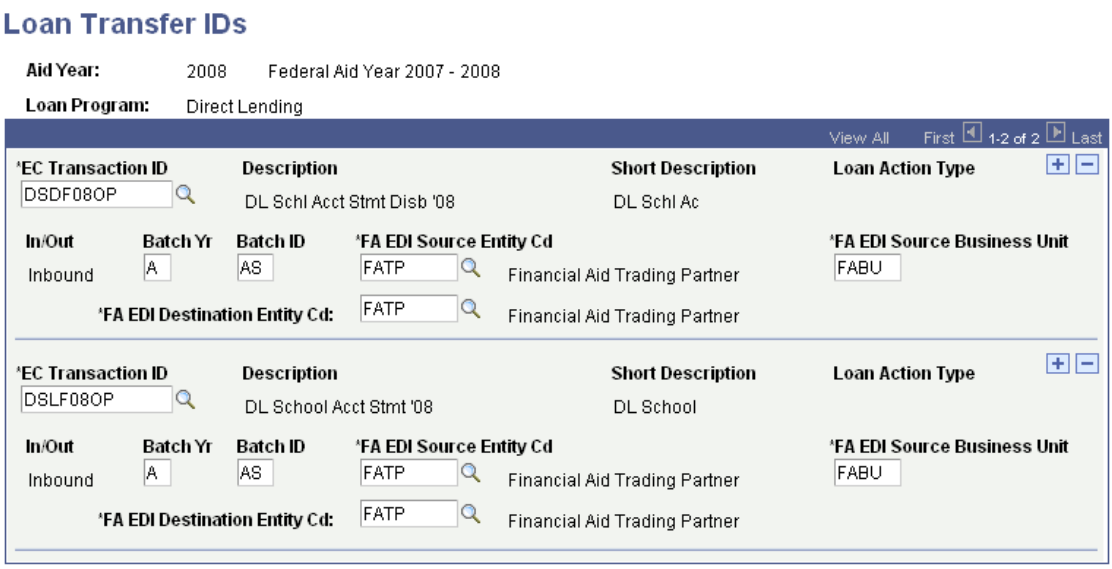
Enter the address and email information in the fields provided.

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Setting Up Loan Transfer IDs for Direct Lending

Access the Loan Transfer IDs page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Transfer ID**, and then **Loan Transfer IDs**).

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



Verify that the Loan Transfer IDs are set for the current aid year. Use the Loan Transfer ID Table page to set up loan transfer IDs and descriptions. This is a system definition table used for COD data file processing. EC Transaction ID correlates to Common Origination Message Classes used by Full Participants for sending and receiving data from the COD system for each processing year.

Oracle supports the following message classes for your Direct Lending process:

- DSDFnnOP School Account Statement Disbursements (Fixed Length).
- DSLFnnOP School Account Statement Loan Level (Fixed Length).

Field or Control	Description
EC Transaction ID (electronic commerce transaction ID)	Select a value. When you tab to the next field, the system displays the Description and Short Desc (descriptions) for the EC Transaction ID. The EC Transaction ID is based on the Message Classes used for Direct Lending.
Loan Action Type	This field does not apply to direct lending.
In/Out	The system indicates whether the file is *Inbound* or *Outbound.*
Batch Yr (batch year)	Enter the last digit of the appropriate aid year. For example, enter *8* for 2008.

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Field or Control	Description
Batch ID	Indicates the unique ID for the batch. It is used when transferring data to the loan destination.
FA EDI Source Entity Cd (Financial Aid EDI source entity code)	Select the appropriate value for your institution. For most institutions, you select *FATP*.
FA EDI Source Business Unit	The system populates this field after an FA EDI Source Entity Cd is selected. The default value should be *FABU*. This allows the EDI Manager to retrieve and generate the appropriate file structure.
FA EDI Destination Entity Cd (Financial Aid EDI destination entity code)	You must update your system annually. You should continue to review and update your setup pages for current year processing.

> **Note**
>
> You must update your system annually. You should continue to review and update your setup pages for current year processing.

Valid Loan Transfer IDs

This table lists Direct Lending Loan Transfer ID information current for this publication. Ensure that these transaction IDs are in your system if you plan to use direct lending.

EC Transactions ID	In/Out	File Type Data Definition	Batch Year	Batch ID	FA EDI Entity Source Code and EDI Destination Source Code	FA Entity Source Business Unit
DSDFnnOP	In	Import COD Statement of Account Summary file-Disbursement Level	Last digit of aid year. For example, Batch Year value of 9 represents 2008-2009 aid year.	AS	FATP	FABU
DSLFnnOP	In	Import COD Statement of Account Summary file-Loan Level	n	AS	FATP	FABU

Setting Up Loan Types for Direct Lending

You set up loan types, such as a direct lending subsidized type, to group processing information together and then associate certain item types to the loan type. This information is

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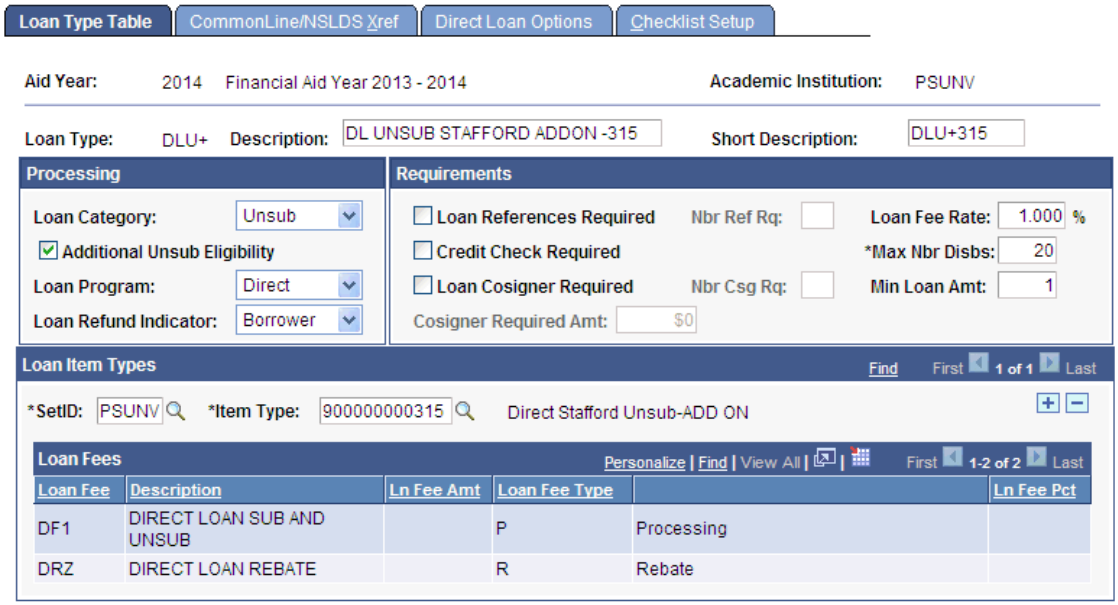
kept in the Loan Type Table, which is accessed from the Loan Type Table component. You can associate certain loan item types with the information you enter in the Loan Type Table.

Three of the four pages in this component are used for Direct Lending. The fourth page, the CommonLine NSLDS Xref page, is not shown here.

Entering the Loan Type

Access the Loan Type Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Loan Type Table**).

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



The Loan Type setup allows you to provide further loan processing attributes to a Financial Aid Item Type defined as a loan.

Any Item Type defined as a loan must have a corresponding Loan Type if you want to use the Campus Solutions Loan Processing module.

Below are the specific attributes required to process your Direct Loan financial aid item types.

Processing

Field or Control	Description
Loan Category	Select *Subsidized, Unsubsidized, or PLUS* depending on the type of loan that you are defining. Do not select any option except one of these for direct lending. If you select *PLUS,* a **Graduate PLUS Indicator** check box appears. Select the check box for Grad PLUS loans.

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Field or Control	Description
Additional Unsub Eligibility	Select if loan type is used to identify an additional unsubsidized Stafford loan Financial Aid Item Type awarded specifically for a dependent student with a PLUS Loan denied. **Note:** Creating a unique Unsubsidized Stafford Direct Loan Financial Aid Item Type allows awarding and COD loan processing to specifically identify the loan awards as a loan based on PLUS Denied assessment. The loan detail gets communicated and reported to the NSLDS system, resulting in the loan displaying the Additional Unsubsidized Code (P-PLUS loan denial).
Loan Program	Select the *Direct* option for direct lending. For example, to set up a Subsidized Stafford loan processed through direct lending, the Loan Category is *Subsidized* and the Loan Program is *Direct*.
Loan Refund Indicator	Select one of the following. *Borrower:* The borrower of the loan receives any refunds from the loan. For example, the borrower could be a parent or guardian for a PLUS loan. *Student:* The student receives any refunds from the loan, whether they are the borrower or not. You can override the loan refund indicator at the loan application level.

Requirements

Select the appropriate options for the loan by selecting the check boxes. Only those check boxes used for direct lending are explained.

> **Note**
>
> The **Loan References Required, Nbr Ref Rq** (number of references required), **Loan Cosigner Required, Nbr Csg Rq** (number of cosigners required), and **Cosigner Required Amount** fields are used for CommonLine loans only and are not relevant for direct lending.

Field or Control	Description
Credit Check Required	Select if a credit check is required for the type of loan. If selected, direct loan disbursements to the students and transmissions to COD do not occur until the credit check is accepted. Select this check box for PLUS loans.

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Field or Control	Description
Loan Fee Rate	Enter the rate to print on the promissory note for this type of loan and transmitted on the loan origination record. Ensure that the loan fee rate matches the loan fee setup for the financial aid item type you associate with this loan type.
Max Nbr Disbs (maximum number of disbursements)	Enter the maximum number of disbursements that are allowed per loan. The recommended values are *20* for Stafford loans and *4* for PLUS loans.
Min Loan Amt (minimum loan amount)	Enter the minimum loan amount that your institution allows. The value should not be less than the COD minimum.

Loan Item Types

Field or Control	Description
SetID	The set ID that you select determines the item types that are available for you to select.
Item Type	The selection available depends on the set ID that you entered. For direct lending you cannot have multiple financial aid item types associated with the same loan type. You must create a separate loan type for each direct lending item type to process. You cannot share financial aid item types across multiple loan types. If you try to use the same item type with a new or another loan type setup, you receive an error message.

The following field values are associated with the item type that you select.

Field or Control	Description
Loan Fee	Displays the type of loan fee associated with the item type selected. When you insert a row, you can use the inner scroll bar to view the new rebate loan fee percentage.
Ln Fee Amt (loan fee amount)	Displays the dollar amount of the loan fee for the item type selected.
Loan Fee Type	Displays the loan fee type associated with the financial aid item type. For direct lending you should have a row for rebate and a row for loan fees.
Ln Fee Pct (loan fee percentage)	Displays the loan fee percentage charged for the item type selected. These values are from your item type setup. The system also displays the interest rebate provided on the item type setup. **Note:** DL-COD reporting reports the Direct Loan Interest Rebate Percentage based on the associated Loan Type setup.

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Entering Direct Lending Loan Options

Access the Direct Loan Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Direct Loan Options**).

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



The system displays the **Aid Year, Academic Institution, Loan Type, Loan Program,** and **Loan Ctgry** (loan category).

Direct Loan Options

This group box allows you to specify the conditions for disbursing funds to the students and sending disbursement files to the direct lending Loan Origination Center.

Field or Control	Description
Use Direct Loan Version	Displays the direct lending version you are using.
Days to Add to Inserted Disb (disbursement)	This is used for Stafford loans only. When entering an additional disbursement, the system adds the value specified in this field to the current date. This date becomes the anticipated disbursement date on the Origination Change Record for the added disbursement. Use this field to add days to the anticipated disbursement date so the money is actually disbursed later than the anticipated disbursement date. For example, you can take a loan that is being processed today and use this field to add days to the anticipated disbursement date that is placed on the Loan Origination record. This makes the date reported to the COD later than the disbursement date. This field is not commonly used because generally institutions disburse sooner, not later.

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Field or Control	Description
DL Disbursement Option	Select when the system allows loans to be disbursed to the student's accounts. *Orig Ack:* Disburses loans after you receive the Origination Acknowledgment. *Orig:* Disburses loans after you originate the loan. *Orig+PNote:* Disburses loans after you receive the origination and promissory note acknowledgments. *PNote Ack:* Disburses loans after you receive the promissory note acknowledgment.
DL Transmit Disb Optn (direct lending transmit disbursement option)	Select when the system should allow transmission of disbursement files to COD. *Orig Ack:* Transmits direct lending disbursements after you receive the origination acknowledgment. *Orig+PNote:* Transmits direct lending disbursements after you receive the origination acknowledgment and COD accepts the promissory note.

> **Note**
>
> If the **Credit Check Required** check box is selected on the Loan Type Table page, direct loan disbursements to students and transmissions to the COD do not occur until the credit check is accepted. Therefore, the values entered in the **DL Disbursement Option** and **DL Transmit Disb Option** fields are subject to the **Credit Check Required** check box value.

> **Warning**
>
> Changes to either of the **DL Disbursement Option** or **DL Transmit Disb Option** parameter settings do not affect loans already originated if the parameter settings are changed after the loans have been originated. Changes to these settings only affect loans originated at the time of the setting. If you have loans originated in error, please contact the Global Support Center.

Selecting DL Disbursement Option Values

Use this table to help determine when you can disburse loans to Student Financials, depending on the field value selected in the DL Disbursement Option field on the Direct Loan Options page.

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Process Completed	Direct loan Disbursement Option field on Direct Loan Options page	Authorize and Disburse?	If NO disbursement, what is step before I can disburse the Direct Loan?
Originate Loan	*Orig*	YES	If loan is DLPLUS (parent or graduate and professional) check to ensure record reflects an approved credit check. If loan is DL Stafford, check authorization error message for more information.
Originate Loan	*Orig Ack*	NO	Outbound the Originations file then wait for the Origination Acknowledgment file and import the file.
Originate Loan	*Orig + PNote*	NO	Outbound the Originations file. Wait for the Origination Acknowledgment file and import the file. The loan application must be updated with an approved accepted promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.
Originate Loan	*PNote Ack*	NO	The loan application must be updated with an approved accepted promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.

Selecting Direct Loan Transmit Disbursement Option Values

Use this table to help determine when you can send the disbursement file to the COD, depending on the field value selected in the DL Transmit Disb Option field on the Direct Loan Options page.

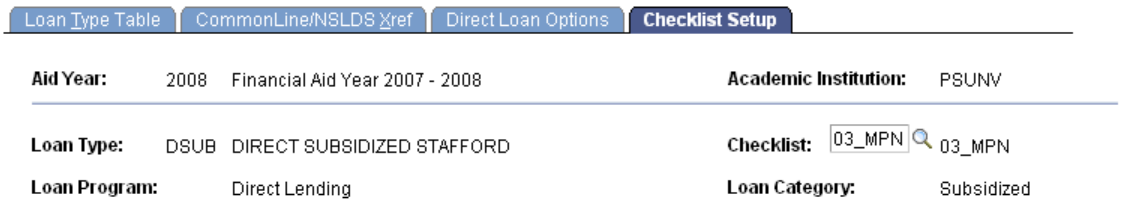
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Direct Loan Transmit Disbursement Option field on Direct Loan Options page	OK to Process Disbursement Transmission Out?	If NO, what is next step before I can transmit the Direct Loan disbursement record?
Orig Ack	Yes, if Origination Acknowledgement has been imported and Loan Origination is accepted.	If Loan Origination Acknowledgement has *not* been imported, wait for the Loan Origination Acknowledgement file, load and import the file.
Orig + PNote	Yes, if Origination Acknowledgement has been imported and Loan Origination is accepted. The loan application must be updated with an approved promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.	If a Loan Origination Acknowledgement file has *not* been imported, wait for the Loan Origination Acknowledgement file, then load and import the file. The loan application must be updated with an approved promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.

Entering Checklists for the Loan Type

Access the Checklist Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Create Loan Types**, and then **Checklist Setup**).

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



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Field or Control	Description
Checklist	Select a **Checklist** item to associate with the loan type. You define the checklist items available. The primary use of attaching a checklist requirement is to prevent disbursement of loan funds until the required documents on the checklist are completed. You can also use it to send reminders and for statistical reporting. Some examples of possible checklist items are *Direct Loan Promissory Note, Direct PLUS Prom Note, FFELP Promissory Note, FFELP PLUS Promissory Note, Perkins Promissory Note, Health Professional Note,* and an *Institutional/ University Note.*

Setting Up 150 Percent Direct Subsidized Loan Limit (SULA)

> **Note**
>
> While the official name of this federal statutory requirement is "150 Percent Direct Subsidized Loan Limit", for ease of reference in the system, the acronym "SULA" is used. It is understood that COD defines SULA as "Subsidized Usage Limit Applies" (a flag indicating whether or not a person is subject to a subsidy limit for a Direct Subsidized Loan); however, “SULA” is being used for most things related to "150 Percent Direct Subsidized Loan Limit".

In order to monitor Direct Lending Subsidized loan limits, schools are required to report Program Classification of Instructional Program (CIP) code, Published Program Length, Program Period Start Date, Weeks Program Academic Year, Enrollment Status, Program Credential Level, and Special Programs Indicator (Non-Credential Teacher Certification Program or Preparatory Coursework) to COD.

> **Note**
>
> A database view, SFA_ACADPLTBLVW, is available to use for equations and queries to manage those student who are nearing their 150% maximum. This view uses the Academic Plan View table (ACAD_PLAN_TB_VW) as its base, but also includes SULA-related fields.

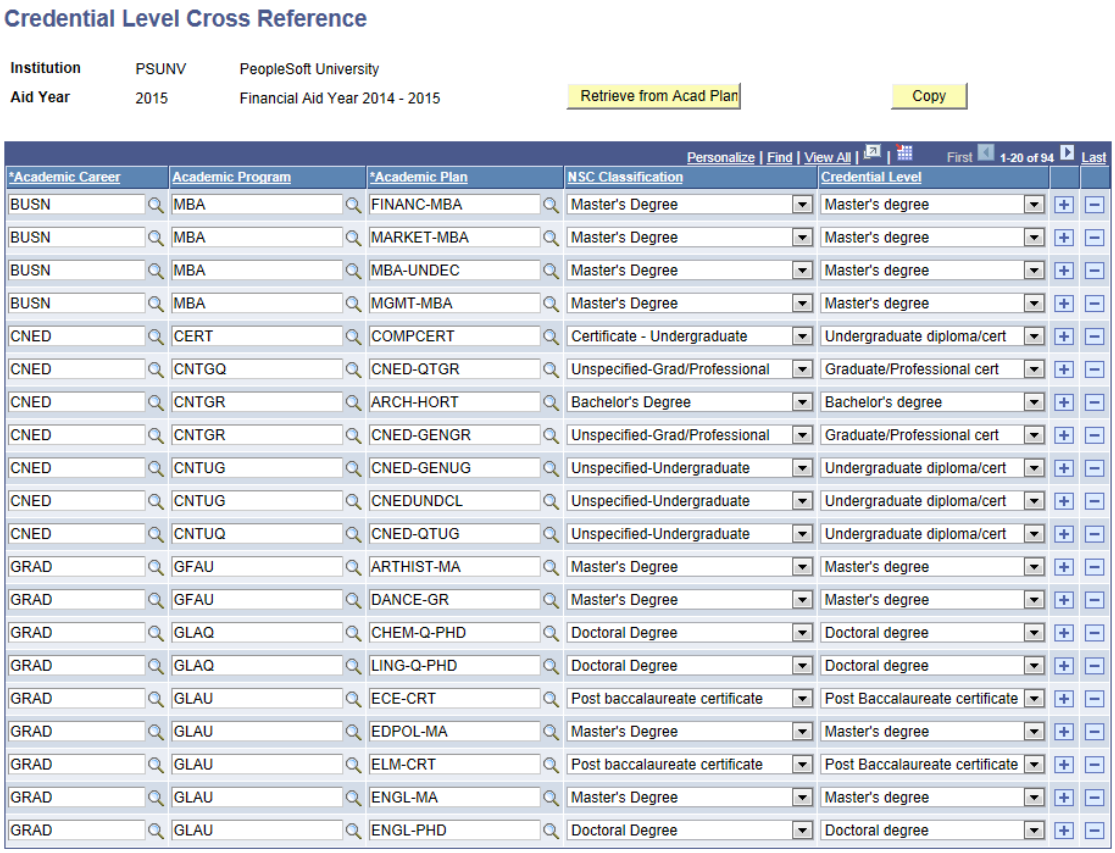
Setting Up Credential Level Cross References

Use the Credential Level Cross Reference page to map academic career/academic program/ academic plan/National Student Clearinghouse (NSC) Classifications combinations to COD Credential Levels.

Access the Direct Loan Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **SULA**, and then **Credential Cross Reference**).

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



Credential Level Cross Reference

Institution PSUNV PeopleSoft University
Aid Year 2015 Financial Aid Year 2014 - 2015 Retrieve from Acad Plan Copy

Personalize | Find | View All | First 1-20 of 94 Last

*Academic Career	Academic Program	*Academic Plan	NSC Classification	Credential Level
BUSN	MBA	FINANC-MBA	Master's Degree	Master's degree
BUSN	MBA	MARKET-MBA	Master's Degree	Master's degree
BUSN	MBA	MBA-UNDEC	Master's Degree	Master's degree
BUSN	MBA	MGMT-MBA	Master's Degree	Master's degree
CNED	CERT	COMPCERT	Certificate - Undergraduate	Undergraduate diploma/cert
CNED	CNTGQ	CNED-QTGR	Unspecified-Grad/Professional	Graduate/Professional cert
CNED	CNTGR	ARCH-HORT	Bachelor's Degree	Bachelor's degree
CNED	CNTGR	CNED-GENGR	Unspecified-Grad/Professional	Graduate/Professional cert
CNED	CNTUG	CNED-GENUG	Unspecified-Undergraduate	Undergraduate diploma/cert
CNED	CNTUG	CNEDUNDCL	Unspecified-Undergraduate	Undergraduate diploma/cert
CNED	CNTUQ	CNED-QTUG	Unspecified-Undergraduate	Undergraduate diploma/cert
GRAD	GFAU	ARTHIST-MA	Master's Degree	Master's degree
GRAD	GFAU	DANCE-GR	Master's Degree	Master's degree
GRAD	GLAQ	CHEM-Q-PHD	Doctoral Degree	Doctoral degree
GRAD	GLAQ	LING-Q-PHD	Doctoral Degree	Doctoral degree
GRAD	GLAU	ECE-CRT	Post baccalaureate certificate	Post Baccalaureate certificate
GRAD	GLAU	EDPOL-MA	Master's Degree	Master's degree
GRAD	GLAU	ELM-CRT	Post baccalaureate certificate	Post Baccalaureate certificate
GRAD	GLAU	ENGL-MA	Master's Degree	Master's degree
GRAD	GLAU	ENGL-PHD	Doctoral Degree	Doctoral degree

> **Note**
>
> This table should reflect every Academic Career/Academic Program/Academic Plan combination that exists on Student FA Term. If a combination exists on Student FA Term that is not reflected on this table, the student's DL loan fails Validation.

COD Credential Level values are mapped to Academic Plan NSC Classification values as follows for purposes of populating the table when you click on the **Retrieve from Acad Plan** button:

NSC Classification	COD Credential Level
Associate's Degree	Associate's degree
Bachelor's Degree	Bachelor's degree
Certificate – Undergraduate	Undergraduate diploma/cert
Doctoral Degree	Doctoral degree
Master's Degree	Master's degree
Post baccalaureate certificate	Post Baccalaureate certificate
Postdoctorate	First Professional degree
Professional	First Professional degree

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NSC Classification	COD Credential Level
Unspecified-Grad/Professional	Graduate/Professional cert
Unspecified-Undergraduate	Undergraduate diploma/cert
	Non-credential programs

Field or Control	Description
Retrieve from Acad Plan (retrieve from academic plan)	Click this button to automatically populate the Career, Academic Program, Academic Plan, and NSC Classification from the Academic Plan table instead of having to manually populate the table. Please note that even though you may click this button to auto-populate the table, you can still override the values here so that they can be different than what's contained on the Academic Plan table.
NSC Classification (National Student Clearinghouse classification)	Select a NSC Classification value to associate with the Academic Career and Academic Plan. Valid values include: • Associate's Degree • Bachelor's Degree • Certificate – Undergraduate • Doctoral Degree • Master's Degree • Post baccalaureate certificate • Post doctorate • Professional • Unspecified-Grad/Professional • Unspecified-Undergraduate
Credential Level	Select a corresponding COD Credential Level to associate with the selected NSC Classification. Valid values include: • Associate degree • Bachelor's degree • Doctoral degree • First Professional degree • Graduate/professional certif • Master's degree • Non-credential programs (preparatory coursework/teacher certification) • Post Baccalaureate certificate • Undergrad diploma/cert **Note:** The system assigns the credential level based only on the matching Academic Career/ Academic Program/Academic Plan combination from the student's FA Term record. If no matching Career/Program/Plan combination is found, a "No SULA Data found" message is logged in the COD Outbound Message Log. If there is a matching Career/Program/Plan combination found, but there is no Credential Level specified on the setup table, a DLOVL055 - Credential level missing error is given.

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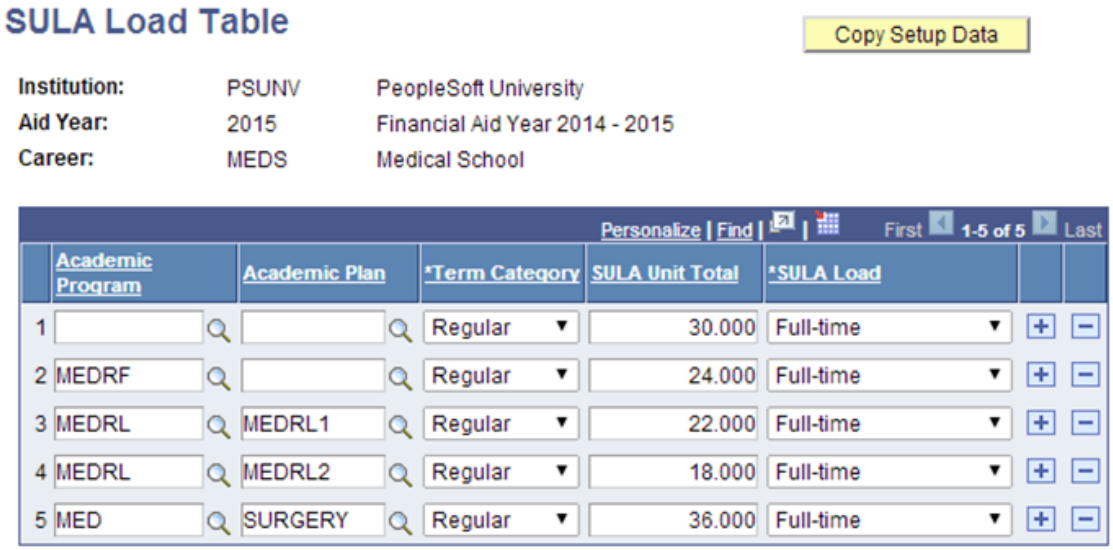
See also Campus Solutions Application Fundamentals: Defining Academic Plans.

Setting Up SULA Load Rules

Use the SULA Load Rules page to define COD Enrollment Status (SULA) loads for reporting purposes to COD.

Access the Direct Loan Options page (**(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **COD**, and then **SULA**, and then **SULA Load Rules**).

This example illustrates the fields and controls on the subsidized usage limit applies Load Table page. You can find definitions for the fields and controls later on this page.



This is setup determines the SULA Load value in the Financial Aid Term record and what is reported to COD.

The following hierarchical evaluation is used in the SULA Load assignment when using **Academic Plan** and **Academic Program** (assigned from most to least restrictive match):

- Academic Program and Academic Plan match (both are non-blank).
- Academic Program match (Academic Program non-blank, Academic Plan blank).
- Career match (Academic Program and Academic Plan are blank).

Field or Control	Description
Term Category	Select the term category for the default term enrollment limits of the academic program.
SULA Unit Total (Subsidized Usage Limit Applies unit total)	Enter the SULA unit total threshold for each term category. The SULA unit total represents the summed number of Anticipated plus Current plus Remote units for the given **SULA Load**.

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Field or Control	Description
SULA Load (Subsidized Usage Limit Applies load)	Select the **SULA Load** value. Values for this field are delivered with your system as translate values. **Note:** While you are permitted to establish a Less than Half-time value here, COD rejects Direct Lending loans that have an Enrollment Status that is Less than Half-time

> **Note**
>
> For COD Originations, all SULA Load values are reported to COD as "Full-time" for all loans unless there is a **SULA Load** override value entered for the student.
>
> For COD Disbursements, either the student's actual SULA Load or the **SULA Load** override is reported to COD.
>
> For information on how to override SULA Load Values, see Processing and Reviewing Financial Data.

Viewing System Administration Information

The following tables are view only and can be used by your System Administrator. The fields are defined by field layout and valid values required by the *COD Technical Reference.* This section discusses how to:

- View loan action codes.
- View Direct Lending change fields.

Pages Used to View System Administration Information

Page Name	Definition Name	Navigation	Usage
Loan Action Code	LOAN_ACTNCD_WK00	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Action Codes**, and then **Loan Action Code Table**	View loan action codes and messages and their descriptions.

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Page Name	Definition Name	Navigation	Usage
DL Change Fields	DL_CHG_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **View Direct Loan Change Fields**, and then **DL Change Fields**	View loan action codes and descriptions related to Change Origination processing. This is a system definition table used for Direct Lending File processing. The Hold/Suspense options, for students and globally, come from this table.

Viewing Loan Action Codes

Use the Loan Action Code Table page to view loan action codes and messages and their descriptions. This is a system definition table used for file processing.

Access the Loan Action Code Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Maintain Loan Action Codes**, and then **Loan Action Code Table**).

This example illustrates the fields and controls on the Loan Action Code Table page.

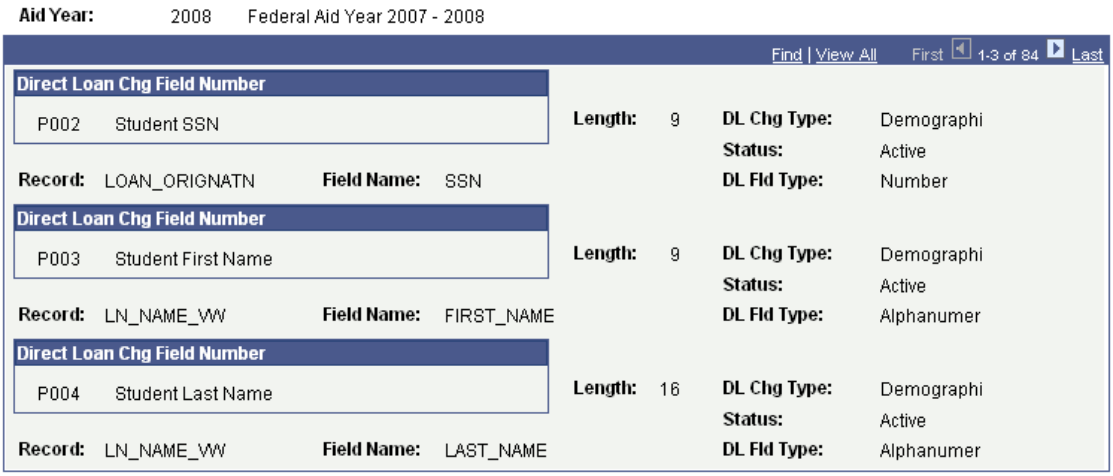


Viewing Direct Lending Change Fields

Access the DL Change Field Cross Reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **View Direct Loan Change Fields**, and then **DL Change Fields**).

This example illustrates the fields and controls on the DL Change Fields page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Direct Loan Chg Field Number (direct loan change field number)	Displays field numbers defined by *COD Technical Reference.*
Length	Displays the number of characters allowed for the field.
DL Chg Type (direct lending change type)	Displays the type of change this field represents. Values are *Demographic, Financial,* and *Eligibility.*
Status	Indicates the status of the field in your system.
DL Fld Type (direct lending field type)	The field type can be *Number* or *Alphanumeric.*
Record	The record/table name for this field in the system.
Field Name	Displays the name of the change field.

The change fields are used on two pages:

- Direct Loan Orig Actions (LN_DL_ORIG_INQ) page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions).
- DL Student Change Information (LN_DL_EMPL_PARM) page (Financial Aid, Loans, Direct Lending Management, Hold/Suspend Change Data).

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13

Setting Up for Pell Payment Processing

Common Elements Used in Pell Payment Processing

Field or Control	Description
Aid Year	An awarding cycle with defined disbursement periods.
Pell ID Reporting	Identification code assigned to an institution by the Department of Education and used during the exchange of electronic data.
TG Number	A number that corresponds to an institution's Student Aid Internet Gateway (SAIG) mailbox.
OPE ID Number (office of post secondary education identification number)	Identification number assigned by the Department of Education to the reporting institution.
Low T & F Flag (low tuition and fees flag)	The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category as mandated by the Department of Education for each award year.

Setting Up Pell Funding Method

This section provides an overview of the Pell funding method and discusses how to define the Pell funding method.

Understanding Pell Funding Method

As part of the Pell payment process setup, institutions must indicate if they are an advanced funding institution or just-in-time funding institution. Under the just-in-time payment method, an accepted disbursement record becomes both a report of a disbursement for a student and a request for funds.

Defining Pell Funding Method

Access the Financial Aid Defaults page (**Set Up SACR**, and then **Install**, and then **Financial Aid Installation**, and then **Financial Aid Defaults**).

Find a complete description of the Financial Aid Defaults page in Setting Up Your Financial Aid Awarding Cycle, Establishing Defaults, Defining Installation Level Defaults.

Select the **Pell Just In Time Institution** check box in the **Activation Indicators** group box to indicate that you participate in the just-in-time funding method.

Clear the **Pell Just in Time Institution** check box to indicate that you participate in the advance funding method.

See Defining Installation Level Defaults.

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Setting Up Pell Payment Information

To set up Pell payment information, use the Pell payment component (PELL_SETUP_PNL).

This section discusses how to:

- Define Pell payment setup.
- Copy Pell payment options.
- Change Pell payment default information.

Pages Used to Define Pell Payment Information

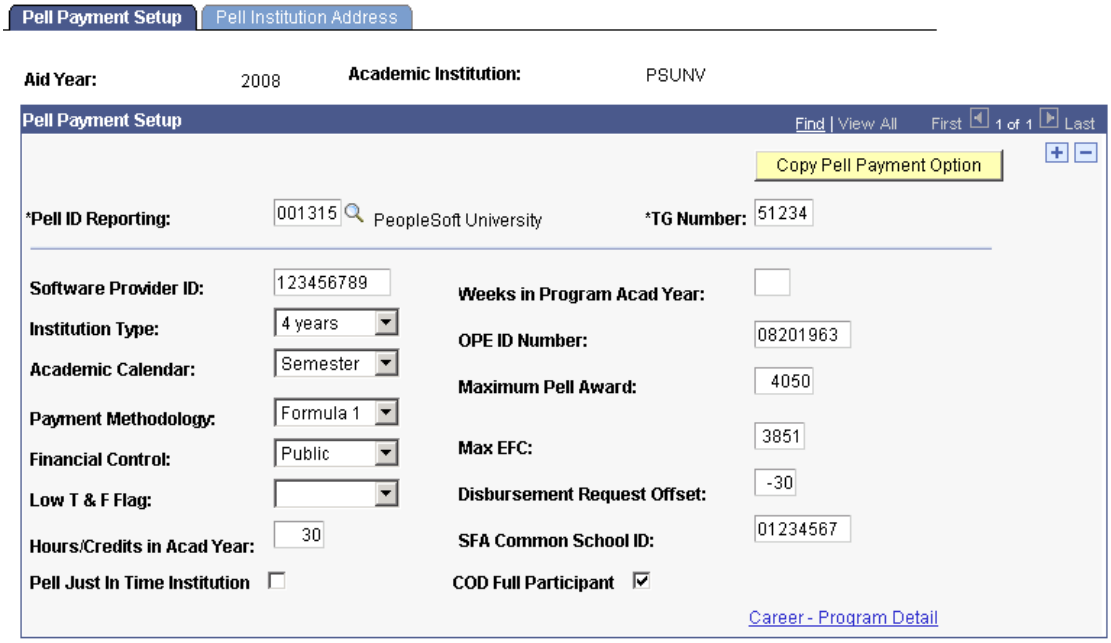
Page Name	Definition Name	Navigation	Usage
Pell Payment Setup	PELL_PMT_OPTION	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell Payment**, and then **Pell Payment Setup**	Define Pell payment information to include Pell IDs and other reporting data for Pell payment records to common origination disbursement (COD).
Copy Pell Payment Options	PELL_PMT_OPTN_COPY	Click the **Copy Pell Payment Option** button on the Pell Payment Setup page.	Copy Pell payment options, including academic institution, aid year, and Pell ID reporting setup data from one aid year to another.
Pell Payment Detail	PELL_PMT_SEC	Click the **Career - Program Detail** button on the Pell Payment Setup page.	Change Pell payment default information. Set up a career and program at the institution when the payment program differs from the default payment schedule or formula.

Defining Pell Payment Setup

Access the Pell Payment Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell Payment**, and then **Pell Payment Setup**).

This example illustrates the fields and controls on the Pell Payment Setup page. You can find definitions for the fields and controls later on this page.

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Warning

Do not change Pell ID Reporting values in the middle of an aid year. The Pell Grant payment and origination processes reference student awards which are in an Institution context and not directly related to a Pell ID. The Pell ID Reporting for Pell Grant processing is derived from the Institution using the Pell Payment Setup.

Field or Control	Description
Pell ID Reporting	Select to identify an institution. After the Pell ID reporting number is defined for the institution, any school that you associate with your institution, such as an off-site campus, is associated with your primary institution.
TG Number	Enter your TG identification number. This number corresponds to your SAIG mailbox and identifies your school as a destination point.
Software Provider ID	Enter the ID provided by COD. This field is optional.
Institution Type	Select one of the following values: *5 years, 4 years, Less than 1 yr, Less than 2 yrs, Less than 3 yrs,* or *Less than 4 yrs.*

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Field or Control	Description
Academic Calendar	This field is optional. Values are: *Clock Hour:* Measures academic progress by clock hours. *Crdt Hr NS* (credit hour nonstandard term): Uses nonstandard academic terms, and measures progress by credit hours or units. The Financial Aid system does not support this Pell calculation. *Credit Hr w/o Trm* (credit hour without term): Does not use terms, and measures academic progress by credit hours. The Financial Aid system does not support this Pell calculation. *Quarter:* Uses standard term quarters, and measures academic progress by quarter hours. *Semester:* Uses standard term semesters, and measures academic progress by semester hours. *Trimester:*Uses standard term trimesters, and measures academic progress by semester or trimester hours.
Payment Methodology	This field is optional. Values are: *Formula 1*, *Formula 2*, *Formula 3*, *Formula 4*, *Formula 5*, and *(none).* **Note:** The Financial Aid system does not support the Pell calculation for academic calendars tracked by clock hour or hours without terms. This includes awarding for Formulas 4 or 5, which are used by institutions with academic calendars tracked by clock hour or hours without terms. The system uses Formula 1.

This table describes each payment methodology value:

Payment Methodology	Description
Formula 1	Applies to a standard term, credit-hour program that meets the following conditions: • The program uses an academic calendar that includes two semesters or trimesters (fall and spring) or three quarters (fall, winter, and spring). • The fall through spring standard terms provide at least 30 weeks of instructional time. • The program is not offered with overlapping terms. • Full-time enrollment in every term the school offers in the award year is at least 12 credit hours. For example, if your school offers a summer session, that term must define full-time as at least 12 credit hours.

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Payment Methodology	Description
Formula 2	Applies to a standard term, credit-hour program that meets the same conditions as Formula 1 except that the fall through spring standard terms provide less than 30 weeks of instructional time.
Formula 3	Applies to any term-based, credit-hour program. You must use Formula 3 if the program has any nonstandard terms. Use either Formula 1 or 3 if the program has all standard terms and at least 30 weeks of instructional time. Use either Formula 2 or 3 if the program has all standard terms and less than 30 weeks of instructional time.
Formula 4	Applies to a clock-hour program or a credit-hour program without terms.
Formula 5	Applies to nonresidential correspondence programs.

Field or Control	Description
Financial Control	Select to indicate whether the institution is *Proprietary, Prvt. Nprft* (private and nonprofit), or *Public.*
Low T&F Flag (low tuition and fees flag)	The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category, as mandated by the Department of Education for each award year. Values are: *(none), 0, Range 1,* and *Range 2.*
Hours/Credits in Acad Year (hours or credits in academic year)	This field is optional. You can save the page without entering data in this field. Enter the number of hours or credits in the academic year of the program.
Pell Just In Time Institution	Select to indicate the Pell funding method if the institution is participating in the just-in-time program. Use this field for processing disbursement records.
Weeks in Program Acad Year (weeks in program academic year)	This field is optional. You can save the page without entering data in this field. Enter the number of weeks of instructional time in the academic year of the program. For example, if the payment methodology is Formula 1, you would enter *30* to represent 30 weeks of instructional time.
Maximum Pell Award	Enter the maximum Pell award amount for the academic year. If awards greater than the defined amount exist, the system does not originate those students.
Max EFC (maximum expected family contribution)	Enter the maximum amount of expected family contribution used to calculate a Pell Grant.

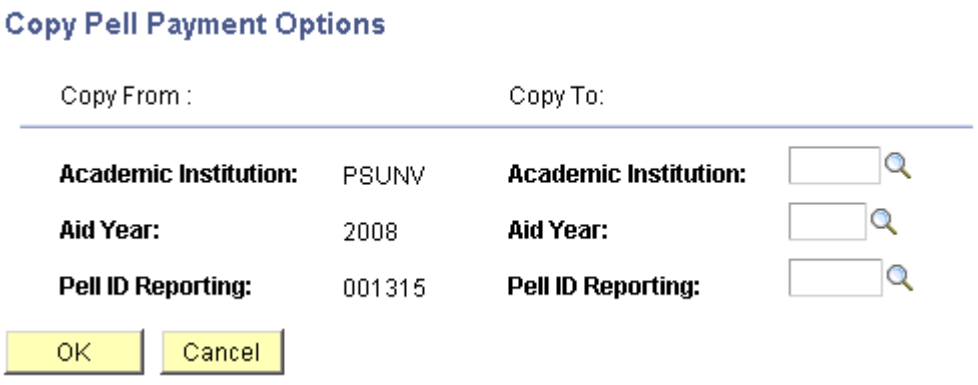
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Field or Control	Description
Disbursement Request Offset	Enter a value that represents how many days before your school sends out the disbursement. The number that you enter in this field determines how many days before (negative) or after (positive) the disbursement date you send disbursement records. This value is used in the selection for the outbound disbursement process. You can send disbursement records up to 30 days before disbursement for advance funding schools and up to 5 days before disbursement for just-in-time schools.
SFA Common School ID (student financial assistance common school identification)	The system activates this field only if the **COD Full Participant** check box is selected. The school identifier is common across the Pell Grant and Direct Loan programs. It is a randomly generated eight-digit number assigned by the Department of Education. It serves as the Entity ID required in the School Entity, Reporting School, and Attending School fields of the XML file.
COD Full Participant (common origination disbursement full participant)	Select if the institution is a COD Full Participant to generate, send, and receive a COD XML file. **Note:** If this check box is selected, you cannot generate the EC Agent flat file.
Copy Pell Payment Option	Click to access the Copy Pell Payment Options page, where you can copy setup data from one aid year to another.
Career - Program Detail	Click to access the Pell Payment Detail page. Use this page to set up a career and program at the institution when the payment program differs from the default payment schedule or formula.

Copying Pell Payment Options

Access the Copy Pell Payment Options page (click the **Copy Pell Payment Option** button on the Pell Payment Setup page).

This example illustrates the fields and controls on the Copy Pell Payment Options page.



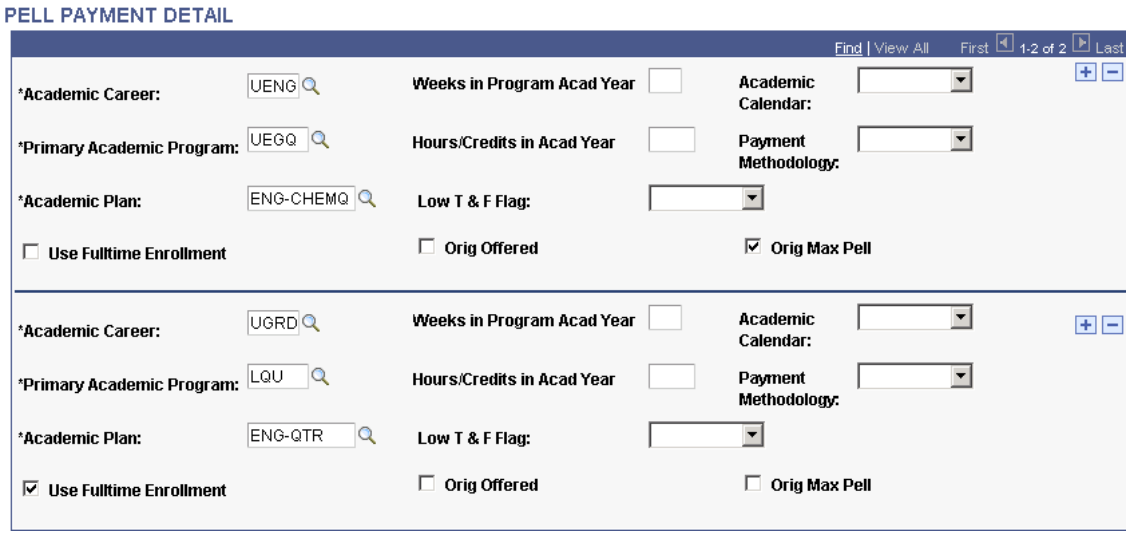
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In the **Copy To** section, select the academic institution, aid year, and Pell ID reporting.

Changing Pell Payment Default Information

Access the Pell Payment Detail page (click the **Career - Program Detail** button on the Pell Payment Setup page).

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



Field or Control	Description
Academic Career	Select a career defined by the institution.
Primary Academic Program	Select a program defined by the institution.
Academic Plan	Select a plan defined by the institution.
Weeks in Program Acad Year (weeks in program academic year)	This field is optional. Enter the number of weeks of instructional time in the academic year of the program.
Hours/Credits in Acad Year (hours or credits in academic year)	This field is optional. Enter the number of hours or credits in the academic year of the program.
Academic Calendar	This field is optional. Select from these values: *Clock Hour*, *Crdt Hr NS* (credit hour nonstandard terms), *Quarter*, *Semester*, *Trimester*, and *Hr w/o Terms* (hour without terms).
Payment Methodology	This field is optional. Select from these available formulas to calculate the student's Pell Grant: *Formula 1*, *Formula 2*, *Formula 3*, *Formula 4*, *Formula 5*, and *(none)*.
Low T & F Flag (low tuition and fees flag)	Identifies annual tuition that falls into the low tuition category as mandated by the Department of Education for each award year. Select from the values: *(none)*, *0*, *Range 1*, and *Range 2*.

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Field or Control	Description
Use Fulltime Enrollment	Select to use full-time enrollment. The system builds the field for all originated students using full-time enrollment, regardless of the student's actual enrollment. For example, if you select this check box and a student is enrolled part-time, the system reports the student as full-time. To report and originate a student as full-time with maximum Pell, you must also select the **Orig Max Pell** check box.
Orig Offered (originate offered)	If you select this check box, the system does not update the disbursement tables to reflect the actual Pell amount. When you are ready to send in the disbursement request, you must accept the Pell award, rerun origination, and then run the disbursement outbound process. If you do not go back and run origination, the disbursement outbound process does not pick up students whose Pell disbursements are zero. When you select this check box, you can originate a student's award with an award status of *Offered*.
Orig Max Pell (originate maximum Pell)	Select to direct the system to originate the maximum Pell award amount for all processed students in that career program plan. The maximum Pell award is defined on the Pell Payment Setup page (PELL_PMT_OPTION).

Setting Up Pell Reporting Identification Data and Processing Options

To set up Pell reporting identification data and processing options, use the Pell Payment component (PELL_SETUP_PNL).

This section discusses how to define Pell reporting identification data.

Page Used to Set Up Pell Reporting Identification Data and Processing Options

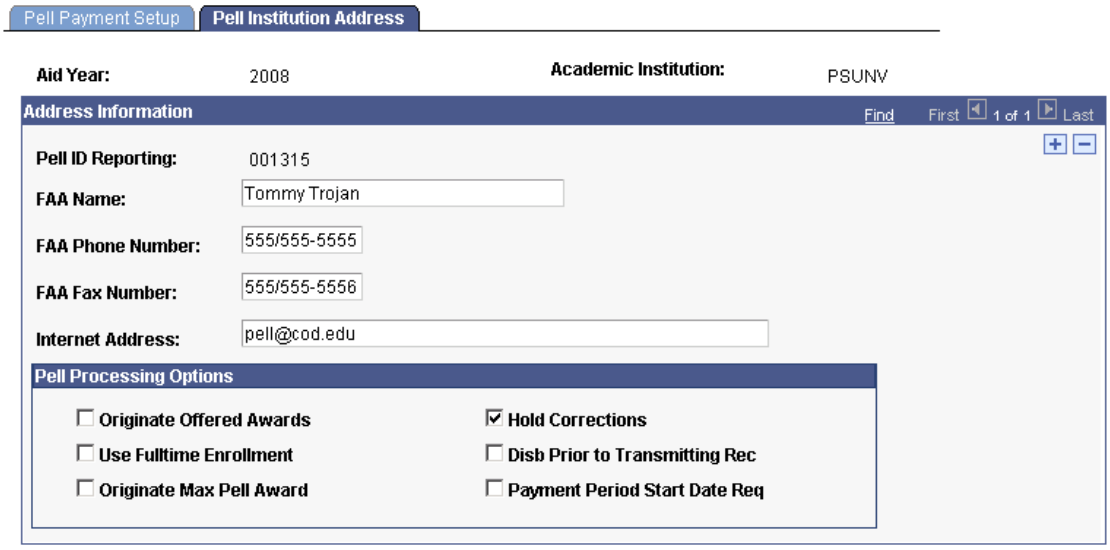
Page Name	Definition Name	Navigation	Usage
Pell Institution Address	PELL_INST_ADDRESS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell Payment**, and then **Pell Institution Address**	Define Pell reporting identification data. Include the Pell reporting ID data, contact information, and processing options.

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Defining Pell Reporting Identification Data

Access the Pell Institution Address page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell Payment**, and then **Pell Institution Address**).

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



Field or Control	Description
Pell ID Reporting	Displays the identification code assigned to the institution by the Department of Education and used during the exchange of electronic data.
FAA Name (financial aid administrator name), **FAA Phone Number** (financial aid administrator phone number), **FAA Fax Number** (financial aid administrator fax number), and **Internet Address**	Enter the name, phone number, fax number, and internet address of the financial aid administrator.
Originate Offered Awards	Select to originate Pell awards with an award status of offered. Otherwise, the system originates only awards in offer or accept status.
Use Fulltime Enrollment	Select to use full-time enrollment. The system builds the field for all originated students using full-time enrollment, regardless of the student's actual enrollment. For example, if you select this check box and a student is enrolled part-time, the system reports the student as full-time. To report and originate a student as full-time with maximum Pell, you must also select the **Originate Max Pell Award** check box.

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Field or Control	Description
Originate Max Pell Award (originate maximum Pell award)	Select to direct the system to originate the maximum Pell award amount for all originated records. The maximum Pell award is defined on the Pell Payment Setup page (PELL_PMT_OPTION).
Hold Corrections	Select to hold corrections. The student record goes on hold when the acknowledgment comes back with corrections. Further processing cannot occur until the status is set back to ready.
Disb Prior to Transmitting Rec (disburse prior to transmitting record)	Select to verify that Pell Grant funds have been disbursed to the student's account before you transmit a disbursement record. The disbursement process does not pick up a student's disbursement record until the student has been paid through PeopleSoft Student Financials.
Payment Period Start Date Req (payment period start date required)	Select to indicate that the institution is ineligible. You cannot process a disbursement request unless the process date is equal to or greater than the reported disbursement date.

Setting Up Pell Multi-Campus Identification

To set up Pell multi-campus identification, use the Pell Attending component (PELL_ATTENDING).

This section discusses how to define Pell multi-campus identification.

Page Used to Define Pell Multi-Campus Identification

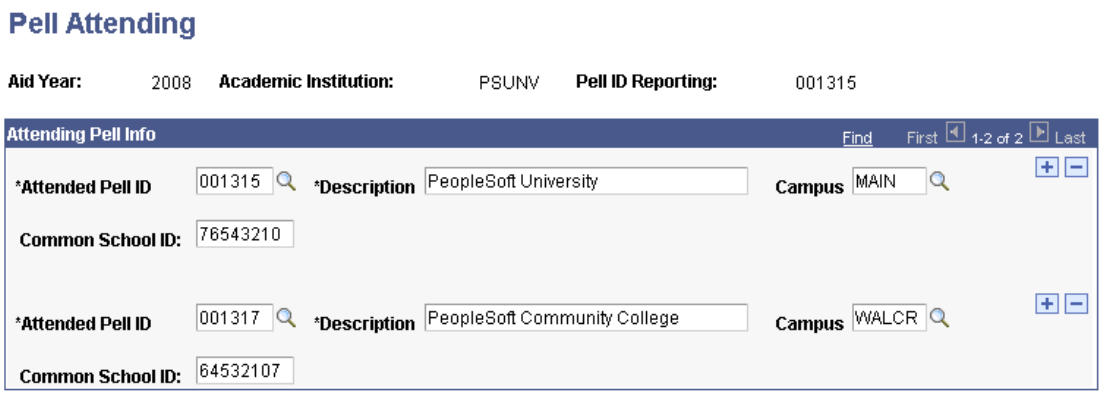
Page Name	Definition Name	Navigation	Usage
Pell Attending	PELL_ATTENDING	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell ID Attending**, and then **Pell Attending**	Define Pell multi-campus identification. Assign a Pell and Common School ID for each of your individual campuses to maintain separate statistics for each campus.

Defining Pell Multi-Campus Identification

Access the Pell Attending page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell ID Attending**, and then **Pell Attending**).

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

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Assign a Pell ID for individual campuses to maintain separate statistics for each campus. Individual campuses or schools must use the Pell ID of the main institution for reporting Pell information.

Field or Control	Description
Attended Pell ID	Select the code assigned to the institution by the Department of Education. This code is the attending ID for which the student is enrolled. Origination records are pulled from each campus for each student.
Description	Enter a site description.
Campus	Select the campus that coincides with the ID and description.
Common School ID	Enter the eight-digit number assigned by the Department of Education. The system uses this identifier in conjunction with the SFA Common School ID. If the reporting school and attending school are the same, this number is identical.

Setting Up Severity Levels for Pell Comment Codes

To set up severity levels for Pell comment codes, use the Pell Comment Code component (PELL_COMM_CD_TABLE).

This section discusses how to:

- Define severity levels for Pell comment codes.
- Copy Pell comment codes.

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Pages Used to Define Severity Levels for Pell Comment Codes

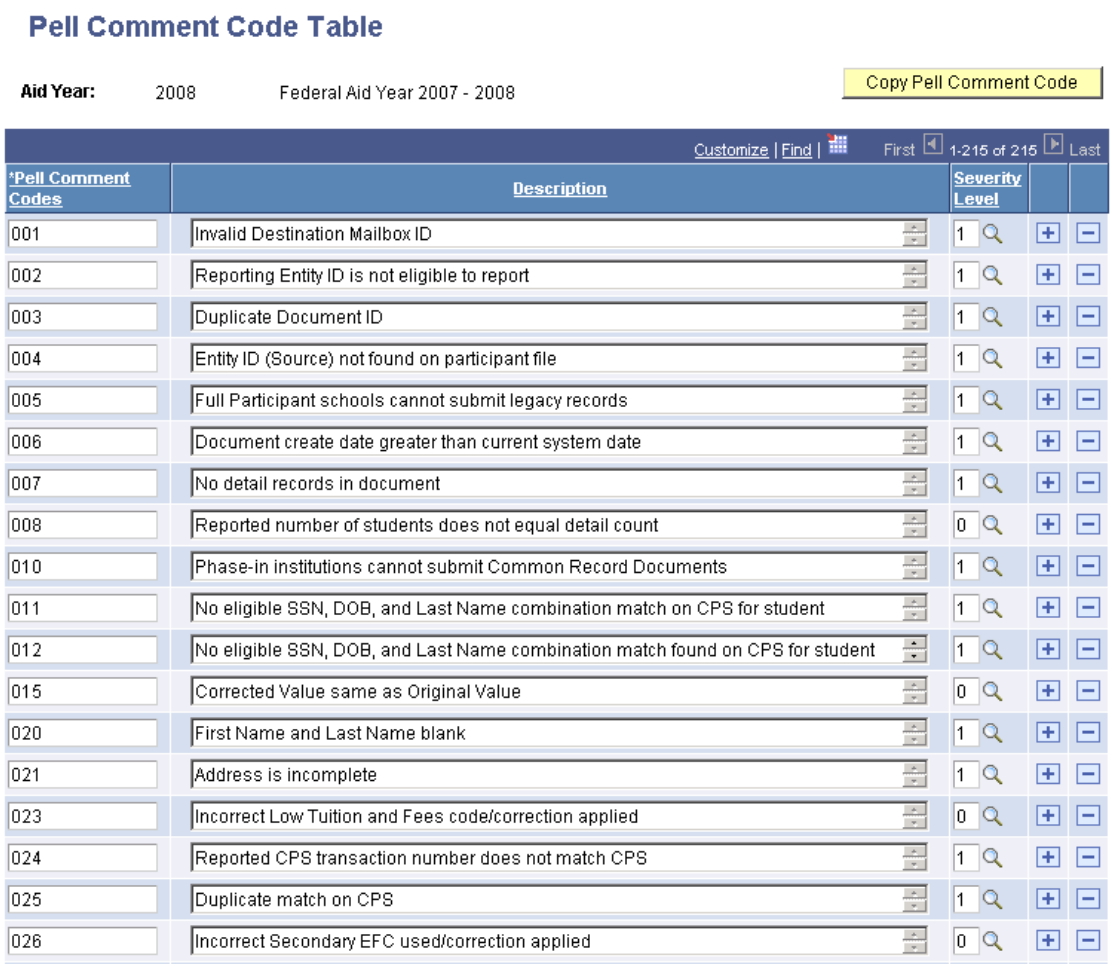
Page Name	Definition Name	Navigation	Usage
Pell Comment Code Table	PELL_COMM_CD_TABLE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell Comment Code**, and then **Pell Comment Code Table**	Define severity levels for Pell comment codes to indicate what action you want to system to take.
Copy Pell Comment Codes	PELL_COMM_CD_COPY	Click the **Copy Pell Comment Code** button on the Pell Comment Code Table page.	Copy Pell comment codes from one aid year to another.

Defining Severity Levels for Pell Comment Codes

Access the Pell Comment Code Table page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell Comment Code**, and then **Pell Comment Code Table**).

This example illustrates the fields and controls on the Pell Comment Code Table page. You can find definitions for the fields and controls later on this page.

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Pell Comment Code Table

Aid Year: 2008 Federal Aid Year 2007 - 2008

Copy Pell Comment Code

Customize | Find | First 1-215 of 215 Last

*Pell Comment Codes	Description	Severity Level
001	Invalid Destination Mailbox ID	1
002	Reporting Entity ID is not eligible to report	1
003	Duplicate Document ID	1
004	Entity ID (Source) not found on participant file	1
005	Full Participant schools cannot submit legacy records	1
006	Document create date greater than current system date	1
007	No detail records in document	1
008	Reported number of students does not equal detail count	0
010	Phase-in institutions cannot submit Common Record Documents	1
011	No eligible SSN, DOB, and Last Name combination match on CPS for student	1
012	No eligible SSN, DOB, and Last Name combination match found on CPS for student	1
015	Corrected Value same as Original Value	0
020	First Name and Last Name blank	1
021	Address is incomplete	1
023	Incorrect Low Tuition and Fees code/correction applied	0
024	Reported CPS transaction number does not match CPS	1
025	Duplicate match on CPS	1
026	Incorrect Secondary EFC used/correction applied	0

This page defines the Pell Comment Codes from the Department of Education.

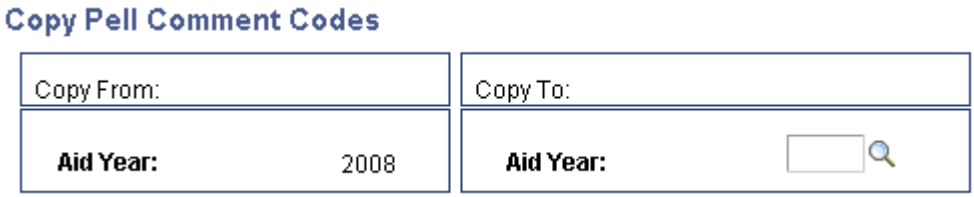
Field or Control	Description
Pell Comment Codes	Lists the identification number assigned to a specific Pell comment.
Description	Describes the Pell comment code.
Severity Level	Select one of the following severity levels to indicate the action that you want the system to take. *0* - Ignore: The system disregards the message. *1* - Action Required: The institution's Pell processor is required to take action to resolve the issue.
Copy Pell Command Code	Click this button to access the Copy Pell Comment Codes page, where you can copy the setup data from one aid year to another.

Copying Pell Comment Codes

Access the Copy Pell Comment Codes page (click the **Copy Pell Comment Code** button on the Pell Comment Code Table page).

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This example illustrates the fields and controls on the Copy Pell Comment Codes page.



Select an aid year from the values in the **Copy To** group box.

Defining Reconciliation Periods

To set up reconciliation periods, use the Reconciliation Periods component (PROG_CASH_PER).

This section discusses how to define reconciliation periods.

Page Used to Define Reconciliation Periods

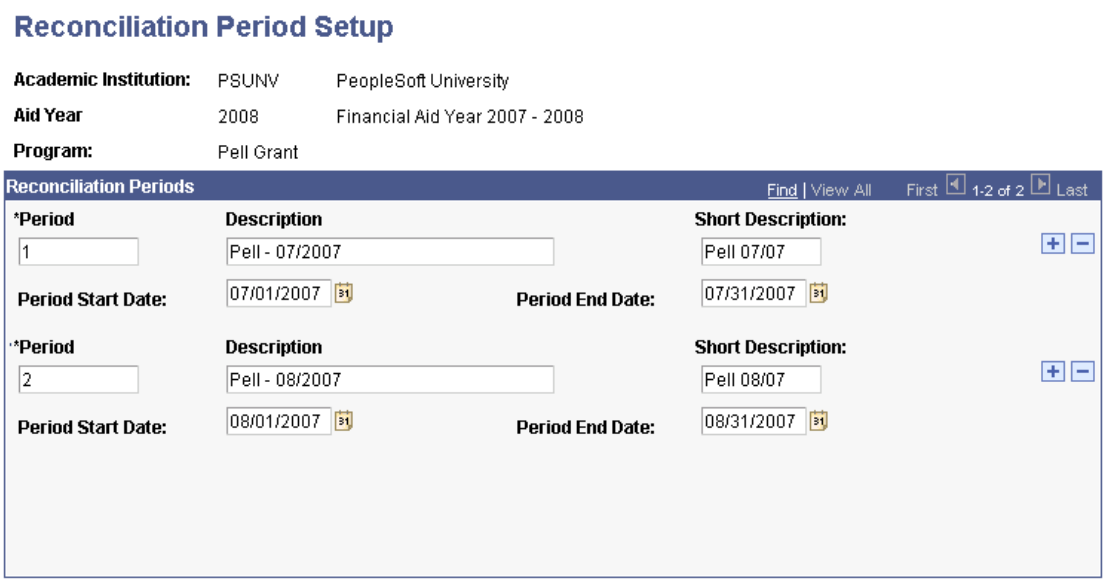
Page Name	Definition Name	Navigation	Usage
Reconciliation Period Setup	PROG_CASH_PER	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Reconciliation Periods**, and then **Reconciliation Period Setup**	Define reconciliation periods for cash management.

Defining Reconciliation Periods

Access the Reconciliation Period Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Reconciliation Periods**, and then **Reconciliation Period Setup**).

This example illustrates the fields and controls on the Reconciliation Period Setup page. You can find definitions for the fields and controls later on this page.

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You can track requests for funds and determine the frequency of reporting by establishing beginning and ending dates for each reconciliation period.

Field or Control	Description
Period	Enter the period that the reconciliation covers.
Description and **Short Description**	Enter a description for the period that the reconciliation covers.
Period Start Date and **Period End Date**	Enter the start and end dates (month, day, and year) that the reconciliation period covers. For example, if your institution reconciles on a monthly basis, enter the reconciliation period number for that month and the start and end date for the period. You can insert rows to enter additional reconciliation periods.

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14

Setting Up the Perkins MPN

Understanding the Perkins MPN Setup

The Perkins MPN sSetup provides a high-level processing structure for both Perkins MPN and eMPN. The system prints information entered by the school to the Perkins MPN document. In addition to the following setup pages, you must also use the Awarding Options page (SS_FA_INSTALL2) in self service to set up the Perkins eMPN self-service authentication method and to define additional references.

Setting Up the Perkins MPN

This section discusses how to:

- Define Perkins MPN options.
- Define type of name, address, and telephone number usage.
- Define MPN requirement for financial aid item types.

Pages Used to Set Up the Perkins MPN

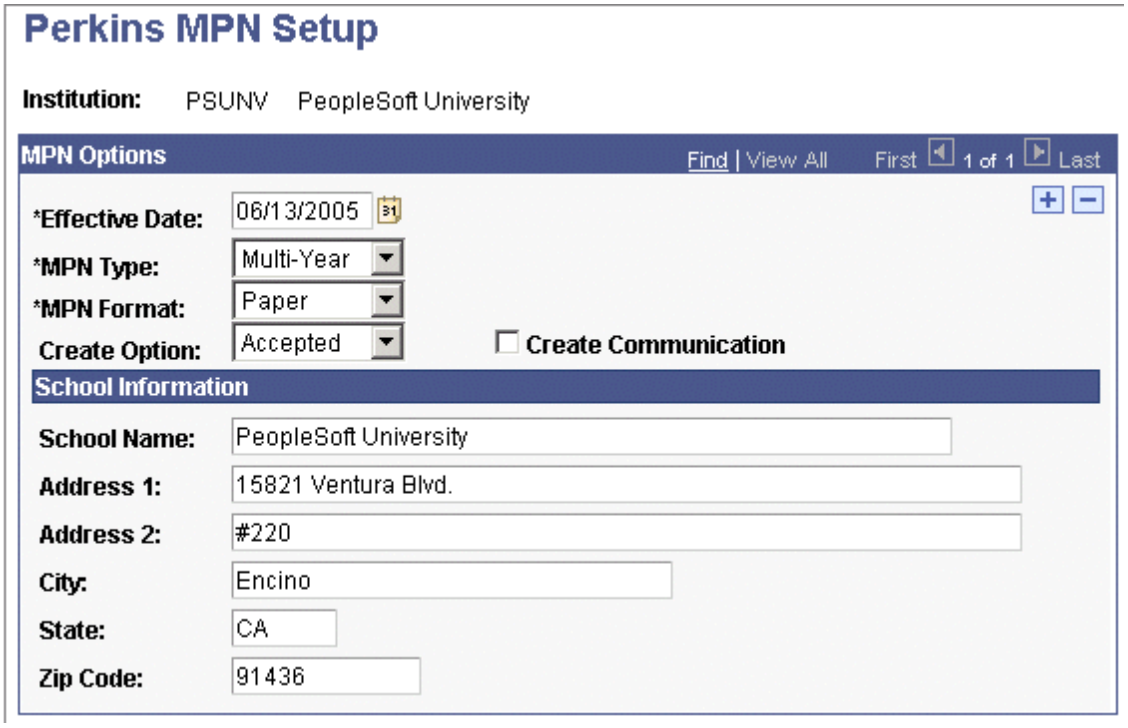
Page Name	Definition Name	Navigation	Usage
Perkins MPN Setup	SFA_PERK_MPN_SETUP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Setup Perkins MPN Options**, and then **Perkins MPN Setup**	Define Perkins MPN options and enter school name and address.
FA Process Demographic Use	FA_PRCSDEMO_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**	Indicate where to retrieve the student demographic information for loan processing. The Perkins MPN process extracts borrowers' demographic information from PeopleSoft Campus Community.
FA Item Type 1	ITEM_TYPE_FA_1	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 1**	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.

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Defining Perkins MPN Options

Access the Perkins MPN Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Setup Perkins MPN Options**, and then **Perkins MPN Setup**).

This example illustrates the fields and controls on the Perkins MPN Setup page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Effective Date	The system provides this value to enable institutions to maintain a history of processes for audit and accounting periods. Because this page is effective-dated, institutions can move from one process to another within an award year. For example, an institution may start off as an annual MPN school and move to a multi-year MPN school within an award year.
MPN Type (master promissory note type)	Select one of these values: *Multi-Year:* Borrowers are required to sign once throughout their academic career. *Annual:* Borrowers are required to sign a note once each award year for all loans made for that award year.

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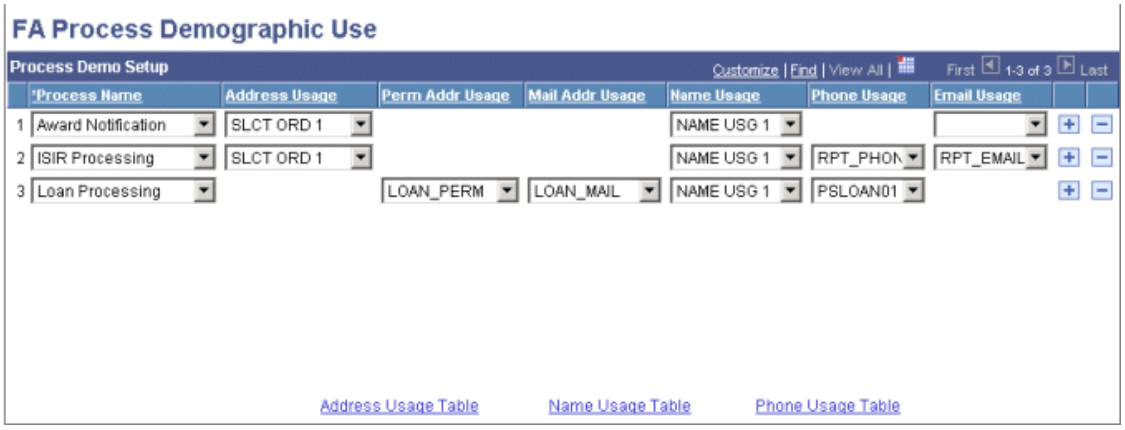
Field or Control	Description
MPN Format (master promissory note format)	Select one of these values: *Paper:* Select to provide a paper version of the MPN. This option supports the selection of students in batch for the Print Perkins MPN process. *Electronic:* Select to enable a student to electronically sign an MPN over the web using self service. **Note:** You can still generate paper MPNs if *Electronic* is selected. Within the self-service Perkins eMPN process, students can leave the Perkins eMPN process and request a paper MPN. In addition, you can use the *Student Override* option on the Print Perkins MPN run control page to print individual student MPNs.
Create Option	Select one of these values: *Accepted:* Generate an MPN only if the award status is *Accepted.* *Offered:* Generate an MPN if the award status is *Offered.* **Note:** If you select *Offered* and the award is accepted with no MPN record created, the system includes those students in the selection. The **Offered** option is only applicable for the batch Print Perkins MPN process. To proceed, the self-service Perkins eMPN process requires awards to be accepted.
Create Communication	Select this check box to write a communication when the MPN is generated. You can use communication as an additional tracking tool. To generate a communication, you must add a Communication Category called PMPN with a function of LOAN. You should add the PMPN Category to the Communication 3C Group. The Communication Speed Key of LOAN should also have an entry of PMPN. **Note:** A communication is not required for the process to run or for the loan to be disbursed.
School Name	Enter the institution's name. This information is required for the MPN.
Address 1, Address 2, City, State, and **Zip Code**	Enter the institution's address information. This information is required for the MPN.

Defining Type of Name, Address, and Telephone Number Usage

Access the FA Process Demographic Use page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**).

This example illustrates the fields and controls on the FA Process Demographic Use page.

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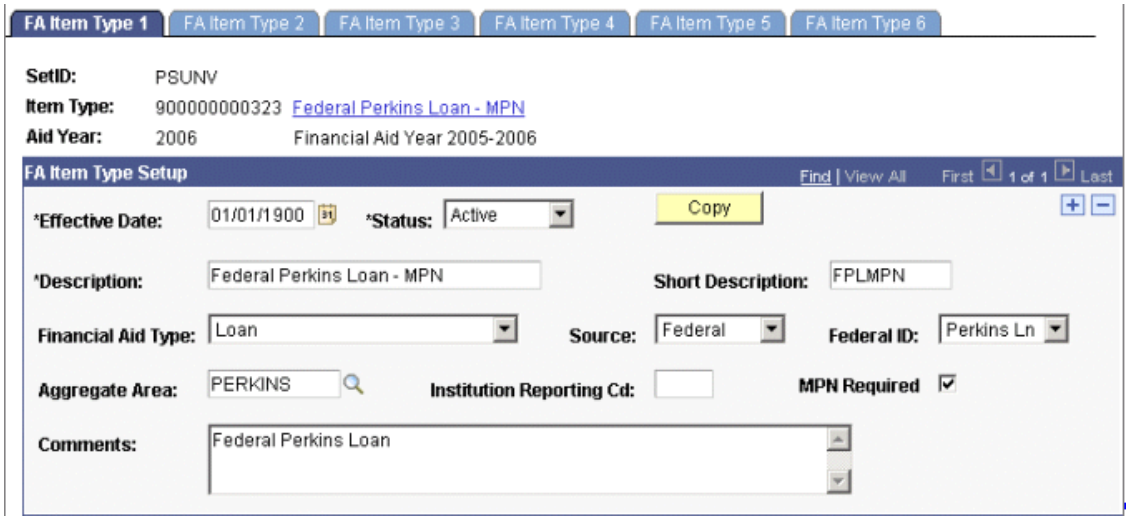
Based on the requirements of your institution, define what type of name, address, and telephone number you want printed on the MPN. Because the Perkins MPN process looks at the loan processing usage, coordination across all loan programs is required.

> **Note**
>
> The Email Usage column includes loan processing for CRC processing.

Defining MPN Requirement for Financial Aid Item Types

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

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



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Field or Control	Description
MPN Required (master promissory note required)	Select this check box to indicate that an MPN is required for the financial aid item type awarded to the student. The Perkins MPN electronic signature and print processes use this flag to determine which financial aid item types should be assessed if an MPN is required. If selected, the financial aid disbursement authorization process requires a valid Perkins MPN before the award can be authorized and disbursed. **Note:** You must select *Perkins Ln* as the value in the **Federal ID** field for the system to display the **MPN Required** check box.

> **Note**
>
> You should create new item types and corresponding financial aid item types when you enable the new Perkins MPN process. They allow you to track new Perkins MPNs, and they do not negatively affect individuals who currently have a signed and valid Perkins MPN on file.

Related Topics

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

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15

Setting Up Disbursement Rules

Understanding Disbursement Rules

This section provides a list of prerequisites and an overview of:

- Disbursement rules.
- Disbursement proration rules.
- Global disbursement rules.
- Item type disbursement rules.
- Authorization and disbursement calendars.
- Disbursement ID Table (DISBURSE_ID_TABLE) review.

Prerequisites

Before setting up disbursement rules, you must:

- Set up your institution's financial aid item types and packaging disbursement plans and IDs for the aid year for which you are processing disbursements. These tasks are part of your setup for awarding students.
- Define the FA-BUDGET item grouping in PeopleSoft Student Financials.
- Understand how service impacts and checklists affect your financial aid processes.
- Define the specific eligibility criteria necessary to authorize the disbursement of your financial aid funds to students.

Related Topics

- Campus Community Fundamentals: Understanding Checklists
- Student Financials: Setting Up Item Types and Item Type Groups

Disbursement Rules

Authorization and disbursement are the two parts of delivering financial aid funds to students:

- The authorization process applies user-defined global and financial aid item type specific disbursement rules to determine whether awards are eligible for disbursement and determines the amount eligible for disbursement.
- When the awards are successfully authorized, disbursement is the actual delivery of financial aid funds to the student's account in Student Financials.

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> **Warning**
>
> To ensure that the Financial Aid Authorization and Disbursement processes function correctly, implement Student Financials first. Implementing Financial Aid without Student Financials requires the creation of modified interfaces to update the Financial Aid loan system with confirmation that student loan funds have been applied to the student's account.

You define authorization process rules by aid year, career, and award (financial aid item type). These rules allow or prevent the disbursement of awards for students in a particular career or for a particular award. A Validation process during awarding or packaging checks on a variety of rules and limits, but student information, particularly registration information, can change before disbursement occurs. The Authorization process checks rules just before the disbursement of awards, either online or in a background authorization process.

Global disbursement rules can apply to all students in a particular career and check that packaging, federal verification, and review of the student's financial aid files are complete. Service impacts and tracking groups can be checked as a global rule. Global rules can hold financial aid if the student has withdrawn, honor any disbursement hold that might exist elsewhere in the system, and withhold disbursement for unsatisfactory academic progress.

Item type disbursement rules for particular awards are associated with a career, so different rules can be defined for each career in which the award is used. Many disbursement rules can be applied to an award, such as:

- Checking a student's academic load and academic level against the load and level used to determine thee student's budget or award package.
- Holding if a student is overawarded, has withdrawn, or has other holds in the system.
- Verifying membership in a particular student group, such as an ethnic group, athletic team, geographic location, honor students, or particular field of study.
- Using checklists, tracking groups, or service impacts.

The background disbursement process uses disbursement and authorization calendars to determine when awards can be disbursed to students:

- Authorization calendars indicate the careers and terms that are eligible for authorization and if aid can be authorized more than once for that term, or *reauthorized.* Reauthorization retests the student's eligibility criteria to ensure that the student is still eligible for awards previously authorized and that changes made after the prior authorization have not made the student ineligible for the award.
- Disbursement calendars control which awards, by career, are disbursed for a particular term. You can disburse all awards, all awards except a defined subset, or only a subset of awards. Use the disbursement calendar to control when certain awards are disbursed during the aid year.

The calendars are both effective-dated so you can set up your background disbursement plans for the entire aid year with effective dates for your second, third, and subsequent terms that determine when the awards are disbursed. Alternatively, you can use the same effective date on your calendar for all terms and use run control parameters to control the order in which awards are disbursed. Run control parameters can restrict the background authorization and disbursement processes to only a subset of terms and financial aid item types or can improve processing efficiency by dividing the total population of aid students into several smaller groups that you run sequentially.

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Disbursement Proration Rules

If financial aid at your institution is always awarded based on a full time academic load or you have funds for which a full time academic award is assumed, you can set proration rules for specific awards. Use proration rules to base the disbursement for specific awards on a student's enrollment load instead of using the default full time award amount. The term award amount is prorated based on a formula that you set up on the Disbursement Proration Rules page. The proration is calculated for each disbursement for an award and the amounts can vary depending on the term each disbursement is assigned.

Disbursement proration rules are most useful for nonfederal awards and institutional funds for which the award amount should be based on the academic load of the student. You can apply a disbursement proration rule to a financial aid item type when you define the financial aid item type's disbursement rules—on the Disbursement Rules: Item Type - Indicators page.

> **Note**
>
> Disbursement proration rules should *not* be set up for Pell Awards if you select *Enrollment FA Load* or *Enrollment Current Load* in any of the Pell calculation fields **Pell Calculation Start, Pell Calculation Midterm,** and **Pell Calculation Census.** The Pell Calculator automatically prorates a student's award based on their FA Load or Current Load, Cost of Attendance (COA), and Expected Family Contribution (EFC)/ Student Aid Index (SAI) when you select *Enrollment FA Load* or *Enrollment Current Load.* If you select *Full Time* or *Half Time* for all of the Pell calculation fields, you could use a disbursement proration rule, but be aware that the proration rule reduces the award based on the FA Load *only.*

Related Topics

- Defining Installation Level Defaults

Global Disbursement Rules

The disbursement authorization process uses global disbursement rules that are defined *by career* and apply to all financial aid item types. Use global disbursement rules to set up requirements that all students in the selected career must meet for authorization. Several different elements can be selected in the global disbursement rules, such as service impacts, tracking groups, and academic progress information. For example, you might set up a specific tracking group for students in a certain career. If a student does not meet the items in the tracking group, then the global disbursement rules are not satisfied and the student's aid is not authorized for disbursement.

The disbursement authorization process considers global disbursement rules, defined by career, before it considers item type disbursement rules. In addition, the authorization process verifies whether awards have been accepted and sufficient fiscal funds are available for the disbursement.

Item Type Disbursement Rules

Item type disbursement rules enable you to identify specific criteria that must be met before authorizing individual awards for disbursement. Item type disbursement rules are set up for each career, so if multiple careers use the same item type, you need to define item type disbursement rules for each career. Doing so allows you to select different item type

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disbursement rules for different careers that use the same item type. Item type disbursement rules take effect during authorization and apply to the designated item type only. Set up item type disbursement rules for all awards (financial aid item types) that have specific rules applied to them.

For example, a Perkins loan might require completion of a particular checklist. You can make the Perkins loan disbursement contingent upon completion of the checklist by adding the checklist as part of the item type disbursement rules. If the Perkins loan fails the authorization step and can not be disbursed, all other awards to the student can be authorized and disbursed.

The disbursement authorization process considers global disbursement rules, defined by career, before item type disbursement rules. In addition, the authorization process verifies whether awards have been accepted and that sufficient fiscal funds are available for the disbursement.

Authorization and Disbursement Calendars

Authorization and disbursement calendars are used by the background authorization and disbursement processes only. If you do not use background authorization and disbursement, you do not need to create these calendars. If you set up these calendars, they are not used if you authorize and disburse awards manually (online). For this reason, ensure that access to your online disbursement pages is carefully determined.

Authorization and disbursement calendars must include each term for which you disburse aid for the aid year. Both calendars use separate effective-dated rows. Using both authorization and disbursement calendars and run control parameters gives you flexibility in implementing your institution's authorization and disbursement. For example, you can set up a single effective-dated row for both the authorization and disbursement calendars where all valid terms and financial aid item types are selected, and then use the batch run control parameters to control the term and financial aid item types that are processed.

Alternatively, you can use multiple future effective-dated rows to introduce the terms and financial aid item types that should be processed over the course of the school year and use the batch run control parameters for exception processing only. For example, if you need a fall and spring disbursement calendar, you might set the fall term's effective date in August and the spring term's effective date in December, one month before the beginning of each term. When background authorization and disbursement is run in September, only awards for fall term would be disbursed because only the authorization and disbursement calendars for fall would have a valid effective date. Both disbursement and authorization calendars, with effective dates, should be set up for each term. Review your business processes carefully to determine the best way to set up your background processes.

Disbursement ID Table Review

The Disbursement ID Table is set up when you define disbursement plans and split codes for awards. A disbursement ID is set up for each disbursement that should be associated with a disbursement plan. Each disbursement ID has a disbursement date associated with it to control the disbursements. The background disbursement process uses the disbursement date to determine whether the awards can be disbursed. The background disbursement process only disburses awards if the cutoff date, on the disbursement calendar, is equal to or later than the disbursement date on the Disbursement ID Table. Set up both the cutoff date on the disbursement calendar and the disbursement date on the Disbursement ID Table to ensure that awards are disbursed at the correct time.

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

Related Topics

- Defining Default Disbursement Plans and Split Codes
  Access the FA Item Type 5 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 5**).

Defining User Edit Messages

To set up user edit messages, use the Create User Edit Messages (USER_EDIT_MSGS) component.

This section provides an overview of user edit messages and discusses how to create user edit messages.

Understanding User Edit Messages

User edit messages can act like service impacts or can designate workflow and disbursement processes for use in special handling of students. You can specify that user edit messages affect your disbursement process by assigning a user edit message to a disbursement rule (either global or financial aid item type). Add user edit messages on the Disbursement Rules: Global page and Disbursement Rules: Item Type page.

Page Used to Define User Edit Messages

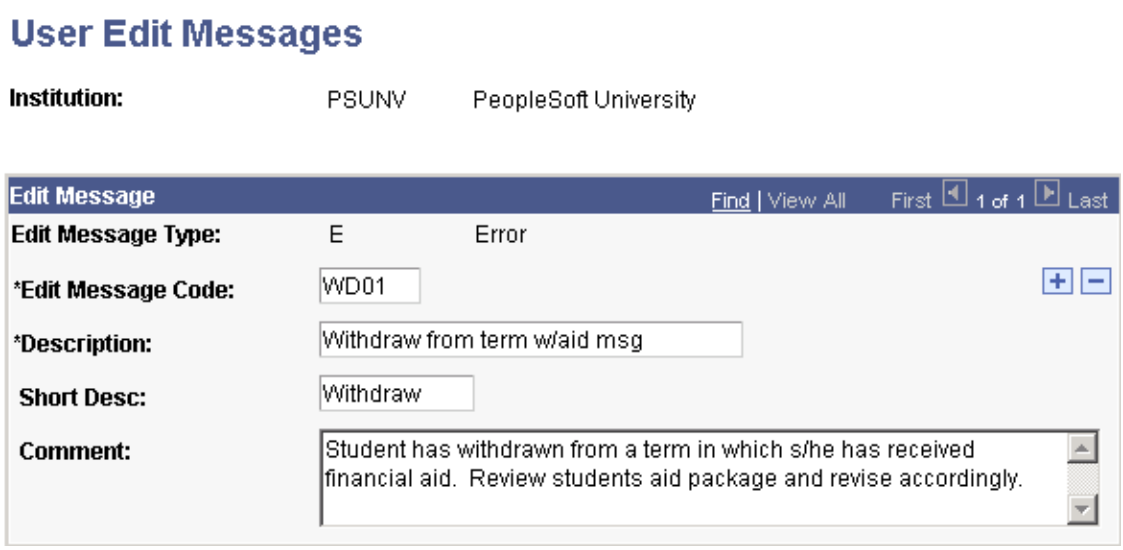
Page Name	Definition Name	Navigation	Usage
User Edit Messages	FA_EDIT_MSG_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Create User Edit Messages**, and then **User Edit Messages**	Create or modify user edit messages. These messages are financial-aid-specific indicators that the disbursement processes can use.

Creating User Edit Messages

Access the User Edit Messages page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Create User Edit Messages**, and then **User Edit Messages**).

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

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Field or Control	Description
Edit Message Type	Displays the categorized edit message. This field is currently used for statistical purposes only and does not control any processing. Values include *Error*, *Informational*, and *Warning*. **Note:** When you enter a new edit message code, select an edit message type to categorize the error message.
Edit Message Code	Enter a code, up to six characters long, to represent this error message. Enter any code that is meaningful to those who use it. This code appears on the Message Detail page in the authorization and disbursement components if the financial aid item type fails authorization.

Setting Up Disbursement Proration Rules

To set up disbursement proration rules, use the Create Proration Rules (DISB_PRORATION) component.

This section discusses how to define a proration scheme.

Page Used to Set Up Disbursement Proration Rules

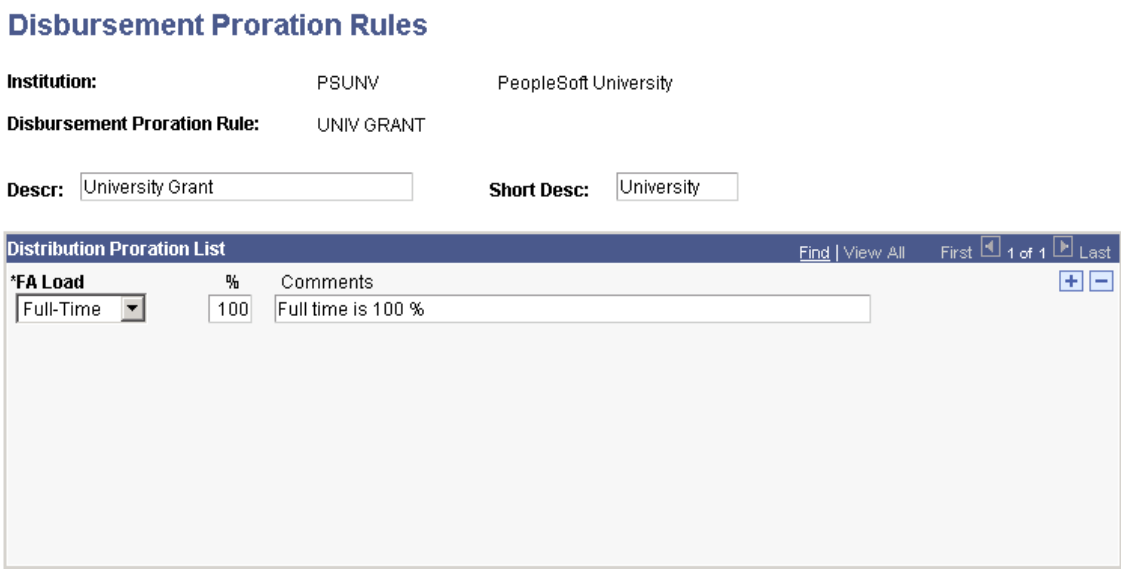
Page Name	Definition Name	Navigation	Usage
Disbursement Proration Rules	DISB_PRORATION	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Create Proration Rules**, and then **Disbursement Proration Rules**	Define a proration scheme. Then use the Disbursement Rules: Item Type - Indicators page to apply the disbursement proration rule to a specific financial aid item type.

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Defining a Proration Scheme

Access the Disbursement Proration Rules page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Create Proration Rules**, and then **Disbursement Proration Rules**).

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



Field or Control	Description
FA Load	Select an enrollment value to include in the proration rule. Insert rows to add all valid FA Load values for your institution. If a student's enrollment does not match any of the values that you select on this page, the system generates an error message when you run the authorization process. FA Load values are defined in the PeopleSoft Student Records Level/Load Rules component. Values are: *Full-Time:* The student is enrolled full-time. *Half-Time:* The student is enrolled half-time. *Less 1/2:* The student is enrolled less than half-time. *No Units:* The student is not enrolled in any units for the term. *Three Qtrs:* (three-quarters): The student is enrolled for three-quarters of a full-time load.
% (percentage)	Enter the percent of the term's disbursement that the student should receive for this enrollment level.

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> **Note**
>
> You should create an award message that tells students why their disbursed amount is less than their awarded amount for awards that use the disbursement proration rule. The award message can be defined for individual financial aid item types.

Related Topics

- Setting Up Award Messages

Defining Global Disbursement Rules

To set up global disbursement rules, use the Define Global Rules (DISB_RULE_GLB) component.

Global disbursement rules are set up by career and affect all students in the career.

This section discusses how to:

- Define basic global rules for authorization.
- Assign service indicators, tracking groups, and user edit messages.

Pages Used to Define Global Disbursement Rules

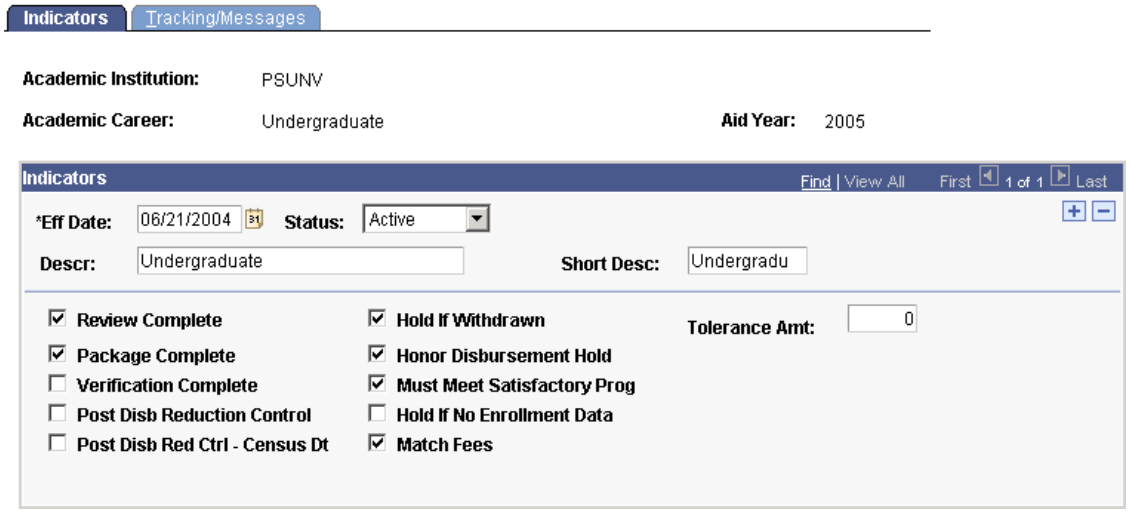
Page Name	Definition Name	Navigation	Usage
Disbursement Rules: Global - Indicators	DISB_RULE_GLB	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Global Rules**, and then **Indicators**	Define basic global rules for authorization. Select specific rules used to hold disbursements of financial aid monies.
Tracking/Messages	DISB_RULE_GLB_2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Global Rules**, and then **Tracking/Messages**	Assign service indicators, tracking groups, and user edit messages to a global disbursement rule.

Defining Basic Global Rules for Authorization

Access the Disbursement Rules: Global - Indicators page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Global Rules**, and then **Indicators**).

This example illustrates the fields and controls on the Disbursement Rules: Global - Indicators page. You can find definitions for the fields and controls later on this page.

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Because these global disbursement rules apply to a particular career, you might want to include the career as part of the description and short description.

Select the reasons that you want disbursement to be held. The authorization process verifies each of the items that you select.

Field or Control	Description
Review Complete	Select this check box to require that an institutional review must be completed before disbursement. The Authorization process requires that the value in the **Review Status** field on the Packaging Status Summary page is *Complete.*
Package Complete	Select this check box to require that packaging must be completed before disbursement. The Authorization process requires that the value in the **Aid Processing Status** field on the Packaging Status Summary page is *Packaging Completed.*
Verification Complete	Select this check box to require that the Department of Education's federal verification must be completed before disbursement. The authorization process requires that the value in the **Verification Flag** field on the Packaging Status Summary page is *Complete* or *Not Required.*

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Field or Control	Description
Post Disb Reduction Control (post disbursement reduction control)	Select this check box to activate post disbursement reduction control, which causes award reductions that cause authorization failures for current terms to be managed in the same way as those for previous terms if money had been previously disbursed. For example, assume that a disbursement has been made after which the award is changed for the current term. If this check box is selected, and authorization of the financial aid item type subsequent to the change fails, the lesser of the disbursed amount or the awarded amount is authorized for disbursement for the current term. The lesser of the disbursed amount or awarded amount is authorized for disbursement in previous terms regardless of whether this check box is selected. If you select this check box, the **Post Disb Red Ctrl – Census Dt** (post disbursement reduction control – census date) check box becomes unavailable. The Disbursement Authorization routine determines current term and prior term using the current date and term end dates. If the current date is before the term end date, that term is the current term. If the current date is after the term end date, that term is a prior term.
Post Disb Red Ctrl – Census Dt (post disbursement reduction control – census date)	Select this check box to use the same rules as the **Post Disb Reduction Control** check box except that only award changes that occur after the census date for the term are evaluated. The disbursement authorization process uses the same census date as the Financial Aid Term build process. The Census Date Locking page, which you access from the FA Term page, displays the census date used. If you select this check box, the **Post Disb Reduction Control** check box becomes unavailable.
Hold If Withdrawn	Select this check box to require that disbursement is held when a student has withdrawn from the institution. If a student withdraws, you might want to reduce the student's financial aid award and manually disburse online. The authorization process searches Financial Aid Term records for withdrawal information.
Honor Disbursement Hold	Select this check box to require the authorization process to honor any disbursement hold that has been entered on the Packaging Status Summary page if the financial aid item type matches the disbursement hold type. The types of awards that can be held are *Fed Aid* (federal aid), *Institut.* (institutional), and *Loan Hold.* Funds are not authorized for disbursement if a disbursement hold exists.

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Field or Control	Description
Must Meet Satisfactory Prog (must meet satisfactory progress)	Select this check box to require that the value in the **Satisfactory Academic Progress** field on the Packaging Status Summary page is *Meets SAP* or *Probation.*
Hold If No Enrollment Data	Select this check box to require that a student's current FA Term record for the award is built from enrollment data in Student Records—not projection data—for disbursements to be authorized. The rule verifies whether the FA Term build source is *Term.* For example, if you select this check box and the student has never enrolled in any classes for the term, no funds are disbursed. The same option is available for financial aid item type disbursement rules. Selecting it here enforces the rule for all students and all of their awards in the career for which this global disbursement rule applies. This rule should be used in conjunction with the **Hold if Withdrawn** and **Minimum Units** rules to insure that the student is still enrolled for the current term.
Match Fees	Select this check box to require that the tuition-related fees on the student's account match the amount calculated in the student's budget to disburse funds. The fees in the student's account are based on the financial aid item types that belong to the FA-BUDGET item grouping (used by the tuition calculation process). This amount is compared to the financial aid budget fees that belong to the TUIT budget category.
Tolerance Amt (tolerance amount)	This field appears when you select the **Match Fees** check box. Enter the largest amount by which the fee and budget item amounts can differ. If the difference between a fee and a budget item is smaller than or equal to the amount entered in this field, the disbursement is authorized; otherwise, the disbursement is held.

Related Topics

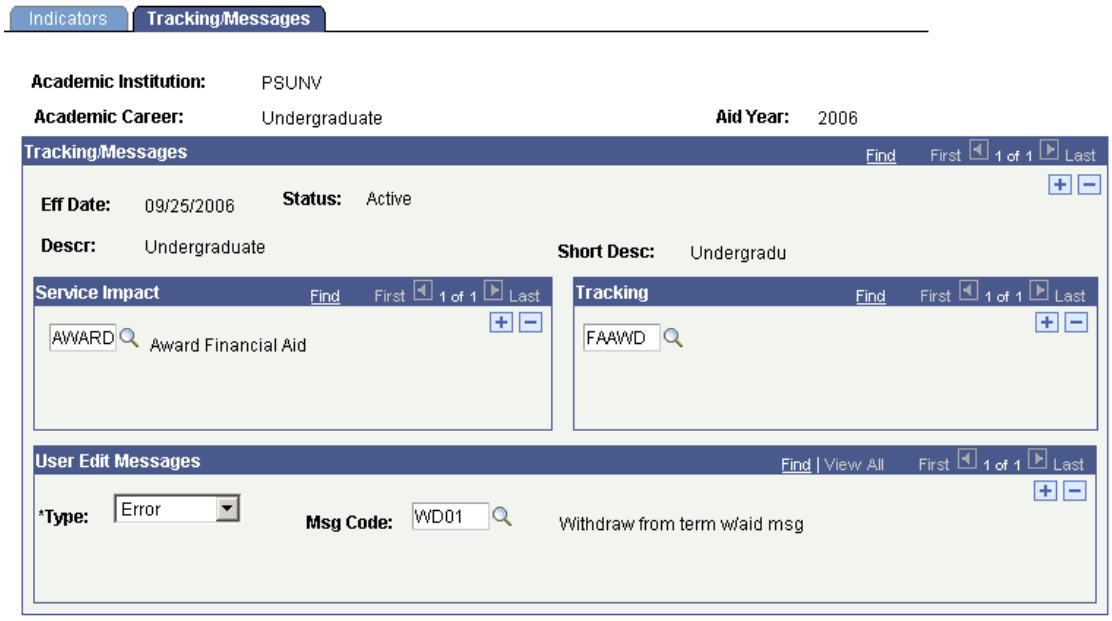
- Reviewing the Packaging Status Summary Page
  Access the Packaging Status Summary page (**Financial Aid**, and then **View Packaging Status Summary**, and then **Packaging Status Summary**).

Assigning Service Impacts, Tracking Groups, and User Edit Messages

Access the Tracking/Messages page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Global Rules**, and then **Tracking/ Messages**).

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

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Service Impact

Select any service impacts to honor global disbursement rules. If a student with this career has an active service indicator with a matching service impact, the authorization process does not authorize the student's awards.

> **Note**
>
> If your institution has upgraded from a previous release of Campus Solutions, review service impacts in the Setting Up Service Indicator Security in the *PeopleSoft Campus Community Fundamentals* documentation.

See Campus Solutions Application Fundamentals: Setting Up Service Indicator Security.

Tracking

Enter the tracking groups that must be completed before financial aid can be disbursed to a student's account. A tracking group can contain one or more checklists. Insert rows to enter additional tracking groups. You can add checklists to disbursement rules in the Disbursement Rules: Item Type component.

User Edit Messages

Enter messages whose presence on a student's record should hold disbursement. User edit messages are special handling instructions that you define for your students. If a student with this career has one of the user edit messages entered in this group box, the authorization process does not authorize that student's awards.

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Field or Control	Description
Type	Indicates the type of user edit message that you want to associate with the global disbursement rule. You can only select user edit messages of this type in the **Msg Code** (message code) field. Insert additional rows to enter additional user edit message types and message codes.
Msg Code (message code)	Enter the message code of the user edit message that causes disbursement to be held. The values are restricted to those with a matching **Type** value.

Defining Item Type Disbursement Rules

To set up item type disbursement rules, use the Define Item Type Rules (DISB_RULE_ITEM) component.

This section discusses how to:

- Define authorization rules for a financial aid item type.
- Define additional restrictions.
- Assign checklists, tracking groups, service indicators, and user edit messages.

Pages Used to Define Item Type Disbursement Rules

Page Name	Definition Name	Navigation	Usage
Disbursement Rules: Item Type - Indicators	DISB_RULE_ITM1	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Types Rules**, and then **Indicators**	Define authorization rules for a financial aid item type. Select specific rules used to hold disbursements of financial aid monies.
Copy Disbursement Rule Data	DISB_RULE_COPY	Click the **Copy Setup Data** link on the Disbursement Rules: Item Type - Indicators page.	Copy disbursement rule setup from one combination of academic institution, aid year, academic career, item type, and effective date to another.

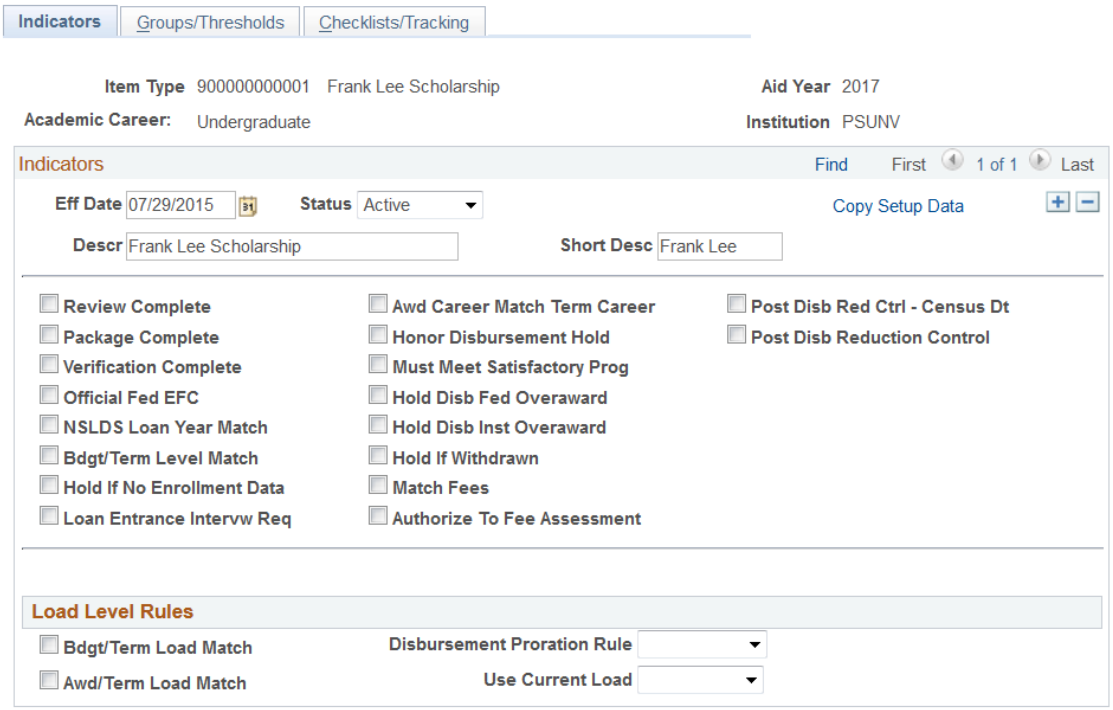
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Page Name	Definition Name	Navigation	Usage
Groups/Thresholds	DISB_RULE_ITM2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Type Rules**, and then **Groups/Thresholds**	Define additional restrictions necessary for disbursement of the item type. Place restrictions by minimum units, by grade point average (GPA) required, by a student's attributes, by academic standing, by home residency, or by academic focus.
Checklists/Tracking	DISB_RULE_ITM3	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Type Rules**, and then **Checklists/Tracking**	Assign checklists, tracking groups, service indicators, and user edit messages to an item type disbursement rule.

Defining Authorization Rules for a Financial Aid Item Type

Access the Disbursement Rules: Item Type - Indicators page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Types Rules**, and then **Indicators**).

This example illustrates the fields and controls on the Disbursement Rules: Item Type - Indicators page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Copy Setup Data	Click this link to access the Copy Disbursement Rule Data page and copy disbursement rule setup from one combination of academic institution, aid year, academic career, item type, and effective date to another. You can also copy item type disbursement rules using the aid year rollover process.

Indicators

Select the reasons that you want disbursement to be held. The Authorization process verifies each of the items that have been selected.

Field or Control	Description
Official Fed EFC/SAI (official federal expected family contribution/student aid index)	Select this check box to require that an official EFC/SAI must be included in the latest Institutional Student Information Records (ISIR) data prior to disbursement.
NSLDS Loan Year Match (National Student Loan Data System loan year match)	Select this check box to require that the loan year information on the budget term table match the student's NSLDS Loan year on the Financial Aid Term.
Bdgt/Term Level Match (budget/term level match)	Select this check box to require that the student's level on the budget term table must match the student's level on the Financial Aid Term before a disbursement can be made.

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Field or Control	Description
Loan Entrance Intervw Req (loan entrance interview requirement)	Select this check box to have the authorization process determine whether a student must complete loan entrance counseling for awards of this item type. If your school uses a Loan Counseling Version of *Expanded,*the authorization process reviews the student's loan counseling history on the Loan Counseling page to determine whether the student has satisfied the requirement. If your school uses a Loan Counseling Version of *Simple,* the authorization process checks the student's NSLDS history for a prior Stafford, Direct, or Supplemental Loan for Student (SLS) loan. If the system finds a record, it authorizes the item type for disbursement. If no prior loan history exists, the student is assumed to be a new borrower, and the **Loan Entrance Interview Status** field on the Packaging Status Summary component is checked for the student's current status. When an item type fails authorization because of the loan entrance counseling requirement, the following messages can appear: *The student is a first time borrower* if the current **Loan Entrance Interview Status** field is blank, or *Loan Interview is required to authorize the loan* if the current **Loan Entrance Interview Status** value is *Inst Req* (Institution Required). To control how this disbursement rule is carried out, use the **Loan Entrance Interview Status** field on the Packaging Status Summary page. Setting this field to *Complete* or *Pending Resolution* allows the disbursement to pass this requirement. You can select this check box only for Direct Loan and FFEL financial aid item types. See Understanding Loan Counseling.
Awd Career Match Term Career (award career matches term career)	Select this check box to prevent disbursement if the career used when making the award is not the career that is in Financial Aid Term data.
Hold Disb Fed Overaward (hold disbursement federal overaward)	Select this check box to prevent disbursement of this financial aid item type if a federal overaward exists.
Hold Disb Inst Overaward (hold disbursement institutional overaward)	Select this check box to prevent disbursement of this financial aid item type if an institutional overaward exists.

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Field or Control	Description
Authorize to Fee Assessment	Select this check box to require that the disbursed amount for the financial aid item type cannot be greater than the balance on the student's account for the term. If selected, the amount disbursed for the financial aid item type is not greater than the balance on the student's account. For this feature to work, you must set up the predelivered item grouping named "FA-BUDGET" in Student Financials. Item groupings are set up on the Item Groupings component **(Set Up SACR**, and then **Product Related**, and then **Student Financials**, and then **Item Types**, and then **Item Type Group).** You must assign the appropriate item tree and tree nodes that contain the charge item types that you want the rule to count. See Student Financials: Setting Up Item Types and Item Type Groups.
FFELP Tolerance Amt (Federal Family Educational Loan Program tolerance amount)	Enter the acceptable difference between the authorized amount and the net disbursement amount for the financial aid item type. If the authorized amount is greater than the net disbursed amount, the system calculates the difference. If this difference is greater than the FFELP tolerance amount, the system displays an error during disbursement authorization. If you leave this field at the default setting (zero), the loan disbursement amount must match the net disbursement amount from the student's package. Generally, you should set this field to a large value (such as 1,000.00 USD) if FFELP loan increases are common. The authorization process never authorizes an amount greater than the amount of any loan check. In addition, disbursements for loans processed electronically using CommonLine are updated to match the approved disbursement amounts from the lender if an electronic guarantee is received and processed by the school.
Review Complete, Package Complete, Post Disb Reduction Control (post disbursement reduction control), **Post Disb Red Ctrl - Census Dt** (post disbursement reduction control – census date), **Hold If Withdrawn, Honor Disbursement Hold, Must Meet Satisfactory Prog** (must meet satisfactory progress), **Hold If No Enrollment Data, Match Fees, Verification Complete,** and **Tolerance Amt** (tolerance amount)	The descriptions for these fields are the same as for the fields on the Disbursement Rules: Global - Indicators page. See Defining Basic Global Rules for Authorization.

Load Level Rules

Select whether the three enrollment load-dependent fields in this group box use the default FA Load enrollment load or the student's current load. Both values can be viewed on the student's Financial Aid Term record.

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Field or Control	Description
Bdgt/Term Load Match (budget/term load match)	Select this check box to require that the academic load in the budget term table match the student's Financial Aid Term FA Load enrollment load information. You can also use the current load from the student's Financial Aid Term record.
Disbursement Proration Rule	Select a disbursement proration rule if awards of this financial aid item type should be prorated based upon the student's Financial Aid Term FA Load value. This rule is used to disburse fractional award amounts to students based on fractional academic loads. For example, a student who is enrolled three-quarters time would receive only 75 percent of the scheduled disbursement amount. These rules are set up on the Disbursement Proration Rules page. You can also use the current load from the student's Financial Aid Term record.

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Field or Control	Description
Stop After Census	Appears only when you select a value in the **Disbursement Proration Rule** field. Select this check box to prevent the disbursement proration rule from taking effect for this financial aid item type after your institution's census date for the term. The disbursement authorization process uses the same census date as the Financial Aid Term build process. The Census Date Locking page, accessed from the FA Term page, displays the census date used. The proration of disbursements typically occurs during the add and drop period before the census date of the term. After that point, depending on your business processes, your institution repackages all prorated awards based on the census date enrollment. After this repackaging has been completed, institutions typically disable the proration rule for the term. This process is repeated each term. This check box enables you to control the proration of financial aid item types per term without having to change the disbursement proration rule settings each term. For example, assume that an item type's proration rule indicates that the student should receive 50 percent of the disbursement if enrolled half-time. You select the **Stop After Census** check box for this item type and the census date is October 15, 2007. If you authorize an award of this item type for a student enrolled half-time on October 14, 2007, the Packaging routine prorates the award. If you authorize the same award on October 16, 2007, the Packaging routine authorizes the entire award, not just the 50 percent that results from proration. If you do not repackage all of your prorated awards before the stop after census feature goes into effect, you risk reauthorizing prorated awards for the maximum amount for the term. You might want to stop running batch authorization for these financial aid item types until you have completed repackaging the prorated awards. You can use the new batch authorization page functionality to accomplish this.
Awd/Term Load Match (award/term load match)	Select this check box to require that the academic load used by the award match the Financial Aid Term FA Load value. You can also use the current load from the student's Financial Aid Term record.

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Field or Control	Description
Use Current Load	The academic load used for awarding can match the Financial Aid Term current load value instead of the Financial Aid Term FA Load value. If you select a value in this field, the **Bdgt/Term Load Match, Disbursement Proration,** and **Awd/Term Load Match** rules all use the selected value. Values are: *(blank):* Use Financial Aid Term academic load information. *All Stdnts* (all students): Use Financial Aid Term current load information for all students with this financial aid item type. *OEE Only:* Use Financial Aid Term current load information for only open entry and open exit students with this financial aid item type.

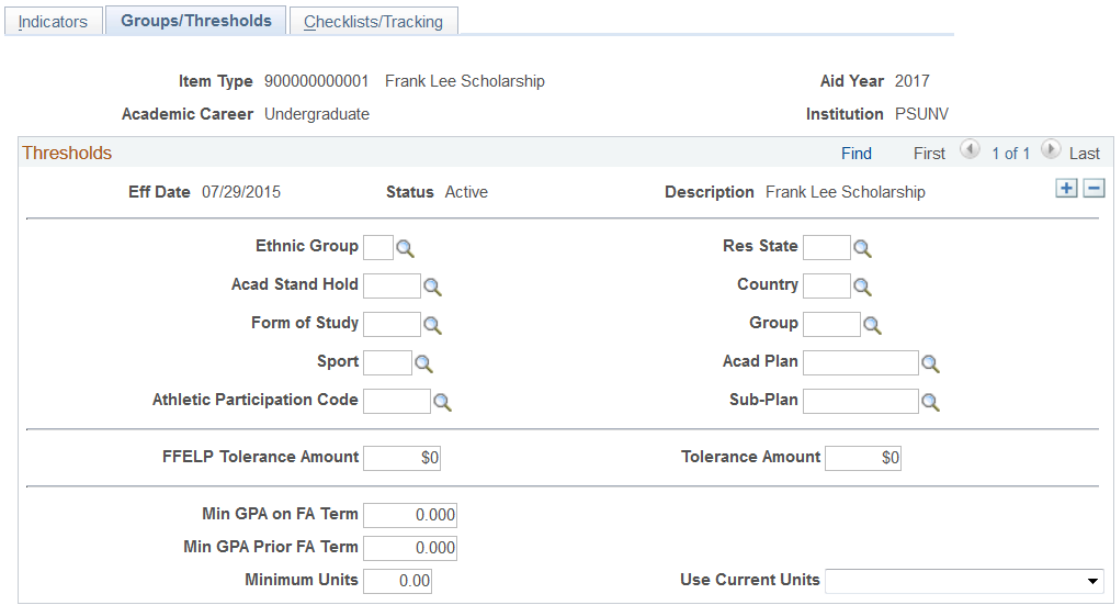
Related Topics

- Reviewing the Packaging Status Summary Page
  Access the Packaging Status Summary page (**Financial Aid**, and then **View Packaging Status Summary**, and then **Packaging Status Summary**).

Defining Additional Restrictions

Access the Groups/Thresholds page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Type Rules**, and then **Groups/Thresholds**).

This example illustrates the fields and controls on the Groups/Thresholds page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Ethnic Group	Select a value if the student must be a member of an ethnic group to receive this financial aid item type.
Res State (residence state)	Select the country code in the field. The system then displays the state field. Then select a state of residence to limit disbursement of the item type to a student with a specific state or province of residence, such as Arizona or Nova Scotia. For the **Res State** field, the system collects the country code along with the state code when establishing this rule. Additionally, the authorization program uses the country code when selecting information from the residency tables. This enables the rule to continue to function for global clients. The disbursement authorization process continues to use official residency information in its evaluation, but uses self-reported residency information if no official information exists. The process also considers effective dates and active term residency information.
Acad Stand Hold (academic standing hold)	Select a value if a student must have a certain academic standing to receive disbursement of the financial aid item type. For example, you could use this to prevent students on academic probation from receiving a merit-based award. Academic standing codes are indicated on the Financial Aid Term pages.
Country	Select a value to limit disbursement to a student from a specific country.
Form of Study	Select a form of study to allow disbursement only to students who are *Study Abroad,* have *Advanced to Candidacy* (for a Ph.D. program for example), have a *Class Enrollment,* or are in a *Detached Study* program. The authorization process checks the student's form of study on Financial Aid Term.
Group	Select a student group to allow disbursement of the financial aid item type only to students who are a member of a the selected group, such as first generation college students, athletes of all sports, or veterans. You define student groups in Student Records.
Sport	Select a sport if this financial aid item type can be disbursed only to a student participating in a particular sport.
Acad Plan (academic plan)	Select an academic plan to limit disbursement of the financial aid item type to students with a particular academic plan, such as chemistry or art.

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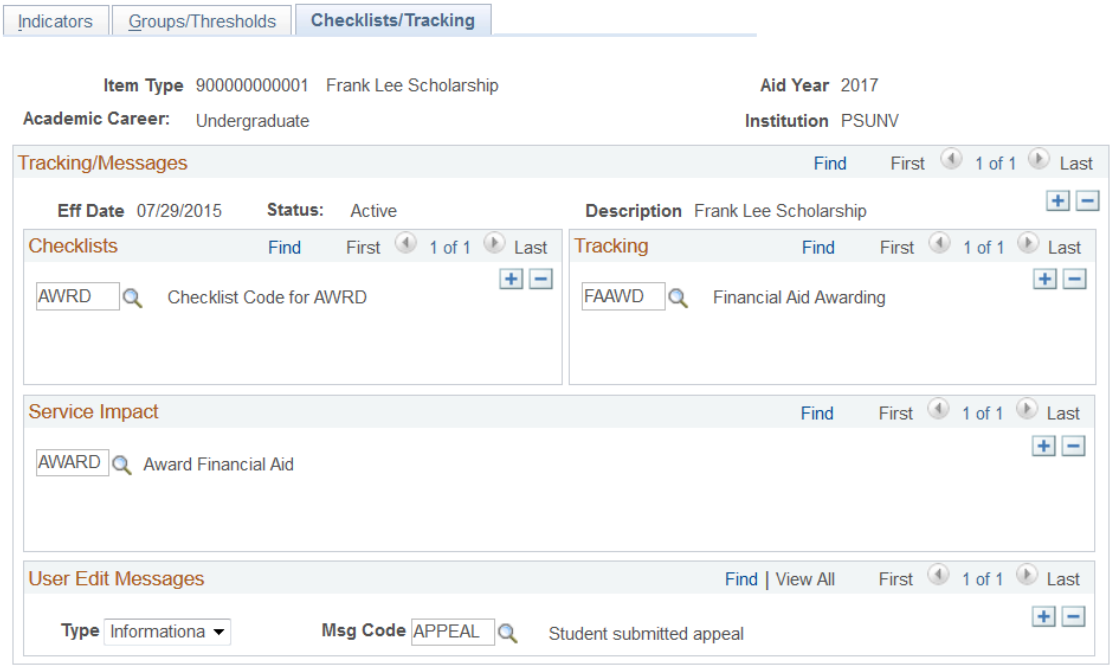
Field or Control	Description
Ath Par Cd (athletic participation code)	Select an athletic participation code to further define the type of sport participation required for disbursement. You can choose *Active Participant, Manager, Not Recruited,*or *Recruited.* The athletic participation code applies to the selected sport.
Sub-Plan	Select a subplan to limit disbursement of the financial aid item type to students with a particular academic subplan. The authorization process checks academic plan and subplan information from Financial Aid Term. You define academic plans and subplans in Student Records.
Min GPA on FA Term (minimum GPA on Financial Aid Term)	Enter the minimum GPA that a student must have for disbursement of this financial aid item type. The authorization process verifies the cumulative GPA on the current Financial Aid Term.
Min GPA Prior FA Term (minimum GPA on prior Financial Aid Term)	Enter the minimum GPA that a student must have on a prior Financial Aid Term for disbursement of this financial aid item type. Authorization reviews the cumulative GPA on the prior Financial Aid Term within the aid year. For example, if you want the system to check the fall term's minimum GPA before disbursing this financial aid item type for the spring term, you would enter the minimum fall term GPA here. You cannot use this feature if you want to check spring term's GPA for the following fall term's disbursement if the fall term is in a different aid year.
Minimum Units	Enter the minimum number of units for which a student must be registered before this financial aid item type can be disbursed.
Use Current Units	Enter the number of current units, instead of the FA Units from the student's Financial Aid Term record, to determine whether the student meets the minimum units requirement. Values are: *(blank):* Use FA Units information. *All Stdnts* (all students): Use current unit information for all students with this financial aid item type. *OEE Only:* Use current unit information for only open entry and open exit students with this financial aid item type.

Assigning Checklists, Tracking Groups, Service Indicators, and User Edit Messages

Access the Checklists/Tracking page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Item Type Rules**, and then **Checklists/Tracking**).

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This example illustrates the fields and controls on the Checklists/Tracking page. You can find definitions for the fields and controls later on this page.



Checklists

Enter the checklists that must be completed before awards of this financial aid item type are authorized. If a checklist has been assigned to a student and it is not complete, the item type is not disbursed. Checklists can include multiple items that need to be completed or verified. To enter additional checklists, add a new row.

Tracking

Enter the tracking groups that must be completed before awards of this financial aid item type are authorized. To enter additional tracking groups add a new row.

Service Impact

Select any service impacts that you want the financial aid item type disbursement rule to honor. If a student with an award of this financial aid item type has any service indicators with a matching service impact, the authorization process does not authorize that award.

User Edit Messages

User edit messages are special handling instructions that you define for your students. Enter messages whose presence on a student's record should hold disbursement. If a student with this career has one of the user edit messages entered in this group box, the authorization process does not authorize that student's awards.

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Field or Control	Description
Type	Indicates the type of user edit message that you want to associate with the global disbursement rule. You can only select user edit messages of this type in the **Msg Code** (message code) field. Insert additional rows to enter additional user edit message types and message codes.
Msg Code (message code)	Enter the message code of the user edit message that causes disbursement to be held.

Setting Up Authorization and Disbursement Calendars

To set up authorization and disbursement calendars, use the Set Up Disbursement Calendars component (AUTH_CALENDER).

This section discusses how to:

- Define the authorization calendar.
- Define the disbursement calendar.

Pages Used to Set Up Authorization and Disbursement Calendars

Page Name	Definition Name	Navigation	Usage
Authorization Calendar	AUTH_CALENDER	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Set Up Disbursement Calendars**, and then **Authorization Calendar**	Define the authorization calendar by selecting which careers, and which terms for each career, can be authorized for disbursement in batch.
Disbursement Calendar	DISB_CALENDER	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Set Up Disbursement Calendars**, and then **Disbursement Calendar**	Define the disbursement calendar by selecting which awards should be disbursed and the disbursement date cutoff.

Defining the Authorization Calendar

Access the Authorization Calendar page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Set Up Disbursement Calendars**, and then **Authorization Calendar**).

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

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Field or Control	Description
Career	Select a career that you want to be included in background authorization. Insert rows to list additional careers or combinations of career and term.
Term	Select a term to include in background authorization for the selected career. This field works in conjunction with the **Disbursement Date** field on the Disbursement ID Table page to determine the disbursement IDs that are displayed on the Disbursement Calendar page.
Reauthorize All Aid	Select to indicate that the system can run a student's aid authorization against the disbursement rules multiple times to ensure that the system is using the most current information to disburse awards. Currently, disbursement authorization processes an award as long as the award has not been disbursed. The authorization process determines that the award has been disbursed when the disbursement net amount equals the amount previously authorized. If an award has been previously authorized, it is not reauthorized unless the award amount is changed or this check box is selected. Your institution might want to run the authorization process with this option active until it is time to disburse awards to the student's account.

Note

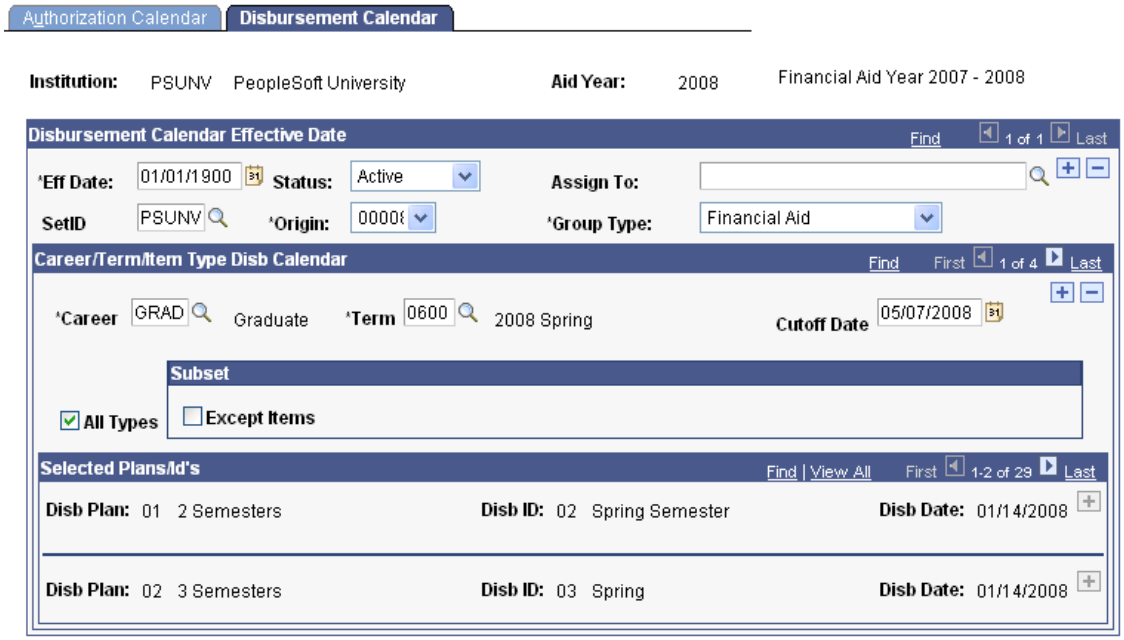
Awards that have been completely disbursed are never reauthorized.

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Defining the Disbursement Calendar

Access the Disbursement Calendar page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Set Up Disbursement Calendars**, and then **Disbursement Calendar**).

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



Depending on your needs, you can set up various disbursement calendars with different effective dates and different subsets of awards to be disbursed. You can set up a disbursement calendar for each term for which you want to disburse aid in the aid year. You can set up disbursement calendars with future effective dates for your second, third, and subsequent terms. Conversely, you can also define all of your terms in the same calendar with the same effective date, but control the terms and financial aid item types to be processed using the batch run control parameters.

Disbursement Calendar Effective Date

Field or Control	Description
Assign To	Select the ID of the administrator that the background disbursement process assigns to all group post transactions created in Student Financials. The record and field PS_GROUP_CONT_INFO.ASSN_OPRID is updated in Student Financials. All financial aid funds processed in batch are assigned this ID. You can view this assigned ID in the various Group Post-related components.

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Field or Control	Description
SetID	Select a set ID for this disbursement calendar. The set ID, in this case, indicates which accounts in the Student Financials system to credit when disbursements occur.
Origin	Student Financials considers financial aid monies a *receivable.* Select the source of receivables; for financial aid monies, you usually specify the financial aid office as the origin. Identifying each background disbursement group by origin and type of group helps to manage the flow of receivables. You set up origins in Student Financials.
Group Type	Group types classify disbursements for Student Financials so that the system knows what type of receivable the disbursement should be. For example, you might use *Financial Aid Disbursements* as the group type. The values in this field depend on the group types that you define in Student Financials.

Career/Term/Item Type Disb Calendar

Field or Control	Description
Career	Select a career that you want to be included in background disbursement. Insert rows to list additional careers or combinations of career and term. You can enter as many combinations of career and term as you need to define your disbursement calendar. The background disbursement process only disburses for the careers and terms that you designate here.
Term	Select a term to include in background disbursement for the selected career.
Cutoff Date	Enter a cutoff date for the associated career and term. When the batch disbursement process runs, it selects only financial aid item types for the associated career and term that have a disbursement date that is equal to or before the defined cutoff date. You set up disbursement dates on the Disbursement ID page when you assign disbursement IDs to packaging plans.
All Types	For each combination of career and term, you can control which item types are included during the background disbursement process. Select this check box to include all financial aid item types in the background disbursement process. This check box is selected by default.

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Subset

Field or Control	Description
Except Items	If you select the **All Types** check box, this field becomes available. Select to exclude some financial aid item types from the background disbursement process. Use the **From** and **To** fields to enter a range of financial aid item type IDs to exclude.
Only Include Items	If you clear the **All Types** check box, this field becomes available. Select to indicate a range of financial aid item types that should be included in the background disbursement process.
From and To	Enter the first and last financial aid item types to be included or excluded from the background disbursement process. These financial aid item types and any financial aid item types within that numbering sequence are included or excluded from the background disbursement.

Selected Plan/IDs

Displays disbursement plans and their associated disbursements that meet the disbursement calendar settings you enter in the previous group boxes.

Field or Control	Description
Disb Plan (disbursement plan)	Displays disbursement plans for the career/term combination used as part of the background disbursement process. The cutoff date determines which disbursement plans and disbursement IDs are displayed. Only awards that have the same disbursement plans as those listed in this group box are disbursed when background disbursement is run.
Disb ID (disbursement ID)	Displays disbursement IDs for the selected disbursement plan that fall within the selected term. The cutoff date determines which disbursement IDs are displayed in this group box. Only the portion of an award that matches the displayed disbursement IDs is disbursed when background disbursement is run.
Disb Date (disbursement date)	Displays disbursement dates associated with each disbursement ID.

> **Note**
>
> The disbursement ID for a combination of disbursement plan and disbursement ID must be earlier or equal to the cutoff date for the disbursement plan and disbursement ID combination to be listed in the **Selected Plan/IDs** group box. The following table illustrates the selection process.

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Examples

Example Cutoff Date	Example Disbursement Dates	Disbursement Plan Selected
June 6, 2004	January 8, 2004 May 30, 2004 June 1, 2004	All disbursement plans and disbursement IDs with the example disbursement dates are selected, because the disbursement dates are earlier or equal to the cutoff date.
January 7, 2004	January 8, 2004 May 30, 2004 June 1, 2004	None of the disbursement plans and disbursement IDs with the example disbursement dates are selected. The disbursement dates are after the cutoff date.
January 8, 2004	January 8, 2004 May 30, 2004 June 1, 2004	Only disbursement plans and disbursement IDs with the disbursement date of January 8, 2004 are selected because the disbursement date is equal to the cutoff date. All others are not selected because they are after the cutoff date.

Related Topics

- Campus Solutions Application Fundamentals: Tableset Sharing

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16

(GBR) Setting Up Student Loans Company

Understanding SLC

The SLC administers government-funded loans and grants to students by working with approximately 200 local education (award) authorities, including:

- Local Authorities in England and Wales (LEAs)
- Student Awards Agency for Scotland
- Education and Library boards in Northern Ireland
- HM Revenue & Customs
- 700+ HEIs

HEI students apply for student support annually. Depending on where they live, they apply through their LEAs or directly to the SLC. Application files are available to the HEI in August just before the beginning of each academic year.

The SLC also administers maintenance payments to students and, optionally, bursaries and scholarships on behalf of the HEIs.

Prerequisites

Before setting up SLC, you must set up your academic institution and aid year.

You must also understand how checklists, communication, financial aid packaging, and disbursement work.

See Establishing Aid Years.

See Campus Solutions Application Fundamentals: Defining Academic Institutions.

Setting Up SLC Processing

This section discusses how to:

- Define SLC options.
- Define search match options.
- Complete prerequisites for SLC FTE calculation.

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Pages Used to Set Up SLC Processing

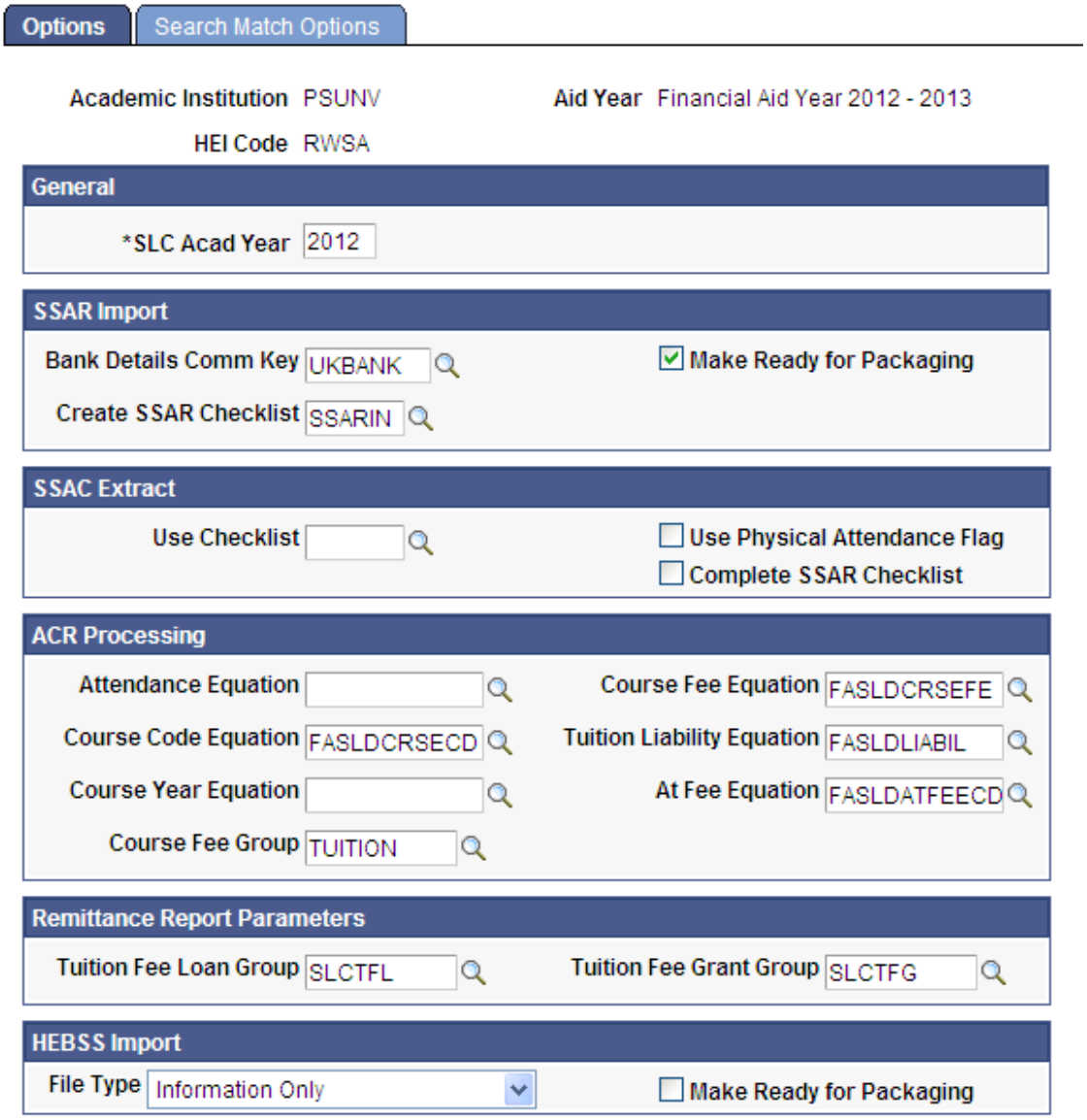
Page Name	Definition Name	Navigation	Usage
Student Loans Company Setup - Options	SFA_SLC_SETUP	**Financial Aid**, and then **Student Loans Company**, and then **Student Loans Company Setup**, and then **Options**	Define SLC options.
Student Loans Company Setup - Search Match Options	SFA_SLC_SRCH_MATCH	**Financial Aid**, and then **Student Loans Company**, and then **Student Loans Company Setup**, and then **Search Match Options**	Define search match options.

Defining SLC Options

Access the Student Loans Company Setup - Options page (**Financial Aid**, and then **Student Loans Company**, and then **Student Loans Company Setup**, and then **Options**).

This example illustrates the fields and controls on the Student Loans Company Setup - Options page. You can find definitions for the fields and controls later on this page.

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General

Field or Control	Description
SLC Acad Year (Student Loans Company academic year)	Select the year for which this setup is intended.

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SSAR Import

Field or Control	Description
Bank Details Comm Key (bank details communication key)	Select the communication key to be used when the **Bank Details Held** fields in the Student Support Attendance Requests (SSAR) files being imported have a value of *N*. The communication is created only if the communication designated by the communication key does not already exist for the student.
Create SSAR Checklist (create Student Support Attendance Requests checklist)	Select the checklist to be assigned to students when their SSAR record is imported. This checklist can be used for controlling disbursement of Tuition Fee Grant (TFG) and Tuition Fee Loan (TFL) award disbursements. Disbursement rules can consider a checklist status. The checklist is created only if the designated checklist code does not already exist for the student.
Make Ready for Packaging	Select this check box to update the Packaging status to *Ready for Packaging*. The Packaging status is updated for a student when either of the following is true: • Initial SSAR data is received for the student for this SLC academic year. • A subsequent SSAR file is received for the student for this SLC academic year with a TFL or TFG amount that is different from the amount stored for the student and the student's Packaging status is *Packaging Completed*.

SSAC Extract

Field or Control	Description
Use Checklist	Select the checklist to be used when selecting the students to be included in the Generate SSAC Data process. When evaluating whether the student can be included in the SSAC Extract, the process determines whether the student has this checklist assigned and whether the checklist is complete.
Use Physical Attendance Flag	Select this check box to ensure that the Generate SSAC Data process checks to see if the student's physical attendance is confirmed when evaluating whether the student can be included in the SSAC Extract.
Complete SSAR Checklist (complete Student Support Attendance Requests checklist)	Select this check box to ensure that the Generate SSAC Data process updates the status of the checklist designated in the **Create SSAR Checklist** field to *Complete*.

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ACR Processing

Use this group box to:

- Associate equations with each of the Attendance Confirmation Report (ACR) elements that is used to determine the At Fee Code that is sent in the ACR Response File from the HEI to the SLC.
- Designate a course fee group to be used in the Course Fee element.
- Designate an equation to determine the At Fee Code to be returned for each student with the ACR Response File.

At Fee Codes are defined by the SLC.

When writing equations to be used by the At Fee Evaluation process, ensure that they return values for the same calendar date. These values can be compared with students' ACR data to determine the At Fee Code. The exception is the attendance status, which is determined for the same calendar date as the other equations, but which has no ACR field to use for comparison.

The values that are available in the equation fields in this group box appear by default from the Equation Editor (EQUATION_EDITOR) component **(Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Editor**, and then **Equation Editor).**

If you write equations to be selected in the **Attendance Equation, Course Code Equation, Course Year Equation, Course Fee Equation,** and **Tuition Liability Equation** fields:

- The Attendance Equation must set the value for the **SFA_SLC_EQ_ATTSTAT** field.

  The translate values for **SFA_SLC_EQ_ATTSTAT** are *A - In Attendance, N - Not in Attendance,* and *S - Studies Suspended.*
- The Course Code Equation must return the UCAS or SLC Code for the course (depending on which type of course code was provided on the ACR).
- The Course Year Equation must return the year of the course of study/program in which the student is enrolled; for example, a value such as *1, 2, 3,* or *4.*
- The Course Fee Equation must return the amount of tuition fees charged to the student for this academic year.
- The Tuition Liability Equation should set the following equation engine variables:
  - SFA_SLC_EQ_TUITLN - Tuition Loan Amt
  - SFA_SLC_EQ_TUITGNT - Tuition Grant Amt
  - SFA_SLC_EQ_TUITSTD - Tuition Student Liable Amt

Field or Control	Description
Course Fee Group	Select the fee group to be used by the Course Fee equation. Values appear by default from the Student Financials Item Type Groups (ITEM_GROUPINGS) component **(Set Up SACR**, and then **Product Related**, and then **Student Financials**, and then **Item Types**, and then **Item Type Groups).**

All fields in the **ACR Processing** group box are optional.

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However, to use the ACR At Fee Evaluation process, you must write an equation to be selected in the **At Fee Equation** field.

The At Fee Equation should be coded to populate the Equation Engine variable SFA_SLC_ATTEND_IND.

You can write the At Fee equation so that it uses the results of one or more of the other equations in the **ACR Processing** group box, or you can write an At Fee equation that does not rely on other equation results.

See Running the ACR At Fee Evaluation Process .

Remittance Report Parameters

Use this group box to define which financial aid item type group represents Tuition Fee Grants and which financial aid item type group represents Tuition Fee Loans. This mapping enables you to create or modify a reconciliation query using imported Remittance Report data. The values for these two fields appear by default from the Financial Aid Related Item Type Group (PKG_REL_ITEM_GROUP) component **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Related Item Type Group).**

Field or Control	Description
Tuition Fee Loan Group	Select a financial aid item type group for this tuition fee loan item type.
Tuition Fee Grant Group	Select a financial aid item type group for this tuition fee grant item type.

HEBSS Import

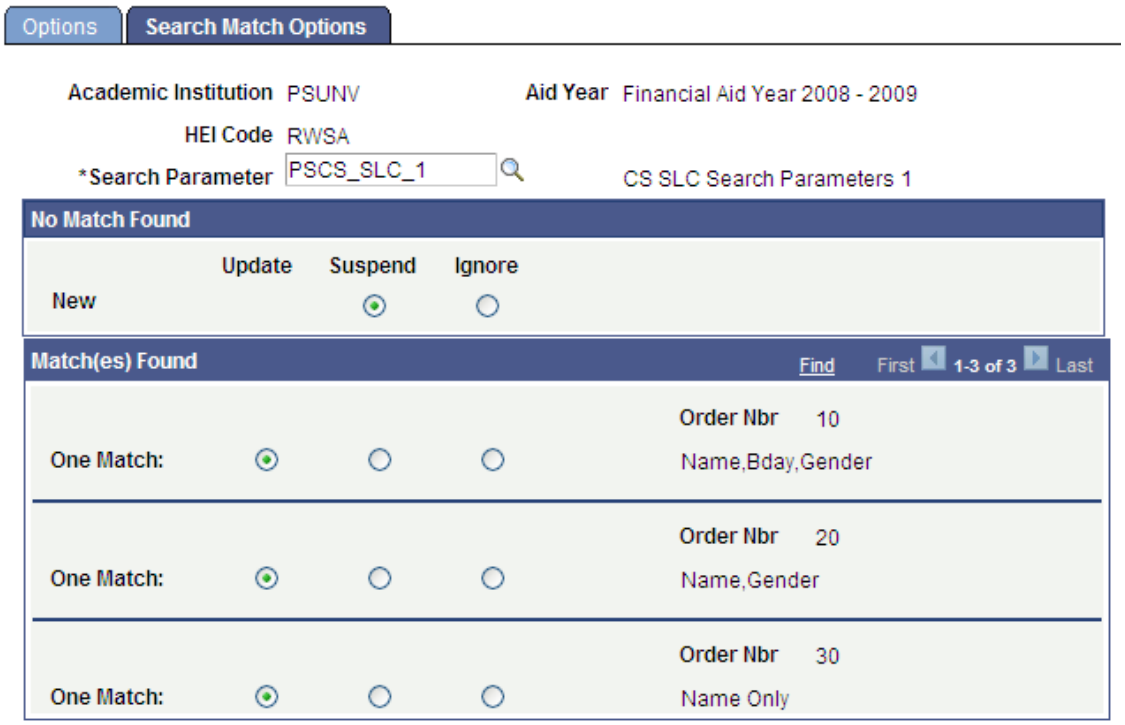
Field or Control	Description
File Type	Select the HEBSS **File Type** you want to import: • Full Administration – Imports all fields. • Information Only – Imports all fields except: Bank Details Supplied, Automated Award Total, Manual Award Total, Overall Award Total, and Previously Approved.
Make Ready for Packaging	Select this check box to update the packaging status to *Ready for Packaging.* The Packaging status is updated for a student when either of the following is true: • Initial Higher Education Bursaries and Scholarships Scheme (HEBSS) data is received for the student for this SLC academic year. • A subsequent HEBSS file is received for the student for this SLC academic year and the student's Packaging status is *Packaging Completed.*

Defining Search Match Options

Access the Student Loans Company Setup - Search Match Options page (**Financial Aid**, and then **Student Loans Company**, and then **Student Loans Company Setup**, and then **Search Match Options**).

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This example illustrates the fields and controls on the Student Loans Company Setup - Search Match Options page.



Use this page to select the search parameters that you want to use for the Import SSAR Files process, the Import HEBSS Files process, and the Import ACR/SISF process, and the subsequent actions to be taken for the different match scenarios.

> **Note**
>
> Students for whom an exact Student Support Number match exists have their records directly added to the Student SLC table and are not be subject to the Search/Match options defined on this page.

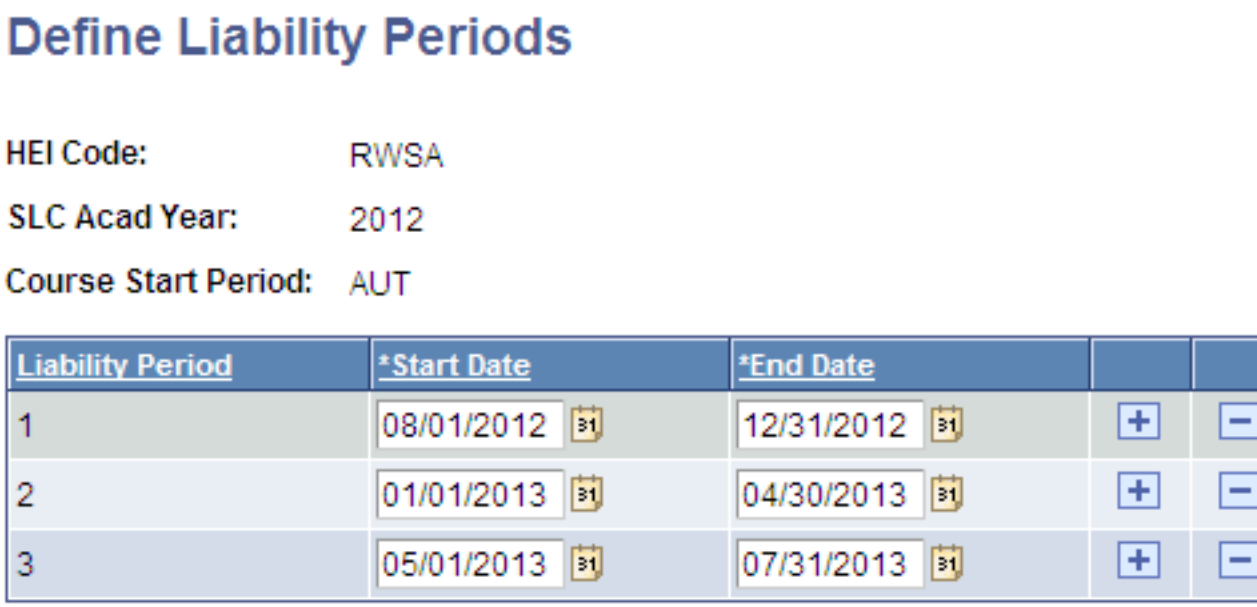
Defining Liability Periods

The section describes how to define Liability Periods for unique combinations of HEI, Academic Year, and Course Start Periods for determining student liability for full tuition fee loans.

Access the Define Liability Periods page (**Financial Aid**, and then **Student Loans Company**, and then **Student Loans Company Setup**, and then **Define Liability Periods**).

This example illustrates the fields and controls on the Define Liability Periods page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Liability Period	Select the Liability Period for the context Course Start Period.
Start Date and**End Date**	Enter the Liability Period Start and End Dates. Liability Period Dates cannot overlap.

Completing Prerequisites for SLC FTE Calculation

This section discusses the Campus Solution Student Records and Enrollment HESA (Higher Education Statistics Agency) setup required to use the SLC FTE Calculation.

1. Set up HESA in SACR Student Administration and Foundation Institution pages.

   Access the SA Features page (**Set Up SACR**, and then **Install**, and then **Student Admin Installation**, and then **SA Features tab**).

   In the **United Kingdom** group box, check the *HESA, UCAS* check box.

   See Campus Solutions Application Fundamentals: Selecting Country-Specific Features and Enabling CRM for Higher Education Feature.

   Access the Academic Institution 6 page (**Set Up SACR**, and then **Foundation Tables**, and then **Academic Structure**, and then **Academic Institution Table**, and then **Academic Institution 6 tab**).

   In the **United Kingdom** group box, check the *HESA, UCAS* check box.

   See Campus Solutions Application Fundamentals: (AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features.

2. Ensure that the **Reporting Period** you want to use is defined and is *Active*.

   Access the Reporting Periods page (**Records and Enrollment**, and then **HESA Reporting**, and then **HESA Returns Setup**, and then **Reporting Periods**)

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3. Set up the HESA Configuration page for the Institution. If you are using an **FTE Calculation Type** of *Derive load from Modules*, then the **Grading Basis Inclusion** defined on this page needs to include the appropriate **Grading Basis** with the **FTE** check box selected.

   Access the HESA Configuration page (**Records and Enrollment**, and then **HESA Reporting**, and then **HESA Returns Setup**, and then **HESA Configuration**).

   See Student Records: Configuring HESA.

4. Run the Create Instance for the Academic Institution or Program or the individual students for whom an ACR will be processed.

   Access the Create HESA Instance page (**Records and Enrollment**, and then **HESA Reporting**, and then **HESA Returns Setup**, and then **Create Instance**).

   See Student Records: Creating HESA Instance and Person HESA Data Records for Students.

   Access the HESA Instance Data page to view or create an Instance record for an individual student. (**Records and Enrollment**, and then **Career and Program Information**, and then **HESA Instance Details**).

   See Student Records: Entering HESA Instance Data for a Student.

5. Run the Create Module process for the **Academic Institution** and **Reporting Period** for the course enrollments.

   Access the Create HESA Module Data page (**Records and Enrollment**, and then **HESA Reporting**, and then **HESA Returns Setup**, and then **Create Module**).

   See Student Records: Creating HESA Modules.

   The Run the Create Module process creates HESA Module detail in Curriculum Management. You can also create a single course or set of courses individually under the Curriculum Management. These would be the courses that the student is enrolled in during the reporting period. Make sure effective dates are before the reporting period and the **Report to HESA Flag** is selected. This information is used if the FTE process is run as *Derive load from Modules*. If using the *Derive load from Modules*, define the **Module FTE** value in the **Module Data** region.

   See Student Records: Entering HESA Data for a Module.

6. For the Programs and Plans that students are enrolled in, set up the **FTE Calculation Type** to derive from Program or Modules; depending on which basis you are using for the FTE process. If using the **FTE Calculation Type** of *Derive load from Program*, define the **FTE Load** value. On the Plan HESA Data page, select the **Report to HESA** flag.

   Access the Program HESA Data page (**Set Up SACR**, and then **Foundation Tables**, and then **Academic Structure**, and then **Academic Program Table**, and then **Program HESA Data tab**).

   See Student Records: Entering HESA Data for an Academic Program.

   Access the Plan HESA Data page (**Set Up SACR**, and then **Foundation Tables**, and then **Academic Structure**, and then **Academic Plan Table**, and then **Plan HESA Data tab**).

   See Student Records: Entering HESA Data for an Academic Plan.

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Related Topics

- Running the Calculate FTE Process
  This section provides an overview of the Calculate FTE process for SLC.

Completing Prerequisites for Reporting Part-time and Full-time Academic Loads

This section discusses the Campus Solution Student Records and Enrollment HESA (Higher Education Statistics Agency) setup required to report Academic Load for ACR Export files.

Access the Mode of Study page (**Records and Enrollments**, and then **HESA Reporting**, and then **Codes and Mapping**, and then **Code Mappings**, and then **Mode of Study**).

- Students with **Academic Load**s that *are not* mapped to a **HESA Mode of Study** value of *01*, *02*, *23*, *24* or *25* are considered part-time.
- Students**Academic Load**s that *are* mapped to a **HESA Mode of Study** value of *01*, *02*, *23*, *24* or *25* are considered full-time.

The Mode of Study value can then be defined for the student at the Instance HESA Data, Sub-Plan Offering Year HESA Data, Plan Offering Year HESA Data or Program Offering Year HESA Data level.

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17

Setting Up Return of Title IV Funds

Understanding Return of Title IV Funds

Under the higher education amendment regulation called Return of Title IV Funds (RTIVF), all students receiving Title IV federal grant or loan assistance who withdraw from the institution in the first 60 percent of the term are subject to the RTIVF policy. This regulation affects the calculation of aid to be returned as well as repayment procedures. The percentage of aid earned by a Title IV student is determined by calculating the percentage of the period that the student completed. If the student completes up to 60 percent of the term, then the percentage of aid earned equals the percentage of the completed period. If the student completes 60.01 percent or more, then the student earns 100 percent of aid. The amount of Federal Title IV aid that students must return when they withdraw from school is no longer associated with the refund policy of an institution. Refund policy and return of funds procedures are independent of one another. Refund policy is defined by your institution, whereas Return of Title IV Fund is defined by law.

Common Elements Used in Setting Up Return of Title IV Funds

Field or Control	Description
Academic Institution	A university or college.
Aid Year	An awarding cycle with defined disbursement periods.

Defining Title IV Funds Item Types

To set up Title IV funds item types, use the Define Rules for Return component (RTRN_TIV_FND_SETUP).

This section discusses how to define the financial aid item types used for RTIVF calculations.

Page Used to Define Item Types for RTIVF

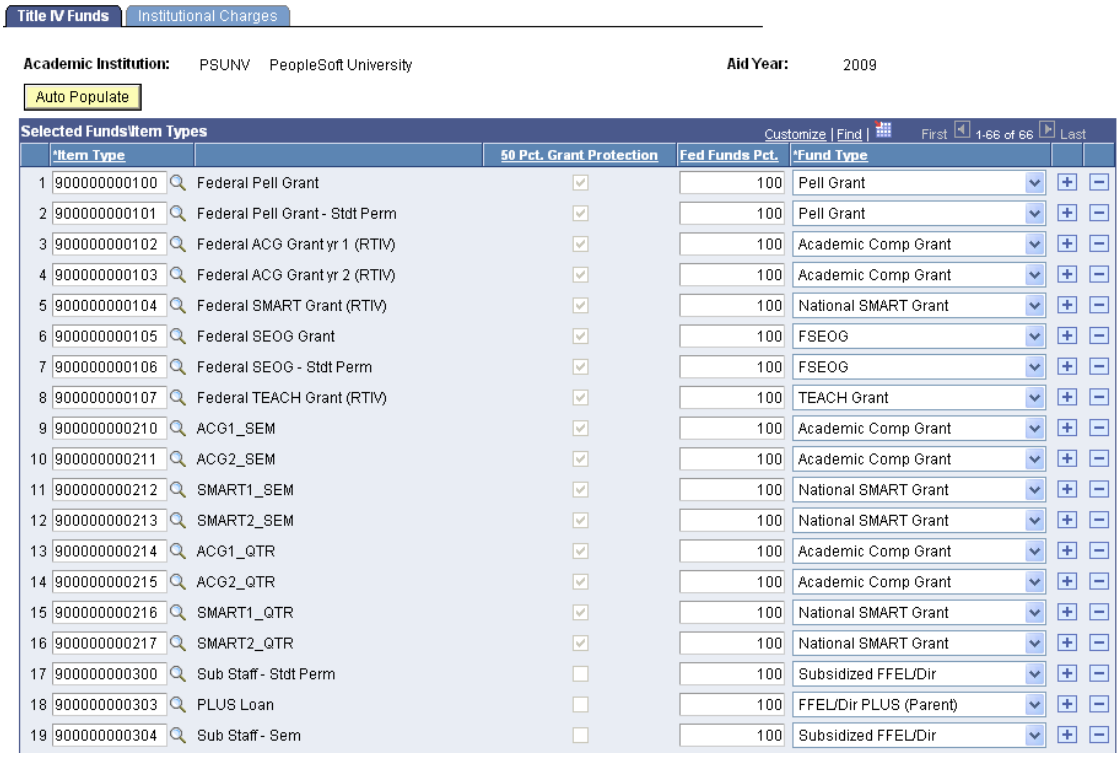
Page Name	Definition Name	Navigation	Usage
Title IV Funds	RTRN_TIV_FND_SETUP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Define Rules for Return**, and then **Return of TIV Aid Rules**, and then **Title IV Funds**	Define Title IV funds financial aid item types for return of funds calculation.

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Defining Title IV Funds Financial Aid Item Types

Access the Title IV Funds page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Define Rules for Return**, and then **Return of TIV Aid Rules**, and then **Title IV Funds**).

This example illustrates the fields and controls on the Title IV Funds page. You can find definitions for the fields and controls later on this page.



Title IV Funds | Institutional Charges

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2009

Auto Populate

Selected Funds\Item Types Customize | Find | First 1-66 of 66 Last

	*Item Type		50 Pct. Grant Protection	Fed Funds Pct.	*Fund Type
1	900000000100	Federal Pell Grant	☑	100	Pell Grant
2	900000000101	Federal Pell Grant - Stdt Perm	☑	100	Pell Grant
3	900000000102	Federal ACG Grant yr 1 (RTIV)	☑	100	Academic Comp Grant
4	900000000103	Federal ACG Grant yr 2 (RTIV)	☑	100	Academic Comp Grant
5	900000000104	Federal SMART Grant (RTIV)	☑	100	National SMART Grant
6	900000000105	Federal SEOG Grant	☑	100	FSEOG
7	900000000106	Federal SEOG - Stdt Perm	☑	100	FSEOG
8	900000000107	Federal TEACH Grant (RTIV)	☑	100	TEACH Grant
9	900000000210	ACG1_SEM	☑	100	Academic Comp Grant
10	900000000211	ACG2_SEM	☑	100	Academic Comp Grant
11	900000000212	SMART1_SEM	☑	100	National SMART Grant
12	900000000213	SMART2_SEM	☑	100	National SMART Grant
13	900000000214	ACG1_QTR	☑	100	Academic Comp Grant
14	900000000215	ACG2_QTR	☑	100	Academic Comp Grant
15	900000000216	SMART1_QTR	☑	100	National SMART Grant
16	900000000217	SMART2_QTR	☑	100	National SMART Grant
17	900000000300	Sub Staff - Stdt Perm	☐	100	Subsidized FFEL/Dir
18	900000000303	PLUS Loan	☐	100	FFEL/Dir PLUS (Parent)
19	900000000304	Sub Staff - Sem	☐	100	Subsidized FFEL/Dir

Field or Control	Description
Item type	Select the item types that your institution has assigned to the funds awarded as financial aid. The system uses the item type to associate the financial aid transaction with the appropriate general ledger account during the general ledger process. The way in which item types are classified determines how they are processed. Only financial aid item types with a source of *Federal* can be selected.
50 Pct. Grant Protection (50 percent grant protection)	The system selects this check box based on the Item Type and Fund Type selected. Funds that are federal grants or are fully funded by federal funds are under the 50 percent rule. This rule reduces the grant amount to be returned by the student by applying an initial 50 percent reduction in the total grant amount to be repaid.

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Field or Control	Description
Fed Funds Pct (federal funds percent)	You can edit this field. The default is 100 percent. Enter the percentage of the fund type funded by federal funds. For example, you might enter *50* for a fund such as SEOG that might be matched 50 percent by state funds and 50 percent by federal funds.
Fund Type	Select the type of Title IV program. Pell Grants, PLUS loans, SEOGs, and subsidized and unsubsidized federal Stafford loans are examples of Title IV funds.
Auto Populate	Click to identify that the aid is defined as part of the Title IV program. The system selects financial aid item types with a source of *Federal*, such as Pell Grant, SEOG, Direct Loan, and PLUS loan and populates the fields on this page.

Defining Institutional Charges

To set up institutional charges, use the Define Rules for Return component (RTRN_TIV_FND_SETUP).

This section discusses how to set up institutional charges.

Page Used to Define Institutional Charges

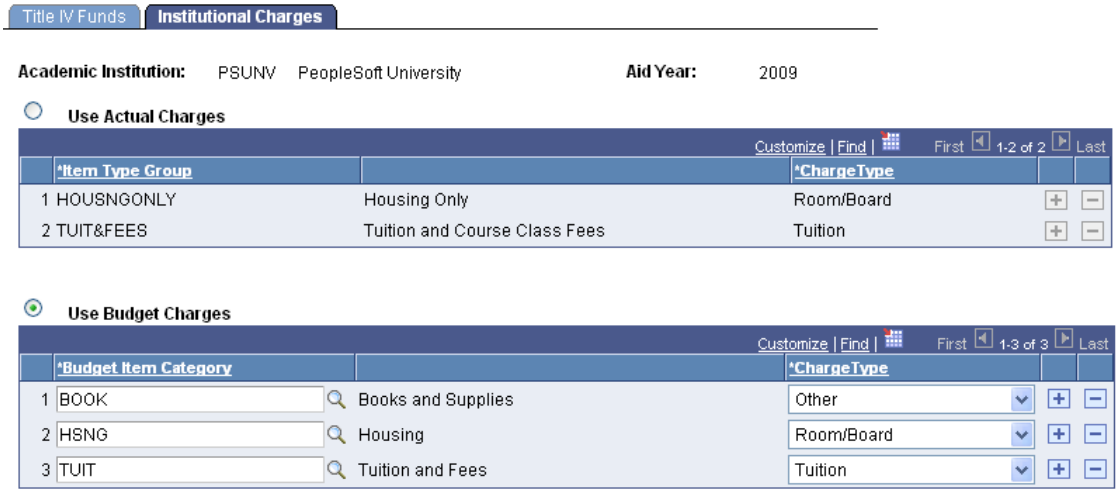
Page Name	Definition Name	Navigation	Usage
Institutional Charges	RTRN_TIV_CHG_SETUP	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Define Rules for Return**, and then **Return of TIV Aid Rules**, and then **Institutional Charges**	Set up institutional charges and the appropriate charge category.

Setting Up Institutional Charges

Access the Institutional Charges page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Define Rules for Return**, and then **Return of TIV Aid Rules**, and then **Institutional Charges**).

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

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Define the charges to be used in the calculation. For example, you can use actual charges, such as tuition and fees, that are charged to the student from Campus Solutions Student Financials or you can use the default budget item values.

Field or Control	Description
Use Actual Charges	Select to use charges calculated in Student Financials.
Item Type Group	For actual charges, enter the item type group. Examples of values are *ENRDEPOSIT* (enrollment deposits), *FINAID* (financial aid), *MYPAYPLANS* (multi-year pay plans), *PAYMENTS*, and *TUITION*.
Charge Type	Enter the type of charge or institutional charge associated with the item type group. Values are *Other*, *Room/Board*, and *Tuition*. This field is required.
Use Budgeted Charges	Select to use charges set up by your institution. The system uses budget items to calculate the student's COA.
Budget Item Category	Enter specific items or components for COA, such as books, supplies, tuition, transportation, housing, and fees.
Charge Type	Enter the type of charge or institutional charges associated with the budget item category. Values are *Other*, *Room/Board*, and *Tuition*. This field is required.

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18

(CAN) Setting Up Canadian Need Analysis

Understanding CNAS

CNAS enables you to set up parameters your institution uses to calculate a student's financial need. You can set various calculation options at the institution, rule set, and student levels. The system allows you to load data files from the provincial Student Services Bureau, which governs the Ontario Student Assistance Plan (OSAP). The Student Services Bureau holds official eligibility data for the Canada Student Loans Program (CSLP), Canada Study Grant Program for Students with Dependents (CSG), and the Ontario Student Loans Plan (OSLP).

Defining CNAS

This section discusses how to:

- Define CNAS rules.
- Review CNAS message tables.
- Define CNAS Options for Tables 1, 2, and 3.
- Define financial parameters for minimum wage.
- Define financial parameters for moderate standard of living (MSOL) setup.
- Define financial parameters for parent MSOL setup.
- Define financial parameters for tuition and fees.
- Define financial parameters for parent weekly Canada student loan (CSL) contribution.
- Define financial parameters for parent weekly Ontario student loan (OSL) contribution.
- Define financial parameters for parent yearly income.
- Define financial parameters for program weekly maximum entitlements.
- Define financial parameters for prestudy tax deductions setup.
- Define financial parameters for study period tax deductions setup.
- Define financial parameters for spouse tax deductions.
- Define financial parameters for parent federal tax deductions.
- Define financial parameters for parent provincial tax deductions.
- Define financial parameters for part-time maximum entitlements.
- Add a full-time or part-time Canadian application.
- Set up cost codes.

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Pages Used to Set Up CNAS

Page Name	Definition Name	Navigation	Usage
CNAS Rule Setup	CNAS_SETUP_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Rule Setup**	Set up options that affect your global and institutional CNAS calculations. The system includes predefined values for CSL and OSL rule sets. You can enter values for additional CNAS rule sets developed by your institution as needed by your business practices.
CNAS Messages	CNAS_MESSAGES	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Messages**	Define or view the messages used by the CNAS calculation.
CNAS Option Tbl 1	CNAS_OPTION_TBL1	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Option Table**, and then **CNAS Option Tbl 1**	Define or view information about your Financial Aid rule sets. You can add options for other rule sets on these pages.
CNAS Option Tbl 2	CNAS_OPTION_TBL2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Option Table 2**, and then **CNAS Option Tbl 2**	Define or view prestudy and study period option information.
CNAS Option Tbl 3	CNAS_OPTION_TBL3	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Option Table 3**, and then **CNAS Option Tbl 3**	Define or view various full-time student, part-time student, or parent options.

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Page Name	Definition Name	Navigation	Usage
Minimum Wage	MIN_WAGE_CSL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Minimum Wage Setup**	Define or view the minimum wage and minimum weekly work hour data for each province.
MSOL Setup	CSL_MSOL_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **MSOL Setup**	Define or view the amounts designated as monthly living allowances for each province.
Parent MSOL Setup	PRT_MSOL_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent MSOL Setup**	Define or view the family size and parent MSOL amounts designated as monthly living allowances for parents in each of the provinces.
Tuition and Fees	BUDGET_CAP_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Tuition and Fees Setup**, and then **Tuition and Fees)**	Define or view the budget cap amounts for non-co-op and co-op programs.
Parent Weekly CSL	PRT_WKLY_CSL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Weekly CSL**	Define or view information about parent income range, base income, and percent of parent annual discretionary income.
Parent Weekly OSL	PRT_WKLY_OSL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Weekly OSL**	Define or view information about parent income range, base income, net income percentage, and percent of parent annual discretionary income based on requirements of the OSL.

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Page Name	Definition Name	Navigation	Usage
Parent Yearly Inc (parent yearly income)	PRT_YEARLY_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Yearly Inc**	Define or view information about family size, contribution limits, and which income formula to use in calculations.
Program Weekly Max (program weekly maximum)	PGM_WKLY_MAX	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Program Weekly Max**	Define or view the maximum entitlement for CSL, CSG, and OSL programs based on student status categories.
Prestudy Tax Setup	STDNT_PS_TX_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Prestudy Tax Setup**	Define or view information about tax deductions from the student's monthly income during the prestudy period.
Study Pd Tax Setup (study period tax setup)	STD_SP_TX_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Study Pd Tax Setup**	Define or view information about tax deductions from the student's monthly income during the study period.
Spouse Tax Setup	SPS_MTHL_TX_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Spouse Tax Setup**	Define or view information about tax deductions from a student's spousal monthly income during the study period.
Parent Fed Tax	PRT_FED_TX_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Fed Tax**	Define or view information about federal tax deductions from the monthly income of the parents of a student during the study period.
Parent Prov Tax (parent provincial tax)	PRT_PROV_TX_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Prov Tax**	Define or view information about the provincial tax deductions from the monthly income of the parents of a student during the study period.

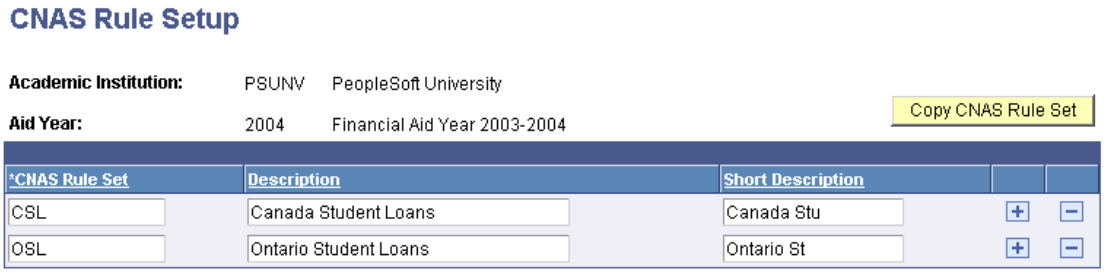
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Page Name	Definition Name	Navigation	Usage
Part-time Max (part-time maximum)	PT_MAX_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Part-time Max**	Define or view the maximum entitlement of part-time students for special opportunity grant (SOG) and part-time CSL loan programs based on family size.
Add Institutional Application	INST_ADD_GBL	**Financial Aid**, and then **Canadian Application Data**, and then **Add Institutional Application**	Define or view the application source code for a full-time or part-time student application.
Cost Code Setup	CAN_COST_CODE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **Cost Code Setup**	Define or view the cost codes for your institution.

Defining CNAS Rules

Access the CNAS Rule Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Rule Setup**).

This example illustrates the fields and controls on the CNAS Rule Setup page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the aid year. The system also displays the rule set for basic CSL and OSL calculations. To create additional rule sets, insert a new row.

Field or Control	Description
CNAS Rule Set	Enter a letter code to identify the CNAS rule set that you create.
Description	Enter a description for the CNAS rule set that you create.
Short Description	Enter a corresponding short description for the CNAS rule set that you create.

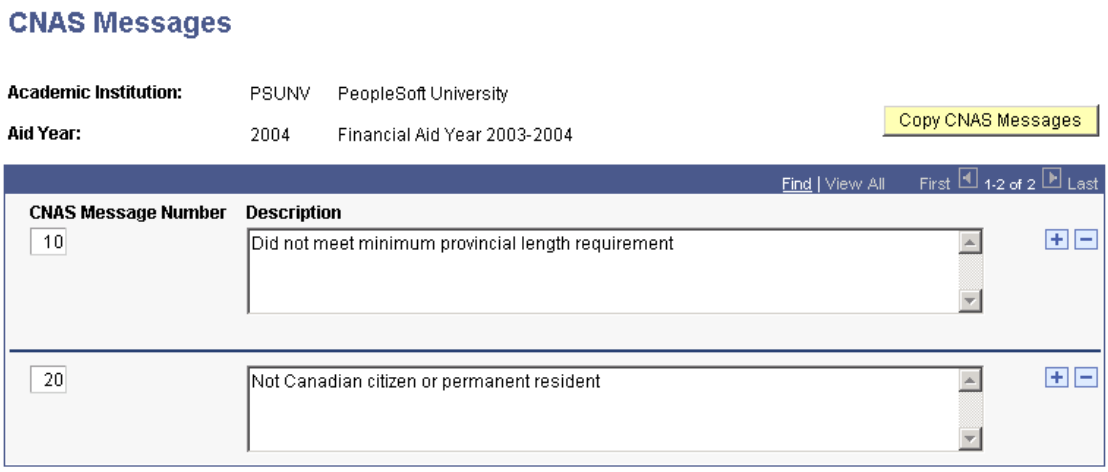
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Click the **CNAS Rule Set** button to copy rule set information to another financial aid year and institution. You must enter the new institution and aid year.

Reviewing CNAS Message Tables

Access the CNAS Messages page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Messages**).

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



The system displays the academic institution and the aid year, as well as the CNAS message number and the message description. You can edit the message descriptions.

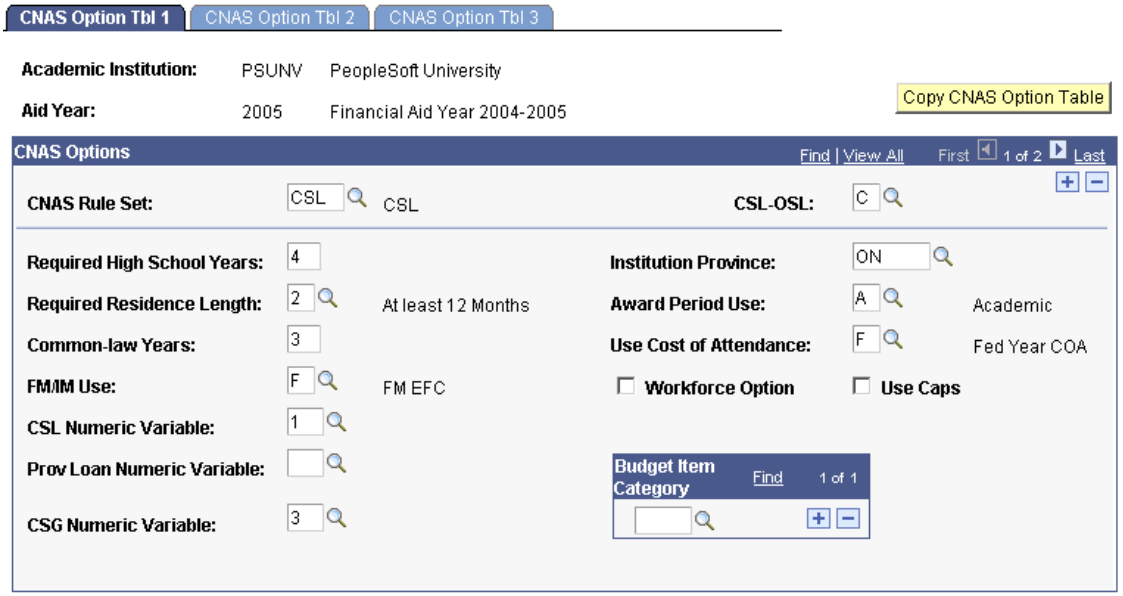
Click the **Copy CNAS Messages** button to copy message information to another financial aid year. You must click the copy button from an existing aid year, and then enter the academic institution and aid year that you want to create.

Defining CNAS Options - Table 1

Access the CNAS Option Tbl 1 (CNAS option table 1) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Option Table**, and then **CNAS Option Tbl 1**).

This example illustrates the fields and controls on the CNAS Option Tbl 1 page. You can find definitions for the fields and controls later on this page.

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The system displays the academic institution and the aid year.

Field or Control	Description
CNAS Rule Set	The system displays the CNAS rule set used for basic calculations. Select a value to determine the type of calculation to perform. Values are: *C – CSL:* Select to invoke Canadian rules for contributions and calculations. *O — OSL:* Select to invoke OSL rules for contributions and calculations.
Required High School Years	Enter the number of years that students are required to be out of high school to be considered independent.
Required Residence Length	Enter translate values that correspond to translate values on the student's application. *1:* Less than 12 months *2:* At least 12 months
Common-law Years	Enter the number of years of a student's common-law marriage that are required for a student to be considered independent.
FM/IM Use	Select a value. *F:* Select to update federal need and family contribution (FC) values with calculation results. *I:* Select to update institutional need and family contribution values with calculation results. *B:* Select to update both federal and institutional values.
CSL Numeric Variable	Select a numeric packaging variable in which to store the CSL amount. If you leave this field blank, the system does not write the value to packaging variables.

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Field or Control	Description
Prov Loan Numeric Variable (provincial loan numeric variable)	Select a numeric packaging variable in which to store the provincial loan amount. If you leave this field blank, the system does not write the value to packaging variables.
CSG Numeric Variable	Select a numeric packaging variable in which to store the CSG amount. If you leave this field blank, the system does not write the value to packaging variables.
Institution Province	Enter the province of your institution.
Award Period Use	Calculation results are populated in the Student Award Period record based on translate values. Select from the following values: *A:* Academic period. *N:* Nonstandard period. *B:* Both academic and nonstandard periods.
Use Cost of Attendance	Select which cost of attendance value is used. Values are: *F:* Fed Year COA (federal year cost of attendance) *I:* Inst Year COA (institutional year cost of attendance)
Workforce Option	Select to specify that students in workforce are considered independent.
Use Caps	Select to use budget caps associated with Additional Cost Recovery programs. This is necessary only if the academic program is not set up as deregulated.
Budget Item Category	Select which budget items to use in the budget cap calculation.

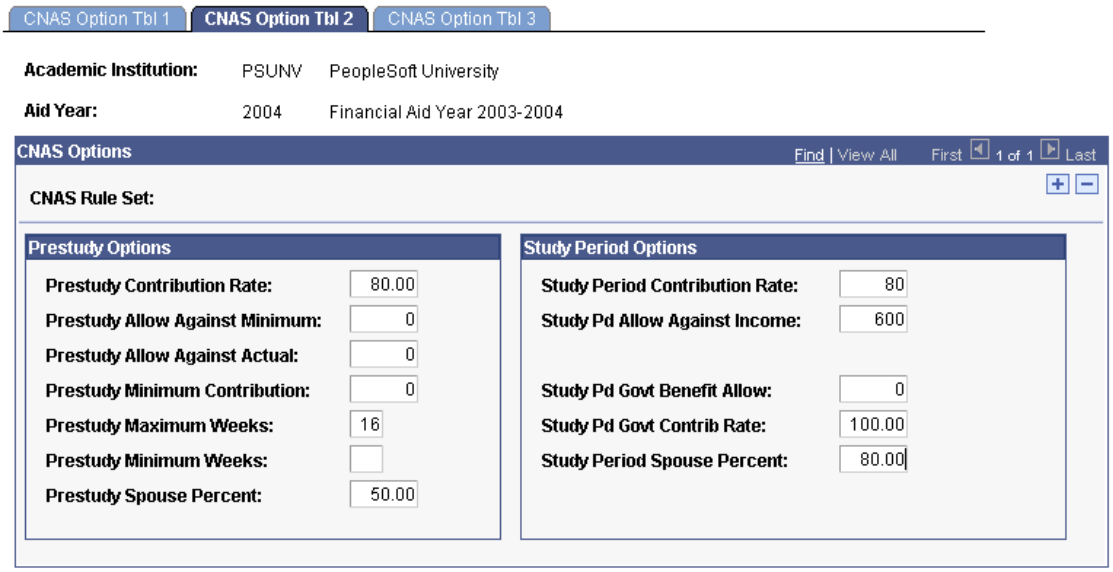
Click the **Copy CNAS Option Table** button from the CNAS Option Table 1 page to copy CNAS Option Table information to another financial aid year. Click the copy button from an existing aid year and then enter the academic institution and aid year that you want to create.

Defining CNAS Options - Table 2

Access the CNAS Option Tbl 2 (CNAS option table 2) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Option Table**, and then **CNAS Option Tbl 2**).

This example illustrates the fields and controls on the CNAS Option Tbl 2 page. You can find definitions for the fields and controls later on this page.

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The student and the student's family are expected to contribute to the costs of post-secondary education. Students from all categories, as well as the spouses of married students, are expected to work during the prestudy period and to contribute to the student's educational costs. Prestudy period income contributions are based on rates and allowances established by Statistics Canada for all of the provinces. The calculation of a student's study period contribution depends on whether the student's program of study is considered deregulated or regulated by the Ministry of Education and Training.

The system displays the academic institution, the aid year, and the CNAS rule set that is selected on the CNAS Option Table 1 page.

Prestudy Options

Field or Control	Description
Prestudy Contribution Rate	Enter the rate used to calculate the expected prestudy contribution from actual income.
Prestudy Allow Against Minimum	Enter a dollar amount used as an allowance against the minimum student contribution.
Prestudy Allow Against Actual	Enter a CAD amount used as an allowance against the actual student contribution calculated.
Prestudy Minimum Contribution	Enter a minimum prestudy student contribution to be enforced when the actual result of the calculation is below minimum.
Prestudy Maximum Weeks	Enter the number of weeks that are considered as the prestudy work period.
Prestudy Minimum Weeks	Enter the minimum number of prestudy weeks required to charge a minimum student contribution.
Prestudy Spouse Percent	Enter the percent of the student's spousal income that is considered in calculating the contribution.

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Study Period Options (CSL Rule Set)

Different fields appear depending on which rule set is selected. Some fields appear for both CSL and OSL.

Field or Control	Description
Study Period Contribution Rate	(CSL only) Enter the rate used to calculate the expected study period contribution from actual income.
Study Pd Allow Against Income (study period allowed against income)	(CSL only) Enter an amount used as an allowance against the actual calculated student contribution.
Study Pd Govt Benefit Allow (study period government benefits allowance)	(Both CSL and OSL) Enter an amount used to reduce the living allowance in the assessment of costs for the student.
Study Pd Govt Contrib Rate (study period government contribution rate)	(Both CSL and OSL) Enter the percent of the student's expected income from government benefits, typically 100 percent.
Study Period Spouse Percent	(CSL only) Enter the percent of the student's spousal income that is considered in calculating the contribution.

Study Period Options (OSL Rule Set)

The following fields appear in the **Study Period Options** group box when the OSL rule set is selected.

Field or Control	Description
Study Pd Allowance - Merit (study period allowance for merit)	Enter the weekly study period allowance used to reduce the contribution from income for students who receive merit scholarships.
Study Pd Allowance - Non-Merit (study period allowance for non-merit)	Enter the weekly study period allowance used to reduce the contribution from income for students who do not receive scholarships.
Study Pd Spouse Pct 1 in Col (study period percentage spouse 1 in college)	Enter the percentage of the student's spousal income that is considered in calculating the contribution if only the student is in college.
Study Pd Spouse Pct 2 in Col (study period percentage spouse 2 in college)	Enter the percentage of the student's spousal income that is considered in calculating the contribution if both the student and the spouse are in college.

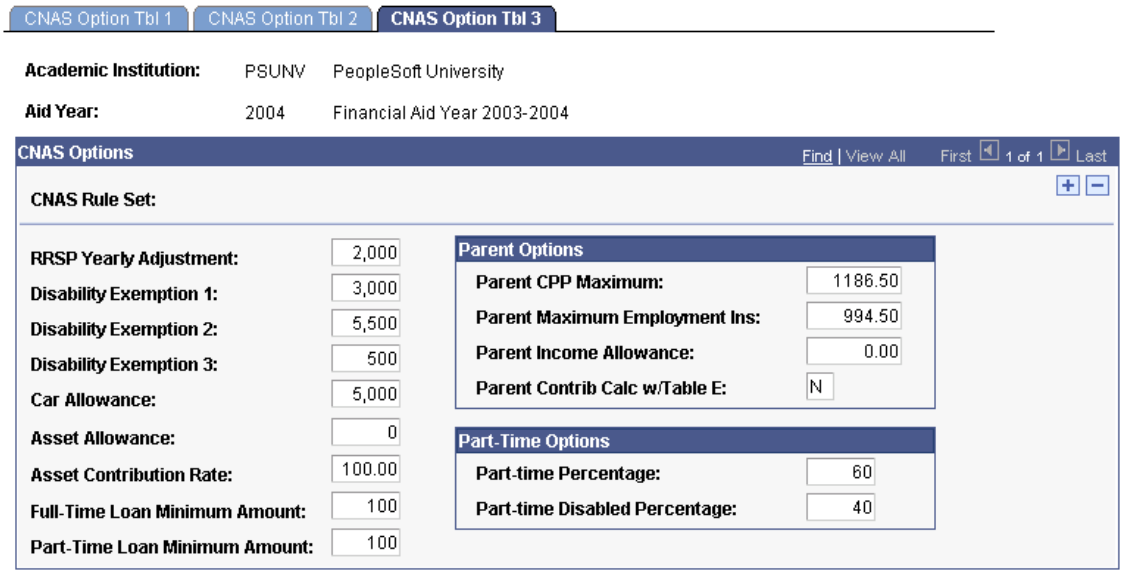
For more information, see the Canada Student Loan Manual

Defining CNAS Options - Table 3

Access the CNAS Options Tbl 3 (CNAS option table 3) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Option Table**, and then **CNAS Option Tbl 3**).

This example illustrates the fields and controls on the CNAS Option Tbl 3 page. You can find definitions for the fields and controls later on this page.

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The system displays the academic institution, aid year, and CNAS rule set selected on the CNAS Option Tbl 1 page.

Field or Control	Description
RRSP Yearly Adjustment (registered retirement savings plans yearly adjustment)	Enter the annual amount of retirement accounts registered to students and to student and spouse or common-law partner, if applicable, that are recognized as an allowance.
Disability Exemption 1	Enter the amount allowed for a student's first disability.
Disability Exemption 2	Enter the amount allowed for a student's second disability.
Disability Exemption 3	Enter the amount allowed for a student's third disability.
Car Allowance	Enter the amount allowed for a student-owned vehicle. The Financial Aid Administrator can increase the asset exemption level for vehicles up to 10,000 CAD in specific situations.
Asset Allowance	Enter the exemption amount allowed to reduce asset value.
Asset Contribution Rate	Enter the percentage rate used to assess a contribution based on assets.
Full-Time Loan Minimum Amount	Enter the minimum amount that can be loaned to a full-time student.
Part-Time Loan Minimum Amount	Enter the minimum amount that can be loaned to a part-time student.

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Parent Options

Field or Control	Description
Parent CPP Maximum	Enter the maximum annual contribution allowance for parents to the Canada Pension Program (CPP) based on income.
Parent Maximum Employment Ins (parent maximum employment insurance)	Enter the maximum annual contribution allowance for parents to the Employment Insurance program.
Parent Income Allowance	Enter the allowance amount that is applied against parents' income.
Parent Contrib Calc w/Table E (parent contribution calculation with table E)	Enter *Y* (yes) to base the calculation for the parents' contribution on information contained in Table E in the *Ontario Student Assistance Program Manual.*

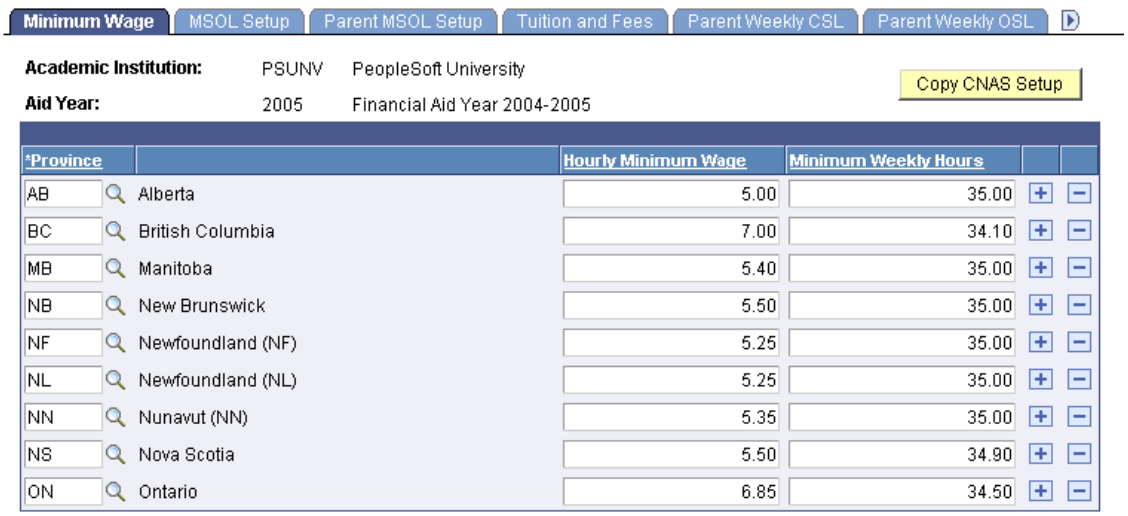
Part-Time Options

Field or Control	Description
Part-time Percentage	Enter the percentage of a full class load under which a student is considered a part-time student.
Part-time Disabled Percentage	Enter the percentage of a full class load under which a student with a disability is considered a part-time student.

Defining Financial Parameters for Minimum Wage

Access the Minimum Wage page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Minimum Wage Setup**, and then **Minimum Wage**).

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



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The Defining Financial Parameters component, of which this page is a part, stores table data for financial need assessment.

The system displays the academic institution and the aid year.

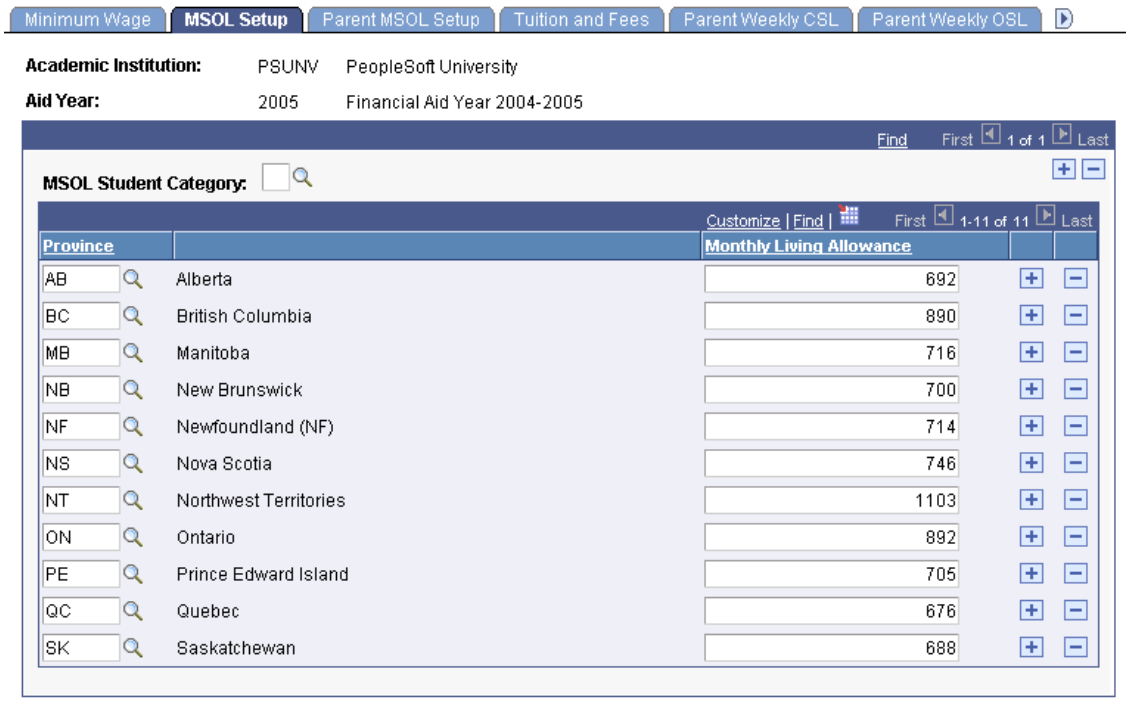
This page lists each province with its corresponding hourly minimum wage and minimum weekly hours that are considered as full-time work.

To copy a new academic institution or aid year, click the **Add a New Value** button at the Search level. Enter the academic institution and aid year. The **Copy CNAS Setup** button appears. Enter the academic institution and aid year information in the **Copy From** fields.

Defining Financial Parameters for MSOL Setup

Access the MSOL Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **MSOL Setup**).

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



The system displays the academic institution and the aid year.

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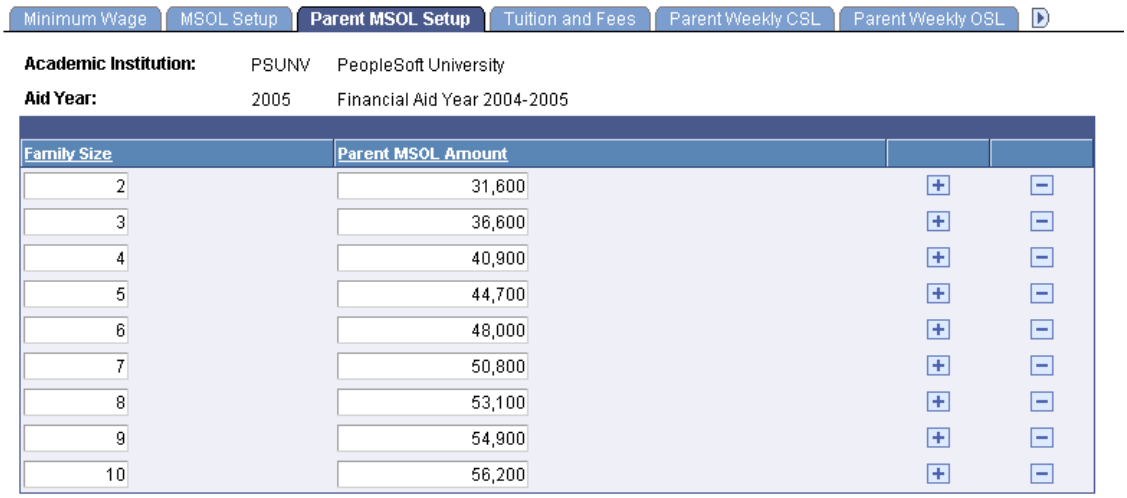
Field or Control	Description
MSOL Student Category	Enter a value for the moderate standard of living student category. Values are: *1:* Single away from home *2:* Single Parent *3:* Married *4:* Dependent Person *5:* Single at Home

This page lists each province, with the corresponding monthly living allowance amount.

Defining Financial Parameters for Parent MSOL Setup

Access the Parent MSOL Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent MSOL Setup**).

This example illustrates the fields and controls on the Parent MSOL Setup page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the aid year.

Field or Control	Description
Family Size	Enter the family size. For a dependent student, family size includes the student, parents, and dependent siblings. For an independent student, family size includes the student, the student's spouse, and any dependent children living with the student full-time during the study period.
Parent MSOL Amount	Enter the MSOL amount for each family size.

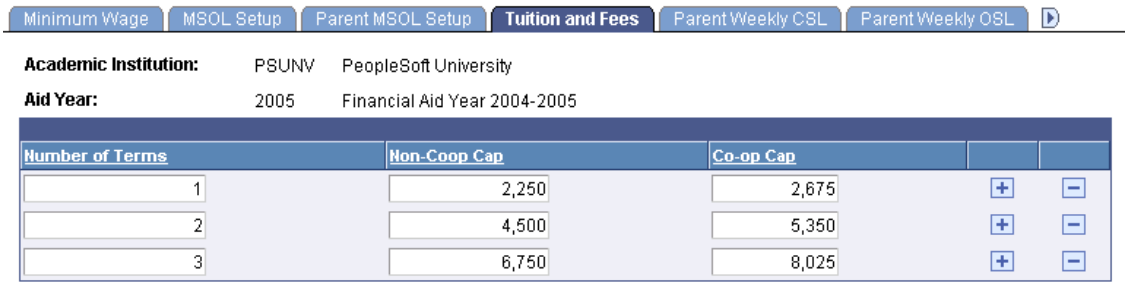
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Defining Financial Parameters for Tuition and Fees

In the OSL assessment, the value of tuition and compulsory fees used may be capped. The tuition, compulsory fees, and number of terms are used in certain need calculations for which fees are capped.

Access the Tuition and Fees page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Tuition and Fees Setup**, and then **Tuition and Fees**).

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



The system displays the academic institution and the aid year.

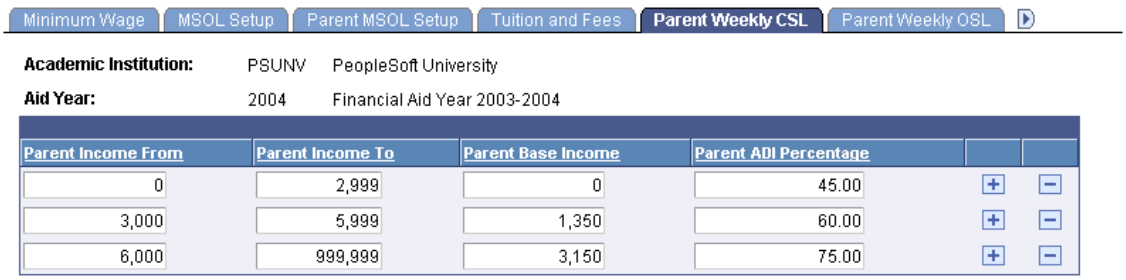
Field or Control	Description
Number of Terms	Enter the number of terms attended by the student.
Non-Coop Cap	Enter the combined cap amounts for tuition and compulsory fees for provincial colleges and universities for noncooperative programs. Tuition and fees are capped based on whether a program is regulated.
Co-op Cap	Enter the combined cap amounts for tuition and compulsory fees for provincial colleges and universities for cooperative programs. Tuition and fees are capped based on whether a program is regulated.

Defining Financial Parameters for Parent Weekly CSL Contribution

Access the Parent Weekly CSL page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Weekly CSL**).

This example illustrates the fields and controls on the Parent Weekly CSL page. You can find definitions for the fields and controls later on this page.

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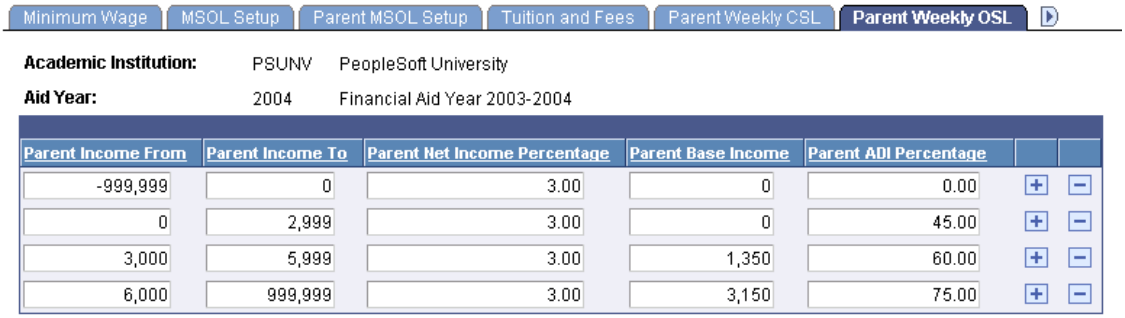
The system displays the academic institution and aid year.

This page shows the range of parent income, with the corresponding parent base income and the parent ADI (annual discretionary income). The system uses this information to calculate the parents' weekly contribution in the CSL assessment.

Defining Financial Parameters for Parent Weekly OSL Contribution

Access the Parent Weekly OSL page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Weekly OSL**).

This example illustrates the fields and controls on the Parent Weekly OSL page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the aid year.

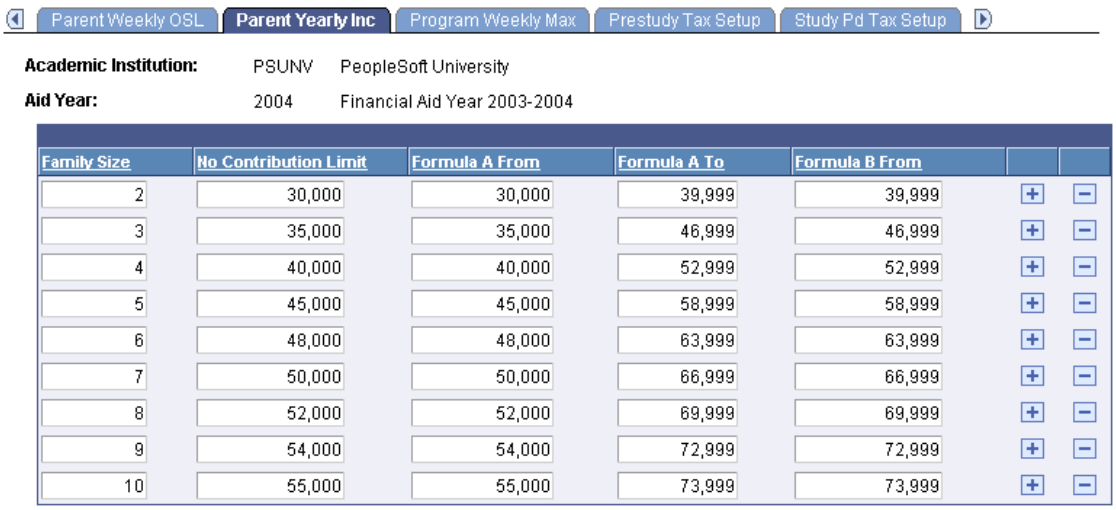
This page shows the parent income range, with the corresponding parent net income percentage, parent base income, and parent ADI. The system uses this information to calculate the parents' weekly contribution in the OSL assessment.

Defining Financial Parameters for Parent Yearly Income

Access the Parent Yearly Inc (parent yearly income) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Yearly Inc**).

This example illustrates the fields and controls on the Parent Yearly Inc page. You can find definitions for the fields and controls later on this page.

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The system uses two different methods to determine the expected level of parental contribution for OSL, depending on the amount of parental gross income reported on the OSAP application. Check the level of gross parental income for the family size determined in the *OSAP Student Eligibility and Financial Need Assessment Manual.*

The system displays academic institution and aid year.

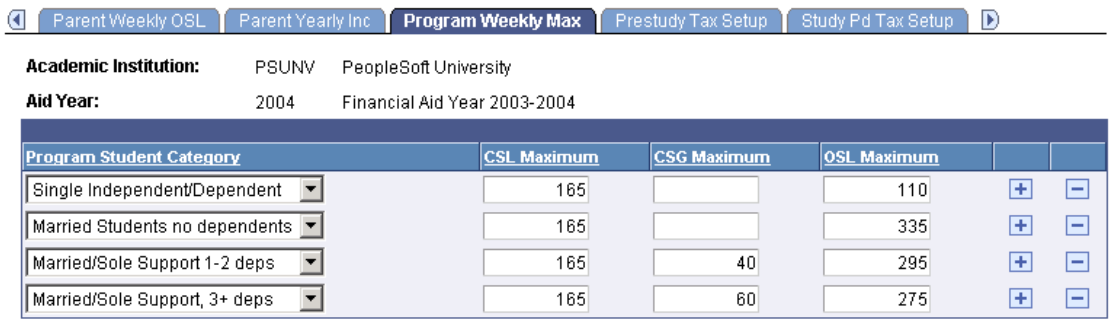
You can enter or view information about the **Family Size, No Contribution Limit, Formula A From, Formula A To,** and **Formula B From** fields.

For more information, see the Canada Student Loan Manual

Defining Financial Parameters for Program Weekly Maximum Entitlements

Access the Program Weekly Max (program weekly maximum) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Program Weekly Max**).

This example illustrates the fields and controls on the Program Weekly Max page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the aid year.

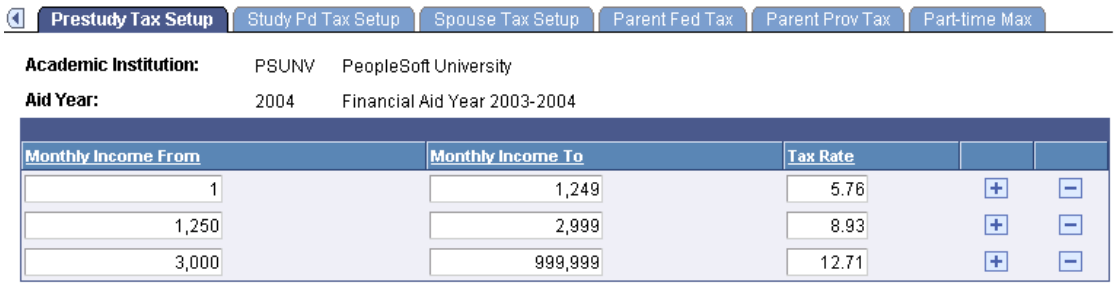
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Field or Control	Description
Program Student Category	Select the category into which the student belongs for a program. These values are delivered with the system.
CSL Maximum	Enter the CSL maximum for each program student category.
CSG Maximum	Enter the CSG maximum for each program student category.
OSL Maximum	Enter the OSL maximum for each program student category.

Defining Financial Parameters for Prestudy Tax Deductions Setup

Access the Prestudy Tax Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Prestudy Tax Setup**).

This example illustrates the fields and controls on the Prestudy Tax Setup page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the aid year.

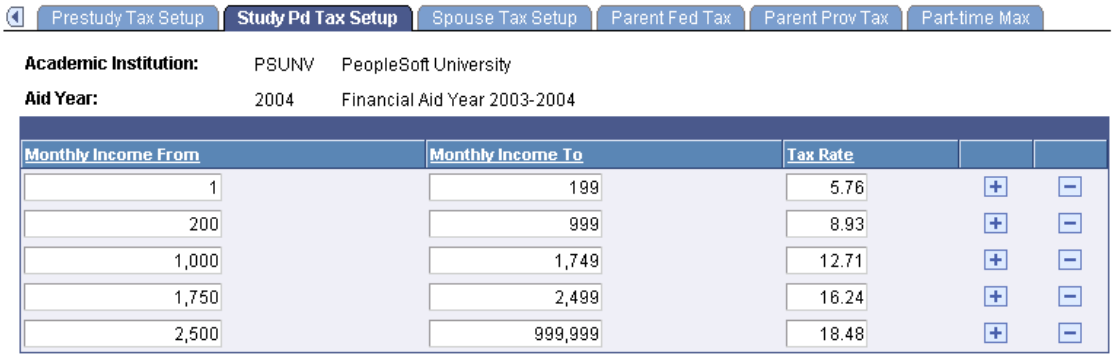
This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's monthly income during the prestudy period.

Defining Financial Parameters for Study Period Tax Deductions Setup

Access the Study Pd Tax Setup (study period tax setup) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Study Pd Tax Setup**).

This example illustrates the fields and controls on the Study Pd Tax Setup page. You can find definitions for the fields and controls later on this page.

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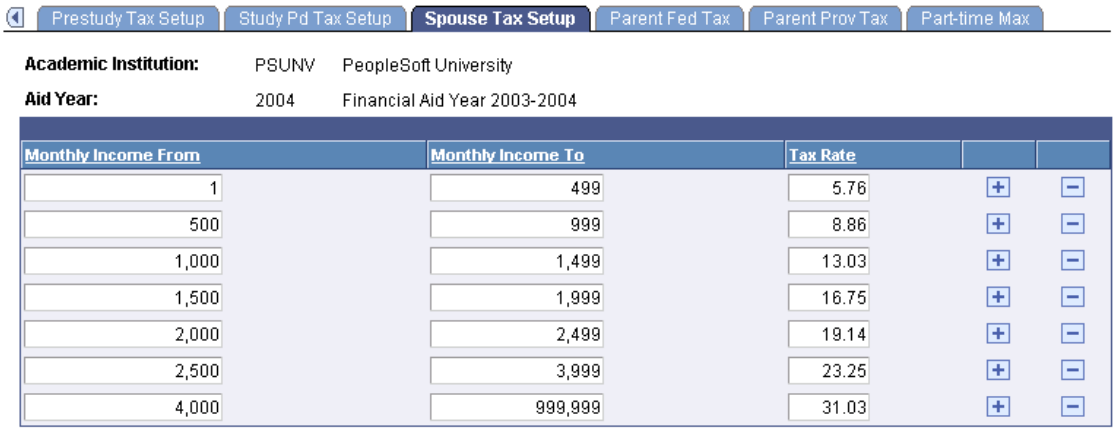
The system displays the academic institution and the aid year.

This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's monthly income during the study period.

Defining Financial Parameters for Spouse Tax Deductions Setup

Access the Spouse Tax Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Spouse Tax Setup**).

This example illustrates the fields and controls on the Spouse Tax Setup page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the aid year.

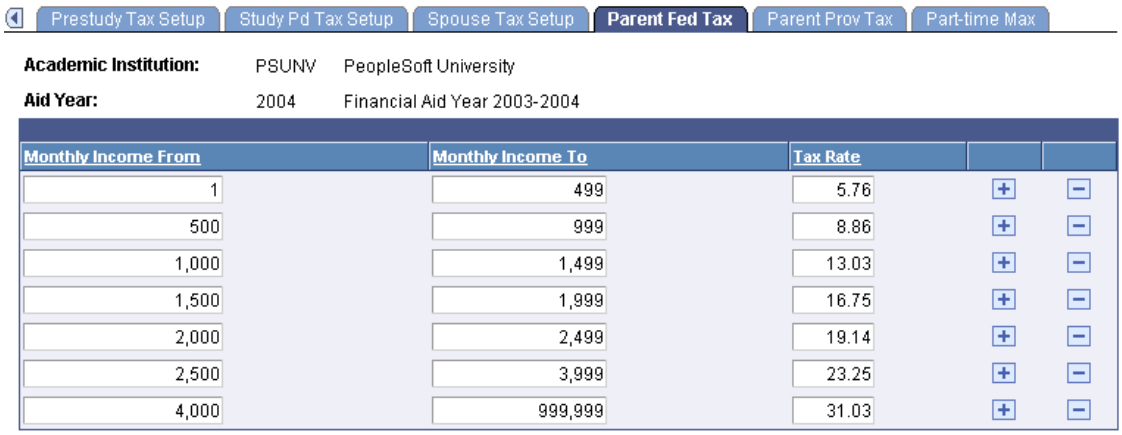
This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's spousal monthly income during the study period.

Defining Financial Parameters for Parent Federal Tax Deductions

Access the Parent Fed Tax (parent federal tax) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Fed Tax**).

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This example illustrates the fields and controls on the Parent Fed Tax page. You can find definitions for the fields and controls later on this page.



Monthly Income From	Monthly Income To	Tax Rate
1	499	5.76
500	999	8.86
1,000	1,499	13.03
1,500	1,999	16.75
2,000	2,499	19.14
2,500	3,999	23.25
4,000	999,999	31.03

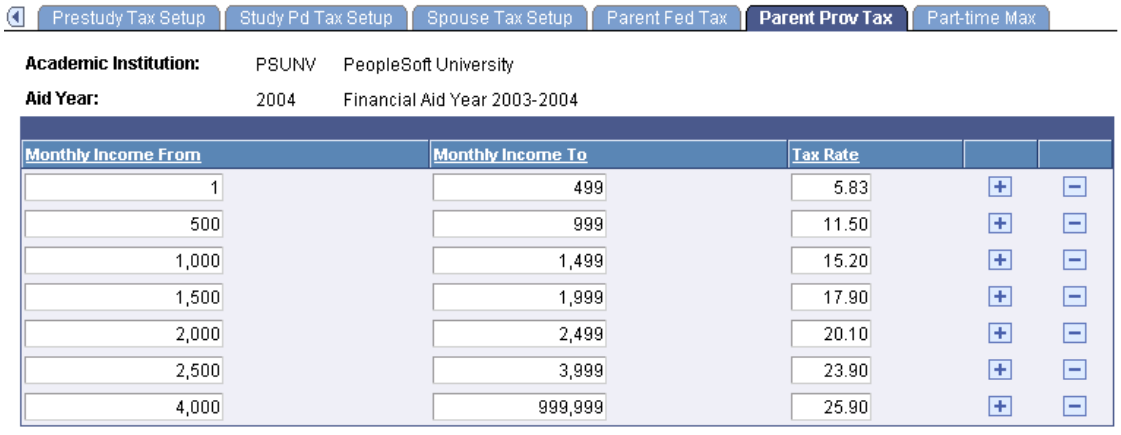
The system displays the academic institution and the aid year.

This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's parents' monthly federal income during the study period.

Defining Financial Parameters for Parent Provincial Tax Deductions

Access the Parent Prov Tax (parent provincial tax) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Parent Prov Tax**).

This example illustrates the fields and controls on the Parent Prov Tax page. You can find definitions for the fields and controls later on this page.



Monthly Income From	Monthly Income To	Tax Rate
1	499	5.83
500	999	11.50
1,000	1,499	15.20
1,500	1,999	17.90
2,000	2,499	20.10
2,500	3,999	23.90
4,000	999,999	25.90

The system displays the academic institution and the aid year.

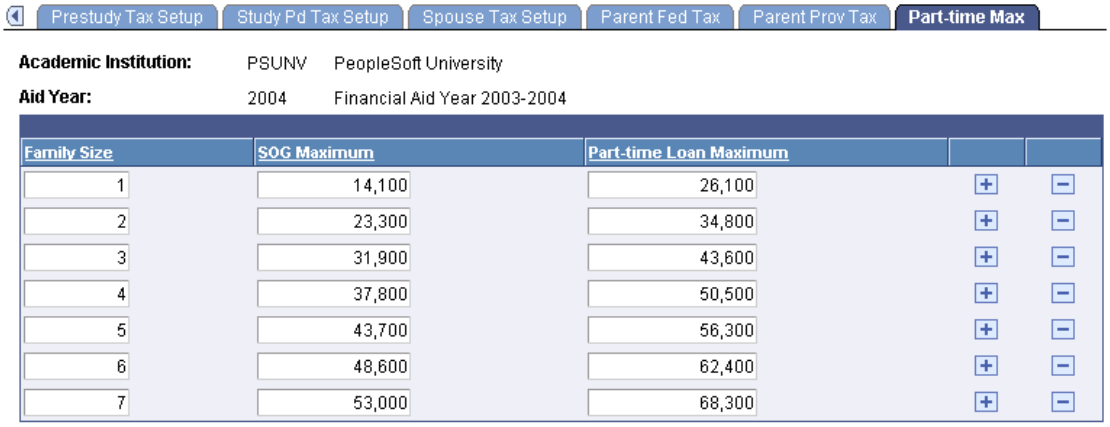
This page lists the Monthly Income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's parents' monthly provincial income during the study period.

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Defining Financial Parameters for Part-time Maximum Entitlements

Access the Part-time Max (part-time maximum) page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **CNAS Setup**, and then **Part-time Max**).

This example illustrates the fields and controls on the Part-time Max page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the aid year.

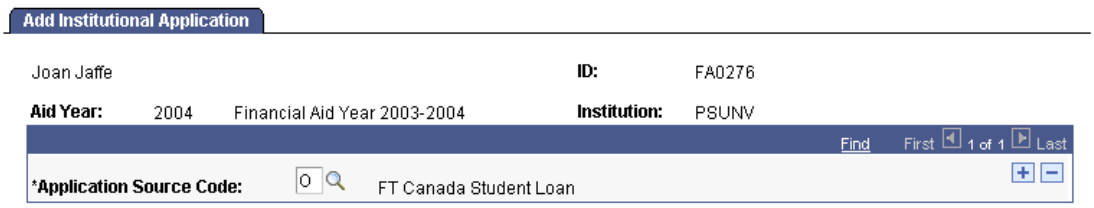
Field or Control	Description
Family Size	Enter the student's family size for each maximum amount.
SOG Maximum	Enter the maximum SOG for each family size. The maximum amounts are based on the maximum total family gross income, assets, and family size.
Part-time Loan Maximum	Enter the maximum for a part-time CSL for each family size. The maximum amounts are based on the maximum total family gross income, assets, and family size.

Adding a Full-time or Part-time Canadian Application

Access the Add Institutional Application page (**Financial Aid**, and then **Canadian Application Data**, and then **Add Institutional Application**).

This example illustrates the fields and controls on the Add Institutional Application page. You can find definitions for the fields and controls later on this page.

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The system displays the student name and ID, aid year, and institution.

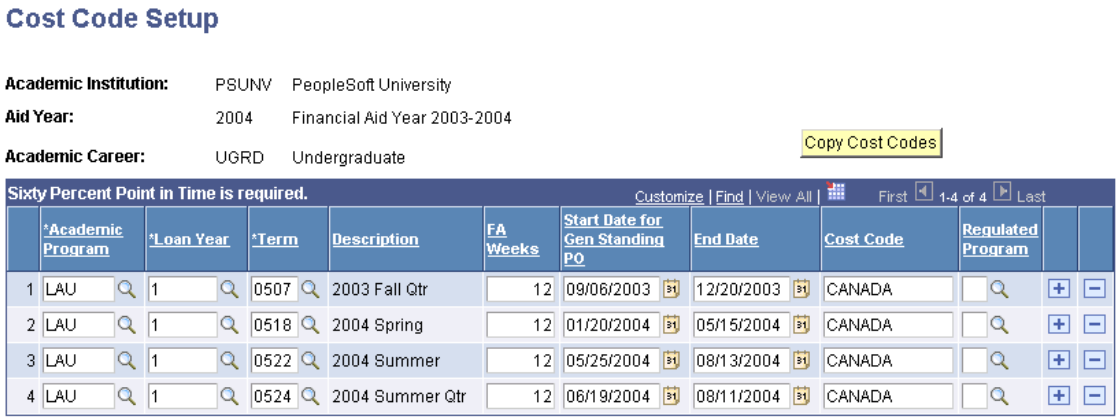
Field or Control	Description
Application Source Code	Select an application source code. Values for Canadian institutions are: *O:* Full-time Canada Student Loan. *P:* Part-time Canada Student Loan.

Part-time applications must have a source code of P (part-time) to ensure correct CNAS calculation.

Setting Up Cost Codes

Access the Cost Code Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Canada Application Processing**, and then **Cost Code Setup**).

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



The system displays the academic institution, aid year, and academic career.

Enter values for the cost codes for your institution for each of the fields.

To copy a new academic institution, aid year, or academic career, enter the new parameters at the search level. The system displays the **Copy Cost Codes** button. Click the button and enter the academic institution, aid year, and career information in the **Copy From** fields. After you enter information in the **Copy From** fields, the system displays the **Academic Program** and **To Term** fields.

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19

Managing Financial Aid Terms

Understanding Managing Financial Aid Terms

This section lists prerequisites and discusses methods to build financial aid terms.

Related Topics

- Understanding Financial Aid Terms
  A financial aid term is a combination of a period of time that your school determines as an instructional accounting period and an academic career. Your institution defines the financial aid terms during the setup process. Because some institutions might not offer financial aid for all of their academic terms, only the terms eligible for financial aid are set up for each financial aid career. For example, if your institution does not offer financial aid for an intersession term, you would not set up the intersession term as a valid term for a career. To receive financial aid, a student must be enrolled in a valid program leading to a degree or certificate and must meet satisfactory academic progress standards.

Prerequisites

Before you begin setting up and building financial aid terms, complete the setup tasks discussed in the "Setting Up Financial Aid Terms".

You must understand level/load rules. These rules determine a student's academic level and academic load and are set up as part of the PeopleSoft Student Records setup. You should jointly set up level/load rules with the student records staff. Financial aid term data is driven by these level/load rules, so you need to know how they are set up for your institution.

Financial aid term data also depends upon career information, including career primacy information, from the Academic Career Table component.

Your institution also needs to have set up academic programs, because financial aid term uses program information when building a student's financial aid term. Financial aid terms are built only for programs that are designated as financial aid eligible.

You should also review the Valid Terms for Careers page. When you select which terms should be built as financial aid terms for each career by the online and background financial aid term process, only the terms defined as valid for each career on this page are available for selection.

With the One Big Beautiful Bill (OB3) implementation, starting AY2027 onward, financial aid term data will use information on the FA Term Details setup on the Academic Plan Table setup to determine building of summer terms and determination of term and annual loan limit percentages.

Related Topics

- Defining the Parameters for Creating Financial Aid Terms
  To set up financial aid terms, use the Set Up Financial Aid Term component (FA_TERM_SETUP).
- Campus Solutions Application Fundamentals: Defining Academic Level and Load Rules

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- Campus Solutions Application Fundamentals: Defining Academic Careers
- Campus Solutions Application Fundamentals: Defining Academic Programs
- Defining Terms Required by Academic Plan

Methods to Build Financial Aid Terms

You can build Financial Aid Terms in one of three ways:

- Manually
- Online
- In batch

Use the manual build process when data from Student Records is not available for a student, when you receive new records, or after an add/drop period. To build a financial aid term manually for a student, you must enter all required data in the Financial Aid Term component. The data you enter manually is replaced when term enrollment, program, or admissions data becomes available for the student.

Build terms online if there are records for a student from Student Records and you want to see this data or the changes to this data. Click the **Build** button on the FA Term page to run the online build process.

Build terms in batch to process multiple students at the same time using data from Student Records or PeopleSoft Recruiting and Admissions (if you choose to build for both updates and projections). To build financial aid terms in batch, create an FA Term driver record and then run the background process using the FA Term driver record on the Build FA Terms page.

Building Financial Aid Terms Online

This section lists common elements and discusses how to:

- Set overrides for financial aid term.
- Build a financial aid term.
- View term build details.
- Override census date locking.
- View academic advisor information.
- View campus information.
- View academic level and load information.
- View academic statistics.
- View transfer credit information.
- View term statistics for a student's other career.
- View a list of the student's classes.
- View loan, graduation, and budget information.
- View changes in a student's FA Term information.
- View Student Records term information.
- View withdrawal information.

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Common Elements

Field or Control	Description
Calculated Values	This column displays the values calculated by the system during the financial aid term build process for the associated fields. These values are based on the student's enrollment, academic and financial load, and academic level. The calculated values exist only when the FA Term is built online or in batch. If you build the financial aid term manually, the system does not display the calculated values. If you update the values manually, the calculated values do not change.
Seq (sequence)	Displays the number automatically assigned when you create a new effective-dated row. The sequence number provides a unique identifier when two rows exist with the same effective date.

Pages Used to Build Financial Aid Terms Online

Page Name	Definition Name	Navigation	Usage
FA Term	STDNT_FA_TERM	**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **FA Term**	Build a term or view a student's term information. You can also override the lock on Financial Aid Term values using this page.
FA Term Build Statistics	FA_TERM_STATS_SEC	Click the **Build Info** link on the FA Term page.	View term build details.
FA Term Census Date Locking	STDNT_FA_TRM_CENDT	Click the **Census Date** link on the FA Term page.	Override the census date locking feature at the student level. View the locked fields and the value used if you unlock the census date. When you override the census date lock, the override applies only to the term displayed on this page—not the entire aid year. For example, overriding the fall term does not override the spring term.
FA Term Academic Advisor Information	STDNT_FA_ADVIS	Click the **Advisor** link on the FA Term page.	View or assign the student's academic advisor. This includes data on the advisor's role and committee affiliation.

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Page Name	Definition Name	Navigation	Usage
FA Term Campus Information	STDNT_FA_CAMP_SEC	Click the **Campus Info** link on the FA Term page.	View or modify the campus (physical location) where the student receives financial aid, registrar, and advising services.
Acad Level (academic level)	STDNT_FA_ACAD_LVL	**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Acad Level**	View, add, or update a student's academic level and load (academic and financial aid) information for a particular term.
Statistics	STDNT_FA_STATS	**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Statistics**	View, add, or update a student's academic statistics including GPA (grade point average), residency information, and progress for a term.
FA Term Transfer Credits	STDNT_FA_STAT_TC	Click the **Transfer Credit** link on the Statistics page.	View transfer credit information for a student. This includes transfer credit for test scores on the Advanced Placement test or SAT II tests.
FA Term Other Units	STDNT_FA_STAT_INEL	Click the **Other Units** link on the Statistics page.	View term statistics for a student's other academic career.
FA Term Class Detail	STDNT_FA_CLASS_SEC	Click the **Class Detail** link on the Statistics page.	View a list of the student's classes. Indicates whether the classes are Open Entry/ Open Exit sessions and providing start and end dates for each class.
Financial Aid Info	STDNT_FA_LOAN	**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Financial Aid Info**	View or modify loan, graduation, and budget information that is relevant to financial aid processing for a term.
FA Term Field Audits	STDNT_FA_AUDIT_SEC	Click the **Field Audits** link on the Financial Aid Info page.	View changes in a student's FA Term information from the previous effective-dated row.
Records/Term Info	STDNT_FA_REC	**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Records/Term Info**	View or modify the student's Student Records information for a term.

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Page Name	Definition Name	Navigation	Usage
Withdrawal Info	STDNT_FA_WITHDRAW	**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Withdrawal Info**	View withdrawal information from Student Records.
OB3 Info	STDNT_FA_OB3	**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **OB3 Info**	View, add, or update a student's data related to new fields under the One Big Beautiful Bill (OB3) requirements for a particular term.

Setting Overrides for Financial Aid Term

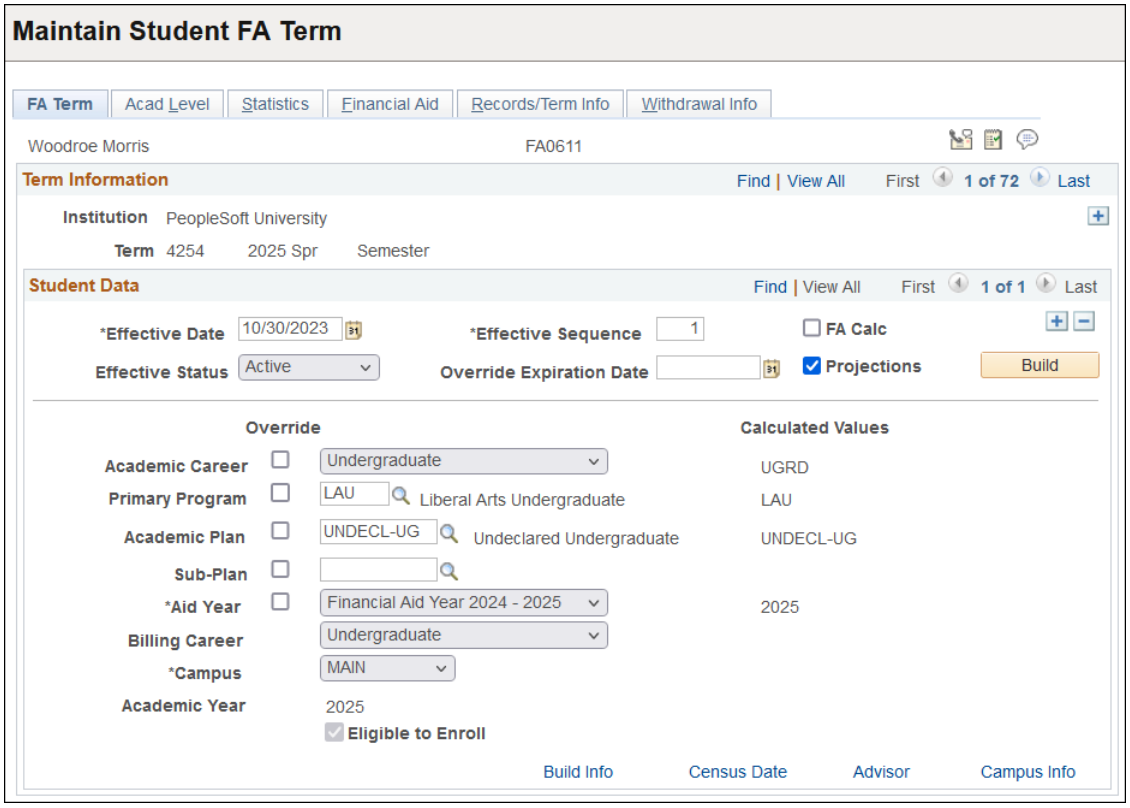
While the system continues to set override fields automatically by changes in FA term data, you can set or reverse the settings based on your business requirements. When you manually modify FA term information, the system evaluates the selected field and compares the changed value with the corresponding calculated value. If the values are not equal, the system activates the override check box. Conversely, if the values match, the system clears the check box. The FA term build process can also set the override for selected fields when the field value does not match the calculated value. There are no changes to the FA term build process to accommodate the override fields.

Building a Financial Aid Term

Access the FA Term page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **FA Term**).

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

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Previously, when students had more than one academic plan for their primary academic program, the FA term process evaluated the academic plan value and selected plans in alphabetical order. Now, in these cases, the FA term process uses the academic plan with the lowest academic plan sequence number. This change provides you with the ability to control the plan that is used by the FA term build process. You can use the Student Program/Plan component to reset the plan sequence number so that the next time the FA term process runs, it uses the academic plan that you want.

Field or Control	Description
Term	If you are building terms manually, enter the term value. Otherwise, the Financial Aid Term build process updates this field. The build process only builds terms that are defined for the given aid year. **Note:** FA Term uses the setup tables for Valid Careers for Aid Year and Valid Terms for Career to determine which aid year a term should be linked to. If you set up future terms, you must set up the corresponding aid year for those future terms. For example, if you had not set up 2005-2006 and were to run FA Term only for 2004-2005, the system would not recognize a term outside of the academic/aid year.

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Field or Control	Description
FA Calc(financial aid calculation)	Select to require the financial aid term build process to determine whether changes have occurred to the student's data in Student Records or Admissions (such as enrollment changes). After you have selected this check box, click **Save** and then click **Build.** If a change has occurred, this term and all following terms are rebuilt using the new information. Note. In most cases, the build process automatically determines whether changes have occurred in Student Records information and rebuilds terms with changed records data. This is triggered by changes to fields defined in PS_STDNT_CAR_TE_VW.

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Field or Control	Description
Projections	Select to instruct the build process to build a term in projection if necessary. The build process tries to build each term that you have selected on the FA Term Setup page, using a variety of sources. The build process looks for data in the following order: 1. Term enrollment data in Student Records. If this data is found, the financial aid term is not built with projected data and has a source of *Term.* 2. Program information for the student in Student Records. If this data is found, the financial aid term is built in projection and has a source of *Program.* 3. Program information from the student's application in Recruiting and Admissions. If this data is found, the financial aid term is built in projection and has a source of *Admissions.* If the build process cannot find any of these three sources of information, the financial aid term is built with a source of *No Data.* The financial aid term build process does not build terms in future aid years in projection; it only builds terms in future aid years for which enrollment data exists. It is possible to build a projected FA term record of source admission or program for a student who is term activated after the start of the term. The FA Term build process uses the term activation deadline date maintained by Student Records to determine whether a projected FA term record can be built for a student. By default, term activation can occur until the start of the term, but this date can be modified to permit rolling enrollment of students in the term. The **Max Program Effdt for Term** field in the Term/Session Table component is where you can modify this setting. Verify with your student records staff their term activation policies to determine the effect on financial aid application processing. **Note:** You cannot build a term in projections after the financial aid census date has passed. Any terms that are still in projections on the financial aid census date automatically have their values set to zero, with a build source of *No Data.*Additionally, if the student has no financial aid awards and does not have a budget amount greater than zero for the term, the system sets the effective status of the term to *Inactive*. The financial aid census date for each term is entered in the FA Census Date field on the FA Term Setup page.

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Field or Control	Description
Override Expiration Date	When you select a value that differs from the value in the **Career, Prim Prog, Acad Plan, Sub-Plan, Aid Year,** and **Billing Career** fields, the Financial Aid Build routine does not recalculate the field for the associated term. All override fields are recalculated using the calculated values. To have the build process use Student Records data after a certain date in the term, enter that date in this field. When you run the build process on or after this date, the override values you entered are ignored and data from Student Records is used.
Academic Career, Primary Program, **Academic Plan**, **Sub-Plan**, and **Aid Year**	You can override the values in these fields by selecting a new value in each field that differs from the value in the **Calculated Values** column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the **Override Expiration Date** field.
Billing Career	The financial aid term build process populates this field with information from the Term Activation page in Student Records. This field is for use in equations (budget or packaging) and any changes made to the field are discarded during the next build. PeopleSoft Student Financials uses the value for billing career from the Term Activation page during tuition calculation.
Campus	Indicates the physical location of the administrative services associated with the student's academic program. This value is used to determine the Enrollment School Code that is reported to COD. See Defining Your Campus OPEID Codes See Reviewing Pell Disbursement Results. See Processing and Reviewing Loan Application Acknowledgement Data.
Eligible to Enroll	For informational purposes only. Displays the same value as the **Eligible to Enroll** check box on the Term Activation page in Student Records. When selected, the Student Records batch enrollment selects and processes the student.

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Field or Control	Description
Build	Click to build a term for the student using the system rules established on the FA Term Setup page. The system builds a term only if Student Records contains data for the student, unless you have selected the **Projections** check box—then the build process uses projected enrollment data. If one or more of the audited fields have changed, a new effective-dated row is automatically inserted. See Viewing Changes in a Student's FA Term Information.
Build Info	Click to access the FA Term Build Statistics page and view details for the build.
Census Date	Click to access the FA Term Census Date Locking page and view the census date and fields locked after the census date and override the census date.
Advisor	Click to access the FA Term Academic Advisor Information page and view or enter information regarding a student's advisor. This includes data on the advisor's role and committee affiliation.
Campus Info	Click to access the FA Term Campus Information page and view the student's Financial Aid Campus, Registrar Campus, and Advisement Campus.

Setting Terms to Inactive

Setting the most recent effective-dated FA Term record effectively removes that term from becoming recognized by all other financial aid processes. Rather than delete FA Term rows, you should make rows inactive. If you attempt to set an FA Term to inactive, a warning message appears if the student has a budget for the term. If so, first verify that the student has no awards for the term and make any required adjustments to the student's awards before setting the term inactive. The FA disbursement processes cannot be run for inactive terms. The system displays another warning message if the student has enrollment data for the term.

There is functionality in the FA Term build process where the term source is set to *No Data*—no enrollment data exists for the term after census or the end of the term. If the student has no awards and does not have a budget amount greater than zero for the term, the system sets the term to an *Inactive* status. If, however, the student has an award for the term with either an offered amount, authorized amount, or disbursed amount greater than zero, the term remains in an active status. In addition, future terms recalculate cumulative units, projected levels, NSLDS Lending and Direct Lending loan years and not include data from terms with a source of *No Data* regardless of the status of the term.

Term Progression

Student Records contains functionality that enables you to increment student academic levels by term and not by units to address cooperative system progression rules and graduate studies progression rules. The FA Term Build process recognizes progression by terms.

During the build process, the system checks whether the level determination on the Level/Load Rules Table page is *Units, Terms, Manual,* or *Default.* If the level determination is *Terms,* then

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the FA Term Build process calculates the academic level, NSLDS Loan Year, and Direct Lending Year using the student's terms in residence.

When you are building terms for projected enrollment, the student's academic load comes from the admissions application or the academic program. The FA Term Build process then uses this academic load to calculate the term count for the projected term.

Students in academic programs using progression by term may not always enroll in courses. Because terms in which the student does not enroll in courses are built with projected data, you need to understand the *No Data* value for the **Source** field on the FA Term Build Statistics page, which affects past projected terms. To ensure that students in this situation are progressing correctly, you may need to go back and build past aid years to show the student's actual progression.

Career Primacy

In determining the career value, in the case where the student has multiple valid careers, career primacy is enforced based on the term source. For example, the evaluation of career primacy is sensitive to the term source. Based on the term source of the FA Term record, the system evaluates only careers at that source level and applies primacy rules when more than one career exists. FA Term ranks term source in the following priority order:

1. 1st Term (student has enrollment data for the term).
2. 2nd Program (student is active for an academic program).
3. 3rd Admissions (student has an active admissions application).

When the FA Term build process runs and determines the source of the term in process, the system can only assign careers at that level to the term.

This table is an example of career and primacy.

Career	Primacy
UGRD	1
UENG	4

This table is an example of career primacy based on the term source.

Example/Condition	FA Term Career Used (Term Source)
Student admitted in UGRD.	UGRD (Admission)
Student also admitted in UENG.	*Primacy was applied at the admission level.*
Student matriculated for UENG.	UENG (Program)
Student admitted, but not matriculated for UGRD.	*Primacy was not applied because there was only one career at the program level.*
Student matriculated for UENG.	UGRD (Program)
Student also matriculated for UGRD.	*Primacy was applied at the program level.*
Student enrolled for UENG.	UENG (Term)
Student matriculated, but not enrolled for UGRD.	*Primacy was not applied because there was only one career at the term level.*

Viewing Term Build Details

Access the FA Term Build Statistics page (click the **Build Info** link on the FA Term page).

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Field or Control	Description
Source	Displays the source of the build. *Admissions:* The student is not in the Student Records system but has either applied for admission or has been accepted for admission. In either case, the student is not yet matriculated and terms are built in projection. *Manual:* Data for the financial aid term was entered manually, and is not based on data from Student Records or Recruiting and Admissions. *No Data:* The term contained old projections data, and all statistical values for that term are set to zero to prevent old projected data from counting in the cumulative values for a given student. For example, you might receive this source value for terms in a current aid year that are still projected when you build projected terms for the next aid year. Another example is when a term built with a source value of *Program* for an aid year that has passed that is rebuilt when you build terms for the subsequent aid year in projections. If you want to maintain past projected term data, you have to go into the past aid year and rebuild the aid year in projections. When you process past aid years, current and future aid years are not set to *No Data.* *Program:* The student exists in the Student Records system but has not enrolled in courses for that term. The student can either have a program defined without being term activated or the student has a program defined and could be term activated but not yet enrolled. The financial aid term is built in projection. *Term:* The statistics are from enrollment data. The student has enrolled or changes to enrollment have occurred, including a drop of all courses for the term.
Online/Batch	Indicates whether the build was performed manually, online, or in batch. Values are *Batch* and *Online Execution.* If the field is blank, the build was performed manually.

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Field or Control	Description
Driver Option	Populated for students whose financial aid terms are built in batch or online. Identifies whether the FA Term driver record used to run the background process builds: • Only those terms that have enrollment data or changes to enrollment data *(Updates Only).* • Terms using projected data as well as enrollment data *(Updates and Projections).* For an online build process to have a driver option of *Updates and Projections,* you must select the **Projections** check box on the FA Term page.

Overriding Census Date Locking

Access the FA Term Census Date Locking page (click the **Census Date** link on the FA Term page).

Field or Control	Description
Census Date Used	Displays the census date used to determine when the **FA Load, FA Taken,** and **Budget Required** fields are locked. The date displayed indicates which census date takes precedence if the term has an academic census date and a financial aid census date. When both census dates exist, the financial aid census date always takes precedence.
Lock After Census Date	Indicates whether the **Lock** check box is selected on the FA Term Setup page. If selected, the **FA Taken** and **FA Load** field values are locked with the data as of the census date, and the **Budget Required** field is set to *No Assign.*
Override Census Date Locking	Select to override the census date locked fields for the term for this student. To use a census date override, the current date must be after the date in Census Date Used. Using an override enables you to update the **FA Taken, FA Load,** and **Budget Required** fields when you rebuild the FA Term. After selecting this check box you must close the page and click **Save.** Then click the **Build** button to rebuild the FA Term for the student online. You can override the census date lock only for an individual student, not as a background process. After you have selected this check box and saved the page, you cannot clear it.
Lock Override User	Indicates the user ID of the person who selected the **Override Census Date Locking** check box. This field is only populated if the census date has passed and the **Override Census Date Locking** check box is selected.

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Field or Control	Description
Lock Override Date	Displays a date/time stamp inserted by the system when the **Override Census Date Locking** check box is selected. This field is only populated if the census date has passed and the **Override Census Date Locking** check box is selected.
Financial Aid Census Date	Displays the financial aid census date defined by your institution for each term on the FA Term Setup page. After the financial aid census date for a term has passed, that term can no longer be built as a projection and any existing projections for that term are rebuilt and the new effective-dated row has a status of inactive. (Remember that a new effective-dated row is inserted if a change occurs in one of the audited fields when you rebuild the financial aid term.) The source for the new effective-dated row is *No Data* all term statistics are set to zero, and the **Budget Required** field is changed to *No Assign.* If the student has a budget, you may need to reevaluate the student's budget. If the student has financial aid awards, you may need to cancel these awards because the student is not enrolled. If the student's terms have been built with enrollment data (not in projection), on and after this date, the **FA Load, FA Taken,** and **Budget Required** fields are locked. If an academic census date and a financial aid census date exist, the financial aid census date is used to determine the locking of these fields and is displayed in **Census Date Used** field. **Important:** If you want to use the academic census date to lock the **FA Taken, FA Loan,** and **Budget Required** fields, then you must delete the financial aid census date on the FA Term Setup page. Remember that this affects all students for the term in the given career.
Academic Census Date	Displays the census date defined by your institution for each session in a term in Student Records. If a term has multiple sessions, you can define a default session for the term in Student Records. If a default session exists, the academic census date is the census date of the default session. If no default session exists, the system uses the census date of the regular academic session as the academic census date. On and after the academic census date, the **FA Load** and **FA Taken** fields are locked and the **Budget Required** field is changed to *No Assign.* If an academic census date and a financial aid census date exist, the financial aid census date is used to determine the locking of these fields and is displayed in **Census Date Used** field.

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Field or Control	Description
FA Taken (financial aid units taken)	Displays the student's financial aid units taken as of the census date. If the **Lock After Census Date** check box is selected, this field displays the locked value.
FA Taken Unlock (financial aid units taken unlock)	Displays the value for the actual financial aid units after the census date. You must rebuild the FA Term to have the most current units displayed in this field. This allows you to see the effect on the financial aid units taken if you select the **Override Census Date Locking** check box.
FA Load (financial aid load)	Displays the student's financial aid load as of the census date.
Budget Required	Displays the value of the **Budget Required** field on the Financial Aid Info page in this component. The student's value determines his or her stage in the budget build process. If you use census date locking, after the census date passes the value in this field, it becomes *No Assign.*

Viewing Academic Advisor Information

Access the FA Term Academic Advisor Information page (click the **Advisor** link on the FA Term page).

> **Note**
>
> This page displays data from PS_STDNT_ADVR_HIST. This data is maintained and entered on the Student Advisor page (Manage Student Records, Track Student Careers, Use, Student Advisor).

Field or Control	Description
Academic Advisor	Displays the ID of the academic advisor assigned to this student.
Advisor Role	Displays the role of this student advisor.
Committee	Displays the committee on which this advisor serves.

Viewing Campus Information

Access the FA Term Campus Information page (click the **Campus Info** link on the FA Term page).

Field or Control	Description
FA Campus(financial aid campus)	Enter the physical location where the student receives financial aid services.

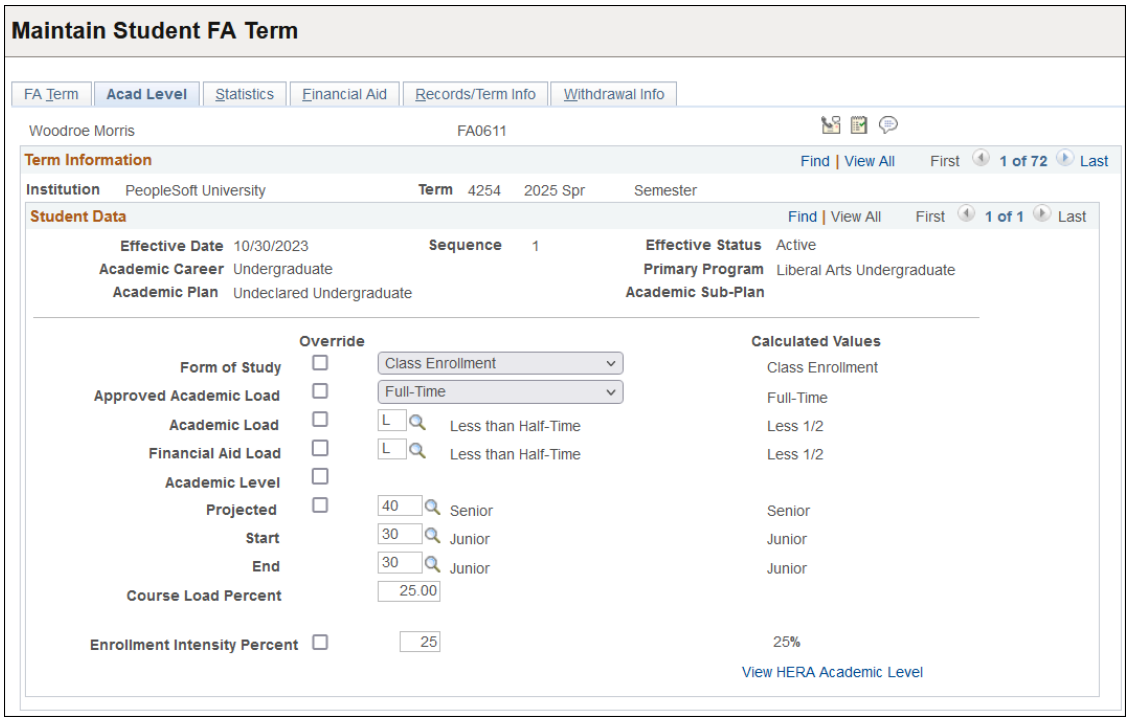
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Field or Control	Description
Registrar Campus	Enter the physical location of the registrar responsible for the student.
Advisement Campus	Enter the physical location where the student goes for advising services.

Viewing Academic Level and Load Information

Access the Acad Level page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Acad Level**).

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



You can override the values in the **Form of Study, Approved Academic Load,Academic Load,Financial Aid Load,Academic Level - Projected,Academic Level - Start,** and **Academic Level - End** fields by selecting a new value in each field that differs from the value in the **Calculated Values** column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the **Override Expiration Date** field on the FA Term page.

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Field or Control	Description
Override	To activate the **Override** check box for any field, modify the field value so that it differs from the value in the **Calculated Values** column.
Form of Study	The system populates this field by default with the Student Records value. Values include: *Detached, Enrollment, Abroad,* and *Candidacy.*
Approved Academic Load	The system populates this field by default with the load value that exists for the primary academic career. Values are *Full-Time* and *Part-Time.*
Academic Load	The number of units the student is enrolled in determines the student's academic load. The number of units, which is the sum of the Academic Progress Units value (from the Catalog Data page) for each class the student is enrolled in, is compared against the level/load rules to determine the appropriate academic load. For this calculation, the system uses the number of units defined for the student's courses according to Student Records. The same courses may count for a different number of financial aid eligible units. Values are: *Full-Time, Half-Time, Less 1/2, No Units, Part-Time,* and *3/4 Time.*
Financial Aid Load	The system normally derives the value by comparing the calculated unit cumulative with the unit conversion. The system compares the number of units, which is the sum of the Financial Aid Progress Units value (from the Catalog Data page) for each class the student is enrolled in, against the level/load rules to determine the appropriate load value. For this calculation, the system uses the number of financial aid eligible units defined for the student's courses according to Student Records. The same courses may count for a different number of academic units. Values are: *Full-Time, Half-Time, Less 1/2, No Units,* and *Three Qtrs.*
Academic Level	**Note:** The values in the three academic level fields, **Projected**, **Start**, and **End**, are based on level/load rules associated with the student's primary academic program. Only those academic levels that are associated with the student's primary academic program academic level rule are available. Academic level values are shipped with the system as translate values. These translate values can be modified.

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Field or Control	Description
Academic Level - **Projected**	This field displays the projected academic level for the student at the end of the term, based on Student Records data. The projected level is based on the student completing all courses in prior terms, plus the enrollment for the current term. For example, the student has passed thirty units in previous terms and is currently enrolled in twelve units. The system uses the sum of these units, forty-two, to determine the student's academic level using level/load rules.
Academic Level - **Start**	This value represents the total number of units the student has passed in all previous terms. The system uses the sum to determine the academic level using load/level rules.
Academic Level - **End**	The student's academic level at the end of the term equals the cumulative passed units from previous terms, plus the number of units passed for the current term. The system uses the sum to determine the academic level using load/level rules. The Projected Academic Level always matches the End Academic Level when term progression is used in the Level/Load rule applied to the student.
Course Load Percent (course load percentage)	The course load percentage provides an alternative way to define full-time and less than full-time students based on percentages. The value in this field is derived from level/load rules. When you invoke the FA Term process, the system calculates the course load percentage for each student.
Enrollment Intensity Percent (enrollment intensity percentage)	**Enrollment Intensity Percent** is used to calculate Pell Grant awards for the 2024-2025 and future Aid Years. The percentage can't be greater than 100. The system compares the number of financial aid eligible units defined for the student's courses according to Student Records against the level/load rules for full-time enrollment to determine the appropriate percentage. This field can be updated using Population Update: SFA_ENRL_INTENSITY field on STDNT_FA_TERM record/table.

Related Topics

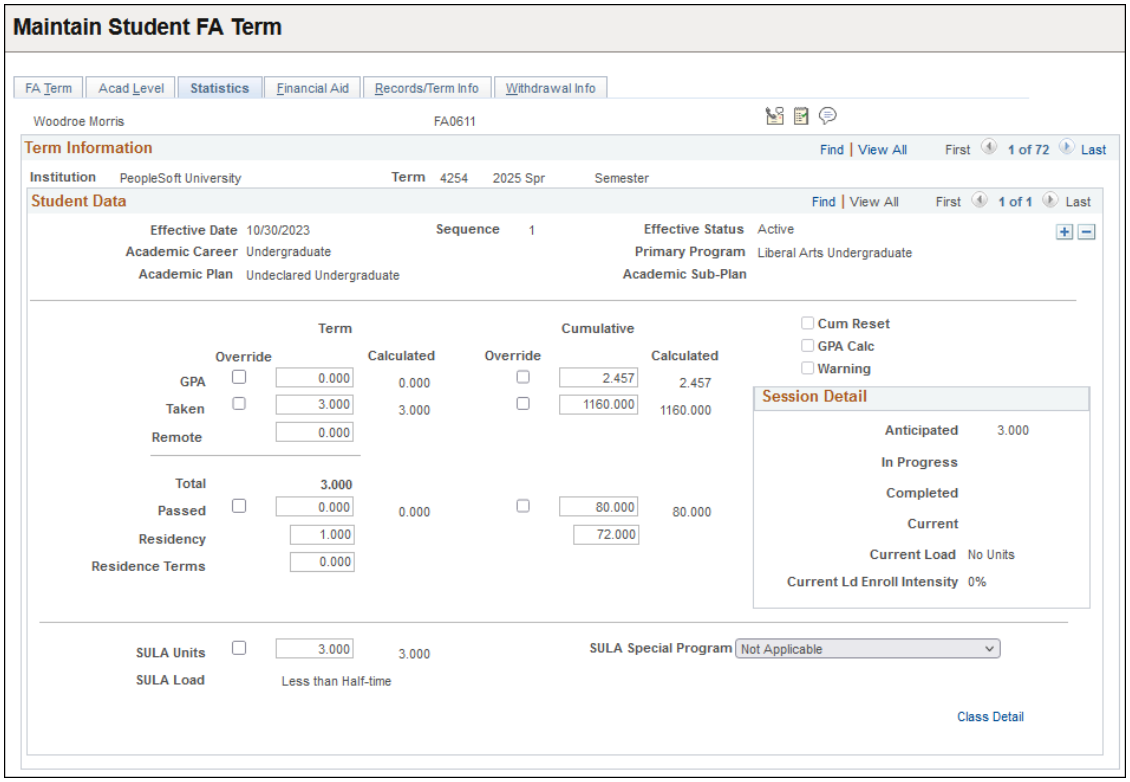
- Student Records: Setting Up Catalog and Schedule Options

Viewing Academic Statistics

Access the Statistics page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Statistics**).

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

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If students have not applied for financial aid in contiguous aid years but have been enrolled in terms in which they did not apply for aid, the system recalculates cumulative statistics (GPA, UNITS TAKEN, UNITS PASSED) from their enrollment data for the first term of the non-contiguous aid year. The system recognizes students as financial aid applicants for an aid year if they are aid year activated. This resolves inaccuracies in the cumulative statistics when students may be continuously enrolled at the school but have not applied for financial aid for all aid years. If no enrollment information exists for the students in terms in which they have not applied for aid, the cumulative statistics calculation remains unchanged.

Student Data

You can override the values in the **GPA - Term, GPA - Cumulative,Taken - Term, Taken - Cumulative, Passed - Term,** and **Passed - Cumulative** fields by entering a new value in each field that differs from the value in the **Calculated Values** column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the **Override Expiration Date** field on the FA Term page.

Field or Control	Description
Override	To activate the **Override** check box for any field, modify the field value so that it differs from the value in the **Calculated Values** column.
GPA - Term	Displays the student's grade point average (GPA) for the term you are viewing. To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column.

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Field or Control	Description
GPA - Cumulative	Displays the student's cumulative GPA, including this term. To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column.
Taken - Term	Displays the number of units taken this term. The value of this field determines the **FA Load** on the FA Term Census Date Locking page. The Tuition Calculation routine also uses this number of units during the Student Budget Assignment process. To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column.
Taken - Cumulative	Displays the total units a student has taken, including this term. To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column.
Remote	Displays units a student is taking concurrently at another institution that are part of a student's unit load for the term. This situation can occur if you have a multi-institution system, and the student takes courses at another institution within the system. Remote units indicate that a student is enrolled at two different campuses.
Total	Displays the total number of units (Taken - Term units plus Remote units) the student is taking this term.
Passed - Term	Indicates the number of units the student completed with a passing grade for the term. The system uses this value to determine the student's projected, start, and end academic levels (displayed on the Acad Level page). The system also uses this value to update the NSLDS loan year. To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column.
Passed - Cumulative	Indicates the cumulative units the student has completed with a passing grade, including units passed this term. This value is used in determining the student's projected, start, and end academic levels (displayed on the Acad Level page). The system also uses this value to update the NSLDS loan year. To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column.
Residency - Term	Indicates the number of units a student has completed in residency at your institution this term.
Residency - Cumulative	Indicates the total number of units a student has completed in residency at your institution.

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Field or Control	Description
Cum Reset (cumulative reset)	If selected, Student Records has reset all the student's cumulative fields to zero for this term. This is usually done to handle academic forgiveness, transfer credits, or consecutive academic careers. This field is informational only and has no effect on Student Records or Financial Aid. However, you may want to contact the student records administrators to determine why the student's cumulative fields have been reset.
GPA Calc (grade point average calculation)	Automatically selected if the FA term build process failed to calculate a GPA for the student. This can happen when a student is enrolled in multiple careers that do not have the same grading scheme—such as concurrent enrollment in undergraduate and graduate careers in a given term. This field is for informational purposes only. However, you may want to determine why the build process was unable to calculate a GPA for the student. **Warning!** The system selects this check box if either the **Cum Reset** or **GPA Calc** check box is selected. This field serves as a flag that your institution can track.
Transfer Credit	The system displays this link only when you have entered transfer credits for the student. Click to access the FA Term Transfer Credits page and view information about the number of transfer credits that a student has.
Other Units	The system displays this link only when the student has more than one academic career associated with more than one financial aid career type. Click to access the FA Term Other Units page and view term statistics for a student's other academic career.
Class Detail	Click to access the FA Term Class Detail page and view a detailed picture of the student's enrollment.

Session Detail

Track a student's progress using units during the session and term. These fields do not affect the calculation of GPA and NSLDS loan year directly, but are accounted for in **Taken - Term, Taken - Cumulative, Passed - Term,** and **Passed - Cumulative** fields.

Field or Control	Description
Anticipated	Displays the number of units the student is enrolled in for classes whose start date is after the effective date.
In Progress	Displays the number of units for classes the student is enrolled in and the effective date is between the class start date and end date.

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Field or Control	Description
Completed	Displays the number of units the student has completed as of the effective date. This field does not track passed courses; it counts the units of all classes whose end dates are earlier than the effective date.
Current	Displays the total number of units the student has completed and is currently enrolled in for the term (sum of in progress and completed units). This allows you to track the total number of units taken for the term regardless of the number of sessions taken.
Current Load	Displays the student's academic load for the term, based on the number of units in the Current field.
Current Ld Enroll Intensity (current load enrollment intensity)	Displays the student's Enrollment Intensity Percentage based on the number of units in the Current field.

SULA Fields

> **Note**
>
> While the official name of this federal statutory requirement is "150 Percent Direct Subsidized Loan Limit", for ease of reference in the system, the acronym "SULA" is used. It is understood that COD defines SULA as "Subsidized Usage Limit Applies" (a flag indicating whether or not a person is subject to a subsidy limit for a Direct Subsidized Loan); however, “SULA” is being used for most things related to "150 Percent Direct Subsidized Loan Limit"

Field or Control	Description
SULA Units	Displays the student's summed number of: • *Anticipated* plus *Current* plus *Remote* units if the **Term Source** is *Term*. • *Taken* plus *Remote* units if **Term Source** is *not Term*. Select the check box to override.
SULA Load	Displays the student’s COD Enrollment Status load based on the number of SULA Units in which the student is enrolled. Note: The SULA Load enrollment ranges are established in SULA Load setup.

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Field or Control	Description
SULA Special Program	Indicates whether the student is pursuing a COD-defined Special Program. Values are: • *2-year Bachelor's Degree* (two-year bachelor's degree) – A bachelor's degree program that requires an associate degree or the successful completion of at least two years of postsecondary coursework as a prerequisite for admission into the program. • *Non-Cred Teacher Cert Pgm* (non-credential teacher certification program) – A program that does not lead to a degree/certificate at an institution but leads to a State credential required for teaching. • *Not Applicable* – Not applicable. • *Prep Crsewk Grad Prof Pgm* (preparatory coursework graduate program) – Enrollment in preparatory coursework necessary for enrollment in a graduate or professional program. • *Prep Crsewk Ugrad Program* (preparatory coursework undergraduate program) – Enrollment in preparatory coursework necessary for enrollment in an undergraduate or professional program. • *Selective Admission Assoc Degree* (selective admission associate degree) – An associate's degree program that: 1. Requires an associate degree or the successful completion of at least two years of postsecondary coursework as a prerequisite for admission. 2. Admits only a selected number of applicants based on additional competitive criteria which may include entrance exam scores, class rank, grade point average, written essays, or recommendation letters. 3. Provides the academic qualifications necessary for a profession that requires licensure or certification by the State in which the coursework is offered. This field can be updated in batch via Population Update. Specify the Student FA Term table's (STDNT_FA_TERM) BIND record SCCPU_FATRM_BND when processing this override in batch. **Note:** SULA Special Program is assigned during Financial Aid Term build using the Academic Plan setup. If the SULA Special Program field is left blank on the Academic Plan setup table and the field is blank on the student's FA Term record, then it is updated on the student's FA Term field is populated in the following ways: 1. FA Term Build (online and batch) populates this field as "Not Applicable". 2. The SULA AE

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Field or Control	Description
	Request process populates this field as "Not Applicable". 3. Manual updates to the FA Term > Statistics page auto-populate this field as "Not Applicable". Of the three conditions specified above, only the FA Term build process records a change in the Audit Table when this field is updated from blank to "Not Applicable". In other words, neither manual updates nor the AE Request routine are recorded in the Audit Table.

Viewing Transfer Credit Information

Access the FA Term Transfer Credits page (click the **Transfer Credit** link on the Statistics page).

Term Values

Field or Control	Description
Transfer	Displays the number of units the student received transfer credit for this term.
TrnPasGPA (transfer passed for GPA)	Displays the number of passed transfer credit units that count towards the student's GPA for this term.
TrnPasNGPA (transfer passed not for GPA)	Displays the number of passed transfer credit units that do not count towards the student's GPA for this term.
Test	Displays the number of units the student has earned by taking tests such as the SAT II or Advanced Placement tests for this term.
Other	Displays the number of units the student has earned from other sources, such as credits for work experience or credits from the ROTC program for this term.

Totals

Field or Control	Description
Transfer	Displays the total number of units from transfer credit the student has.
Test	Displays the total number of units the student has earned by taking tests such as the SAT II or Advanced Placement tests.
Other	Displays the total number of units the student has earned from other sources, such as credits for work experience or credits from the ROTC program.

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Field or Control	Description
Total TC Adjust (total transfer credit adjustment)	Displays the total number of units that the student has earned but does not receive credit for in the system. For example, if your institution has a limit of 100 transfer units, and the student has earned 120 transfer units, this field displays *20* for the 20 units the student does not receive credit for in the system.

Transfer Credit and Financial Aid Term Build

A transfer student's NSLDS loan year, academic level information, GPA, and cumulative units (taken and passed) on the student's financial aid term record depend on the data source and whether the student's transfer credits have been posted in Student Records.

If a transfer student's financial aid term is built with a source of *Admissions,* then the student's academic level information and NSLDS loan year are based on the year (level) at which the student is admitted. The information on the Statistics page, however, reflects only the projected term enrollment information. Only the units that the student is projected to enroll in for the term are used to determine the student's units taken for the term and cumulative units taken.

If the source is *Program* or *Term,* then the student's financial aid term information depends on whether the student's transfer credits have been posted in Student Records. If the student's transfer credits have been posted, then the student's academic level information is determined using the number of transfer units the student has and your institution's level/load rules. The student's NSLDS loan year, in turn, is based on the student's calculated academic level. The cumulative values on the Statistics page include the transfer credits. In other words, the build process derives the student's financial aid term data using the transfer credit as if it were units taken in the past at your institution.

In contrast, if the source is *Program* or *Term* and transfer credit has not been posted, the student's NSLDS loan year, academic level information, GPA, and cumulative units (taken and passed) on the student's financial aid term record do not reflect the transfer credits. Consequently, the student is built as a freshman for the starting academic level and NSLDS loan year (because the NSLDS loan year is calculated from the academic level). The values on the Statistics page include information for the current term only.

Related Topics

- Student Records: Understanding the Transfer Credit Business Process

Viewing Term Statistics for a Student's Other Career

Access the FA Term Other Units page (click the **Other Units** link on the Statistics page).

Students have another academic career when they have more than one academic career associated with more than one financial aid career type. The term statistics for the academic career with the lower primacy number (or higher priority) is displayed on the Statistics page. The term statistics for the career with the higher primacy number (or lower priority) appears on this page. You can use this information to adjust a student's award package manually based on these units taken.

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> **Note**
>
> The data on the FA Term Other Units page does not carry forward to other terms unless multiple financial aid career types for other terms exist

Field or Control	Description
Other FA Taken and **Other FA Passd** (other FA passed)	Displays units taken and units passed for the other academic career for the term.
Other Grade Pts (other grade points)	Displays grade points for the other academic career for the term.
Other Taken GPA	Displays the units considered toward the GPA for the other academic career for the term.

Viewing a List of the Student's Classes

Access the FA Term Class Detail page (click the **Class Detail** link on the Statistics page).

> **Note**
>
> The data appearing on this page changes depending on the effective-dated row and enrollment changes from Student Records.

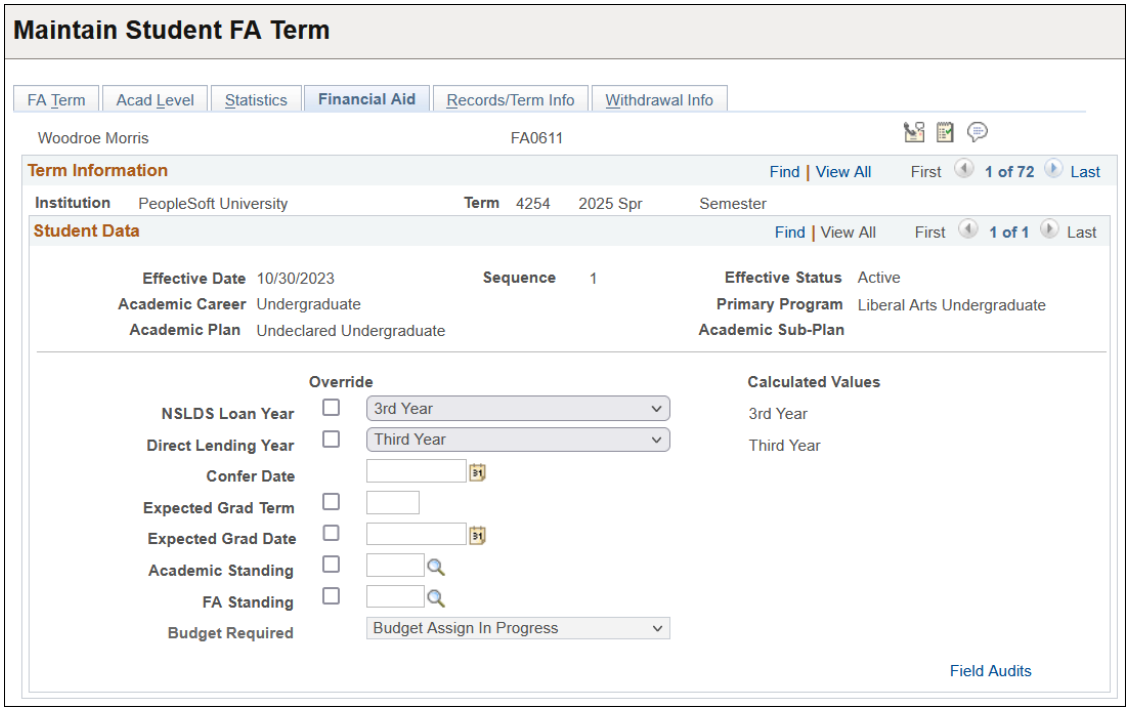
Field or Control	Description
Enrolled in OEE Courses (enrolled in open entry/exit courses)	Indicates whether the student is enrolled in one or more Open Entry/Open Exit sessions.
Class Nbr (class number)	Displays the class's unique identifier, assigned in Student Records.
FA Taken	Displays the number of financial aid eligible units the class is worth.
Start Date and **End Date**	Displays the start and end dates for the class.
OEE (open entry/exit)	Indicates whether the class is an Open Entry/ Open Exit session. This information comes from Student Records and determines the value of the Enrolled in OEE Courses field.

Viewing Loan, Graduation, and Budget Information

Access the Financial Aid Info page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Financial Aid**).

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

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You can override the values in the **NSLDS Loan Year, Direct Lending Year, Expected Grad Term, Expected Grad Date, Academic Standing,** and **FA Standing** fields by entering a new value in each field that differs from the value in the **Calculated Values** column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you need only to override the fields until a certain date within the term, use the **Override Expiration Date** field on the FA Term page.

Field or Control	Description
NSLDS Loan Year	To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column. The system calculates the student's NSLDS loan year by comparing the student's cumulative units passed against the Academic Level table. It uses this value in awarding to determine level limit rules attached to a specific financial aid item type. The system also uses this field in the Loan Process routine to determine the student's loan level aggregate. The NSLDS loan year selections are translate values based on the financial aid level. Values include: *1st Year - Never Attended, 1st Year - Previously Attended, 1st Year Graduate, 2nd Year, 2nd Year Graduate, 3rd Year, 3rd Year Graduate, 4th Year, 4th or more Graduate, 5th Year+* and *Graduate/Professional.*

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Field or Control	Description
Direct Lending Year	To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column. The system determines the direct lending year the same way it determines the NSLDS loan year. When the system creates direct lending origination files, it populates the Student's College Grade Level with the information from this field. Correct the value in this field as required by direct lending reporting requirements. Values include: *Fifth Year+ Undergrad* (fifth year plus undergraduate), *First Year, never attended*, *First Year, previously attnd* (first year, previously attended), *First Yr, Grad/Prof* (first year graduate/professional), *Fourth Year*, *Fourth Yr+*, *Grad/Prof* (fourth year plus, graduate professional), *Third Year* or *Third Yr, Grad/Prof.*
Confer Date	Enter or view the confer date of the student's degree if the student graduates in the displayed term. This date corresponds with the term end date found on the Term Table.
Expected Grad Term (expected graduation term)	To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column. The system uses this value for loan processing. If available, the system uses the Student Records value or the PeopleSoft Recruiting and Admissions value. When you build terms in projection, the build process does not build terms after the expected term of graduation, unless the student is going into another career after graduation. The student's expected graduation term is a loan validation field edit. This means that if the expected graduation date has passed, the Loan Validation routine prevents loan origination. If a value exists for this field, it automatically appears when you create the student's loan origination application. The field can be updated online in the loan origination pages when processing the student's loan application.

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Field or Control	Description
Expected Grad Date (expected graduation date)	To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column. Enter or view the date the student is expected to graduate. The system uses the expected graduation date for loan processing. If available, the system uses the Student Records value. The loan origination process projects a graduation date if the field is blank. The Loan Validation Field Edit routine checks for this value. If a value exists for this field, it automatically appears in the **Program Completion Dt** (program completion date) field on the Loan Origination 2 page when you create the student's loan origination application. You can update the field online in the loan origination pages when processing the student's loan application. In CommonLine loan processing, it is important for the expected grad date not to occur before the end of the student's loan period. The loan is rejected by the loan servicer as a result. A loan validation edit is provided to identify invalid graduation dates. **Note:** It is important that the academic departments, the financial aid office, other administrative departments, and the student agree on the student's graduation term and date. Errors in these dates can have serious consequences for a student's loan eligibility and repayment periods.
Academic Standing	To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column. This value is based on meeting your institution's academic progress guidelines. You can create these values on the Academic Standing Table page in Student Records and set them up as action codes. You can created values for dismissed, good standing, probation, or warning statuses, and you can create multiple codes for the same status. For example, a student could receive two warnings (WRN2) before being placed on probation. The financial aid term build process populates this field only if academic standing data exists for the student in Student Records. This field is not used for financial aid processing, but you can use it in formulas or equations to select students.

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Field or Control	Description
FA Standing (financial aid standing)	To activate the override check box, modify the field value so that it differs from the value in the **Calculated Values** column. You create and maintain action codes on the Academic Standing Table page in Student Records. Your financial aid office can assign a code for the selected term to establish a student's financial aid status for a locally defined business process. This field is set manually and is not used by delivered financial aid processes.
Budget Required	Indicates whether a student has an assigned budget or needs a budget posted. The value in this field determines whether the student is evaluated during the Budget Assignment process. Values include: *Assgn Bdgt* (assign budget): The student should be selected during the Budget Assignment process. Whenever you build or rebuild a term, the field is automatically updated with this value. *In Prgres* (in progress): The assignment of a budget is currently in progress for this student. The field is automatically updated to this value when a student has been selected for the budget assignment process. *Error:* An error occurred during the Budget Assignment process. *No Assign:* The system does not select the student during the Budget Assignment process. The field is automatically updated to this value when the student's budget is posted by the Student Budget Assign – Move (FAPBDGTM) process. The census date locking functionality also causes this value to be assigned after the census date has passed and the lock has been invoked.
Field Audits	Click to access the FA Term Field Audits page and monitor changes in a student's financial aid term information from the previous effective-dated row. You must select the **Audit FA Term Build** check box on the Financial Aid Defaults page to view changes to the student's financial aid term on the FA Term Field Audits page. If you do not select this check box, the system does not record changes in the student's record to the audit table; a new effective-dated row is still built every time that a change occurs in one of the audited fields.

Related Topics

- Student Records: Tracking Academic Standing

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Viewing Changes in a Student's FA Term Information

Access the FA Term Field Audits page (click the **Field Audits** link on the Financial Aid Info page).

Monitor changes made by the FA Term Build background process or by the FA Term Online Build process. The Online Build process is performed when you click the **Build** button on the FA Term page.

If a change occurs in one of the following fields, the FA Term Build background process or the FA Term Online Build process creates a new effective-dated row and enters the old and new value on the FA Term Field Audits page. You can create your own reports using the audit data provided on the page. The audited fields are:

Audit Fields		
ACAD_CAREER	CUR_RESIDENT_TERMS	SFA_ASG_WI_CUM_BOT
ACAD_LEVEL_BOT	EXP_GRAD_TERM	SFA_ASG_WI_CUM_EOT
ACAD_LEVEL_EOT	FA_LOAD	SFA_ASG_UNITS_BOT
ACAD_LEVEL_PROJ	FA_LOAD_CURRENT	SFA_ASG_UNITS_EOT
ACAD_PLAN	FA_NUMBER_OF_WEEKS	SFA_ASG_WI_TCR
ACAD_PLAN_TYPE	FA_REBUILD_DT	SFA_ASG_WI_TRM
ACAD_PROG_PRIMARY	FA_UNIT_ANTIC	STUDY _AGREMENT
ACAD_SUB_PLAN	FA_UNIT_COMPLETED	TERM_SRC
ACADEMIC_LOAD	FA_UNIT_CURRENT	TOT_PASSD_FA
ADMIT_TERM	FA_UNIT_IN_PROG	TOT_TAKEN_FA
CAMPUS	FORM_OF_STUDY	UNT_PASSD_FA
COURSE_LD_PCT	LS_GPA	UNT_TAKEN_FA
CUM_GPA	SFA_ASG_AC_LVL_BOT	WEEKS_OF_INSTRUCT
CUM_RESIDENT_TERMS	SFA_ASG_AC_LVL_EOT	WITHDRAW_CODE

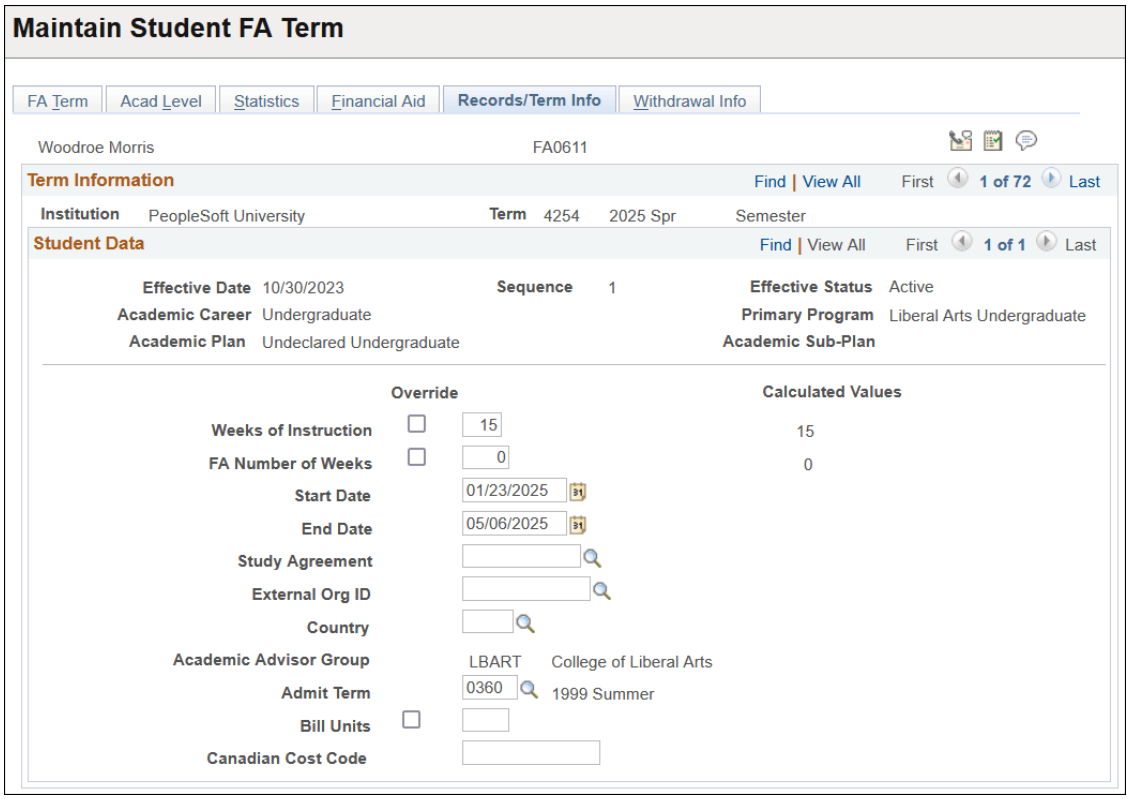
Field or Control	Description
Field Name	Displays the name of the field with the changed value.
Old Value	Displays the value of the field before the change, listed on the previous effective-dated row.
New Value	Displays the value of the field after the change, listed on the current effective-dated row.
User ID	Displays the ID of the user who processed the change.
Online/Batch	Indicates whether the change was made in batch or online.
Process Instance	Displays the process instance for the background process that changed the field. If the change was made online, this field is blank.

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Viewing Student Records Term Information

Access the Records/Term Info page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Records/Term Info**).

This example illustrates the fields and controls on the Records/Term Info page. You can find definitions for the fields and controls later on this page.



This page is intended for collecting study abroad or institutional visit information from Student Records and entering Canadian cost code information. Information on this page can be changed for financial aid purposes without any effect on Student Records data in your system.

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Field or Control	Description
Weeks of Instruction	Displays a calculated value built when the term is built with a source of Term. The build process adds the number of weeks of the different session start and end dates for all classes the student is enrolled (taking into consideration any overlap in enrollment). For Open Entry/Open Exit courses, where the start and end dates for the student's classes are expected to be different, the start and end dates of these courses are used in place of the session dates. If the term is built with projected data, then the build process populates this field with data from the FA Term Setup page. If multiple sessions exist for a term, the build process looks for a default session. If a default session is defined, the build process uses the weeks of instruction from the default session. If no default session exists, the build process uses the weeks of instruction from the regular academic session. If the **Weeks of Instruction** field is modified, the **Override** check box is automatically populated. The calculated value continues to be displayed under **Calculated Values**. **Note:** If the **Override Expiration Date** functionality is enforced for the term, the **Weeks of Instruction** is reset with the calculated value past that date. **Note:** If the **Term Source** is set to *No Data*, the override is cleared and the **Weeks of Instruction** is reset to zero.
FA Number of Weeks (financial aid number of weeks)	Displays the value from the Cost Code Setup that is used for Canadian loans. If the **FA Number of Weeks** field is modified, the **Override** (override) check box is automatically populated. The value from the Cost Code Setup continues to be displayed under **Calculated Values**. **Note:** If the **Override Expiration Date** functionality is enforced for the term, the **FA Number of Weeks** is reset with the calculated value past that date. **Note:** If the **Term Source** is set to *No Data*, the override is cleared and the **FA Number of Weeks** is reset to the calculated value.
Start Date and **End Date**	Displays the beginning date and ending date of the term. If the student is enrolled in a single session, the start date is the term start date. If the student is enrolled in multiple sessions, the start date is the earliest session start date of the classes the student is enrolled in. The end date comes from the Term Table.

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Field or Control	Description
Study Agreement	This value is derived from Student Records. The values in this field may include Study Abroad programs or programs sponsored by other external organizations.
External Org ID (external organization ID)	This value is derived from Student Records. Select the appropriate ID to associate with the study agreement.
Country	This value is derived from Student Records. Select the appropriate country to associate with the study agreement and external organization.
Academic Advisor Group	This value is derived from the **Academic Group** field in the Academic Program Table in Student Records. It indicates the school within the institution. Examples of an academic group are College of Fine Arts, School of Medicine, or Continuing Education. The build process inserts a value into this field only if a value exists in the **Academic Group** field; otherwise, it leaves this field blank.
Admit Term	The term the student was admitted to the primary program. If the student has switched primary programs since he or she was admitted, then the admit term displays the term that the student switched programs.
Bill Units (billing units)	This value is derived from Student Financials. You can override the Billing process by selecting the **Override** check box. You can then enter the number of billing units you want to use for the student. This field is for informational purposes only.
Override Billing Units	Select this check box to override the Billing process. After you select this check box, you can enter a new value in the **Bill Units** field.
Canadian Cost Code	(CAN) Used by Canadian institutions only. The FA Term process populates this value, based on the number of weeks of financial aid and the student's career, program, and year in school. You set up your institution's cost codes on the Cost Code Setup page. Canadian institutions use cost codes to report financial aid calendars, length of financial aid award periods, and cost of attendance information to the Canada Student Loan program.

Viewing Withdrawal Information

Access the Withdrawal Info page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Withdrawal Information**, and then **Withdrawal Info**).

Student Records processes student withdrawals, collecting information about the type of withdrawal, the reason for the withdrawal, and the last date the student attended class. Student Financials uses this information to calculate whether the student should receive a refund and posts these calculations. This page displays information from Student Records and Student Financials that may affect financial aid processing, such as return of Title IV funds.

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Field or Control	Description
Refund Percentage	Tuition calculation only posts if a student receives federal financial aid and financial aid has been posted to the student's account. This value is posted if a tuition calculation has occurred. The refund percentage is based upon the date of the student's withdrawal.
Refund Scheme	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account. The refund scheme is based upon the adjustment used.
Refund Classification	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account.
Refund SetID	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account.
Service Indicator Code	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account. Shows a service indicator set by Student Financials to state the need for financial aid to adjust the student's aid and release a hold.
Service Indicator Date Time	Tuition calculation only posts if a student receives federal financial aid and financial aid has been posted to the student's account. The date and time the service indicator was set.

Viewing One Big Beautiful Bill (OB3) Information

Access the OB3 Info page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **OB3 Info**).

For aid years 2026 and later, FA Term uses enrollment-based units and academic plan setup to populate OB3-related fields on the OB3 page.

Fields or Controls	Description
Units Loan Limit Percent FA	Displays the number of units used to determine the students OB3 loan limit percentage. For AY2026 and later, FA Term derives this value from the student's financial aid units plus remote units. The field can be overridden when institutional adjustments are needed manually or via Population Update.

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Fields or Controls	Description
Term Loan Limit Percent	Displays the loan limit percentage for the individual term. FA Term determines this value by comparing the student's Units Loan Limit Percent FA for the term to the number of units the institution defines as full-time based on the number of units required for full-time enrollment for the regular term category.. The field can be overridden when institutional adjustments are needed manually or via Population Update.
Annual LLP	Displays the annual loan limit percentage for the student's aid year and career. FA Term determines this value by summing the Units Loan Limit Percent FA across active terms in the aid year for the career and comparing that total to the number of units considered full-time for the academic year, based on the academic plan setup and number of terms in the academic year. The number of units required for full-time enrollment for the academic year is determined using the regular term category definition of full time enrollment, multiplied by the required number of terms. The field can be overridden when institutional adjustments are needed manually or via Population Update.
OB3 Classification for Professionals Flag	Indicates whether the student's academic plan is classified as a professional program for OB3 financial aid processing. FA Term derives this value from Academic Plan setup and it is read-only.
CIP Code	Displays the CIP Code associated with the student's academic plan. FA Term derives this value from Academic Plan setup and displays it as read-only; if no CIP Code is defined for the academic plan, the field remains blank.
OB3 Legacy Eligible Flag	Indicates whether the student is treated as legacy for OB3 financial aid awarding under the grandfathering provision. This defaults to 'No' when the FA Term row is built and can be updated by the institution manually or via Population Update.
OB3 Use Professional Lifetime Flag	Indicates whether professional lifetime loan limits should be used for the student under OB3 financial aid awarding. This field is applicable only for students that are identified as graduate based on their NSLDS Loan Year value. This field defaults to 'No' when the FA Term row is built and can be updated by the institution manually or via Population Update.

Building Financial Aid Terms Manually

After you have completed the setup steps, you can choose to run the FA Term build process manually. Go to the FA Term page and click the Build button.

Building Financial Aid Terms in Batch

This section provides an overview of building financial aid terms in batch and discusses how to:

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- Create FA Term driver records.
- Create financial aid terms in batch.

Understanding Building Financial Aid Terms in Batch

Running the batch financial aid term build process is a two-step process. You must:

- Create an FA Term driver record to identify the students for which to build financial aid terms. This process selects students using institution, aid year, and career as criteria and inserts the IDs of these students into a worktable.
- After students have been selected, you run the FA Term Build process (FAPTRMU1) to create financial aid terms for the students in the worktable. You must remember to enter the same institution and aid year on this page as you did for the FA Term driver record.

Pages Used to Build Financial Aid Terms in Batch

Page Name	Definition Name	Navigation	Usage
Create FA Term Driver Records	RUNCTL_FAPTRMU1SQR	**Financial Aid**, and then **Financial Aid Term**, and then **Create FA Term Driver Recs**, and then **Create FA Term Driver Records**	Create FA Term driver records for the batch Financial Aid Term build process.
Build FA Terms	RUNCTL_FAPTRMU1CBL	**Financial Aid**, and then **Financial Aid Term**, and then **Build FA Terms in Batch**, and then **Build FA Terms**	Create Financial Aid Terms in batch.

Creating FA Term Driver Records

Access the Create FA Term Driver Records page (**Financial Aid**, and then **Financial Aid Term**, and then **Create FA Term Driver Recs**, and then **Create FA Term Driver Records**).

The **Process Name** field displays the name of the process that creates driver records.

Driver Creation Options

Choose the type of terms you want the batch financial aid term build process to build or rebuild.

Field or Control	Description
Both Updates and Projections	Select if you want to build or rebuild terms the student is currently enrolled for as well as terms with projected enrollment information. This means that all terms in the aid year are built (in projection if necessary), regardless if the student has been term activated for the term.

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Field or Control	Description
Update Only	Select if you want to build or rebuild only terms for which the student is currently enrolled. This means only those terms for which the student has enrollment data.

Other Page Elements

Field or Control	Description
Academic Career	After you select an academic institution and aid year, a list of careers associated with this aid year on the FA Term Setup page appears in this column. Select the check boxes next to the careers for which you want to run the batch financial aid term build process.
Rebuild Projections	Select to indicate that the financial aid term build process should rebuild projected terms—as well as terms built with enrollment data—using current data. Use this check box to rebuild projections when a change occurs in career or program. You do not have to select this check box to have terms with updates rebuilt, because the build process automatically rebuilds terms with updates. You can choose whether you want to rebuild projections for each career. Even if selected, terms are not built in projection after the census date if you activate the census date lock.
Run	Run the Create Drivers Recs For FA Trm (create driver records for financial aid term) process (FAPTRMU1) when you are ready to create Driver Records.

Creating Financial Aid Terms in Batch

Access the Build FA Terms page (**Financial Aid**, and then **Financial Aid Term**, and then **Build FA Terms in Batch**, and then **Build FA Terms**).

The **Academic Institution** and **Aid Year** you select on this page must match the Academic Institution and Aid Year combination on a driver record for which you have run the Create Drivers Recs For FA Trm (create driver records for financial aid term) process (FAPTRMU1).

Field or Control	Description
Commit Level	After you enter an **Academic Institution,** the default institutional commit level, established on the Financial Aid Defaults page, displays. This is the number of records that are processed before the system issues a commit or a save to the database. If your session ends abnormally, this is the maximum number of records that would be lost. For example, if you set the **Commit Level** to *10,* and an error occurs on the fifteenth student, the system retains the information on the first 10 students.

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Field or Control	Description
Driver Creation Option	Used to ensure that the records processed are the same as those selected by the last FA Term driver creation process. This should be set to match the last Create FA Term Driver Records run control setting.
Print Detailed Messages	Select to have the COBOL log contain information on why a student's financial aid term was built or rebuilt.
Run	Run the FA Term Build process (FAPTRMU1) when you are ready to create financial aid terms in batch.

Using the Financial Aid Term Census Report

The Financial Aid Term Census Report identifies those students with award balances for the specified term, which can be an offered amount, authorized amount, or disbursed amount greater than zero. If you use census dates to lock enrollment data, run the report after running the FA Term build following the census date. This updates any non-enrolled students to a term source of *No Data*. Students listed on the report are potential candidates for repackaging and/or reversal of funds.

This section discusses how to identify students not enrolled after census with award balances.

Page Used to Identify Students Not Enrolled After Census with Award Balances

Page Name	Definition Name	Navigation	Usage
Students Not Enrolled After Census with Award Balances	RUNCNTOL_FATRMAWD	**Financial Aid**, and then **Financial Aid Term**, and then **FA Term Census Report**, and then **Students Not Enrolled After Census with Award Balances**	Identify those students not enrolled for a term after the census data who have an award balance.

Identifying Students Not Enrolled After Census with Award Balances

Access the Students Not Enrolled After Census with Award Balances page (**Financial Aid**, and then **Financial Aid Term**, and then **FA Term Census Report**, and then **Students Not Enrolled After Census with Award Balances**).

Field or Control	Description
Academic Institution	Academic institution used to generate the report.

Field or Control	Description
Term	Term used to generate the report.

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Field or Control	Description
FA Term Effective Status	Effective status for the selected term, which can be *Active* (default) or *Inactive.*

Updating Financial Aid Progress Units

The Update FA Progress Units process updates the FA Progress Units field on the Student Enrollment record in Records and Enrollment. Specifically, this process:

1. Updates the Unit Progress FA and Grade Points FA fields on the Student Enrollment record.
2. Updates additional fields on the Student Enrollment record: Operator ID, Last update date, Last update time, and sets the Last Source Enrollment Update equal to "FA".
3. Triggers an automatic statistics recalculation to FA fields on both the Student Career Term and Student Session records for the enrollment term.
4. Triggers an automatic cumulative statistics recalculation to FA fields on the Student Career Term record for all forward terms in which Reset Cumulative Stats is not enabled.
5. Activates the Tuition Calculation and the FA Statistics Calculation Required flags on the Student Career Term record for the enrollment term.
6. Triggers SAIP events, if enabled.

> **Note**
>
> After running the Update FA Progress Units process, you should rebuild FA Term records to incorporate the cascading changes made to FA Progress Units.

Page Used to Update Financial Aid Progress Units

Page Name	Definition Name	Navigation	Usage
Update FA Progress Units	SFA_RUN_FAUNTUPD	**Financial Aid**, and then **Financial Aid Term**, and then **Update FA Progress Units**, and then **Update FA Progress Units**	Update Financial Aid Progress Units in Student Records.

Updating Financial Aid Progress Units

Access the Update FA Progress Units page (**Financial Aid**, and then **Financial Aid Term**, and then **Update FA Progress Units**, and then **Update FA Progress Units**).

This page uses the Population Selection feature. For more information on Population Selection,

See Campus Community Fundamentals: Using the Population Selection Process.

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> **Note**
>
> All Selection Tool options for Population Selection data input (External File, Query, Equation Engine) must include ID, Academic Career, Institution, Term, and Class Number to update the FA Progress Units correctly.

Field or Control	Description
FA Progress Units	Enter the value to which you want Financial Aid Progress Units updated for the selected population.

See Student Records: Understanding Class Enrollment Processing.

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20

Working with Student Budgets

Understanding Student Budgets

At the beginning of the processing year, you create budgets detailing the cost of attendance (COA) for each term a student is enrolled. The COA is an estimate of a student's educational expenses for the period of enrollment. The budget helps establish a student's need COA minus the student's expected family contribution, which permits the financial aid office to award need-based aid.

This section discusses budget calculations.

Budget Calculations

After you complete budget setup, you calculate student budgets, either in batch, online, for an individual using batch rules, or manually. Use batch background budget assignment when you have large numbers of students to process. You can run this process overnight. For a small number of students, create a budget online using the Create Student Budgets page and use the same rules as batch background budget assignment. To skip budget rules, use the Student Budget Maintenance page to build budgets manually or to override an existing budget.

Common Elements Used in Student Budgets

Field or Control	Description
Inst COA (institutional cost of attendance)	Indicates the sum of all budget items assigned to this budget group that have an item class of federal or institutional. The Packaging routine uses this COA during awarding if you designate institutional methodology as the packaging methodology at the financial aid item type level.
Fed COA (federal cost of attendance)	Indicates the sum of all budget items assigned to this budget group that have an item class of federal. The Packaging routine uses this COA during awarding if you designate federal methodology as the packaging methodology at the financial aid item type level.
Pell COA (Pell cost of attendance)	Indicates the sum of Pell amounts from the budget items assigned to this budget group. The Packaging routine uses this COA when awarding Pell Grants.
Pell LTHT COA (Pell less than half-time cost of attendance)	Indicates the sum of Pell less than half-time amounts from the budget items assigned to this budget group. The Packaging routine uses this COA when awarding Pell Grants.
Item Class	Indicates whether you use the budget item for calculating federal or institutional budgets.

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Assigning Budgets in Batch

Use batch budget assignment to create student budgets using defined budget assignment rules. Batch budget assignment builds budgets term by term because certain budget categories, such as fees, do not apply to all terms. Budgets are only built for students who have Financial Aid Terms built, and only for those terms for which the **Budget Required** field is set to *Assgn Bdgt* (assign budget).

This section lists prerequisites and discusses how to:

- Select students for batch budget assignment.
- View batch student budget review.
- Process equations to determine budget amounts.
- Process formulas to determine budget amounts.
- Process trees and tuition.
- Move student budgets.
- Maintain budget tables.
- Apply Pell adjustments.

Prerequisites

To use batch budget assignment, you must first create a budget run control for the combination of institution and aid year that you want to process.

Related Topics

- Creating Budget Assignment Run Controls
  Access the Create Budget Run Controls page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Assignment Run Control**, and then **Create Budget Run Controls).**

Pages Used to Assign Budgets in Batch

Page Name	Definition Name	Navigation	Usage
Batch Budget Assignment - Select Students	RUNCTL_FABUDGET1	**Financial Aid**, and then **Assign Budgets**, and then **Select Students**, and then **Batch Budget Assignment - Select Students**	Select students for whom the **Budget Required** field is set to *Assgn Bdgt* on the Financial Aid Info page for the careers and terms you selected on the Create Budget Run Controls page.
Batch Student Budget Review	STDNT_BUDGET_ASGN	**Financial Aid**, and then **Budgets**, and then **View Batch Budget Details**, and then **Batch Student Budget Review**	View the results of the Student Budget Assign processes (FAPBDGTS, FAPBDGTF, FAPBDGTT, and FAPBDGTM).

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Page Name	Definition Name	Navigation	Usage
Budget Term Detail	STDNT_BDG_DTL2_SEC	Click the **Term Detail** link on the Batch Student Budget Review page or the View Term Detail page.	View additional information from the student's Financial Aid Term record.
Student Budget Messages	STDNT_BDG_MSGB_SEC	Click the **Message** link on the Batch Student Budget Review page or the Create Student Budget page.	View messages generated during the budget assignment process.
Student Budget Message Detail	STDNT_BDG_DTLB_SEC	Click the **Detail** link on the Student Budget Messages page.	View the message number and additional explanation of a student budget message.
Budget Enrollment Detail	STDNT_BDG_DTL3_SEC	Click the **Enrollment Detail** link on the Batch Student Budget Review page.	View student enrollment plans and sports participation information for the aid year.
Batch Budget Assignment - Process Equations	RUNCTL_FABUDGETEQ	**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Process Formula**, and then **Batch Budget Assignment - Process Equations**	Assign budget items and amounts for the budget categories assigned to students by the Stdnt Bdgt Assign - Select process (FAPBDGTS). Only used for budget categories that have a processing rule of Equation.
Batch Budget Assignment - Process Formulas	RUNCTL_FABUDGET2	**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Process Formula**, and then **Batch Budget Assignment - Process Formulas**	Assign budget items and amounts for the budget categories assigned to students by the Stdnt Bdgt Assign - Select process (FAPBDGTS). Only used for budget categories that have a processing rule of Formula.
Batch Budget Assignment - Process Trees and Tuition Calcs (batch budget assignment - process trees and tuition calculations)	RUNCTL_FABUDGET3	**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Process Tuition**, and then **Batch Budget Assignment - Process Trees and Tuition Calcs**	Assign budget items and amounts for the budget categories assigned to students by the Stdnt Bdgt Assign - Select process (FAPBDGTS). Only used for budget categories that have a processing rule of Tuition or Tree.

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Page Name	Definition Name	Navigation	Usage
Batch Budget Assignment - Move Budgets	RUNCTL_FABUDGET4	**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Move Budget to Students**, and then **Batch Budget Assignment - Move Budgets**	Move budget results to the student's budget record with an effective-dated row.
Batch Budget Assignment - Table Maintenance	RUNCTL_FABUDGET5	**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Maintain Budget Work Table**, and then **Batch Budget Assignment - Table Maintenance**	Delete students from the budget work table and reset the **Budget Required** flag on the Financial Aid Info page in the Financial Aid Term component.
Pell Budget Adjustment	RUNCTL_FAPPBGTB	**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Adjust Pell Budgets in Batch**, and then **Pell Budget Adjustment**	Calculate the annual Pell budget for budget categories that count towards the Pell COA.

Selecting Students for Batch Budget Assignment

Access the Batch Budget Assignment - Select Students page (**Financial Aid**, and then **Assign Budgets**, and then **Select Students**, and then **Batch Budget Assignment - Select Students**).

Enter the institution and aid year for which you want to assign budgets. When you move out of the **Aid Year** field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.

Run the Stdnt Bdgt Assign - Select (student budget assignment - select) process (FAPBDGTS) when you are ready to select students.

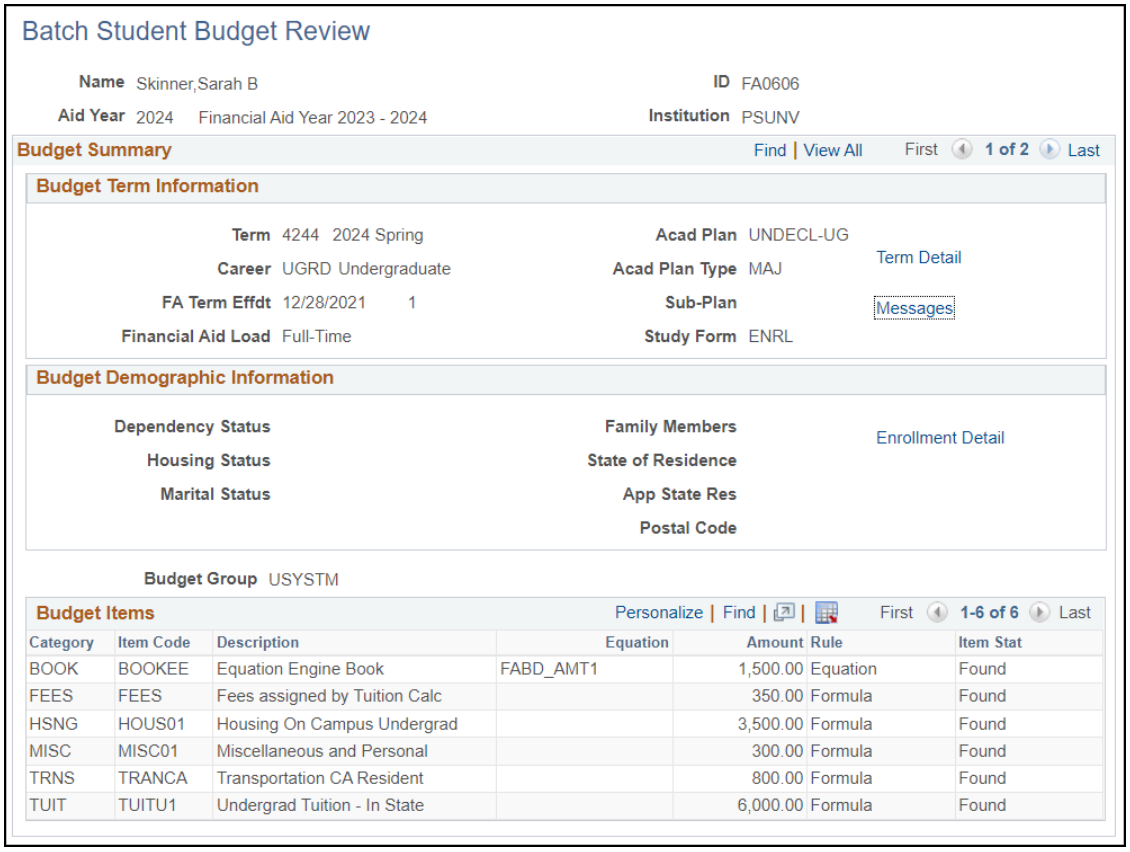
After running the process, use the Batch Student Budget Review page to ensure that the correct budget categories were selected for the student and that the correct student population was selected during the batch.

Viewing Batch Student Budget Review

Access the Batch Student Budget Review page (**Financial Aid**, and then **Budgets**, and then **View Batch Budget Details**, and then **Batch Student Budget Review**).

This example illustrates the fields and controls on the Batch Student Budget Review page. You can find definitions for the fields and controls later on this page.

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Use this page to view and confirm information after running these budget batch processes:

> **Note**
>
> The information that you view here is in a work table, so, after you run a process, this page may be blank depending on the Table Maintenance options that you set.

- After running the Stdnt Bdgt Assign - Select process (FAPBDGTS), use this page to ensure that the correct budget categories were selected for the student and that the correct student population was selected during the batch.
- After running the Stdnt Bdgt Assign - Equations process (FAPBDGTE), use this page to ensure that the budget item amount is accurate for those budget items determined by equation.
- After running the Stdnt Bdgt Assign - Formulas process (FAPBDGTF), use this page to ensure that the budget item amount is accurate based on the budget formula assigned.
- After running the Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT), use this page to ensure that the budget item amount is accurate for those budget items determined by either tuition calculation or budget trees.
- After running the Stdnt Bdgt Assign - Move process (FAPBDGTM), student budgets, use this page to ensure that the budget item is moved successfully during the batch.

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Budget Term Information

Field or Control	Description
Acad Plan Type (academic plan type)	Displays the type of the academic plan. Values include: *Honors, Major, ROTC,* and *Concentration.*
FA Term Effdt (financial aid term effective date)	Displays the effective date and effective sequence of the Financial Aid Term information used to build the budget.
Financial Aid Load	Displays the student's load, determined using the number of financial aid eligible units and level/load rules.
Study Form	Displays the type of study the student is engaged in. Values include: *Detached, Enrollment, Abroad,* and *Candidacy.*
Term Detail	Click to access the Budget Term Detail page and view additional information from the student's Financial Aid Term record. You can check for information that can cause errors using this page.
Messages	Click to access the Student Budget Messages page and view error messages generated during budget assignment.

Budget Demographic Information

Field or Control	Description
Family Members	Displays the number of people in the student's family, as reported on the student's application (ISIR, Profile, Institutional Application).
Housing Status	Displays the student's housing type: on campus, off campus, with relatives, or with parents.
App State Res (application state of residence)	Displays the student's state of residence, as reported on the student's application.
Enrollment Detail	Click to access the Budget Enrollment Detail page and view the student's enrollment plans and sports participation information for the aid year. You can check for information that can cause errors using this page.

Budget Item Information

The amount of budget information that appears on this page depends on the number of budget assignment processes you have run. This table lists the processes:

Process	Fields With Data
Stdnt Bdgt Assign - Select process (FAPBDGTS)	Category, Rule, and Status
Stdnt Bdgt Assign - Equations process (FAPBDGTE)	For budget categories with an equation processing rule: Category, Item Code, Description, Amount, Rule, Status.

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Process	Fields With Data
Stdnt Bdgt Assign - Formulas process (FAPBDGTF)	For budget categories with a formula processing rule: Category, Item Code, Description, Amount, Rule, and Status For budget categories with a tuition or tree processing rule: Category, Rule, and Status
Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT)	Category, Item Code, Description, Amount, Rule, and Status
Stdnt Bdgt Assign - Move process (FAPBDGTM)	Category, Item Code, Description, Amount, Rule, and Status

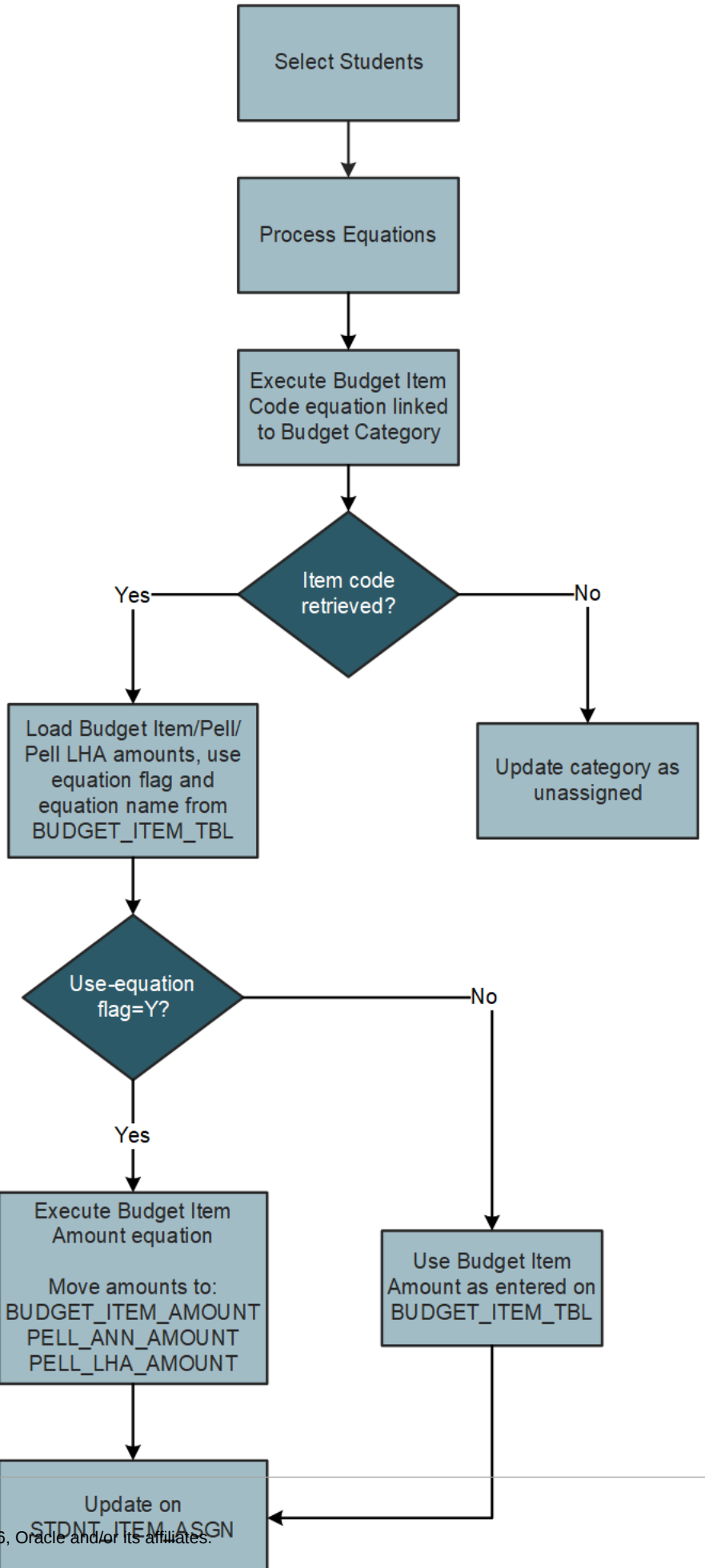
Field or Control	Description
Budget Group	Identifies the generic budget group used for the batch.
Equation	Displays the amount equation used to determine the amount.
Rule	Indicates whether the budget assignment process uses a formula, tree, equation, or other assigned possibilities—such as tuition calculations—to determine the amount assigned to the student for this budget category.
Item Stat (item status)	Select one of these values: *Found:* The budget assignment process was able to use the indicated rule to assign a budget item and amount to the student for the budget category. *Moved:* The budget amount has been moved to the student's record. *Selected:* This budget category has been selected for processing during the Stdnt Bdgt Assign - Formulas process (FAPBDGTF) or the Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT). *Warning:* The Stdnt Bdgt Assign - Formulas process (FAPBDGTF) or the Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT) could not assign a budget item and amount for this budget category to the student.

Processing Equations

Access the Batch Budget Assignment - Process Equations page (**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Process Formula**, and then **Batch Budget Assignment - Process Equations**).

Budget Assignment Using Equations

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This process passes the following fields, which are also key fields on STNDT_BDGT_ASGN:

- EMPLID
- AID_YEAR
- INST
- STRM

1. Enter the institution and aid year for which you want to assign budget items and amounts.

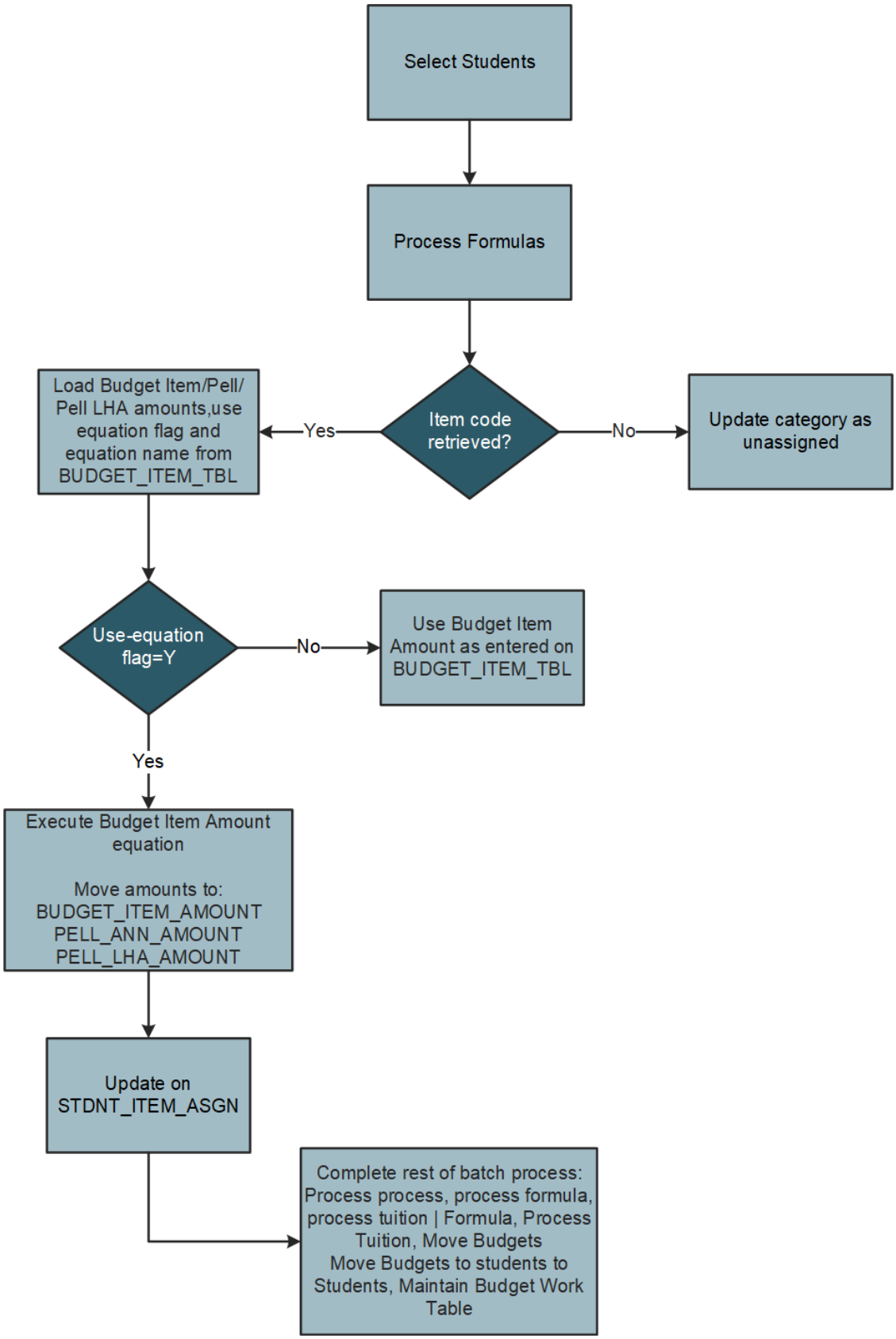
   When you tab out of the **Aid Year** field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.
2. Run the Stdnt Bdgt Assign - Equations (student budget assignment - equations) process (FAPBDGTE) when you are ready to assign budget items and amounts.
3. After the process runs, view the information on the Batch Student Budget Review page to ensure that the budget item amount is accurate based on the budget formula assigned.

Processing Formulas

Access the Batch Budget Assignment - Process Formulas page (**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Process Formula**, and then **Batch Budget Assignment - Process Formulas**).

Budget Assignment Using Formulas

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1. Enter the institution and aid year for which you want to assign budget items and amounts.

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When you tab out of the **Aid Year** field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.

2. Run the Stdnt Bdgt Assign - Formulas (student budget assignment - formulas) process (FAPBDGTF) when you are ready to assign budget items and amounts.
3. After the process runs, view the information on the Batch Student Budget Review page to ensure that the budget item amount is accurate based on the budget formula assigned.

Processing Trees and Tuition

Access the Batch Budget Assignment - Process Trees and Tuition Calcs page (**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Process Tuition**, and then **Batch Budget Assignment - Process Trees and Tuition Calcs**).

1. Enter the institution and aid year for which you want to assign budget items and amounts.

   When you tab out of the **Aid Year** field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.
2. Run the Stdnt Bdgt Assign - Tuit/Tree (student budget assignment - tuition/tree) process (FAPBDGTT) when you are ready to assign budget items and amounts.
3. After the process runs, view information on the Batch Student Budget Review page to ensure that the budget item amount is accurate for those budget items determined by either tuition calculation or budget trees.

Moving Student Budgets

Access the Batch Budget Assignment - Move Budgets page (**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Move Budget to Students**, and then **Batch Budget Assignment - Move Budgets**).

1. Enter the institution and aid year for which you want to move budgets.

   When you tab out of the **Aid Year** field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.
2. Run the Stdnt Bdgt Assign - Move (student budget assignment - move) process (FAPBDGTM) when you are ready to move student budgets.
3. After the process runs, view information on the Batch Student Budget Review page to ensure that the budget item amount moved successfully during the batch.

Maintaining Budget Tables

Access the Batch Budget Assignment - Table Maintenance page (**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Maintain Budget Work Table**, and then **Batch Budget Assignment - Table Maintenance**).

1. Enter the institution and aid year for which you want to maintain tables.

   When you tab out of the **Aid Year** field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page. The process run from this page uses the specified delete and reset options to clean up the budget work table.
2. Run the Stdnt Bdgt Assign - Delete (student budget assignment - delete) process (FAPBDGTD) when you are ready to clean up the work table. Although this process is usually run after you have moved student budgets, you can run it whenever you need to update the work table.

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Applying Pell Adjustments

Access the Pell Budget Adjustments page (**Financial Aid**, and then **Budgets**, and then **Assign Budgets**, and then **Adjust Pell Budgets in Batch**, and then **Pell Budget Adjustments**).

Use this page to calculate the annual Pell budget for budget categories that count towards the Pell cost of attendance (COA). The Pell Budget Adjustments process (FAPPBGTB) uses the student's FA Load value from the student's Financial Aid Term record and the proration scheme that you define on the Pell Adjustments page for each budget item to determine the annual Pell budget amount for each Pell COA budget item.

You should run this process at the end of the add/drop period, because the student's term schedule (and therefore FA Load value) is stable at this point.

You must run the Student Budget Assign process before you run the Pell Budget Adjustments process.

1. Enter the institution, aid year and career for which you want to calculate the annual Pell budget based on a student's FA Load value.

   Because Pell grants are available for undergraduate students only, you should select undergraduate careers only for this process.
2. Run the Pell Budget Adjustments process.

Assigning Budgets Online

Use online background budget assignment to generate budgets for individual students, using the same rules as batch background budget assignment.

This section discusses how to:

- Create budgets online.
- Review term budget information.

Pages Used to Assign Budgets Online

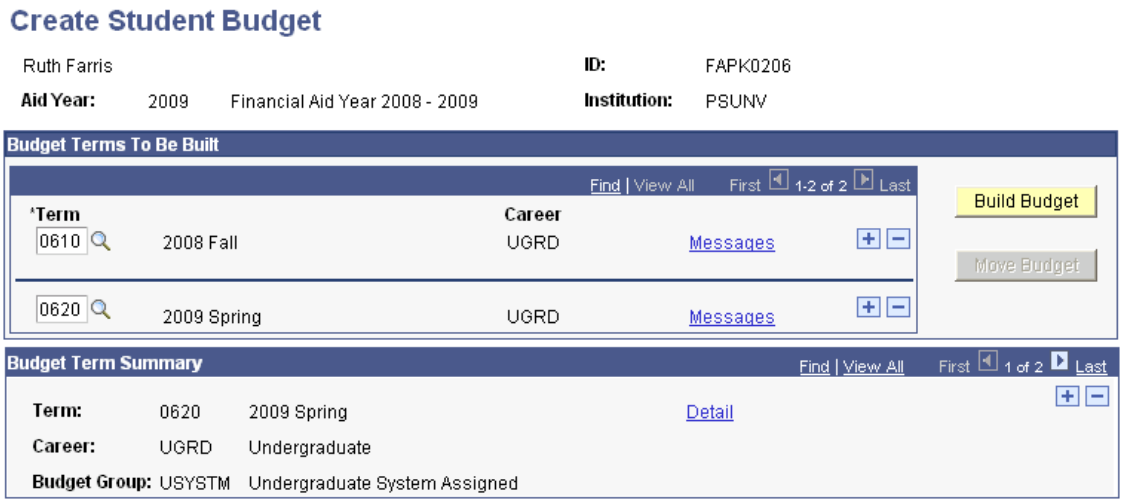
Page Name	Definition Name	Navigation	Usage
Create Student Budget	STDNT_BDGT_CALC	**Financial Aid**, and then **Budgets**, and then **Create Student Budget**, and then **Create Student Budget**	Generate a budget online for a single student.
Student Budget Messages	STDNT_BDGT_MSG_SEC	Click the **Messages** link on the Create Student Budget page.	View student budget messages.
Student Budget Message Detail	STDNT_BDGT_DTL_SEC	Click the **Detail** link on the Student Budget Messages page.	View detailed student budget messages.
Budget Term Summary Detail	STDNT_BDGT_CAL_SEC	Click the **Detail** link on the Create Student Budget page.	Review and make changes to a student's term budget details.

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Creating Budgets Online

Access the Create Student Budget page (**Financial Aid**, and then **Budgets**, and then **Create Student Budget**, and then **Create Student Budget**).

This example illustrates the fields and controls on the Create Student Budget page. You can find definitions for the fields and controls later on this page.



Budget Terms To Be Built

Field or Control	Description
Term	Select the terms for which to build a budget. You must build a budget for each term in which the student enrolls. You can only select terms created for that student for the displayed aid year.
Career	Displays the career associated with the selected term.
Messages	Click to access the Student Budget Message page, where you can view any messages generated during the budget assignment process.
Build Budget	After selecting the terms to build, click this button to launch the process that performs all the activities that the batch Student Budget Assignment processes performs. The process selects budget categories and uses Budget Equations, Budget Formulas, and the Trees and Tuition Calculation to determine budget items and amounts. The process also calculates the annual Pell budget based on the student's FA Load value.

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Field or Control	Description
Move Budget	After you verify that the budget information that appears is correct, click this button to move budget information from the budget work table to the student's budget record. This button is not available until you click the **Build Budget** button.

Budget Term Summary

Displays the term, career, and budget group used (if any) to build the student's budget for each term selected in the **Budget Terms To Be Built** group box. Use the scroll arrows to view additional terms. If you have not clicked the **Build Budget** button, this group box does not display any information.

Field or Control	Description
Detail	Click to access the Budget Term Summary Detail page and view or update term detail information for the student after you build the budget.

Related Topics

- Understanding Managing Financial Aid Terms
  This section lists prerequisites and discusses methods to build financial aid terms.
- Creating Budget Groups
  To set up budget groups, use the Budget Groups component (BUDGET_GROUP_TABLE). Use the BUDGET_GROUP_TABLE_CI component interface to load the data into the tables for these component interfaces.

Reviewing Term Budget Information

Access the Budget Term Summary Detail page (click the **Detail** link on the Create Student Budget page).

Use this page to review and make changes to a student's term budget details.

You can specify cents for budget item amounts on this page. For example, you might enter or update loan fees calculated by the guarantee agency. You cannot specify cents on the Create Budget Items setup page.

> **Note**
>
> You cannot change a budget amount if the budget item was already moved to the student's budget record.

Related Topics

- Viewing Batch Student Budget Review
  Access the Batch Student Budget Review page (**Financial Aid**, and then **Budgets**, and then **View Batch Budget Details**, and then **Batch Student Budget Review**).

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Maintaining a Term Budget

This section discusses how to maintain an existing term budget or create a term budget on an exception basis.

Pages Used to Maintain a Term Budget

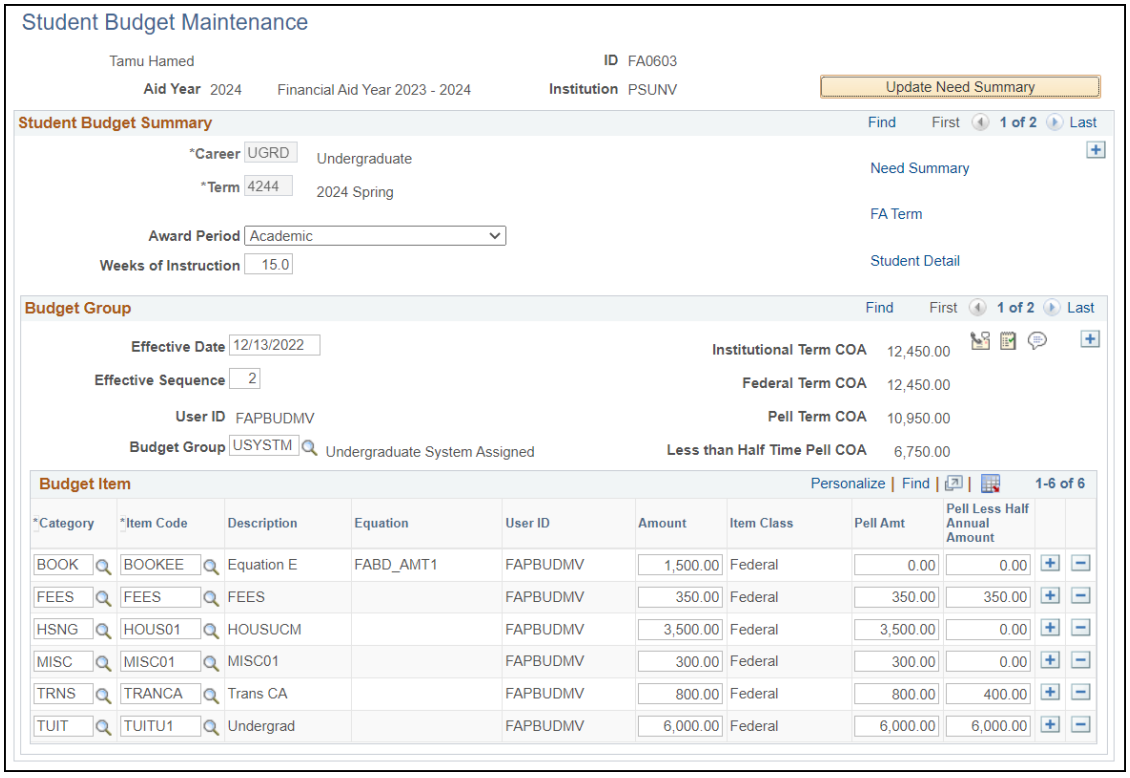
Page Name	Definition Name	Navigation	Usage
Student Budget Maintenance	STDNT_TERM_BUDGET	**Financial Aid**, and then **Budgets**, and then **Maintain Term Budgets**, and then **Student Budget Maintenance**	Maintain an existing term budget or create a term budget on an exception basis.
Financial Aid Term	STDNT_FA_TERM_SEC	Click the **FA Term** link on the Student Budget Maintenance page.	View the student's financial aid term information.
Student Budget Maintenance - Need Summary	NEED_SUMM_BGT_SEC	Click the **Need Summary** link on the Student Budget Maintenance page.	View a student's federal and institutional need for the aid year.
Student Detail	STDNT_BDGT_DTL1	Click the **Student Detail** link on the Student Budget Maintenance page.	View student information.

Maintaining an Existing Term Budget or Creating a Term Budget

Access the Student Budget Maintenance page (**Financial Aid**, and then **Budgets**, and then **Maintain Term Budgets**, and then **Student Budget Maintenance**).

This example illustrates the fields and controls on the Student Budget Maintenance page. You can find definitions for the fields and controls later on this page.

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To build terms on this page, you can either add budget categories manually or use a budget group. You can also use this page to view any budget by term, regardless of how it was calculated. The additions and changes made to this page go directly into the student's budget record, not a worktable.

You can specify cents for the budget item amounts on this page. For example, you might enter or update loan fees calculated by the guarantee agency. You cannot specify cents on the Create Budget Items setup page.

Field or Control	Description
Update Need Summary	Click this button to recalculate the Need Summary totals. The Need Summary Validation process updates the Unmet Need, Overaward Need, Unmet COA, and Overaward COA (FM and IM) totals to reflect this change in Budgets.
Career	Select the student's career during the term for which you are building or viewing a budget.
Term	Select the term to which the budget belongs. To view additional terms in the displayed aid year, use the scroll arrows.
Award Period	The system automatically populates this field with the default award period designation assigned to the term on the Valid Terms for Career page. You can change this value.
Weeks of Instruction	Displays the weeks of instruction for the selected term as defined on the Records/Term Info page in the Financial Aid Term component.

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Field or Control	Description
Need Summary	Click to access the Student Budget Maintenance - Need Summary page and view the student's federal and institutional need for the aid year.
FA Term (financial aid term)	Click to access the Financial Aid Term page and view information entered for the student in the Financial Aid Term component.
Student Detail	Click to access the Student Detail page and view student information.
Effective Date	To modify an existing budget, add a new effective-dated row for each term you want to change. This functionality enables you to change the student's entire budget group or individual budget item amounts.
Effective Sequence	Displays a system-generated number assigned to distinguish between effective-dated rows entered on the same date. You can have up to 10 effective-dated rows per day.
User ID	If the budget is calculated online, the system displays the user ID of the individual creating the budget; if it is calculated through the batch budget assignment process, the system displays the background process name.
Budget Group	(Optional) Enter a budget group to build a budget for the student. When you select a budget group and tab out of this field, the system displays the associated categories, item codes, amount, item class, and Pell amount.
Institutional Term COA (institutional term cost of attendance), **Federal Term COA** (federal term cost of attendance), and **Pell Term COA** (Pell term cost of attendance)	Costs of attendance displayed after you build a budget.
Less Than Half Time Pell COA (less than half-time Pell cost of attendance)	Displays the Pell amount for less than half-time.
Equation	Displays amount equation used to determine amount, if applicable.
User ID	If the budget item is assigned manually, the system displays the user ID of the individual assigning the budget item; if the budget item is assigned through the online or batch budget assignment process, the system displays the process name. This field cannot be changed.
Amount	Displays the per term budgeted amount associated with the budget item code. You can change this amount.
Pell Amt (Pell amount)	Displays the term budgeted amount for the Pell budget associated with the budget item code. You can change this amount.
Pell Less Half Annual Amount (Pell less than half-time Pell annual amount)	Displays the term budgeted amount for the Pell less than half-time budget associated with the budget item code. You can change this amount.

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Related Topics

- Reviewing Student Packaging Status by Date
  The student's financial aid award package as well as the information used to award a student can change over time. The As Of Status component enables you to view information about a student's ISIR information and award package by a particular date in time. As new ISIR data is loaded, a student's award package may change. Use the pages in the As Of Status component to review changes over time. This can be particularly important for explaining a reduced award to a student or for reviewing changes to student's awards.
- Viewing Need Summary Information
  Access the Need Summary page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Need Summary**).

Reviewing Students' Budget Information

This section discusses how to review student budget information.

Page Used to View Student's Budget Information

Page Name	Definition Name	Navigation	Usage
Student Budget Summary	STDNT_BUDGET_SUMM	**Financial Aid**, and then **Budgets**, and then **View Student Budget Summary**, and then **Student Budget Summary**	Review students' budget information, including categories and amounts that comprise a student's budget, by award period.

Viewing Students' Budget Information

Access the Student Budget Summary page (**Financial Aid**, and then **Budgets**, and then **View Student Budget Summary**, and then **Student Budget Summary**).

This page displays information by award period.

Field or Control	Description
Alt Pell COA (alternate Pell cost of attendance)	Displays the sum of child care, disability, and tuition Pell amounts from the budget items assigned to the student. The Packaging routine uses this COA when awarding Pell Grants using the Alternate Pell Grant Schedule.
Pell LTHT (Pell less than half-time)	Displays the Pell less than half-time amount. The Packaging routine uses this COA when awarding Pell Grants for students who are enrolled less than half-time.
Inst Total (institutional total)	Displays the amount for this budget category used when the system calculates the institutional COA. Categories that have nonzero amounts in this field are institutional budget categories.

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Field or Control	Description
LHT Pell Total (less than half-time Pell total)	Displays the amount for this budget category used when the system calculates the Pell LTHT budget.
Pell Total	Displays the amount for this budget category used when the system calculates the Pell budget. The Alternate Pell budget consists of child care, disability, and tuition Pell amounts only.
Fed Total (federal total)	Displays the amount for this budget category used when the system calculates the federal COA. Categories that have nonzero amounts in this field can be either institutional or federal budget categories.

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21

Defining Application Processing Options

Prerequisites for Defining Application Processing Options

Before you define application processing options, take steps to review predefined need analysis tables, all financial applications you use, and your understanding of admit levels and external loads.

The Financial Aid system provides predefined tables in compliance with federal regulations. This enables you to use the Institutional Need Analysis System (INAS) process and CSS PROFILE for Institutional Methodology (IM) Expected Family Contribution (EFC) calculations and to use the Federal Methodology Need Analysis Calculator (FM NAC) for FM EFC/SAI (Student Aid Index) calculations. Before you define application processing options, review these tables for warnings about the consequences of making changes.

Also, ensure that the financial aid applications used by your institution are available, and make sure that you understand the different admit levels that influence how external data loads are processed. To help you most effectively use the Financial Aid application processing, refer to these websites:

- U.S. Department of Education, Federal Student Aid: https://fsapartners.ed.gov/home/.
- National Association of Financial Aid Administrators (NASFAA): https://www.nasfaa.org/.
- The College Board: https://www.collegeboard.org/.

Working with Applications

To set up applications, use the Application Source Rank component (FA_APP_SOURCE_RANK), the Assign Status to Admit Levels component (ADMIT_LVL_TBL), and the Define Careers for Prospects component (PROSPECT_SOURCE).

This section provides an overview of application processing options and discusses how to:

- Define application source rank.
- Review admit level associations.
- Set up Academic Career assignments from the Financial Aid application

Understanding Application Processing Options

Managing financial aid application data requires coordinating many data files—both incoming and outgoing—with the Department of Education's Central Processing System (CPS)/FAFSA Processing System (FPS) through the Student Aid Internet Gateway (SAIG). Campus Solutions also supports the CSS PROFILE application and provides you with the tools to construct your own institutional application.

This section discusses how to control the import and export of financial aid data through the Campus Solutions system. It discusses setting up global options and defines how your institution handles both federal and institutional need analysis methodologies.

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Controlling the flow of incoming need analysis data is essential because more students apply to an institution than are admitted. Admit levels are associated with an academic program status in PeopleSoft Student Records. These levels enable you to filter requests for ISIRs or PROFILE applications based on a student's admission level, such as accepted or continuing, admitted, applied, or inactive.

You define your ISIR and PROFILE data load parameters on the Load parameter page. For example, you can elect to have a student's biographical and demographic data updated in PeopleSoft Campus Community and request records of students that you want to process. You can process only those students with a status level of accepted or continuing. At the same time, you can elect to suspend student records not already loaded into the system, suspend incoming records if the institutional review status and federal verification is completed, or load records of ISIRs that were rejected.

For students with multiple addresses, to ensure that you send financial aid information to the correct address throughout the year, select the order in which the system checks for an address to use. For example, you can have the system locate a mailing address and if it is not available, the system searches for a second address. The Campus Solutions system shares address options, so you must coordinate address option changes with other departments that use the system.

You can define the parameters for global, federal, and institutional methodologies by using the College Board's INAS for IM and the FM NAC for FM. FM is a need analysis formula used to determine the Expected Family Contribution (EFC)/Student Aid Index (SAI) toward a student's education. Financial Aid calculates need analysis based on the options that you select.

Pages Used to Work with Applications

Page Name	Definition Name	Navigation	Usage
Application Source Ranking	FA_APP_SOURCE_RANK	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Application Source Rank**, and then **Application Source Ranking**	Define which application the Budget Assignment background process should use for Budget Formula and Budget Tree criteria.
Admit Level Associations	ADMIT_LVL_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Assign Status to Admit Levels**, and then **Admit Level Associations**	Review the admit designations set up by your institution.

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Page Name	Definition Name	Navigation	Usage
Prospect Source X-Ref Setup (prospect source cross-reference setup)	PROSPECT_XREF_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Define Careers for Prospects**, and then **Prospect Source X-Ref Setup**	Set up prospect cross-references by associating careers from external sources with an academic career at your institution. The ISIR load process uses this information to assign a default academic career for financial aid applicants who are not yet admitted.

Defining Application Source Rank

Access the Application Source Ranking page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Application Source Rank**, and then **Application Source Ranking**).

This example illustrates the fields and controls on the Application Source Ranking page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution, aid year, and source rank type.

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Application Source Ranking Information

Field or Control	Description
Status	Select *Active* or *Inactive.*
Award Period	Select *Academic* or *Non Std* (nonstandard), to associate the award period with the application source rank.
Description	Enter the description of the application source rank.
Comments	Enter any additional information regarding the application source rank.
Source of Information	Select the source of information. Values are: *FAFSA* (Free Application for Federal Student Aid). *Inst App* (institutional application).
Application Source	If the source of information is *Inst App* (institutional application), select from these values: *FT CSL* (Full-time Canada Student Loan), *Inst App* (institutional application), *PROFILE,* and *PT CSL* (Part-time Canada Student Loan).
Source Ranking	Rank your preference for source data. The system selects the lowest number first, and if that application does not exist for the student, the system searches for the next ranked item.

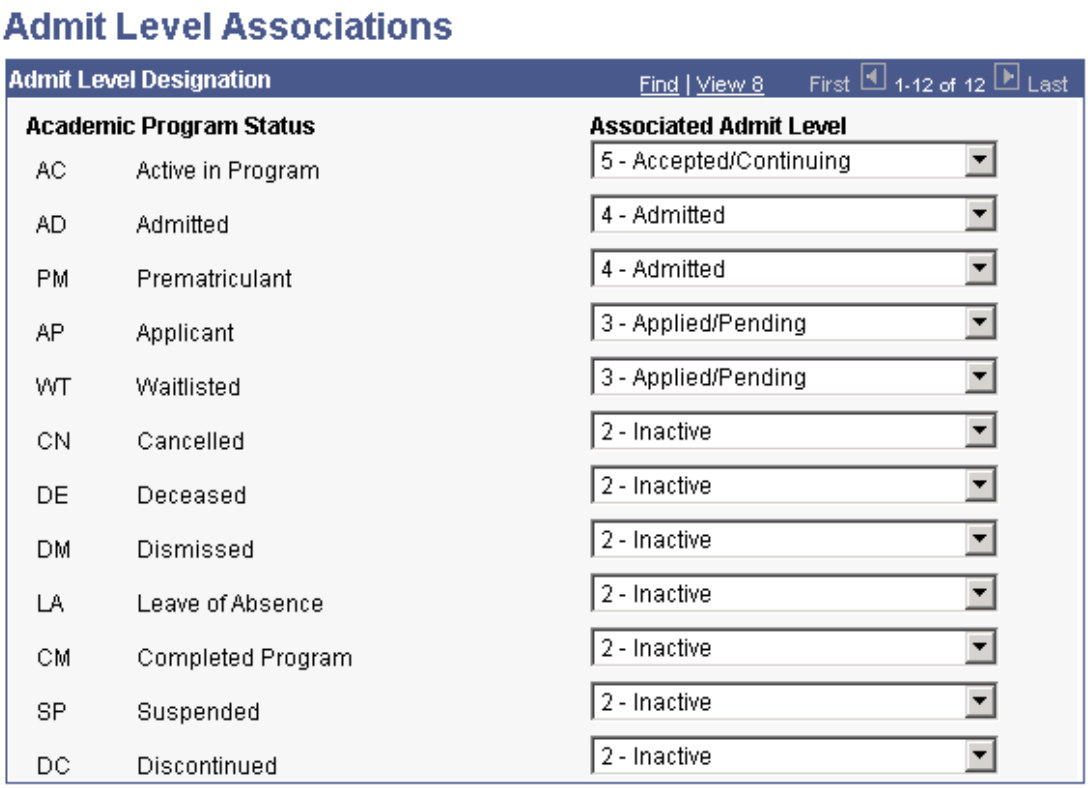
> **Note**
>
> For the Canadian Need Analysis system, run full-time CSL applications first, followed by part-time CSL applications.

Reviewing Admit Level Associations

Access the Admit Level Associations page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Assign Status to Admit Levels**, and then **Admit Level Associations**).

This example illustrates the fields and controls on the Admit Level Associations page. You can find definitions for the fields and controls later on this page.

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External data loads, such as the FAFSA and the CSS PROFILE application can consider a student's admission status and academic progress. According to your business rules, you decide how to handle different academic program statuses during the external data load and which level of student to add to the database.

The Admit Level Associations page displays the association between each academic program status and an admit level.

> **Note**
>
> The system delivers admit level values as translate values. Any modification to these values requires substantial programming and modification effort. However, the descriptions can be changed to fit your institution's terminology, as used by your institution.

The system displays all available academic program status options.

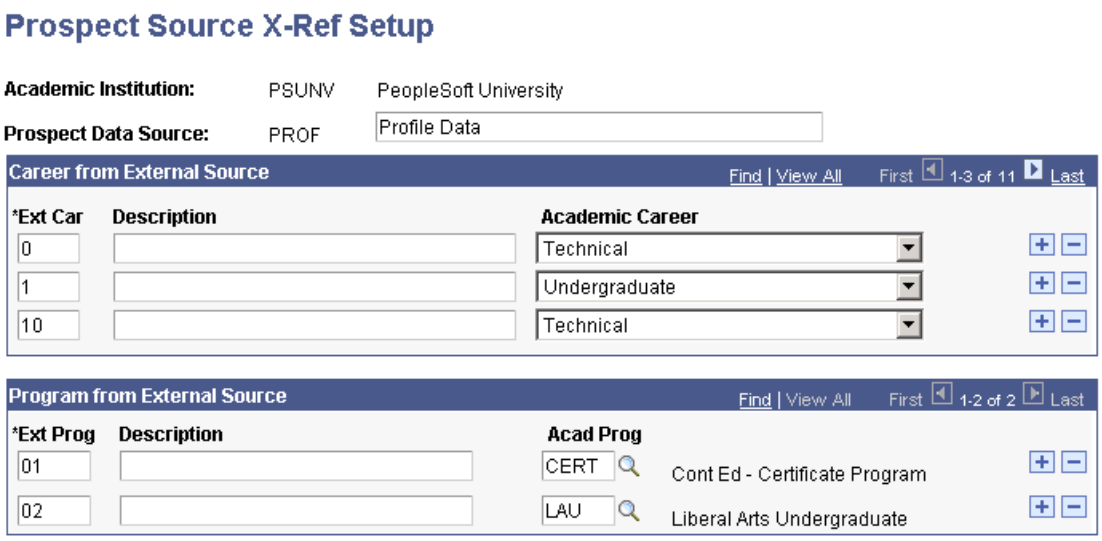
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Field or Control	Description
Associated Admit Level	Associate an admit level with each academic program status. The associated admit level that you select affects the selections that you make when setting up your ISIR data load parameters. The associated admit levels are associated with the student academic program status in PeopleSoft Student Records. Values are: *5 - Accepted/Continuing* *4 - Admitted* *3 - Applied/Pending* *2 - Inactive* *1 - Has Not Applied*

Setting Up Academic Career Assignments from the Financial Aid Application

Access the Prospect Source X-Ref Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Define Careers for Prospects**, and then **Prospect Source X-Ref Setup**).

This example illustrates the fields and controls on the Prospect Source X-Ref Setup page. You can find definitions for the fields and controls later on this page.



The system displays the academic institution and the prospect data source for ISIR processing. ISIRnn indicates the aid year. For example, ISIR08 is for the 2007–2008 ISIRs. Refer to the annual regulatory release documentation for information on the Prospect Data Source for future financial aid years.

Career from External Source

Click the **Add** button to insert additional rows for external careers to associate with an academic career.

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Field or Control	Description
Ext Car (external career)	Select the corresponding external career sections for the CSS PROFILE application. The external career relates to the expected degree or certificate question on the FAFSA.
Description	Enter a description from the ISIR for the external career.
Academic Career	Select the academic career that you want to associate with the various external career codes that come in on students' ISIR records. You can also assign a default academic career to ISIR records that are loaded where the expected degree question on the FAFSA is blank. Insert a new row under the **Career from External Source** group box and enter *DFLT* (default) in the **Ext Car** column. Enter the default academic career that you want to assign to the ISIR record.

Program from External Source

This section is no longer used by any process.

Setting Up Financial Aid Processing

To set up financial aid processing, use the ISIR Data Load Parameters component (ISIR_INST_CONTROL), the Maintain ISIR Comment Codes component (ISIR_MESSAGES), the Maintain EDI Transactions component (FA_ECTRANS), and the Define Commit Levels component (PROCESS_COMMIT_TBL).

This section provides an overview of financial aid processing setup and discusses how to:

- Define ISIR data load options 1.
- Define ISIR data load options 2.
- Define ISIR data load options 3.
- Define ISIR institutional search match.
- Set severity levels for ISIR reject reasons.
- Set severity levels for ISIR comment codes.
- Set up Financial Aid EDI transactions.
- Set up commit levels for COBOL processes.

Understanding Financial Aid Processing Setup

This section describes the setup for inbound and outbound ISIR file processing.

Inbound processes are used to load Institutional Student Information Records (ISIRs) from the U.S. Department of Education (ED) Central Processing System (CPS)/FAFSA Processing System (FPS) and to evaluate and load error files. Not every inbound process requires a separate setup. In this section, you set up the data load parameters for loading ISIRs from the Electronic Data Interchange (EDI) staging tables into the system database.

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You can control the file information that appears on the ISIR Electronic Commerce (EC) Queue Review and Loan EC Queue Review pages. This information is populated by the system and does not require any additional setup unless you want to change the file information that appears on the EC Queue pages.

Processing ISIRs Out of Sequence

The load process ensures that the system processes ISIR files in the order that they are loaded into the ISIR staging tables. This is achieved by using the EC Queue instance number assigned to each ISIR file as the FA EC File Inbound processes it. As long as a school loads its ISIR files based on the creation date by the CPS/FPS, the load process addresses them in order. If schools use the Process ISIR run control page to restrict the types of files to be processed, the system processes those files in load order.

If the system cannot load ISIR files into the staging tables in the proper sequence, ISIR records with a lower ISIR transaction number than the current loaded ISIR can load. However, the Federal Methodology (FM) EFC/SAI and federal database match information from the older ISIR does not update the current information. You can view that information on the Packaging Status Summary panel group.

Using the EFC Override Option

> **Note**
>
> EFC Override is only supported for Aid Years 2023-2024 and earlier.

You can override the Expected Family Contribution (EFC) for a student. Because schools may not want to enforce an EFC override at the point a new ISIR is loaded, the ISIR Data Load Parms option of *EFC Override Encountered* controls how these records would be processed. The system enforces this option only when the **Call INAS** option is not used. Based on the setting of this option, the following occurs during the ISIR Load process:

Term	Definition
Ignore EFC Override Values	The system processes the ISIR as if a prior EFC override never existed. The EFC values that are calculated during the ISIR load function normally. An EFC Status Message of *EFC Override Ignored* posts on the ISIR Inbound Summary nn/nn component.
Suspend Incoming Record	The system automatically suspends the ISIR record for manual review by the staff. A new suspend reason of *EFC Override Found* posts.
Use EFC Values	The system loads the ISIR, but uses established EFC override values instead of recalculating them from the ISIR information. The system posts an EFC Status Message of *EFC Override Used* on the ISIR Inbound Summary nn/nn component.

Updating NSLDS History from the ISIR

When an ISIR is loaded, the NSLDS data on the ISIR updates the NSLDS tables if the Transaction Process Date on the ISIR is greater than the current effective dated row on the NSLDS tables. If the Transaction Process Date on the ISIR is equal to the current effective

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dated row on the NSLDS tables, the process compares the NSLDS Transaction Numbers. NSLDS data on ISIRs that are suspended can be allowed to load by using the Load NSLDS Data option on the ISIR Load Options 1 page.

See Defining ISIR Data Load Options 1.

NSLDS sends system generated ISIRs to schools whenever a change occurs to the student's eligibility status within the National Student Loan Database System. It's important to load this information in a timely manner in order to have the most recent eligibility information on file. NSLDS data that is loaded can also be 'pushed' to the aggregate tables to allow the packaging routine access to the NSLDS data when evaluating aid eligibility. Use the NSLDS Data Push routine to push data into the aggregate tables.

See Understanding the NSLDS Data Push Process.

Determining the ISIR Type During the ISIR Load

The ISIR load process determines the type of ISIR record—applications, corrections, or system generated—by reviewing each individual ISIR. The system accomplishes this by reviewing the **Transaction Data Source/Type** field on the ISIR.

> **Note**
>
> For a complete description of the **Transaction Data Source/Type** field values, review the U.S. Department of Education's *Technical Manual for Electronic Data Exchange (EDE).*

For the 2023-2024 and prior Aid Years, this table indicates the **Transaction Data Source/Type** values that are selected for processing based on the ISIR Type selected on the ISIR Load Run Control page.

ISIR Load Run Option	Transaction Data Source/Type
Applications	1A, 2A, 2B, 2E, 2F, 2G, 2H, 2R, 2T, 3A, 3E, 3G, 3R, 4A, 4B, 4J, 4K, 4R, 4U, 4V, 5S, 6A, 6B, 6E, 6F, 7G, 7H, 7R, 7T
System Generated	5D, 5L, 5M, 5N, 5P, 5W, 5X, 5Y
Corrections	1C, 2C, 3C, 4C, 6C

For the 2024-2025 and future Aid Years, ISIR transactions have a Transaction Type of "A" for "Application" or "C" for "Correction". System Generated ISIRs have a Transaction Type of "C" and Transaction Source of "5" for "FAFSA Processing System (FPS)".

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Pages Used to Set Up Financial Aid Processing

Page Name	Definition Name	Navigation	Usage
ISIR Load Options 1	ISIR_INST_CONTROL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Load Options 1**	Define how ISIR data from the CPS/FPS is loaded into the system.
ISIR Load Options 2	ISIR_INST_CONTROL2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Load Options 2**	Define how ISIR data from the CPS/FPS is loaded into the system.
ISIR Load Options 3	ISIR_INST_CONTROL3	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Load Options 3**	Define how corrected ISIR data from the CPS/FPS is loaded into the system.
ISIR Inst SearchMatch	ISIR_INST_SRCHMCH	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Inst Search Match**, and then **ISIR Inst SearchMatch**	Define how ISIR records are processed when identified by the Search Match process. You can avoid duplicate records and determine whether the ISIR records are loaded into the database as new records, are appended to existing records in the database, or are ignored.
ISIR Reject Reasons	ISIR_REJECT_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Maintain ISIR Comment Codes**, and then **ISIR Reject Reasons**	Review delivered ISIR reject reasons and set severity levels.

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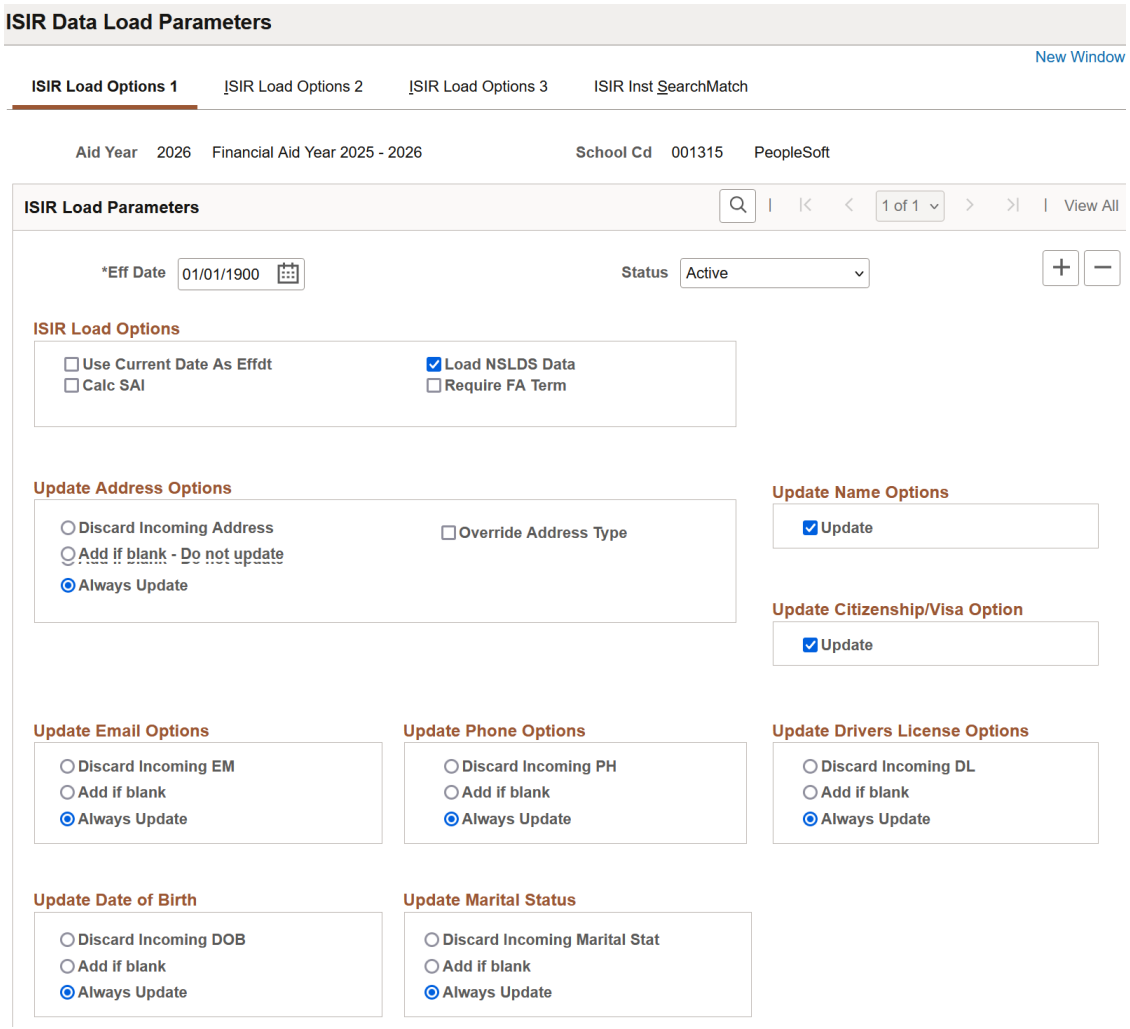
Page Name	Definition Name	Navigation	Usage
ISIR Comments	ISIR_COMMT_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Maintain ISIR Comment Codes**, and then **ISIR Comments**	Review delivered ISIR comment codes and set severity levels. Database Match Use setting can be adjusted to control treatment by the Packaging process. This page links the comment codes with the long description or text defined by ED.
Financial Aid EDI Transactions	FA_ECTRANS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Maintain EDI Transactions**, and then **Financial Aid EDI Transactions**	Set up financial aid Electronic Data Interchange (EDI) transactions. Control the EDI transactions that can be viewed in the ISIR File Review and Loan EC Queue Review pages.
Setup Commit Levels	PROCESS_COMMIT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Commit Levels**, and then **Setup Commit Levels**	Set up commit levels for COBOL processes. Control the commit levels for the ISIR Suspense Load (FAPSAR00) and ISIR Correction Build (FAPCOR00) COBOL processes.

Defining ISIR Data Load Options 1

Access the ISIR Load Options 1 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Load Options 1**).

This example illustrates the fields and controls on the ISIR Load Options 1 page. You can find definitions for the fields and controls later on this page.

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These load parameters are for processing all initial ISIR records and system-generated ISIRs.

The system displays the aid year, school code, effective date, and status.

ISIR Load Options

Field or Control	Description
Use Current Date as Effdt (use current date as effective date)	Select to use the current date as the effective date of the ISIR information loaded into the ISIR Data Corrections component. If you do not select the check box, the system uses an effective date based on the CPS/FPS transaction processed date.
Call INAS/SAI (call Institutional Need Analysis System/Student Aid Index calculator)	Select to enable any ISIR that is loaded to immediately run the FM NAC program using the current Federal options. If you do not select this check box, the ISIR is queued for Mass EFC processing.

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Field or Control	Description
Load NSLDS Data (load National Student Loan Data System data)	Select this check box to direct the system to load new NSLDS data into the NSLDS tables when an ISIR is suspended or discarded—that is, skipped—and not loaded into the system. NSLDS data is loaded for suspended ISIRs under these conditions: • Search Match must not be called by the ISIR load process; this occurs automatically if an ISIR has been previously loaded for the student (for any aid year). • A current year ISIR must be previously loaded for the student. • The Transaction Process Date on the ISIR must be greater than the current effective dated row on the NSLDS tables. If these dates are the same, the process compares the NSLDS Transaction Numbers. • The NSLDS match flag cannot be *7* (match but no data provided) or *8* (record not sent to NSLDS).
Require FA Term	Select to require that at least one active FA Term record for the corresponding Aid Year exists in order for the record to be considered for addition to the ISIR Application tables.

> **Note**
>
> The option to use the CPS/FPS transaction processed date as the effective date for the loaded data is available only for initial ISIR records loaded for the aid year. When all corrected ISIRs are loaded, the system uses the current date as the effective date.

Update Address Options

Field or Control	Description
Discard Incoming Address	Select to prevent a student's address information from being updated in personal data when an ISIR is loaded.
Add if blank - Do not update	Select if, when the ISIR is loaded, the student has no active address in personal data that matches the address usage criteria.
Always Update	Select to always update the appropriate address when the ISIR is loaded.
Override Address Type	Select to force the ISIR address to be loaded into a specific address type rather than use the ISIR address usage parameters set in the Process Demo Setup page.

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Update Name Options

Field or Control	Description
Update	Select if, when the ISIR is loaded, the student has no active name in personal data that matches name usage criteria, to update the data with the ISIR name.

Update Citizenship/Visa

Field or Control	Description
Update	Select to update these bio/demo fields when the ISIR is loaded: • Citizenship Status • Visa Number

Update Email Options

Field or Control	Description
Discard	Select to prevent a student's email information from being updated in personal data when the system loads an ISIR.
Add if blank	Select if the student does not have an active email address in personal data that matches the defined usage criteria when the system loads an ISIR. The system creates an email address using the highest ranked email type defined in the usage criteria. If an existing matching address type exists, an update does not occur.
Always Update	Select to always update the appropriate email address when the system loads an ISIR. The system updates the highest ranked address and phone type defined in the usage criteria.

Update Phone Options

Field or Control	Description
Discard	Select to prevent a student's phone information from being updated in personal data when the system loads an ISIR.
Add if blank	Select if the student does not have an active phone number in personal data that matches the defined usage criteria when the system loads an ISIR. The system creates a phone number using the highest ranked phone type defined in the usage criteria. If an existing matching phone type exists, an update does not occur.
Always Update	Select to always update the appropriate phone number when the system loads an ISIR. The system updates the highest ranked phone type defined in the usage criteria.

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Update Drivers License Options

Field or Control	Description
Discard	Select to prevent a student's driver's license information from being updated in personal data when the ISIR is loaded.
Add if blank	Select to enable the following to occur: • If driver's license information exists for the student in the Campus Community records, the system does not load the ISIR information. • If no driver's license information exists in the Campus Community records, the system loads the ISIR information.
Always Update	Select to always update the driver's license fields when the ISIR is loaded. The system checks for an exact match of the driver's license number and driver's license state. If the system cannot locate an exact match, it deletes any entries for the student in the driver's license table where either the state or the license number match, and then inserts a new row with the driver's license number and state from the ISIR.

Update Date of Birth

Field or Control	Description
Discard	Select to prevent a student's date of birth information from being updated in personal data when the system loads an ISIR.
Add if blank	Select if the student doesn't have date of birth in personal data when the system loads an ISIR. The system adds the date of birth as provided on the ISIR record. If a date of birth exists in the CS personal data record, an update doesn't occur.
Always Update	Select to always update the student’s date of birth when the system loads an ISIR.

Update Marital Status

Field or Control	Description
Discard	Select to prevent a student's marital status information from being updated in personal data when the system loads an ISIR.
Add if blank	Select if the student does not have any marital status indicated in personal data when the system loads an ISIR. The system adds the marital status as provided on the ISIR record. If any marital status for the student is present in the CS personal data record, an update does not occur.

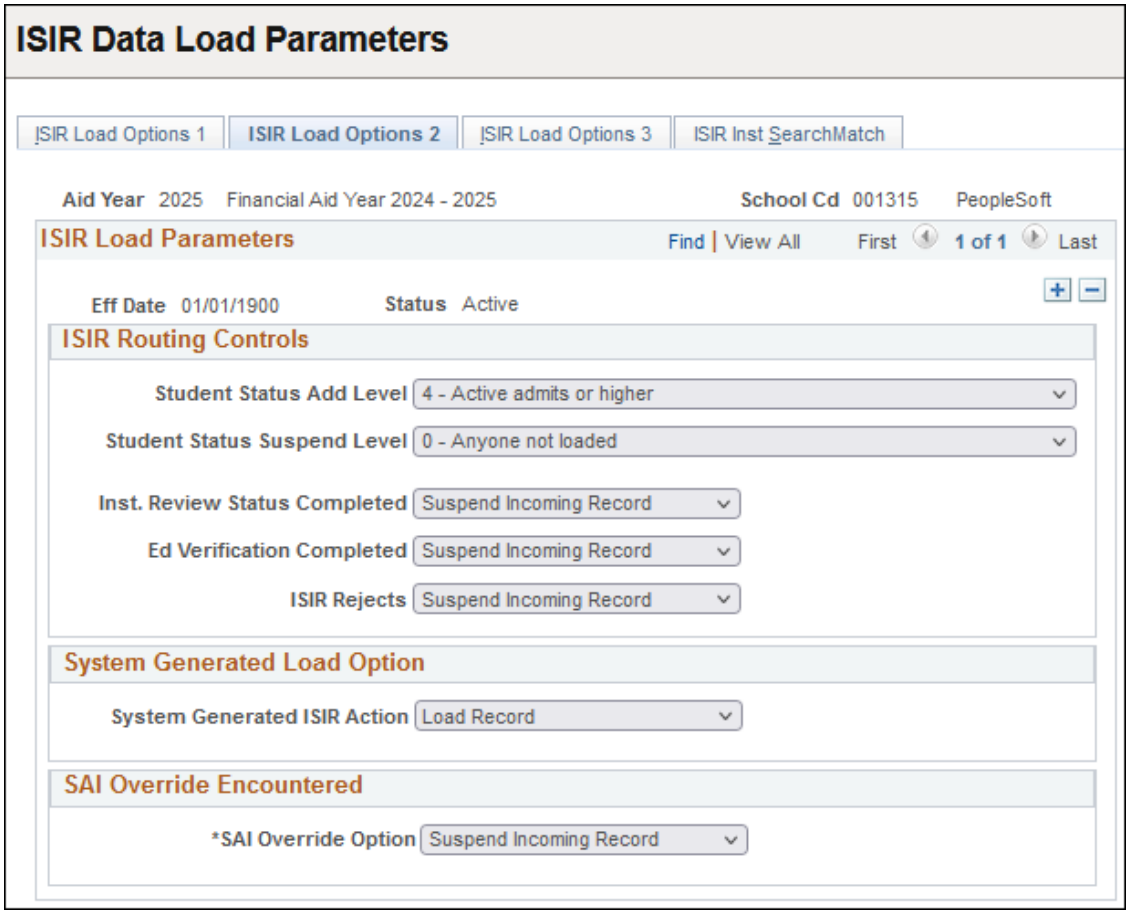
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Field or Control	Description
Always Update	Select to always update the student's marital status when the system loads an ISIR.

Defining ISIR Data Load Options 2

Access the ISIR Load Options 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Load Options 2**).

This example illustrates the fields and controls on the ISIR Load Options 2 page. You can find definitions for the fields and controls later on this page.



The system displays the aid year, school code, effective date, and status.

These load parameters are for processing all initial ISIR records and system-generated ISIR's.

During the ISIR Load process, the program processes these Data Load Parameters in the following order:

1. Inst. Review Status Completed
2. Ed Verification Completed

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3. ISIR Rejects
4. Add Admit Level/ Suspend Admit Level
5. EFC Override Encountered

The incoming ISIR record must meet the criteria defined at each processing step in order to be eligible to load.

ISIR Routing Controls

Field or Control	Description
Student Status Add Level	Select the minimum admit level that a student must have for the system to load the ISIR to the application tables. Values are: *0 - Load Everyone* *1 - Recruits or higher* *2 - Inactive Admits or higher* *3 - Applicants or higher* *4 - Active Admits or higher* *5 - Accepted/Continuing only*
Student Status Suspend Level	Select the minimum admit level that a student must have for the system to suspend the ISIR. Values include: *0 - Anyone not loaded* *1- Recruit or higher* *2 - Inactive Admits or higher* *3 - Applicants or higher* *4 - Active Admits or higher* *5 - Accepted/Continuing only*
Inst. Review Status Completed (institutional review status completed)	Select instructions for handling the ISIR if the institutional review status is complete. This status is maintained on the Packaging Status Summary page. Values are: *Discard Incoming Record, Load Record,* and *Suspend Incoming Record.*
Ed Verification Completed (educational verification completed)	Select the instructions for handling the ISIR if the educational verification is complete. This status is maintained on the Packaging Status Summary page. Values are: *Discard Incoming Record, Load Record,* and *Suspend Incoming Record.*
ISIR Rejects	Select the instructions for handling rejected ISIRs. Values are: *Discard Incoming Record, Load Record,* and *Suspend Incoming Record.*

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System Generated Load Option

Field or Control	Description
System Generated ISIR Action	Select the way in which system-generated ISIRs should be processed. All system-generated ISIRs follow the same ISIR load options and routing control rules as regular, noncorrection ISIRs. Select from these values: • *Discard Incoming Record:* Does not load the record; sets ISIR load status to Skip. • *Force Load Record* Choosing this option bypasses the following Data Load Parameters when trying to load the ISIR record: – Inst. Review Status Completed – Ed Verification Completed – ISIR Rejects All other Data Load Parameters are still checked. • *Load Record:* Processes the record and loads it if the load parameters are met. • *Suspend Incoming Record:* Suspends ISIRs that are pending review and sets the ISIR load status to *Suspended.*

> **Note**
>
> Because these ISIRs can be generated for various reasons, you might suspend all records of this type and first review them in the Suspense Management page before loading them. The load process attempts to determine and assign the ID before the record is suspended.

EFC Override Option

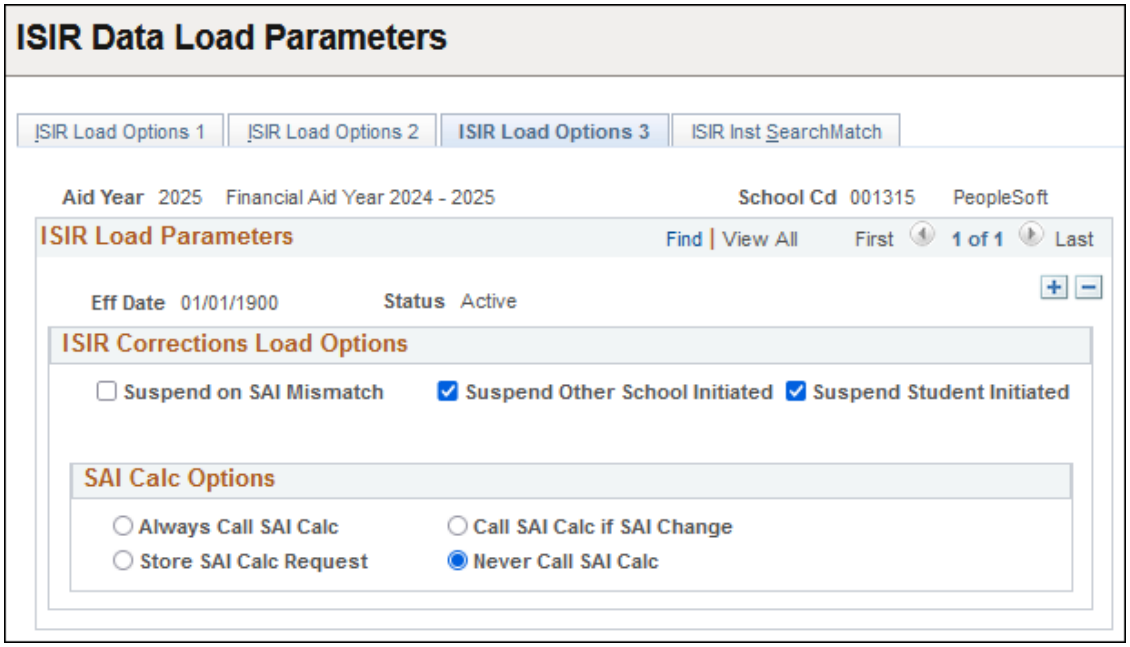
Field or Control	Description
EFC Override Encountered (expected family contribution override)	Select one of the following: *Ignore EFC Override Values, Suspend Incoming Record,* or *Use EFC Override Values.*

Defining ISIR Data Load Options 3

Access the ISIR Load Options 3 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Load Options 3**).

This example illustrates the fields and controls on the ISIR Load Options 3 page. You can find definitions for the fields and controls later on this page.

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Use these load parameters for processing all corrected ISIRs. To identify ISIRs corrected by the recipient school, the ISIR Electronic Transaction Indicator (ETI) field value is checked and only those records with a value of 0, 2, 4, or 6 are selected. This indicates that the recipient school initiated the correction record, and you can process the ISIR normally. You can suspend any other ISIR ETI value, except blank, as a non-school initiated correction using the Suspend Other School Initiated and Suspend Student Initiated ISIR load options.

> **Note**
>
> The process of loading corrected ISIRs is not the same as for initial ISIRs. See Processing Inbound Files for details.

The system displays the aid year, school code, effective date, and status.

ISIR Corrections Load Options

Field or Control	Description
Suspend on EFC/SAI Mismatch (suspend on expected family contribution/student aid index mismatch)	Select to suspend the corrected ISIR if the primary EFC/SAI on the ISIR does not match the last calculated primary EFC/SAI for the student stored in PS_ISIR_COMPUTED.PRIMARY_EFC.
Suspend Other School Initiated	Select to suspend ISIRs that are initiated by another school or the CPS/FPS.
Suspend Student Initiated	Select to suspend ISIRs that are initiated by the student.

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> **Note**
>
> A school-initiated correction is processed with the Suspend on EFC/SAI Mismatch load option set. If no previously loaded ISIR exists, the process treats the condition as an application ISIR and follows the application ISIR load parameter settings. This allows initially rejected ISIRs corrected by the school to load as initial application ISIRs.

Because a student has likely already been processed for financial aid when you receive the corrected ISIR, the system provides INAS options.

INAS/SAI Call Options

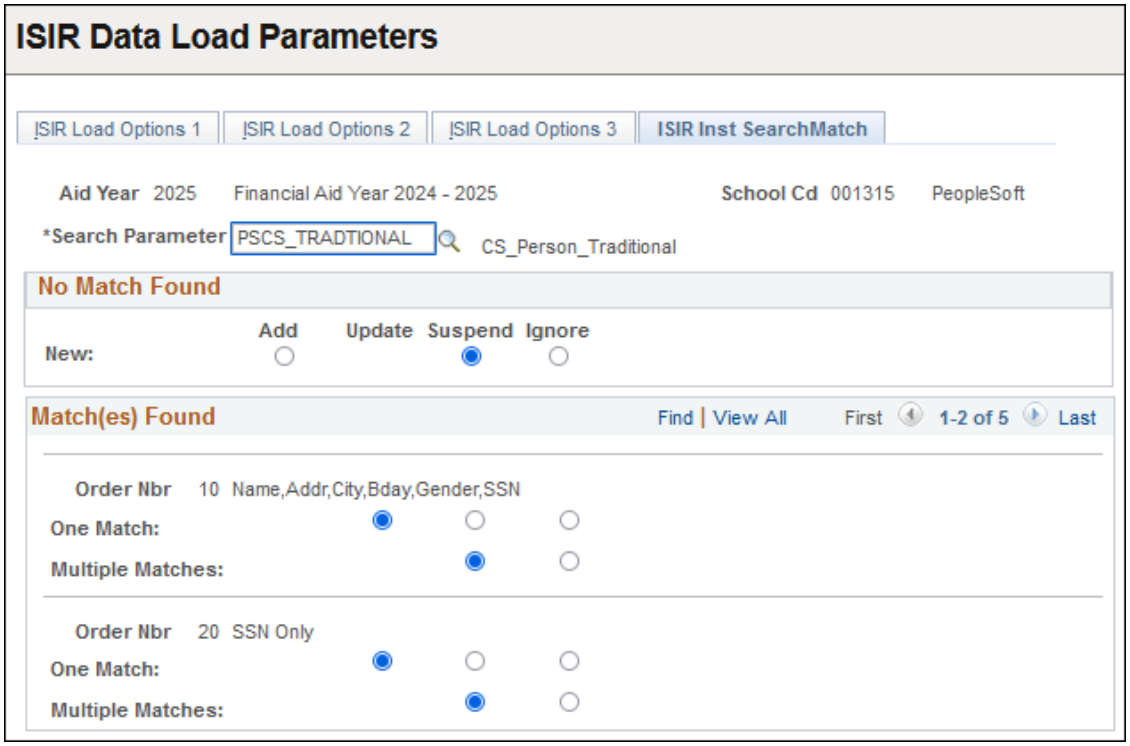
Field or Control	Description
Always Call EFC/SAI Calc (always call Institutional Need Analysis System)	Select to run the FM NAC calculation as the ISIR is loaded into the application tables. This is similar to the **Call INAS** check box on the ISIR Load Options 1 page.
Store EFC Calc/SAI Calc Request (store Institutional Need Analysis System calculation request)	Select to store the ID and aid year of the record for later Mass EFC/SAI processing.
Call EFC/SAI Calc if EFC/SAI Change (call Institutional Need Analysis System if expected family contribution change)	Select to run an FM NAC calculation only if the primary EFC/SAI on the ISIR does not match the last calculated primary EFC/SAI.
Never Call EFC/SAI Calc (never call Institutional Need Analysis System)	Select to disable the system from calling the FM NAC when the ISIR is loaded. This feature doesn't support future Mass EFC/SAI calculation.

Defining ISIR Institutional Search Match

Access the ISIR Inst SearchMatch page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **ISIR Data Load Parameters**, and then **ISIR Inst SearchMatch**).

This example illustrates the fields and controls on the ISIR Inst SearchMatch page. You can find definitions for the fields and controls later on this page.

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You determine how restrictive to make the Matching process. The system searches on the match that you select by reviewing personal data until it finds a match. When the search and match process runs, the program starts with the first order number and moves through the order numbers until it finds a match. If the system finds no matches at any level, then the option that you selected in the **No Match Found** group box takes effect. To load all students into the system regardless of match, override the No Match Found level.

> **Note**
>
> The search match options apply only to ISIRs where no prior year ISIR was loaded into the database.

The system displays the aid year and school code.

Field or Control	Description
Search Parameter	A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.

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No Match Found

Field or Control	Description
New	Select an option to indicate the action the system takes when the Search Match process does not find a matching record. Values are: *Add:* The system adds the record to your database and generates a new ID for the ISIR. *Suspend:* The record is put in suspense. *Ignore:* The system sets the load status to *Skipped;* the ISIR is not loaded and is ignored by the load process.

The **Match(es) Found** group box has one row for each search match criteria order defined by your institution. Use the scroll bar to scroll through the levels of search criteria.

Match(es) Found

Field or Control	Description
Order Nbr (order number)	Displays a separate listing for each order number level of search criteria. The number of search match levels depends on the Search Parameter you selected to use for the ISIR load process.
One Match	For each order number, select an option to determine how the system processes the record. Values are: *Update:* The system updates the existing record with the matching record. *Suspend:* The system assigns a suspended load status to the matching record. *Ignore:* The system sets the load status to *Skipped.*
Multiple Matches	For each order number, select an option to determine what to do with the record. Values are: *Suspend:* The system assigns a suspended load status to the matching record. *Ignore:* The system sets the load status to *Skipped;* the ISIR is not loaded and is ignored by the load process.

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Field or Control	Description
******Parameters Refreshed******	The system displays this message in red text when the ISIR Institutional Search Match parameters are not saved or the global Search Match parameters are not changed since you last updated this page. If you change parameters and do not save the changes or if you make a change since the last changes were made, the system displays this message. You may want to create a Financial Aid-specific Search Parameter that can perform the ISIR search match function more efficiently than the provided PSCS_TRADTIONAL. For example, you may want to create a search parameter that contains a single search match order that does a last name, Social Security number, and student birth date match.

Related Topics

- Campus Community Fundamentals: Setting Up Search/Match

Setting Severity Levels for ISIR Reject Reasons

Access the ISIR Reject Reasons page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Maintain ISIR Comment Codes**, and then **ISIR Reject Reasons**).

The ISIR Message Tables component enables you to review delivered ISIR messages and assign a level of severity to each reject reason and comment code, to indicate the action required by financial aid staff.

> ⚠ **Warning**
>
> ISIR reject reasons and ISIR comment codes are defined by ED and are delivered to your institution with each academic year release update. You can update the message tables if the CPS/FPS modifies the values after their initial release.

The system displays the aid year and institution. PSUNV is the default institution for the ISIR reject reasons. You do not need to create records for your institution values.

ISIR Reject Reasons

Field or Control	Description
Code	Displays information assigned to the ISIR reject reason by ED. These codes appear on a student's SAR and ISIR.
Description	Displays the description, using the codes assigned to the ISIR reject reason by ED by default. The description and the accompanying code appear on a student's SAR and ISIR.

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Field or Control	Description
Severity Level	Indicates the level of importance of the reject reason and whether action is required. You can design local ISIR workflow processes using this field as criteria for ISIR review or communication with the student. Select from these values: *1 - Action Req:* Requires action. *0 - Ignore:* Requires no action.

Setting Severity Levels for ISIR Comment Codes

Access the ISIR Comments page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Maintain ISIR Comment Codes**, and then **ISIR Comments**).

The system displays the aid year and institution. PSUNV is the default institution for the ISIR comment codes. You do not need to create records for your institution values.

The Campus Solutions system compares ISIR comments on the student's record to the ISIR Comment table to evaluate eligibility for federal aid. Each comment is associated with a severity level. The severity level associated with the **DB Match Use** field triggers how the system handles the database match during packaging. As an administrator, you can reset the predefined severity level value assigned to each ISIR comment.

ISIR Comment Codes

Field or Control	Description
Code	Displays codes from a table delivered by ED. These codes may appear in Part 1 of a student's SAR or ISIR.
Description	Displays a description of the associated code from a table delivered by ED. The description may appear in Part 1 of a student's SAR or ISIR.
Severity Level	Indicates the level of importance that you want to attach to the comment code and whether action is required. You can design local ISIR workflow processes using this field as criteria for ISIR review or communication with the student. Select from these values: *0 - Ignore:* Requires no action. *1- Action Required:* DB Match problem requires action. *2 - Action required.* SAR C Flag on file. Based on these severity levels, if a student has an ISIR comment with a severity level 1 or 2 and the **DB Match Use** value is not blank, the system does not award the student federal aid until the errant condition, and therefore the corresponding ISIR comment, are resolved.

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Field or Control	Description
DB Match Use	The **DB Match Use** value corresponds to a ED database match. **Note: INAS Calc Type** selection is restricted to *IM* for the latest available processing year until FM NAC is delivered. **Note:** You can use the override option on the Database Matches page to override this functionality. For example, if the student has an ISIR comment with a severity level of 1 or 2, you can invoke the corresponding database match override to make the student eligible for federal aid.

See Reviewing the U.S.E.D. Database Match Process.

Setting Up Financial Aid EDI Transactions

Access the Financial Aid EDI Transactions page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Maintain EDI Transactions**, and then **Financial Aid EDI Transactions**).

Field or Control	Description
EC Transaction ID (electronic commerce transaction ID)	Displays the electronic commerce name specified for the EDI file.
In/Out	Displays whether the file is inbound (to be loaded into the database) or outbound (generated by the system to be sent to an external trading partner).
Description	Displays the description of the EDI file.
FA Use (financial aid use)	Displays the financial aid business process that the EDI file supports. Values are: *Blank, CommonLine, Direct Lending, ISIR,* and *Pell.*

The system displays EDI transactions with FA Use value of **ISIR** in the ISIR EC Queue Review page and displays EDI transactions with FA Use value of **CommonLine** and **Direct Lending** on the Loan EC Queue Review page.

If you set the **FA Use** field to *blank,* the system does not display those EDI transactions review page. You might do this with prior year EDI transactions that you no longer want to appear.

Setting Up Commit Levels for COBOL Processes

Access the Setup Commit Levels page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Commit Levels**, and then **Setup Commit Levels**).

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Field or Control	Description
Fin Aid Default Commit Level (financial aid default commit level)	Enter the default commit level, which indicates to the system when to save records while processing for any process that does not have a specific commit level assigned to it on this page. For example, if you enter *50*, the system saves the processing after every 50 records that it processes. If you do not enter a value in this field, the default commit level is *0*, which directs the system to save after each record is processed.
Process Name	Enter or select the process name for which you want to set commit levels. Insert additional rows for each process for which you want to set a commit level.
Commit Level	Enter a numeric value for the commit level for each process. The commit level instructs the system when to save records while it is running a process. For example, if you enter *50*, the system saves the processing after every 50 records that it processes.

> **Note**
>
> The appropriate commit levels to use depend on your production environment, such as the type of database, size of database, and hardware. Commit levels should be set by knowledgeable technical staff only.

Reviewing Cross-References

To set up cross-references, use the ISIR/SAR Cross Reference component (ISIR_SAR_XREF) and the Institutional Cross Reference component (INST_XREF).

This section discusses how to:

- Review ISIR SAR cross-references.
- Review institutional application cross-references.

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Pages Used to Review Cross-References

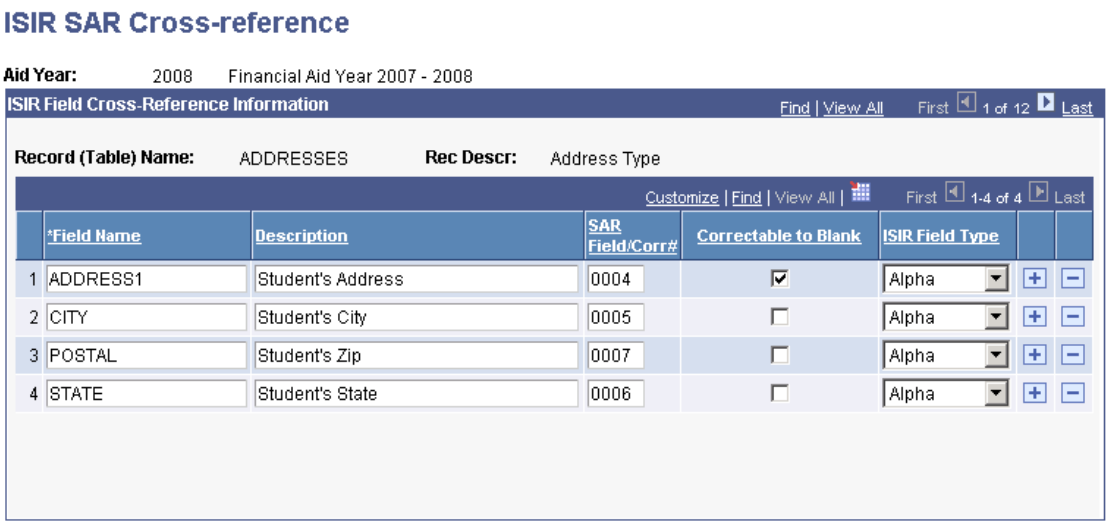
Page Name	Definition Name	Navigation	Usage
ISIR SAR Cross-reference	ISIR_SAR_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **ISIR/SAR Cross Reference**, and then **ISIR SAR Cross-reference**	Review ISIR/SAR cross-references. This page is used by several background processes and online pages to link the ISIR/FAFSA field number and ISIR record field number to the table and column name in the Campus Solutions system. It cross-references the field name and description to the ISIR/FAFSA record field number.
Institutional Cross Reference	INST_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Institutional Cross Reference**	Review institutional application cross-references and audit changes to the institutional application pages. Several background processes and online pages use this table to link the institutional application field number and record field number to the table and column name in the Campus Solutions database. It cross-references the field name and description to the institutional record field number.

Reviewing ISIR SAR Cross-References

Access the ISIR SAR Cross-reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **ISIR/SAR Cross Reference**, and then **ISIR SAR Cross-reference**).

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

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Warning

The ISIR SAR Cross-reference page is delivered annually with preloaded values and should not be changed or modified in any way.

The system displays the aid year, record (table) name, and record description.

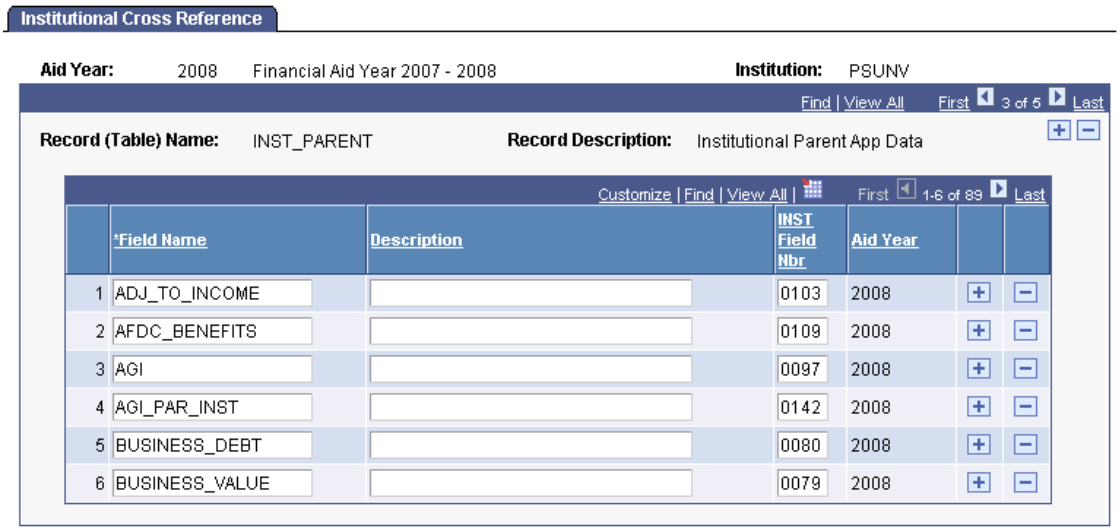
Field or Control	Description
Field Name	Displays the names of the valid fields in the Financial Aid system for the table.
SAR #	Displays the CPS/FPS field reference number used for correcting ISIRs and identifying highlighted fields on the ISIR/SAR for the aid year.
Correctable to Blank	If selected, indicates that the field can be reported as a blank value in the ISIR correction record.
ISIR Field Type	Displays the description for the ISIR field type: *Alpha:* Alpha Numeric *MMDDYY:* Date (MMDDYY) *MMYY:* Date (MMYY) *Numeric* *Signed Num:* Signed Numeric *Batch Year:* Date (Batch Year) *Mixed Case*

Reviewing Institutional Application Cross-References

Access the Institutional Cross Reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Institutional Cross Reference**).

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



Warning

The Institutional Cross Reference page is delivered annually with preloaded values. These values should not be changed in any way.

The system displays the aid year, academic institution, record (table) name, and record description.

Field or Control	Description
Field Name	Displays the names of fields in the Financial Aid system for the table.
Description	Displays the field contents.
INST Field Nbr (institutional application field number)	Displays the institutional application field number that corresponds to the field in the Financial Aid system.
Aid Year	Displays the aid year of the institutional application field number.

Setting Up PROFILE Data Load Parameters

To set up PROFILE data load parameters, use the PROFILE Load Parameters component (INST_LOAD_CONTROL).

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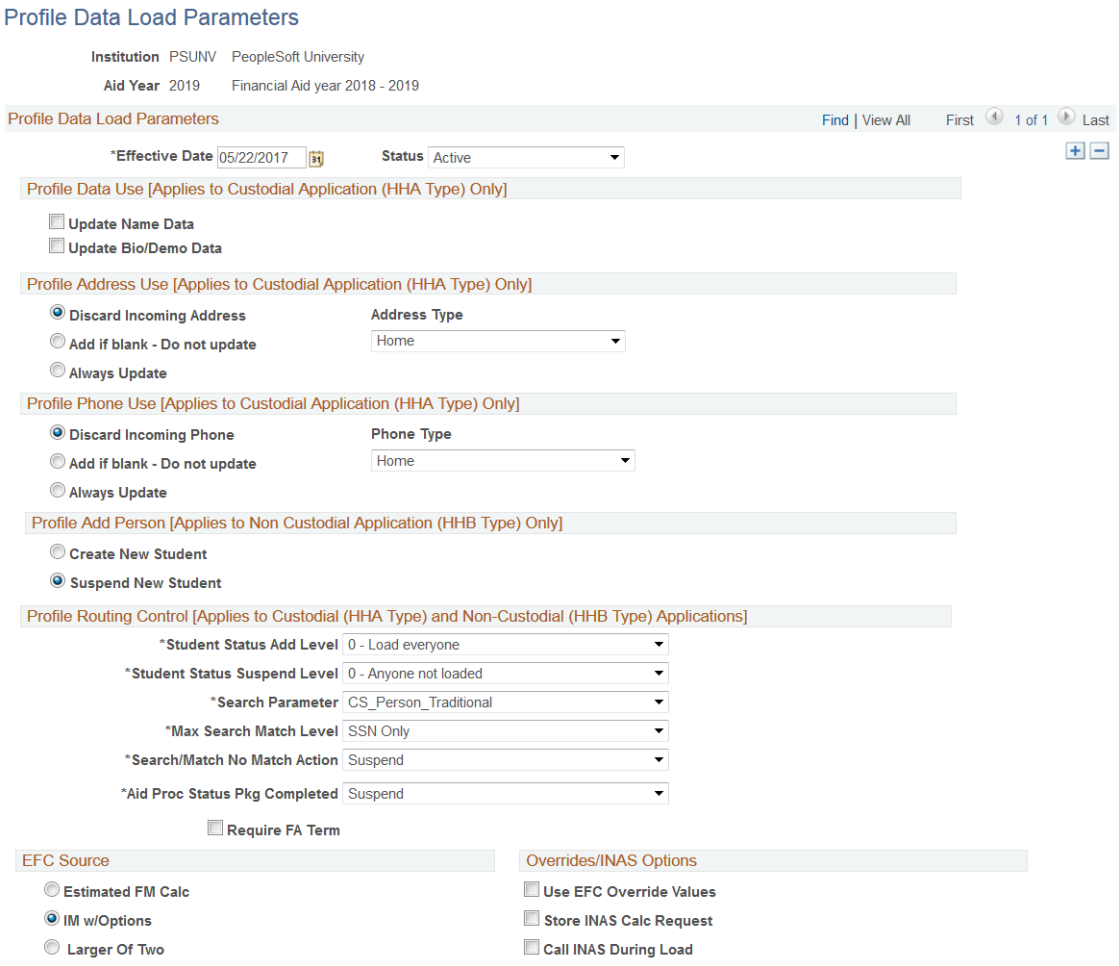
Page Used to Set Up PROFILE Data Load Parameters

Page Name	Definition Name	Navigation	Usage
PROFILE Data Load Parameters	INST_LOAD_CNTRL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **PROFILE Load Parameters**, and then **PROFILE Data Load Parameters**	Set up the PROFILE application parameters for your institution. PeopleSoft Campus Solutions supports the College Board *CSS PROFILE* application.

Setting Up PROFILE Data Load Parameters

Access the PROFILE Data Load Parameters page **Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **PROFILE Load Parameters**).

This example illustrates the fields and controls on the PROFILE Data Load Parameters page. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> When this page opens an error message might display such as "Fields Parameter Code and Max Search Match Level reset to blank. (14404,413) The Search Match Criteria has been modified more recently than the effective date on this page. Please insert a new effective-dated row on this page or update the current effective data to the present day. Then reenter the value for the field(s) mentioned above." This error message displays when the Search Match parameter criteria was set up after the effective date of this run control. By adding a new effective-dated row and resetting the fields mentioned in the error message, the PROFILE load process uses valid search match criteria.

> **Note**
>
> Some setup information applies to only custodial parent application data (HHA), only non custodial parent application data (HHB), or both. Each section notes the applicability of the setup.

Field or Control	Description
Effective Date	Select an effective date for this aid year.
Status	Select a status for this aid year.

PROFILE Data Use

> **Note**
>
> These fields only apply to custodial parent application data (HHA).

Field or Control	Description
Update Name Data	Select to enable PROFILE name data to update Campus Community data.
Update Bio/Demo Data (update biographical and demographic data)	Select to enable PROFILE biographical and demographic data to update Campus Community data. Updated fields include Marital Status, Gender, DOB, Citizenship, and Visa

PROFILE Address Use

> **Note**
>
> These fields only apply to custodial parent application data (HHA).

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Field or Control	Description
Discard Incoming Address	Select if you do not want to update Campus Community address information.
Add if blank - Do not update	Select to have the system add the address from the file with the address type that appears in the **Address Type** field when there is no Campus Community address information. For example, if *PERM* appears in the **Address Type** field, the system identifies and adds the address as a permanent address type.
Always Update	Select to always update Campus Community address information. When selected, the designated address is updated with the value specified in the **Address Type** field.
Address Type	Select the **Address Type** to be used when either adding or updating an address. **Note:** Don't select **Mailing Address** as Profile data doesn't include a Mailing Address.

PROFILE Phone Use

> **Note**
>
> These fields only apply to custodial parent application data (HHA).

Field or Control	Description
Discard Incoming Phone	Select if you do not want to update Campus Community phone number information.
Add if blank - Do not update	Select to have the system add the phone number from the file with the phone type that appears in the **Phone Type** field when there is no Campus Community phone information. For example, if *Mobile* appears in the **Phone Type** field, the system identifies and adds the address as a mobile phone type.
Always Update	Select to always update Campus Community phone information. When selected, the designated phone number is updated with the value specified in the **Phone Type** field.
Phone Type	Select the **Phone Type** to be used when either adding or updating a phone number.

PROFILE Add Person

> **Note**
>
> These fields only apply to non custodial parent application data (HHB). If left blank, the default behavior is `Suspend New Student`.

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Field or Control	Description
Create New Student	Select to *create* a new student based on data in the Non Custodial Parent PROFILE (HHB) application under the following conditions: • The student doesn't exist in the system. • The Non Custodial Parent PROFILE (HHB) application is received before the Custodial Parent PROFILE (HHA) application. • The student passes all requisite PROFILE Routing Controls.
Suspend New Student	Select to *suspend* a new student based on data in the Non Custodial Parent PROFILE (HHB) application under the following conditions: • The student doesn't exist in the system. • The Non Custodial Parent PROFILE (HHB) application is received before the Custodial Parent PROFILE (HHA) application. • The student passes all requisite PROFILE Routing Controls.

PROFILE Routing Control

> **Note**
>
> These fields apply to both custodial parent and non custodial parent application data (HHA and HHB).

Field or Control	Description
Student Status Add Level	Select an add level to define the students for whom you want to process PROFILE data. This is where you see the numeric hierarchy affect admit levels. Values are: *0 - Load Everyone* *1 - Recruits or higher* *2 - Inactive Admits or higher* *3 - Applicants or higher* *4 - Active Admits or higher* *5 - Accepted/Continuing only*
Student Status Suspend Level	Select a level to define the PROFILE records to retain in the PROFILE Suspense table. You can select these students again in future data loads. Values are: *0 - Anyone not loaded* *1- Recruits or higher* *2 - Inactive Admits or higher* *3 - Applicants or higher* *4 - Active Admits or higher* *5 - Accepted/Continuing only*

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Field or Control	Description
Search Parameter	A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule. The delivered Campus Solutions search Parameter is called PSCS_TRADTIONAL.
Max Search Match Level	Select a maximum search match level, which determines how restrictive the Matching process should be. The values in this field depend on the value selected in the Search Parameter field. The system searches on the match level that you select, plus the more restrictive matches that come before it. For example, if you select a match of *20* (SSN Only in PSCS_TRADTIONAL), the search process first uses the more restrictive match of *10*—or any match number less than *20*—that you set up in the system. Values are: *Name, Addr, City, Bday, Gender, SSN* *SSN Only* *Name, Bday, Gender* *Name, Gender* *Name Only*
Search/Match No Match Action	Select the action to take when a record fails the Search/Match criteria designated in the **Search Parameter** Values are: *Suspend* — Move the record into the Suspense Management table *Allow Add if Eligible* — Consider the record for the **Add Level Rules** and/or **Suspense Level Rules.**
Aid Proc Status Pkg Completed (aid processing status is packaging completed)	Select the action to take when the process encounters a record for a student whose **Aid Processing Status** is *Packaging Completed.* Values are: • *Suspend* — Move the record into the Suspense Management table. The **Aid Processing Status** remains *Packaging Completed.* • *Load/Reset Status to Applied* — Load the record and reset the **Aid Processing Status** to *Applied.*

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Field or Control	Description
Require FA Term (require financial aid term)	Select to require that at least one FA Term record for the corresponding Aid Year must exist in order for the record to be considered for addition to the Institutional Application tables. **Note:** Other PROFILE Routing Controls must be met whether **Require FA Term** is selected or not for a record to be considered to be added to the Institutional Application tables.

EFC Source

Indicate the source to use by selecting **Estimated FM Calc** (estimated Federal methodology calculation) **IM w/Options** (institutional methodology with options), or **Larger of two.**

Overrides/INAS Options

Field or Control	Description
Use EFC Override Values (used expected family contribution override values)	Select to enable the Load Program and the Suspense/Move Program to evaluate the activation of the **Use EFC Override Value** check box on the INAS Institutional Extension pages and load those values into the **Contribution for Student** row of the Computation Data page. The override values are identified with an **O** on the Computation Data page.
Store INAS Calc Request (store institutional need analysis system calculation request)	Select to insert the student into the INAS Calculation Request (INAS_CALC_RECS) table during the PROFILE Load. The Mass EFC Calculation process calculates an EFC for any student found on the INAS Calculation Request (INAS_CALC_RECS) table. Defaults to selected.
Call INAS During Load (call institutional need analysis system during load)	Select to perform INAS calculation, based on the EFC Global Policy options for the corresponding Aid Year, during PROFILE Data Load.

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22

Processing Federal Financial Aid Applications

Understanding Federal Financial Aid Application Processing

To coordinate incoming and outgoing data files with the U.S. Department of Education's (ED's) Central Processing System (CPS)/FAFSA Processing System (FPS), you transmit data using ED's Student Aid Internet Gateway (SAIG) communications software, vendor supplied software, or software developed by your own institution.

CPS/FPS sends the student's FAFSA information contained in the ISIR data record and you load the data into the Financial Aid system. You can then override assumptions and rejects, add your institution to a student's ISIR, make ISIR corrections, exchange data with the CPS/FPS, validate and manage corrections, view EFC/SAI status, and review comments.

Financial Aid application processing consists of inbound and outbound processing. Inbound processing refers to ISIR records sent to your institution from the CPS/FPS. Outbound processing refers to ISIR correction records and requests to add your institution to the student's ISIR.

To load financial aid application information from the ISIR, use inbound processes:

1. When you receive a download from the CPS/FPS, run the FA Inbound process to deposit the entire batch into ISIR staging tables.

   NSLDS and some Direct Loan files are loaded using this process.

2. Run the ISIR Load process (FAPSAR00) to load the files from the ISIR staging tables into the database.

   The ISIR Load process uses your ISIR data load parameters and process demographic settings. ISIR records that are not loaded are marked as suspended for manual review or are automatically discarded based on your institution's data load parameter settings.

To send out ISIR corrections or add institution requests to the CPS/FPS, use outbound processes:

1. Run the ISIR Correction Outbound (FAPCOR00) process to gather all the data files marked to send.

   This process selects corrected ISIR records, requests to add the institution, and ISIR signatures records and copies them into the outbound staging tables.

2. Run the inbound ISIR Correction Errors process (FASAREXX) to evaluate record level error files that have been received from the CPS/FPS (message classes CORE0XOP, EAPR0XOP, SIGA0XOP). If the file contains history correction errors, the process updates the matching Correction Management page records.

3. Run the FA Outbound process to select records in the outbound staging tables and generate ISIR correction and FAFSA Signature files for transmission to CPS/FPS.

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Processing Inbound Files

You load ISIRs from the CPS/FPS, create and send ISIR corrections and FAFSA signature files to the CPS/FPS. The FA Inbound process automatically determines the type of file from CPS/FPS and loads the file into the inbound staging tables.

First, the FA Inbound process loads records from the CPS/FPS files into the ISIR EDI staging tables. Then the ISIR Load process loads the data from the staging tables into the database using the ISIR data load parameters; only files meeting the criteria are moved into the database.

The FA Inbound process generates artificial header and trailer information for the files loaded into the staging tables. The header row contains a batch number assigned to the loaded file. The trailer row contains a count of the number of ISIRs in the file. You can view this information in the ISIR Inbound Summary components.

This section provides an overview of the FA inbound process and describes how to load ISIR files.

Pages Used to Process Inbound Files

Page Name	Definition Name	Navigation	Usage
FA Inbound	RUNCTL_FA_INBOUND	**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**	Load external financial aid electronic commerce files.
ISIR File Load	RUN_CNTL_FAPSAR00	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **Process ISIRs**, and then **ISIR File Load**	Load the ISIR records from the ISIR staging tables into the database using the rules that you set up in the ISIR Data Load Parms page. This page supports multiple ISIR load criteria settings for a single run control ID.
ISIR File Review	FA_EDI_ECQUEUE	**Financial Aid**, and then **File Management**, and then **Review CPS/FPS/ NSLDS Transactions**, and then **ISIR File Review**	Review all inbound and outbound files to the CPS/FPS. You can use the search page to select the type of CPS/FPS files to review.
Financial Aid EDI Transactions	FA_ECTRANS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **Maintain EDI Transactions**, and then **Financial Aid EDI Transactions**	Control the EDI transactions that can be viewed in the ISIR EC Queue Review and Loan EC Queue Review pages.

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Page Name	Definition Name	Navigation	Usage
ISIR Suspense Detail Report	SFA_RUNCTL_FA927	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **ISIR Suspense Detail Report**	Generate a report of all suspended ISIRs for a selected Aid Year.

Understanding the FA Inbound Process

The FA Inbound process reads the file and searches for the listed files using the path defined in the file list. After processing the file list, the system creates a new file in the same directory as the original file. The name of the new file is the name of the file list with an appended date/time stamp. For example, if LIST1.TXT were processed September 1, at 9 A.M., the name of the new file is LIST1.TXT20040901090000.

If an error is found for a file in the list file, the FA Inbound process loads the previous files into the database and then stops processing. The files after the file in error are not processed.

The new file lists the files that were successfully processed, and, if an error is found, the file in error. The error file is listed last with the message "Error not processed." appended to the file path. For example, if LIST1.TXT contained five ISIR files, and the third file, ISDF05OP.003, had an error, the LIST1.TXT20040901090000 file would read:

\\JSERVER1\2005\ISDF05OP.001

\\FILESERV\2005\ISDF05OP.002

Error not processed: C:\ISIR\2005\ISDF05OP.003

The remaining two files defined in the file list were not processed and are not listed.

Use the message log to view the files that the system loaded successfully or unsuccessfully and any error messages. Use the File/Log Viewer to read these messages.

> **Note**
>
> Even when a problem occurs with the load process, the Process Monitor might display the run status as Success. To determine whether all files in a file list were successfully processed, open the data stamped list file and verify that the last row in the file does not read: *Error not processed.*

The FA Inbound process assigns an ISIR TG number to ISIR files that are loaded into the staging tables. The ISIR File Load process selects ISIR files with matching TG numbers to process. All others are ignored until the ISIR load is run with the same TG number.

ISIR files may contain a request title record as the first row in the file if schools use queries to request ISIRs from the datamart. A blank first row may be present for schools that do not use queries. The FA Inbound process skips these rows.

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> **Note**
>
> Because the FA Inbound process reads the first position of the ISIR file to determine the type of ISIR, if you use the request title functionality at the datamart, do not begin the query name with a number. This may cause the request title row to be loaded into the staging tables, but it does not stop the ISIR rows in the file from being loaded nor does this affect the further processing of the ISIRs.

Processing ISIRs for Multiple Schools at the Same Destination

For institutions with multiple valid school codes, the ISIR File Load process attempts to identify and assign the owning school code. For example, Institution PSUNV receives ISIRs for school codes E01300 and E01301. A student completes the FAFSA and lists both schools as recipients. The electronic destination receives an ISIR for each valid school code.

> **Note**
>
> All your valid school codes *must* be set up in ISIR Data Load Parameters and be 'Active'. See Setting Up Financial Aid Processing.

> **Note**
>
> All ISIR files must be imported to the ISIR record staging table.

Using ISIR records imported into the ISIR record staging table with FA INBOUND process, the system compares any identified school codes found in the staging table (across ISIR records) to the ISIR Data Load parameter records for the aid year and institution:

1. If a single school code match exists, the system processes the ISIR with the data load parameters of the matching school code
2. If no match exists, the ISIR errors with a message of 2 – Invalid School Code.
3. If multiple matches of the ISIR Data Load parameter records exist,
   a. The system checks for a previously loaded ISIR and uses the owning school code for the most recent loaded ISIR.
   b. Otherwise, the ISIR suspends with a message of "S – Unable to Select School Code".

      For ISIR records that are suspended with "Unable to Select School Code", you can determine the correct Owning School Code, manually load the associated ISIR on the ISIR Suspense Management page, and reprocess them.

      Once an Owning School Code is established for an Aid Year, any other ISIRs trying to load with a different school code suspend with a message of "Different School Code Loaded".

Processing Multiple Institution Files

The ISIR load process evaluates each ISIR record to determine the appropriate recipient of the file. In most cases, by checking the school codes listed on the **ISIR** and the **ISIR ETI** and **Multi School Flag** fields, the process is able to determine the correct school code and institution to

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process the ISIR. One condition exists for which the process is unable to do so. Assigning a TG number during the FA EC Inbound process resolves this condition.

This condition occurs when a customer is set up with multiple institutions, where each institution is represented by a separate TG destination number, and where a student completes a FAFSA for schools belonging to separate TG numbers for the same customer.

For example, State University is comprised of two institutions and is set up as follows:

- Institution: SUWEST (TG number: 52222, School code: E52222)
- Institution: SUEAST (TG number: 53333, School code: E53333)

New students often apply for admissions to both schools and submit their FAFSA information to both. As a result, State University receives separate, identical ISIR records for these students (one per TG number). This is because the two institutions represent separate TG numbers, and the multi-school flag fields are not populated. Currently, when the ISIR load is run for one institution, the system processes both ISIRs of these students at the same time, where one file is processed with the incorrect ISIR Data Load parameters and can be loaded to the incorrect institution and owning school code.

By assigning the correct TG number for each ISIR file that is loaded, the condition described above is corrected.

> **Note**
>
> It is the responsibility of the school to assign the correct TG number when loading ISIR files into the staging tables.

Identifying Correction ISIRs Not Initiated by the School

The system performs the following evaluation to identify ISIRs corrected by the recipient school. The system checks the ISIR ETI field value and only those records with a value of 0, 2, 4, or 6 are selected. This indicates that the recipient school initiated the correction record, and you can process the ISIR normally. For all other values, an additional check against the **ISIR Source of Correction** field is performed to determine whether the ISIR was initiated by the student, another school, or the CPS/FPS.

You can control which of these correction ISIRs are processed with the Suspend Student Initiated and Suspend Other School Initiated load options for corrected ISIRs. You may want to suspend all non-school initiated ISIRs first and then review the fields that were corrected in the nn/nn ISIR Suspense Management, Corrected fields page before determining how to process the record.

> **Note**
>
> Corrected ISIRs initiated by the CPS/FPS are treated as other school initiated.

Processing Corrections

Because application and correction ISIRs can be grouped in the same file, running the ISIR load process with only the Applications record type option selected causes the process to ignore any corrected and system generated ISIRs in the file. The load status of these skipped records remains unchanged until you use the correct record type option to process these records.

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A school-initiated correction is processed with the Suspend on EFC/SAI Mismatch load option set. If no previously loaded ISIR exists, the process treats the condition as an application ISIR and follows the application ISIR load parameter settings. This allows initially rejected ISIRs corrected by the school to load as initial application ISIRs.

If you process a student initiated corrected ISIR with the Suspend Student Initiated ISIR load option deactivated, or process a non-school initiated corrected ISIR with the Suspend Other-School Initiated option deactivated, the system treats the ISIR as an application ISIR and follows the application ISIR load parameter settings. The correction ISIR load parameters are ignored.

Any ISIR that has the duplicate SSN indicator set always suspends. Because this indicates that the social security number on the ISIR has been used by another application, users should evaluate the record before loading the ISIR in the suspense management component.

Importing Federal Data Files

Access the FA Inbound page (**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**).

Field or Control	Description
Run Option	Select one of the following run options: *Single File:* The file listed in the **Inbound File** field is one of the supported EDI files. This is the default. *File List:* The file listed in the **Inbound File** field is a list of files to be processed.
ISIR TG Number	Assign the appropriate ISIR TG number for the ISIRs that are loaded. When processing a file list, the system assigns the same TG number to all ISIRs in the list.

The FA_INBOUND process supports the loading of most ISIR file types for the current and following aid year as well as the following additional file types.

File Type	Message Class/Input File Name
Import School Account Statement (Fixed-Length, Disbursement Level Loan Detail)	DSDF07OP
Import School Account Statement (Fixed-Length, Loan Level Loan Detail)	DSLF07OP
Entrance Counseling Results (Fixed-Length)	DECF07OP
Exit Counseling Results (Fixed-Length)	DLFF07OP
NSLDS Transfer Alert	TRALRTOP
NSLDS Financial Aid History	FAHEXTOP

Loading ISIR Files

Access the ISIR File Load page (**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **Process ISIRs**, and then **ISIR File Load**).

The ISIR Load process uses the Aid Year and Institution values you select to identify the appropriate ISIR Data Load Parameters to use during the run.

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Field or Control	Description
TG Number	Enter the TG Number of the ISIRs you wish to process. The TG Number is assigned to ISIR records during the FA Inbound process.
Load ISIRs, **Load System Generated ISIRs**, **Load ISIR Corrections**	Select the type of ISIRs you want to process. The ISIR load process determines the type of ISIR record (applications, system generated or corrections) by reviewing each ISIR. The system does this by reviewing the Transaction Data Source/Type field on the ISIR.

For more information about Determining the ISIR Type During the ISIR Load:

See Understanding Financial Aid Processing Setup.

Managing Suspended ISIRs

All ISIR records are loaded into the ISIR staging tables before moving into the database. These records are never deleted. You can look at and review an entire batch of ISIR records or you can look at an individual student's ISIR processing information.

After the ISIR file has been loaded from the staging tables to the database, you can view the ISIR data from the ISIR Data Corrections component.

This section discusses how to:

- Use ISIR suspense management.
- View detailed status information from the ISIR Load process.
- View information generated by CPS/FPS for the ISIR.
- View ISIR reject codes.
- Review corrected fields.
- Manage ISIRs suspended in batch.

Pages Used to Manage Suspended ISIRs

> **Note**
>
> The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for two active aid years.

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Page Name	Definition Name	Navigation	Usage
ISIR Suspense Management nn/nn	ISIR_SUSP_CNTRPIAnn	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **20nn-20nn Suspense Management**, and then **ISIR Suspense Management nn/nn**	Review all ISIR records processed by the FA Inbound and FAPSAR00 processes. ISIRs from batches that have been set to Processed in the ISIR EC Queue Review page are not viewable on this page.
View ISIR Load Information	ISIR_STAGEINF5_SEC	Click the **ISIR Load Information** link on the ISIR Suspense Management nn/nn page.	View detailed status information generated by the FAPSAR00 process for the selected ISIR.
CPS/FPS Generated Fields	ISIR_CPS_GEN_INFnn	Click the **CPS/FPS Generated Data** link on the ISIR Suspense Management nn/nn page.	View information generated by CPS/FPS to assist in resolving suspended ISIRs.
Reject Reasons	ISIR_SUSP00REJ_SEC	Click the **ISIR Reject Reasons** link on the ISIR Suspense Management page.	View ISIR reject codes.
Corrected Fields	ISIR_CORR_SEC	Click the **Corrected Fields** link on the ISIR Suspense Management page.	Review which fields were corrected in the current ISIR. This link is only available if corrections were made.
ISIR Inbound Load Summary	ISIR_nn_IN_SRCH	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **20nn-20nn ISIR File Data**, and then **ISIR Inbound Load Summary**	View processing information for all ISIRs within a single batch file. The page displays processing information for each ISIR record in the ISIR staging tables. View the load status to determine whether the record has been loaded into the database. If the file is suspended or erred after the ISIR Load process runs, view the reason. The page also provides data to help associate the ISIR record with a student.
Header and Trailer Data	ISIR_nn_IN_HSEC	Click the **Header and Trailer Data** link on the ISIR Inbound Load Summary page.	View header and trailer information for the ISIR record.

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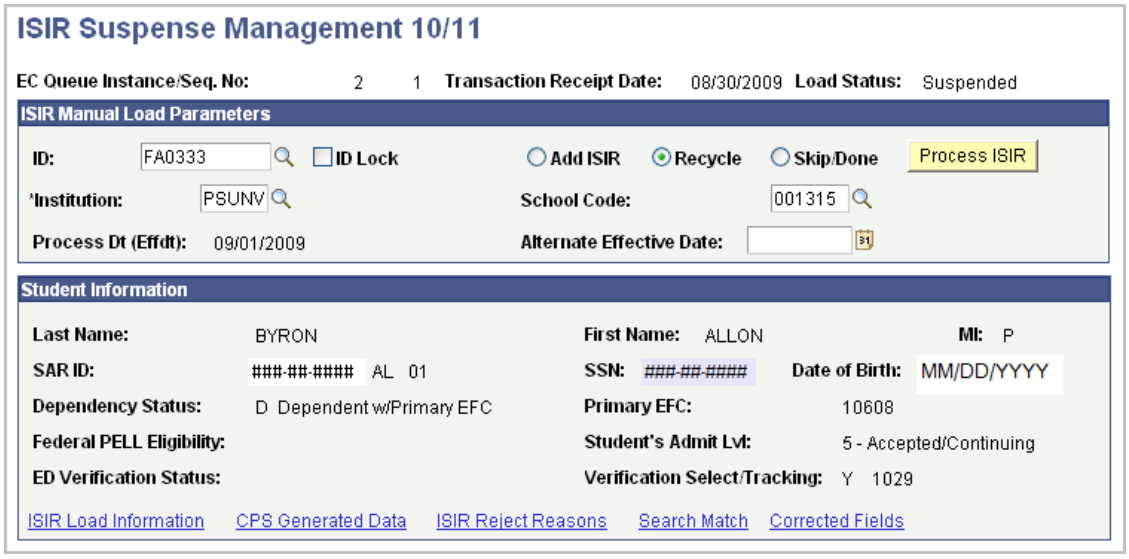
Page Name	Definition Name	Navigation	Usage
ISIR Data 1	ISIR_nn_IN_1SEC	Click the **ISIR Data 1** link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View the FAFSA questions reported on the ISIR, in the staging tables.
ISIR Data 2	ISIR_nn_IN_2SEC	Click the **ISIR Data 2** link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View Federal database match and FM computational information reported on the ISIR, in the staging tables.
NSLDS Data 1	ISIR_nn_IN_3SEC	Click the **NSLDS Data 1** link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View NSLDS history information reported on the ISIR, in the staging tables.
NSLDS Data 2	ISIR_nn_IN_4ASEC	Click the **NSLDS Data 2** link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View NSLDS history information reported on the ISIR, in the staging tables.
NSLDS ACG	NSLDS_ACG	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data** and click the NSLDS ACG tab.	Review a summary of a student's last three ACG awards.
NSLDS NSG	NSLDS_NSG	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data** and click the NSLDS NSG tab.	Review a summary of a student's last three NSG awards.
NSLDS Loan Detail	NSLDS_ERR_CD_SEC	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data** click the NSLDS Loan Detail tab, and then click the **Detail** link.	View NSLDS error codes, change flags, master promissory note flags, and alert file flags for the effective-dated row.

Using ISIR Suspense Management

Access the ISIR Suspense Management nn/nn page (**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **20nn-20nn Suspense Management**, and then **ISIR Suspense Management nn/nn**).

This example illustrates the fields and controls on the ISIR Suspense Management nn/nn page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
EC Queue Instance/Seq. No	This is the unique internal number associated with the batch to which this record belongs.
Load Status	Displays the status of the student's ISIR record in the ISIR staging tables after the ISIR load process runs. Values include: *Loaded:* The record successfully loaded from the ISIR staging tables into the database. *Error:* An error occurred while trying to match the record to a similar record in the database. For example, if a batch of ISIR records for the wrong CPS/FPS School Code was loaded into the ISIR staging tables, then every record in the batch errors. Errors have an additional Error Code message. Use the **ISIR Load Information link** to view detailed information. *Skip/Done:* Either the record has been successfully loaded into the ISIR application tables or the load program ignored the record because it was instructed to do so based on the ISIR data load parameters or manual set on the Suspense Management page. *Suspended:* The record did not load into the database from the ISIR staging tables because the record did not meet the ISIR load parameters. Use the **ISIR Load Information** link to view detailed information. *Unproc* (unprocessed): The FA Inbound process loaded the record loaded into the ISIR staging tables, but the ISIR Load process has not yet be run for the record.

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ISIR Manual Load Parameters

Field or Control	Description
ID	Click the search button to open a search page to assign student's ID to a suspended ISIR.
ID Lock	Select to load the suspended ISIR record into the database to a specified ID. This works with the **Add ISIR** load option. When both this check box and the **Add ISIR** option are selected, the system adds the ISIR data to the record identified in the ID field. For example, a record status is suspended but an ID is found for the record. Activating the ID lock causes the record to load if all other ISIR load parameters are met.
Institution	Select an institution to which the selected ISIR loads directly from this page.
Process Dt (Effdt) (process date effective date)	The date the CPS/FPS processed this ISIR record. The Transaction Processed date on the ISIR record is used to set the effective date of the ISIR record. View the effective date in the ISIR Corrections component. If an unloaded ISIR record has a transaction processed date that predates the existing active ISIR record, the record suspends with *suspend reason #7 – ISIR Tran Num Out of Seq.*
School Code	The owning school code of the ISIR that is set when you run the ISIR Load process. When the load process cannot determine the owning school code, the system suspends the ISIR with a suspend reason of *Unable to Select School Code.* Schools must enter the school code for which the ISIR is to be assigned. Use the ISIR Load Information page to view the school codes listed on the student's ISIR. **Note:** You must select one of the school codes entered by the student on the FAFSA or subsequent corrections to the student's ISIR may result in rejection by the CPS/FPS.
Alternate Effective Date	To load a suspended ISIR with suspend reason #7 into the database, change the effective date by entering an alternate effective date for this student. The alternate effective date should be greater than the current effective date. You cannot select a future date.
Add ISIR	Select this option to add the ISIR record to the database without enforcing the ISIR data load parameters. The system adds the ISIR record the next time the ISIR Load process runs. When you select *Add ISIR*, also select the **ID Lock** check box if you want to force the use of the ID in the ID field. Selecting the ID Lock prevents the system from looking for another ID when it is adding the ISIR. You can also use *Add ISIR* to reload previously loaded ISIR records.

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Field or Control	Description
Recycle	This is set by the ISIR load process if a student's ISIR cannot be loaded into the database because it does not fit the ISIR data load parameters. Select to cause the system to attempt to load the record the next time the load process runs.
Skip/Done	This is set by the system when the ISIR record has been added to the database. Select for any suspended ISIR records that you do not want loaded into the database.
Process ISIR	Click this button to run the ISIR load process for the selected ISIR that you want to load directly from this page. Unless you set the Add ISIR load option, the ISIR Load logic and load parameters for new ISIRs are performed.

Viewing Detailed Status Information from the ISIR Load Process

Access the View ISIR Load Information page (click the **ISIR Load Information** link on the ISIR Suspense Management nn/nn page).

> **Note**
>
> All suspended records have an ISIR Load Action status set to Recycle. All recycle status records that are not loaded are automatically reviewed the next time the ISIR Load process runs.

The ISIR Load process executes the ISIR load rules on individual ISIR records in the staging tables and tests for institutional review status, education verification completed, and for ISIR computation rejects.

The record is further verified to pass the ISIR routing control criteria. If it fails, the process posts a suspend status and suspend reason. Other load rules are performed on ISIR correction or system-generated files.

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Load Information

Field or Control	Description
Suspend Reason	Displays the reason the record was suspended and not loaded into the database and is blank if the record successfully loaded. Values include: *1 – Student Not Found (Max Match):* Search Match/Search Match By-pass failed to identify an ID that matches the ISIR. *2 – Inst Review Status:* This routing control option was triggered. *3 – Ed Verification Completed:* This routing control option was triggered. *4 – ISIR Compute Rejects:* This routing control option was triggered. *5 – Record Suspend Level:* The student's admit level. *7 – ISIR Tran Num Out of Seq:* An ISIR with a greater transaction number, but an earlier process date was encountered. *D – Duplicate SSN Indicated:* An ISIR suspends if the CPS/FPS reports that the SSN is used for another ISIR. *E – Calc Mismatch:* The Correction ISIR Suspend reason if you select this as a correction data load parameter. *G – System Generated Record:* All system generated ISIRs suspend if you select this data load option. *Unable to Select School Code:* ISIR record was suspended because the load process could not determine the owning school code.
Skip Reason	Displays the reason the record did not load into the database. Values include: *2 – Inst Review Status:* This routing control option was triggered. *3 – Ed Verification Completed:* This routing control option was triggered. *4 – ISIR Compute Rejects:* This routing control option was triggered. *5 – Record Suspend Level:* This routing control option was triggered. *7 – Search/Match option set to Discard/Skip:* ISIR skips if you select this Search/Match option. *G – System Generated Record:* All system generated ISIRs skip if you select this data load option.

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Field or Control	Description
Error Code	Displays the reason the **Suspend Reasons** is set to Error Encountered. Values include: *1 – Invalid SSN* *2 – Invalid School Code* *3 – SQL Error Encountered* *4 – Update/Add PD Error* (personal data error) *5 – Update/Add Address Error* *6 – Update/Add PS Names Error* *7 – Blank Date for Effective Date* *8 – Correction Record not found*
Max Match Level (maximum match level)	Indicates the search/match level at which the ISIR record was matched to an ID.
Process Instance	Displays the process number that the load process assigned when the process last ran. Use to view and print messages generated by the load process.
Process Date	The date that the load process last ran.

School Choices / Multiple School Flags

School code choices reported on the ISIR record are listed when the ISIR is intended for multiple CPS/FPS schools of the same destination number (TG number). This group box indicates the school that generated the ISIR transaction or was listed on the transaction and whether the ISIR type is a daily, requested, or pushed.

Each character in the six-character code corresponds to one of the six federal school code fields listed on the ISIR. Any value reported represents the ETI value of the matching school. Only the schools of the same destination have a value in the field.

Viewing Information Generated by CPS/FPS for the ISIR

Access the CPS/FPS Generated Fields page (click the **CPS/FPS Generated Data** link on the ISIR Suspense Management nn/nn page).

Field or Control	Description
Transaction Data Source/Type	Source of the current ISIR record (Electronic, Web Student, Web, FAA, Paper, CPS/FPS, FSAIC - Federal Student Aid Information Center) and the type of ISIR (application, correction, renewal, Signature page, and so on). The ISIR load process uses this value to determine which records are processed.
Application Data Source/Type	Source and type of the original ISIR transaction.
Address Only Change Flag	Indicates whether mailing or email information was the only item changed on the current ISIR.
CPS/FPS Pushed ISIR Flag	Indicates that CPS/FPS initiated the ISIR transaction. *Y* - Transaction is automatically sent to school in cases of an EFC/SAI change, SAR C change, or system-generated ISIR. ISIRs with a value of *Y* are treated as a system-generated ISIR.

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Field or Control	Description
NSLDS Post-Screening Code 1, NSLDS Post-Screening Code 2, and **NSLDS Post-Screening Code 3**	The NSLDS Post-screening field values on the ISIR.
Processed Record Type	Indicates whether the ISIR record is based on a Correction Application *(C),* a correction of an initial ISIR *(H),* or is an initial ISIR (blank).
History Correction Applied	ISIR transaction number of an earlier ISIR record from which the current ISIR data is derived.
Source of Correction	Who initiated the current corrected ISIR record: *A:* Applicant *D :* CPS/FPS *S:* School Blank if not a corrected ISIR.
Electronic Institution Ind (electronic institution indicator)	School that initiated the current ISIR.
Reprocess Code	Code that explains why the CPS/FPS generated a revised ISIR.
EFC/SAI Change Flag	Indicates whether the EFC/SAI has increased or decreased from the previous ISIR.
ISIR SAR C Flag Changed	Indicates that the SAR C Flag has changed from the previous ISIR transaction.
Rejected Status Change Flag	Indicates that the rejection status is set or removed from the previous ISIR transaction.
Verification Select Chng Flag (verification select change flag)	Indicates that the ISIR is now selected for verification when the previous transaction was not selected.

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Field or Control	Description
ISIR Elec Trans Indicator (ISIR electronic transaction indicator)	Indicates whether the school receiving the ISIR generated the transaction or was listed on the transaction. Also indicates whether the type of ISIR is a daily, requested, or pushed ISIR. ETI values: *Blank:* No destination code associated or school not participating. *0:* School generated transaction and is an ISIR daily school. *1:* School did not generate transaction and is an ISIR daily school. *2:* School generated transaction and is an ISIR request school. *3:* School did not generate transaction and is an ISIR request school. *4:* School generated transaction, is an ISIR daily school, ISIR is CPS/FPS pushed. *5:* School did not generate transaction, is an ISIR daily school, ISIR is CPS/FPS pushed. *6:* School generated transaction, is an ISIR request school, ISIR is CPS/FPS pushed. *7:* School did not generate transaction, is an ISIR request school, ISIR is CPS/FPS pushed. *8:* School did not generate transaction, is an ISIR daily school, ISIR is CPS/FPS pushed (system generated). *9:* School did not generate transaction, is an ISIR request school, ISIR is CPS/FPS pushed (system generated).

Viewing ISIR Reject Codes

Access the Reject Reasons page (click the **ISIR Reject Reasons** link on the ISIR Suspense Management page).

System displays all ISIR Reject Codes.

Field or Control	Description
Signature Reject EFC	For the 2023-2024 and prior Aid Years, displays the primary 9–month EFC when all data is provided except valid signatures.

Reviewing Corrected Fields

Access the Corrected Fields page (click the **Corrected Fields** link on the ISIR Suspense Management page).

The system reads the **Correction Flag** field on the ISIR and displays which fields were corrected. The system uses the ISIR/SAR Cross Reference setup data to display the field names on this page.

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Managing ISIRs Suspended in Batch

Access the ISIR Inbound Load Summary page (**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **20nn-20nn ISIR File Data**, and then **ISIR Inbound Load Summary**).

> **Note**
>
> Click the tabs in the scroll area to access multiple views of this page. Elements common to all views are documented in the section on common page information.

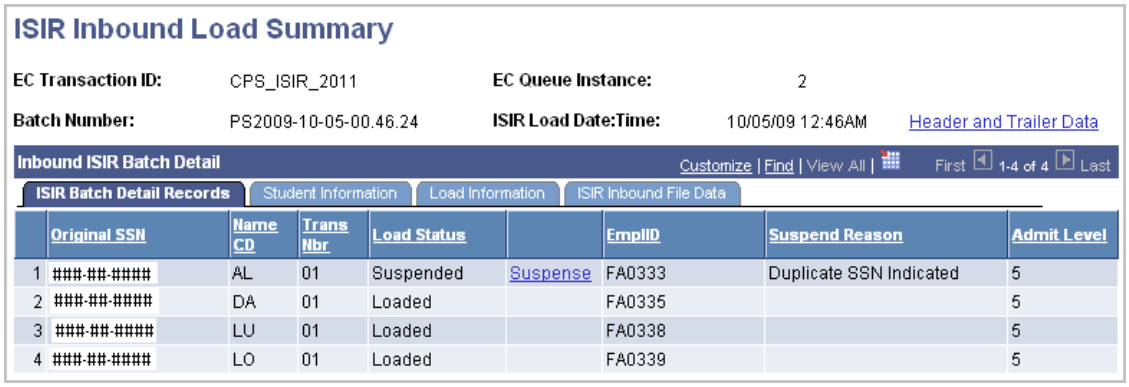
Common Page Information

Field or Control	Description
Original SSN (original Social Security Number)	The original Social Security Number entered on the FAFSA by the student.
Name CD (name code)	For 2023-2024 and prior Aid Years, the first two letters of the student's last name reported on the FAFSA used with the original SSN by the CPS to uniquely identify the student.
Trans Nbr (transaction number)	The transaction number of the ISIR.
Header and Trailer Data	Click this link to view header and trailer information for the ISIR record.

ISIR Batch Detail Records Tab

Access the ISIR Inbound Load Summary, ISIR Batch Detail Records subpage (click the **Student Information** tab on the ISIR Inbound Load Summary page).

This example illustrates the fields and controls on the ISIR Inbound Load Summary page, ISIR Batch Detail Records tab. You can find definitions for the fields and controls later on this page.



ISIR Inbound Load Summary

EC Transaction ID: CPS_ISIR_2011 EC Queue Instance: 2

Batch Number: PS2009-10-05-00.46.24 ISIR Load Date:Time: 10/05/09 12:46AM Header and Trailer Data

Inbound ISIR Batch Detail — Customize | Find | View All | First 1-4 of 4 Last

ISIR Batch Detail Records | Student Information | Load Information | ISIR Inbound File Data

	Original SSN	Name CD	Trans Nbr	Load Status		EmplID	Suspend Reason	Admit Level
1	###-##-####	AL	01	Suspended	Suspense	FA0333	Duplicate SSN Indicated	5
2	###-##-####	DA	01	Loaded		FA0335		5
3	###-##-####	LU	01	Loaded		FA0338		5
4	###-##-####	LO	01	Loaded		FA0339		5

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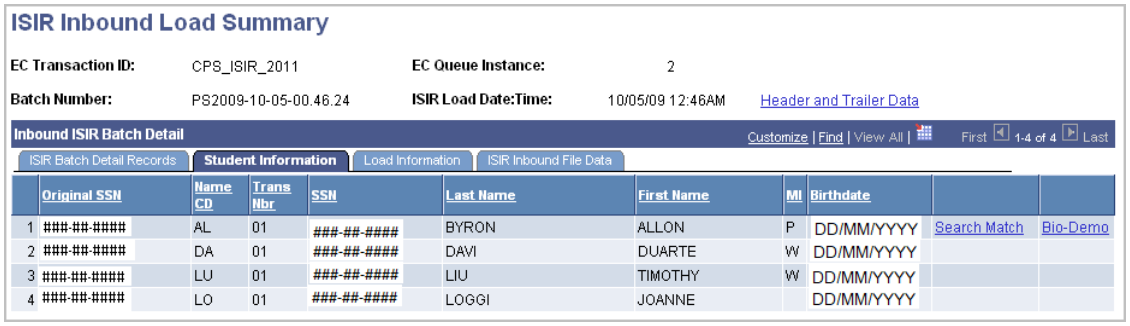
Field or Control	Description
Load Status	Displays the current status of the ISIR batch files loaded into the ISIR staging tables. *Loaded* indicates the ISIR batch file is loaded into the ISIR staging tables and will be loaded into the database the next time the ISIR Load process (FAPSAR00) is run. *Processed* indicates the ISIR batch file no longer needs to be reviewed by the ISIR Load process.
Suspense	Click this link for a suspense file to navigate to the ISIR Suspense Management nn/nn page.
EmplID	The ID number assigned to this student.
Suspend Reason	This field on the ISIR Batch Detail Records tab and the Load Information tab displays the reason the record was suspended and not loaded into the database. It is blank if the record was successfully loaded. If all records in the EC Queue instance are loaded, this field does not display. Values include: *1 – Student Not Found (Max Match):* Search Match/Search Match By-pass failed to identify an ID that matches the ISIR. *2 – Inst Review Status:* This routing control option was triggered. *3 – Ed Verification Completed:* This routing control option was triggered. *4 – ISIR Compute Rejects:* This routing control option was triggered. *5 – Record Suspend Level:* The student's admit level. *7 – ISIR Tran Num Out of Seq:* An ISIR with a greater transaction number, but an earlier process date, was encountered. *D – Duplicate SSN Indicated:* An ISIR suspends if the CPS/FPS reports that the SSN is used for another ISIR. *E – Calc Mismatch:* The Correction ISIR Suspended Reason if you select this as a correction data load parameter. *G – System Generated Record:* All system generated ISIRs suspend if you select this data load option.
Admit Level	Displays the admit level for this record.

Student Information Tab

Access the ISIR Inbound Load Summary page, Student Information subpage (click the **Student Information** tab on the ISIR Inbound Load Summary page).

This example illustrates the fields and controls on the ISIR Inbound Load Summary page, Student Information tab. You can find definitions for the fields and controls later on this page.

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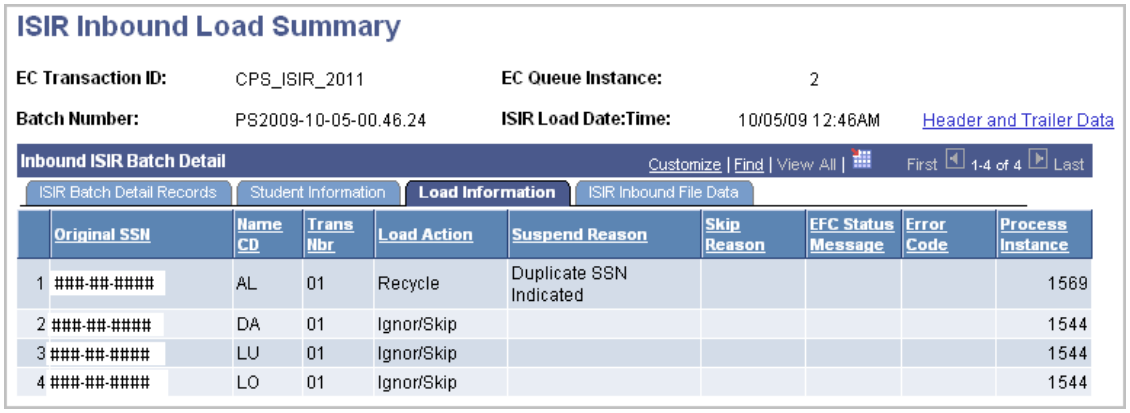
The **Last Name, First Name, MI,** and **Birthdate** values are from the ISIR.

Field or Control	Description
Search Match	Click this link to connect to the search match component.
Bio Demo	Click this link to connect to the PeopleSoft Campus Community Bio Demographic component.

Load Information Tab

Access the Load Information subpage (click the **Load Information** tab on the ISIR Inbound Load Summary page).

This example illustrates the fields and controls on the ISIR Inbound Load Summary page, Load Information tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Load Action	Values include *Add ISIR, Ignore/Skip,* and *Recycle.*

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Field or Control	Description
Suspend Reason	This field displays the reason the record was suspended and not loaded into the database. It is blank if the record was successfully loaded. If all records in the EC Queue instance are loaded, this field does not display. Values include: *1 – Student Not Found (Max Match):* Search Match/Search Match By-pass failed to identify an ID that matches the ISIR. *2 – Inst Review Status:* This routing control option was triggered. *3 – Ed Verification Completed:* This routing control option was triggered. *4 – ISIR Compute Rejects:* This routing control option was triggered. *5 – Record Suspend Level:* The student's admit level. *7 – ISIR Tran Num Out of Seq:* An ISIR with a greater transaction number, but an earlier process date, was encountered. *D – Duplicate SSN Indicated:* An ISIR suspends if the CPS/FPS reports that the SSN is used for another ISIR. *E – Calc Mismatch:* The Correction ISIR Suspended Reason if you select this as a correction data load parameter. *G – System Generated Record:* All system generated ISIRs suspend if you select this data load option.
Skip Reason	Reason the record did not load into the database, such as: *2 – Inst Review Status:* This routing control option was triggered. *3 – Ed Verification Completed:* This routing control option was triggered. *4 – ISIR Compute Rejects:* This routing control option was triggered. *5 – Record Add Level:* This routing control option was triggered. *7 – Search/Match option set to Discard/Skip:—* ISIR skips if you select this Search/Match option. *G – System Generated Record:* All system-generated ISIRs skip if you select this data load option.

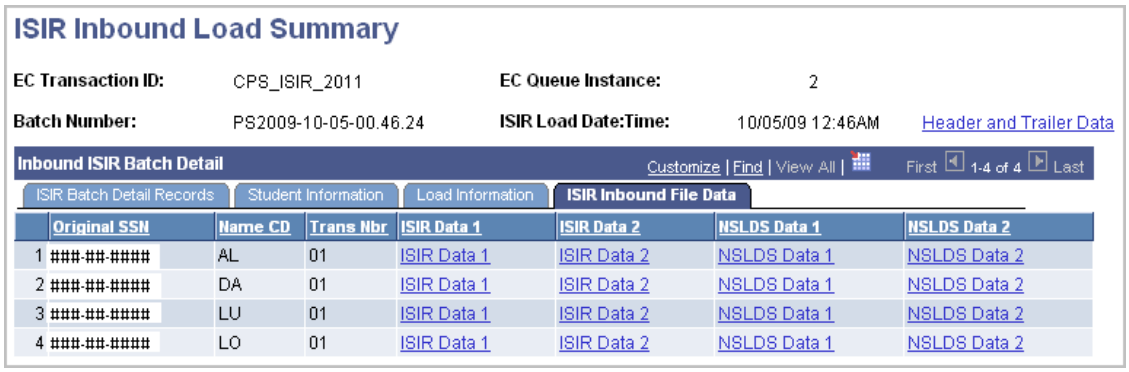
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Field or Control	Description
Error Code	The reason that the Suspend Reasons is set to Error Encountered. Values include: *1 – Invalid SSN* *2 – Invalid School Code* *3 – SQL Error Encountered* *4 – Update/Add PD Error* *5 – Update/Add Address Error* *6 – Update/Add PS Names Error* *7 – Blank Date for Effective Date* *8 – Correction Record not found.*
Process Instance	Number that the load process assigned when the process last ran. Use to view and print messages generated by the load process.

ISIR Inbound File Data Tab

Access ISIR Inbound File Data subpage (click the **ISIR Inbound File Data** tab on the ISIR Inbound Load Summary page).

This example illustrates the fields and controls on the ISIR Inbound Load Summary page, ISIR Inbound File Data tab. You can find definitions for the fields and controls later on this page.



Click the links for **ISIR Data 1, ISIR Data 2, NSLDS Data 1,** or **NSLDS Data 2** to view the ISIR information in the ISIR staging tables.

Correcting ISIRs

Use the ISIR Data Corrections component to review and correct FAFSA application information loaded from the ISIR. All ISIR field modifications are maintained in the ISIR correction audits component.

> **Note**
>
> This topic discusses ISIR corrections for the 2024-2025 and future Aid Years.

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This section provides an overview for processing ISIR corrections and discusses how to:

- Use the ISIR correction component.
- Review FAFSA student information.
- Review FAFSA parent information
- Correct assumptions and school code information.
- View SAI status and database matches.

Related Topics

- Overriding the Expected Family Contribution
  The system displays the override at the parent and student contribution level. Overriding the Expected Family Contribution is the same for both Federal Methodology and Institutional Methodology.

Understanding ISIR Corrections

When a corrected ISIR loads, a new effective-dated row is inserted into the ISIR Data Corrections component. The current date is the effective date; not the CPS/FPS transaction process date.

The federal database match information on the ISIR updates in the packaging status summary, database match page. You cannot alter the database match field. Override fields on this page reflect an institutional override of the database match results.

NSLDS information loads if the NSLDS information on the ISIR is more recent than the current loaded NSLDS information, based on the NSLDS transaction number.

Two data load options allow you to:

- Suspend the ISIR if the primary SAI on the ISIR does not match the primary SAI displayed in the ISIR Data Corrections component.
- Control the Federal Methodology Need Analysis Calculator (FM NAC) process for corrected ISIRs.

This section discusses the ISIR correction load logic.

> **Note**
>
> The system loads only corrected ISIRs submitted by your school. Corrections made by another institution, those initiated by the student, or initiated by CPS/FPS do not process and must be resolved individually in the ISIR Suspense Management page.

The FAPSAR00 process performs the following steps to process corrected ISIRs:

1. For 2023-2024 and prior Aid Years, the system compares the Original SSN and Name code from the ISIR against all loaded ISIRs to determine whether the ISIR is loaded.

   For 2024-2025 and future Aid Years, the system compares the SSN from the ISIR against all loaded ISIRs to determine whether the ISIR is loaded.

   If no match is found, the ISIR suspends with a suspend reason of *Student Not Found.*

   If a previously loaded ISIR is found, the next check is performed.

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The system verifies that the ISIR was corrected by the school by checking either the ISIR ETI or the appropriate Multi-School flag fields.

If a previously loaded ISIR exists for the student, the correction ISIR is loaded and assigned a load status of *Change Processed.*

If the system determines that the corrected ISIR was not initiated by the school, two options are available: Suspend Non-School Initiated ISIRs and Process Non-School Initiated ISIRs as new Application ISIRs.

2. Optionally, you can compare the primary SAI on the ISIR with the primary SAI on the ISIR Data Corrections component.

   If they do not match, the ISIR suspends with a suspend reason of *Calc Mismatch.*

   If the SAIs match, the ISIR loads and calls a final optional feature.

   If no previously loaded ISIR exists with which to make the comparison, the load process handles the corrected ISIR as a new application ISIR.

   If you do not select the option to compare SAIs, the ISIR loads and calls a final optional feature

3. You can determine whether a new FM NAC calculation is performed after the ISIR loads.

Pages Used to Make ISIR Data Corrections

Page Name	Definition Name	Navigation	Usage
Student Information	ISIR_PIA_CS1	**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR Records**, and then **Student Information**	Correct information on the FAFSA Student information page.
Spouse Information	ISIR_PIA_CS2	**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR Records**, and then **Spouse Information**	Correct information on the FAFSA Student Spouse information page.
Parent Information	ISIR_PIA_CS3	**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR Records**, and then **Parent Information**	Correct information on the FAFSA Parent information page.
Parent Spouse/Partner	ISIR_PIA_CS4	**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR Records**, and then **Parent Spouse/ Partner**	Correct information on the FAFSA Parent Spouse/Partner information page.
Transaction Detail	ISIR_PIA_CS5	**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR Records**, and then **Transaction Detail**	Correct information on the FAFSA Transaction Detail page.

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Page Name	Definition Name	Navigation	Usage
SAI and Flags (student aid index and flags)	ISIR_PIA_CS6	**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR Records**, and then **SAI and Flags**	View information on the SAI and Flags page.
Address Use	ISIR_ADR_MNT_SEC	Click the **Student Address** link on the Student Information page.	View the student's Campus Community address used for the ISIR Correction file. Your ISIR Address Usage parameters and the Owning School Code determine the address, which you can override.
Original ISIR Address	ISIR_ORG_ADR1_SEC	Click the **ISIR Address** link on the Student Information page.	View address information for the student reported on the current ISIR.
Federal Extension	INAS_FED_EXTnn_SEC	Click the **FM** link on any tab in the Correct ISIR records component.	Override EFC local policy options.
Federal Extension EFC Override	INAS_FEDEX_sai_SEC	Click the **Override Federal EFC** link on the Federal Extension page.	Override EFC components for academic and non-standard award periods. **Note:** This page is only used for 2023-2024 and prior Aid Years.
INAS Institutional Extension 1	INAS_PROF_EXT1_Snn	Click the **IM** link on any tab in the Correct ISIR records component or any tab in the Institutional Application, Maintain Application 20nn-20nn component.	Override INAS local policy options or institutional calculations on a student-by-student basis.
Institutional Budget Durations	INAS_PRFEX_DUR_SEC	Click the **Budget Durations** link on the INAS Institutional Extension 1 page.	Override INAS local policy options for institutional academic and non-standard budget duration.
Institutional EFC Override	INAS_PROF_EFC_SEC	Click the **Override Institutional EFC** link on the INAS Institutional Extension 1 page.	Override INAS local policy options for institutional academic and non-standard budget duration.

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Using the ISIR Correction Component

This section discusses how to use the ISIR correction component.

Correcting ISIR Data

The system stores and displays each loaded ISIR in a separate effective-dated row that can't be modified. To correct an ISIR record, insert a new effective-dated row in the component.

Numeric Fields That Support a Blank, Non-Zero Value

Several numeric fields on the ISIR Data Corrections pages support a blank, non-zero value so that the FM NAS calculation can be used to determine a usable value for the field. These values also appear blank if reported blank on the ISIR rather than appear as zero. The fields include these for all four contributor roles (student, student spouse, parent, parent spouse):

- Income Earned from Work
- Tax Exempt Interest Income
- Untaxed Portions of IRA Distributions
- Pension Rollover
- AGI
- Income Tax Paid
- Earned Income Tax Credit Received During Tax Year?
- Deductible Payments to IRA, Keogh, Other
- Education Credits
- Schedule C amount
- Foreign Earned Income Exclusion

Field Descriptions for ISIR Corrections

For ISIR Field descriptions for these pages, please see the *FAFSA Specifications Guide Volume 4* on the U.S. Department of Education (ED) Federal Student Aid Knowledge Center website.

Reviewing and Correcting FAFSA Information

Access the Student Information page (**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR records**, and then **Student Information**).

On this page, you find four tabs for each of the four potential contributors to the FAFSA application:

- Student
- Student Spouse
- Parent
- Parent Spouse/Partner

The four contributor tabs display many of the same fields for each potential contributor. Student identifying information and information regarding the ISIR transaction including Correction Status, Student Aid Index (SAI), and Dependency Status are common across these four tabs.

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Other information includes some common fields but with data individual to each contributor. Some contributor tabs have more information displayed than others with the Student tab displaying many fields unique to the student.

> **Note**
>
> When you open an uncorrected ISIR, an Add (+) button is available. Click this button to insert a new row to make corrections.

Field or Control	Description
Correction Status	Set the value to *Send* when the ISIR is ready to be sent to the CPS/FPS to request a corrected ISIR. Values include: *Accepted, Don't Send, Pending, Rejected, Send,* and *Sent.*
Effective Date	The date the correction status was last modified.
SAI Status	The status displays as: *Official, Provisional Independent, Rejected. or Unofficial.*

Federal Tax Information (FTI) Consent

Each contributor tab has information about the contributor's consent to allow the Internal Revenue Service to provide to the contributor's Federal Tax Information (FTI) to ED for the purposes of processing the FAFSA.

CS Bio/Demo Data (Student Contributor only)

CS Bio/Demo Data is the information stored in the Campus Solutions (CS) Campus Community bio-demographic records and might differ from the information listed as ISIR Bio/Demo Data. To update actual information to match ISIR information, use the Campus Community bio-demographic data components.

Use the checkboxes to send the appropriate fields to CPS/FPS for correction. When a corrected ISIR is requested, the system sends the selected fields to the CPS/FPS.

Field or Control	Description
Correct Telephone	The field displays the active telephone number based on the phone usage setting on the Process Demo Setup page. If selected, the system displays the **Ovrd** check box. Select the **Ovrd** check box to override the telephone number to be sent to the CPS/FPS. From the list of options, select the student's active phone type to be sent to the CPS/FPS. The system then displays the alternate telephone number.
Correct Email	The field displays the active email address based on the Email usage setting on the Process Demo Setup page. If selected, the system displays the **Ovrd** check box. Select the **Ovrd** check box to override the email address to be sent to the CPS/FPS. From the list of options, select the student's active email type to be sent to the CPS/FPS. The system then displays the alternate email address.

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Field or Control	Description
Student Address	Click this link to view the student's active address in CS Campus Community.

ISIR Bio/Demo Data (All Contributors)

Use this section to view and correct bio-demographic information reported on the ISIR record:

- For the Student, this is labeled **ISIR Bio/Demo Data**.
- For the Student Spouse, this is labeled **Student Spouse Bio/Demo**.
- For the Parent, this is labeled **Parent Bio/Demo**.
- For the Parent Spouse/Partner, this is labeled **Parent Sps/Ptr Bio/Demo**.

For the Student, click the **ISIR Address** to view the original ISIR address.

For the Student Spouse, Parent, or Parent Spouse, click the **Spouse Address**, **Parent Address**, or **Parent Spouse/Partner Address**, respectively, to view the original ISIR address.

Student Demographic Info (Student Contributor Only)

Use this section to view and correct additional student demographic information.

Non–Financial Information (Student and Parent Contributors Only)

Use this section to view and correct student's or parent's answers to marital status, grade level, bachelor's degree, teacher certification, questions used to determine dependency status, and number of people in the family and in college.

Student Circumstances (Student Contributor Only)

Use this section to view and correct the student's self reported circumstances.

Fed Benefits Received (Student and Parent Contributors Only)

Use this section to view and correct the student or parent's received Federal benefits.

Tax Form Filed (All Contributors)

Use this section to view and correct information about a contributor's Federal income tax form.

Financial Information (All Contributors)

Use this section to view a contributor's FTI and view and correct other financial information (Non-FTI).

Viewing and Correcting Transaction Details

Access the Assumptions\School Codes page (**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR records**, and then **Transaction Detail**).

Transaction Indicators

Field or Control	Description
Dependency Override Indicator	Select a value to override the student's Federal dependency status.

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Field or Control	Description
Professional Judgment	Select a value to identify a transaction that was created with an adjusted SAI based on a professional judgment.
CFH Indicator (children of fallen heroes indicator)	Select a value to indicate a student's eligibility for a Children of Fall Heroes (CFH) Scholarship. Once the applicant is identified as eligible for the CFH Scholarship, this flag remains set to **Eligible for CFH** and carries forward on subsequent transactions and subsequent years. This indicator can be set or removed in the FAFSA Partner Portal.
IASG Indicator (Iraq Afghanistan service grant indicator)	Select a value to indicate a student's eligibility for an Iraq Afghanistan Service Grant (IASG).The Iraq Afghanistan Service Grant Indicator identifies if an applicant meets the eligibility criteria for this grant program. This indicator can be set or removed in the FAFSA Partner Portal.

Viewing SAI and Flags

Access the EFC\DB Matches\Corr page (**Financial Aid**, and then **Federal Application Data**, and then **Correct ISIR records**, and then **SAI and Flags**).

FPS Information

These fields display intermediate values derived from federal methodology used to calculate the expected family contribution:

- Parent Total Income
- Student Total Income FISAP
- Total Income
- Parent Contribution
- Student Contribution Income
- Student Contribution Assets
- Parent Available Income
- Student Available Income
- Parent Income Protection Allowance
- Student Income Protection Allowance
- Parent Employment Expense Allowance
- Student Employment Expense Allowance
- Parent Net Worth
- Student Net Worth
- Assumed Parent Family Size
- Assumed Student Family Size

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Match Flags

The database match flags on the ISIR show codes that are the result of CPS/FPS matching information entered on the FAFSA application with federal databases. The flags on a student's ISIR can impact their eligibility for federal student aid. The annual SAR Comment Codes and Text guides, available on ED's Federal Student Aid Knowledge Center, including guidance on the meaning of these flags and resolution steps.

Corrected/Verified Fields

The system displays the **Correction Source** for the data, the **ISIR Field Nbr** (ISIR field number), and the associated **Code.** The Code indicates whether the field was corrected on this ISIR transaction or a previous ISIR transaction.

Making ISIR Corrections for 2022-2023 and 2023-2024

Use the ISIR Data Corrections component to review and correct FAFSA application information loaded from the ISIR. All ISIR field modifications are maintained in the ISIR correction audits component.

> **Note**
>
> This topic discusses ISIR corrections for the 2023-2024 and prior Aid Years.

This section provides an overview for processing ISIR corrections and discusses how to:

- Use the ISIR correction component.
- Review FAFSA student information.
- Review FAFSA parent information
- Correct assumptions and school code information.
- View EFC status and database matches.

Related Topics

- Overriding the Expected Family Contribution
  The system displays the override at the parent and student contribution level. Overriding the Expected Family Contribution is the same for both Federal Methodology and Institutional Methodology.

Understanding ISIR Corrections

When a corrected ISIR loads, a new effective-dated row is inserted into the ISIR Data Corrections component. The current date is the effective date, not the CPS/FPS transaction process date.

The federal database match information on the ISIR updates in the packaging status summary, database match page. You cannot alter the database match field. Override fields on this page reflect an institutional override of the database match results.

NSLDS information loads if the NSLDS information on the ISIR is more recent than the current loaded NSLDS information, based on the NSLDS transaction number.

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Two data load options allow you to:

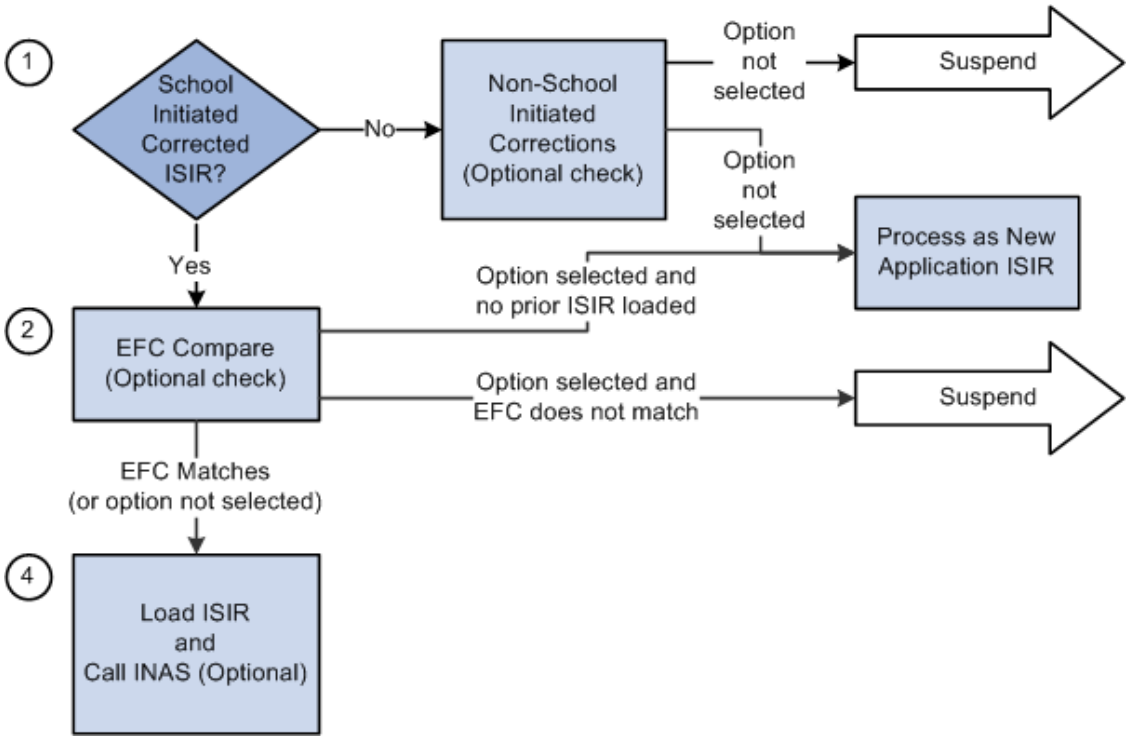
- Suspend the ISIR if the primary EFC on the ISIR does not match the primary EFC displayed in the ISIR Data Corrections component.
- Control the Federal Methodology Need Analysis Calculator (FM NAC) process for corrected ISIRs.

This section discusses the ISIR correction load logic.

> **Note**
>
> The system loads only corrected ISIRs submitted by your school. Corrections made by another institution, those initiated by the student, or initiated by CPS/FPS do not process and must be resolved individually in the ISIR Suspense Management page.

The following diagram reviews the ISIR correction load logic.

ISIR Load Logic



The FAPSAR00 process performs the following steps to process corrected ISIRs:

1. The system compares the Original SSN and Name code from the ISIR against all loaded ISIRs to determine whether the ISIR is loaded.

   If no match is found, the ISIR suspends with a suspend reason of *Student Not Found.*

   If a previously loaded ISIR is found, the next check is performed.

   The system verifies that the ISIR was corrected by the school by checking either the ISIR ETI or the appropriate Multi-School flag fields.

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If a previously loaded ISIR exists for the student, the correction ISIR is loaded and assigned a load status of *Change Processed.*

If the system determines that the corrected ISIR was not initiated by the school, two options are available: Suspend Non-School Initiated ISIRs and Process Non-School Initiated ISIRs as new Application ISIRs.

2. Optionally, you can compare the primary EFC on the ISIR with the primary EFC on the ISIR Data Corrections component.

   If they do not match, the ISIR suspends with a suspend reason of *Calc Mismatch.*

   If the EFCs match, the ISIR loads and calls a final optional feature.

   If no previously loaded ISIR exists with which to make the comparison, the load process handles the corrected ISIR as a new application ISIR.

   If you do not select the option to compare EFCs, the ISIR loads and calls a final optional feature

3. You can determine whether a new FM NAC calculation is performed after the ISIR loads.

Pages Used to Make ISIR Data Corrections

> **Note**
>
> The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Page Name	Definition Name	Navigation	Usage
FAFSA Student Information	ISIR_PIA_CS1_nn	**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Student Information**	Correct information on the FAFSA Student Information page.
FAFSA Parent Information	ISIR_PIA_CS4_nn	**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Parent Information**	Correct information on the FAFSA Parent Information page.
Address Use	ISIR_ADR_MNT_SEC	Click the **Student Address** link on the Student Information page.	View the student's Campus Community address used for the ISIR Correction file. Your ISIR Address Usage parameters and the Owning School Code determine the address, which you can override.

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Page Name	Definition Name	Navigation	Usage
Original ISIR Address	ISIR_ORG_ADR_SEC	Click the **ISIR Address** link on the Student Information page.	View address information for the student reported on the current ISIR.
Federal Extension	INAS_FED_EXTnn_SEC	Click the **FM** link on any tab in the Correct 20nn-20nn ISIR records component.	Override EFC local policy options.
Federal Extension Budget Durations	INAS_FEDEX_DUR_SEC	Click the **Budget Durations** link on the Federal Extension page.	Override EFC local policy options for federal academic and non-standard budget duration.
Federal Extension EFC Proration Options	INAS_FEDEX_PRO_SEC	Click the **EFC Proration Options** link on the Federal Extension page.	Override EFC proration options for method and non-standard months.
Federal Extension EFC Override	INAS_FEDEX_EFC_SEC	Click the **Override Federal EFC** link on the Federal Extension page.	Override EFC components for academic and non-standard award periods.
INAS Institutional Extension 1	INAS_PROF_EXT1_S04	Click the **IM** link on any tab in the Correct 20nn-20nn ISIR records component or any tab in the Institutional Application, Maintain Application 20nn-20nn component.	Override INAS local policy options or institutional calculations on a student-by-student basis.
Institutional Budget Durations	INAS_PRFEX_DUR_SEC	Click the **Budget Durations** link or the **Override Institutional EFC** link on the INAS Institutional Extension 1 page.	Override INAS local policy options for institutional academic and non-standard budget duration.
Institutional EFC Override	INAS_PROF_EFC_SEC	Click the **Override Institutional EFC** link on the INAS Institutional Extension 1 page.	Override INAS local policy options for institutional academic and non-standard budget duration.
Change Student Income Values	ISIR_ASM_ST1_SECnn	Click the **Assumptions** link within the Student Data - Financial Information group box on the Student Information page.	Edit any fields that are unavailable for entry on the main page due to the CPS/FPS assigning an assumed value to the field.

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Page Name	Definition Name	Navigation	Usage
Change Student Status Values	ISIR_ASM_ST2_SECnn	Click the **Assumptions** link within the Student Data - Dependency Status Information group box on the Student Information page to open the Change Student Status Values page.	Edit any fields that are unavailable on the main page because the CPS/FPS assigned an assumed value to the field.
Change Parent Household Information	ISIR_ASM_PR2_SECnn	Click the **Assumptions** link within the Parent Data - Parent Background Information group box on the Parent Information page.	Change the Assumption Indicator for fields pertaining to parent household information to correct the fields on the Parent Data - Parent Background Information page.
Change Parent Earnings and Income Values	ISIR_ASM_PR1_SECnn	Click the **Assumptions** link within the Parent Data - Parent Financial Information group box on the Parent Information page.	Change the Assumption Indicator for each of the fields pertaining to parent financial information so that the field can be corrected on the Parent Data – Parent Background Information page.
Assumptions and School Codes	ISIR_PIA_CS2_nn	**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Assumptions/School Codes**, and then **Assumptions and School Codes**	Enter corrections to a student's choice of school and housing, to override a student's dependency status, and to override FAFSA Assumption and/or Reject information on behalf of the student. You can use this page to override this data. **Note:** Corrections to Housing choice are restricted to the 2023-2024 and prior Aid Years.
EFC\DB Matches\Corr	ISIR_PIA_CS3_nn	**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **EFC\DB Matches\Corr**	View the EFC details for a student and information about all ISIR database matches and processing flags set by the CPS/FPS.
Need Summary Monthly EFC	NEED_SMRY_EFC_SEC	Click the **Monthly EFC** link within the EFC Information group box on the EFC/DB Matches page.	View information about the primary and secondary expected family contributions.

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Using the ISIR Correction Component

This section discusses how to use the ISIR correction component.

Correcting ISIR Data

The system stores and displays each loaded ISIR in a separate effective-dated row that cannot be modified. To correct an ISIR record, insert a new effective-dated row in the component by clicking the Add (+) button located at the top of the page. The Add button is available for uncorrected ISIR records.

When the CPS/FPS has used an assumed value, the field is unavailable and is marked with an 'a' at the right of the field value. Use the corresponding assumptions page to make the field correctable.

Numeric Fields That Support a Blank, Non-Zero Value

Several numeric fields on the ISIR Data Corrections pages support a blank, non-zero value so that the FM NAS calculation can be used to determine a usable value for the field. These values also appear blank if reported blank on the ISIR rather than appear as zero. The fields include:

- AGI (student and parent)
- U.S. Taxes Paid (student and parent)
- Cash and savings (student and parent)
- Investment Net Worth (student and parent)
- Student's Income, Spouse's Income, Father's Income, and Mother's Income.
- Business/Farm Net Worth (student and parent)
- All Untaxed Income fields (student and parent)
- All Additional Financial Total fields (student & parent)

Field Descriptions for ISIR Corrections

For ISIR Field descriptions for these pages, please see the *Electronic Data Exchange Technical References* on the U.S. Department of Education Information for Financial Aid Professionals (IFAP) website.

Reviewing FAFSA Student Information

Access the Student Information page (**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Student Information**).

> **Note**
>
> When you open an uncorrected ISIR, an Add (+) button is available. Click this button to insert a new row to make corrections.

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Field or Control	Description
Correction Status	Set the value to *Send* when the ISIR is ready to be sent to the CPS/FPS to request a corrected ISIR. Values include: *Accepted, Don't Send, Pending, Rejected, Send,* and *Sent.*
Status Date	The date the correction status was last modified.
EFC Status	The status displays as: *Unofficial, Official,* or *Rejected.*

Actual Bio/Demo Data

Actual Bio/Demo Data is the student's information stored in the Campus Community bio-demographic records and might differ from the information listed as ISIR Bio/Demo Data. To update actual information to match ISIR information, use the Campus Community bio-demographic data components.

Select the check box to send the corresponding fields to CPS/FPS for correction. When a corrected ISIR is requested, the system sends the selected fields to the CPS/FPS.

Field or Control	Description
Correct Telephone	The field displays the active telephone number based on the phone usage setting on the Process Demo Setup page. If selected, the system displays the **Ovrd** check box. Select the **Ovrd** check box to override the telephone number to be sent to the CPS/FPS. From the list of options, select the student's active phone type to be sent to the CPS/FPS. The system then displays the alternate telephone number.
Correct Email	The field displays the active email address based on the Email usage setting on the Process Demo Setup page. If selected, the system displays the **Ovrd** check box. Select the **Ovrd** check box to override the email address to be sent to the CPS/FPS. From the list of options, select the student's active email type to be sent to the CPS/FPS. The system then displays the alternate email address.
Student Address	Click this link to view the student's active address.

ISIR Bio/Demo Data

The **ISIR Bio/Demo Data** column displays bio-demographic information reported on the ISIR record. Click the **ISIR Address** to view the original ISIR address.

Student Data – Financial Information

Click the **Assumptions** link to access the **Change Student Income Values** page.

Use this page to override field values where the CPS/FPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the component without first overriding the **Assumption Indicator** where the CPS/FPS has used an alternate value.

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Set the **Assumption Indicator** to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Student Data – Dependency Status Information

Field or Control	Description
Marital Status	You can change marital status in personal data or use this page to change the ISIR record. Information changed here does not change personal data information. This enables you to change the marital status to affect the EFC but does not change the marital status value in personal data.
Marital Status (Personal Data)	The system displays the marital status listed in the Campus Community bio-demographic data records.

Click the **Assumptions** link to access the **Change Student Status Values** page.

Use this page to override field values where the CPS/FPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the component without first overriding the assumption indicator where the CPS/FPS has used an alternate value. Set the assumption indicator to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Reviewing FAFSA Parent Information

Access the Parent Information page (**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Parent Information**).

> **Note**
>
> When you open an uncorrected ISIR, an Add (+) button is available. Click this button to insert a new row to make corrections.

Field or Control	Description
Correction Status	Set the value to *Send* when the ISIR is ready to be sent to the CPS/FPS to request a corrected ISIR. Values include: *Accepted, Don't Send, Pending, Rejected, Send,* and *Sent.*
Status Date	The date the correction status was last modified.
EFC Status	The status displays as: *Unofficial, Official,* or *Rejected.*

Parent Data – Background Information

Click the **Assumptions** link to access the **Change Parent Household Information** page.

Use the **Change Parent Household Information** page to override field values where the CPS/FPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the

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component without first overriding the assumption indicator where the CPS/FPS has used an alternate value. Set the assumption indicator to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Parent Data – Financial Information

Click the **Assumptions** link to access the **Change Parent Earnings and Income Values** page.

Use this page to override field values where the CPS/FPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the component without first overriding the assumption indicator where the CPS/FPS has used an alternate value. Set the assumption indicator to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Correcting Assumptions and School Code Information

Access the Assumptions\School Codes page (**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Assumptions\School Codes**).

Miscellaneous Information

Field or Control	Description
Dependency Override Indicator	For professional judgment override of the students federal dependency status.

Assumptions and Reject Overrides

If a student omits an answer to a question or the answer is inconsistent, CPS/FPS either assumes a response for the applicant or rejects the response. You can use this page to override this data. Select the check box to perform the override. Clearing the check box indicates no change and the override is not performed.

Student IRS DRT Flags and Parent IRS DRT Flags

The flags with the same label under both Student and Parent sections use the same values with the exception of the IRS Display flags. These fields represent how students and parents used the IRS Data Retrieval Tool (DRT) to transfer data to the FAFSA and if any data was changed after being transferred.

Viewing EFC Status and Database Matches

Access the EFC\DB Matches\Corr page (**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **EFC\DB Matches\Corr**).

EFC Information

The EFC page is designed to resemble the EFC information as it appears on the student aid report (SAR).

The following fields display intermediate values derived from federal methodology used to calculate the expected family contribution: **TI** (total income), **STI** (student total income), **FTI** (FISAP total income), **TSC** (total student contribution), **STX** (state tax), **IPA** (income protection allowance), **TPC** (total parent contribution), **SCA** (student's contribution from assets), **AI**

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(available income), **ATI** (allowances against total income), **EA** (employment allowance), **DNW** (discretionary net worth), **PCA** (parents' contribution from assets), **CAI** (calculated available income), **AAI** (adjusted available income), **SIC** (student income contribution), and **PC** (parent contribution).

Database Matches\Flags

The database match flags on the ISIR show codes that are the result of CPS/FPS matching information entered on the FAFSA application with federal databases. The flags on a student's ISIR can impact their eligibility for federal student aid. The annual SAR Comment Codes and Text guides, available on the US Department of Education's Institutional Financial Aid Professional (IFAP) website, include guidance on the meaning of these flags and resolution steps.

Corrected/Verified Fields

The system displays the **Correction Source** for the data, the **ISIR Field Nbr** (ISIR field number), and the associated **Code.** The Code indicates whether the field was corrected on this ISIR transaction or a previous ISIR transaction.

Viewing Need Summary Monthly EFC

Access the Need Summary Monthly EFC page (click the **Monthly EFC** link within the EFC Information group box on the EFC/DB Matches page).

On the previous pages, the system displays the 9 month EFC on the EFC\DB Matches\Corr page. The 9 month EFC does not display on the Need Summary Monthly EFC page.

To prorate EFC, the system differentiates between the non-standard term as the header—summer, fall, spring—and the non-standard term as a trailer—fall, spring, summer. This affects how the EFC is apportioned:

- If the non-standard term is the header, then the non-standard EFC uses the months at the beginning of the monthly EFC.
- If the non-standard term is the trailer, it uses the months at the end of the monthly EFC.

The system determines the non-standard term as header or trailer by evaluating FA Term. If a term has been set up on Valid Terms for Career as non-standard with term start and end dates and it appears on FA Term, a comparison occurs. If the non-standard term has a start date before the earliest start date of an academic term, the non-standard term is determined to be the header. Conversely, if the non-standard term has a start date after the earliest start date of an academic term, the non-standard term is determined to be the trailer.

For more information, see *The ISIR Guide* on the U.S. Department of Education website https://fsapartners.ed.gov/.

Processing Outbound Files

You can create, view, and send outbound files to the U.S. Department of Education (ED) for ISIR Corrections and other data.

This section discusses how to:

- Move records to outbound staging tables.
- Create outbound files for CPS/FPS.
- View outbound staging table files.
- View outbound staging table data.

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To send files out, you:

1. Run a process that moves all the outbound files to the outbound staging tables.
2. Run the process to create a flat file from the data in the staging tables.
3. Send the flat file to the CPS/FPS using outbound file processes to send ISIR corrections, add institution requests, and FAFSA signature files.

Pages Used to Process Outbound Files

Page Name	Definition Name	Navigation	Usage
ISIR Corrections Export	RUN_CNTL_FAPCOR00	**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Process ISIR Corrections**, and then **ISIR Corrections Export**	Run the Corrections Build process to create outbound files and place them in the ISIR staging tables. This process gathers Add Institution Requests, FAFSA signature, and ISIR Corrections records.
Batch Statistics	RUNCTL_FAPCOR00SEC	Click the **Run Information** button on the ISIR Corrections Export page.	Display information such as the correction file batch number, signature file batch number, and number of records exported for each batch the last time the export process was run.
FA Outbound	RUNCTL_FA_OUT	**Financial Aid**, and then **File Management**, and then **Create Federal Data Files**, and then **FA Outbound**	Create an external financial aid electronic commerce file.
ISIR Outbound Summary	ISIR_nn_OUTBOUND	**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **View 20nn-20nn Outbound Files**, and then **ISIR Outbound Summary**	View the batch files that are in the ISIR staging tables. You can verify that the FAPCOR00 process was successful if the batch is listed in this page.
ISIR Outbound Data	ISIR_CORR_HD_TEST	**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **View 20nn-20nn Outbound Data**, and then **ISIR Outbound Data**	View data for files that have been created or sent to the outbound staging table.
Correction Fields/ Overrides	ISIR_CORR_A_SEC	Click the **Correction Data** link on the Outbound Staging Tables detail page, ISIR Corr A tab.	View detail information about ISIR Corrections A page.

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Moving Records to Outbound Staging Tables

Access the ISIR Corrections Export page (**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Process ISIR Corrections**, and then **ISIR Corrections Export**).

Field or Control	Description
Active	Select to have the export process use the criteria chosen to send ISIR corrections to the CPS/FPS. If the check box is cleared, the export process ignores the criteria specified in that row. More than one row can be active at one time, which enables you to export ISIR corrections from more than one aid year.
TG Number	Enter the SAIG identifier for the academic institution.
Process Corrections	Select to export ISIR corrections that match the chosen institution, aid year, and school code.
Process Add Institution	Select this check box to export add institution requests that match the chosen institution, aid year, and school code.
Process ISIR Signatures	Select to export signature page information collected by your school that match the chosen institution, aid year, and school code.
Run Information	Click this link to access batch statistics, including the total number of records output for a given batch run.
Process Instance	Number assigned by the process scheduler representing the last time the ISIR correction export process ran without error.
Run Date and Time	Date and time of the process instance.
Refresh	Click the button to update the **Process Instance** and **Run Date and Time** fields.
Batch Message Print	Click this link to create a text file containing the messages generated during the load process. The message file that is created for printing is called FAMSGPRT.LIS. Its location is based on the TEMP setting in the configuration manager.
Run	Click this button to run the FAPCOR00 process from the process scheduler. When this process has completed successfully, the outbound files in the database move to the ISIR staging tables.

Creating Outbound Files for CPS/FPS

Access the FA Outbound page (**Financial Aid**, and then **File Management**, and then **Create Federal Data Files**, and then **FA Outbound**).

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Field or Control	Description
Outbound File Path	Enter the location of the generated files. Make sure the application server has access to the file location.
Outbound File Type	Select the file type of the files to be generated. The supported file types are listed with associated message class or output file name: ISIR Corrections, CORR0XIN.XXX FAFSA Signatures, SIGS0XIN.XXX Pell Data Request, PGRQxxIN

The FA Outbound process selects records in the outbound staging tables and names the files in the appropriate message class. If multiple files of the same message class are generated, the file name extension is incremented to ensure uniqueness, such as CORR05IN.001. so that files are not overwritten.

> **Note**
>
> Starting with aid year 2024-2025 and onward, FAFSA Signature files will no longer be accepted by FPS. The last year CS will generate these files is aid year 2023-2024.

Viewing Outbound Staging Table Files

Access the ISIR Outbound Summary page (**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **View 20nn-20nn ISIR Outbound Files**, and then **ISIR Outbound Summary**).

Click the **Detail** link to display all of the outbound staging table fields.

Viewing Outbound Staging Table Data

Access the ISIR Outbound Data page (**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **View 20nn-20nn ISIR Outbound Data nn/nn**).

Use these pages to view data being sent for ISIR Correction & ISIR Signature files.

Processing Rejected ISIR Correction Files

Use the FASAREXX process to load ISIR Correction files that were rejected by the CPS/FPS. This section discusses how to:

- Load error files.
- Make corrections to rejected ISIR corrections.

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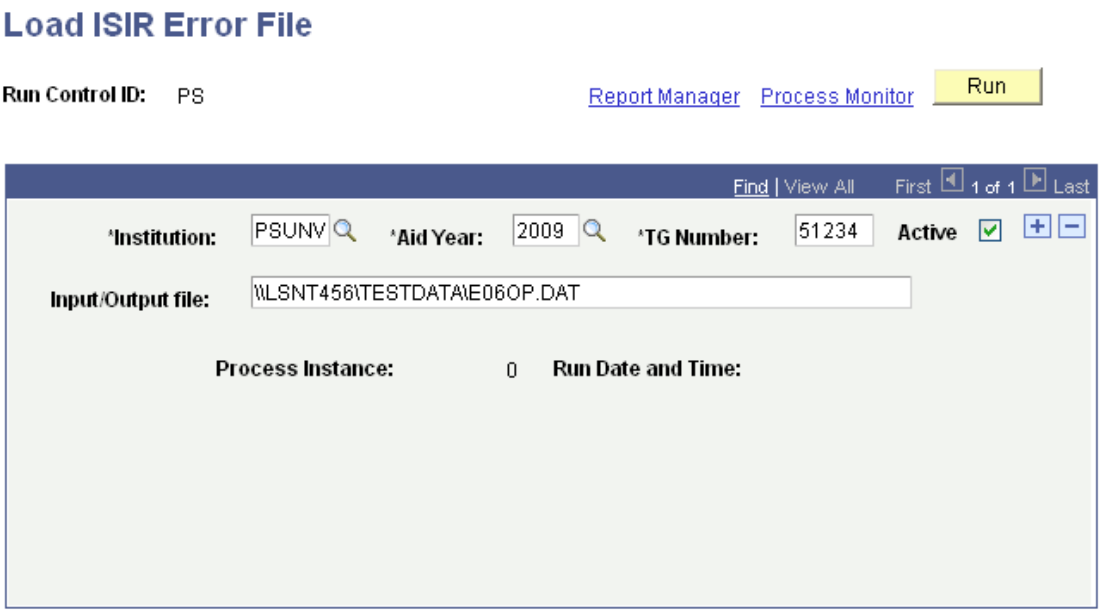
Pages Used to Process Rejected ISIR Correction Files

Page Name	Definition Name	Navigation	Usage
Load ISIR Error File	RUNCTL_FASAREXX	**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Process ISIR Correction Errors**, and then **Load ISIR Error File**	Evaluate record-level error files received from the CPS/FPS (CORE0XOP message class). If the file contains history (ISIR) correction errors, the process creates a matching Correction Management record for each rejected ISIR.
ISIR Correction Management	ISIR_CORRECT	**Financial Aid**, and then **Federal Application Data**, and then **Manage Corrected ISIR Data**, and then **ISIR Correction Management**	Make corrections to rejected ISIR Correction files.

Loading Error Files

Access the Load ISIR Error File page (**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Process ISIR Correction Errors**, and then **Load ISIR Error File**).

This example illustrates the fields and controls on the Load ISIR Error File page. You can find definitions for the fields and controls later on this page.



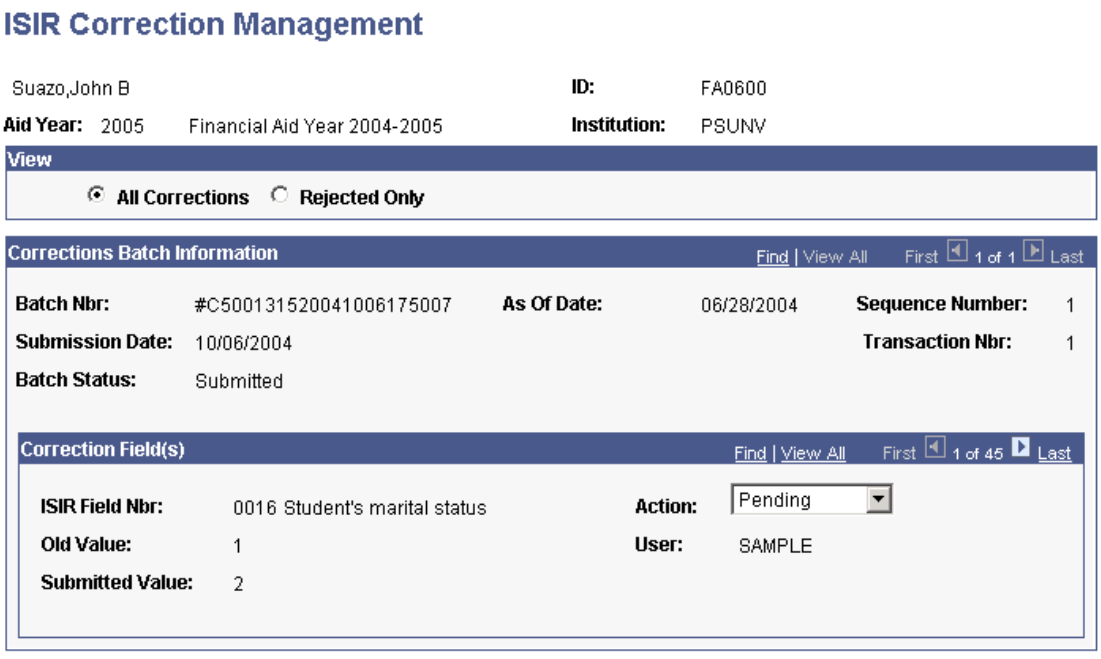
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Field or Control	Description
TG Number	Enter the Title IV WAN identifier for the academic institution.
Input/Output file	Enter the location of the Record Level Error Report file to process.
Active	Select to have the load process use the criteria chosen to load data from the CPS/FPS. If not selected, the load process ignores the criteria specified in that row. More than one row can be active at one time, which enables you to load data from more than one aid year.
Process Instance	Number assigned by the process scheduler representing the last time the ISIR Load process ran without error. Click the **Refresh** button to update.
Run Date and Time	Date and time of the process instance. Click the **Refresh** button to update.

Making Corrections to Rejected ISIR Corrections

Access the ISIR Corrections Management page (**Financial Aid**, and then **Federal Application Data**, and then **Manage Corrected ISIR Data**, and then **ISIR Correction Management**).

This example illustrates the fields and controls on the ISIR Corrections Management page. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> You can view all ISIR corrections initiated by the system in the ISIR Corrections Management component after the corrections export process is run.

To make corrections to rejected ISIR Correction files, do the following:

1. Review the ISIR correction file on the ISIR Correction Management page.
   a. In the **Action** field, select *Resubmit* for any field you want to resubmit or select*Delete/ Ignore* to not resubmit a field.
   b. Save the changes before exiting the page.
2. Make any additional changes to ISIR fields from the ISIR Data Corrections component.
   a. If required, call the Federal Methodology Need Analysis Calculator (FM NAC) to recalculate the EFC/SAI.
   b. Set the correction status to *Send Correction(s).*
   c. Save the changes before exiting the component.
3. Run the ISIR correction export process. A new ISIR correction record is created for the student. This correction record includes fields from the rejected ISIR corrections that have been marked as Resubmit, plus any new changes made in the ISIR data corrections pages. A new set of data representing the new ISIR correction record is created in the ISIR correction management page. The rejected ISIR correction file updates to indicate a new batch status of *Reprocessed.*

View

Field or Control	Description
All Corrections	Select to view all ISIR corrections
Rejected Only	Select to view rejected corrections.

Corrections Batch Information

Field or Control	Description
Batch Nbr (batch number)	The batch number is used to match corrected ISIR records to the appropriate corrections. This is generated when the FAPCOR00 process runs.
Submission Date	Indicates the date the request was submitted.
Batch Status	Values include: *Reprocessed:* the ISIR correction file is sent back to the CPS/FPS with the corrections made in the erred fields. *Resubmit:* only correction fields with an action of resubmit are sent. *Rejected:* indicates the ISIR correction file was rejected by the CPS/FPS and needs to be corrected.
Sequence Number	The system displays how many inserted rows of data exist for the first transaction.

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Field or Control	Description
Transaction Nbr (transaction number)	The system displays the number of records that exist for a student from the CPS/FPS.

Correction Field(s)

Field or Control	Description
ISIR Field Nbr (ISIR field number)	Displays the SAR field name and field description.
Old Value	Displays the original data.
Submitted Value	Displays the correction.
Action	Select *Delete/Ignore* as the action if you do not want the correction field to be included when the new ISIR corrections file is created.
User	Displays the user name.

Working with ISIRs

This section discusses how to:

- Add your institution to a student's ISIR.
- Send FAFSA signature receipt information.
- Use the batch message print page.

Pages Used to Work with ISIRs

Page Name	Definition Name	Navigation	Usage
ISIR Add School	ISIR_ADD_SCHOOL	**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Modify ISIR School Recipients**, and then **ISIR Add School**	Add your institution to a student's ISIR. Submit this request to the CPS/FPS to request a student's ISIR data to send to your institution's destination point.
FAFSA Signature	ISIR_SIGNATURE	**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Enter FAFSA Signatures**, and then **FAFSA Signature**	Enter signature page information collected from students in preparation for transmission to the CPS/FPS.
Batch Message Print	BTCH_MSG_INQ_RUN	**Financial Aid**, and then **Print Batch Process Messages**, and then **Batch Message Print**	View information gathered by the Batch Message page.

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Adding Your Institution to a Student's ISIR

Access the ISIR Add School page (**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Modify ISIR School Recipients**, and then **ISIR Add School**).

Field or Control	Description
DRN (date release number)	Enter the student's date release number.
Trans Nbr (transaction number)	Enter the transaction number for the student aid report (SAR).
Sch Pos (school position)	Enter the school position number, from 1-10. The FAFSA allows a student to request information to be sent to up to six institutions. You can place your request in the automatic ISIR Request process.
Original SSN	Enter the student's original Social Security Number.
Name CD (name code)	Enter the first two letters from the student's last name.
Request ISIR from CPS/FPS	Select this option to include this request in the automatic ISIR request process.

Sending FAFSA Signature Receipt Information

Access the FAFSA Signature page (**Financial Aid**, and then **File Management**, and then **ISIR Corrections**, and then **Enter FAFSA Signatures**, and then **FAFSA Signature**).

> **Note**
>
> This feature is only applicable to the 2023-2024 and prior Aid Years.

Field or Control	Description
User ID	Displays the user who entered the signature page information.
Original SSN (original Social Security Number)	The original Social Security Number entered on the FAFSA by the student.
Name Code	The first two letters of the student's last name reported on the FAFSA used in conjunction with the original SSN by the CPS/FPS to uniquely identify the student.
Signed By	Select the person who signed the FAFSA signature page. Values are: *Applicant Only:* Only the student signed. *Applicant and Parent:* Both the student and the student's parent signed. *Parent Only:* Only the student's parent signed.

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Field or Control	Description
Submit Signature to CPS	Select when the record is ready to be transmitted. When the correction export program processes the record, the check box is cleared and the **Process Date** field becomes set. You can resubmit the FAFSA Signature records by selecting the check box.
Request Date	Displays the date the user enters signature page information into the system.
Process Date	Displays the date when the information is sent to the CPS.

Using the Batch Message Print Page

Access the Batch Message Print page (**Financial Aid**, and then **Print Batch Process Messages**, and then **Batch Message Print**).

Select a **Process Name.** The ISIR suspense load (FAPSAR00) process and ISIR corrections build (FAPCOR00) process generate messages.

Deleting ISIR and NSLDS Information

You can use the ISIR/NSLDS Records component to do the following:

- Delete a previously loaded ISIR to load a new ISIR for the student.

  When a new official ISIR suspends because of a conflict with a previously loaded and rejected ISIR, delete the first ISIR. After you delete the rejected ISIR, the system allows the new official ISIR to load.

- Delete an ISIR that loaded to the wrong student.

  An ISIR can load to the wrong student due to the sensitivity of the search match criteria or an ISIR can be manually assigned to the incorrect student online. If the student has already been awarded financial aid, verify that the calculated EFC/SAI and database match information is still accurate after the incorrect ISIR/NSLDS information is removed.

However, this component does not support deleting NSLDS records that were loaded from the NSLDS FAT load process. Deleting such data creates orphan data in the database and does not reset any calculated need information The summary need information on the Packaging Status Summary and Awards page is stored in PS_STDNT_AWD_PER and is updated when an ISIR loads.

The component also does not correct ISIR database match and verification selection information loaded into the PS_STDNT_AID_ATRBT record from the ISIR, which you can view in the Packaging Status Summary component. You must either load a new ISIR to synchronize the data or manually reset/override the information on the Packaging Status Summary component using the ISIR Data Corrections Database Match page as your source data.

If you delete one, but not all related ISIR data correction rows, the correct ISIR audit information is not preserved. For example, if three rows of effective-dated ISIR data exist for the same transaction number, and you delete only one row, you lose all of the ISIR audit information.

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> **Warning**
>
> Please restrict access to this component to staff members with the knowledge and authority to delete student ISIR information from the database. Incorrectly deleted or modified information can create data integrity errors in your database, or adversely affect downstream processes.

This section discusses how to:

- Delete ISIR records.
- Delete NSLDS records.

Pages Used to Delete ISIR and NSLDS Information

Page Name	Definition Name	Navigation	Usage
ISIR Delete	ISIR_DELETE	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **Delete ISIR/ NSLDS Records**, and then **ISIR Delete**	Delete incorrectly loaded ISIR records from the application tables so that correct ISIR information can be loaded for the student.
NSLDS Delete	NSLDS_DELETE	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **Delete ISIR/ NSLDS Records**, and then **NSLDS Delete**	Delete NSLDS records that were loaded from an ISIR record and to modify the effective date of previously loaded ISIR NSLDS historical data.

Deleting ISIR Records

Access the ISIR Delete page (**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **Delete ISIR/NSLDS Records**, and then **ISIR Delete**).

Each row in the grid represents an effective-dated row in the ISIR Data Corrections component. All related ISIR rows have the same transaction number.

Field or Control	Description
Delete ISIR	Select to mark a row to delete.
Eff Date (effective date)	The effective date for the data row on the ISIR Data Corrections component.
Sequence	This is a database table key value.
Trans Nbr (transaction number)	The ISIR transaction number.
NSLDS Txn (NSLDS transaction number)	This transaction number is used like the ISIR transaction number. When it is used in increments, it indicates that the NSLDS information on the ISIR has been revised.
App Date (application date)	Date the CPS/FPS received the FAFSA application.

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Field or Control	Description
ISIR Input Record Type	ISIR transaction data source.
Delete Selected ISIRs	Click this button to delete the rows from the grid that you selected. If you save the page changes, the data is permanently deleted from the database and cannot be viewed in the ISIR Data Corrections component.

After you delete ISIR data, you must do the following:

1. Use the ISIR Data Corrections component to verify that the data is deleted.
2. Review and recalculate need summary information that displays in the packaging status summary and awarding pages. If data still exists in the ISIR Data Corrections component, recalculate the need. If you are loading new ISIR data, make sure that a Federal Methodology Need Analysis Calculator (FM NAS) calculation performs after the ISIR loads.
3. Review and correct ISIR database match and verification selection information. Loading a new ISIR synchronizes the data. If you do not load a new ISIR, manually reset/override the information on the Packaging Status Summary component using the current ISIR Data Corrections component, Database Match page, as the source data.
4. Verify that the appropriate ISIR audit information is deleted.

Database tables affected by the ISIR delete include:

- PS_ISIR_COMPUTED
- PS_ISIR_CONTROL
- PS_ISIR_INTERPRET
- PS_ISIR_PARENT
- PS_ISIR_STUDENT
- PS_ISIR_COMMENTS
- PS_ISIR_FLD_REVIEW
- PS_ISIR_FLD_CORR
- PS_ISIR_REJ_REASON
- PS_AUDIT_ISIR_CHNG where ISIR_TXN_NBR equals deleted ISIR
- SFA_ISIR_STU
- SFA_ISIR_PAR
- SFA_ISIR_CONT

Deleting NSLDS Records

Access the NSLDS Delete page (**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **Delete ISIR/NSLDS Records**, and then **NSLDS Delete**).

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> **Warning**
>
> The NSLDS Delete page is not designed to delete all NSLDS FAT information. If you delete information loaded from the NSLDS FAT load process, the system creates orphan data.

This page consists of two scroll areas. The outer scroll area displays high-level status information of the student's NSLDS history record. The inner scroll area displays information on individual NSLDS records that were loaded from the student's ISIR or the NSLDS transcript file. You can delete the student's entire history or only the most recent set of loaded NSLDS information.

NSLDS information does not always load with an ISIR. To identify the NSLDS information you want to delete, match the effective date and NSLDS transaction number on the ISIR delete page with the NSLDS transaction number and transaction process date with the correct ISIR source year value on the NSLDS Delete page. These date fields match unless you use the current date as the effective date feature on the ISIR Data Load Parms, or manually overrode the ISIR effective date when the ISIR loaded.

If you override the effective date when loading ISIRs, use the ISIR Data Corrections component to compare the transaction process date to match the NSLDS data with the ISIR.

To delete every row in the grid, you delete the entire NSLDS history for the student by deleting information from the outer scroll area. Select any field in the area controlled by the outer scroll bar and delete the row.

To delete only part of the student's NSLDS history, such as data from the last ISIR, do the following:

1. Delete the appropriate row in the grid.
2. Update the NSLDS transaction number, transaction source, and last updated fields with the matching information from the current effective-dated row in the grid.
3. Set the last updated date to match the effective date value. This synchronizes the data viewed in the NSLDS inquiry page.

Field or Control	Description
Last Updated	The date the NSLDS transaction source process updated the NSLDS tables.
NSLDS Transaction Nbr (National Student Loan Data System transaction number)	Enter the NSLDS transaction number that was the source of the last update to the NSLDS history. This field is automatically updated by the most recently imported NSLDS data from the ISIR file. This field is only populated when the NSLDS Transaction Source is 'I' (ISIR Load) Deleting data at this scroll level deletes the entire NSLDS data structure. Do not delete if the transaction source is *F,* Financial Aid Transcript.

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Field or Control	Description
NSLDS Transaction Source(National Student Loan Data System transaction source)	Enter the source of the student's NSLDS information. This field is automatically updated by the most recently imported NSLDS data. The sources are: *A:* NSLDS Transfer Alert *I:* ISIR load *F:* Financial Aid Transcript *H:* NSLDS FA History. *M:* Manual
NSLDS Sequence Number(National Student Loan Data System sequence number)	Enter the NSLDS Sequence Number of the student's NSLDS information. This field is automatically updated by the most recently imported NSLDS file. This field is only populated when the **NSLDS Transaction Source** is 'A' (NSLDS Transfer Alert) or 'H' (NSLDS FA History).
Effective Date	Populated with a date to match the Transaction Process Date. This represents the date the incoming NSLDS data was generated from the National Student Loan Database System. The field can be updated.
Effective Sequence	Displays a database table key value.
ISIR Source Year	Displays the aid year of the source record.
NSLDS Seq Nbr(National Student Loan Data System sequence number)	Displays the NSLDS Sequence Number when the NSLDS Transaction Source is 'A' (NSLDS Transfer Alert) or 'H' (NSLDS FA History).
Transaction Process Date	Displays the date the CPS/FPS (ISIR) or NSLDS (FAH, TSM, or FAT) processed the data record that loaded. This is also the date the incoming NSLDS data was generated from the National Student Loan Database System.

The following tables are affected by an NSLDS delete:

- PS_NSLDS_GEN
- PS_NSLDS_FAT_AGGR
- PS_NSLDS_ISIR_DTL
- PS_NSLDS_PELL
- PS_NSLDS_OVRPYMNT
- PS_NSLDS_NAME_HIST
- PS_NSLDS_ACG
- PS_NSLDS_NSG

Viewing ISIR History

Use the ISIR History Inquiry component to view ISIR and need analysis information. This component displays all ISIR fields across all aid years. Fields that are not valid in a particular aid year appear as blank or zero.

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> **Note**
>
> Some ISIR fields the literal field value, but no text description, because the text descriptions change from one aid year to another.

For more information, see the *Electronic Data Exchange Technical References* on the U.S. Department of Education website.

Pages Used to View ISIR History

Page Name	Definition Name	Navigation	Usage
FAFSA Information	ISIR_PIA_HIST1	**Financial Aid**, and then **Financial Aid History**, and then **View Archived Application Data**, and then **ISIR History**, and then **FAFSA Information**	Review ISIR data. Includes student bio/demo data, enrollment information, background information, financial information, dependency status, and parent background and financial data.
Address Use	ISIR_ADR_MNT_SEC	Click the **Student Address** link on the FAFSA Information or Student Information page.	Review student active address.
Original ISIR Address	ISIR_ORG_ADR_SEC	Click the **ISIR Address** link on the FAFSA Information or Student Information page.	Review student original ISIR address.
Student Income Values	ISIR_ASM_ST1_H_SEC	Click the **Assumptions** link in the Student Data - Financial Information group box on the FAFSA Information or Student Information page.	Review student income.
Student Values Status	ISIR_ASM_ST2_H_SEC	Click the **Assumptions** link in the Student Data - Dependency Status Information group box on the FAFSA Information or Student Information page.	Review student household information.
Parent Household Information	ISIR_ASM_PR2_H_SEC	Click the **Assumptions** link in the Parent Data - Parent Background Information group box on the FAFSA Information or Parent Information page.	Review parent household information.

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Page Name	Definition Name	Navigation	Usage
Parent Earnings and Income Value	ISIR_ASM_PR1_H_SEC	Click the **Assumptions** link in the Parent Data - Parent Financial Information group box on the FAFSA Information or Parent Information page.	Review parent income and earnings.
Assumptions/School Codes	ISIR_PIA_HIST2	**Financial Aid**, and then **Financial Aid History**, and then **ISIR History**, and then **Assumptions/School Codes**	Review miscellaneous information, assumptions and reject overrides, reject reasons, and comments.
EFC\DB Matches\Corr	ISIR_PIA_HIST3	**Financial Aid**, and then **Manage Financial Aid History**, and then **ISIR History**, and then **EFC\DB Matches\Corr**	Review EFC information, database matches flags, and corrected fields.

Viewing ISIR Reports

This section lists ISIR reports and discusses how to use the ISIR Reject/Assumption Report.

Pages Used to Produce ISIR Reports

Page Name	Definition Name	Navigation	Usage
ISIR Assumption/Reject Ovrd (ISIR assumption/ reject override)	RUNCNTL_FAISRJAS	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **CPS Reject/ Assumption Report**, and then **ISIR Assumption/Reject Ovrd**	List students who have assumptions or rejects that have no respective overrides and students who have overrides made but no assumptions or rejects. Use this list to identify students for whom you need to apply assumption overrides manually. This report is not aid-year specific.
System Generated ISIR Report	SFA_RUNCTL_FA928	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **CPS Reject/ Assumption Report**, and then **System Generated ISIR Report**	Identify why a system generated ISIR record was created before loading system generated ISIR files. Suspend all system generated files before running this report to cause the student's ID to be determined and printed on the report.

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Page Name	Definition Name	Navigation	Usage
ISIR Suspense Detail Report	SFA_RUNCTL_FA927	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **ISIR Suspense Detail Report**	List all ISIRs that suspended or are set to error by the ISIR Load program. Data on the report derives from the ISIR Suspense Management page.
Review ISIR Correction Audits	ISIR_CORR_AUDITS	**Financial Aid**, and then **Federal Application Data**, and then **View ISIR Field Audits**	Review ISIR correction audits.

Using the ISIR Reject/Assumption Report

Use the ISIR Reject/Assumption Report to identify any current, loaded ISIR where specific CPS/FPS generated field value assumptions or reject codes have been issued. The report lists any assumed values for the following fields: **Parent number in college, Parent AGI, Parent Worksheet C total, Student number in college, Student AGI,** and **Student Worksheet C total.** The following reject codes are also listed: *B, N,* and *W.*

Consider the following scenario: A second ISIR transaction is loaded into the system that corrects assumed or rejected values on the original ISIR. If you run the Federal Methodology Need Analysis Calculator (FM NAC) without manually setting an Assumption Override, the EFC/SAI calculation may be incorrect. This is because the FM NAC doesn't suppress the assumption as the CPS/FPS does. Instead, The FM NAC invokes assumptions based on Application Processing System Specifications for Software Developers (APS Specs).

For example, a student's first ISIR has an assumed value for the parent's Worksheet C amount. You then receive and load a second ISIR for the student that confirms the initially reported value. When you then run the FM NAC, the student's EFC/SAI calculation may be incorrect. To avoid this, set an assumption override manually for the student on the Assumption Overrides panel so that the FM NAC suppresses the assumption. Process the assumption/rejects by using the ISIR Assumption and Reject override fields on the ISIR Data Corrections panel group.

The system continues to select ISIR records on the report until the following occurs:

- Records selected because of an assumed value have the corresponding assumed indicator field value set to verified or reported through the verification process or manually in the ISIR Data Corrections panel group.
- A new ISIR with no assumptions or rejects is loaded.
- Reject overrides have been set for records with reject codes.

> **Note**
>
> Because several Federal Methodology (FM) assumptions can occur against the fields used by the report, the system may select records where using the **Assumption Override** fields is not be the appropriate action to resolve the EFC/SAI calculation.

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Reviewing ISIR Correction Audits

You can review ISIR Correction Audits.

Access the Review ISIR Correction Audits page (**Financial Aid**, and then **Federal Application Data**, and then **View ISIR Field Audits**).

The system displays the **User ID** of the person who made the change, **Date/Time, Transaction Nbr** (transaction number), the field name of what changed, the original data **Old Value,** and the changed data **New Value.** The **Status** field indicates whether the field change has been submitted for correction with the CPS/FPS.

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23

Processing and Using Institutional Financial Aid Applications

Maintaining Institutional Financial Aid Applications

You can view and manage institutional financial aid application data from the College Board Profile application.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the College Board Profile and institutional application data share the same pages. If you unintentionally create multiple institutional aid records for a student from these two sources, it can cause unintended Institutional Methodology (IM) calculation results from the Institutional Need Analysis System (INAS).

> **Note**
>
> Question marks or blanks on College Board Profile data files are converted or appear as zeros in currency based numeric fields.

For further information about the fields in this component, please refer to the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas) for supporting documentation.

This section lists common elements and discusses how to:

- Review student information.
- Review custodial parent information.
- Review non custodial parent information.
- Review currency information, family information, and institutional questions.

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- Review all computed data for student and parents.

Related Topics

- Loading and Managing PROFILE Records
  Before you begin loading applications, define all PROFILE data load parameters and set up your run control options using the Financial Aid Run Controls page. This section discusses how to:
- Using INAS Batch Calculations
  This section discusses how to calculate Federal Methodology (FM) and Institutional Methodology (IM) INAS in batch for the 2022-2023 aid year and prior aid years based on the policy options at your institution.
- Performing Mass SAI/EFC Calculations
  This section discusses how to perform SAI/EFC Calculations in mass for the 2023-2024 aid year and subsequent aid years based on the policy options at your institution.

Common Elements Used in This Section

Field or Control	Description
Need Summary	Click this link to access the Need Summary page, where you can review the student's federal and institutional need calculations.
FM (federal methodology)	Click this link to access the **Federal Extension** page, where you can override SAI/EFC Local Policy Options for federal data.
IM (institutional methodology)	Click this link to access the **Institutional Need Calculation Extension 1** page, where you can override INAS Local Policy Options for institutional data.
INAS (institutional need analysis system)	Click this button to calculate an institutional Expected Family Contribution (EFC) by using the College Board's Institutional Need Analysis System (INAS). For the 2023-2024 and prior Aid Years, an internal COBOL program performs the IM and EFM (estimated federal methodology) INAS calculations. For the 2024-2025 and future Aid Years, a call is made to College Board INAS Cloud web service to perform the IM and EFM (estimated federal methodology) INAS calculations.
Calc EFC/SAI (calculate expected family contribution/student aid index)	Click to calculate an unofficial Federal Expected Family Contribution (EFC)/Student Aid Index using the FM NAC.

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Field or Control	Description
INAS NCP (institutional need analysis system non custodial parent button)	Click this button to calculate the non custodial parent contribution. For the 2023-2024 and prior Aid Years, an internal COBOL program performs the IM and EFM (estimated federal methodology) INAS calculations. For the 2024-2025 and future Aid Years, a call is made to College Board INAS Cloud web service to perform the IM and EFM (estimated federal methodology) INAS calculations. **Note:** Calculate the non-custodial parent contribution before invoking the regular INAS calculation. Calculating a non custodial parent contribution creates an INAS Extension record, selects the **Use Non-Custodial Parent Contribution** check box and populates the *PC From Non-Custodial Parent* (parent contribution from non-custodial parent) field in INAS Extension 5. After this, when the regular INAS calculation is invoked, the non-custodial parent contribution is added to the Custodial Parent contribution and overall expected family contribution.

The system displays the student's name, ID, HouseHold Type (HHA for Custodial Parent, HHB for Non Custodial Parent, HHA/HHB for both Custodial and Non Custodial Parent), institution, dependency status, application source, and aid year at the top of each review page. These two terms also appear at the top of each review page:

Field or Control	Description
HouseHold Type (household type)	Displays the type of Profile application received: • *HHA/HHB* – both custodial parent and non custodial parent applications received. • *HHA* – only custodial parent application received. • *HHB* – only non custodial parent application received.
HHB Indicated (household type b non custodial parent Profile application received indicator)	Displays whether or not a non custodial parent Profile application is indicated or can exist for a custodial parent household. • *Yes* – non custodial parent Profile application is indicated or can exist for a custodial parent household. • *No* – non custodial parent Profile application *not* indicated or *cannot* exist for a custodial parent household.

Related Topics

- Defining Federal and Institutional Methodologies
  This topic provides an overview of calculating expected contributions from families using Federal Methodology (FM) and Institutional Methodology (IM) formulas and discusses how to:

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- Overriding the Expected Family Contribution
  The system displays the override at the parent and student contribution level. Overriding the Expected Family Contribution is the same for both Federal Methodology and Institutional Methodology.

Pages Used for Institutional Applications

> **Note**
>
> The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years with valid INAS calculations. Earlier aid year institutional application data is available for display only at **Financial Aid**, and then **Financial Aid History**, and then **View Archived Application Data**, and then **Institutional Application.**

Page Name	Definition Name	Navigation	Usage
Student Data	INST_STUDENT_nn	**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Student Data**	View or enter student information.
Custodial Parent Data	INST_PARENT_nn	**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Custodial Parent Data**	View or enter custodial parent information.
Non Custodial Parent Data	INST_NCPARENT_nn	**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Non Custodial Parent Data**	View or enter non custodial parent information.
Miscellaneous Data	INST_MISC_nn	**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Miscellaneous Data**	View or enter signature, family member, school selection, and institutional question (the College Board Profile Section Q) information. You can also view FNAR messages on this page.

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Page Name	Definition Name	Navigation	Usage
Computation Summary	INST_COMP_SUMM_nn	**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Computation Summary**	View or enter computed parent and student income, allowance, and asset information using your institutional and federal methodology. The computed values appear here.

Reviewing Student Information

Access the Student Data page (**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Student Data**).

Bio/Demo and Citizenship Data

The data for the fields in this group box are populated from Campus Community Bio/Demo data.

Field or Control	Description
National ID	Displays the student's National ID. **Note:** If the Profile Application type = 4 (International Profile) and the National ID is blank, the student is loaded into Profile Staging with XXX-XX-XXXX. This permits Search/Match to take place and potentially load the student into the Institutional Application tables with the NID rendered as XXX-XX-XXXX.
Reported Country	Displays the student's *reported* country if not United States of America.
Bio/Demo Citizenship Status	Click this link to access the Campus Community Citizenship/Passport page to confirm the citizenship status of the student's Biographic/ Demographic data against the values in the **Reported Country** and **Reported Status** fields.

CSS Data

Field or Control	Description
CB FinAid ID (College Board Financial Aid ID)	Displays a unique lifetime ID assigned to the student's record by the Profile system to ensure both privacy and quick retrieval of records. When you call the College Board inquiry number with questions about specific records, it is helpful to know the student's College Board Financial Aid ID number.
Application Type	Displays: • *1* if the application is a Domestic Profile. • *2* if the application is a Canadian Profile. • *3* if the application is an International Profile.

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Field or Control	Description
Fee Payment Code Indicator	Displays **Yes** if the student used a Fee Payment Code for the institution.
Name of School	Name of the student's current school.
Low Income Pathway Eligible	Displays **Yes** if the student is part of the cohort the institution reports to the College Board prior to Profile application processing.
Profile Lite	Displays **Yes** if the student's Profile application met the institution's criteria set up with the College Board.

Student Application Dates

Field or Control	Description
Date Loaded	Displays the date that XML file from College Board was loaded into Campus Solutions.
Add College Submit Date	Displays the date that the Add College request was submitted for this school.
Correction Record	Displays *Y* if this is a Profile Correction Record; *N*, if not.
Date Application Received	Displays the date when the Profile Application was initially submitted.
Transaction Number	Displays the Profile Transaction Number.
Correction Date	Displays the date that the applicant submitted their Profile correction.

Student's Information

In this region, if a field does not have a selection of *Yes* or *No*, that means the Profile that was loaded did not contain that field. For aid year 2021–2022 onward, the *No Response* option is not available.

Field or Control	Description
Financial Aid Status	Enter the student's status as it relates to receiving financial aid.
Marital Status Code	Select the marital status to be used for financial aid purposes. This marital status can differ from the **Bio/Demo Data** page marital status.
Student IM Zip (student institutional methodology zip code)	The student zip code used for cost of living adjustment calculations. Typically matches the student permanent zip code but can be updated independently of student permanent zip code if needed.
Parent IM Zip (parent institutional methodology zip code)	The parent zip code used for cost of living adjustment calculations. Typically matches the parent permanent zip code but can be updated independently of parent permanent zip code if needed.

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Student's Income/Benefits/Resources – Base (Prior Prior Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

Student's Income/Benefits/Resources – Base+2 (Anticipated Year)

Field or Control	Description
Receive Tuition Benefits	Indicate whether or not the student receives tuition benefits from the parents' employers.
Agencies/Foundation Support	Indicate whether the student expects to receive from agencies or foundations to pay for educational expenses during any year of attendance.
Government Support	Indicate whether the student expects to receive from her government to pay for educational expenses during any year of attendance.

Student's Assets – Current

In this region, if a field does not have a selection of *Yes* or *No*, that means the Profile that was loaded did not contain that field. For aid year 2021–2022 onward, the *No Response* option is not available.

Field or Control	Description
Price	Enter purchase price of the student's home.

Student's Expenses – Base (Prior Prior Year)

Field or Control	Description
Child Support Paid	Enter the child support *paid by* the student.
Medical/Dental	Enter the medical and/or dental out of pocket expenses *paid by* the student.
Veterans Benefits	Enter the monthly amount of VA Benefits *received by* the student.
Months	Enter the number of months the veterans benefits were *received* in the calendar year.
Post 911 Benefit Percent	Enter the percentage of the full Post-9/11 GI Bill benefit for which the student is eligible.

Student's Expenses – Base+2 (Anticipated Year)

Field or Control	Description
Veterans Benefits	Enter the monthly amount of VA Benefits *received by* the student.
Months	Enter the number of months the veterans benefits were *received* in the calendar year.

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Educational Loans

Field or Control	Description
Federal Amount Borrowed	Displays total amount of Federal student loans borrowed.
Private Amount Borrowed	Displays total amount of private student loans borrowed.
Federal Amount Outstanding	Displays total amount of Federal student loan debt outstanding.
Private Amount Outstanding	Displays total amount of private student loan debt outstanding.

Currency Information

Field or Control	Description
Currency Code	Enter the currency in which the original data was reported by the student.
Currency Rate	Enter the currency conversion rate used to process the student's data.
Parent Country Co-Efficient	Enter the country coefficient used to process the parents' financial data.
Converted Currency Code	Enter the original currency converted into US dollars reported by citizens living abroad and Canadians.
Converted Currency Rate	Enter the rate the student used in converting their currency into US dollars. Reported by citizens living abroad and Canadians.
Student Country Co-Efficient	Enter the country coefficient used to process the student's financial data.

Non-Custodial Student Data

These fields display student information as reported on the Non-Custodial Profile.

Reviewing Custodial Parent Information

Access the Custodial Parent Data page (**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Custodial Parent Data**).

Parents Grid

This section of the page displays parental information including relationship to student as reported on the Profile.

Parents' Household

For INAS to make correct IM and EFM calculations, make sure you enter values in **Number Family Members** and **Number in College**.

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Parents' Income and Benefits – Base (Prior Prior Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

Field or Control	Description
Child Support Received	Enter the child support received by the parents for their dependent children.
Child Support Received Student	Enter the amount of child support the custodial household received from the non-custodial household for the applicant.

Parent's Income and Benefits – Base+1 (Recent Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

Parent's Income and Benefits – Base+2 (Anticipated Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

Field or Control	Description
Non-Custodial Parent Contribution	The amount the non-custodial parent has offered to pay for the student's educational expenses.

Parent's Assets – Current

Field or Control	Description
Price	Enter purchase price of the parents' home.
Real Estate Purchase Year	Enter purchase year of any other real estate.
Price	Enter purchase price of any other real estate.
Primary Home Debt	Enter the amount of debt the family has on the home from their original mortgage.

Parents' Expenses – Base (Prior Prior Year)

Enter the parents' expenses from the Base Year for these fields.

Field or Control	Description
Other Expenses	Enter the cost of any parental expenses not reported anywhere else on the Profile.

Parents' Expenses – Base+1 (Recent Year)

Enter the parents' expenses from the Recent Year for these fields.

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Academic Year

Field or Control	Description
Other Tuition Paid	The amount of private elementary/secondary tuition expected to be paid by the parents during the academic year.
Number of Tuition Paid	The number of children for which private elementary/secondary tuition is expected to be paid by the parents during the academic year.

Parents' Information

Field or Control	Description
Parent Type 1 and **Parent Type 2**	Select the type of parent providing information on the Profile. Values include: *Father*, *Legal Guardian*, *Mother*, *Other*, *Step Father*, *Step Mother*.
Computed Age 1 and **Computed Age 2**	Indicates the calculated age for the parent.
Biological Adoptive Parent	Identifies a dependent student's custodial parent when the biological/adoptive parents are separated, divorced, or were never married. Values include: *Parent 1* and *Parent 2*.
Veteran Indicator 1 and Veteran Indicator 2	Indicates the veteran status of parents.

Currency Information

Field or Control	Description
Currency Code	Enter the currency in which the original data was reported by the student.
Currency Rate	Enter the currency conversion rate used to process the student's data.
Country Coefficient	Enter the country coefficient used to process the student's data.
Converted Currency Code	Enter the original currency converted into US dollars reported by citizens living abroad and Canadians.
Converted Currency Rate	Enter the rate the student used in converting their currency into US dollars. Reported by citizens living abroad and Canadians.

Explanation / Certification

Profile applicants can indicate on their applications a variety of Special Circumstances that may affect the calculation of financial need. These include:

- Change in Employment
- Medical/Dental Expenses
- COVID-19
- Non-Recurring Income

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- Financial Support

Profile applicants can also indicate if they have no Special Circumstances or Special Circumstances not listed in the Profile application.

Field or Control	Description
Explanations Text	Displays the actual explanations and special circumstances text provided by the filer.

Correction Reason

Field or Control	Description
Correction Reason	Displays the Correction Reason: • 1 = Changing from Independent to Dependent. • 2= Need to add a Business or Farm. • 3= Made a mistake. • 4= Change in Employment. • 5= COVID 19. • 6 = Medical Dental Expenses. • 7 = Catastrophic Event. • 8 = Elder Care. • 9 = Nonrecurring Income. • 10 = Financial Support. • 11= Other.
Correction Explanation	Displays free form text from applicant.

Reviewing Non Custodial Parent Information

Access the Non Custodial Parent Data page (**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Non Custodial Parent Data**).

Please refer to the “Reviewing Custodial Parent Information” section of this topic for similar field descriptions. Notable exceptions are in this section.

Field or Control	Description
IM NCP (institutional methodology non custodial parent link)	Click this link to view the **INAS Institutional NCP Ext 1** page from where you can navigate further to the **INAS Institutional NCP Ext 2** and **INAS Institutional NCP Ext 3** pages. Use these pages to provide more information for the system to calculate non-custodial parent contribution using Institutional Methodology. For descriptions of the fields in these pages, refer to the similar fields described in Using FM and IM Extensions to Override Options.

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Field or Control	Description
INAS NCP (institutional need analysis system non custodial parent button)	Click this button to calculate the Institutional Methodology non custodial parent contribution. **Note:** Calculate the non-custodial parent contribution before invoking the regular INAS calculation. Calculating a non custodial parent contribution creates an INAS Extension record, selects the **Use Non-Custodial Parent Contribution** check box and populates the *PC From Non-Custodial Parent* (parent contribution from non-custodial parent) field in INAS Extension 5. After this, when the regular INAS calculation is invoked, the non-custodial parent contribution is added to the Custodial Parent contribution and overall expected family contribution. See the Common Elements Used in This Section and the Reviewing All Computed Data for Student and Parents sections for detailed information.

Non-Custodial Application Dates

Field or Control	Description
Date Loaded	Displays the date that XML file from College Board was loaded into Campus Solutions.
Add College Submit Date	Displays the date that the Add College request was submitted for this school.
Correction Record	Displays *Y* if this is a Profile Correction Record; *N*, if not.
Date Application Received	Displays the date when the Profile Application was initially submitted.
Transaction Number	Displays the Profile Transaction Number.
Correction Date	Displays the date that the applicant submitted their Profile correction.

Parents' Household

For INAS to make correct IM and EFM calculations, make sure you enter values in **Number Family Members** and **Number in College**.

Reviewing Processing Messages and Institutional Questions

Access the Miscellaneous Data page (**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Miscellaneous Data**).

Assumption Messages

The system displays the CSS INAS IM Assumptions alphanumeric code, message text, and value, if any. These are the INAS Assumptions triggered during the need analysis methodology.

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Institutional Questions

Field or Control	Description
Number	Number of an application question that the student/family believes warrants further explanation. This number may also refer to a series of additional questions that have been modified for the institution by College Board Profile.
Answer	Answer to the question shown in the **Number** field.

Reviewing All Computed Data for Student and Parents

Access the Computation Summary page (**Financial Aid**, and then **Institutional Application Data**, and then **Maintain Application 20nn-20nn**, and then **Computation Summary**).

This page is designed to display computed need analysis results based on both the parent's and student's information. Therefore, the page displays a Parent Contribution Section and a Student Contribution Section. The following sections describe what each column represents.

> **Note**
>
> Computation tables display no intermediate values until the INAS calculation is called using mass or online calculation.

> **Note**
>
> To more closely align interim calculation results with the Estimated Federal Methodology (EFM) computation worksheets from the College Board, the Computation Summary page displays an *N/A* value for several fields. For parents of dependent students and independent students with dependents, EFM calculations display *N/A* for **From Income, From Assets, Total Contribution - Income** and **Total Contribution - Assets** fields.

Contribution Summary

The PARENT CONTRIBUTION section displays three columns: **IM Base, IM w/Options,** and **EFM.**

- The **IM Base** column displays standard base INAS calculations. Although the IM Base calculation is not delivered as part of the Profile record, Oracle supports calculating the College Board's IM Base calculation if INAS is invoked after the initial load of the Profile record.
- The **IM w/Options** column is the result of using the institutional options that you set up when you defined your institutional methodology. IM w/Options is delivered as part of the Profile record.
- The **EFM** column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

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The STUDENT CONTRIBUTION section displays three columns: **IM Base, IM w/ Options,** and **EFM.**

- The **IM Base** column displays standard base INAS calculations. Although the IM Base calculation is not delivered as part of the Profile record, Oracle supports calculating the College Board's IM Base calculation if INAS is invoked after the initial load of the Profile record.
- The **IM w/Options** column is the result of using the institutional options that you set up when you defined your institutional methodology. IM w/Options is delivered as part of the Profile record.
- The **EFM** column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

Field or Control	Description
Total Income	Indicates the custodial parent's total contribution for the student from the base IM computation.

Custodial Parent Information

The system displays the calculations for **Total Income, Total Contribution, Number in College Adjustment, Contribution for Student,** contribution **From Income,** and contribution **From Assets** for **Parent's Contribution** and **Student's Contribution.**

For the PARENT CONTRIBUTION IM Base:

Field or Control	Description
Percent Income	Indicates the custodial parent's percentage of total parents income from the base IM computation.
Contribution From Income	Indicates the custodial parent's contribution from income for the student from the base IM computation.
Contribution From Assets	Indicates the custodial parent's contribution from assets for the student from the base IM computation.

For the PARENT CONTRIBUTION IM w/Options

Field or Control	Description
Percent Income	Indicates the custodial parent's percentage of total parental income from the option IM computation.
Contribution From Income	Indicates the custodial parent's contribution from income for the student from the option IM computation.
Contribution From Assets	Indicates the custodial parent's contribution from assets for the student from the options IM computation.

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Education Savings Calculations

The system displays the **Parent's** and the **Student's** Annual Education Savings Allowance **(AESA)** and Cumulative Education Savings Allowance **(CESA)** calculations. These are Profile specific calculated values used in INAS calculations for Institutional Methodology.

Income

The system displays the calculations for **Taxable Income, Untaxed Income, Adjustments to Income,** and **Total Income** for **Parent's Contribution** and **Student's Contribution.**

Allowances

The system displays the calculations for **U.S. Income Tax, FICA Taxes, Medical/Dental, Elementary/Secondary Tuition, Employment Allowance, Annual Education Savings, Income Protection Allowance/MMA, Total Allowances, Calculated Available Income,** and **Available Income** for **Parent's Contribution** and **Student's Contribution.** The **Total Contribution - Income** amount is the sum of all the fields in the **Allowances** section.

Assets

The system displays the calculations for **Cash Savings, IRA Value, Home Equity, Real Estate/Investment Equity, Adjusted Business/Farm Value, Sibling's Assets/Prepaid Tuition, Value of Trusts,** and **Net Worth** for **Parent's Contribution** and **Student's Contribution.**

The system displays the calculations for **Emergency Reserve Allowance, Cumulative Education Savings, Low Income Asset Allowance, Discretionary Net Worth, Asset Protection Allowance, Conversion Percentage,** and **Income Supplement** for **Parent's Contribution** and **Student's Contribution.** The **Total Contribution - Assets** amount is the sum of all the fields in the **Assets** section.

Non Custodial Parent Computation Summary Data

Field or Control	Description
Education Saving Calculation	Displays the non-custodial parents' Annual Education Savings Allowance (**AESA**) and Cumulative Education Savings Allowance (**CESA**) calculations. These are Profile specific calculated values used in INAS calculations for Institutional Methodology.
IM Options Non–Custodial Parents Contribution (institutional methodology options non custodial parents contribution)	Displays a logical grouping for the Non-Custodial Parent Contribution results under the IM options computation.
Non Custodial Parent Base Adjustment	Displays a logical grouping for the data elements for the biological/adoptive parent base computation results.
Non-Custodial Parent Contribution Summary	Click this link to view the **Institutional NCP Cont Summary** (institutional non custodial parent contribution summary) page displaying calculations for non-custodial parents' contribution. For descriptions of the fields in the Non-Custodial Parent Contribution Summary, refer to the similar fields already described in this Computation Summary sub-topic.

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Loading and Managing PROFILE Records

Before you begin loading applications, define all PROFILE data load parameters and set up your run control options using the Financial Aid Run Controls page. This section discusses how to:

- Load PROFILE records.
- View PROFILE load summaries.
- Manage suspended PROFILE records.
- Delete PROFILE records.

> **Note**
>
> Oracle supports the CSS / Financial Aid PROFILE File Layout (with corresponding school year) for PROFILE data received from the College Board.

Pages Used to Load and Manage PROFILE Records

> **Note**
>
> Oracle supports two academic years of PROFILE data loads.

Page Name	Definition Name	Navigation	Usage
Load Records	SFA_PF_RUNCNTL	**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Load Records**, and then **Load Records**	Import PROFILE records into the database.
Load Summary	SFA_PF_IN_LOAD	**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Load Summary**, and then **Load Summary**	From the PROFILE Staging Table, view the load status and other details of each record of a PROFILE load instance.
Suspense Management	SFA_PF_SUSP_CNTRL	**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Suspense Management**, and then **Suspense Management**	Process suspended or skipped PROFILE records.

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Loading PROFILE Applications

Every time the PROFILE Load process is run, all records are inserted into the PROFILE Staging tables. Depending on your Search/Match, Add Level, and Suspense Level Rules, the student's record is inserted into either the Institutional Application (IM) tables or managed through the PROFILE Suspense Management component. As an example, your school may only admit 60 percent of those students who actually list your School Code on the PROFILE application. Instead of loading every student who has listed your school code on the PROFILE application, you can load only those students officially admitted.

Access the Profile Load page (**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Load Records**, and then **Load Records**).

Field or Control	Description
Load Option	Select the Load Option. • Load Only — Select this option to only load the specified PROFILE files. No suspended or skipped records are reevaluated for loading. • Recycle Only — Select this option to only reevaluate suspended PROFILE records for loading. • Load and Recycle — Select this option to both load the specified PROFILE files and reevaluate suspended PROFILE records. • Load Unprocessed — Select this option to load all Unprocessed PROFILE records in the PROFILE Staging table. This skips records with a status of "Error Encountered."
Add Action	Select the action to be taken for rows that can be loaded. • Add New Record Only — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records. • Overwrite Existing Record — Add new PROFILE records into the system AND update existing PROFILE records.
Load HHB Files (load non custodial parent data files)	Select *Yes* to load non custodial parent data files.

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Field or Control	Description
Load Updated PROFILEs	Select *Yes* to load corrected PROFILE records. **Note:** Loading updated PROFILE records overwrites the data on the Application tables. For example, if you have an existing HHA transaction 1 for a student and load a new HHA transaction 2 for the same student with the **Load Updated PROFILEs** option selected, the new transaction overwrites the data on application tables. PFOFILE data is not effective- dated. **Note:** To exclude students who have already been reviewed for Financial Aid from having an updated PROFILE record loaded, verify the **Aid Proc Status Pkg Completed** option in the Profile Data Load Parameters page is set to *Suspend*.
Run Option	Select one of the following: • *Single:* Load only a single XML file • *File List Driven:* If you have multiple XML files to load, you can combine them into a single load instance by using File List. Create a .TXT file that includes a list of the multiple XML files you want to load and their corresponding source path. The PROFILE Import process reads the .TXT file and searches for the listed XML files using the path defined in the file list. If an error is found for a file in the list file, the PROFILE Import process loads the previous files into the database and then stops processing. The files after the file in error are not processed. Use the message log to view the files that the system loaded successfully or unsuccessfully as well as any corresponding error messages. **Note:**The Process Monitor can display the run status as *Success* even when a problem occurs with the load process. To determine whether all files in a file list were successfully processed, open the date-stamped list file and verify that its content does not reflect an error in processing.

> **Note**
>
> Each PROFILE XML file must have a unique file name. If you attempt to load a record with a duplicate file name, the PROFILE load process fails.

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> **Note**
>
> The PROFILE load process tracks transaction numbers and doesn't allow transactions to be loaded out of sequence. For example, if you have a transaction 3 loaded for an student, and you attempt to load transaction 2 for that student, that transaction 2 is suspended.
>
> To load a PROFILE transaction that is out of sequence, for example, transaction 3 is loaded to production, but you want to load transaction 2, you must delete transaction 3 using Profile Delete. Then, load transaction 2 using Load PROFILE or from PROFILE Suspense.

Related Topics

- Page Used to Set Up PROFILE Data Load Parameters
- Setting Up PROFILE Data Load Parameters
  Access the PROFILE Data Load Parameters page **Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **PROFILE Load Parameters**).
- Overriding the Expected Family Contribution
  The system displays the override at the parent and student contribution level. Overriding the Expected Family Contribution is the same for both Federal Methodology and Institutional Methodology.

Viewing PROFILE Load Summaries

The PROFILE Load Summary component displays the load status and other details of each record of the file selected to review from the PROFILE Staging Table.

Access the PROFILE Load Summary (**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Load Summary** , and then **Load Summary**).

PROFILE Batch Detail Records tab

This example illustrates the fields and controls on the PROFILE Load Summary page, Batch Detail Records tab. You can find definitions for the fields and controls later on this page.

Load Summary

Load Instance 1

Created Date 2020-07-20

PROFILE Load Batch Detail — Personalize | Find | First 1-6 of 6 Last

PROFILE Load Batch Detail | Student Information | Load Information | PROFILE Staging Table Data

CB FinAid ID	Load Status	ID	Student's Admit Level	Award Year	Application Type	Student Record Type	HouseHold Type	Merged HHA / HHB
2062400	Processed	FA1016	5 - Accepted/Continuing	2022	Domestic	School Added	HHA	No
2093979	Processed	FA1015	5 - Accepted/Continuing	2022	Domestic	Initial	HHA	No
2100044	Processed	FA1023	5 - Accepted/Continuing	2022	Domestic	School Added	HHA	No
2109408	Processed	FA1003	5 - Accepted/Continuing	2022	Domestic	School Added	HHA	Yes
2123890	Processed	FA1002	5 - Accepted/Continuing	2022	Domestic	Initial	HHA	No
2322673	Processed	FA1027	5 - Accepted/Continuing	2022	Domestic	Initial	HHA	No

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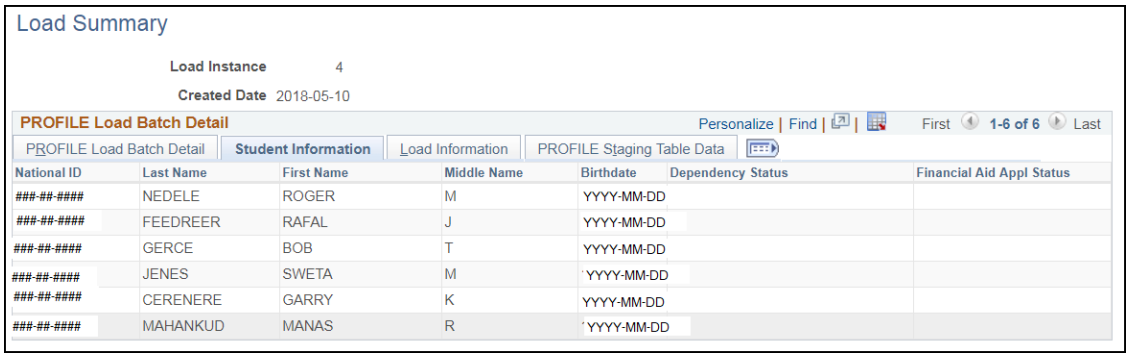
Field or Control	Description
CB FinAid ID (college board financial aid ID)	Displays the unique identifier assigned to student by the PROFILE system.
Load Status	Displays the Load Status of the record. • *Unprocessed* — Record is loaded to PROFILE Staging table but is not loaded to Inst App tables. • *Suspended* — Record failed Search/Match or PROFILE Add Level load rules. • *Processed* — Record is loaded to application table. • *User Delete* — PROFILE Application Record has been deleted by the user. • *Discarded* — Record is not loaded because it is a Noncustodial PROFILE or Registration Only record. • *Skipped* — Record meets Search/Match and PROFILE Add Level load rules, but there is an existing record and the load parameter is "Add New Record Only" or the Review Status is Complete on the Packaging Status Summary. • *Error Encountered* — Scenarios in which status is set include: Data Load Parameters not set, missing or mismatched Aid Year, SSN invalid, SQL Error, and invalid data in Search/Match fields. Status can be set by user manually when an errant record is identified on the PROFILE XML file.
Student's Admit Level	Displays the student's admit level as associated with Academic Program Statuses in the Defining Application Processing Options, Working with Applications, Reviewing Admit Level Associations page. The values are: • *5 - Accepted/Continuing* • *4 - Admitted* • *3 - Applied/Pending* • *2 - Inactive* • *1 - Has Not Applied*
Application Type	Displays the PROFILE Application Type • *Domestic PROFILE* • *Canadian PROFILE* • *International PROFILE*
Student Record Type	Displays the CSS Student Record Type • *Initial* • *School Added*
HouseHold Type	Displays the type of PROFILE application received: • *HHA* – custodial parent application received. • *HHB* – non custodial parent application received.

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Field or Control	Description
Merged HHA/HHB	Displays if custodial parent and non custodial parent PROFILE applications have been loaded: • *Yes* – Both the HHA (custodial parent) and HHB (non custodial parent) PROFILE applications have been loaded. • *No* – Only one parent PROFILE application has been loaded: HHA (custodial parent) *or* HHB (non custodial parent) as indicated by the **HouseHold Type** field.
Transaction Number	Displays the PROFILE Transaction Number.
Correction Record	Displays *Y* if this is a PROFILE Correction Record; *N* , if not.
Update Status to Error	Click this button to set the **Load Status** from *Unprocessed* to *Error Encountered.* Records with a **Load Status** of *Error Encountered* can be skipped during subsequent PROFILE Load attempts.

Student Information tab

This example illustrates the fields and controls on the PROFILE Load Summary page, Student Information tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
National ID	For United States students, displays the Social Security Number. For non-United States students, displays the student's country and National Identifier or default National Identifier.

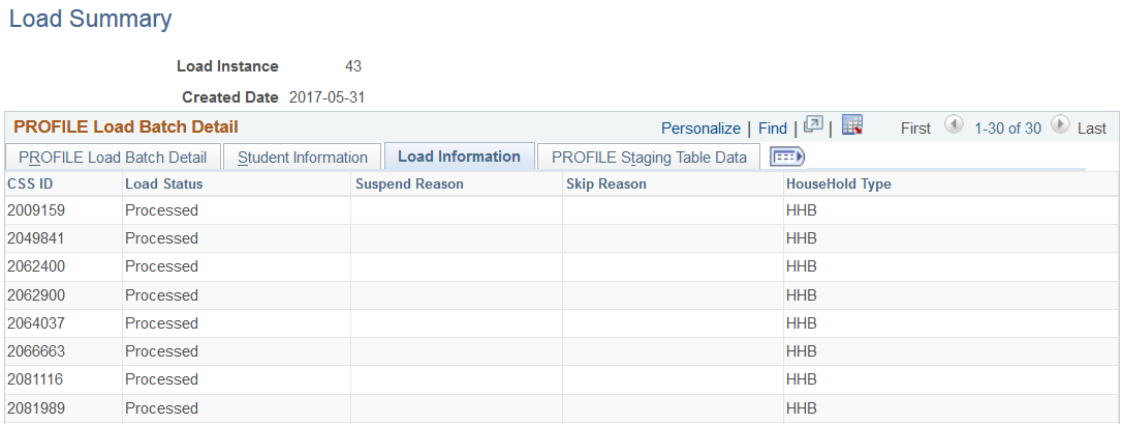
Field or Control	Description
Dependency Status	Displays *Dependent* or *Independent*

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Field or Control	Description
Financial Aid Status	• *New* – Either a first-time applicant entering student or a first-time applicant, continuing student • *Renewal* — Continuing student

Load Information tab

This example illustrates the fields and controls on the PROFILE Load Summary page, Load Information tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Suspend Reason	• *FA Term Not Built*– At least one FA Term record for the corresponding Year does not exist. • *Load Update Profile set to No*- **Load Updated PROFILEs** set to *No* when running Load Records process. • *Manual*– **Load Status** set to *Suspended* manually by the user. • *Non-Unique Student ID Found* – More than one student meets the Search/Match criteria. • *Packaging Completed*– **Student's Aid Processing Status** is *Packaging Completed*. • *Prof Tran Nbr out of Sequence* (Profile Transaction Number out of Sequence)- The PROFILE transaction number is out of sequence and, therefore, suspended. • *Student ID not Found*– No student met the specified Search/Match Rules criteria. • *Student Not Admitted*– Student met the Maximum Search/Match Level but failed the Admit Level. • *Student not at Load Level* – Student ID found, but student is not at the designated Admit Level.

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Field or Control	Description
Skip Reason	• *Final Review Flag Set* — Review Status is Complete • *Student Already Exists* — PROFILE Load encountered a matching ID despite the Add Action = Add New Record Only; therefore, the student is suspended. • *Student Not at Suspend Level* — Student fails Suspend Level rule. • *Manual*—- Load Status set to Skipped manually by the user
Alternate Institution	Displays the **Alternate Institution** for PROFILE records that were deleted by the user (status of *User Delete*) and reloaded (status of *Processed*) to a different Institution than was originally loaded.

PROFILE Staging Table Data tab

This tab displays links to view PROFILE data as it is received from the College Board.

This example illustrates the fields and controls on the PROFILE Load Summary page.

Load Summary

Load Instance 43

Created Date 2017-05-31

PROFILE Load Batch Detail Personalize | Find | First 1-30 of 30 Last

PROFILE Load Batch Detail | Student Information | Load Information | **PROFILE Staging Table Data**

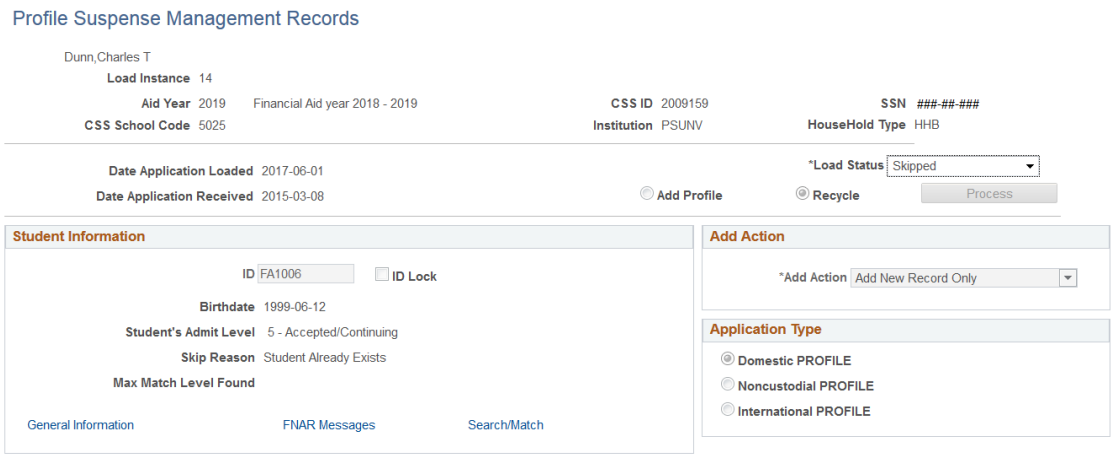
CSS ID	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2009159	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2049841	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2062400	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2062900	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2064037	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2066663	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2081116	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data
2081989	Student Data	Custodial Parent Data	Non Custodial Parent Data	Miscellaneous Data	Computation Data

Managing Suspended PROFILE Records

Access the Profile Suspense Management Records page (**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Suspense Management**, and then **Profile Suspense Management**).

This example illustrates the fields and controls on the PROFILE Suspense Management Records page. You can find definitions for the fields and controls later on this page.

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Use the PROFILE Suspense Management Records page to review and manage unmatched, unprocessed, and deleted PROFILE records.

Field or Control	Description
CSS ID (College Scholarship Service ID)	Displays the unique identifier assigned to student by the PROFILE system. **Note:** For the 2019–2020 Aid Year and forward, this field displays the College Board Financial Aid ID value for PROFILE.
Transaction Number	Displays the PROFILE Transaction Number.
Correction Record	Displays *Y* if this is a PROFILE Correction Record; *N* , if not.
Alternate Institution	Enter an Alternate Institution code to reload a user-deleted PROFILE record into the Institutional (IM) Application tables with a new Institution value. Displays only when the **Load Status** is *User Delete*. See Deleting PROFILE Records.
Load Status	Displays the current status of the record. If the **Load Status** is *Skipped* or *Suspended,* the field can be updated. If the status is *Discarded* or *User Delete*, the field is view only. **Note:** If you update the **Load Status** to *Discarded,* the **Load Status** cannot be updated again.

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Field or Control	Description
Add Profile	Select this radio button and click the **Process** button to load a suspended PROFILE record into the application table. **Note:** Selecting **Add Profile** supersedes *any* Profile Routing Control setup. **Add Profile** always adds the student into the Institutional Application tables. Even if the student fails Search/Match, because the **Add Profile** option is selected, the student is added into the Institutional Application tables with a new system-generated ID. **Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the **ID, ID Lock, Add Profile,** and **Recycle** attributes work together. **Note:** If a PROFILE record is suspended due to the **Load Updated PROFILEs** option being set to No, you must load the PROFILE record by selecting **Add Profile** and then selecting **Process**. You can't use the **Recycle** option.
Recycle	Select this radio button and click the **Process** button to have the PROFILE records reconsidered by the PROFILE load process using the Profile Routing Control setup. **Note:** Selecting **Recycle** always calls Search/Match. If Search/Match fails, then the "Search/Match No Match Action" defined in the Profile Routing Control is interrogated to determine the next step: If "Allow Add if Eligible", a new ID is created if the student meets the criteria for adding a new record. If "Suspend", the student's record remains in the Suspense Management table. **Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the **ID, ID Lock, Add Profile,** and **Recycle** attributes work together.
Process button	After selecting the **Add PROFILE** or **Recycle** radio button, click this button to invoke a real-time action to load the PROFILE record into the Institutional Application (IM) tables.
Add Action	Select the action to be taken for rows that can be loaded. • Add New Record Only — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records. • Overwrite Existing Record — Add new PROFILE records into the system AND update existing PROFILE records.
ID	Select the ID to use to load the PROFILE record into the application tables. **Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the **ID, ID Lock, Add Profile,** and **Recycle** attributes work together.

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Field or Control	Description
ID Lock	Select this check box after the selecting the **ID** to force the PROFILE load process to use the **ID** as the matching person. **Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the **ID, ID Lock, Add Profile,** and **Recycle** attributes work together.
Max Match Level Found	Displays the highest Search Match Level rule that was met for this PROFILE record.
General Information	Click this link to display general information about the student.
FNAR Messages	Click this link to display FNAR messages.
Search/Match	Click this link to access the Person Search Match page and search for a student ID to match to the PROFILE record.

The following table is a decision matrix explaining the results of different combinations of the **ID, ID Lock, Add,** and **Recycle** attributes on this page.

ID	ID Lock	Add	Recycle	Treatment
blank	unchecked	selected	not selected	Call Search/ Match. Assign record new ID if no match found. Record added.
blank	unchecked	not selected	selected	Call Search/ Match. Based on PROFILE Routing Control parameters, record added or suspended. If added, assign new ID if no match found.
blank	checked	selected	not selected	Search/Match not called. Assign record new ID, warning given. Record added.
blank	checked	not selected	selected	Search/Match not called. Based on PROFILE Routing Control parameters, record added or suspended. If added, assign new ID, warning given.

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ID	ID Lock	Add	Recycle	Treatment
not blank	unchecked	selected	not selected	Warning given before calling Search/Match. Record assigned new ID if no match found. Record added.
not blank	unchecked	not selected	selected	Warning given before calling Search/Match. Based on PROFILE Routing Control parameters, record added or suspended. If added, record assigned new ID if no match found.
not blank	checked	selected	not selected	Search/Match not called. Record added with specified ID.
not blank	checked	not selected	selected	Search/Match not called. Based on PROFILE Routing Control parameters, record added or suspended. If added, record assigned with specified ID.

Reviewing Institutional Correction Audits

This section discusses how to view institutional correction audits.

Page Used to Review Institutional Correction Audits

Page Name	Definition Name	Navigation	Usage
PROFILE Audit Fields	INST_CORR_AUDITS	**Financial Aid**, and then **Institutional Application Data**, and then **View PROFILE Audit Fields**, and then **View PROFILE Audit Fields**	Review corrections made to a student's institutional application using the Maintain Institutional Application component. This page enables you to track certain limited changes that you make to a student's institutional application data.

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Page Name	Definition Name	Navigation	Usage
PROFILE Application Delete	SFA_PF_DELETE	Access the PROFILE Application Delete page (**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Delete PROFILE Records**, and then **PROFILE Delete Utility**, and then **PROFILE Application Delete**).	Use this page to delete PROFILE applications.

Viewing PROFILE Audits

Access the Institutional Application Correction Audits page (**Financial Aid**, and then **Institutional Application Data**, and then **View PROFILE Audits**, and then **View PROFILE Audit Fields**).

The system displays the student's name, **ID, Aid Year,** and **Institution.**

The system displays the following information relating to a change made to a student's institutional application (PROFILE, Institutional, or Canadian): **User ID** of the person who made the change, the **Date/Time** of the change, the application **Source** for the **Old Value,** the record and field name of what changed, the original data**—Old,** and the changed data**—New.**

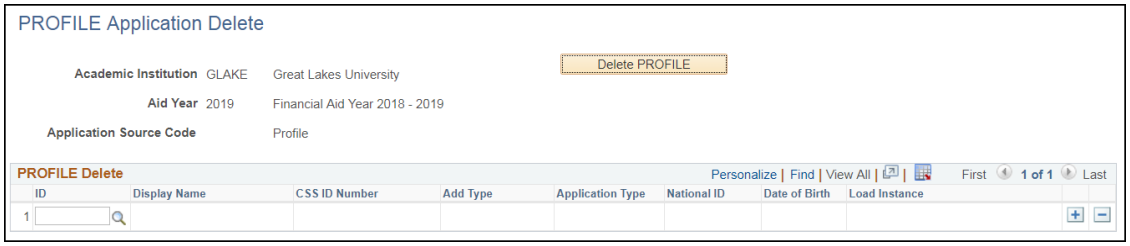
Changes are listed in reverse chronological order, by Record Name, then Field Name.

Deleting PROFILE Records

There are rare cases when a PROFILE record is accidentally loaded either to another student or to the wrong Institution. There can be also cases where you specified the wrong EmplID (or similar severe error) while manually adding a PROFILE application to the Institutional Application tables. You can use the PROFILE Application Delete process to delete these erroneously loaded records. Running this process deletes all corresponding Institutional application tables for the selected student for the specified Aid Year and Institution.

Access the PROFILE Application Delete page (**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Delete PROFILE Records**, and then **PROFILE Delete Utility**, and then **PROFILE Application Delete**).

This example illustrates the fields and controls on the PROFILE Application Delete page. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> The CSS ID column displays the unique identifier assigned to the student by College Board for the 2018–2019 Aid Year and prior Aid Years. For the 2019–2020 Aid Years and forward, this field displays the College Board Financial Aid ID value for PROFILE.

You may delete PROFILE records for multiple students within an Aid Year in a single run of this process. This removes PROFILE records from the PROFILE Application Records table.

The corresponding staging table data is not deleted and is assigned a new **Load Status** of *User Delete*.

Using PROFILE Suspense Management, you can subsequently assign user-deleted PROFILE records (those with a **Load Status** of *User Delete*) to:

- a different ID within the same Institution.

  > **Note**
  >
  > If you assign a user-deleted PROFILE record to a different ID, be aware that the target ID's CSS ID is updated with the CSS ID of the source PROFILE XML record, and the target ID is always associated with that CSS ID moving forward. Also, the *Update Biographic/Demographic data* attribute on the PROFILE Data Load Parameters setup impacts whether or not the target ID's bio/demo data is updated in Campus Community.

- a different Institution.

  When you assign a PROFILE record to a different Institution, you designate an Alternate Institution, which is used as the key Institution when accessing the record in the Maintain Institutional Application component.

  > **Note**
  >
  > If you attempt to view or retrieve the original PROFILE record using the PROFILE Load Summary search, you must specify the original Institution to which that PROFILE record was loaded. However, the Load Summary > Load Information tab displays the (target) Alternate Institution.

Once a user-deleted PROFILE record is successfully processed (loaded into the Institutional Application tables) for the corresponding Institution and Aid Year, that PROFILE record is no longer accessible using PROFILE Suspense Management.

Related Topics

- Managing Suspended PROFILE Records
  Access the Profile Suspense Management Records page (**Financial Aid**, and then **File Management**, and then **PROFILE Import**, and then **Suspense Management**, and then **Profile Suspense Management**).

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24

Performing Need Analysis

IM Connectivity Testing

Part of need analysis is determining what the student and their family can be expected to contribute to cover costs related to attending your school. This topic reviews how to test connectivity with the College Board for their INAS Cloud Service to calculate expected contributions from the student and their family using the College Board's Institutional Methodology (IM) formula and discusses how to:

- Setup the required PeopleTools Integration Broker Service Operation.
- Test your connection with the College Board.

> **Note**
>
> The INAS Cloud Service is used to calculation IM for the 2024-2025 and future Aid Years.

For more information on Institutional Methodology (IM), refer to the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas).

Pages used for IM Connectivity Testing

These are the pages to setup and text IM Connectivity with the College Board.

Page Name	Definition Name	Navigation	Usage
Service Operations	IB_SERVICE_REST	**PeopleTools**, and then **Integration Broker** , and then **Integration Setup**, and then **Service Operations Definitions**	Use this page to setup PeopleTools Integration Broker Service Operations for testing IM Connectivity with College Board INAS Cloud Service.
IM Connectivity Tester	SFA_IMTESTER_PGE	**Financial Aid**, and then **Institutional Application Data**, and then **IM Connectivity Tester**	Use this page to test IM Connectivity with the College Board INAS Cloud Service.

Setting Up Service Operations for IM Connectivity Testing

Use this setup in PeopleTools to test IM Connectivity INAS Cloud Service.

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Access the Service Operations page (**PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations Definitions**, and then **General**) and search for "SFA_EFCCALC_POST" in the **Service Operation** field.

In the **General** tab:

Field or Control	Description
REST Base URL	Using the end point URL provided by the College Board, enter the first part of the URL through the host name; for example, “https://inasapi-partner-XXXXX.finaidservices-prod.collegeboard.org” where XXXXX is an identifier for your school.
URL **Template**	Using the end point URL provided by the College Board, enter the last part of the URL, after the host name; for example, "/inas-delegate-prod/inascalc".)
Document Template	Confirm a value of "SFA_EFC_URI_DOC_MSG.V1".
Version	Confirm a value of "V1".
Version Description	Confirm a value of "EFC Calc POST".
Request **Message.Version** and **Content-Type**	For a Message Instance **Type** of "Request", confirm a **Message.Version** value of "SFA_EFC_BATCH_MSG.V1" and **Content-Type** of "application/json".
Response **Message.Version**, **Content-Type**, and **Status Code**	For a Message Instance **Type** of "Response", confirm a **Message.Version** value of "SFA_EFC_BATCH_MSG.V1", **Content-Type** of "application/json", and **Status Code** of "200".

In the **Routings** tab:

Field or Control	Description
Name	Click the link in the **Name** field of the **Routing Definitions** group box. This opens the **IB Routing Definitions** window.

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Field or Control	Description
Routing Definitions tab	Confirm the data in the following fields: **Service Operation** is "SFA_EFCCALC_POST". **Version** is "V1". **Description** is "GENERATED". **Sender Node** is your designated local database or environment connecting to the College Board. **Receiver Node** is "WADL_NODE". **Owner ID** is "FA-Need Analysis". **Log Detail** is "Header and Detail". **Active** check box is checked. **User Exception** check box is checked. Click the **Service Operation Security** link to open the **Web Access Service** window and confirm the data in the following fields: **Permission List** is "HCCPCSSA1000". **Access** is "Full Access".
Parameters tab	Confirm the data in the following fields: **External Alias** for both **Inbound Response** type and **Outbound Request** type is "SFA_EFCCALC_POST.V1".
Connector Properties tab	**Gateway ID** is "Local". **Connector ID** is "HTTPTARGET". **Delivery Mode** is "Guaranteed Delivery". **Property ID** is "Header". **Property Name** is "Content-Type". **Value** is "application/json".
Routing Properties tab	No action needed.

Testing IM Connectivity

Use this page to test your connection to the INAS Cloud Service for calculating IM.

Access the IM Connectivity Tester page (**Financial Aid**, and then **Institutional Application Data**, and then **IM Connectivity Tester**).

Field or Control	Description
Base URL	Displayed from PeopleTools Service Operation setup.
URI Template	Displayed from PeopleTools Service Operation setup.
Refresh	Click this button to update the IM Connectivity Tester page for any updates made in the Service Operation page.
Input JSON	Enter information from the Oracle-provided template with instructions on fields that will need to be updated based on your school.

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Field or Control	Description
Test Connection	Click this button to test your connection to the INAS Cloud Service.
Output JSON	Displays JSON Response.

> **Note**
>
> For further information, including troubleshooting your connection, see Testing Connectivity with the College Board INAS Cloud Service for Institutional Methodology (IM) Calculations (Doc ID 2952880.1) on https://support.oracle.com.

Defining Federal and Institutional Methodologies

This topic provides an overview of calculating expected contributions from families using Federal Methodology (FM) and Institutional Methodology (IM) formulas and discusses how to:

- Define global and federal options for the 2023-2024 and prior Aid Years.
- Define federal global options for the 2024-2025 and future Aid Years.
- Use EFC proration options. This setup won't be used after the 2023-2024 Aid year.
- Define FM budget durations for 2023-2024 and prior Aid Years. This setup won't be used after the 2023-2024 Aid year.
- Define IM budget durations.
- Define IM tax and assessment parameters. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define EFM options. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define IM value parameters 1. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define IM value parameters 2. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define IM yes and no options. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define minimum student contribution. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define asset options. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

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- Define home and asset projections. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define minimum parental contribution. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.
- Define budget options. This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

For more information on Institutional Methodology (IM) and Estimated Federal Methodology (EFM), see the College Board's INAS Users Manual. For more information on Federal Methodology (FM), see the U. S. Department of Education's Expected Family Contribution (EFC) Formula Guide and Application Processing System Specifications for Software Developers (APS Specs).

Understanding FM and IM

Part of need analysis is determining what the student and their family can be expected to contribute to cover costs related to attending your school.

Federal Methodology is based on U.S. law to determine eligibility for Federal student financial aid funds. For Federal Methodology (FM),

- For the 2023-2024 and prior Aid Years, refer to Expected Family Contribution (EFC) Formula Guide and Application Processing System Specifications for Software Developers (APS Specs) on ED's website.
- For the 2024-2025 and future Aid Years, refer to the 2024-2025 Student Aid Index (SAI) and Pell Grant Eligibility Guide and Volume 5: Edits and Rejects of the FAFSA Specifications Guide on ED's website.

Institutional Methodology (IM) is based on The College Scholarship Service IM formula. Schools use IM to determine eligibility for their private student financial aid funds. College Board CSS Profile users should refer to the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas) for supporting documentation, including the IM tables and worksheets.

> **Note**
>
> For the 2023-2024 and prior Aid Years, all pages in this component are related to IM-specific processing with the exception of the Global and Federal Options page.

> **Note**
>
> Numeric values in screen shots used to document Global Processing Options are examples only. Refer to the College Board and ED websites for tables and worksheets related to IM and FM calculations, respectively.

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Pages Used to Define FM and IM

> **Note**
>
> The navigation paths for the pages listed in the following table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Page Name	Definition Name	Navigation	Usage
Global and Federal Options	INAS_LCL_PLCY1_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **EFC 20nn–20nn Global Options**, and then **Global and Federal Options** OR **Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Global and Federal Options**	Define your global policy options for the majority of your student population. You can override these options on a student-by-student basis. The options affect your EFC calculations. You can enter values for additional Option rule sets developed by your institution.
Global Options	INAS_LCL_PLCY1_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Global Options**	Define your global policy options for the majority of your student population. You can override these options on a student-by-student basis. The options affect your EFC calculations. You can enter values for additional Option rule sets developed by your institution.
EFC Proration Options (expected family contribution proration option)	INAS_FM_PRORTN_SEC	Click the **EFC Proration Options** link on the Global and Federal Options page.	Define your proration parameters. **Note:** This page is only used for 2023-2024 and prior Aid Years.
FM Budget Durations	INAS_FM_DUR_SEC	Click the **FM Budget Durations** link on the Global and Federal Options page.	Define global options for federal academic and nonstandard budget durations. **Note:** This page is only used for 2023-2024 and prior Aid Years.

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Page Name	Definition Name	Navigation	Usage
IM Budget Durations	INAS_IM_DUR_SEC	Click the **IM Budget Durations** link on the Global and Federal Options page.	Define global options for institutional academic and nonstandard budget durations. **Note:** Total budget durations must match the budget durations defined in the College Board's Need Analysis Options (NAO) website.
IM Tax/Assess Parms (institutional methodology tax assessment parameters)	INAS_LCL_PLCY2_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Tax/Assess Parms**	Define IM INAS calculation options for parents and students **Note:** This page is only used for 2023-2024 and prior Aid Years.
EFM Options (estimated federal methodology options)	INAS_LCL_PLCY3_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **EFM Options**	Define EFM INAS calculation options for parents and students. **Note:** This page is only used for 2023-2024 and prior Aid Years.
IM Value Parms 1 (institutional methodology value parameters 1)	INAS_LCL_PLCY4_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Value Parms 1**	Define IM INAS calculation options for parents and students. **Note:** This page is only used for 2023-2024 and prior Aid Years.
IM Value Parms 2 (institutional methodology value parameters 2)	INAS_LCL_PLCY11_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Value Parms 2**	Define value parameters for multi-college enrollment to define treatment for more than one student in college. **Note:** This page is only used for 2023-2024 and prior Aid Years.
IM Yes/No Options (institutional methodology yes/no options)	INAS_LCL_PLCY10_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Yes/No Options**	Define IM INAS calculation options for parents and students. **Note:** This page is only used for 2023-2024 and prior Aid Years.

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Page Name	Definition Name	Navigation	Usage
Minimum SC Income (minimum student contribution income)	INAS_LCL_PLCY5_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Minimum SC Income**	Define the minimum institutional student contribution values for dependent students and independent students. **Note:** This page is only used for 2023-2024 and prior Aid Years.
Asset Options	INAS_LCL_PLCY6_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Asset Options**	Define options and limitations for assessing parent and student assets other than the home. **Note:** This page is only used for 2023-2024 and prior Aid Years.
Home/Asset Projections	INAS_LCL_PLCY7_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Home/Asset Projections**	Define options and values for assessing home equity for parents and students. Define asset assessment rates. **Note:** This page is only used for 2023-2024 and prior Aid Years.
Minimum PC Range (minimum parental contribution range)	INAS_LCL_PLCY8_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Minimum PC Range**	Define institutional minimum parental contribution values based on income ranges. **Note:** This page is only used for 2023-2024 and prior Aid Years.
Budget Options	INAS_LCL_PLCY9_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Budget Options**	Define allocation of total parental contribution to children on the basis of educational costs. **Note:** This page is only used for 2023-2024 and prior Aid Years.

Defining Global and Federal Options for 2023-2024 and Prior Aid Years

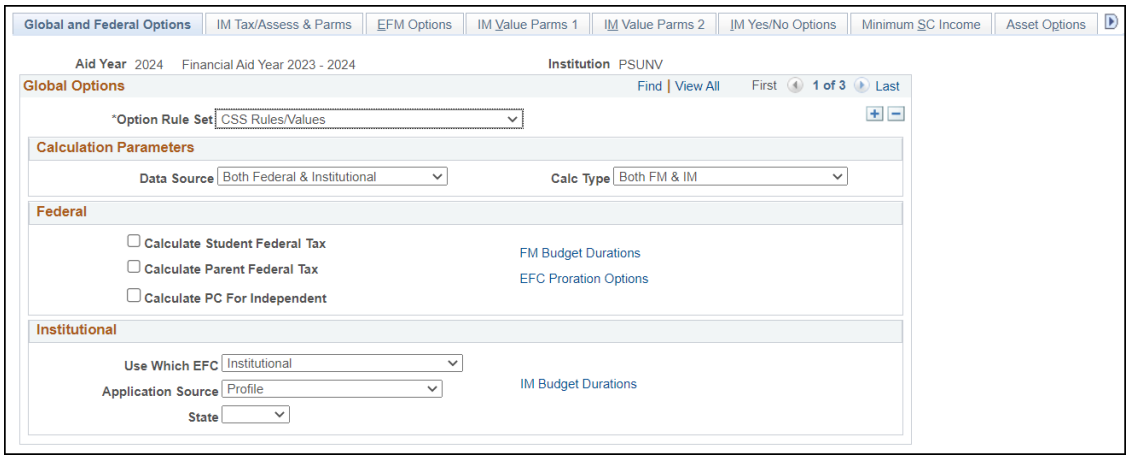
Use this page to define EFC calculation **Global and Federal Options** for ISIR records or Profile records by **Aid Year** and **Institution**.

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> **Note**
>
> The system always makes available the three most recent Aid Year versions of the EFC Global Options component. For the 2021-2022 and 2022-2023 Aid Years, the page name remains "INAS 20nn-20nn Global Options". For the 2023-2024 and future Aid Years, the navigation is "NA 20nn-20nn Global Options".

Access the Global and Federal Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Global and Federal Options**).

This example illustrates the fields and controls on the Global and Federal Options page. You can find definitions for the fields and controls later on this page.



Use this page to set the EFC calculation options for ISIR or Profile records.

Field or Control	Description
Option Rule Set	Select the Option Rule Set. The Option Rule Set value enables full flexibility to determine how need analysis is processed for different academic careers or academic programs; it is linked to a specific academic career or program through the valid careers for aid year and valid programs for aid year tables. Your institution can create additional Option Rule Sets. The Option Rule Set refers to the Option Base Rules delivered with the Financial Aid system. Values are: *CSS Rules/Values, Health Professional,* and *Undergraduate/Graduate.*

Global

Use the **Global** group box to define the parameters that control general processing options related to methodologies used.

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Field or Control	Description
Data Source	Select the Data Source that you want the EFC Calculation process to use to retrieve student information. Select: *Both Federal & Institutional* (both federal and institutional) to use both sets of data to calculate EFCs for either Profile or ISIR records. *Federal Data* to use only federal data to calculate a FM EFC for ISIR records only. *Institutional* to use only institutional data to calculate an IM EFC for PROFILE records only.
Calc Type (calculation type)	Select the calculation type: *Federal Methodology* to calculate a FM EFC for ISIR records only. *Both FM & IM* (both federal methodology and institutional methodology) to calculate EFCs for either PROFILE or ISIR records. *Institutional Methodology* to calculate an IM EFC for PROFILE records only.

Federal

Use the **Federal** group box to define how the Federal Methodology Need Analysis Calculator (FM NAC) processes federal ISIR data.

Field or Control	Description
Calculate Student Federal Tax	Select to calculate student federal tax as defined by the federal tax bracket and rate for the applicable tax year.
Calculate Parent Federal Tax	Select to calculate parent federal tax as defined by the federal tax bracket and rate for the applicable tax year.
Calculate PC for Independent (calculate parent contribution for independent students)	Select to calculate a parental contribution for independent students if parental data is available. The parental contribution is calculated, but not added to the EFC.
FM Budget Durations	Click this link to access the FM Budget Durations page, which shows academic and non-standard durations for both dependent and independent students.
EFC Prorations Options	Click this link to access the EFC Proration Options page.

Institutional

Use the **Institutional** group box to define how INAS computes your IM.

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Field or Control	Description
Use Which EFC	Select a value to determine the institutional EFC displayed on the Need Summary page and used in the Award Entry component. Values are: *Estimated Federal* (estimated federal methodology): Select to display and use the EFM-EFC. *Greatest:* Select to compare base, IM with options, and estimated federal EFC, and then use the greatest EFC value of the three. *Institutional W/Opt:* Select to use the IM-EFC as a result of the calculation of IM with options. *Institutional:* Select to use the IM-EFC as a result of the base IM calculations.
Application Source	Select an application source. Values are: *FT Canada Student Loan* (full-time Canada Student Loan): Used in Canadian Need Analysis. *Institutional Application.* *PT Canada Student Loan* (part-time Canada Student Loan): Used in Canadian Need Analysis. *Profile.*
State	Select the state in which your institution is located. INAS uses this field to determine a student's budget requirements.
IM Budget Durations	Click this link to access the IM Budget Durations page, which shows academic and non-standard durations for both dependent and independent students.

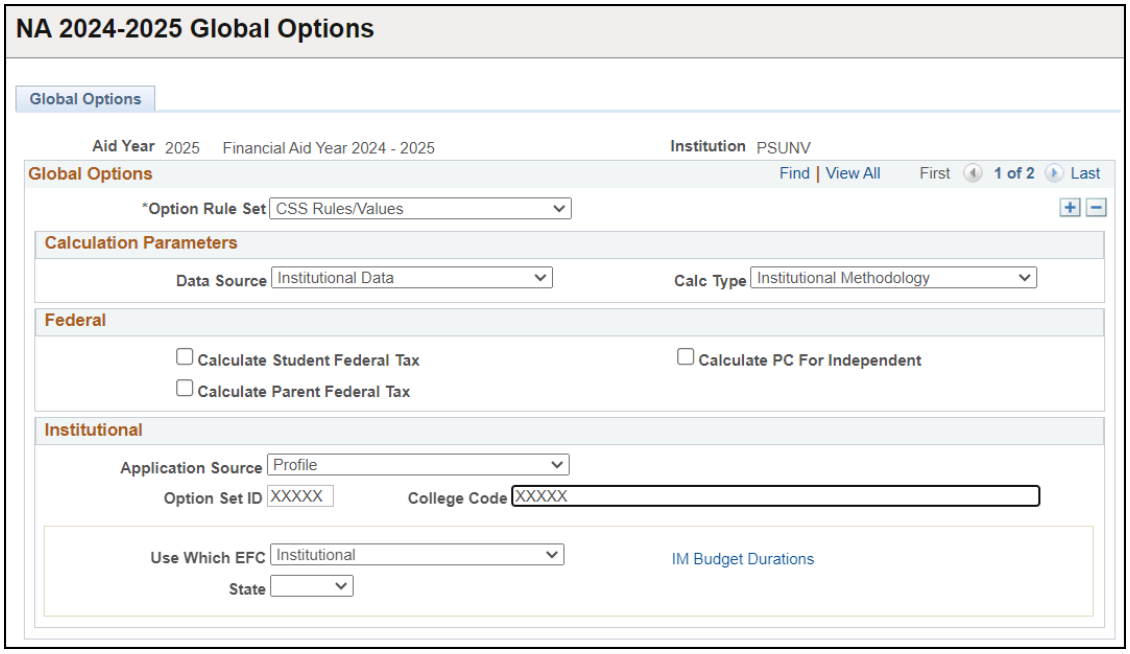
Defining Global Options for 2024-2025 and Future Aid Years

Use this page to define FM Student Aid Index (SAI) IM Expected Family Contribution (EFC) calculation **Global Options** for ISIR records or Profile records by **Aid Year** and **Institution** for the 2024-2025 and future Aid Years.

Access the Global Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Global Options**).

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

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Use this page to set the FM SAI and IM EFC calculation options for ISIR or Profile records, respectively.

Field or Control	Description
Option Rule Set	Select the Option Rule Set. The Option Rule Set value enables full flexibility to determine how need analysis is processed for different academic careers or academic programs; it is linked to a specific academic career or program through the valid careers for aid year and valid programs for aid year tables. Your institution can create additional Option Rule Sets. The Option Rule Set refers to the Option Base Rules delivered with the Financial Aid system. Values are: *CSS Rules/Values, Health Professional,* and *Undergraduate/Graduate.*

Calculation Parameters

Use the **Calculation Parameters** group box to define the parameters that control general processing options related to methodologies used.

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Field or Control	Description
Data Source	Select the Data Source that you want the FM SAI/IM EFC Calculation process to use to retrieve student information. Select: *Both Federal & Institutional* (both Federal and institutional) to use both sets of data to calculate FM SAIs/IM EFCs for either ISIR or Profile records. *Federal Data* to use only federal data to calculate a FM SAI for ISIR records only. *Institutional* to use only institutional data to calculate an IM EFC for Profile records only.
Calc Type (calculation type)	Select the calculation type: *Federal Methodology* to calculate a FM SAI for ISIR records only. *Both FM & IM* (both federal methodology and institutional methodology) to calculate FA SAIs/IM EFCs for either ISIR or Profile records. *Institutional Methodology* to calculate an IM EFC for Profile records only.

Federal

Use the **Federal** group box to define how the Federal Methodology Need Analysis Calculator (FM NAC) processes federal ISIR data to calculate an SAI.

Field or Control	Description
Calculate Student Federal Tax	Select to calculate student federal tax as defined by the federal tax bracket and rate for the applicable tax year.
Calculate Parent Federal Tax	Select to calculate parent federal tax as defined by the federal tax bracket and rate for the applicable tax year.
Calculate PC for Independent (calculate parent contribution for independent students)	Select to calculate a parental contribution for independent students if parental data is available. The parental contribution is calculated, but not added to the EFC.

Institutional

Use the **Institutional** group box to define how INAS computes your IM EFC.

Field or Control	Description
Application Source	The **Application Source** is **Profile**.
Option Set ID	Enter the token ID provided by the College Board for each Global Option that is created within the College Board's Need Analysis Options (NAO) website. You are required to setup an Option Rule Set for each Global Option created in the NAO website.
College Code	Enter the College Code provided by the College Board for your institution.

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Field or Control	Description
Use Which EFC	Select a value to determine the institutional EFC displayed on the Need Summary page and used in the Award Entry component. Values are: *Estimated Federal* (estimated federal methodology): Select to display and use the EFM-EFC. *Greatest:* Select to compare base, IM with options, and estimated federal EFC, and then use the greatest EFC value of the three. *Institutional W/Opt:* Select to use the IM-EFC as a result of the calculation of IM with options. *Institutional:* Select to use the IM-EFC as a result of the base IM calculations.
State	Select the state in which your institution is located. INAS uses this field to determine a student's budget requirements.
IM Budget Durations	Click this link to access the IM Budget Durations page, which shows academic and non-standard durations for both dependent and independent students. **Note:** This setup is also completed in the College Board NAO website. You are required to ensure that the summed value of your IM Budget Durations match the total Budget Duration value set in the NAO website for the corresponding Global Option.

Using EFC Proration Options (2023-2024 and Prior Aid Years Only)

Use this page to select IM EFC Proration Options.

> **Note**
>
> This page is only used for FM EFC Proration setup for the 2023-2024 and prior Aid Years.

Access the EFC Proration Options page (click the **EFC Proration Options** link on the Global and Federal Options page).

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Field or Control	Description
EFC Proration Method (expected family contribution proration method)	Select one of the following: • *Adjust Based on Total EFC:* If you select this option, the system displays the **Non-Standard Months** field. The system adjusts the EFC based on the total number of budget duration months for the academic and nonstandard award periods. You can use the default functionality by selecting FA Term Based for Non-Standard Months or force the use of leading or trailing months to determine the nonstandard award period contribution regardless if the nonstandard term leads or trails. • *Proportion Monthly Share:* If you select this option, the system uses the total EFC based on the total number of budget duration months for academic and nonstandard and distributes the EFC proportionally between the award periods. • *Use Monthly EFCs:* If you select this option, the system uses the actual monthly EFC based on the total number of budget duration months for each award period. For example, if academic budget duration is set to 9 and nonstandard is set to 2, then the system uses the actual 9-month EFC for academic and the actual 2-month EFC for nonstandard. No calculations are performed to subtract one or the other from the total EFC. **Note:** Using this method might cause your total EFC to exceed the 12-month EFC.
Non-Standard Months	The system uses this field in conjunction with the **EFC Proration Method** of *Adjust Based on Total EFC.* Select from: • *FA Term Based:* Determines which award period leads based on terms set in FA Term and award period designation in Valid Terms for Careers. • *Leading Months:* Treats the nonstandard term as leading regardless of nonstandard term designation in FA Term. • *Trailing Months:* Treats the nonstandard term as trailing regardless of nonstandard term designation in FA Term.

Defining FM Budget Durations (2023-2024 and Prior Aid Years Only)

Use this page to define FM Budget Durations for both Dependent and Independent students.

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> **Note**
>
> This page is only used for FM Budget Duration setup for the 2023-2024 and prior Aid Years.

Access the FM Budget Durations page (click the **FM Budget Durations** link on the Global and Federal Options page).

Dependent Students

Field or Control	Description
Academic	Enter the number of months for the academic term to be considered during need analysis for dependent students.
Non-Standard	Enter the number of months for the nonstandard term to be considered during need analysis for dependent students.

Independent Students

Field or Control	Description
Academic	Enter the number of months for the academic term to be considered during need analysis for independent students.
Non-Standard	Enter the number of months for the nonstandard term to be considered during need analysis for independent students.

Defining IM Budget Durations

Use this page to define IM Budget Durations for both Dependent and Independent students.

> **Note**
>
> Total budget duration number of months must match the budget durations defined in the College Board's Need Analysis Options (NAO) website.

Access the IM Budget Durations page (click the **IM Budget Durations** link on the Global and Federal Options page).

Dependent Students

Field or Control	Description
Academic	Enter the number of months for the academic term to be considered during need analysis for dependent students.

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Field or Control	Description
Non-Standard	Enter the number of months for the nonstandard term to be considered during need analysis for dependent students.

Independent Students

Field or Control	Description
Academic	Enter the number of months for the academic term to be considered during need analysis for independent students.
Non-Standard	Enter the number of months for the nonstandard term to be considered during need analysis for independent students.

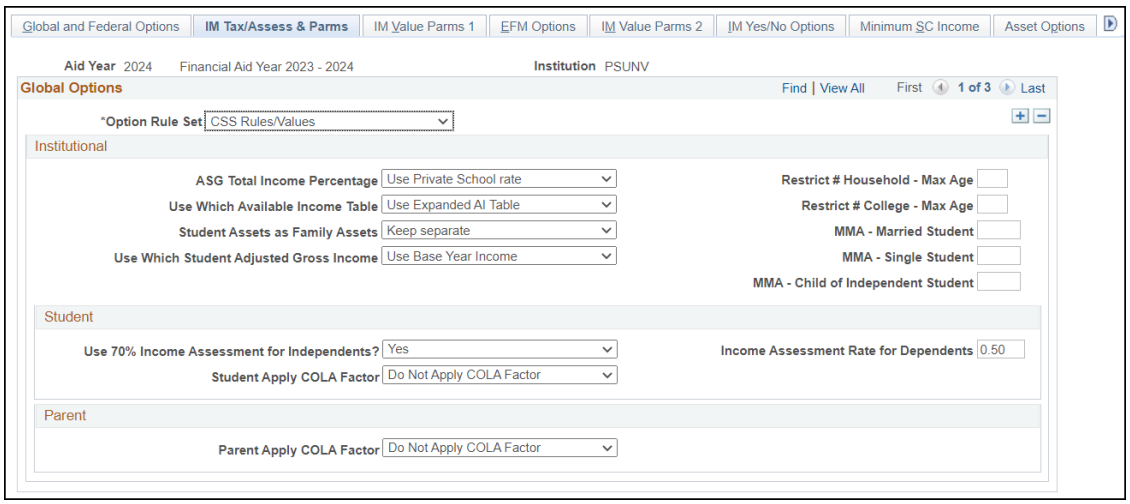
Defining IM Tax and Assessment Parameters (2023-2024 and Prior Aid Years Only)

Use this page to define IM Tax and Assessment parameters for both Dependent and Independent students.

> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the IM Tax/Assess & Parms page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Tax/Assess Parms**).

This example illustrates the fields and controls on the IM Tax/Assess & Parms page. You can find definitions for the fields and controls later on this page.



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Institutional

Field or Control	Description
ASG Total Income Percentage (annual savings goal total income percentage)	Select a value to determine an appropriate ASG total income percentage. This percentage is used as an allowance against income. Values are: • Use Private School rate. This is the default option. • Use Public School rate. • Use Public/Private School rate. **Note:** College Board CSS Profile users should refer to the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas) for supporting documentation.
Use Which Available Income Table	Select a value to determine which Available Income Assessment Rate table to use. Values are: • Use Expanded AI (available income) table. This is the default value. • Use Legacy AI (available income) table.

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Field or Control	Description
Studnt Assets as Family Assets (student assets as family assets)	Select *All Student Assets* to have all of the student's assets count as parent assets. Student assets are summed in the parent column. These calculation adjustments occur: 1. Family Total Net Worth (FTNW) FTNW = Parents' Total Net Worth (NW) + Student's Total NW. 2. Family Discretionary Net Worth (FDNW) FDNW = FTNW - Asset Protection Allowances. 3. The Asset Conversion rate is then applied to the FDNW to produce the family contribution from assets (FCA) where PC (parental contribution) = PCI (parent contribution from income) + FCA, and TFC (total family contribution) = PC + SCI (student contribution from income). 4. In the student column, student assets equal zero and student contribution (SC) = SCI, because all student assets have been moved to the parent column. Select *All but Trusts* to have all of the student's assets except for the value of trust funds count as parent assets. The only student assets summed in the student column are trust funds. These calculation adjustments occur: 1. Family Total Net Worth (FTNW) FTNW = Parents' Total Net Worth (NW) + (Student's Total NW - Student's Value of Trusts). 2. Student Contribution From Assets (SCA) SCA = Student's Value of Trusts * Asset Conversion rate. 3. Family Discretionary Net Worth (FDNW) FDNW = FTNW - Asset Protection Allowances. 4. The Asset Conversion rate is then applied to the FDNW to produce the family contribution from assets (FCA) where: PC (parental contribution) = PCI (parent contribution from income) + FCA, SC (student contribution) = SCI (student contribution from income) + SCA, and TFC (total family contribution) = PC + SC. Select *Keep separate* to use the default calculation. Parent assets are summed in the parent column and student assets are summed in the student column. If you leave this field blank, the system automatically enters *Separate* and uses the default calculation. Select *Stu Assets 5% and Trusts 25%* to have the EFC calculation process assess student assets at 5 percent and the student's trust funds at 25

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Field or Control	Description
	percent when calculating the student contribution portion of the EFC.
Use Which Student AGI (use which student adjusted gross income)	Select how the student adjusted gross income is represented: • Use Anticipated Year Income • Use Base Year Income

Field or Control	Description
Rstrct # Household - Max Age (restrict number in household - maximum age)	Enter the value. You can restrict the family size used in the calculation by establishing an age threshold for siblings or dependents. For example, the calculation would not include an allowance for a member in the household over the maximum age set by the institution.
Rstrct # in College - Max Age (restrict number in college - maximum age)	Enter the value. You can restrict the number in college used in the calculation by establishing an age threshold for family members in college. For example, the calculation would not include an allowance for a member of the household in college over the maximum age set by the institution.
MMA-Married Student (monthly maintenance allowance for married student)	Enter a value to override the default MMA rate for a married student.
MMA-Single Student (monthly maintenance allowance for single student)	Enter a value to override the default MMA rate for a single independent student.
MMA Child of Indep Student (monthly maintenance allowance for child of an independent student)	Enter a value to override the default MMA rate for a child of an independent student.

STUDENT

Field or Control	Description
Use 70% Income Assmnt for Ind (use 70 percent income assessment for independent)	This field refers to the available income assessment rate for independent students. Select from these values: • *Yes:* Uses 70 percent for income assessment. This is the default. • *No:* Select if you elect not to use the 70 percent income assessment; the **Alt Income Assessment Rate** field appears on the page.

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Field or Control	Description
Alt Income Assessment Rate (alternate income assessment rate)	When you select *No* for the **Use 70% Income Assmnt** for Ind option, enter the **Alt Income Assessment Rate**. Available options: Blank = No alternate rate provided; INAS will use the standard income assessment rate for independent students nnn = User defined number value; activate an alternate user-defined rate between 0% and 100%. For example, to specify 50%, enter "050"'. Entering "000" sets the rate to 0%.
Income Assmnt Rate for Dep (income assessment rate for dependent)	Enter an income assessment rate for dependent students. The default is 50 percent.
Student Apply COLA Factor (student apply cost of living adjustment factor)	Select from these values: • **Do not apply COLA factor** • **Apply COLA factor**

PARENT

Field or Control	Description
Parent Apply COLA Factor (student apply cost of living adjustment factor)	Select from these values: • **Do not apply COLA factor** • **Apply COLA factor**

Defining EFM Options (2023-2024 and Prior Aid Years Only)

Use this page to define Estimated Federal Methodology (EFM) options.

> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the EFM Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **EFM Options**).

Select an **Option Rule Set** and the **EFM-Profile** options for **Student** and Parent.

STUDENT

Field or Control	Description
Use Which IM Income (use which institutional methodology income)	Select which student income field to use: • Use IM Income Fields • Use IM Reported Income

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PARENT

Field or Control	Description
Use Which IM Income (use which institutional methodology income)	Select which parent income field to use: • Use IM Income Fields • Use IM Reported Income

Defining IM Value Parameters 1 (2023-2024 and Prior Aid Years Only)

Use this page to define IM Value parameters.

> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the IM Value Parms 1 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Value Parms 1**).

Select an **Option Rule Set**, then, use the default values or enter the percentages and values set by your institution for students and parents.

Defining IM Value Parameters 2 (2023-2024 and Prior Aid Years Only)

Use this page to define additional IM Value parameters.

> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the IM Value Parms 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Value Parms 2**).

Select an **Option Rule Set** and the IM values for multiple dependents in college.

Defining IM Yes and No Options (2023-2024 and Prior Aid Years Only)

Use this page to select Yes/No options.

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> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the IM Yes/No Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **IM Yes/No Options**).

Select an **Option Rule Set** and the Yes/No options for **Student** and **Parent**.

STUDENT

Field or Control	Description
Calc PC For Independent (calculate parental contribution for independent)	Select to use the parents' information in the calculation for an independent student.
Use FM Tx (use federal methodology tax)	Select to use the FM state and local income tax computation table in the calculation. When this check box is selected in conjunction with the **Ind Use Par St Tax Alwnc** check box, **Use FM Tx** takes priority for independent students.
Add Non Cust PC to PC (add noncustodial parent contribution to parent contribution)	Select to combine the non-custodial parent's contribution to the parent contribution.
Ind Use Par St Tax Alwnc (independent use parent state tax allowance)	Select if the student is independent with dependents but you want to use the parent's state tax allowance table in the calculation. When this check box is selected in conjunction with the **Use FM Tx** check box, **Use FM Tx** takes priority for independent students.
Add Hope/LTL (add Hope/Lifetime Learning Credit)	Select to let the system determine whether to add this value to taxes, based on federal tax allowance against income and tax filing status, as shown in the following table. The column headings represent the value of the **Fed Tax Allwnc Against Income** field from the IM Tax/ Assess Parameters page.

For this Tax Filing Status:	***CSS Rules* will:**	***Calc Tax* will:**	***Rptd Tax* will:**
Completed Return	Add Hope to taxes.	Not add Hope to calculate taxes.	Add Hope to taxes.
Will File Return	Not add Hope to calculate taxes.	Not add Hope to calculate taxes.	Add Hope to taxes.

When the INAS calculates taxes, it compares the values for reported taxes and calculated taxes and uses the lower value in subsequent calculations. This table demonstrates how the system processes the Hope value when reported taxes are lower than calculated taxes:

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For this Tax Filing Status:	*CSS Rules* will:	*Calc Tax* will:	*Rptd Tax* will:
Completed Return	Add Hope to taxes.	Add Hope to taxes only if reported is lower than calculated.	Add Hope to taxes.
Will File Return	Add Hope to taxes only if reported is lower than calculated.	Add Hope to taxes only if reported is lower than calculated.	Add Hope to taxes.

> **Note**
>
> Reported tax amounts are generally higher than calculated tax amounts.

Field or Control	Description
Alt Min SCI (alternate minimum student contribution from income)	Clear to indicate *No* (default); select to indicate *Yes* for this Yes/No option. If the check box is *not* selected, the application performs the Alternate Minimum Student Contribution from Income calculation using the following calculations 1. Multiply the Student's Available Income by the Available Income Assessment Rate (Parent's Marginal Rate from Income Band). For example, 10, 000 USD x .22 = 2,200 USD. 2. Compare the result (2,200 USD) to the Student Standard Contribution from Income. For example, 2,150 (Non-First Year Dependent Students) and take the higher of the two amounts. In this case, 2,200. 3. To obtain the Student Contribution Cap multiply the Total Parent Contribution by .50. For example, 6,000 USD x .50 = 3,000 USD. 4. The Minimum Student Contribution from Income is the lesser of the value in Step 2 (2,200 USD) or the Student Contribution Cap (3,000). In this case it is 2,200 USD.
Calculate Intl Student Contrib (calculate international student contribution)	Select to calculate an international *student* contribution if there is enough information available.
IM < FM (institutional methodology is less than federal methodology)	Select to allow the calculated IM EFC to be below the calculated FM.

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PARENT

Field or Control	Description
Use Parent Reported PC (use reported parent contribution)	Select to enforce the amount that the parents volunteered to contribute, if that amount is higher than the amount calculated by the system.
Use FM Tx (use federal methodology tax)	Select to use the FM state and local income tax computation table in the calculation.
Allow Parent Other Loss	Select to allow losses taken on a parent's income tax. This results in a lower EFC.
Allow Parent Bus/Farm Loss	Select to allow losses taken on a parent's income tax, such as depreciation in a business. This results in a lower EFC.

> **Note**
>
> By default, the system disallows losses on business, farm, or other. By selecting **Allow Parent Other Loss** or **Allow Parent Bus/Farm Loss,** you allow the loss to be included in the calculation.

Field or Control	Description
Add Hope/LTL (add Hope/Lifetime Learning Credit)	Select to have the system determine whether to add this value to taxes based on federal tax allowance against income and tax filing status, as shown in the previous table. The column headings in the table represent the value of the **Fed Tax Allwnc Against Income** field from the IM Tax/Assess Parameters page.
Exclude Low Income Asset Alwnc (exclude low income asset allowance)	Select to calculate without using the low income asset allowance.
Exclude FSA for Health Care	Select to exclude Flexible Spending Account for Health Care funds from total untaxed income. Default is selected.
Exclude FSA for Dependent Care	Select to exclude Flexible Spending Account for Dependent Care funds from total untaxed income. Default is selected.
Exclude HSA for Pre-Tax Contrib	Select to exclude Health Saving Account funds from total untaxed income. If not selected, Health Saving Account funds are excluded from total untaxed income.

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Field or Control	Description
Limit International IPA/MMA (limit international student's parental income protection allowance)	Select to limit an international student's Parental Income Protection Allowance (IPA) to an amount greater than or equal to 25% of the parental income. • *Selected* Limit non-US Parental IPA/MMA to an amount not less than 25% of parent total income and not greater than an equivalent domestic IPA value - only for parent country coefficient less than 0.1. • *Unselected* Do not limit student's IPA/MMA amount; normal processing.
IM < FM	Select to allow the calculated IM EFC to be less than the calculated FM.

Defining Minimum Student Contribution (2023-2024 and Prior Aid Years Only)

Use this page to define minimum student contributions.

> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the Minimum SC Income page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Minimum SC Income**).

Select an **Option Rule Set** and enter the minimum institutional student contribution values set by your institution for dependent and independent students. IM uses a minimum student contribution from income, which you can adjust. The system uses these values to determine whether the calculated or minimum contribution is used.

Institutional

Field or Control	Description
Use Default Minimum Student Contribution Amounts	Select from these values: *Yes:* Use the defaults. *No:* Make manual changes to the minimum student contribution amounts.

Defining Asset Options (2023-2024 and Prior Aid Years Only)

Use this page to define IM Asset Options for Dependent and Independent students.

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> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the Asset Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Asset Options**).

Institutional

Field or Control	Description
Asset Options	Select asset options. Values are: *Do not project assets:* INAS does not impute a value for assets, reported amounts are used. *Project assets*: INAS uses the *Yield %* field to project assets.
Yield %	Enter the asset yield percentage. Values are 1% to 9%. Blank is treated as 0%.
Tolerance	Set up the appropriate and tolerance to compare the reported value to the imputed value.

> **Note**
>
> The **Asset Option of Individual Projection** is not available for students.

Defining Home and Asset Projections (2023-2024 and Prior Aid Years Only)

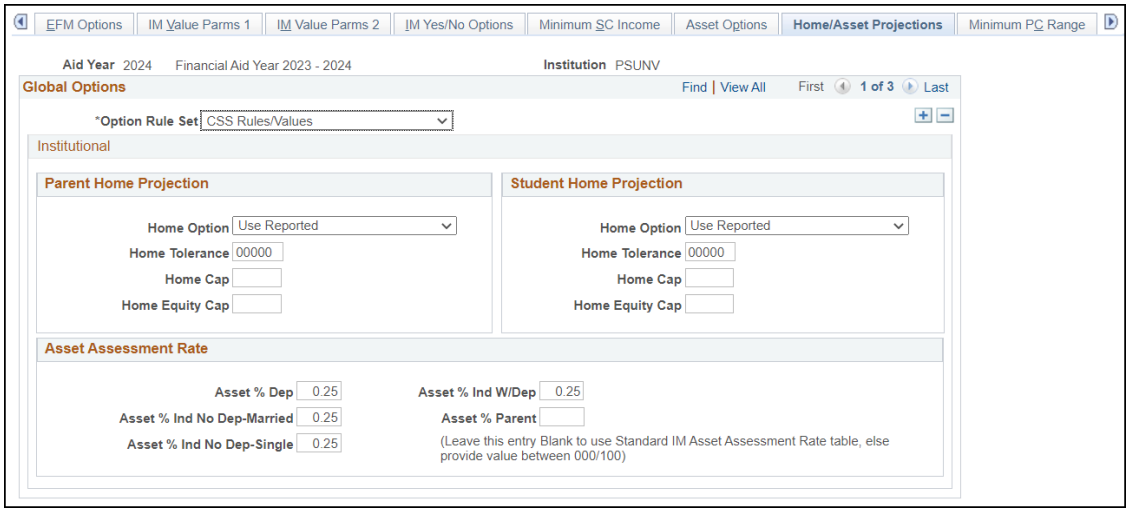
Use this page to define Home and Asset Projections.

> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the Home/Asset Projections page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Home/Asset Projections**).

This example illustrates the fields and controls on the Home/Asset Projections page. You can find definitions for the fields and controls later on this page.

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Institutional

Field or Control	Description
Home Option	Select the home option for parents and independent students. Values are: *Use Highest of Projctd/Reptd*: INAS compares the calculated and reported home value. The system uses the higher value to determine equity. *Use Reported*: INAS uses the value of the home reported on the application, to calculate equity. This is the default value. *Use Projected*: If the home projected value is outside of the Home Tolerance setting, the system calculates the value of the home based on the purchase price of the home and the date on which it was purchased, using the Federal Housing Multiplier table.
Home Tolerance	Enter a home tolerance value. INAS uses the reported value of the home, unless it exceeds the tolerance when the difference is compared to the calculated home value. If it exceeds the tolerance, the value is adjusted accordingly.
Home Cap	Enter a multiplier if you do not want the reported value or the computed value to exceed a certain multiple of the family's income. The system multiplies this value with total income to adjust the value of the home.
Home Equity Cap	Enter a cap factor from 0.0 to 9.9. Home equity is then capped using the factor times the computed income.

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Asset Assessment Rate

Field or Control	Description
Asset % Dep (asset percentage dependent)	Enter a value to use as an allowance against assets.
Asset % Ind No Dep-Married (asset percentage independent no dependents married)	Enter a value to use as an allowance against assets.
Asset % Ind No Dep-Single (asset percentage independent no dependents single)	Enter a value to use as an allowance against assets.
Asset % Parent (asset percentage parent)	Enter a value to use as an allowance against assets. Leave this field and the **Asset % Ind W/Dep** field blank to invoke standard IM rules.
Asset % Ind W/Dep (asset percentage independent with dependents)	Enter a value to use as an allowance against assets.

Defining Minimum Parental Contribution (2023-2024 and Prior Aid Years Only)

Use this page to define minimum parent contribution.

> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the Minimum PC Range page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Minimum PC Range**).

Select an **Option Rule Set** and enter the minimum institutional parent contribution values set by your institution. The system uses these values to determine whether the calculated or minimum contribution is used.

Field or Control	Description
MINIMUM PC BASED ON INCOME RANGE (minimum parental contribution based on income range)	Enter the values set by your institution's policy.

Defining Budget Options (2023-2024 and Prior Aid Years Only)

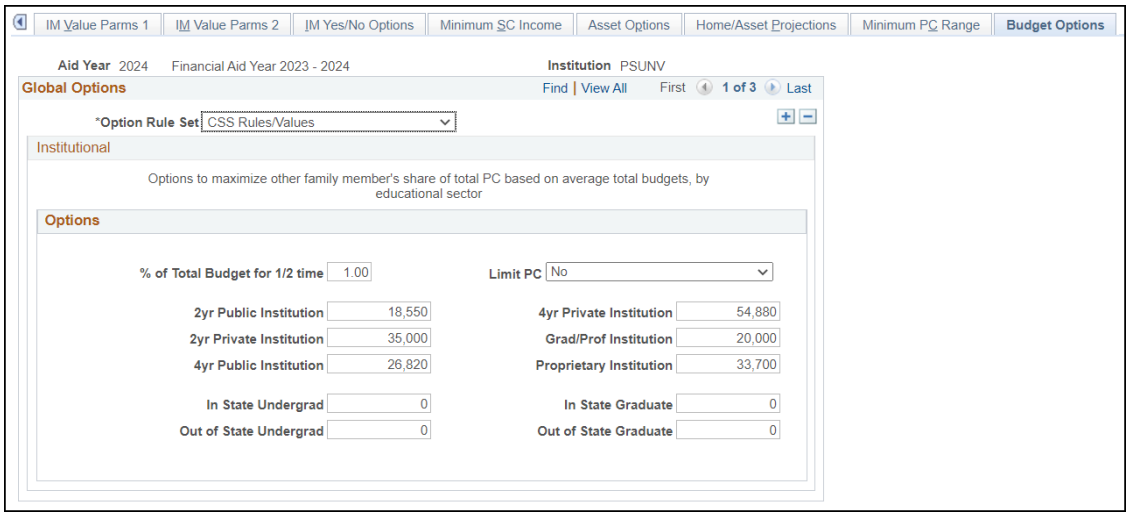
Use this page to define budget (cost of attendance) options.

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> **Note**
>
> This setup is only used for 2023-2024 and prior Aid Years. For 2024-2025 and future Aid Years, this setup is done on the College Board's Need Analysis Options (NAO) website.

Access the Budget Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Budget Options**).

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



Institutional

Field or Control	Description
% of Total Budget for 1/2 time (percentage of total budget for half-time)	Enter a percentage of the total budget that you want to use for a student attending an institution half-time. **Note:** The value *1.00* is equal to 100 percent.

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Field or Control	Description
Limit PC (limit parental contribution)	Select a parental contribution limit. Values are: *No:* Select for no parental contribution limit. *Yes; % Total Budget* (yes; percentage of total budget): Select to have the parental contribution limited to the student's cost of attendance budget divided by the total of the cost of attendance budgets of all children in the family attending college. *Yes; Highest PC from Sum and %* (yes; highest parental contribution from sum and percentage) Select to compare the parental contribution limits set by *Yes; % Total Budget* (yes; percentage of total budget) and *Yes; Sum of Budget:* and set the limit to the higher value. *Yes; Sum of Budget:* Limit the parental contribution to the sum of the cost of attendance budgets for all other children in the family; not including the student. Enter the values that your institution set for each type of institution.

Using FM and IM Extensions to Override Options

This topic reviews overriding global policy options. Federal Methodology (FM) and Institutional Methodology (IM) extensions can be accessed from ISIR corrections, simulation, or the Maintain Institutional Application component. This section discusses how to:

- Override federal extension options.
- Override INAS institutional extension options 1.
- Override INAS institutional extension options 2.
- Override INAS institutional extension options 3.
- Override INAS institutional extension options 4.
- Override INAS institutional extension options 5.

See Making ISIR Corrections for 2022-2023 and 2023-2024.

Important

You must first establish an Option Rule Set before selecting override options.

Pages Used to Override Options in ISIR Corrections

Note

The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

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Page Name	Definition Name	Navigation	Usage
FAFSA Student Information	ISIR_PIA_CS1_nn	**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Student Information**	Correct information on the FAFSA Student Information page.
FAFSA Parent Information	ISIR_PIA_CS4_nn	**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Parent Information**	Correct information on the FAFSA Parent Information page.
Federal Extension	INAS_FED_EXTnn_SEC	Click the **FM** link on any tab in the Correct 20nn-20nn ISIR records component.	Override global policy options.
Federal Extension Budget Durations	INAS_FEDEX_DUR_SEC	Click the **Budget Durations** link on the Federal Extension page.	Override global policy options for federal academic and non-standard budget duration. **Note:** This page is only used for 2023-2024 and prior Aid Years.
Federal Extension EFC Proration Options	INAS_FEDEX_PRO_SEC	Click the **EFC Proration Options** link on the Federal Extension page.	Override EFC proration options for academic and non-standard months. **Note:** This page is only used for 2023-2024 and prior Aid Years.
Federal Extension EFC Override	INAS_FEDEX_EFC_SEC	Click the **Override Federal EFC** link on the Federal Extension page.	Override EFC components for academic and non-standard award periods. **Note:** This page is only used for 2023-2024 and prior Aid Years.
INAS Institutional Extension 1	INAS_PROF_EXT1_Snn	Click the **IM** link on any tab in the Correct 20nn-20nn ISIR records component.	Override global policy options.
Institutional Budget Durations	INAS_PRFEX_DUR_SEC	Click the **Budget Durations** link or the **Override Institutional EFC** link on the INAS Institutional Extension 1 page.	Override global policy options for institutional academic and non-standard budget duration.

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Page Name	Definition Name	Navigation	Usage
Institutional EFC Override	INAS_PROF_EFC_SEC	Click the **Override Institutional EFC** link on the INAS Institutional Extension 1 page.	Override EFC components for academic and non-standard award periods.
INAS Institutional Extension 2	INAS_PROF_EXT2_Snn	Click the **IM Extension 2** link on the INAS Institutional Extension 1 page.	Override global policy options.
INAS Institutional Extension 3	INAS_PROF_EXT3_SEC	Click the **Extension 3** link on the INAS Institutional Extension 1 page.	Override global policy options.
INAS Institutional Extension 4	INAS_PROF_EXT4_Snn	Click the **Extension 4** link on the INAS Institutional Extension 1 page.	Override global policy options.
INAS Institutional Extension 5	INAS_PROF_EXT5_SEC	Click the **Extension 5** link on the INAS Institutional Extension 1 page.	Override global policy options.
Monthly EFC	NEED_SMRY_EFC_SEC	Click the **Monthly EFC** link on the ISIR Corrections EFC/DB Matches page.	View the monthly breakdown of the expected family contributions for months 1–8 and 10–12. The 9–month EFC displays on the EFC\DB Matches\Corr page. **Note:** This page is only used for 2023-2024 and prior Aid Years.

Overriding Federal Methodology Need Analysis Calculator (FM NAC) Federal Extension Options

Access the Federal Extension page (click the **FM** link on any tab of the Correct 20nn-20nn ISIR records component).

Federal Extension

Field or Control	Description
Option Rule Set	Select a rule set.
Calc Type (INAS calculation type)	Select a calculation type: • **Both FM & IM** • **Federal Methodology** • **Institutional Methodology**

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Field or Control	Description
Data Source	Select a data source: • **Both Federal & Institutional** • **Federal Data** • **Institutional Data**
Dependency Override	Select a data source: • **Independent - Prof Judgement** (individual professional judgement) • **No - Suppress**
Budget Durations	Click this link to access the **Federal Extension Budget Durations** page. You can enter any value for FM academic and/or non-standard budget duration. Federal rules allow whole numbers only for budget duration. If the total allocation for the budget duration is greater than 12 months, a 9–month EFC is calculated and used in the academic award period, and no EFC is calculated for the non-standard award period. This field can be populated using Population Update as long as the records being updated are aid year activated for the intended aid year. **Note:** This page is only used for 2023-2024 and prior Aid Years.
Override Federal EFC	See Overriding the Expected Family Contribution. **Note:** This page is only used for 2023-2024 and prior Aid Years.

Professional Judgment

Field or Control	Description
Calculate Federal Tax	Select to calculate federal tax as defined by the Federal Methodology Need Analysis Calculator (NAC) for the student and/or parent.
Calc PC for Independent (calculate parent contribution for independent)	Select to calculate a parental contribution for independent students if parental data is available. The parental contribution is calculated but not added to the EFC.

Assumption Overrides

> **Note**
>
> This is applicable for the 2023-2024 and prior Aid Years only.

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Field or Control	Description
Number in College	Select one of the following: *Override Asmptns - Use ISIR NIC* (override assumptions — use ISIR number in college) to override the number in college assumption when calculating the parent contribution. *Don't Override Asmptns* (don't override assumptions) to accept the number in college assumption when calculating the parent contribution. **Note: Number in College** override is only applicable to the 2023-2024 and prior Aid Years.

Overriding INAS Institutional Extension Options 1

Access the INAS Institutional Extension 1 page (click the **IM** link on any tab of the Correct 20nn-20nn ISIR records component).

Use the INAS Institutional Extension 1 page to set your basic overrides. From this page, access other extension pages, budget duration or EFC overrides.

Field or Control	Description
Option Rule Set	Select an **Option Rule Set** to determine which global policy option rule to use as a base.
Application Source	The **Application Source** is **Profile**.
Budget Durations	Click this link to access the **Institutional Budget Durations** page. You can enter any value for IM academic and/or non-standard budget duration. Institutional rules allow whole numbers with one decimal place. This field can be populated using Population Update as long as the records being updated are aid year activated for the intended aid year.
Override Institutional EFC	Click this link to access the **Override Institutional EFC** page, where you can override the institutional EFC amount.
Alt Min SC from Income Calc (alternate minimum student contribution from income calculation)	Select this check box to override the **Alt Min SCI** option set for the student on the IM Yes/No Options page.
Calc PC For Independent (calculate parental contribution for independent)	Select this check box to override the **Calc PC For Independent** option set for the student on the IM Yes/No Options page.
Skip Family Member Exclusion	Select to override the **Rstrct # Household - Max Age** and **Rstrct # in College - Max Age** options set on the IM Tax/Assess & Parms options page.
Allow Business/Farm Losses	Select to override the **Allow Parent Bus/Farm Loss** option set on the IM Yes/No Options page.
Allow Other Losses	Select to override the **Allow Parent Other Loss** option set on the IM Yes/No Options page.

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Field or Control	Description
Country Coefficient TCA (country coefficient total contribution from assets)	**Note:** This is applicable for the 2023-2024 and prior Aid Years only. Select to calculate an optional contribution from assets by applying the country coefficient to the percentage used to calculate the step increment • *Selected* Calculate contribution from assets applying the country coefficient to the step increment percentage. • *Unselected* Calculate contribution from assets for international student using default step increase percentage. **Note:** This is a local-only option applicable to international (non-domestic) students only.
Limit International IPA/MMA (limit international student's parental income protection allowance)	Select to limit an international student's Parental Income Protection Allowance (IPA)/MMA to an amount greater than or equal to 25% of the parental income. • *Selected* Limit non-US student's Parental IPA/MMA to an amount not less than 25% of parents' income and not greater than an equivalent domestic IPA value; regardless of the parent country coefficient value. • *Unselected* Do not limit student's Parental IPA/MMA amount, normal processing.
Apply Intl Asset Prot Allowance (apply international asset protection allowance)	Select to apply an international asset protection allowance based on the country coefficient value.
Select Expanded Available Income Table	Select: • Use Expanded AI Table (use expanded available income table) • Use Legacy SI Table (use legacy available income table).
Use Anticipated Year Income	Select to override the **Use Anticipated Year Income** option set on the IM Yes/No Options page.
Can Student IM Be Less Than FM	Select to override the **IM < FM** option set on the IM Yes/No Options page. **Note:** This option doesn't use the FM SAI/EFC value. It only uses EFM value calculated by the College Board.
Add Stu Hope/LTL to Rptd Taxes (add student hope/life time learning to reported taxes)	Select to override the **Add Hope/LTL** option set on the IM Yes/No Options page.
Allow All Income Exclusions	Select to allow all income inclusions.
Use Par Tax Table For Indeps (use parent tax table for independent students)	Select to override the **Ind Use Par St Tax Alwnc** (independent use parent state tax allowance) option set on the IM Yes/No Options page.

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Field or Control	Description
Student **Disable Global Home Value Cap**	Select to turn off the global home value cap.
Student **Disable Global Home Equity Cap**	Select to turn off the global home equity cap.
Use Which Student AGI/Income	Select: • Use Anticipated Year Income • Use Base Year Income
Exclude FSA for Health Care (exclude Flexible Spending Account for Health Care)	**Note:** This is applicable for the 2023-2024 and prior Aid Years only. Select to exclude Flexible Spending Account for Health Care funds from total untaxed income.
Exclude FSA for Dependent Care (exclude Flexible Spending Account for dependent Care)	**Note:** This is applicable for the 2023-2024 and prior Aid Years only. Select to exclude Flexible Spending Account for Dependent Care funds from total untaxed income.
Exclude HSA for PreTax Contrib (exclude Health Savings Account for pre-taxed contributions)	**Note:** This is applicable for the 2023-2024 and prior Aid Years only. Select to exclude Health Saving Account funds from total untaxed income.
Include HSA for Pre-Tax Contrib (include Health Savings Account for pre-taxed contributions)	**Note:** This is applicable for the 2024-2025 and futue Aid Years only. Select to include Health Saving Account funds from total untaxed income.
Parent **Disable Global Home Value Cap**	Select to turn off the global home value cap.
Parent **Disable Global Home Equity Cap**	Select to turn off the global home equity cap.
Use Which Parent AGI/Income	Select: • Use Anticipated Year Income • Use Base Year Income

See Maintaining Institutional Financial Aid Applications.

See the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas) for supporting documentation, including the IM tables and worksheets..

Overriding INAS Institutional Extension Options 2

Access the INAS Institutional Extension 2 page (click the **IM Extension 2** link on the INAS Institutional Extension 1 page).

Use the INAS Institutional Extension 2 page to override options used to determine the student's total budget.

Field or Control	Description
Use Which EFC (use which estimated family contribution)	Select a value to determine the institutional EFC displayed on the Need Summary page and used in the Award Entry component. Your selection overrides the value selected on the Global and Federal Options page.

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Field or Control	Description
Dependency Override	Select either *Ind Prof J* (individual professional judgement) or *No* (no override). INAS calculates a dependent student as independent when Ind Prof J is selected.
Limit Share of PC (limit share of parental contribution)	Select a parental contribution limit. Values are: *Highest:* Select to compare the parental contribution limits set by *Ratio Bdgt*(ratio budget) and *Sum Bdgt*(sum budget) and set the limit to the higher value. *No:* Select for no parental contribution limit. *Ratio Bdgt* (ratio budget): Select to have the parental contribution limited to the student's cost of attendance budget divided by the total of the cost of attendance budgets of all children in the family attending college. *Sum Bdgt* (sum budget): Limit the parental contribution to the sum of the cost of attendance budgets for all other children in the family; not including the student. Your selection overrides the value selected on the Minimum PC Range page and the Budget Options page.
Federal Tax Used	Select to override the value selected for the **Fed Tax Allwnc Against Income** field on the IM Tax/Assess & Parms page.
Project Home Value	Select: **Use Highest of Projctd/Reprtd** if above tolerance. **Use Projected** if outside tolerance **Use Reported**. to override the value on the Home/Asset Projections page.
Project Assets	Select: **Do not use projected.** **Use projected** to override the value on the Asset Options page.
Student Assets as Family Assets (student assets as family assets)	Select a value to override the value selected for the **Studnt Assets as Family Assets** field on the IM Tax/Assess & Parms page.

Overriding INAS Institutional Extension Options 3

Access the INAS Institutional Extension 3 page (click the **Extension 3** link on the INAS Institutional Extension 1 page).

Use the INAS Institutional Extension 3 page to override EFC global policy options for the given income, tax, and allowances.

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Field or Control	Description
Student/Parent AGI (student/parent adjusted gross income)	Enter an amount to override the student or parent adjusted gross income.
Student/Parent Untaxed Income	Enter an amount to override the student or parent untaxed income.
Student/Parent Tax Paid	Enter an amount to override the value used in the **Fed Tax Allwnc Against Income** (federal tax allowance against income) on the IM Tax/ Assess & Parms page.
Student/Parent Anticipated Tax	Enter an amount to override the anticipated tax calculated by the IM method.

Allowances

Field or Control	Description
Student/Parent Med/Dental Allowance (student/parent medical/dental allowance)	Enter an amount to override the **% Unreimbursed Med/Dent Expense** (percent unreimbursed medical/dental expense) on the IM Value Parms 1 page.
Student/Parent FICA/Payroll Tax (student/ parent Federal Insurance Contributions Act/ Payroll Tax)	Enter an amount to override the allowance calculated by IM.
Student/Parent Income Allowance	Enter an amount to override allowance against income calculated by IM.
Parent Tuition Allowance	Enter an amount to override the **Max Tuition Allowance** (maximum tuition allowance) per child on the IM Value Parms 1 page.
Parent IPA (parent income protection allowance)	Enter an amount to override the **Adjust IPA/MMA Regional COL** calculated based on options set on the IM Tax/Assess & Parms page.
Student/Parent COLA Index (student /parent cost of living allowance index)	Enter an amount to override the **Adjust IPA/MMA Regional COL** (Income Protection Allowance/Monthly Maintenance Allowance Regional Cost of Living) value based on options set on the IM Tax/Assess & Parms page.
Parent Tuition Allowance	Enter an amount to override the Maximum Tuition Allowance Per Child value based on the options set on the IM Values Parms 1 page.

Overriding INAS Institutional Extension Options 4

Access the INAS Institutional Extension 4 page (click the **Extension 4** link on the INAS Institutional Extension 1 page).

Use the INAS Institutional Extension 4 page to override global policy options.

Field or Control	Description
Local Tax — Percent	Enter an amount to override the amount calculated by IM.

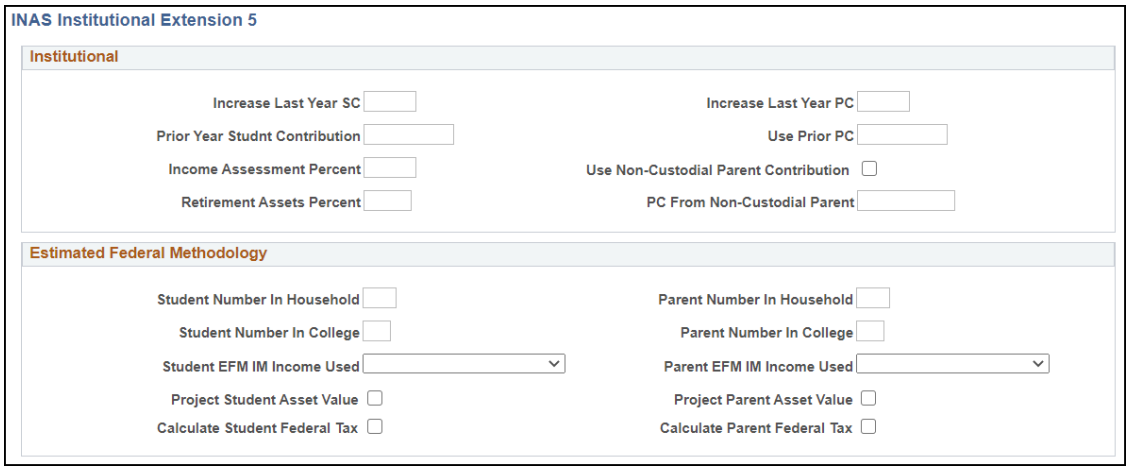
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Field or Control	Description
Cap Housing Value	Enter an amount to override the value selected for the **Home Cap** field on the Home/Asset Projections page.
Home Equity Cap Factor	Enter an amount to override the value selected for the **Home Equity Cap Factor** field on the Home/Asset Projections page.
Housing Multiplier	Enter an amount to override the delivered housing multiplier table value that projects home equity.
Asset Assessment Percent	Enter an amount to override the value selected for the **Asset Assessment Rate** field on the Home/Asset Projections page
Local Tax	Enter an amount to override amount calculated by IM.
Other Asset	Enter an amount to add to calculated assets.
Minimum Asset	Enter an amount to override Minimum Contribution from Asset on the IM Value Parms 1 page.
Asset Allowance	Enter an amount to offset discretionary net worth calculated by IM.
Minimum Income	Enter an amount to override the Minimum SC or PC values from the Minimum SC Income and Minimum PC Range pages.
Number in College	Enter a number to override the number of students in college.
Parent Number in College	Enter an amount to allow parents in college.

Overriding INAS Institutional Extension Options 5

Access the INAS Institutional Extension 5 page (click the **Extension 5** link on the INAS Institutional Extension 1 page).

This example illustrates the fields and controls on the INAS Institutional Extension 5 page. You can find definitions for the fields and controls later on this page.



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Use the INAS Institutional Extension 5 page to override EFC global policy options for family factors such as past contributions.

Institutional

Field or Control	Description
Increase Last Year SC/PC (increase last year student contribution/parent contribution)	Enter an amount to override increase last year SC or PC on the IM Value Parms 1 page.
Prior Year Studnt Contribution (prior year student contribution) and **Use Prior PC** (use prior parent contribution)	Enter the prior year's contribution for use with the **Increase Last Year SC/PC** option.
Income Assessment Percent	Enter an amount to override **Use 70% Income Assmnt for Ind** or **Income Assmnt Rate for Dep** from the IM Tax/Assess & Parms page.
Retirement Assets Percent	Enter an amount to override the value in the **% Of Stdnt IRA Include In NW** field from the IM Value Parms 1 page.
Use Non-Custodial Parent Contribution	Select to override the value entered on **Add Non Cust PC to PC** on the IM Yes/No Options page. Enter a value in the accompanying field **PC from Non-custodial Parent** if you want to override and use an amount other than the self reported value.

Estimated Federal Methodology

Field or Control	Description
Student/Parent Number In Household	Enter an amount to override amount calculated by EFM.
Student/Parent Number In College	Enter an amount to override amount calculated by EFM.
Student/Parent EFM IM Income Used	Select: • **Use IM Anticipated Income** • **Use IM Income** (This is: base behavior and turns off the global option • Use IM Income Overrides • Use IM Reported Income
Project Student/Parent Asset Value	**Note:** This applicable only to the 2023-2024 and prior Aid Years. Select to project asset values (cash using interest, investments using dividends) in EFM. **Note:** Selecting this option requires that the parameters are set on the global Asset Options page.
Calculate Student/Parent Federal Tax	Select to force the calculation of US taxes in EFM when using IM income.

Overriding the Expected Family Contribution

The system displays the override at the parent and student contribution level. Overriding the Expected Family Contribution is the same for both Federal Methodology and Institutional Methodology.

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This section discusses how to:

- Use the Federal EFC override function.
- Use the Institutional EFC override function.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC. Overriding of the Student Aid Index (SAI) is not supported.

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Pages Used to Override and View EFC

Page Name	Definition Name	Navigation	Usage
EFC Override	INAS_FEDEX_EFC_SEC	• **Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**. Click the **FM** link on any tab to open **Federal Extension** page. Click the **Override Federal EFC** link. • **Financial Aid**, and then **Institutional Application 20nn-20nn**, and then **Maintain Application 20nn–20nn**. Click the **FM** link on any tab to open **Federal Extension** page. Click the **Override Federal EFC** link. • **Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**. Click the **FM** link on the **Student Income/Assets**, **Student Information**, **Parent Income/ Assets**, **Parent Information**, or **Overrides** tabs to open the **Federal Extension** page. Click the **Override Federal EFC** link.	Override EFC components for academic and non-standard award periods. **Note:** This page is only used for aid years 2023-2024 and prior.

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Page Name	Definition Name	Navigation	Usage
Institutional EFC Override	INAS_PROF_EFC_SEC	• **Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**. Click the **IM** link on any tab to open the **INAS Institutional Extension 1** page. Click the **Override Institutional EFC** link. • **Financial Aid**, and then **Institutional Application 20nn-20nn**, and then **Maintain Application 20nn–20nn**. Click the **IM** link on any tab to open **INAS Institutional Extension 1** page. Click the **Override Institutional EFC** link.	Override EFC components for academic and non-standard award periods

Using the Federal EFC Override Function

You can override elements of the Federal EFC calculation for 2023-2024 and prior Aid Years.

Access the Federal Extension EFC Override page:

- **Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**. Click the **FM** link on any tab to open **Federal Extension** page. Click the **Override Federal EFC** link.
- **Financial Aid**, and then **Institutional Application 20nn-20nn**, and then **Maintain Application 20nn–20nn**. Click the **FM** link on any tab to open **Federal Extension** page. Click the **Override Federal EFC** link.
- **Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**. Click the **FM** link on the **Student Income/Assets**, **Student Information**, **Parent Income/Assets**, **Parent Information**, or **Overrides** tabs to open the **Federal Extension** page. Click the **Override Federal EFC** link.

Enter the actual positive value for the parent contribution and/or student contribution for each award period.

The system displays an override indicator when you override the student contribution, the parent contribution or both. It appears as an O next to the affected contributions.

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Field or Control	Description
Use EFC Override Values	Select this check box and call the FM NAC for the system to use your override values. If you want to use actual calculated values, clear the check box and call the FM NAC.
Defaults	Click the **Defaults** button to reset the student contribution and parent contribution to current values from STD_AWD_PER. If you have already calculated a FM EFC using overridden values, those same values are returned when you click the **Defaults** button. To retrieve calculated values as the default, clear the **Use EFC Override Values** check box, call the FM NAC, return to this page, and click the **Defaults** button.

> **Note**
>
> For the 2023-2024 and prior Aid Years, ensure that the budget duration set in global policy options or at the extension level supports the EFC overrides being established for the award period. Warning messages appear if you create overrides for an award period that is not supported by the budget duration.

Using the Institutional EFC Override Function

You can override components of the Institutional EFC calculation.

Use this page to override the academic or non-standard parent contribution or student contribution.

Access the Institutional EFC Override page:

- **Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**. Click the **IM** link on any tab to open the **INAS Institutional Extension 1** page. Click the **Override Institutional EFC** link.
- **Financial Aid**, and then **Institutional Application 20nn-20nn**, and then **Maintain Application 20nn–20nn**. Click the **IM** link on any tab to open **INAS Institutional Extension 1** page. Click the **Override Institutional EFC** link.

Field or Control	Description
Use EFC Override Values	Select this check box and call INAS for the system to use your override values. If you want to use actual calculated values, clear the check box and call INAS.

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> **Note**
>
> You must select an **Option Rule Set** before setting the budget duration and overriding the EFC. When creating an extension record, you must always select an **Option Rule Set**. Failing to do so affects your expected results.

Using Estimated FM Values

The Financial Aid system stores the Estimated Federal Methodology (EFM) calculation using institutional application data for awarding federal funds when only institutional (Profile) data is available.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC.

The system stores and displays the EFM calculation only when no Institutional Student Information Record (ISIR) exists for the student. As soon as you load an ISIR for the student and call the Federal Methodology Need Analysis Calculator (FM NAC), the EFM calculation is replaced by the SAI/EFC from the ISIR.

> **Note**
>
> The system does not consider the status of the ISIR before replacing the EFM calculation it replaces the estimated values with the SAI/EFC value from the ISIR after the FM NAC is called.

When in use, the EFM calculation populates all FM SAI/EFC fields on all pages in the system. The system doesn't display any visual cue to indicate that the value is an estimate. You need to know whether a student has an ISIR loaded to determine whether the value that appears is an EFM calculation or an actual FM SAI/EFC.

Using FM Simulation

You can simulate different Federal Methodology (FM) need analysis scenarios before submitting ISIR Corrections. The FM Simulation process retrieves information from the ISIR Correction pages and Federal Extension page. You can create or change existing federal extension data or global policy option data in simulation depending on your processing requirements.

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> **Note**
>
> This topic relates to using FM Simulation for the 2024-2025 and future Aid Years. For information about FM Simulation for the 2022-2023 and 2023-2024 Aid Years see Using FM Simulation for the 2023-2024 and 2022-2023 Aid Years.

This section provides an overview of the steps for the simulation process and discusses how to:

- Work with student income and assets.
- Override global policy options at the student level.
- Work with student information.
- Work with parent income and assets.
- Work with parent information.
- Work with assumption overrides.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC.

Understanding the Steps for FM Simulation

Use the FM Simulation process to select records with an ISIR to simulate SAI/EFC calculations. Then commit changes to ISIR tables when complete.

1. Click the **Get Federal Data** button on the page you are using to populate the FM Simulation tables with the latest ISIR information. This is important because data from a prior session might remain in the table.
2. Modify fields to affect the SAI/EFC calculation, invoke overrides, or both.

   You can also override global policy options at the student level, by clicking the **Fed Ext** button from any page in this component. Unless an extension record already exists in ISIR, the default values that you defined in the Local Global Options page display on the Federal Extension page when you select a Rule Set.
3. When you complete your changes, click the **Calc NAC** (calculate need analysis calculation) button. The system displays the results of the SAI/EFC after a successful completion of FM Simulation.
4. Repeat steps 2 and 3 as needed. To refresh the worksheet, repeat Step 1.
5. Click the **Use Simulated Data** button to use the calculated data for need analysis.

   If you confirm that you want to perform the operation, the system inserts a new row in all of the ISIR Tables and any field that was changed is processed as follows:

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a. Sent to the Audit Table for history.
b. Included in the ISIR Correction process.
c. Used to recalculate need.

> **Note**
>
> You cannot apply changes to any student whose ISIR is rejected.

Pages Used for FM Simulation

> **Note**
>
> The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Page Name	Definition Name	Navigation	Usage
Student Information	INAS_SIM_CS1	**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **Student Information**	View or update fields from ISIR Corrections to perform an SAI calculation with the FM NAC.
Spouse Information	INAS_SIM_CS2	**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **Spouse Information**	View or update fields from ISIR Corrections to perform an SAI calculation with the FM NAC.
Simulation Federal Extension	INAS_SIM_FEDEX_Snn	Click the **FM** link on the Student Income/ Assets page.	Override the global policy options at the student level.
Parent Information	INAS_SIM_CS3	**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **Parent Information**	View or update fields from ISIR Corrections to perform an SAI calculation with the FM NAC.
Parent Spouse/Partner	INAS_SIM_CS4	**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **Parent Spouse/ Partner**	View or update fields from ISIR Corrections to perform an SAI calculation with the FM NAC.

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Page Name	Definition Name	Navigation	Usage
Transaction Detail	INAS_SIM_CS5	**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **Transaction Detail**	View or update fields from ISIR Corrections to perform an SAI calculation with the FM NAC. Set **Dependency Override** and **Correction Status.**
SAI and Flags	INAS_SIM_CS6	**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **SAI and Flags**	View SAI calculation results.

Common Page Elements for the FM Simulation Component

These common elements appear on the FM Simulation pages:

Field or Control	Description
Get Federal Data	Click this button to copy the student's latest ISIR data from the Federal Extension record to this page.
Calc SAI (calculate student aid index)	Click this button to invoke a Remote Function Call of the FM NAC.
Use Simulated Data	Click this button to move the simulated data into production.
Federal Extension	Click this link to access the Simulation **Federal Extension** page and make changes to an existing extension or override the Global Policy Options at the student level.
Need Summary	Click this link to view a student's need summary. Need summary information reflects only current values. New data that you have calculated is not reflected on Need Summary pages until you click the **Use Simulated Data** button.
SAI	Displays the 9-month SAI/EFC. When you click the **Get Fed Data** button, the system populates the ISIR Primary SAI on record and updates the Primary SAI when the FM NAC is called.

Working with Student, Student Spouse, Parent, and Parent Spouse/Partner Information

Access the Student Income/Assets page (**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **Student Information or Student Spouse or Parent Information or Parent Spouse/Partner**).

ISIR edits are not used in the simulation pages. Changes used shouldn't conflict with data in ISIR corrections.

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Field or Control	Description
Grade Level	Select from: *First Year* *Graduate or Professional* *Other Undergraduate* *Second Year*

Field Name Abbreviations and Explanations

SNAP (Supplemental Nutrition Assistance Program)

SSI (Supplemental Security Income)

TANF (Temporary Assistance for Needy Families)

WIC (Women, Infants and Children)

Overriding Global Policy Options

Access the Simulation Federal Extension page (click the **FM** link on the Student Income/Assets page).

Working with Overrides in Transaction Details

Access the Overrides page (**Financial Aid**, and then **Federal Application Data**, and then **Simulate FM**, and then **Transaction Details**).

Transaction Indicators

Field or Control	Description
Dependency Override Indicator	Values include: • Dependent to Independent • Failed Dependency Override • No FAA Override • Override Cancelled
CFH Indicator (child of fallen heroes indicator)	Values include: • Eligible Due to Grandfathering • Eligible for CFH • No Determination • Not Eligible for CFH
Incarcerated Applicant Flag	Values include: • Corr Facility Address File • Incarcerated App Flag Removed • Incarcerated App Flag Set • Incarcerated P.O. Box
Professional Judgment	Values include: • No SAI Adjustment Requested • SAI Adjustment Failed • SAI Adjustment Processed

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Field or Control	Description
IASG Indicator (Iraq Afghanistan student grant indicator)	Values include: • Eligible for IASG • Grandfathered for IASG • No Determination • Not Eligible for IASG

Using FM Simulation for the 2023-2024 and 2022-2023 Aid Years

You can simulate different Federal Methodology (FM) need analysis scenarios before submitting ISIR Corrections. The FM Simulation process retrieves information from the ISIR Correction pages and Federal Extension page. You can create or change existing federal extension data or global policy option data in simulation depending on your processing requirements.

This section provides an overview of the steps for the simulation process and discusses how to:

- Work with student income and assets.
- Override global policy options at the student level.
- Work with student information.
- Work with parent income and assets.
- Work with parent information.
- Work with assumption overrides.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC.

Understanding the Steps for FM Simulation

Use the FM Simulation process to select records with an ISIR to simulate SAI/EFC calculations. Then commit changes to ISIR tables when complete.

1. Click the **Get Federal Data** button on the page you are using to populate the FM Simulation tables with the latest ISIR information. This is important because data from a prior session might remain in the table.
2. Modify fields to affect the SAI/EFC calculation, invoke overrides, or both.

   You can also override global policy options at the student level, by clicking the **Fed Ext** button from any page in this component. Unless an extension record already exists in ISIR, the default values that you defined in the Local Global Options page display on the Federal Extension page when you select a Rule Set.

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3. When you complete your changes, click the **Calc NAC** (calculate need analysis calculation) button. The system displays the results of the SAI/EFC after a successful completion of FM Simulation.
4. Repeat steps 2 and 3 as needed. To refresh the worksheet, repeat Step 1.
5. Click the **Use Simulated Data** button to use the calculated data for need analysis.

   If you confirm that you want to perform the operation, the system inserts a new row in all of the ISIR Tables and any field that was changed is processed as follows:

   a. Sent to the Audit Table for history.
   b. Included in the ISIR Correction process.
   c. Used to recalculate need.

> **Note**
>
> You cannot apply changes to any student whose ISIR is rejected.

Pages Used for FM Simulation

> **Note**
>
> The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Page Name	Definition Name	Navigation	Usage
Student Income/Assets	INAS_SIM_STU1_nn	**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Student Income/ Assets**	View or update fields from ISIR Corrections to perform an SAI/EFC calculation with the FM NAC.
Simulation Federal Extension	INAS_SIM_FEDEX_Snn	Click the **Federal Extension** link on the Student Income/Assets page.	Override the global policy options at the student level.
Simulation Budget Durations	INAS_SIMEX_DUR_SEC	Click the **Budget Durations** link on the Simulation Federal Extension page.	Override global policy options for federal academic and non-standard budget duration. **Note:** This feature is only applicable to the 2023-2024 and prior Aid Years.

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Page Name	Definition Name	Navigation	Usage
Simulation EFC Proration Options	INAS_SIMEX_PRO_SEC	Click the **EFC Proration Options** link on the Simulation Federal Extension page.	Override proration options for academic and non-standard months. **Note:** This feature is only applicable to the 2023-2024 and prior Aid Years.
Simulation EFC Override	INAS_SIMEX_EFC_SEC	Click the **EFC Override** link on the Simulation Federal Extension page.	Override SAI/EFC components for academic and non-standard award periods.
Student Information	INAS_SIM_STU2_nn	**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Student Information**	View or update fields from ISIR Corrections to perform an SAI/EFC calculation with the FM NAC.
Parent Income/Assets	INAS_SIM_PAR1_nn	**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Parent Income/ Assets**	View or update fields from ISIR Corrections to perform an SAI/EFC calculation with the FM NAC.
Parent Information	INAS_SIM_PAR2_nn	**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Parent Information**	View or update fields from ISIR Corrections to perform an SAI/EFC calculation with the FM NAC.
Overrides	INAS_SIM_OVRD_nn	**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Overrides**	View or update fields from ISIR Corrections to perform an SAI/EFC calculation with the FM. Set **Dependency Override** and **Correction Status.**

Common Page Elements for the FM Simulation Component

The following elements appear on the Student/Income Assets page, Student Information page, Parent Income/Assets page and Overrides page.

Field or Control	Description
Get Federal Data	Click this button to copy the student's latest ISIR data from the Federal Extension record to this page.

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Field or Control	Description
Calc NAC (calculate need analysis calculation)	Click this button to invoke a Remote Function Call of the FM NAC.
Use Simulated Data	Click this button to move the simulated data into production.
Federal Extension	Click this link to access the Simulation **Federal Extension** page and make changes to an existing extension or override the Global Policy Options at the student level.
Need Summary	Click this link to view a student's need summary. Need summary information reflects only current values. New data that you have calculated is not reflected on Need Summary pages until you click the **Use Simulated Data** button.
Monthly EFC	Click this link to access the Simulation Monthly EFC page to view the FM calculated monthly EFC for months 1-8 and 10-12. **Note:** This feature is only applicable to the 2023-2024 and prior Aid Years.
Formula Type	Displays the formula type used in the FM NAC calculation. When you click the **Get Federal Data** button, the system populates the ISIR formula type on record and updates the formula type when the FM NAC is called.
Primary SAI/EFC:	Displays the 9-month SAI/EFC. When you click the **Get Fed Data** button, the system populates the ISIR Primary SAI/EFC on record and updates the Primary SAI/EFC when the FM NAC is called.
Prorated SAI/EFC:	For the 2024-2025 and future Aid Years, displays the 9-month SAI. For the 2023-2024 and prior Aid Years, displays the 9-month or other than 9-month EFC. When you click the **Get Fed Data** button, the system populates the ISIR Prorated EFC on record and updates the Prorated EFC when the FM NAC is called.

Working with Student Income and Assets

Access the Student Income/Assets page (**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Student Income/Assets**).

ISIR edits are not used in the simulation pages. Changes used should not conflict with data in ISIR corrections.

Overriding Global Policy Options at the Student Level

Access the Simulation Federal Extension page (click the **Federal Extension** link on the Student Income/Assets page).

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Field or Control	Description
Budget Durations	Click this link to access the **Simulation Budget Durations** page. You can enter any value for FM budget duration. Federal rules allow whole numbers only for budget duration. If the total allocation for the budget duration is greater than 12 months, a 9–month EFC is calculated and used in the academic award period, and no EFC is calculated for the non-standard award period. **Note:** This feature is only applicable to the 2023-2024 and prior Aid Years.
EFC Proration Options	Click this link to access the **Simulation EFC Proration Options** page to determine how to prorate EFC. **Note:** This feature is only applicable to the 2023-2024 and prior Aid Years.
Override Federal SAI/EFC	Click this link to access the **Simulate Federal SAI/EFC Overrides** page to override the academic or non-standard parent contribution or student contribution.

Working with Student Information

Access the Student Information page (**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Student Information**).

Field or Control	Description
Grade Level	Select from: *1st yr Attended Before* *1st yr Grad/Prof* *1st yr Never Attended* *2nd yr Sophomore* *3rd yr Junior* *4th yr Senior* *5th yr other UG* *Continuing Grad/Prof*

Field Name Abbreviations and Explanations

SNAP (Supplemental Nutrition Assistance Program)

School Lunch (free or reduced price lunch)

Medicaid/SSI (Supplemental Security Income)

TANF (Temporary Assistance for Needy Families)

WIC (Women, Infants and Children)

Work Study

Unaccompanied Youth (School)

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Unaccompanied Youth (HUD) (Unaccompanied Youth – Housing and Urban Development)

Working with Parent Income and Assets

Access the Parent Income/Assets page (**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Parent Income/Assets**).

Working with Parent Information

Access the Parent Information page (**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Parent Information**).

Field Name Abbreviations and Explanations

SNAP (Supplemental Nutrition Assistance Program)

School Lunch (free or reduced price lunch)

Medicaid/SSI (Supplemental Security Income)

TANF (Temporary Assistance for Needy Families)

WIC (Women, Infants and Children)

Dislocated Worker

Working with Assumption Overrides

Access the Overrides page (**Financial Aid**, and then **Federal Application Data**, and then **Simulate 20nn-20nn FM**, and then **Overrides**).

STATUS OVERRIDES

Field or Control	Description
Dependency Override:	Values include: *1:* Dependent to Independent. You can select this value. *2:* Cancel Dep Override – Corr Only. You can select this value. *3:* Override Failed. The correction process sets this value. **4:** Homeless Youth Determination
Correction Status:	Values include: *1:* Correction(s) Pending. You can select this value. *2:* Send Correction(s). You can select this value. *3:* Correction(s) Sent. The correction process sets this value. *4:* Correction(s) Accepted. The correction process sets this value. *5:* Corrections Rejected. The correction process sets this value. *6:* Do Not Send Correction(s). You can select this value.

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ASSUMPTION OVERRIDES

Field or Control	Description
Parent Number In College	Select *1:*Yes.
Parent AGI (parent adjusted gross income)	Select *1:*Yes.
Parent Addl Fin Total (parent additional financial total)	Select *1:*Yes.
Student Number In college	Select *1:*Yes.
Student AGI (student adjusted gross income)	Select *1:*Yes.
Student Addl Fin Total (student additional financial total)	Select *1:*Yes.

REJECT OVERRIDES

Select *1*: Yes to override a listed reject.

Performing Mass SAI/EFC Calculations

This section discusses how to perform SAI/EFC Calculations in mass for the 2023-2024 aid year and subsequent aid years based on the policy options at your institution.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC.

Page Used for Performing Mass SAI/EFC Calculations

> **Note**
>
> Mass SAI/EFC Calculations can only be used for the 2023-2024 aid year and subsequent aid years.

Page Name	Definition Name	Navigation	Usage
Mass SAI/EFC Calculation	SFA_RUNCTL_NAC_BCH	**Financial Aid**, and then **File Management**, and then **Mass SAI/EFC Calculation**	Calculate SAI/EFCs in mass based on policy options.

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Calculating SAIs/EFCs in Mass

You can perform both Federal Methodology (FM) and Institutional Methodology (IM) need analysis calculations in mass.

This process uses the FM Need Analysis Calculator (FM NAC) for FM EFC calculations and INAS for IM EFC calculations.

With the delivery of IM each year, the **Application Type** value is limited to **Profile**. After FM is delivered, values of **Both Federal and Profile** and **Federal** are available as additional processing options.

Mass EFC Parallel Processing setup is required to be completed prior to using the Mass EFC Calculation process. See Defining Installation Level Defaults, "Mass SAI/EFC Parallel Processing Setup" for more information. .

You can run mass SAI/EFC calculations automatically after each ISIR data load or as a separate user-controlled process.

Records loaded into the INAS_CALC_RECS table are selected for processing.

Field or Control	Description
Application Type	Select the application type to run batch calculations from these options: *B:* Both Federal and Profile *F:* Federal *P:* Profile
Calculate Inst NCP (calculate institutional non custodial parent contribution)	Select this check box to calculate the non custodial parent contribution for IM. This check box is only available when Profile applications are selected for processing. **Note:** Calculate the non-custodial parent contribution before invoking the regular INAS calculation. Calculating a non custodial parent contribution creates an INAS Extension record, selects the **Use Non-Custodial Parent Contribution** check box and populates the *PC From Non-Custodial Parent* (parent contribution from non-custodial parent) field in INAS Extension 5. After this, when the regular INAS calculation is invoked, the non-custodial parent contribution is added to the Custodial Parent contribution and overall expected family contribution.
Clear Calc Requests (clear calculation requests)	If you select *Y*, the files are removed from the table after the batch calculation. You can't run batch FM NAC or INAS on these files again unless they are added to INAS_CALC_RECS by loading new ISIR files with the appropriate data load parameters or by using Population Update.
Population Selection	Select to this option to use equation engine, external file, or PS query to calculate FM SAI/EFCs or IM EFCs for a specific population.

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Using INAS Batch Calculations

This section discusses how to calculate Federal Methodology (FM) and Institutional Methodology (IM) INAS in batch for the 2022-2023 aid year and prior aid years based on the policy options at your institution.

Page Used to Make INAS Batch Calculations

> **Note**
>
> INAS Batch Calculations can only be used for the 2022-2023 and prior aid years.

Page Name	Definition Name	Navigation	Usage
Batch INAS Calculation	RUNCTL_FAPINCLC	**Financial Aid**, and then **File Management**, and then **INAS Batch Calculation**, and then **Batch INAS Calculation**	Calculate INAS in batch based on policy options.

Calculating the INAS in Batch

Access the Batch INAS Calculation page (**Financial Aid**, and then **File Management**, and then **INAS Batch Calculation**, and then **Batch INAS Calculation**).

The FAPINCLC batch calculation process is the same process as the online calculation. You can run INAS batch calculations automatically after each ISIR data load or as a separate use controlled process. Records loaded into the INAS_CALC_RECS table are selected for processing.

With the delivery of IM each year, the Application Type value is limited to Profile. After FM is delivered, values of Both Federal & Profile and Federal are available as additional processing options.

Field or Control	Description
Application Type	Select the application type to run INAS batch calculations from these options: *B:* Both Federal and Profile *F:* Federal *P:* Profile

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Field or Control	Description
Calculate Inst NCP (calculate institutional non custodial parent contribution)	Select this check box to calculate the non custodial parent contribution. **Note:** Calculate the non-custodial parent contribution before invoking the regular INAS calculation. Calculating a non custodial parent contribution creates an INAS Extension record, selects the **Use Non-Custodial Parent Contribution** check box and populates the *PC From Non-Custodial Parent* (parent contribution from non-custodial parent) field in INAS Extension 5. After this, when the regular INAS calculation is invoked, the non-custodial parent contribution is added to the Custodial Parent contribution and overall expected family contribution.
Clear Calc Requests (clear calculation requests)	If you select *Y*, the files are removed from the table after the batch calculation. You cannot run batch INAS on these files again unless they are added to INAS_CALC_RECS by loading new ISIR files with the appropriate data load parameters, or by using population update.

Viewing Federal SAI/EFC Information

This section discusses how to review Federal SAI/EFC summary information.

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC.

Pages Used to Review Federal SAI/EFC Information

> **Note**
>
> The system always makes available the three most recent Aid Year versions of the View FM SAI/EFC Detail component.

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Page Name	Definition Name	Navigation	Usage
Federal SAI/EFC Summary	ISIR_FM_SUMRY_nn	**Financial Aid**, and then **Federal Application Data**, and then **View 20nn-20nn FM SAI/EFC Detail**, and then **Federal SAI/EFC Summary**	Review information about a student's federal SAI/EFC.
ISIR Information	ISIR_INFO_SMRY_SEC	Click the **ISIR Information Summary** link on the Federal SAI/EFC Summary inquiry page.	View ISIR summary information for this student.
Assumption Detail	STDNT_FM_ASMP_SEC	Click the **Assumption Detail** link on the Federal SAI/EFC Summary inquiry page.	View a long description of any assumption the system is using in the FM NAC calculation.
Total Income Detail	ISIR_TI_SEC	Click the **Total Income** Detail link on the Federal SAI/EFC Summary inquiry page.	View total income information. Total income is the difference between taxable income, untaxed income, and adjustments to income.
Total Allowances Detail	ISIR_TA_SEC	Click the **Total Allowances** Detail link on the Federal SAI/EFC Summary inquiry page.	View allowances to income. Taxes paid, Income Protection and Employment allowances are displayed.
Available Income Detail	ISIR_AI_SEC	Click the **Available Income** Detail link on the Federal SAI/EFC Summary inquiry page.	View available income information for the student. Available income is total income less total allowances.
Total Parent Contribution Detail	ISIR_PC_SEC_nn	Click the **Total Parent Contribution** Detail link on the Federal SAI/EFC Summary inquiry page.	View total parent contribution information for this student, including **Available Income, Contribution from Assets, Adjustments to Available Income,** the **Total Parent Contribution, Number in College,** and **Calculated Parent Contribution.** This page is available only if the student is a dependent and provides parent income and asset information.

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Page Name	Definition Name	Navigation	Usage
Total Student Contribution Detail	ISIR_SC_SEC_nn	Click the **Total Student Contribution** Detail link on the Federal SAI/EFC Summary inquiry page.	View total student contribution. This page displays the **Total Student Contribution, Number in College, Student Income Contribution, Student Asset Contribution,** and **Calculated Student Contribution.**
Prorated EFC Detail	ISIR_EFC_SEC_nn	Click the **Prorated EFC** Detail link on the Federal EFC Summary inquiry page.	View information about the prorated EFC for the student. The page displays **Parent Contribution** (if applicable), **Student Income Contribution, Student Asset Contribution,** the **Prorated EFC,** and the **Calculated EFC.** The prorated EFC reflects enrollment for 9 months or other than 9 months depending on the budget duration. **Note:** This feature is only applicable to the 2023-2024 and prior Aid Years.

Reviewing Federal SAI/EFC Summary Information

Access the Federal SAI/EFC Summary page (**Financial Aid**, and then **Federal Application Data**, and then **View 20nn-20nn FM SAI/EFC Detail**, and then **Federal SAI/EFC Summary**).

From this page, select links to all detail pages for the students' SAIs/EFCs for a specified aid year. The system supports three active aid years.

For **Total Student Contribution,** *N/A* is displayed to more closely align interim calculation results for Independent Students without Dependents.

Viewing Institutional EFC Information

This section provides an overview of institutional EFC calculations and discusses how to review an institutional EFC summary.

Understanding Institutional EFC Calculations

The following methodologies are used to calculate both parent and student contributions shown on the Institutional EFC Summary page:

- Estimated federal methodology (EFM) uses the federal methodology provided by the College Board to calculate an estimated federal contribution.

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- Base Institutional Methodology (IM) uses the institutional methodology provided by the College Board.
- IM with Options uses the IM provided by the College Board and can reflect override options that you set up.

Pages Used to View Institutional EFC

> **Note**
>
> The system always makes available the three most recent Aid Year versions of the View IM EFC Detail component.

Page Name	Definition Name	Navigation	Usage
Institutional EFC Summary	INST_INAS_SMRY_nn	**Financial Aid**, and then **Institutional Application Data**, and then **View 20nn-20nn IM EFC Detail**, and then **Institutional EFC Summary**	Review information about a student's Institutional EFC (expected family contribution). From this page, access detailed information for each calculated amount.
Institutional Assumption Detail	STDNT_IM_ASMP_SEC	Click the **IM Assumptions** link on the Institutional EFC Summary Detail page.	View the institutional assumptions that apply to a student. INAS IM Assumption Codes are defined by the College Board and are delivered with the Financial Aid system. An assumption is an assumed response to a question that is left blank or to a response that was inconsistent with the guidelines.
Total Income Detail Parent Contribution IM and IM w/ Options	INST_PIM_TI_SEC_nn INST_PIM_TIO_SECnn	Click the **Total Income** Detail link on the Institutional EFC Summary Detail page.	View total income information for parents calculated using institutional methodology. Total Income is the difference between the combination of taxable income, untaxed income and adjustments to income on earned income.

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Page Name	Definition Name	Navigation	Usage
Total Income Detail Parent Contribution - EFM	INST_PFM_TI_SEC_nn	Click the **Total Income** Detail link on the Institutional EFC Summary Detail page.	View total income information for parents using estimated federal methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.
Total Income Detail Student Contribution - IM, IM w/Options	INST_SIM_TI_SEC_nn INST_SIM_TIO_SECnn	Click the **Total Income** Detail link on the Institutional EFC Summary Detail page.	View total income information for the student using institutional methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.
Total Income Detail Student Contribution – EFM	INST_SFM_TI_SEC_nn	Click the **Total Income** Detail link on the Institutional EFC Summary Detail page.	View total income information for the student using estimated federal methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.
Available Income Detail Parent Contribution – IM, IM w/Options	INST_PIM_AI_SEC_nn INST_PIM_AIO_SECnn	Click the **Available Income** Detail link on the Institutional EFC Summary Detail page.	View information about parents' contribution using institutional methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance (IPA). **Total Allowances** is the sum of these allowances. **Available Income** is the Total Income, shown on the **Total Income** page, less the **Total Allowances.**

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Page Name	Definition Name	Navigation	Usage
Available Income Detail Parent Contribution - EFM	INST_PFM_AI_SEC_nn	Click the **Available Income** Detail link on the Institutional EFC Summary Detail page.	View information about parent's contribution using estimated federal methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance (IPA). **Total Allowances** is the sum of these allowances. **Available Income** is the Total Income, shown on the **Total Income** page, less the **Total Allowances.**
Available Income Detail Student Contribution – IM, IM w/Options	INST_SIM_AI_SEC_nn INST_SIM_AIO_SECnn	Click the **Available Income** Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using your institutional methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance/monthly maintenance allowance (IPA/MMA). **Total Allowances** is the sum of these allowances. **Available Income** is the Total Income, shown on the **Total Income** page, less the **Total Allowances.**

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Page Name	Definition Name	Navigation	Usage
Available Income Detail Student EFM	INST_SFM_AI_SEC_nn	Click the **Available Income** Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using estimated federal methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance (IPA). **Total Allowances** is the sum of these allowances. **Available Income** is the Total Income, shown on the **Total Income** page, less the **Total Allowances.**
Net Worth Detail Parent Contribution IM, IM w/Options	INST_PIM_NW_SECnn INST_PIM_NWO_SEC_nn	Click the **Net Worth** Detail link for Parent Contribution, on the Institutional EFC Summary Detail page.	View detail information about the parents' net worth, the total assets calculated by IM.
Net Worth Detail Parent Contribution – EFM	INST_PFM_NW_SEC_nn	Click the **Net Worth** Detail link for Parent Contribution, on the Institutional EFC Summary Detail page.	View detail information about parent's net worth, the total assets calculated by EFM.
Net Worth Detail Student Contribution - IM, IM w/Options	INST_SIM_NW_SEC_nn INST_SIM_NWO_SECnn	Click the **Net Worth** Detail link for Student Contribution, on the Institutional EFC Summary Detail page.	View detail information about student's net worth, the total assets calculated by IM.
Net Worth Student Contribution – EFM	INST_SFM_NW_SEC_nn	Click the **Net Worth** Detail link on the Institutional EFC Summary Detail page.	View information about student's net worth, the total assets calculated by EFM.
Discretionary Net Worth Income Supplement Detail Parent Contribution - IM, IM w/Options	INST_PIM_DN_SEC_nn INST_PIM_DNO_SECnn	Click the **Discretionary Net Worth/Income Supplement** Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the parent using institutional methodology.
Discretionary Net Worth Income Supplement Detail Parent Contribution – EFM	INST_PFM_IS_SEC_nn	Click the **Discretionary Net Worth/Income Supplement** Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the parent using estimated federal methodology.

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Page Name	Definition Name	Navigation	Usage
Discretionary Net Worth Income Supplement Detail Student Contribution – IM, IM w/Options	INST_SIM_DN_SEC_nn INST_SIM_DNO_SECnn	Click the **Discretionary Net Worth/Income Supplement** Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the student using institutional methodology.
Discretionary Net Worth Income Supplement Detail Student Contribution – EFM	INST_SFM_IS_SEC_nn	Click the**Discretionary Net Worth/Income Supplement** Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the student using estimated federal methodology.
Contribution for Student Detail Parent Contribution – IM, IM w/Options	INST_PIM_TC_SEC_nn INST_PIM_TCO_SECnn	Click the **Contribution for Student** Detail link on the Institutional EFC Summary Detail page.	View information about the parent contribution for the student using institutional methodology.
Contribution for Student Detail Parent Contribution – EFM	INST_PFM_TC_SEC_nn	Click the **Contribution for Student** Detail link on the Institutional EFC Summary Detail page.	View information about the parent contribution for the student using federal methodology.
Contribution for Student Detail Student Contribution – IM, IM w/Options	INST_SIM_TC_SEC_nn INST_SIM_TCO_SECnn	Click the **Contribution for Student** Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using institutional methodology.
Contribution for Student Detail Student Contribution – EFM	INST_SFM_TC_SEC_nn	Click the **Contribution for Student** Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using estimated federal methodology.

Reviewing an Institutional EFC Summary

Access the Institutional EFC Summary page (**Financial Aid**, and then **Institutional Application Data**, and then **View 20nn-20nn IM EFC Detail**, and then **Institutional EFC Summary**).

The system displays the **Total Income, Available Income, Net Worth, DNW/Inc Supp** (Discretionary Net Worth/Income Supplement), and **Contribution for Student** for both parent and student contribution for the selected student, application source, and aid year.

Click the **IM Assumptions** link to access the Institutional Assumption Detail page, which describes any INAS assumptions that apply to the student.

Click the **Detail** links to access detailed information for each displayed amount.

See Reviewing FM NAC and INAS Assumption Codes .

Parent Contribution

EFM totals are always displayed. Select either basic IM or IM with options.

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Field or Control	Description
Base IM	Uses the institutional methodology provided by the College Board.
IM w/Options	Uses the institutional methodology provided by the College Board and reflects override options set up by your institution.
EFM (estimated federal methodology)	Uses the federal methodology formula provided by the College Board to calculate an estimated federal parent contribution.

Student Contribution

EFM totals are always displayed. Select Base IM or IM with Options.

Field or Control	Description
Base IM	Uses the institutional methodology provided by the College Board.
IM w/Options	Uses the institutional methodology provided by the College Board and reflects override options set up by your institution.
EFM (estimated federal methodology)	Uses the federal methodology formula provided by the College Board to calculate an estimated federal student contribution.

Reviewing Need Summary

This section discusses how to view need summary information.

Pages to View Need Summary

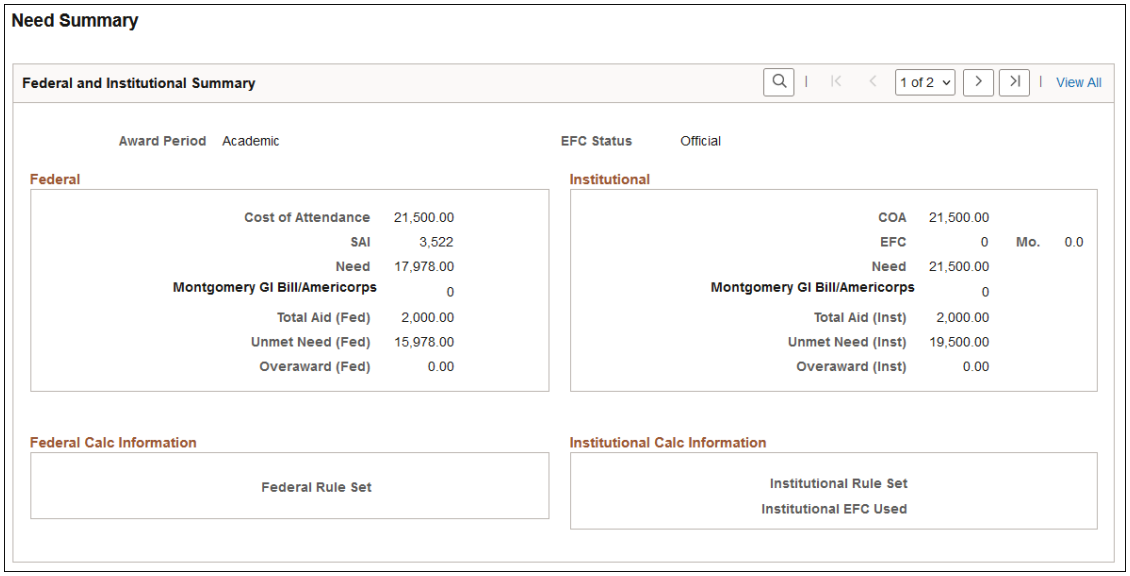
Page Name	Definition Name	Navigation	Usage
Need Summary	NEED_SUMMARY_SEC	Click the **Need Summary** link on any tab of the Correct ISIR records component.	View the award period and SAI/EFC status for both the Federal and Institutional cost of attendance, expected family contribution, need, GI bill, total aid, unmet need, and aid overaward.

Viewing Need Summary Information

Access the Need Summary page (click the **Need Summary** link on any tab of the Correct ISIR records component.

This example illustrates the fields and controls on the Need Summary page.

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Reviewing FM NAC and INAS Assumption Codes

To set up Federal Methodology Need Analysis Calculator (FM NAC) and INAS Assumptions Codes, use the Assumption Codes component (INAS_ASMPTN_CODES).

This section discusses how to:

- Review FM NAC assumption codes.
- Review INAS IM assumption codes.

> **Note**
>
> This feature is only applicable to the 2023-2024 and prior Aid Years.

Pages Used to Review the FM NAC and INAS Assumption Codes

Page Name	Definition Name	Navigation	Usage
FM Assumption Codes	INAS_FM_ASMPTN	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **EFC Assumption Codes**, and then **FM Assumption Codes**	Review assumption codes regarding federal application information. FM assumption codes are provided by the U. S. Department of Education, based on the CPS/FPS and delivered with the Financial Aid system.

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Page Name	Definition Name	Navigation	Usage
INAS IM Assumption Codes	INAS_IM_ASMPTN	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **EFC Assumption Codes**, and then **INAS IM Assumption Codes**	Review assumption codes regarding institutional application information. INAS IM assumption codes are provided by the College Board and are delivered with the Financial Aid system.

Reviewing FM NAC Assumption Codes for 2023-2024 and Prior Aid Years

Access the FM NAC Assumption Codes page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **EFC Assumption Codes**, and then **FM Assumption Codes**).

Use this page to review the FM assumption codes defined by the U.S. Department of Education for the aid year.

Reviewing INAS IM Assumption Codes

Access the INAS IM Assumption Codes page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **EFC Assumption Codes**, and then **INAS IM Assumption Codes**).

Use this page to review the IM assumption code defined by INAS for the aid year.

Loading Outside Application Data

Before calculating an estimated Student Aid Index (SAI) that updates the INST_CONTROL record, ensure all necessary data is properly loaded.

This section discusses:

- Loading externally sourced Outside Application (OA) data into the staging table.
- Moving Outside Application data from the staging table one student record at a time.
- Moving Outside Application data from the staging table in batches (multiple records at a time).

Loading Externally Sourced Outside Application Data into Staging Tables

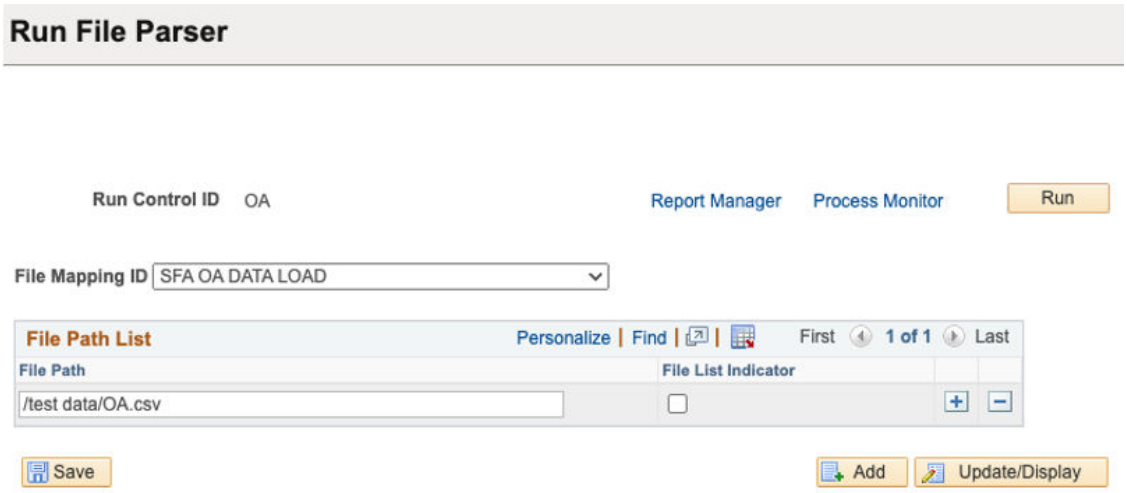
To load externally sourced data into the SFA_OA_DATA_STG table, you run the File Parser process.

Use the file mapping definition *SFA OA DATA LOAD* to map the fields in the external file to the fields in the destination record. This ensures the external file is formatted correctly so that you can load the OA data into the staging table.

For more information about this process, see Campus Community Fundamentals: Running the File Parser Process.

This example illustrates the fields and controls on the Run File Parser page.

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Related Topics

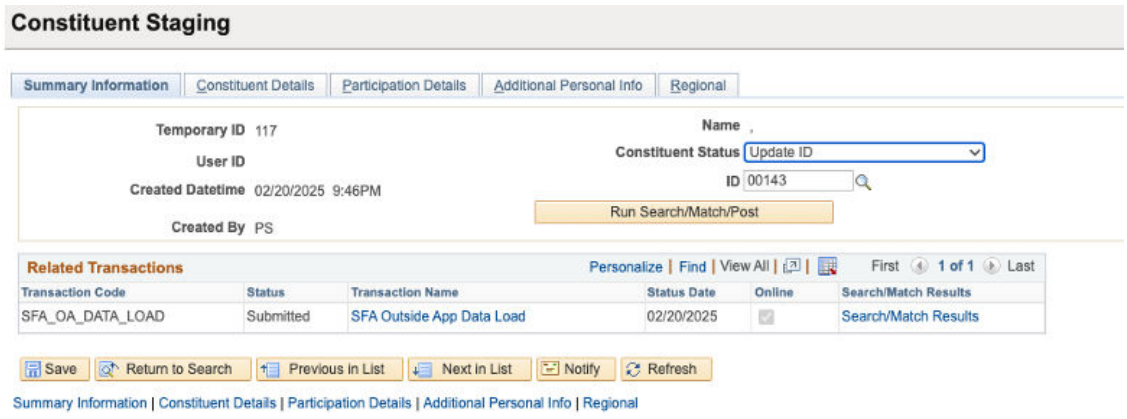
- Campus Community Fundamentals: Understanding the File Parser Process

Moving Outside Application Data From the Staging Table One Student Record at a Time

Access the Summary Information page (**Financial Aid**, and then **File Management**, and then **Outside Application**, and then **Constituent Staging**).

A transaction-specific staging record is delivered to support moving OA data one record at a time from the staging table SFA_OA_DATA_STG to the production table OA_DATAPIA. For this process, we're leveraging the CTM Framework. For more information about this framework, see Campus Community Fundamentals: Understanding CTM.

This example illustrates the fields and controls on the Summary Information page.



From this page, you can:

- Review the constituent status for a specific Temporary ID, the constituent error messages, and the transactions performed for or by the user.
- Run the search/match/post process or post the transaction data.

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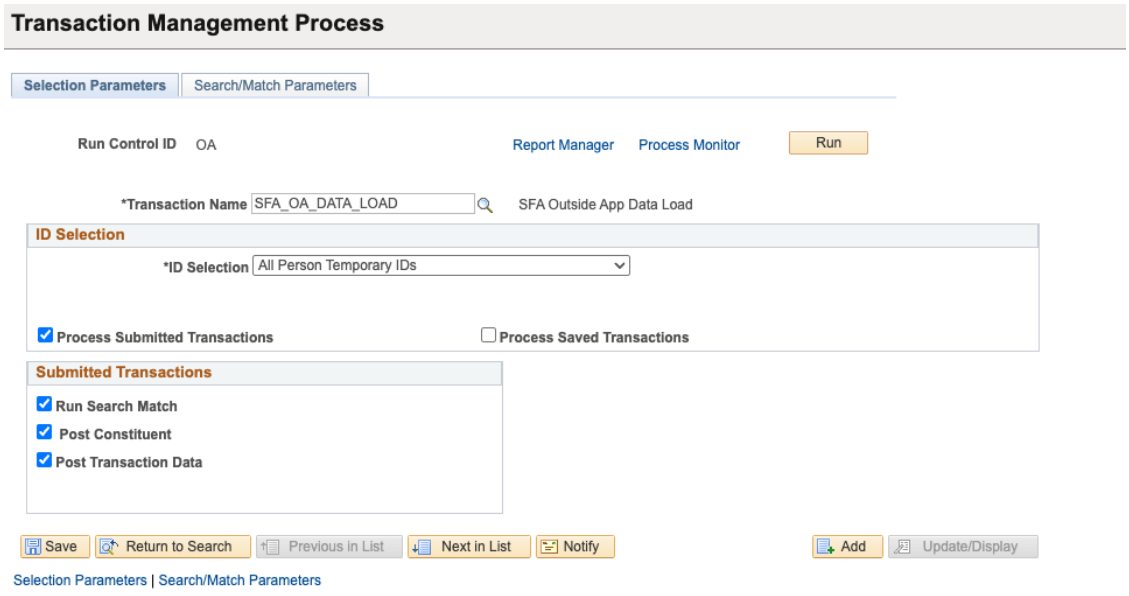
- Manually trigger Search/Match to review the list of potentially matching candidates.

For more information, see Campus Community Fundamentals: Reviewing Constituent Information.

Moving Outside Application Data From the Staging Table in Batches (Multiple Records at a Time)

Access the Selection Parameters page (**Financial Aid**, and then **File Management**, and then **Outside Application**, and then **Transaction Management Process**, and then **Selection Parameters**).

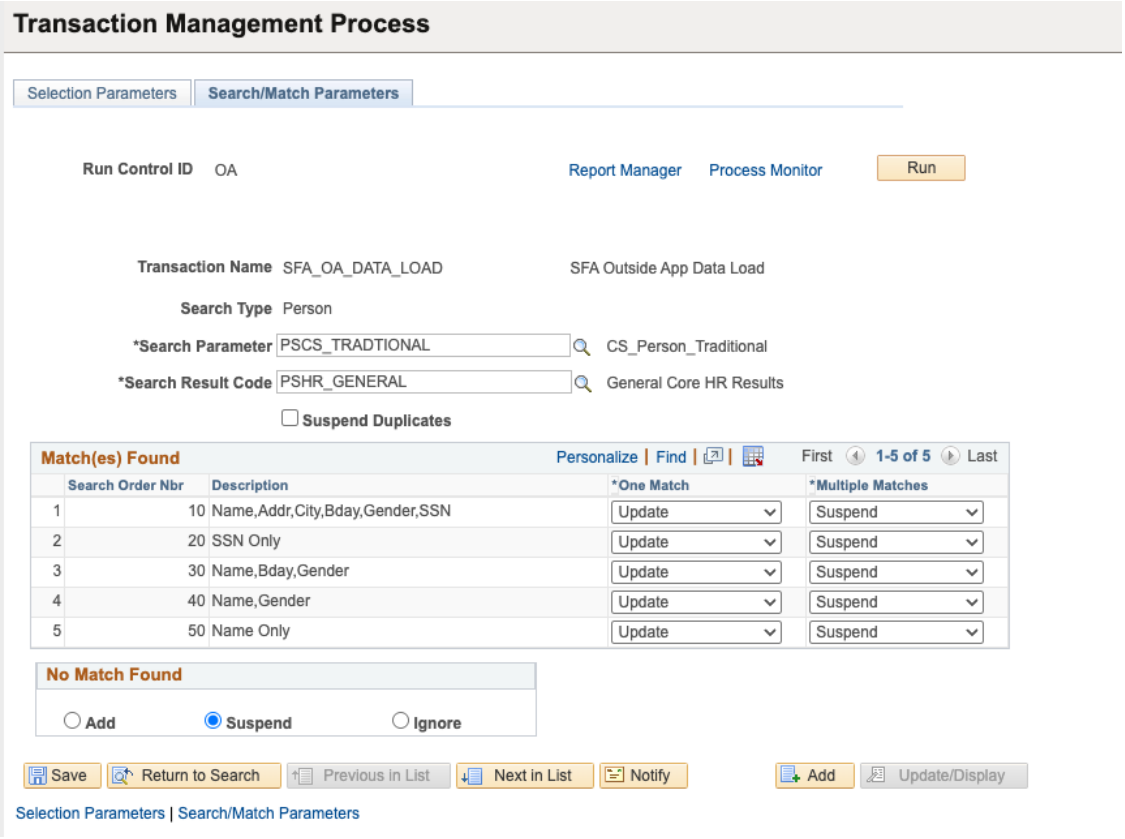
This example illustrates the fields and controls on the Selection Parameters page.



Field or Control	Description
Transaction Name	Select **SFA_OA_DATA_LOAD**.

This example illustrates the fields and controls on the Search/Match Parameters page.

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Run the Transaction Management process to load temporary constituent IDs stored inside the constituent and the transaction staging tables. You can process all IDs, just one at a time, or use Population Selection to select staged IDs meeting custom criteria. You can decide to only process the submitted transactions, the saved transactions, or a combination of both. The process enables you to change the transaction status from *Saved* to *Submitted,* run Search/Match and once an EMPLID is identified, post the constituent and transaction data to production tables. The Transaction Management process doesn't process IDs with a Constituent Status set to *Canceled* or for which their transaction is already *Posted.* It also doesn't run the Search/Match process when an EMPLID is already identified or the Constituent Status is set to *Ignored, Suspended,* or *Error.*

Related Topics

- Campus Community Fundamentals: Running Transaction Management Process

Reviewing Outside Application Data

After loading Outside Application (OA) data to the staging table, you can access the Outside Application Staging component to view the staging records.

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Pages Used to Review Outside Application Data

Page Name	Definition Name	Navigation	Usage
Student Information	SFA_OA_STG_PAGE1	**Financial Aid**, and then **File Management**, and then **Outside Application**, and then **Outside Application Staging**, and then **Student Information**	Access a read-only view of OA input data that's been loaded to the FSA_OA_DATA_STG table.
View Outside Application Audit Fields	OA_CORR_AUDITS	**Financial Aid**, and then **Outside Application Data** , and then **View Outside App Audit Fields**	View the history of record/field input data that's been loaded at the student level.

Managing Outside Application Data

This section discusses how to define global policy options for your student population and how to override them. It also discusses how to add, update, and delete Outside Application records as well as calculate estimated SAI values.

> **Note**
>
> Outside Application (OA) calculations are supported for aid years 2024-2025 and forward.

Pages Used to Manage Outside Application Data

Page Name	Definition Name	Navigation	Usage
Global Options	INAS_LCL_PLCY1_nn	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **NA 20nn–20nn Global Options**, and then **Global Options**	Define global policy options for most your student population. You can override these options on a student-by-student basis. These options affect your SAI and estimated SAI calculations. You can enter values for other option rule sets that are developed by your institution.
Mass EFC Calculation	SFA_RUNCTL_NAC_BCH	**Financial Aid**, and then **File Management**, and then **Mass EFC Calculation**	Calculate OAs in mass based on policy options.

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Page Name	Definition Name	Navigation	Usage
Student Information	OA_PIA_CS1	**Financial Aid**, and then **Outside Application Data**, and then **Outside Application**, and then **Student Information**	Update student information.
Spouse Information	OA_PIA_CS2	**Financial Aid**, and then **Outside Application Data**, and then **Outside Application**, and then **Spouse Information**	Update student spousal information.
Parent Information	OA_PIA_CS3	**Financial Aid**, and then **Outside Application Data**, and then **Outside Application**, and then **Parent Information**	Update information about the parent.
Parent Spouse/Partner	OA_PIA_CS4	**Financial Aid**, and then **Outside Application Data**, and then **Outside Application**, and then **Parent Spouse/ Partner**	Update information about the parent's spouse or partner.
Transaction Detail	OA_PIA_CS5	**Financial Aid**, and then **Outside Application Data**, and then **Outside Application**, and then **Transaction Detail**	Update the student's transactions.
SAI and Flags	OA_PIA_CS6	**Financial Aid**, and then **Outside Application Data**, and then **Outside Application**, and then **SAI and Flags**	View information about SAI and flags.
Outside Application Delete	SFA_OA_DELETE	**Financial Aid**, and then **File Management**, and then **Outside Application**, and then **Delete OA Records**	Delete OA data for specific IDs.

Adding and Updating Outside Application Records

Access the Outside Application component (**Financial Aid**, and then **Outside Application Data**, and then **Outside Application**).

Use the pages in the Outside Application component—Student Information, Spouse Information, Parent Information, Parent Spouse/Partner, Transaction Detail, and SAI and Flags —to add, view, and edit OA records.

Use the OA process to select records with OA data and calculate estimated Student Aid Index (SAI) values. The OA calculation leverages the FM NAC Java calculator code. Input field valid

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values align with the applicable aid year's ISIR Record Layout published by the Department of Education.

> **Note**
>
> The OA calculation results updates INST_CONTROL. If IM INAS calculation results are already stored on INST_CONTROL, the IM INAS data will be overridden.

Field or Control	Description
Get Federal Data	Click to pull over the latest ISIR information. **Note:** There's no requirement to use this. This process is available only when an ISIR is loaded for the student.
Calc SAI	Click to start the calculation process.
Need Summary	Click to view the academic and nonstandard award period COA, institutional EFC, Need, and so on.
OA	Click to access the Outside Application Extension page. From the Outside Application Extension page, you can override the global policy options
Override Federal SAI	Access this link from the Outside Application Extension page. When you click this link, the Outside App SAI Override page appears, and from that page you can override the estimated SAI for the academic and nonstandard award periods on INST_CONTROL.

Calculating Outside Applications in Mass

Access Mass EFC Calculation page (**Financial Aid**, and then **File Management**, and then **Mass EFC Calculation**).

This process requires the FM Need Analysis Calculator (NAC) for OA calculations. You need to set up mass EFC parallel processing before you can use the Mass EFC Calculation process. See Defining Installation Level Defaults, "Mass SAI/EFC Parallel Processing Setup" for more information.

Records loaded into the INAS_CALC_RECS table are selected for processing.

Field or Control	Description
Application Type	Select the application type to run batch calculations from these options: • B: Both Federal and Profile • F: Federal • P: Profile • O: Outside Application
Clear Calc Requests (clear calculation requests)	If you select **Y**, the files are removed from the INAS_CALC_RECS table after the batch calculation.

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Field or Control	Description
Population Selection	Select this option to use equation engine, external file, or PS query to select a specific populate for the Mass EFC Calculation process.

Deleting Outside Application Records

Access Outside Application Delete (**Financial Aid**, and then **File Management**, and then **Outside Application**, and then **Delete OA Records**).

Field or Control	Description
ID	Enter the IDs of the OA records you want to delete.

FM Test Harness

A Federal Methodology (FM) Test Harness enables you to generate a feature file that can be shared with Oracle to help with replication and review of FM NAC (Need Analysis Calculator) service requests.

This section discusses:

- Generating a feature file using CLI
- Performing a standalone FM NAC Calculation

> **Note**
>
> For the 2023-2024 and prior Aid Years, the result of both the Federal Methodology (FM) and Institutional Methodology (IM) calculations for the amount of money that a student and his family are expected to contribute is referred to as Expected Family Contribution (EFC); FM EFC and IM EFC.
>
> For the 2024-2025 and future Aid Years, FM calculation result is referred to as the Student Aid Index (SAI); replacing the FM EFC.

The FM Test Harness generates a feature file for the 2023-2024 and future aid years that contains:

- The input fields with Personal Identity Information data removed or truncated sent to the FM NAC used in the most recent FM SAI/EFC calculation.
- The response data from the FM NAC that's stored on the ISIR_COMPUTED table, including the intermediate and final SAI/EFC calculations, edits, and rejects applied.

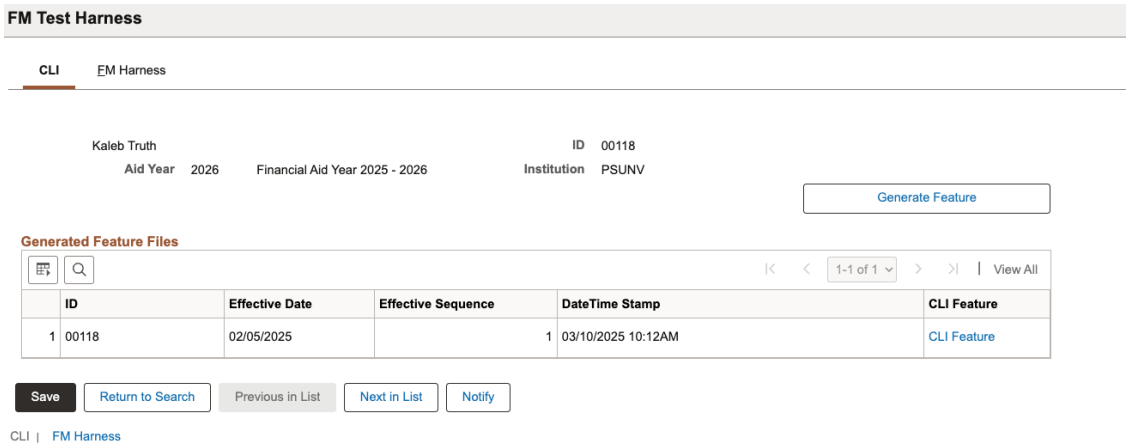
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Pages Used for FM Test Harness

Page Name	Definition Name	Navigation	Usage
CLI	SFA_TEST_CLI	**Financial Aid**, and then **Federal Application Data**, and then **FM Test Harness**, and then **CLI**	Generate a feature file using a command-line interface (CLI) to test the FM NAC.
FM Harness	SFA_NAC_FMH	**Financial Aid**, and then **Federal Application Data**, and then **FM Test Harness**, and then **FM Harness**	Perform a standalone FM NAC call that will not update ISIR_COMPUTED.

Generating a Feature File Using CLI

This example illustrates the fields and controls on the FM Test Harness - CLI page.



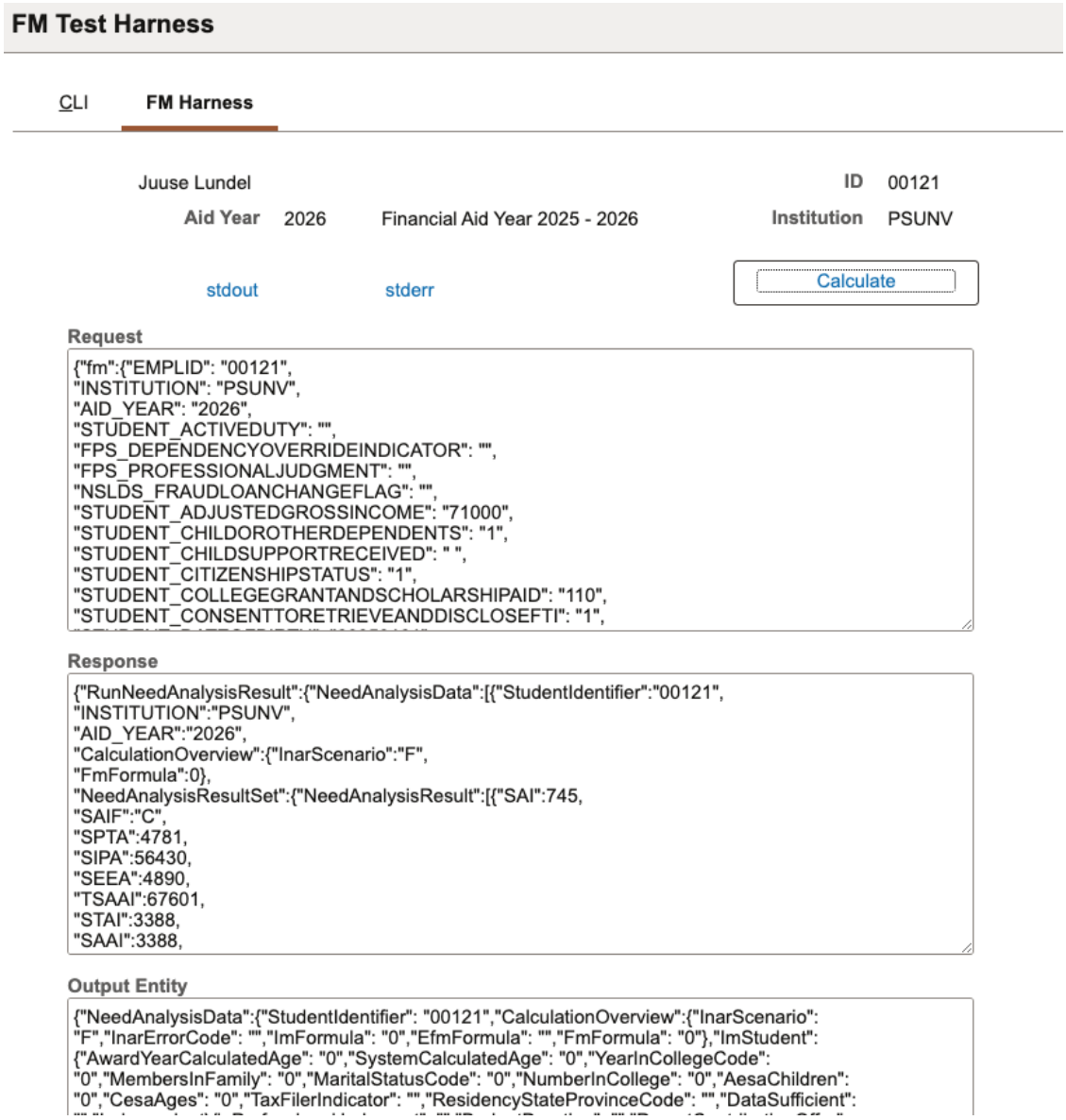
Field or Control	Description
Generate Feature	Click this to generate feature files for testing FM NAC.
Effective Date	Displays Effective Date of the ISIR record
Effective Sequence	Displays Effective Sequence of the ISIR record
DateTime Stamp	Represents the date and time the **Generate Feature** button is clicked and **CLI Feature** link is created.
CLI Feature (Command-line Interface Feature)	Click to access the generated command-line interface (CLI) feature file based on the data stored in ISIR_COMPUTED.

Performing a Standalone FM NAC Calculation

Access the FM Harness page (**Financial Aid**, and then **Federal Application Data**, and then **FM Test Harness**, and then **FM Harness**).

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This example illustrates the fields and controls on the FM Harness page.



Use this page to generate a feature file to test the FM NAC.

Field or Control	Description
Calculate	Click to perform a standalone FM NAC calculation that doesn't update ISIR_COMPUTED.
Request	Displays the input data fields that are sent to the FM NAC Java calculator code for the SAI calculation.
Response	Displays the response field values returned by the FM NAC Java calculator code based on the request input data.

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Field or Control	Description
Output Entity	JSON view of the response field values returned by the FM NAC Java calculator code based on the request input data.

IM Test Harness

The Institutional Methodology (IM) Test Harness enables you to generate a request JSON file that can be shared with Oracle to help with replication and review of IM INAS service requests.

The IM Test Harness generates a request JSON file for the 2024-2025 and future aid years that contains the input fields that were used in the most recent IM INAS calculation. Personal Identity Information data has been removed or truncated.

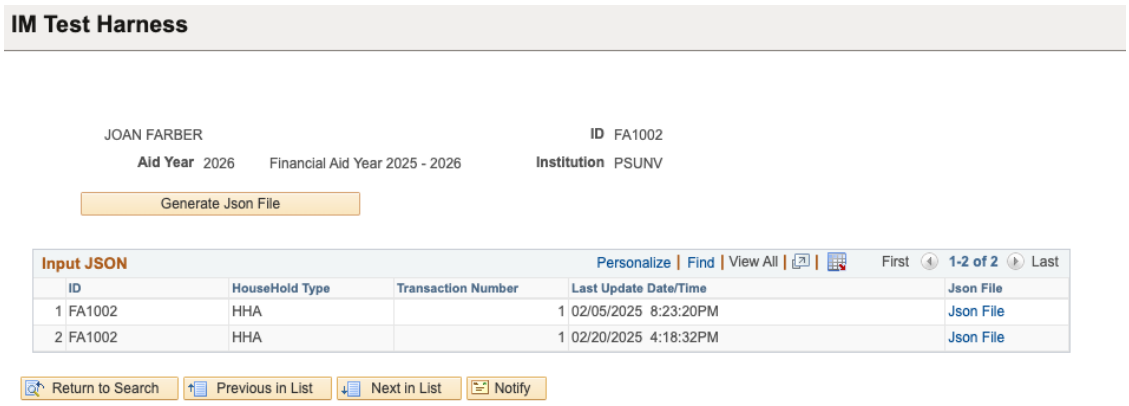
Page Used for IM Test Harness

Page Name	Definition Name	Navigation	Usage
IM Test Harness	SFA_NAC_IM_JSON	**Financial Aid**, and then **Institutional Application Data**, and then **IM Test Harness**	Generate a request JSON file to test the IM INAS calculation.

Generating a Request JSON File to Test IM INAS Calculation

Access the IM Test Harness page (**Financial Aid**, and then **Institutional Application Data**, and then **IM Test Harness**

This example illustrates the fields and controls on the IM Test Harness page.



Field or Control	Description
Generate Json File	Click to generate request JSON files for testing IM INAS calculation.
Effective Date	Displays the effective date of the Profile record.

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Field or Control	Description
Effective Sequence	Displays the effective sequence of the Profile record.
DateTime Stamp	Represents the date and time the **Generate Json File** button is clicked and **Json File** link is created.
Json File	Click to access the generated request JSON file based on the data stored in INST_CONTROL.

OA Test Harness

The Outside Application (OA) Test Harness enables you to generate a feature file that can be shared with Oracle to help with replication and review of OA service requests.

This section discusses:

- Generating a feature file to test OA calculation
- Performing a standalone OA calculation

The OA Test Harness generates a feature file for the 2024-2025 and future aid years that contains:

- The input fields with Personal Identity Information data removed or truncated sent to the FM NAC that's used in the most recent OA calculation.
- The response data from the FM NAC that's stored on the INST_CONTROL table, including the intermediate and final estimated SAI calculations, edits, and rejects applied.

Pages Used for OA Test Harness

Page Name	Definition Name	Navigation	Usage
CLI	SFA_TEST_OA_CLI	**Financial Aid**, and then **Outside Application Data**, and then **OA Test Harness**, and then **CLI**	Generate a feature file to test the OA calculation. This works similarly to FM Test Harness.
OA Harness	SFA_NAC_OA	**Financial Aid**, and then **Outside Application Data**, and then **OA Test Harness**, and then **OA Harness**	Perform a standalone OA calculation that doesn't update INST_CONTROL.

Generating a Feature File to Test OA Calculation

Use the CLI page (**Financial Aid**, and then **Outside Application Data**, and then **OA Test Harness**, and then **CLI**).

Field or Control	Description
Generate CLI	Click to generate feature files for testing the OA calculation.

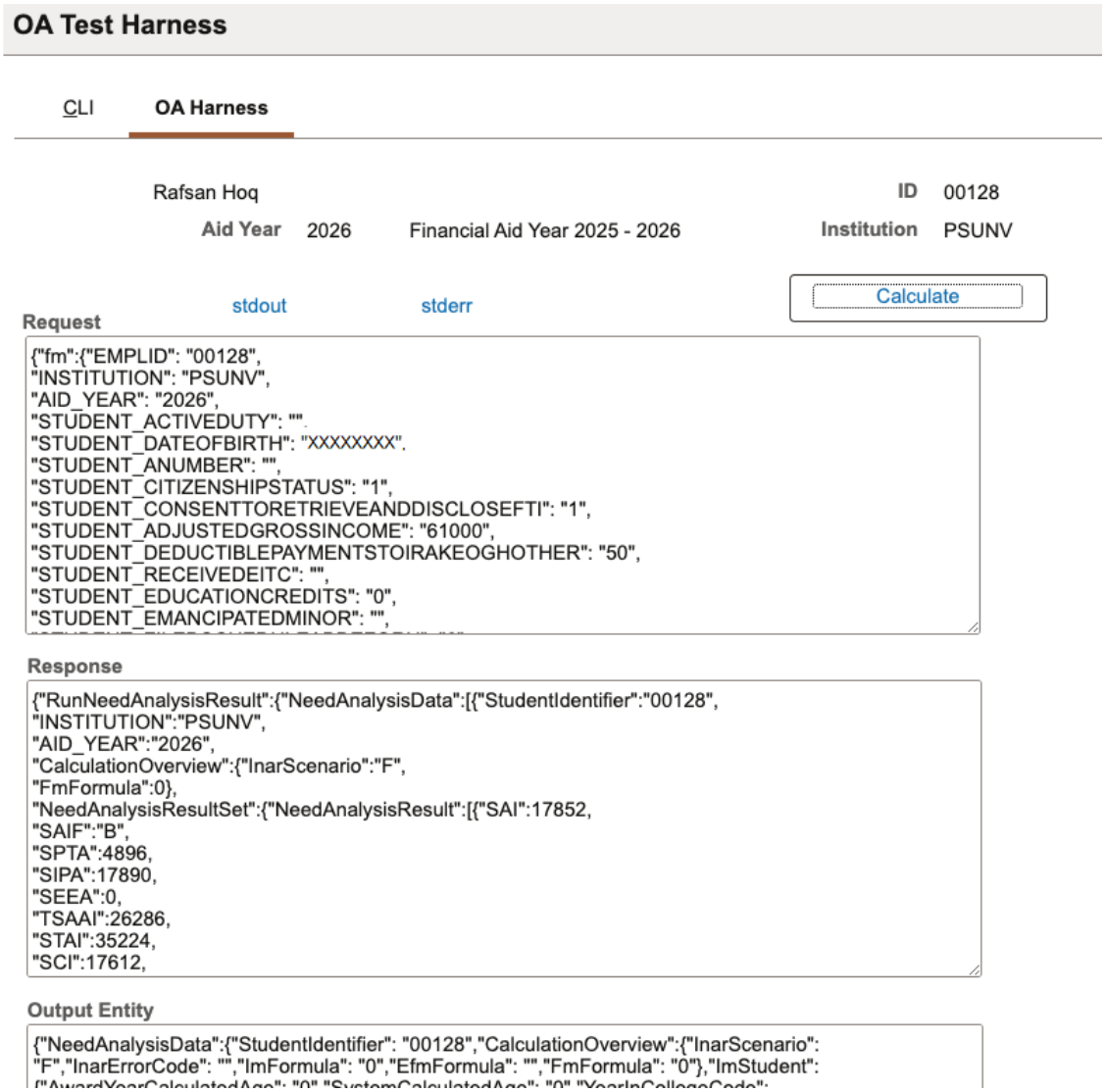
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Field or Control	Description
DateTime Stamp	Represents the date and time **Generate CLI** is clicked and the **CLI Feature** link is created.
CLI Feature	Click to access the generated command-line interface (CLI) feature file based on the data stored in ISIR_COMPUTED.

Performing a Standalone OA Calculation

Use the OA Harness page (**Financial Aid**, and then **Outside Application Data**, and then **OA Test Harness**, and then **OA Harness**).

This example illustrates the fields and controls on the OA Harness page.



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Field or Control	Description
Calculate	Click to preform a standalone OA calculation that doesn't update INST_CONTROL.
Request	Displays the OA input data fields that are sent to the FM NAC Java calculator code for the estimated SAI calculation.
Response	Displays the response field values returned by the FM NAC Java calculator code based on the request input data for the estimated SAI calculation.
Output Entity	JSON view of the response field values returned by the FM NAC Java calculator code based on the request input data for the estimated SAI calculation.

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25

Assessing Eligibility for Financial Aid

Setting Up Verification Options

Verification is the process of checking the accuracy of the information provided by students and their families when applying for financial aid. Institutions are required to perform federal verification on a portion of their aid applicants before awarding Title IV aid. The Campus Solutions application provides options for meeting federal and institutional verification requirements.

This section discusses how to set up fields for compare.

For more information see, the Federal Student Aid Handbook on the US Department of Education Information for Financial Aid Professionals (IFAP) website.

Pages Used to Set Up Verification Options

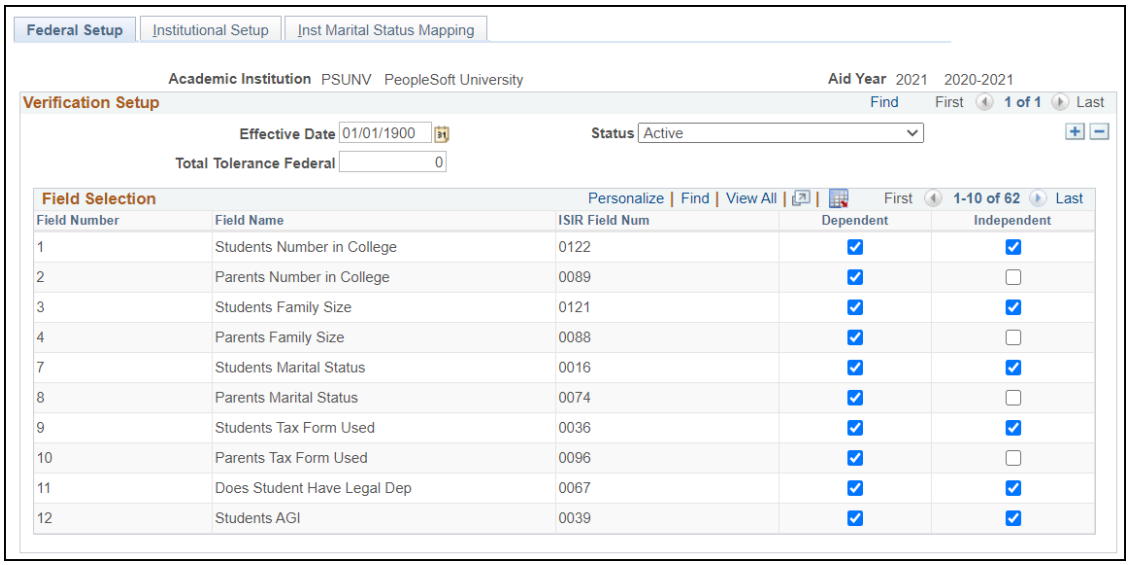
Page Name	Definition Name	Navigation	Usage
Federal Setup	SFA_VER_FLD_TS_FED	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Verification Setup**, and then **Federal Setup tab**	Activate fields for federal verification processing and filter for use by dependency status.
Institutional Setup	SFA_VER_FLD_TS_INS	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Verification Setup**, and then **Institutional Setup tab**	Activate fields for institutional verification processing and filter for use by dependency status.
Inst Marital Status Mapping	SFA_VERIF_MAR_MAP P	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Verification Setup**, and then **Inst Marital Status Mapping**	Map available parent marital statuses to institutional marital statuses

Setting Up Tolerances

Access the Federal Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Verification Setup**, and then **Federal Setup**).

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



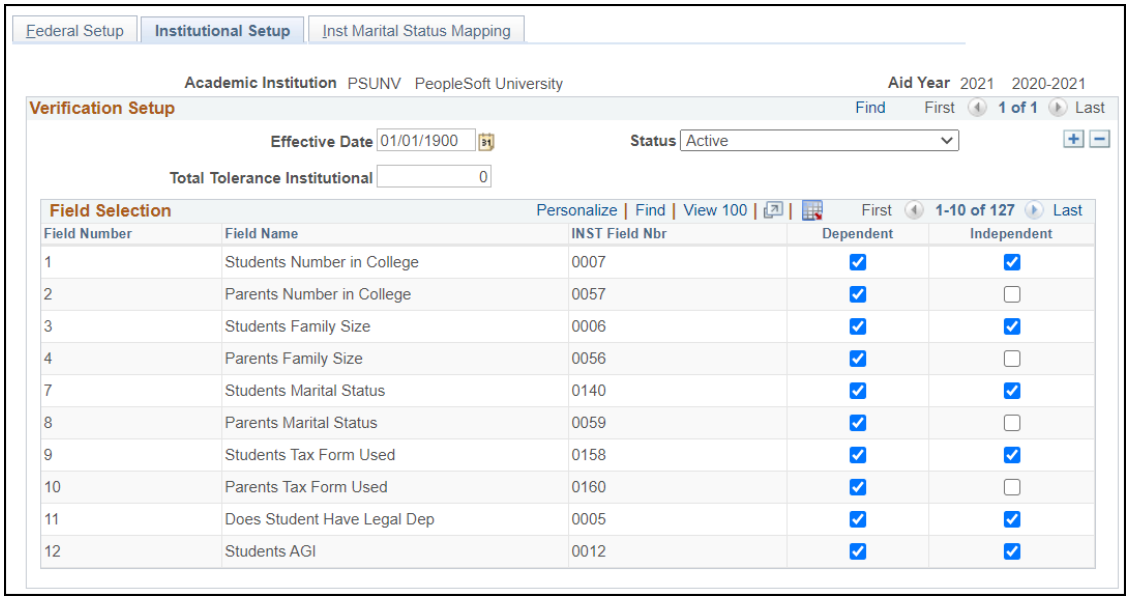
Select fields to be verified by selecting the check box for the type of student you want to verify: Dependent, Independent, or both.

Field or Control	Description
Effective Date	Displays the effective date for these verification tolerance rules. The effective date defines when the status that you select is valid.
Status	Displays the status for the data. Values are *Active* and *Inactive*.
Total Tolerance Federal	Enter the amount that the combined total of all selected fields can vary between verified and reported information. This tolerance is the maximum difference that can exist as variance before failing the verification process.
Field Number	Enter the field number for each of the fields to be compared.
Field Name	Displays the corresponding name for each field to verify.
Dependent	Select to compare the field for dependent students.
Independent	Select to compare the field for independent students.

Access the Institutional Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Verification Setup**, and then **Institutional Setup**).

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

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Select fields to be verified by selecting the check box for the type of student you want to verify: Dependent, Independent, or both.

Refer to the field descriptions for the Federal Setup page with the following exceptions:

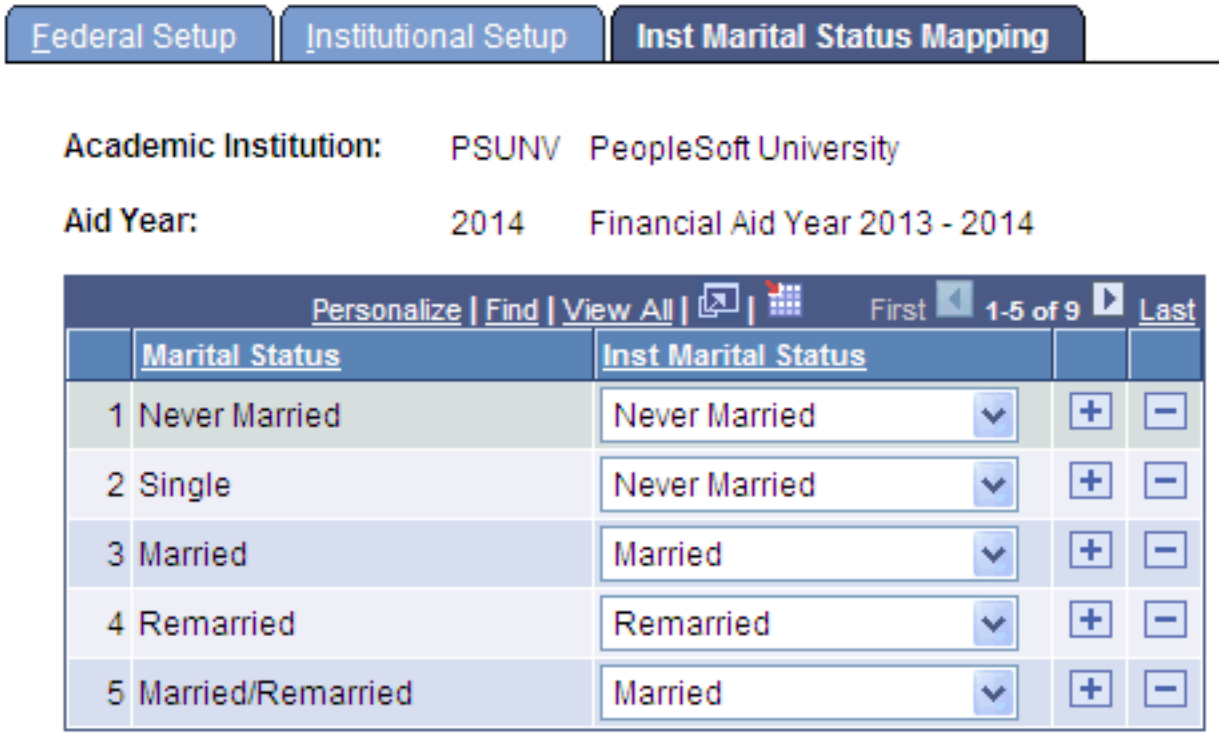
Field or Control	Description
Total Tolerance Institutional	Enter the amount that the combined total of all selected fields can vary between verified and reported information. This tolerance is the maximum difference that can exist as variance before failing the verification process.
Parent Untaxed IRA Dist/Pension (parent untaxed individual retirement account distributions)	For Institutional Verification, selecting this field only verifies parent untaxed IRA distributions. To verify parent untaxed pension or annuity distributions, select **Par Untax Pen Annuity Disbt**.
Par Untax Pen Annuity Disbt (parent untaxed pension and annuity distributions)	Select to verify parent untaxed pension or annuity distributions only.

Mapping Institutional Marital Statuses

Access the Inst Marital Status Mapping page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Application Processing**, and then **Verification Setup**, and then **Inst Marital Status Mapping**).

This example illustrates the fields and controls on the Institutional Marital Status Mapping page. You can find definitions for the fields and controls later on this page.

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Use this page to map system marital status values to Institutional marital statuses.

Field or Control	Description
Marital Status	Displays all possible ISIR and Institutional parent marital statuses

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Field or Control	Description
Inst Marital Status	Select the Institutional parent marital status you wish to map to each of the possible marital statuses. **Note:** This setup resolves differences between ISIR (Federal) and PROFILE (Institutional) parent marital statuses when performing Verification without first retrieving application data via 'Get Federal Data' or 'Get Institutional Data'. If you have retrieved application data, the system renders the parent marital statuses based on the application type, Federal or Institutional. However, if application data is not first retrieved, the system cannot determine if the data being verified is Federal or Institutional and renders *all* possible parent marital statuses. When you consolidate Verification data either online or batch, you are required to select the type of consolidation being performed, Federal or Institutional. Parent marital statuses for consolidation can be mapped without interpretation for Federal Verification. However, Institutional parent marital statuses do not possess the same characteristics and this setup allows you to map the 9 possible parent marital statuses to the 6 actual Institutional parent marital statuses. When consolidation is performed, regardless of what marital status is selected in the Tax Form Data page, the mapped value is used and displayed for consolidation and compare. For example, if you enter a marital status of Married/Remarried and Institutional consolidation is performed, your mapping setup determines if Married or Remarried is used in consolidation.

Verification Field Numbers

To access year specific Verification field numbers cross referenced for ISIR and Institutional applications, query ISIR_VERIF_XREF.

Verifying Resource and Household Information for the 2023-2024 and Prior Aid Years

Use the pages in the Application Data Verification component to verify the number of persons in the household, the number enrolled in post-secondary education, the AGI, income tax paid for the base year, and certain untaxed income and benefits for the base year.

This section provides an overview of calculating Federal Variance and discusses how to:

- View Financial Aid Administrator Information.
- Verify household information.
- Verify tax data.

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- Verify W-2 information.
- Verify federal untaxed income.
- Verify federal additional financial information.
- Verify institutional untaxed income.
- Verify institutional other taxable income.
- Consolidate forms.
- View consolidated federal tax data.
- View consolidated institutional tax data.

> **Note**
>
> The navigation paths for the pages listed in the following table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Pages Used to Verify Resource and Household Information

Page Name	Definition Name	Navigation	Usage
FAA Information	SFA_VER_FAA_INFO	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **FAA Information**	Displays financial aid administrator information.
Household Info	VERIF02_FORM1	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Household Info**	Enter documented information about the student and members of the student's household.
TIV School Information	VERIF_SCHL_CD_SEC	Click the **TIV Information** link on the Household Info page. This link appears when you enter a valid school code.	View Title IV school information.
Get Institutional Data	VERIF_APP_SRC_CODE	Click the **Get Inst Data** button on the Household Info page.	Indicate which Application Source code to use to populate fields with institutional data.
Tax Form Data	VERIFnn_FORM2	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Form Data**	Enter information reported on the filer's tax form.

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Page Name	Definition Name	Navigation	Usage
Student's Income from Wages	VERIF_WAGES_STDNT	Click the **Student/ Spouse Wages** link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Parent Income from Wages	VERIF_WAGES_PARENT	Click the **Parent's Wages** link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Other Taxable Income	SFA_OTHER_INC1_nn	Click the **Other Taxable Income** link on the Tax Form Data page.	Enter 1040 taxable income line items other than wages.
Income Adjustments	SFA_INCOME_ADJ_09	Click the **Income Adjustments** link on the Tax Form Data page.	Record 1040 adjustments to income. The tax form recorded as filed determines which fields activate. Values entered here write to Tax Form Data/Income Adjustments and may affect Federal and Institutional specific verification pages.
Tax, Credits and Payments	SFA_TAXCREDIT_nn	Click the **Tax, Credits, and Payments** link on the Tax Form Data page.	Enter or view tax and credit data. The filed tax form determines which fields are active. With the exception of Earned Income Credit and Additional Child Tax Credit, credits entered are subtracted from the tax amount. The net calculated amount writes to Tax Form Data - **US Income Tax Paid** field.
W-2 Form	VERIF03_FORM3	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **W-2 Form**	Enter or view information reported on a person's W-2 form.
Verification W2 - Box 12	VERIF03_W2_BOX12	Click the **Box 12** link on the W-2 Form page.	Enter or view information from Box 12 on the W-2 form.

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Page Name	Definition Name	Navigation	Usage
Fed Untax Income	SFA_FED_UNTAX_INC	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Untax Income**	Enter or view federal untaxed income data. Displays only field values that originate from Total Other Income or Income Adjustment pages. The family member row determines which fields are active.
Fed Add Fin Info	SFA_FEDADFIN_IN_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Add Fin Info**	Enter or view federal additional financial information. Display only field values originate from U.S. Income Tax Paid page.
Inst Untax Income	SFA_INST_UTX_IN_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Untax Income**	Enter or view Institutional untaxed income data. Display only field values originate from Untaxed Income or Income Adjustment pages. The family member row determines which fields are active.
Inst Other Taxable	SFA_INSTOTH_TAX_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Other Taxable**	Enter or view institutional other taxable income. Display only field values originate from Total Other Income page. The family member row determines which fields are active.
Tax Data Consolidation	VERIF_TAX_CONSL_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Data Consolidation**	Combine the income and resources of all family members of the individual being verified.
Consolidated Tax Data — Federal	SFA_VER_CSL_FEDnn	Click the **Consolidated Tax Data** link on the Tax Data Consolidation page.	View or edit consolidated federal tax and resource information.
Consolidated Tax Data – Inst	SFA_VER_CSL_ISTnn	Click the **Consolidated Tax Data** link on the Tax Data Consolidation page.	View or edit consolidated institutional tax and resource information.

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Viewing Financial Aid Administrator Information

Access the FAA Information page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **FAA Information**).

Use this page to view Financial Aid Administrator data from the student's loaded ISIR.

For field descriptions of the header information on this page,

See Reviewing the Student's Packaging Status.

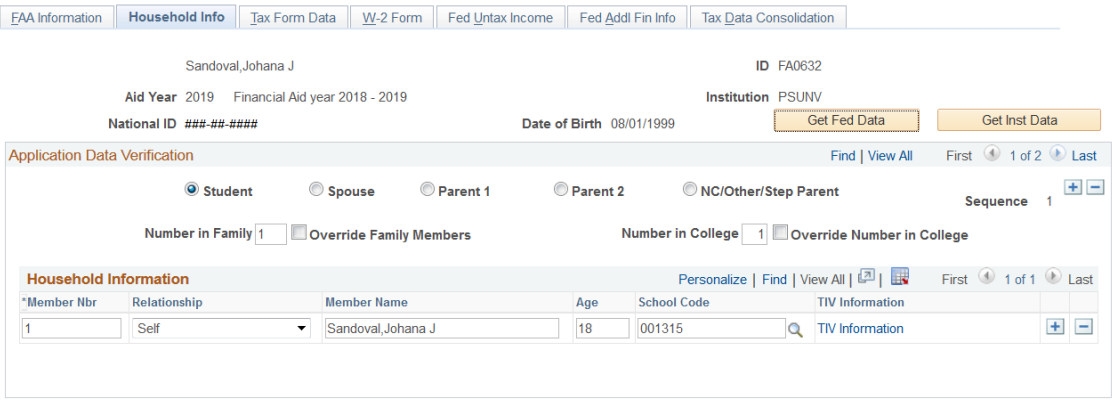
For field descriptions of the FAA Information,

See Making ISIR Corrections for 2022-2023 and 2023-2024.

Verifying Household Information

Access the Household Info page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Household Info**).

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



The system displays the student information, including **National ID.** For students in the United States, the **National ID** is the Social Security number (SSN).

The page maintains a separate row for each household member. Ensure that you are accessing the correct row for the person you are verifying.

Field or Control	Description
Get Fed Data (get federal data)	Click this button to populate fields with the most recent Institutional Student Information Record (ISIR) record data. When federal data is retrieved, the Inst Untax Income page and Inst Other Taxable page are hidden. **Note:** If the Student or Parent IRS Request is "02", data was transferred from the IRS and not changed prior to submission of the application. For these records, using *Get Fed Data* is optional.

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Field or Control	Description
Get Inst Data (get institutional data)	Click this button to populate fields with institutional record data. The system prompts you to enter an **Application Source Code:**:*FT Canada Student Loan* (full-time Canadian student loan), *Institutional Application, Profile, or PT Canada Student Loan* (part-time Canadian student loan). When institutional data is retrieved, the Fed Untax Income page and Fed Add Fin Info page are hidden.

> **Note**
>
> Once you've retrieved the Federal or Institutional data, relevant tabs display.

Application Data Verification

Select the radio button for the person whose Application Data that you want to verify:

- *Student*
- *Spouse*
- *Parent 1*
- *Parent 2*
- *NC/Other/Step Parent* (non-custodial parent/other/step-parent)

> **Note**
>
> If a non custodial parent file (HHB) only is present, verification cannot be performed.

Field or Control	Description
Sequence	Sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified.
Number in Family	Enter the number in the student's family.
Override Family Members	Select to override the number of family members used to calculate the expected family contribution (EFC).
Number in College	Enter the number of the student's family members in college.
Override Number in College	Select to override the number of family members in college used to calculate the EFC.

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Household Information

Field or Control	Description
Member Nbr (member number)	Displays the household member counter. The system increases this field by one for each row inserted at the household member level.
Relationship	Select the relationship to the student of the person selected in **Sequence.** For example, the sequence for an independent student might be, self, spouse, son. Data verification for the parent of a dependent student might be self (Parent 1), spouse, son (student applicant), daughter. You would not complete the family grid or enter number in family or college values for a dependent student row. All dependent students must be listed as a relation with only Parent 1, Parent 2, or NC/Other/Step Parent to be counted in the parent household. Recording the student in more than one of these categories results in over counting. Members listed for student and spouse household categories are compared to household size and the value for number in college for the student. Members listed for Parent 1, Parent 2, and NC/Other/Step Parent are compared to household size and the value for the number in college for parent (dependent students are always included in the parent household in an aid application).
School Code	Enter a valid school code, if applicable. Entering a valid school code enables the system to calculate a value for the **Number In College** field. If the school code remains blank, the system does not calculate the number in college. A **TIV Information** link becomes available when you enter a valid college code. It displays demographic information for the school.
TIV Information	This link only appears when a valid **School Code** is selected. Click the link to open the TIV School Information page.

Verifying Tax Data

Access the Tax Form Data page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Form Data**).

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Field or Control	Description
Sequence	Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. The selected radio button indicates the person whose information is being verified. **Note:** If a spouse row is created, the values from the student are always used in consolidation for **Tax Return Filed**, **Tax Form**, **1040 Schedule 1 Filed**, and **Marital Status**. However, if a student value for one of these fields is blank, the student's **Filing Status** is not *Separate*, and the corresponding spouse value is non-blank, then the spouse value is used. If more than one parent row is created, the **Marital Status** of Parent 2 overrides that of Parent 1 in consolidation. **Tax Return Filed**, **Tax Form**, and **1040 Schedule 1 Filed** are consolidated according to the sequence number. If a value is blank for one parent and non blank for the other then the non blank value is used. For example, if the Parent 1 sequence number is 2 with a **Tax Return Filed** of *blank* and the Parent 2 is sequence number 3 and **Tax Return Filed** is *Will File*, then the Parent 2 value for **Tax Return Filed** is used in consolidation. If both parents have a **Tax Return Filed** value and they happen to differ, then the parent with the lower sequence number value is used.

Filing Information

Field or Control	Description
Tax Return Filed	Select values are dependent on verification type, Federal or Institutional.
Tax Form	Select values are dependent on verification type, Federal or Institutional. The value that you select determines which fields are activated on the Tax Form Data, Other Taxable Income, Income Adjustments and Tax, Credits and Payments pages.
1040 Schedule 1 Filed	If you select: • Yes, then the student *isn't* eligible to file tax form 1040-EZ. • No, then the student *is* eligible to file tax form 1040-EZ.
Marital Status	Select the marital status of the person whose documents are being verified. See Mapping Institutional Marital Statuses.

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Field or Control	Description
Tax Return Filing Status	Select the tax filing status of the person whose information is being verified. The value that you select determines which fields the system activates in the Wages page. Select from the following values: *Don't Know*, *Head of Household, Married-Joint, Married-Separate, Single,* and *Widow(er).*
Dependents	Select *Yes* if the person whose information is being verified has dependents and select *No* if not.
Wages	Enter the amount of wages for the person whose information is being verified.
Total Other Income	Enter any taxable income besides wages reported by the person whose information is being verified.
Income Adjustments	Enter any allowable adjustments to income as reported by the person whose information is being verified.
Adjusted Gross Income	Enter the total of wages and other income less income adjustments for the person whose information is being verified.
U.S. Income Tax Paid	Enter the total of U.S. income tax paid by the person whose information is being verified.

> **Note**
>
> You can enter data in the **Total Other Income, Income Adjustments,** and **U.S. Income Tax Paid** fields to override information on the associated detail pages. However, overriding information is not recommended.

Entering Student or Parent Income from Wages

Access the Student's Income from Wages page (click the **Wages** link on the Tax Form Data page).

The wage information displayed on this page depends on which **Sequence** row is active and the selections made for Filing Status.

Field or Control	Description
Wage Income Student	Displays the student's wage income or the Parent 1 wage income.
Wage Income Spouse	Displays the spouse's wage income or the Parent 2 wage income.
Wages	Displays the total wages from the wage income entries. The system uses this amount to populate the **Wages** field on the Tax Form Data page.

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Entering Other Taxable Income

The elements that appear on the Other Taxable Income page are relative to the 1040 tax form and Schedule 1. Access the Other Taxable Income page – 1040 Tax Form (click the Other Taxable Income link on the Tax Form Data page).

The **Add to Total Wages** check box for **Business Income Loss** and the **Add to Total Wages** check box for **Farm Income/Losses** are selected by default if you perform 'Get Fed Data' to pre-populate the component with ISIR data. If selected, income or loss to wages is calculated to the total wages.

Entering Tax, Credits, and Payments

Access the Tax, Credits and Payments page (click the **Tax, Credits, and Payments** link on the Tax Form Data page).

Tax Credits and Payments allows entry of pertinent data from form 1040. It captures *Line 15 Income Tax Amount* and uses that value to update U.S. Tax Paid on the Tax Form Data entry page for use in the compare process. Other fields used in compare available in Tax, Credits, and Payments are Schedule A itemized Deductions, Qualified Income Deduction, Education Credits, Earned Income Credit, and Additional Child Tax Credit.

Verifying W-2 Information

Access the W-2 Form page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **W-2 Form**).

Application Data Verification

Field or Control	Description
Sequence	Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. Ensure that you are entering and viewing data for the correct row.

Wage and Tax Statement

Field or Control	Description
Box 12	Click this link to enter or view information from Box 12 on the W-2 form.

Viewing W-2 Box 12 Information

Access the Verification W2 - Box 12 page (click the **Box 12** link on the W-2 Form page).

Field or Control	Description
Code	Refer to the W-2 instructions for details on valid values for the code.

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Verifying Federal Untaxed Income

Access the Fed Untax Income page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Untax Income**).

The **Other Unreported Income** field is not included for parent rows.

The following fields are display only fields. For all other fields on the page, you can view and enter data.

Field or Control	Description
IRA/SEP Deductions (Individual Retirement Account/Self Employment Plan Deductions)	Displays the combined amounts for IRA and SEP deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Untaxed IRA Dist/Pension	Displays the amount of funds disbursed from an IRA or pension that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between total IRA or pension payments and taxable IRA or pension payments.
Total Other Untaxed Income	Displays the total of the amounts in the untaxed income fields on this page.

Verifying Federal Additional Financial Information

Access the Fed Addl Fin Info page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Addl Fin Info**).

Field or Control	Description
Federal Benefits Received	Select each Federal benefit that the student received. If you fetch Federal data, these fields populate as recorded on the student's ISIR.
Education credit	Displays the Education Credit. This amount writes from the Tax, Credits, and Payments page.
Add. Financial Total (additional financial total)	Displays the total for all additional financial information fields on this page.

You can enter and view data in the other fields.

Verifying Institutional Untaxed Income

Access the Inst Untax Income page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Untax Income**).

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Field or Control	Description
IRA/SEP Deductions (Individual Retirement Account/Self Employment Plan Deductions)	Displays the combined amounts for IRA and SEP deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.
Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.

Institutional Untaxed Income — Parent

Field or Control	Description
IRA/SEP Deductions (Individual Retirement Account/Self Employment Plan Deductions)	Displays the combined amounts for IRA and SEP deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.
Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.
Untax IRA Annuity Pension (Individual Retirement Account)	Displays the amount of funds disbursed from an IRA or pension that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between total IRA or pension payments and taxable IRA or pension payments.
Tuition and fees deduction	Displays the amount of tuition and fees deduction derived from entries on the Income Adjustments page.

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Verifying Institutional Other Taxable Income

Access the Inst Other Taxable page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Other Taxable**).

Institutional Other Taxable Income — Student

Field or Control	Description
Taxed Financial Aid	Displays total for Grant/Scholarship Aid and Taxed Work-Study/Fellow/Assist fields. Combat Pay is not included in this total.

You can enter and view data in the other fields.

Institutional Other Taxable Income — Parent

Field or Control	Description
Taxable Refund	Displays taxable refunds. This amount writes from the Other Taxable Income page.
Alimony Income	Displays alimony income. This amount writes from the Other Taxable Income page.
Capital Gains/Loss	Displays capital gains/loss. This amount writes from the Other Taxable Income page.
Other Gains/Losses	Displays other gains/losses. This amount writes from the Other Taxable Income page.
Taxable IRA/Pension	Displays other taxable IRA and pension income. This amount writes from the Other Taxable Income page.
Unemployment Benefits	Displays unemployment benefits. This amount writes from the Other Taxable Income page.
Taxed Social Security Benefits	Displays taxed social security. This amount writes from the Other Taxable Income page.
Other Taxed Income	Displays other taxed income. This amount writes from the Other Taxable Income page.
Combat Pay	Enter or view the combat pay amount.
Total Other Income	Displays total for other taxable fields on this page. Combat Pay is not included in this total.

Institutional Other Taxable Income — NC/Other/Step Parent

This page differs from the Parent 1 and Parent 2 pages in the following way:

- Includes **Child Support Paid for Student** and **Alimony Paid** fields.
- Does not include **Child Support Received for Student** field.

Consolidating Forms

Access the Tax Data Consolidation page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Data Consolidation**).

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Field or Control	Description
Sequence	Displays the sequence number for the row of information to be verified.
Tax Consolidation Type	Select the Tax Consolidation Type you want to use. This field is active only if you do *not* select "Get Fed Data" or "Get Inst Data" for Household Verification. If you choose the Institutional Tax Consolidation Type, then the Institutional Marital Status Mapping is used. This field is display only if you use the "Get Fed Data" or "Get Inst Data". See Mapping Institutional Marital Statuses.
Consolidate	Click the **Consolidate** button to combine all income and resources. Consolidation takes whatever you have entered in the prior Application Verification pages of this component and consolidates pertinent information. Consolidation only captures the fields from Verification Setup.
Consolidated Tax Data	Click this link to view or edit all tax and resource information on the Consolidated Tax Data page. Values that appear should represent the tax form information entered for each verified person. You can make bottom-line changes to tax information here, but your changes are not saved if you re-run consolidation after the changes are made.
NCP Consolidated Tax Data (non custodial parent consolidated tax data)	Click this link to view or edit all tax and resource information on the Non-Custodial Parent Consolidated Tax Data page. Values that appear should represent the tax form information entered for each verified person. You can make bottom-line changes to tax information here, but your changes are not saved if you re-run consolidation after the changes are made. **Note:** This link only appears for PROFILE applicants.

Viewing Federal Consolidated Tax Data

Access the Consolidated Tax Data – Federal page (click the **Consolidated Tax Data** link on the Tax Data Consolidation page).

> **Note**
>
> The fields on this page compare to your target tables.

For descriptions of the fields in this section, please refer to the United States Department of Education's *Electronic Data Exchange Technical Reference* or

See Making ISIR Corrections for 2022-2023 and 2023-2024.

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Student's Tax Data

Field or Control	Description
Marital Status	Displays the marital status of the student based on ISIR values.
Federal Benefits Received	Check boxes indicate which Federal benefits were received.

Parent's Tax Data

Field or Control	Description
Marital Status	Displays the marital status of the Parent based on ISIR values.
Federal Benefits Received	Check boxes indicate which Federal benefits were received.

Viewing Institutional Consolidated Tax Data

Access the Consolidated Tax Data – Inst page (click the **Consolidated Tax Data** link on the Tax Data Consolidation page).

> **Note**
>
> The fields on this page compare to your target tables.

For descriptions of the fields in this section, please refer to the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas) for supporting documentation.

See Maintaining Institutional Financial Aid Applications.

Student's Tax Data

Field or Control	Description
Marital Status	Displays the marital status of the student based on Institutional values.
Benefits Received	Displays federal benefits received based in Institutional values.

Parent's Tax Data

Field or Control	Description
Marital Status	Displays marital status of the Parent based on Institutional values.
Benefits Received	Displays federal benefits received based on Institutional values.

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Verifying Resource and Household Information for the 2024-2025 and Future Aid Years

Use the pages in the Application Data Verification component to verify the number of persons in the household, the number enrolled in post-secondary education, the AGI, income tax paid for the base year, and certain untaxed income and benefits for the base year.

This section provides an overview of calculating Federal Variance and discusses how to:

- View Financial Aid Administrator Information.
- Verify household information.
- Verify tax data.
- Verify W-2 information.
- Verify federal untaxed income.
- Verify federal additional financial information.
- Verify institutional untaxed income.
- Verify institutional other taxable income.
- Consolidate forms.
- View consolidated federal tax data.
- View consolidated institutional tax data.

> **Note**
>
> The navigation paths for the pages listed in the following table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Pages Used to Verify Resource and Household Information

Page Name	Definition Name	Navigation	Usage
FAA Information	SFA_VER_FAA_INFO	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **FAA Information**	Displays financial aid administrator information.
Household Info	VERIF02_FORM1	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Household Info**	Enter documented information about the student and members of the student's household.

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Page Name	Definition Name	Navigation	Usage
TIV School Information	VERIF_SCHL_CD_SEC	Click the **TIV Information** link on the Household Info page. This link appears when you enter a valid school code.	View Title IV school information.
Get Institutional Data	VERIF_APP_SRC_CODE	Click the **Get Inst Data** button on the Household Info page.	Indicate which Application Source code to use to populate fields with institutional data.
Tax Form Data	VERIFnn_FORM2	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Form Data**	Enter information reported on the filer's tax form.
Student's Income from Wages	VERIF_WAGES_STDNT	Click the **Student/ Spouse Wages** link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Parent Income from Wages	VERIF_WAGES_PARENT	Click the **Parent's Wages** link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Other Taxable Income	SFA_OTHER_INC1_nn	Click the **Other Taxable Income** link on the Tax Form Data page.	Enter 1040 taxable income line items other than wages.
Income Adjustments	SFA_INCOME_ADJ_09	Click the **Income Adjustments** link on the Tax Form Data page.	Record 1040 adjustments to income. The tax form recorded as filed determines which fields activate. Values entered here write to Tax Form Data/Income Adjustments and may affect Federal and Institutional specific verification pages.

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Page Name	Definition Name	Navigation	Usage
Tax, Credits and Payments	SFA_TAXCREDIT_nn	Click the **Tax, Credits, and Payments** link on the Tax Form Data page.	Enter or view tax and credit data. The filed tax form determines which fields are active. With the exception of Earned Income Credit and Additional Child Tax Credit, credits entered are subtracted from the tax amount. The net calculated amount writes to Tax Form Data - **US Income Tax Paid** field.
W-2 Form	VERIF03_FORM3	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **W-2 Form**	Enter or view information reported on a person's W-2 form.
Verification W2 - Box 12	VERIF03_W2_BOX12	Click the **Box 12** link on the W-2 Form page.	Enter or view information from Box 12 on the W-2 form.
Fed Untax Income	SFA_FED_UNTAX_INC	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Untax Income**	Enter or view federal untaxed income data. Displays only field values that originate from Total Other Income or Income Adjustment pages. The family member row determines which fields are active.
Fed Add Fin Info	SFA_FEDADFIN_IN_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Add Fin Info**	Enter or view federal additional financial information. Display only field values originate from U.S. Income Tax Paid page.
Inst Untax Income	SFA_INST_UTX_IN_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Untax Income**	Enter or view Institutional untaxed income data. Display only field values originate from Untaxed Income or Income Adjustment pages. The family member row determines which fields are active.

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Page Name	Definition Name	Navigation	Usage
Inst Other Taxable	SFA_INSTOTH_TAX_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Other Taxable**	Enter or view institutional other taxable income. Display only field values originate from Total Other Income page. The family member row determines which fields are active.
Tax Data Consolidation	VERIF_TAX_CONSL_nn	**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Data Consolidation**	Combine the income and resources of all family members of the individual being verified.
Consolidated Tax Data — Federal	SFA_VER_CSL_FEDnn	Click the **Consolidated Tax Data** link on the Tax Data Consolidation page.	View or edit consolidated federal tax and resource information.
Consolidated Tax Data – Inst	SFA_VER_CSL_ISTnn	Click the **Consolidated Tax Data** link on the Tax Data Consolidation page.	View or edit consolidated institutional tax and resource information.

Viewing Financial Aid Administrator Information

Access the FAA Information page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **FAA Information**).

Use this page to view Financial Aid Administrator data from the student's loaded ISIR.

For field descriptions of the header information on this page,

See Reviewing the Student's Packaging Status.

For field descriptions of the FAA Information,

See Correcting ISIRs.

Verifying Household Information

Access the Household Info page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Household Info**).

The system displays the student information, including **National ID.** For students in the United States, the **National ID** is the Social Security number (SSN).

The page maintains a separate row for each household member. Ensure that you are accessing the correct row for the person you are verifying by selecting the correct radio button:

- *Student*
- *Student Spouse*
- *Parent*

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- *Parent Spouse/Partner*
- *NC/Other/Step Parent* (non-custodial parent/other/step-parent)

Field or Control	Description
Get Fed Data (get federal data)	Click this button to populate fields with the most recent Institutional Student Information Record (ISIR) record data. When federal data is retrieved, the Inst Untax Income page and Inst Other Taxable page are hidden.
Get Inst Data (get institutional data)	Click this button to populate fields with institutional record data. The system prompts you to enter an **Application Source Code:**:*FT Canada Student Loan* (full-time Canadian student loan), *Institutional Application, Profile, or PT Canada Student Loan* (part-time Canadian student loan). When institutional data is retrieved, the Fed Untax Income page and Fed Add Fin Info page are hidden.

> **Note**
>
> Once you've retrieved the Federal or Institutional data, relevant tabs display.

Application Data Verification

Select the radio button for the person whose Application Data that you want to verify:

- *Student*
- *Student Spouse* (for Federal verification only)
- *Parent*
- *Parent Spouse/Partner* (for Federal verification only)
- *NC/Other/Step Parent* (non-custodial parent/other/step-parent)

> **Note**
>
> If a non custodial parent file (HHB) only is present, verification cannot be performed.

Field or Control	Description
Sequence	Sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified.
Updated Family Size	Enter the number in the student's family.
Override Family Members	Select to override the number of family members used to calculate the expected family contribution (EFC)/Student Aid Index (SAI).
Number in College	Enter the number of the student's family members in college.

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Field or Control	Description
Override Number in College	Select to override the number of family members in college used to calculate the EFC/ SAI.

Household Information

Field or Control	Description
Member Nbr (member number)	Displays the household member counter. The system increases this field by one for each row inserted at the household member level.
Relationship	Select the relationship to the student of the person selected in **Sequence.** For example, the sequence for an independent student might be, self, spouse, son. Data verification for the parent of a dependent student might be self (Parent 1), spouse, son (student applicant), daughter. You would not complete the family grid or enter number in family or college values for a dependent student row. All dependent students must be listed as a relation with only Parent 1, Parent 2, or NC/ Other/Step Parent to be counted in the parent household. Recording the student in more than one of these categories results in over counting. Members listed for student and spouse household categories are compared to household size and the value for number in college for the student. Members listed for Parent 1, Parent 2, and NC/Other/Step Parent are compared to household size and the value for the number in college for parent (dependent students are always included in the parent household in an aid application).
School Code	Enter a valid school code, if applicable. Entering a valid school code enables the system to calculate a value for the **Number In College** field. If the school code remains blank, the system does not calculate the number in college. A **TIV Information** link becomes available when you enter a valid college code. It displays demographic information for the school.
TIV Information	This link only appears when a valid **School Code** is selected. Click the link to open the TIV School Information page.

Verifying Tax Data

Access the Tax Form Data page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Form Data**).

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Field or Control	Description
Sequence	Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. The selected radio button indicates the person whose information is being verified. **Note:** For Federal verification only: If a Spouse row is created (for student or parent), the Spouse data exists in its own section on the **Consolidated Tax Data** page. **Note:** For Federal verification only: If the student's marital status on the ISIR is **Married** or **Remarried** and the **Student Filed Joint Return with Spouse** is **No**, there is a row for **Student Spouse** data from the ISIR. If the parent's marital status on the ISIR is **Married** or **Remarried** and the **Parent Filed Joint Return with Spouse** is **No**, there is a row for **Parent Spouse/Partner** data from the ISIR.

Filing Information

Field or Control	Description
Marital Status	Select the marital status of the person whose documents are being verified. See Mapping Institutional Marital Statuses.
Filed 1040 or 1040NR	Select the appropriate value.
Filed Non-US Tax Return	Select the appropriate value.
Filed Joint Return with Current Spouse	Select the appropriate value.
Tax Return Filing Status	Select the appropriate value.
Child or other Dependents	Select the appropriate value.
Wages	Enter the amount of wages for the person whose information is being verified.
Total Other Income	Enter any taxable income besides wages reported by the person whose information is being verified.
Income Adjustments	Enter any allowable adjustments to income as reported by the person whose information is being verified.
Adjusted Gross Income	Enter the total of wages and other income less income adjustments for the person whose information is being verified.
U.S. Income Tax Paid	Enter the total of U.S. income tax paid by the person whose information is being verified.

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> **Note**
>
> You can enter data in the **Total Other Income, Income Adjustments,** and **U.S. Income Tax Paid** fields to override information on the associated detail pages. However, overriding information isn't recommended.

Entering Income from Wages

The wage information displayed on this page depends on which **Sequence** row is active and the selections made for Filing Status.

For Federal Verification, use the **Wages** field.

For Institutional Verification, access the Wages page (click the link that accompanies the **Wages** field on the **Tax Form Data** page).

Field or Control	Description
Wages	For Federal Verification, enter the Contributor's wage income. For Institutional Verification, displays the wages from the Wages page.
Student/Spouse Wages or **Parent's Wages**	Select this link to open the Wages page and enter wage income for Institutional Methodology.

Entering Other Taxable Income

The elements that appear on the Other Taxable Income page are relative to the 1040 tax form and Schedule 1. Access the Other Taxable Income page – 1040 Tax Form (click the Other Taxable Income link on the Tax Form Data page).

The **Add to Total Wages** check box for **Business Income Loss** and the **Add to Total Wages** check box for **Farm Income/Losses** are selected by default if you perform 'Get Fed Data' to pre-populate the component with ISIR data. If selected, income or loss to wages is calculated to the total wages.

Entering Tax, Credits, and Payments

Access the Tax, Credits and Payments page (click the **Tax, Credits, and Payments** link on the Tax Form Data page).

Tax Credits and Payments allows entry of pertinent data from form 1040. It captures *Line 15 Income Tax Amount* and uses that value to update U.S. Tax Paid on the Tax Form Data entry page for use in the compare process. Other fields used in compare available in Tax, Credits, and Payments are Schedule A itemized Deductions, Qualified Income Deduction, Education Credits, Earned Income Credit, and Additional Child Tax Credit.

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Verifying W-2 Information

Access the W-2 Form page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **W-2 Form**).

Application Data Verification

Field or Control	Description
Sequence	Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. Ensure that you are entering and viewing data for the correct row.

Wage and Tax Statement

Field or Control	Description
Box 12	Click this link to enter or view information from Box 12 on the W-2 form.

Viewing W-2 Box 12 Information

Access the Verification W2 - Box 12 page (click the **Box 12** link on the W-2 Form page).

Field or Control	Description
Code	Refer to the W-2 instructions for details on valid values for the code.

Verifying Federal Untaxed Income

Access the Fed Untax Income page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Untax Income**).

The **Other Unreported Income** field is not included for parent rows.

The following fields are display only fields. For all other fields on the page, you can view and enter data.

Field or Control	Description
IRA/SEP Deductions (Individual Retirement Account/Self Employment Plan Deductions)	Displays the combined amounts for IRA and SEP deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Untaxed Portion of IRA Dist (untaxed portion of IRA distribution)	Displays the amount of funds disbursed from an IRA that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between total IRA payments and taxable IRA payments.

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Field or Control	Description
Untaxed Portion of Pensions	Displays the amount of funds disbursed from a pension that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between total pension payments and taxable pension payments.
Foreign Earned Income Exclusion	Displays the amount of foreign earnings excluded from income and not reported on a tax form.
Total Other Untaxed Income	Displays the total of the amounts in the untaxed income fields on this page.

Verifying Federal Additional Financial Information

Access the Fed Addl Fin Info page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Fed Addl Fin Info**).

Field or Control	Description
Federal Benefits Received	Select each Federal benefit that the contributor received. If you fetch Federal data, these fields populate as recorded on the student's ISIR.
Education credit	Displays the Education Credit. This amount writes from the Tax, Credits, and Payments page.
Add. Financial Total (additional financial total)	Displays the total for all additional financial information fields on this page.

You can enter and view data in the other fields.

Verifying Institutional Untaxed Income

Access the Inst Untax Income page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Untax Income**).

Field or Control	Description
IRA/SEP Deductions (Individual Retirement Account/Self Employment Plan Deductions)	Displays the combined amounts for IRA and SEP deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.
Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.

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Field or Control	Description
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.

Institutional Untaxed Income — Parent

Field or Control	Description
IRA/SEP Deductions (Individual Retirement Account/Self Employment Plan Deductions)	Displays the combined amounts for IRA and SEP deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.
Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.
Untax IRA Annuity Pension (Individual Retirement Account)	Displays the amount of funds disbursed from an IRA or pension that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between total IRA or pension payments and taxable IRA or pension payments.
Tuition and fees deduction	Displays the amount of tuition and fees deduction derived from entries on the Income Adjustments page.

Verifying Institutional Other Taxable Income

Access the Inst Other Taxable page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Inst Other Taxable**).

Institutional Other Taxable Income — Student

Field or Control	Description
Taxed Financial Aid	Displays total for Grant/Scholarship Aid and Taxed Work-Study/Fellow/Assist fields. Combat Pay is not included in this total.

You can enter and view data in the other fields.

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Institutional Other Taxable Income — Parent

Field or Control	Description
Taxable Refund	Displays taxable refunds. This amount writes from the Other Taxable Income page.
Alimony Income	Displays alimony income. This amount writes from the Other Taxable Income page.
Capital Gains/Loss	Displays capital gains/loss. This amount writes from the Other Taxable Income page.
Other Gains/Losses	Displays other gains/losses. This amount writes from the Other Taxable Income page.
Taxable IRA/Pension	Displays other taxable IRA and pension income. This amount writes from the Other Taxable Income page.
Unemployment Benefits	Displays unemployment benefits. This amount writes from the Other Taxable Income page.
Taxed Social Security Benefits	Displays taxed social security. This amount writes from the Other Taxable Income page.
Other Taxed Income	Displays other taxed income. This amount writes from the Other Taxable Income page.
Combat Pay	Enter or view the combat pay amount.
Total Other Income	Displays total for other taxable fields on this page. Combat Pay is not included in this total.

Institutional Other Taxable Income — NC/Other/Step Parent

This page differs from the Parent 1 and Parent 2 pages in the following way:

- Includes **Child Support Paid for Student** and **Alimony Paid** fields.
- Does not include **Child Support Received for Student** field.

Consolidating Forms

Access the Tax Data Consolidation page (**Financial Aid**, and then **Verification**, and then **Manage 20nn-20nn Verification**, and then **Tax Data Consolidation**).

Field or Control	Description
Sequence	Displays the sequence number for the row of information to be verified.
Tax Consolidation Type	Select the Tax Consolidation Type you want to use. This field is active only if you do *not* select "Get Fed Data" or "Get Inst Data" for Household Verification. If you choose the Institutional Tax Consolidation Type, then the Institutional Marital Status Mapping is used. This field is display only if you use the "Get Fed Data" or "Get Inst Data". See Mapping Institutional Marital Statuses.

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Field or Control	Description
Consolidate	Click the **Consolidate** button to combine all income and resources. Consolidation takes whatever you have entered in the prior Application Verification pages of this component and consolidates pertinent information. Consolidation only captures the fields from Verification Setup.
Consolidated Tax Data	Click this link to view or edit all tax and resource information on the Consolidated Tax Data page. Values that appear should represent the tax form information entered for each verified person. You can make bottom-line changes to tax information here, but your changes are not saved if you re-run consolidation after the changes are made.
NCP Consolidated Tax Data (non custodial parent consolidated tax data)	Click this link to view or edit all tax and resource information on the Non-Custodial Parent Consolidated Tax Data page. Values that appear should represent the tax form information entered for each verified person. You can make bottom-line changes to tax information here, but your changes are not saved if you re-run consolidation after the changes are made. **Note:** This link only appears for PROFILE applicants.

Viewing Federal Consolidated Tax Data

Access the Consolidated Tax Data – Federal page (click the **Consolidated Tax Data** link on the Tax Data Consolidation page).

> **Note**
>
> The fields on this page compare to your target tables.

For descriptions of the fields in this section, please refer to the United States Department of Education's *Electronic Data Exchange Technical Reference* or

See Correcting ISIRs.

Student's Tax Data

Field or Control	Description
Marital Status	Displays the marital status of the student based on ISIR values.
Federal Benefits Received	Check boxes indicate which Federal benefits were received.

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Parent's Tax Data

Field or Control	Description
Marital Status	Displays the marital status of the Parent based on ISIR values.
Federal Benefits Received	Check boxes indicate which Federal benefits were received.

Viewing Institutional Consolidated Tax Data

Access the Consolidated Tax Data – Inst page (click the **Consolidated Tax Data** link on the Tax Data Consolidation page).

> **Note**
>
> The fields on this page compare to your target tables.

For descriptions of the fields in this section, please refer to the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas) for supporting documentation.

See Maintaining Institutional Financial Aid Applications.

Student's Tax Data

Field or Control	Description
Marital Status	Displays the marital status of the student based on Institutional values.
Benefits Received	Displays federal benefits received based in Institutional values.

Parent's Tax Data

Field or Control	Description
Marital Status	Displays marital status of the Parent based on Institutional values.
Benefits Received	Displays federal benefits received based on Institutional values.

Working with Auto Verification

This section discusses how to:

- Use auto verification.
- Edit student level tolerances.
- Edit verification status.
- Compare verification results.

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Pages Used for Auto Verification

Page Name	Definition Name	Navigation	Usage
Auto Verification	VERIF_COMP_DTL	**Financial Aid**, and then **Verification**, and then **Perform Auto Verification**, and then **Auto Verification**	Perform comparison of source and target data. Compare income documents to financial aid applications or compare ISIR to Institutional data. View comparison results to determine whether to update the target table with source information.
Student Tolerance Setup – FED	SFA_VER_STU_FED_TS	Click the **Student Tolerance Setup** link on the Auto Verification page.	View or edit federal tolerance levels.
Student Tolerance Setup – INST	SFA_VER_STU_INT_TS	Click the **Student Tolerance Setup** link on the Auto Verification page.	View or edit institutional tolerance levels.
Edit Verification Status	VERIF_RES_STAT_SEC	Click the **Edit Status** button on the Auto Verification page.	View or change verification codes or statuses.
Verification Compare Results	VERIF_TEST_DTL_SEC	Click the **Field Comparison Detail** link on the Auto Verification page.	View a summary of fields that were compared and for which the system indicated a variance.

Using Auto Verification

Access the Auto Verification page (**Financial Aid**, and then **Verification**, and then **Perform Auto Verification**, and then **Auto Verification**).

Verification is the process of comparing source data to a target set of data. Use this page to set up verification parameters.

Field or Control	Description
Verification Type	Select from: *Federal:* Applies federal setup rules to this verification. *Institutional:* Applies institutional setup rules to this verification.

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Field or Control	Description
Source	This is a translate field and should not be adjusted. Values are: *Inst App:* Data from the Institutional Application tables. *ISIR:* Data from the ISIR Data Corrections tables. *Tax/Verif:* Selected data from the Application Data Verification pages created from the Consolidate routine.
Target	This is a translate field. Translate values should not be adjusted. Values include: *Inst App:* Data from the Maintain Institutional Application tables. *ISIR:* Data from the ISIR Data Corrections tables.
Application Type	Values are: *Inst App:* Institutional application *Profile:* PROFILE application *FT - CSL:* Full-time Canadian student loan *PT - CSL:* Part-time Canadian student loan
Set to Send ISIR Correction	Select this check box to set the **Correction Status** to *Send* on ISIR corrections when the **Apply Changes** button is selected.
Use Student Level Override	Select this check box to apply verification tolerance levels for this student. This selection overrides the tolerance levels set up at the global level. Select when you want to activate changes made in the Student Tolerance setup.
Verification Sequence	Displays the verification sequence number, which tracks multiple background processes. Row insertion is suggested for sequencing online iterations. Use it to track the results and accompanying verification setup performed for this student.
Perform Compare	Click this button to compare your target and source data and to activate the **Field Comparison Detail** link when variances are found.
Apply Changes	Click this button to move marked fields to the target tables when fields that you mark as *Apply* in Field Comparison Detail (see View Field Comparison Detail) are acceptable.
Student Tolerance Setup	Click this link to open a page to view or edit fields or the tolerance amount at the student level.

Results

The system displays the results of the most recent verification setup. The fields include **Date, Tolerance, Variance, Execution Type, FED Verification Status, INST Processing Status,** and **Pass or Fail.**

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Click the **Edit Status** link to access the Edit Verification Status page, where you can change the program-generated verification statuses for federal and institutional verification and processing.

Editing Student Level Tolerances

Access the Student Tolerance Setup page (click the **Student Tolerance Setup** link on the Auto Verification page).

Use these pages to override Verification setup for individual students.

Field or Control	Description
Total Tolerance Federal and **Total Tolerance Institutional**	Enter an number to override the Total Tolerance setup.
Field Tolerance	By field, check the **Dependent** and/or **Independent** box as needed to ignore the field in Tolerance calculations.

Editing Verification Status

Access the Edit Verification Status page (click the **Edit Status** button on the Auto Verification page).

You can update the verification and processing status fields that reside on the Packaging Status Summary page. The compare process automatically updates the status to *Pending* if the comparison results exceed the tolerance. If the ISIR transaction number is 1 and the verification process passes, then the verification status changes to *Accurate.*

> **Note**
>
> The **Field Comparison Detail** link is active only after the **Perform Compare** is run.

Use the **Field Comparison Detail** link to view the field differences on the Verification Compare Results page. Only fields that have differences appear. To use the source data to update your target tables, select the **Apply** check box for the fields. If you do not select the **Apply** check box, the field value remains the same as that in your target.

Comparing Verification Results

Access the Verification Compare Results page (click the **Field Comparison Detail** link on the Auto Verification page).

This page lists fields with differences. You can select to update all or only select fields for moving to ISIR or Institution tables.

Field or Control	Description
Apply	Select this check box to use the source data to update your target tables. If you do not select the **Apply** check box, the field value remains the same as that in your target.

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Field or Control	Description
Done	Displays if the source data has been used to update your target tables.
Source	Displays data from the source table, tax/ verification, ISIR, or institutional application.
Target	Displays data from the target table, ISIR, or institutional application.
Difference	Displays the difference between the source and target information.

Using Batch Verification

This section discusses how to:

- Process batch consolidation.
- View batch consolidated tax data.
- Process batch verification.
- Use batch verification results.
- Use batch verification summary.
- Use batch verification detail.

Pages Used for Batch Verification

Page Name	Definition Name	Navigation	Usage
Batch Consolidation	RUNCTL_FA_CONSL	**Financial Aid**, and then **Verification**, and then **Perform Batch Consolidation**, and then **Batch Consolidation**	Set consolidation parameters for batch consolidation and run the process.
Batch Consolidation Detail	VERIF_CONSUL_SMRY	**Financial Aid**, and then **Verification**, and then **View Batch Consolidation**, and then **Batch Consolidation Detail**	View batch consolidation results at the student level from the Application Data Verification - Tax Consolidation Consolidated Tax Data page.
Consolidated Tax Data – Fed	SFA_VER_CSL_FED2	Click the **Consolidated Tax Data** link on the Batch Consolidation Detail inquiry page.	View federal consolidated tax information for a student or parent.
Consolidated Tax Data – Inst	SFA_VER_CSL_INST2	Click the **Consolidated Tax Data** link on the Batch Consolidation Detail inquiry page.	View institutional consolidated tax information for a student or parent.

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Page Name	Definition Name	Navigation	Usage
Batch Verification	RUNCTL_FAPCMPR1_01	**Financial Aid**, and then **Verification**, and then **Perform Batch Verification**, and then **Batch Verification**	Set parameters to verify batches and to run the process.
Batch Verification Results	RUNCTL_VERIF_SEC	Click the Results link on the Batch Verification Results page.	View summary verification information.
Batch Verification Summary	VERIF_COMP_SMRY	**Financial Aid**, and then **Verification**, and then **View Verification Summary**, and then **Batch Verification Summary**	View summary verification information.
Batch Verification Detail	STDNT_VERIF_DTL1	**Financial Aid**, and then **Verification**, and then **View Verification Detail**, and then **Batch Verification Detail**	View detail verification information from the Field Comparison Detail button on the Auto Verification page.

Processing Batch Consolidation

Access the Batch Consolidation page (**Financial Aid**, and then **Verification**, and then **Perform Batch Consolidation**, and then **Batch Consolidation**).

Field or Control	Description
Selection Criteria	Select *Unconsolidated* or *All Stdnts in Verification.*
Tax Consolidation Type	Select the Tax Consolidation Type you want to use. This field is active only if you do *not* select "Get Fed Data" or "Get Inst Data" for Household Verification. If you choose the Institutional Tax Consolidation Type, then the Institutional Marital Status Mapping is used. This field is display only if you use the "Get Fed Data" or "Get Inst Data" See Mapping Institutional Marital Statuses.

Viewing Batch Consolidated Tax Data

Access the Batch Consolidation Detail page (**Financial Aid**, and then **Verification**, and then **View Batch Consolidation**, and then **Batch Consolidation Detail**).

View Batch Consolidated Tax Data by clicking the **Consolidated Tax Data** link.

View Batch Non Custodial Parent Batch Consolidated Tax Data by clicking the **NC Consolidated Tax Data** link.

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The Batch Consolidated Tax Data pages are the same as the Online Consolidated Tax Data pages except that the Batch pages are view–only. Refer to the documentation about the Online pages for information about the fields on the Batch pages.

See Verifying Resource and Household Information for the 2023-2024 and Prior Aid Years.

See Verifying Resource and Household Information for the 2024-2025 and Future Aid Years.

Processing Batch Verification

Access the Batch Verification page (**Financial Aid**, and then **Verification**, and then **Perform Batch Verification**, and then **Batch Verification**).

Use the Batch Verification page to run verification for all students selected, according to the criteria that you establish.

Field or Control	Description
Verification Type	Select from these values: *Federal:* Select to apply federal setup rules to this verification. *Institutional:* Select to apply institutional setup rules to this verification.
Source	Verification is the process of comparing source data to a target set of data. This is a translate field, and translate values should not be adjusted. Select from these values: *Inst App:* Data from the Maintain Institutional Application tables *ISIR:* Data from the ISIR Data Corrections tables *Tax/Verif:* Selected data from the Application Data Verification pages created from the Consolidate routine
Target	This is a translate field, and translate values should not be adjusted. Select from these values: *Inst App:* Data from the Maintain Institutional Application tables *ISIR:* Data from the ISIR Data Corrections tables
Application Type	Values are valid with a source or target of *Inst App* only and include the following: *Inst App:* Institutional application *PROFILE:* PROFILE application *FT – CSL:* Full-time Canadian student loan *PT – CSL:* Part-time Canadian student loan
Student Selection	Select from the following values: *Both:* Processes records with a verification status of either pending or required. *Pending:* Processes records with a verification status of pending only. *Required:* Processes records with a verification status of required only.
Auto Update Target Table	Automatically updates the target table with verified data identified with a variance.

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Field or Control	Description
Set to Send ISIR Correction	Select to set the **Correction Status** to *Send* on ISIR Corrections when the Auto Update Target Table is used.
Set Verification Complete	Select to automatically set the **Verification Status** to *Complete*. This field is enabled only when the Auto Update Target table is activated.

Using Batch Verification Summary

Access the Batch Verification Summary page (**Financial Aid**, and then **Verification**, and then **View Verification Summary**, and then **Batch Verification Summary**).

The system displays **Institution, Aid Year, Process Instance, Verification Type, Date/Time, Source, User ID, Target, Students Selected, Students Skipped, Students Processed, Students Passed,Students Failed,** and Verification options selected for the run include: Auto Update Target Table, Set Verification Complete, and Set to Send ISIR Correction.

Using Batch Verification Detail

Access the Batch Verification Detail page (**Financial Aid**, and then **Verification**, and then **View Verification Detail**, and then **Batch Verification Detail**).

Results

The system displays **Pass or Fail, Tolerance, Verification Sequence, Verification Status, Variance, Verification Date, Review Status, Verification Type, User ID,** Verification options selected for the run include: Changes Applied to Target, and Set to Send ISIR Correction.

Field Comparison Detail

The system displays the most recent verification results for the listed fields. Only fields that have differences appear.

The **Done** check box is activated when the process is run with the **Auto Update Target Table** option activated. Source data comes from the source table, tax/verification, ISIR, or institutional application. Target data comes from the target table, ISIR, or institutional application. There can be a difference between the source and target information.

Managing Ability to Benefit

This section provides an overview of Ability to Benefit and discusses how to:

- Update Student Eligibility Code descriptions.
- Create and manage Ability to Benefit data at the student level.
- Create Ability to Benefit data for students in batch

Understanding Ability to Benefit

An Ability-to-Benefit test is required of students seeking United States federal financial aid who did not graduate from high school in the United States. To this end, these students must demonstrate they possess sufficient "ability to benefit" (ATB) from post-secondary education via their performance in an approved test.

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For these students, data regarding their ATB status must be reported as part of the Common Origination and Disbursement process. Oracle provides a way to create and maintain ATB data for these students.

Pages for Managing Ability to Benefit

Page Name	Definition Name	Navigation	Usage
Student Eligibility Codes	SFA_ATB_CODE_XREF	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Student Eligibility Codes**	Use this page to edit descriptions of Student Eligibility Codes in the setup table.
Manage Ability to Benefit	SFA_ATB_STDNT	**Financial Aid**, and then **Ability to Benefit**, and then **Manage Ability to Benefit**	Use this page to create and maintain Ability to Benefit data for a student.
Create Ability to Benefit	SFA_RUN_ATB	**Financial Aid**, and then **Ability to Benefit**, and then **Create Ability to Benefit**	Use this page to create and maintain Ability to Benefit data in batch.

Updating SEC Descriptions

Access the Student Eligibility Codes page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Student Eligibility Codes**).

Keyed by Institution, use this page to update descriptions in the CS-delivered Student Eligibility Codes setup table. Descriptions are limited to 55 alphanumeric characters.

These descriptions apply to COD Pell and COD Direct Loan origination awards and can be obtained through the 2015-2016 COD Technical Reference, Volume II, Section 1, Implementation Guide - Student Eligibility Fields (formerly Ability to Benefit).

The following table lists recommended Student Eligibility Code descriptions.

Student Eligibility Code	Description
01: Complete before 7/1/2012	Test Completed - First enrolled before 7/1/2012
02: College before 7/1/2012	College Credits - First enrolled before 7/1/2012
03: State Process	State Process
04: Home Schooled	Home Schooled
05: Other	Effective 10/9/2015: Invalid for all award years
06: High School Diploma	High School Diploma
07: General Ed Development	GED or State Authorized HS Equivalent Certificate
08: State-Authorized exam/cert	Effective 10/9/2015: Invalid for all award years
09: Acad Trans min 2 YR Prog	2-Year program Transcript Accepted for Credits to BA
10: Excelled in High School	Program leads to Assoc degree, excel in HS and met reqt

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Student Eligibility Code	Description
11: Complete 7/1/12 - 06/30/15	Retired Effective 23-24 Award Year
12: Complete after 7/1/12	Test Completed - First enrolled 7/1/2012 or After
13: College 7/1/12 - 6/30/15	Retired Effective 23-24 Award Year
14: College after 06/30/2015	College Credits - First enrolled 7/1/2015 or After
15: CPT Program	Comprehensive Transition and Postsecondary (CPT)

Creating and Managing Ability to Benefit

Access the Manage Ability to Benefit page (**Financial Aid**, and then **Ability to Benefit**, and then **Manage Ability to Benefit**).

Use this page to create ATB data for applicable students. This data is reported on all COD Pell origination awards to COD. Data is also reported for all COD Direct Loan origination award. Any ATB changes, based on a new sequence number, are also reported to COD with a change record.

Field or Control	Description
Sequence	Displays the sequence number of the record. This number increases by one every time a new row is inserted. A new row should only be inserted if a change to the **Ability to Benefit Code** is necessary.
Aid Year	Select the Aid Year. For COD reporting purposes: • If Aid Year is blank for the highest sequence number row, then the Student Eligibility Code for that row is used for all Aid Years. • If Aid Year is *not* blank for the highest sequence number row and: – the Aid Year for that row is *less than or equal to* the Aid Year for the process Run Control, then the Student Eligibility Code for that row is used for the process. – the Aid Year for that row is *greater than* the Aid Year for the process Run Control , then the process searches for the *next* highest sequence row, and repeats the above logic until a sequence row is selected to be used in processing. **Note:** Specifying an Aid Year allows you to designate different Student Eligibility Codes by Aid Year. For example, you may wish to take advantage of a new (expanded) code in a new Aid Year when it was not available in an earlier Aid Year.

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Field or Control	Description
Stdnt Eligibility Code (student eligibility code)	Select the value that indicates how the student achieved the ATB. Select from the ATB codes established in the Student Eligibility Codes crosswalk table setup. When a code is selected, its description appears. **Note:** The**Ability to Benefit Code** drives the remaining field edits to ensure the correct 'set' of data is populated for COD reporting requirements. All other changes should be made directly to field element.
Test Administrator Code	Select the administrator code of the ATB testing.
Test Code	Select which ATB test was taken by the student.
State Code	Select the state in which the student completed the State Process to achieve ATB.
Completion Date	Enter the date that the student completed the ATB test or State Process.
Comment	Enter optional explanatory comments. This information is not shared with COD.

Creating Ability to Benefit Data in Batch

Access the Create Ability to Benefit page (**Financial Aid**, and then **Ability to Benefit**, and then **Create Ability to Benefit**).

Population Selection

Use this page to create Ability to Benefit data for students in batch using standard Population Selection functionality.

Field or Control	Description
Selection Tool	Select from *Equation Engine, PS Query,* or *External File.* Additional parameters are displayed for your selected tool. System data is available in Population Selection Context Definition SFA_ATB.
Query Name	This field is only available the *PS Query* **Selection Tool** is selected. Select a population selection query that joins with the bind record SFA_ATB_BIND.

Default Values

If any of the following fields come in from **Population Selection** with blanks then use the value from the run control to populate the Ability to Benefit record.

Field or Control	Description
Institution	Enter the academic institution that the student is attending during the aid year.

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Field or Control	Description
Aid Year	Select the Aid Year. For COD reporting purposes: • If Aid Year is blank for the highest sequence number row, then the Student Eligibility Code for that row is used for all Aid Years. • If Aid Year is *not* blank for the highest sequence number row and: – the Aid Year for that row is *less than or equal to* the Aid Year for the process Run Control, then the Student Eligibility Code for that row is used for the process. – the Aid Year for that row is *greater than* the Aid Year for the process Run Control , then the process searches for the *next* highest sequence row, and repeats the above logic until a sequence row is selected to be used in processing. **Note:** Specifying an Aid Year allows you to designate different Student Eligibility Codes by Aid Year. For example, you may wish to take advantage of a new (expanded) code in a new Aid Year when it was not available in an earlier Aid Year. If the Aid Year value is specified on this Run Control, it populates the ATB record for all Population Selection cohorts whose Aid Year value is blank.
Stdnt Eligibility Code (student eligibility code)	Select from the ATB codes established in the Student Eligibility Codes crosswalk table setup. When a code is selected, its description appears. Entering a default value is optional, however if blank, then the data retrieved from Population Selection must indicate an ATB Code value.
Test Administrator Code	Optional. Enter the ATB Test Administrator Code.
Test Code	Optional. Enter ATB **Test Code**
State Code	Optional. Enter the **State Code** if ATB Code is equal to '03:State Process'.
Completion Date	Enter the **Completion Date** of the ATB test.

> **Note**
>
> Ability to Benefit—related field values are based on the most current COD Technical Reference material.

Using NSLDS Data and Processes

This section provides an overview of NSLDS data and processes and discusses how to:

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- Generate Financial Aid History or Transfer Student Monitoring Inform file requests.
- Load Financial Aid History and Transfer Student Monitoring files.
- Set up NSLDS Data Load Parameters.
- Process NSLDS Files.
- Use NSLDS Suspense Management.
- Generate NSLDS FAT Load Error Reports.
- Use NSLDS Change Review.
- Process NSLDS Alert File information.
- Review NSLDS general aggregate information.
- View details of NSLDS aggregate data
- View NSLDS Pell information.
- View NSLDS Academic Competitiveness Grant (ACG) details.
- View NSLDS National SMART grant (NSG) details.
- View NSLDS TEACH grant details.
- View NSLDS IASG grant details.
- View NSLDS additional information.
- Use the NSLDS Data Push Process

Understanding NSLDS Data and Processes

The National Student Loan Data System (NSLDS) is a central database operated by the Department of Education to track student aid information. The NSLDS database is updated with information from schools, agencies that guaranty loans, the Direct Loan program, the Pell Grant program and other Department of Education programs. Schools use the NSLDS data to determine aid eligibility based on past and current awards.

Schools can receive NSLDS data in the following ways:

- School submits a Financial Aid History (FAH) Inform request.

  If requested, NSLDS sends a file that contains the student's full NSLDS Financial Aid History.

- School submits a Transfer Student Monitoring (TSM) Inform request.

  If requested, NSLDS monitors students for changes affecting student eligibility not covered by the ISIR post-screening process. If eligibility changes are detected, NSLDS sends an Alert file which contains the student's full NSLDS Financial Aid History with the appropriate alert change flags.

- Limited NSLDS data is also part of the Institutional Student Information Record (ISIR).

Oracle provides a process to generate the FAH/TSM Inform (request) file to send to the NSLDS. Additionally, once a FAH/Alert file is received, options are available to load and manage the NSLDS data through use of suspense management, processes and reports. You can view loaded NSLDS data by using the NSLDS Inquiry components.

To use NSLDS data in the Awarding and Packaging processes, NSLDS must be loaded, pushed to aggregate aid tables, and the Packaging process must be directed to use NSLDS as an aggregate source to assess how much aid had been used towards lifetime limits.

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Pages Used to Review and Process NSLDS Data

Page Name	Definition Name	Navigation	Usage
NSLDS Request	SFA_RUN_NSLDS_OUT	**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Process NSLDS Request**, and then **NSLDS Request**	Generate an NSLDS Inform file containing requests for either Financial Aid History, Transfer Student Monitoring or both.
FA Inbound	RUNCTL_FAT_INBOUND	**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**	Load the NSLDS Financial Aid History and Alert files into the NSLDS staging tables.
NSLDS Data Load Parameters	SFA_NSLDS_LD_CNTRL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **NSLDS Data Load Parameters**, and then **NSLDS Load Options tab**	Configure the load parameters for processing NSLDS data from the staging tables to the application tables.
NSLDS Search/Match	SFA_NSLDS_SRCHMCH	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **NSLDS Data Load Parameters**, and then **NSLDS Search/ Match tab**	Define the Search/ Match parameters for processing NSLDS data from the staging tables to the application tables.
Process NSLDS Files	RUNCTL_FAPTALRT	**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Process NSLDS Files**, and then **Process NSLDS Files**	Load NSLDS data from the staging tables to the application tables.
NSLDS Suspense Management	NSLDS_SUSP_CNTRL	**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Manage NSLDS Records**, and then **NSLDS Suspense Management**	View NSLDS records that have been loaded into the staging tables by the FA Inbound process. Once the Process NSLDS Files process runs, review NSLDS records that were not loaded into the application tables.

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Page Name	Definition Name	Navigation	Usage
NSLDS FAT Load Error Report	RUNCTL_FA921	**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **NSLDS FAT Load Error Report**	Create a report listing all NSLDS records that failed to load to the application tables. These records have a Load Status of Suspended or Error.
NSLDS Change Review	NSLDS_CHANGE_RVW	**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Review NSLDS Flagged Students**, and then **NSLDS Change Review**	Review all NSLDS Alert file records that have been loaded into the application tables. After student NSLDS information has been reviewed, use this page to indicate that you have reviewed and resolved any student aid eligibility discrepancies.
NSLDS Information	NSLDS_GEN_AGGR	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Information**	View error codes, change flags, MPN flags, and alert file flags.
NSLDS Overpayment Information	NSLDS_CONTCT_SEC	Click the **Overpayment Information** link on the NSLDS Information page.	View loan overpayment and contact information for Pell, Perkins, and SEOG.
NSLDS Detail	NSLDS_ERR_CD_SEC	Click the **Detail** link on the NSLDS Information page.	View NSLDS error codes, change flags, master promissory note flags, and alert file flags for the effective-dated row.
NSLDS Loan Detail	NSLDS_LOAN_DTL	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Loan Detail**	Review detailed information for every federal loan that the student has received.
NSLDS Pell	NSLDS_PELL	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Pell**	Review a summary of a student's last three Pell awards.
NSLDS ACG	NSLDS_ACG	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS ACG**	View details for Academic Competitiveness Grants.
NSLDS NSG	NSLDS_NSG	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS NSG**	View details for National SMART Grants.

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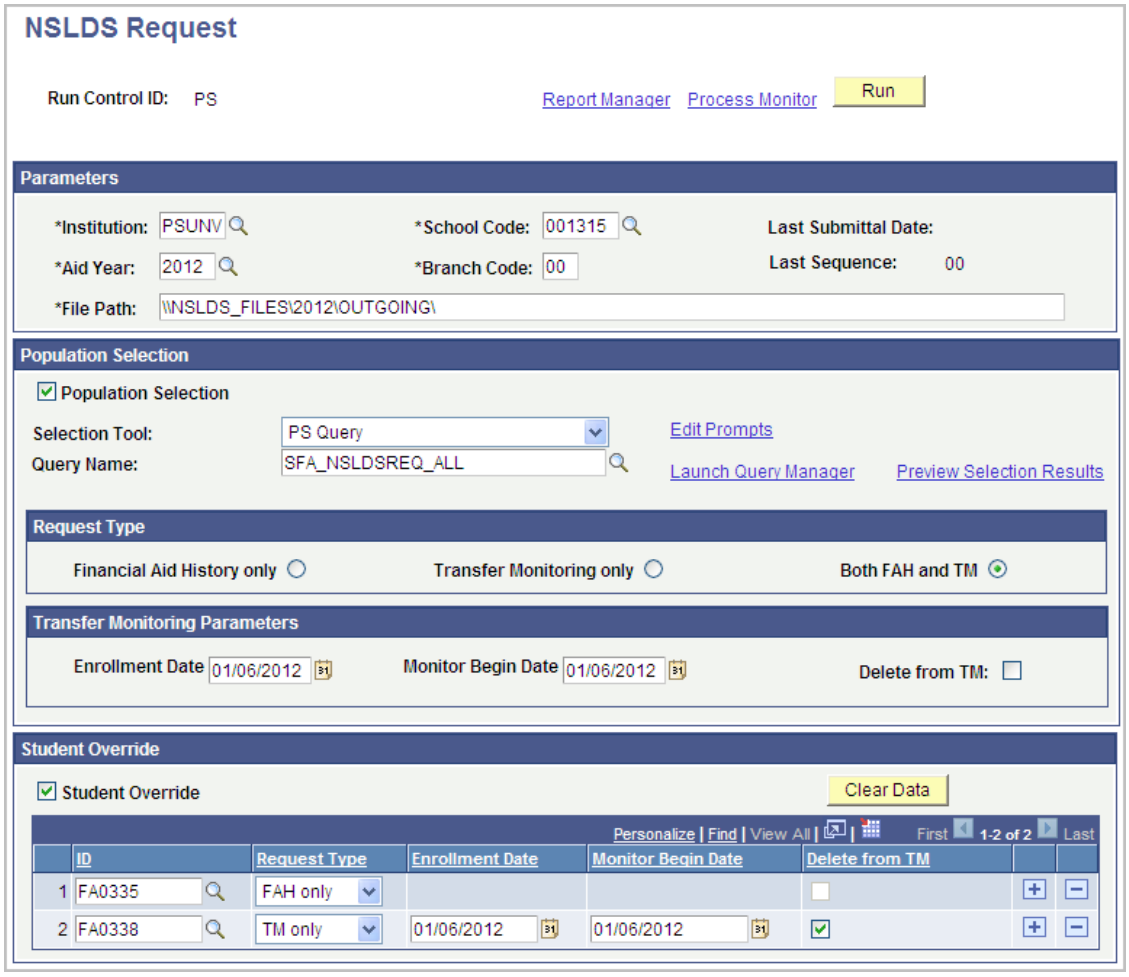
Page Name	Definition Name	Navigation	Usage
NSLDS TEACH	NSLDS_TEACH	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS TEACH**	View details for TEACH Grants.
NSLDS IASG	NSLDS_IASG	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS UASG**	View details for IASG Grants.
NSLDS Additional Information	NSLDS_ADDL_INFO	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Additional Information**	Review overpayment information or name history.
NSLDS Activity	NSLDS_ERR_CD_SEC	**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data. Click the Detail link on any page in the component.**	View NSLDS activity and change flags.
NSLDS Data Push	SFA_RUN_NSLDS_UPDT	**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Update Aggregates with NSLDS**, and then **NSLDS Data Push**	Run the Update Aggregates with NSLDS as an independent process to push NSLDS totals into the aggregate aid tables to be used by the Packaging process.

Generating Financial Aid History or Transfer Student Monitoring Inform File Requests

Access the NSLDS Request page (**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Process NSLDS Request**, and then **NSLDS Request**).

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

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Use the NSLDS Request page to generate an NSLDS Inform file to request Financial Aid History (FAH), add or remove students to the Transfer Student Monitoring (TSM) list or both.

> **Note**
>
> Before submitting your first Batch Inform file for the TSM process, you must establish a School Transfer Profile on the NSLDS FAP website. If the School Transfer Profile is not set up, the entire Batch Inform file is rejected.

Parameters

Field or Control	Description
School Code	Enter a valid six digit ED School Code
Branch Code	Enter a valid two digit ED Branch Code, if applicable. If left blank, value defaults to "00".

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> **Note**
>
> The School and Branch Codes used here indicate the 'informing' school when generating the NSLDS Inform file. NSLDS sends the FAH/Alert files back to the 'informing' school and includes these codes within the files.

Population Selection

Field or Control	Description
Population Selection	Select this check box to access population selection options. If not selected, the process attempts to process Student Overrides. If **Student Override** is not selected either, the run parameters can be saved and the process run, but no file is created. See Campus Community Fundamentals: Using the Population Selection Process.
Query Name	Select a PS Query that uses the *SFA_NSLDS_QRYVW* bind record.
Equation Name	Select an equation that is defined with the application prompt *NSLDS Request Process.*
Financial Aid History only	Select to request a FAH file.
Transfer Monitoring only	Select to request to add or remove students from the TSM list.
Both FAH and TM	Select to request a FAH file and to add or remove students from the TSM list.

> **Note**
>
> The **Enrollment Date, Monitor Begin Date** and **Delete from TM** options are only used for Transfer Monitoring requests and are therefore only displayed if a **Request Type** of **Transfer Monitoring Only** or **Both FAH and TM** is selected.

Field or Control	Description
Enrollment Date	Enter the begin date for the period of enrollment. This date can be a future date, but not more than 18 months greater than the current date. Also, it cannot be more than 90 days less than the current date.
Monitor Begin Date	Enter the date when monitoring should begin. This date can be a future date, but not greater than the enrollment date. If the enrollment date has already passed, the submittal date (current date) is the default.
Delete from TM	Select to remove the selected population from the TSM list. This option should only be selected for students who were previously added to the TSM list but are not going to attend your institution.

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Student Override

Field or Control	Description
Student Override	Select this check box to access student override options. You can use the Student Override function to enter student IDs individually for inclusion in the Inform file. Select the Request Type, Enrollment Date, Monitor Begin Date and Delete from TM options for each row. These options work the same as described in the Population Selection section. **Note:** You can use the Student Override option in conjunction with the Population Selection option. If you use both features, the student override function processes first. If duplicate IDs exist in the student override function and the population selection function, only one row is inserted using the student override information.

Related Topics

- Defining Item Type Disbursement Rules
  To set up item type disbursement rules, use the Define Item Type Rules (DISB_RULE_ITEM) component.

Loading Financial Aid History and Transfer Student Monitoring Files

Access the FA Inbound page (**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**).

Use the FA Inbound page to load Financial Aid History and Alert files into the NSLDS staging tables.

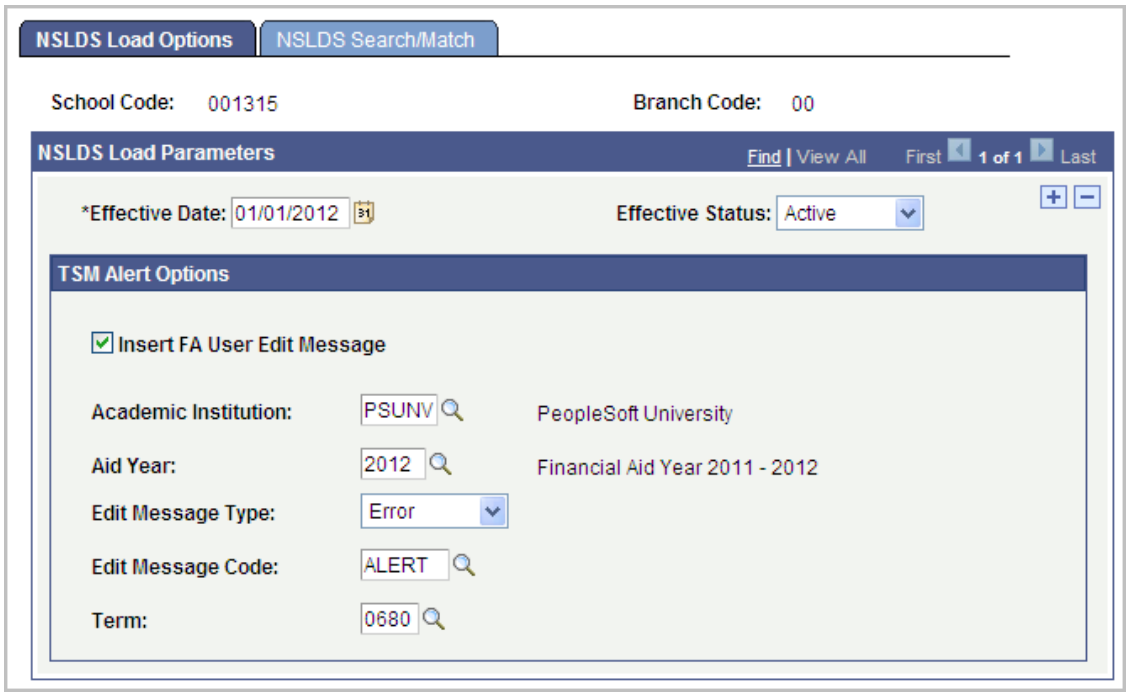
Field or Control	Description
Run Option	Select **Single File** to enter a single file location or **File List** to indicate a list of files in the **Inbound File** field.
Inbound File	Enter the name and location of the NSLDS file that you want to load into the staging tables. Be sure that the server has read access rights to the location of the file.
ISIR TG Number	Assign the ISIR TG number for the ISIRs that are loaded. When processing a file list, the system assigns the same TG number to all ISIRs in the list. This value is not used when loading NSLDS files.

Setting Up NSLDS Data Load Parameters

Access the NSLDS Data Load Parameters page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **NSLDS Data Load Parameters**, and then **NSLDS Load Options tab**).

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This example illustrates the fields and controls on the NSLDS Load Options page. You can find definitions for the fields and controls later on this page.



Use the NSLDS Data Load Parameters page to setup options for processing NSLDS data from the staging tables to the application tables, either in batch or online. Data load parameters must be setup for each separate School/Branch Code combination you plan to process.

Field or Control	Description
Insert FA User Edit Message	Select this check box to insert FA User Edit messages. Checking this box opens the **Aid Year, Institution, Edit Message Type, Edit Message Code,** and **Term** fields for input. **Note:** This option only allows insertion of FA User Edit Messages for Alert records. FA User Edit messages are *not* inserted when FAH records are processed. If you wish to insert FA User Edit Messages for FAH records, please use the stand-alone FA User Edit Message assignment process.
Aid Year	Select the valid aid year for the current Transfer Monitoring process.
Institution	Select the institution for which you want to enter a user edit message.
Edit Message Type	Select Error, Informtnal (informational), or Warning.
Edit Message Code	Select the edit message code to be entered for the student. The available codes are restricted based on the **Edit Message Type** selected.
Term	Select the term for which the user edit message is to become active.

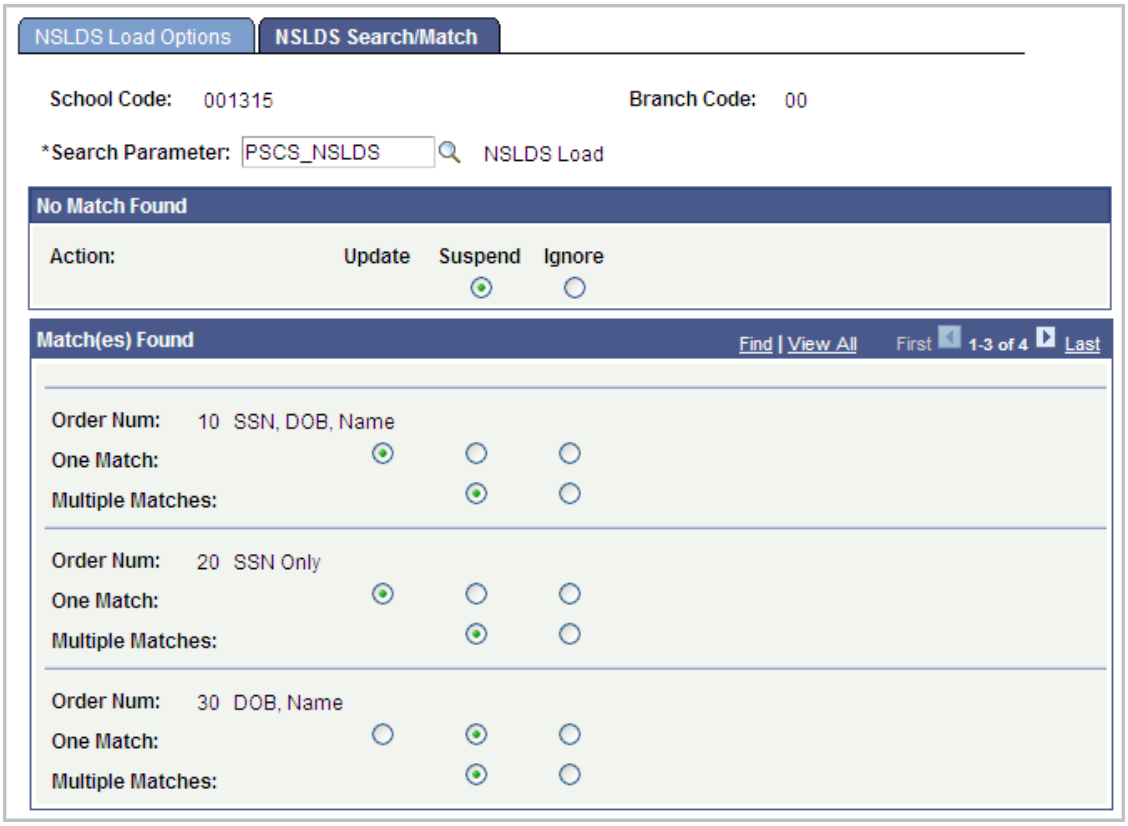
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> **Note**
>
> You must setup FA User Edit Messages to support this process.

See Defining User Edit Messages.

Access the NSLDS Search/Match page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **NSLDS Data Load Parameters**, and then **NSLDS Search/Match tab**).

This example illustrates the fields and controls on the NSLDS Search/Match page. You can find definitions for the fields and controls later on this page.



Use this page to define the Search/Match parameters when processing NSLDS data from the staging tables to the application tables. Select which action to take when No Match, a Single Match or Multiple Matches are found.

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Field or Control	Description
Search Parameter	Select the search parameter to be used for NSLDS Search/Match **Note:** You are advised to setup a **Search Parameter** specifically for NSLDS. Unlike ISIR and Profile, NSLDS only has a handful of fields available to use for Search/Match: First Name, Last Name, Date of Birth, and Social Security Number.
No Match Found	Select the action, *Suspend* or *Ignore,* to take when no match is found for a record during Search/Match.
Match(es) Found	The Search Parameter value entered above determines which levels are displayed. For each level, select the action to take when One Match or Multiple Matches are found. Select *Update* (only available when one match is found), *Suspend* or *Ignore.*

Understanding the Process NSLDS Files Logic

The **Process NSLDS Files** process selects all records from the NSLDS staging table with a **Load Status** of *Unprocessed* or *Suspended.* The program attempts to match each selected NSLDS record with a student in the database using the Search/Match settings configured on the NSLDS Data Load Parameters page.

If Search/Match finds a single match and the parameters are set to *Update,* the NSLDS data loads to the application tables, the **Load Status** is set to *Loaded* and the data can be viewed in the NSLDS Inquiry component. The loaded NSLDS information also updates the student's NSLDS Match field on the Packaging Status Summary/Database Match page. If a student has previously been reported in Default or Overpayment, the status is reset to Eligible if the new NSLDS information confirms the status. Conversely, a current status of Eligible can also be reset to Default or Overpayment if the new NSLDS data confirms the status.

If Search/Match finds no match, multiple matches or a single match and the parameters are NOT set to *Update,* the **Load Status** is either set to *Suspended* or *Skipped,* depending on the Search/Match settings. The NSLDS record can also be *Suspended* if the Transaction Process Date on the incoming data is older than the current Effective Date on the NSLDS application tables. Use the NSLDS Suspense Management page to review *Suspended* and *Skipped* records and attempt to get them loaded.

Processing NSLDS Files

Access the Process NSLDS Files page (**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Process NSLDS Files**, and then **Process NSLDS Files**).

Use the Process NSLDS Files page to load the FAH/Alert data from the staging tables to the application tables. When NSLDS files are loaded through the FA Inbound process, the 6-digit school code and 2-digit branch code from the files are identified. The options on this page allow you to process all School/Branch Codes found on the staging tables or elect to only process certain ones.

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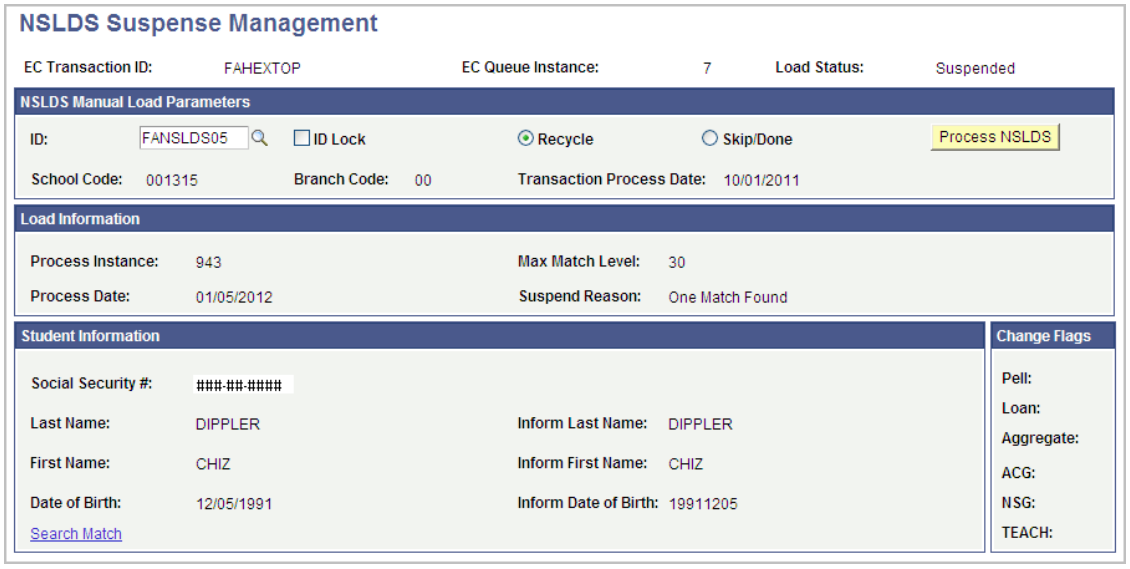
Field or Control	Description
All School/Branch Codes	Selecting this option processes the NSLDS data on the staging tables for ALL School/Branch Code combinations.
School/Branch Code Override	Selecting this option only processes the NSLDS data in the staging tables for the School/Branch Code(s) entered in the **School/Branch Code Override** grid.
School Code	Enter a valid six digit ED School Code. Use the lookup button to search for valid school codes on the NSLDS Staging tables.
Branch Code	Enter a valid two digit ED Branch Code. Use the lookup button to search for valid branch codes on the NSLDS Staging tables.

> **Note**
>
> A warning message appears if the selected School/Branch Code combination does not have an associated NSLDS Data Load Parameters setup.

Using NSLDS Suspense Management

Access the NSLDS Suspense Management page (**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Manage NSLDS Records**, and then **NSLDS Suspense Management**).

This example illustrates the fields and controls on the NSLDS Suspense Management page. You can find definitions for the fields and controls later on this page.



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The system displays the **EC Transaction ID** (electronic commerce transaction ID) and **EC Queue Instance.** The valid EC Transaction ID values are FAHEXTOP (Financial Aid History file) and TRALRTOP (Alert file).

Field or Control	Description
Load Status	The system displays one of these values: *Error*: An error occurred while trying to process this record from the staging tables. Records with this status are not picked up by the batch process. Refer to the **Error Code** description below. *Loaded*: The record successfully loaded from the NSLDS staging tables into the application tables. *Skipped*: This status is either set manually on the Suspense Management page or by the batch process when Search/Match parameters are set to 'Ignore'. Records with this status are not picked up by the batch process. Refer to the **Skip Reason** description below. *Suspended*: The record did not load into the application tables because it did not meet the NSLDS load parameters. Records with this status are picked up by the batch process. Refer to the **Suspend Reason** description below. *Unprocessed*: The FA Inbound process loaded the record loaded into the NSLDS staging tables, but the Process NSLDS Load process has not yet been run for the record. Records with this status are picked up by the batch process.

NSLDS Manual Load Parameters

Field or Control	Description
ID	For records with a **Load Status** of *Loaded,* this field shows which ID the NSLDS data was loaded to. For records with a **Load Status** of *Skipped* or *Suspended,* the **ID** field may be blank or populated with one of the Search/Match results. For records with a **Load Status** of *Suspended* or *Unprocessed* records, you can use this field in conjunction with the **ID Lock** check box to manually match an ID to incoming NSLDS data.
ID Lock	Select to match the *Suspended* or *Unprocessed* NSLDS record to the specified **ID.** This works in conjunction with the **ID** field. In order to use the **ID Lock** option, the **ID** field MUST be populated. Using this option essentially bypasses Search/Match the next time this record is processed. Although Search/Match is bypassed, the record must still meet the other NSLDS Data Load Parameters in order to load to the application tables.

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Field or Control	Description
Recycle	This is set by the NSLDS load process if a student's NSLDS record cannot be loaded into the application tables because it does not meet the NSLDS Data Load Parameters.
Skip/Done	This is set by the system when the NSLDS record has been loaded to the application tables or if the record has been skipped/ignored (either manually or by the batch routine). To manually set the **Load Status** to *Skipped,* select this radio button and click the Process NSLDS button.
Process NSLDS	Click this button to perform the selected action: *Recycle* or *Skip/Done.*
School Code	Displays the School Code value reported in the NSLDS file.
Branch Code	Displays the Branch Code value reported in the NSLDS file.
Transaction Process Date	Displays the date when NSLDS generated the incoming NSLDS data.

Load Information

Field or Control	Description
Process Instance	Displays the most recent process instance of when this record was processed through the batch load routine.
Process Date	Displays the most recent process date of when this record was processed through the load routine (either online or through the batch routine).
Max Match Level	Displays the Search/Match level at which the NSLDS record was matched to an ID.

> **Note**
>
> Records with a **Load Status** of *Error, Suspended* or *Skipped* have an associated reason or code displayed. No reason or code is displayed for records having a **Load Status** of *Unprocessed* or *Loaded*.

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Field or Control	Description
Suspend Reason	Displays the reason the record was suspended and not loaded into the application tables. • *Data Load Parameters not found*: Data Load Parameters were not found for the School/ Branch code combination on this NSLDS record. • *Effective Date Conflict*: The record passed Search/Match but the Transaction Process Date is older than the student's current Effective Dated row in the NSLDS application tables. • *Multiple Matches Found*: Search/Match found multiple matches and the action in NSLDS Data Load Parameters is set to 'Suspend' for the designated Search/Match level. If multiple matches were found, the **ID** field is blank. • *No Match Found*: Search/Match found no matches and the No Match Found action in NSLDS Data Load Parameters is set to 'Suspend'. • *One Match Found*: Search/Match found one match and the action in NSLDS Data Load Parameters is set to 'Suspend' for the designated Search/Match level. If one match was found, the ID field is populated.
Skip Reason	Displays the reason the record is skipped and not loaded into the application tables. • *Manually set to Skip*: The user manually set this record to Skip/Done on the NSLDS Suspense Management page. • *No Match Found*: Search/Match found no matches and the No Match Found action in NSLDS Data Load Parameters is set to 'Ignore'. • *Multiple Matches Found*: Search/Match found multiple matches and the action in NSLDS Data Load Parameters is set to 'Ignore' for the designated Search/Match level. If multiple matches were found, the ID field is blank. • *One Match Found*: Search/Match found one match and the action in NSLDS Data Load Parameters is set to 'Ignore' for the designated Search/Match level. If one match was found, the ID field is populated.
Error Code	Displays the reason the record was set to Error and not loaded into the application tables. *Invalid SSN Encountered*: The SSN on this record is outside the valid range (001010001 – 999999999).

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Student Information

Field or Control	Description
Social Security #	Displays the student's current SSN maintained by the NSLDS and reported in the FAH/Alert files.
Last Name	Displays the student's current last name maintained by the NSLDS and reported in the FAH/Alert files.
First Name	Displays the student's current first name maintained by the NSLDS and reported in the FAH/Alert files.
Date of Birth	Displays the student's current birth date maintained by the NSLDS and reported in the FAH/Alert files.
Inform Last Name	Displays the last name reported by the institution in the NSLDS Inform file or online. This information is returned to the school in the FAH/Alert file.
Inform First Name	Displays the first name reported by the institution in the NSLDS Inform file or online. This information is returned to the school in the FAH/Alert file.
Inform Date of Birth	Displays the date of birth reported by the institution in the NSLDS Inform file or online. This information is returned to the school in the FAH/Alert file.

Change Flags

Field or Control	Description
Change Flags	These flags are only populated on Alert files and indicate where changes have been detected on the student's NSLDS record which may affect eligibility. Valid values are *Y*: Yes and *N*: No. These fields are blank for FAH files.

Generating NSLDS FAT Load Error Reports

Access the NSLDS FAT Load Error Report page (**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **NSLDS FAT Load Error Report**).

Use this page to generate the NSLDS FAT Load Error Report. This report shows records from the staging tables that have a **Load Status** of *Suspended* or *Error.* Review the records on this report, and using the Suspense Management page, either attempt to get the record *Loaded* or set the record to *Skipped.*

This page has no run control options. Click the **Run** button to generate the report. The Process Scheduler runs the NSLDS FAT Load Errors query (FA921) and creates a report.

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> **Note**
>
> Oracle also delivers the FA921A query that is a clone of the NSLDS FAT Load Error Report but includes School Code and Branch Code information. You must run this query directly through the PS Query component.

Using NSLDS Change Review

Access the NSLDS Change Review page ((**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Review NSLDS Flagged Students**, and then **NSLDS Change Review page**).

Use the NSLDS Change Review page to review Alert records that have been loaded into the application tables.

NSLDS Alert files contain change flags that indicate recent changes detected on the student's NSLDS record that may affect eligibility. These changes must be reviewed before Federal funds can be disbursed to the student. Once the Alert files have been received and loaded into the application tables, use this page to identify all records needing review. The contents of this page match the records captured on the NSLDS Alert File report. Once the records have been reviewed and any necessary award adjustments made, mark them as *Reviewed* on this page to remove them from displaying on this page again.

Field or Control	Description
Reviewed	Select to indicate that you reviewed the changes to the student's NSLDS information and completed any adjustments to the student's current financial aid eligibility. Selecting this check box removes the record from this page the next time the page is accessed. Also, the record is removed from the NSLDS Alert File Report.
Queue Inst (queue instance)	Indicates when the record was loaded. The system generates a unique sequential queue instance number for each NSLDS Alert file loaded. A greater value indicates a more recently loaded file.
School Code	Displays the School Code value reported in the NSLDS file.
Branch Code	Displays the Branch Code value reported in the NSLDS file.
Change Flags	These indicate where changes have been detected on the student's NSLDS record which may affect eligibility. Valid values are *Y*: Yes and *N*: No.
Awards	Click this link to access the Award Summary and Award Term Summary pages.
Loans	Click this link to access the Origination Student Summary page.
NSLDS	Click this link to access the NSLDS Information page.

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Processing NSLDS Alert File Information

The following steps describe how you can implement the NSLDS Transfer Student Monitoring process using the applications provided. Each institution, however, should implement the process based on their specific business requirements.

To run the Transfer Student Monitoring process:

1. Contact NSLDS to establish your transfer monitoring profile and elect to receive NSLDS Alert files in extract format.
2. Use the NSLDS Request process to generate the NSLDS Inform file of the transfer students that you want monitored for eligibility changes. You can also request monitoring online at www.NSLDSFAP.ed.gov.

   > **Note**
   >
   > Institutions may want to assign a checklist, service indicator, or financial aid user edit message to ensure that disbursements are suspended until the monitoring process is completed.

3. Receive an Alert file.

   a. Use the FA Inbound page to load the Alert file into the staging tables. Use the Review CPS/FPS/NSLDS Transactions page to confirm the file (Transaction ID: TRALRTOP) was successfully loaded.

   b. Use the Process NSLDS Files program to load the data from the staging tables into the application tables. View the loaded data in the NSLDS Inquiry component. Use the NSLDS Suspense Management page to review records that failed to load to the application tables.

   > **Note**
   >
   > Financial Aid User Edit Messages can be assigned by the Process NSLDS Files program which can be used to suspend the authorization and disbursement of funds for a specific term. See NSLDS Data Load Parameters.

4. Review and resolve various load error messages.

   The Process NSLDS Files program uses the settings on the NSLDS Data Load Parameters page to load the incoming NSLDS data to a matching record within the database. Use the NSLDS FAT Load Errors report and NSLDS Suspense Management page to manage records that failed to load to the application tables.

5. Review Alert file records for possible changes in financial aid eligibility.

NSLDS Alert files contain change flags that indicate recent changes detected on the student's NSLDS record that may affect eligibility. These changes must be reviewed before Federal funds can be disbursed to the student. Once the Alert files have been received and loaded into the application tables, use the NSLDS Alert File report and NSLDS Change Review page to identify all records needing review. Once the records have been reviewed and any necessary award adjustments made, mark them as *Reviewed*. If a checklist, service indicator, or financial aid user edit message was used to suspend disbursement of funds, update the appropriate statuses at this time.

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For more information, see the National Student Loan Data System (NSLDS) Transfer Student Monitoring/Financial Aid History Processes and Batch File Layouts.

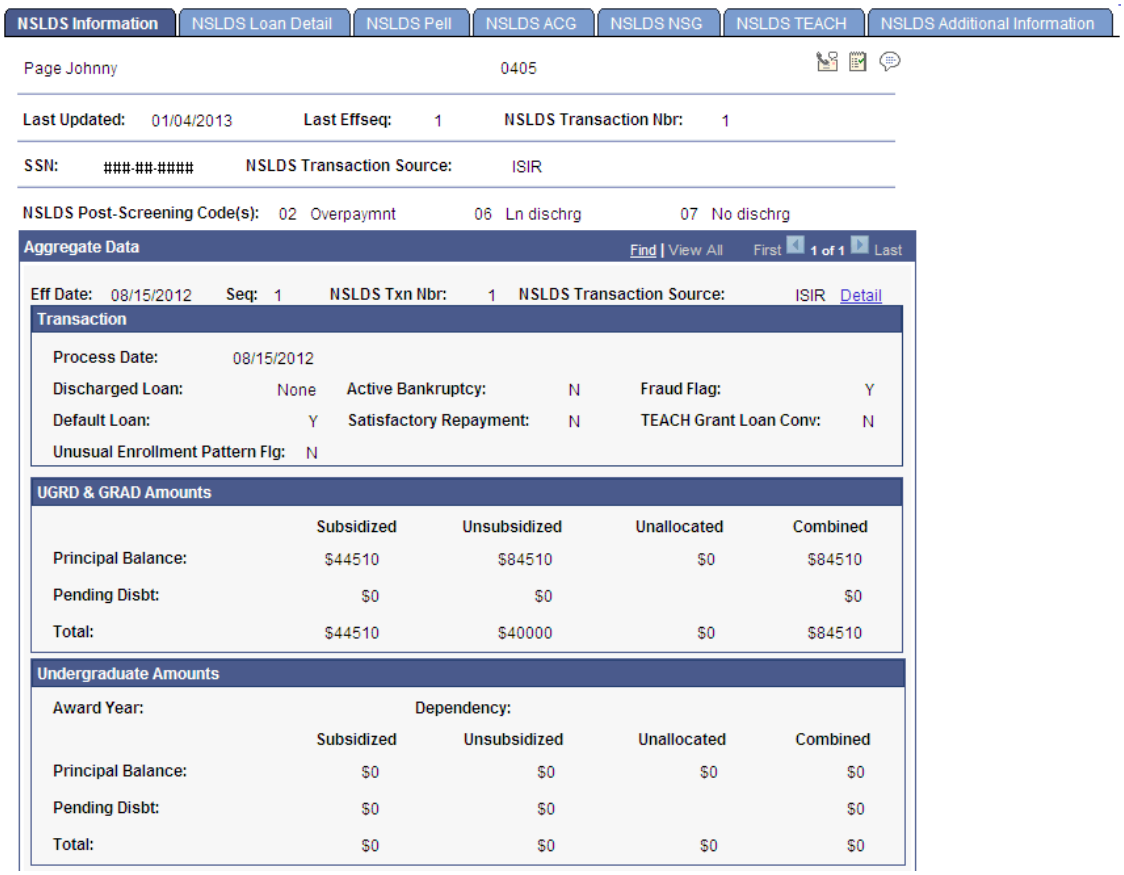
Related Topics

- Defining Basic Global Rules for Authorization
  Access the Disbursement Rules: Global - Indicators page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Global Rules**, and then **Indicators**).

Reviewing NSLDS General Aggregate Information

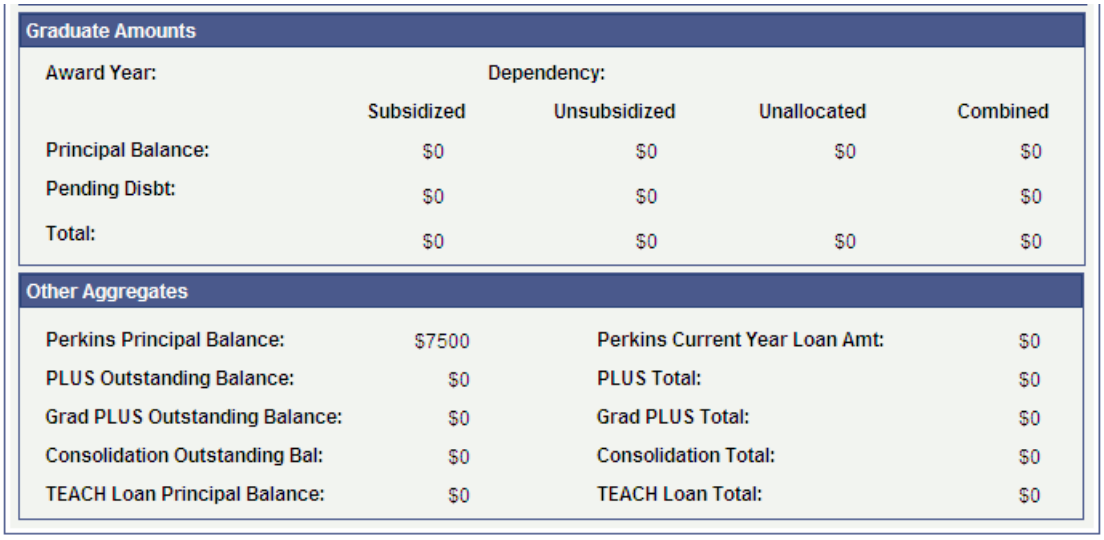
Access the NSLDS Information page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Information**).

This example illustrates the fields and controls on the NSLDS Information page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the NSLDS Information page (2 of 2). You can find definitions for the fields and controls later on this page.

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Graduate Amounts

Award Year:	Dependency:			
	Subsidized	Unsubsidized	Unallocated	Combined
Principal Balance:	$0	$0	$0	$0
Pending Disbt:	$0	$0		$0
Total:	$0	$0	$0	$0

Other Aggregates

Perkins Principal Balance:	$7500	Perkins Current Year Loan Amt:	$0
PLUS Outstanding Balance:	$0	PLUS Total:	$0
Grad PLUS Outstanding Balance:	$0	Grad PLUS Total:	$0
Consolidation Outstanding Bal:	$0	Consolidation Total:	$0
TEACH Loan Principal Balance:	$0	TEACH Loan Total:	$0

If you choose to push aggregate totals to the aggregate aid tables for direct use by the Packaging and Awarding process, the subsidized and unsubsidized aggregate totals under the **UGRD & GRAD Amounts** section, Perkins principal balance, and Grad PLUS Outstanding Balance are pushed to the corresponding aggregate areas for this student.

Field or Control	Description
Overpayment Information	Click this link to access NSLDS overpayment details The link appears when federal overpayment information exists.

Aggregate Data

Field or Control	Description
Eff Date (effective date)	Displays the effective date of the loaded aggregate information. Aggregate data is the loan history. There can be a date for an ISIR and multiple sequences. You can view loans that are in default, discharged loans, or active bankruptcies.
NSLDS Txn Nbr (NSLDS transaction number)	Displays the transaction number of the NSLDS data from the NSLDS. As the student's financial aid history is updated by the NSLDS, the transaction number moves upward one increment. If new NSLDS information is received by a school that has a lower transaction number than the current data, the new information does not load. The system assumes that the current information is more recent.
NSLDS Transaction Source	Displays the source of the loaded NSLDS information. Values are: *ISIR, Alert* (NSLDS Transfer Alert file), and *FA History.*

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Transaction

Field or Control	Description
Process Date	Displays the process date for the transaction. If the data source is the ISIR, this date is the CPS/FPS process date of the ISIR. If the data source is the NSLDS FAT file, the date used is the NSLDS file process date.
Discharged	Indicates whether a student's defaulted loan has been discharged. The values for the field are *Y* (yes) or *N* (no).
Default	Displays whether the transaction is in default.
Active Bankruptcy (active bankruptcy)	Displays whether the loan is part of an active bankruptcy proceeding.
Satisfactory Repayment (satisfactory repayment)	Indicates whether the loan has been repaid satisfactorily.
Fraud	Identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.
TEACH Grant Loan Conv	Indicates whether a TEACH Grant has been converted to a loan on one or more grant records.
Unusual Enrollment Pattern Flg	Displays whether the transaction has unusual enrollment patterns. The values for the field are: • *1* = For Federal Student Aid use only. • *2* = Possible enrollment pattern problem, school may need to resolve. • *3* = Questionable enrollment pattern, school must resolve. • *N* = Enrollment pattern not unusual, no school action required. • Blank = Record not sent for match.
Loan Limit Exception Flag	Identifies whether the borrower is grandfathered under the aggregate loan limits prior to the 2026–27 award year or is subject to the new aggregate loan limits beginning with the 2026–27 award year, as reported by COD.
Loan Limit Exception Disb Date Loan Limit Exception Disbursement Date	Identifies that the borrower has a loan with a disbursement date on or after July 1, 2026.

UGRD/GRAD

This section displays combined amounts for undergraduate and graduate loans.

Field or Control	Description
Principal Balance	Displays FFELP/FDLP aggregate loan information in **Subsidized, UnSub** (unsubsidized), **Combined,** and **Consolidated** categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.

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Field or Control	Description
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the **Subsidized, UnSub** (unsubsidized), **Combined,** and **Consolidated** categories.

Undergraduate Amounts

This section displays amounts for undergraduate loans.

Field or Control	Description
Award Year	Displays the **Award Year** used in the student's undergraduate loan limits determination.
Dependency	Displays the **Dependency** status used in the student's undergraduate loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in **Subsidized, UnSub** (unsubsidized), **Combined,** and **Consolidated** categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the **Subsidized, UnSub** (unsubsidized), **Combined,** and **Consolidated** categories.

Pre-OB3 (One Big Beautiful Bill) Grad/Prof Amounts

This section displays amounts for graduate loans.

Field or Control	Description
Award Year	Displays the **Award Year** used in the student's graduate/professional loan limits determination.
Dependency	Displays the **Dependency** status used in the student's graduate/professional loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in **Subsidized, UnSub** (unsubsidized), **Combined,** and **Consolidated** categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the **Subsidized, UnSub** (unsubsidized), **Combined,** and **Consolidated** categories.

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Graduate Amounts

Field or Control	Description
Award Year	Displays the award year used in the student's graduate loan limits determination.
Dependency	Displays the dependency status used in the student's graduate loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in aggregate and consolidated categories.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the aggregate and consolidation categories.

Professional Amounts

This section displays amounts for professional loans if the effective date is equal to or greater than April 26, 2026.

Field or Control	Description
Award Year	Displays the award year used in the student's professional loan limits determination.
Dependency	Displays the dependency status used in the student's professional loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in aggregate and consolidated categories.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the aggregate and consolidation categories.

Other

Field or Control	Description
Perkins Principal Balance	Displays Perkins loans outstanding principal balance.
PLUS Outstanding Balance	Displays the aggregate loan outstanding principal balance amount for all PLUS loans where the borrower is the PLUS holder.
Grad PLUS Outstanding Balance	Identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.
Consolidation Outstanding Balance	Displays the outstanding principal balance for all FFELP consolidation loans.
TEACH Loan Principal Balance	Displays the outstanding principal balance for TEACH unsubsidized loan type (D8).
Parent PLUS Total	Amount of Parent PLUS borrowed on behalf of the dependent student.
Perkins Current Year Loan Amount	Displays the total Perkins loan disbursements for the award year (July-June).

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Field or Control	Description
PLUS Total	Displays the aggregate loan total amount for all PLUS loans where the borrower is the PLUS holder.
Grad PLUS Total	Displays the total loan amount of graduate PLUS loans borrowed by the student.
Consolidation Total	Displays the total of all FFELP consolidation loans.
TEACH Loan Total	Displays the total of Aggregate TEACH unsubsidized loan outstanding principal balance.
Lifetime Max Loan Total	Total amount of Title IV loans a student has borrowed.

Viewing NSLDS Overpayment Information

Access the NSLDS Overpayment Information page (click the **Overpayment Information** link on the NSLDS Information page).

The system displays any overpayments for the following:

- Pell Overpy (Pell overpayment)
- Perk Overpy (Perkins overpayment)
- SEOG Ovrpy (SEOG overpayment)
- ACG Ovrpy (ACG overpayment)
- NSG Overpy (NSG overpayment)
- TEACH Overpay (TEACH overpayment)
- IASA Overpay (Iraq/Afghanistan Service Award overpayment)

The values for overpayment are:

- *F:* Fraud designated through an overpayment.
- *Y:* An active overpayment exists.
- *S:* The student has an overpayment, but has made satisfactory arrangements for repayment.
- *N:* Not applicable.
- *D:* Deferred.
- *W:* Waived.

The Pymnt Contct (payment contact) fields refer to the contact agency for the overpayment. The federal ID appears if an overpayment is present.

Viewing Details of NSLDS Aggregate Data

Access the NSLDS Detail page (click the **Detail** link on the NSLDS Information page).

The system displays NSLDS change flags, loan limit flags, MPN flags, and NSLDS Alert file flags:

- The **NSLDS Activity** group box displays data from the ISIR record that indicates if more than three rows exist in NSLDS for the respective area.

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- The **Change Flags** group box indicates changes that have occurred to the respective area on the student's NSLDS record.
- The **Limit Flags** group box indicates the condition of various aggregates.

  Possible values for the loan limits are *E: Met or Exceeded Loan Limit, C: Close to Limit, N: No Problem.*

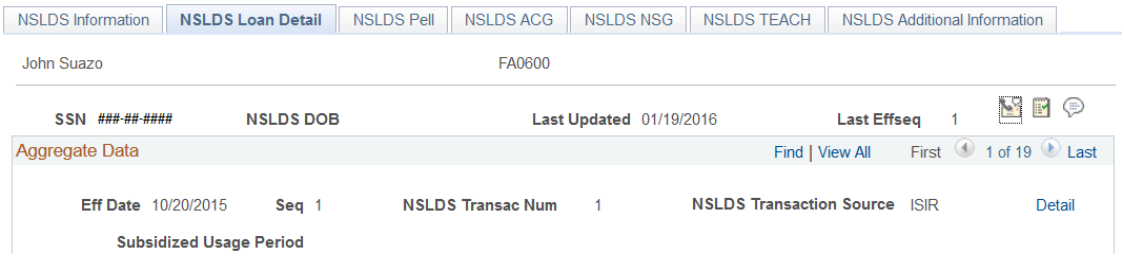
  Possible values for the Pell Limit are *E: Met or Exceeded Limit*, *C: Close to Limit*, *H: High Pell Percent*, *N: No Problem*.

  Possible values for **NSLDS Sub Usage Limit Applies** are *Y* and *N*.
- The **MPN Flags** group box indicates the promissory note status for various Direct Lending loans.
- The **NSLDS Alert File Flags** group box fields indicate when a change has been reported that might affect the student's eligibility. These data elements come from the TSM and ISIR records.

Viewing NSLDS Loan Details

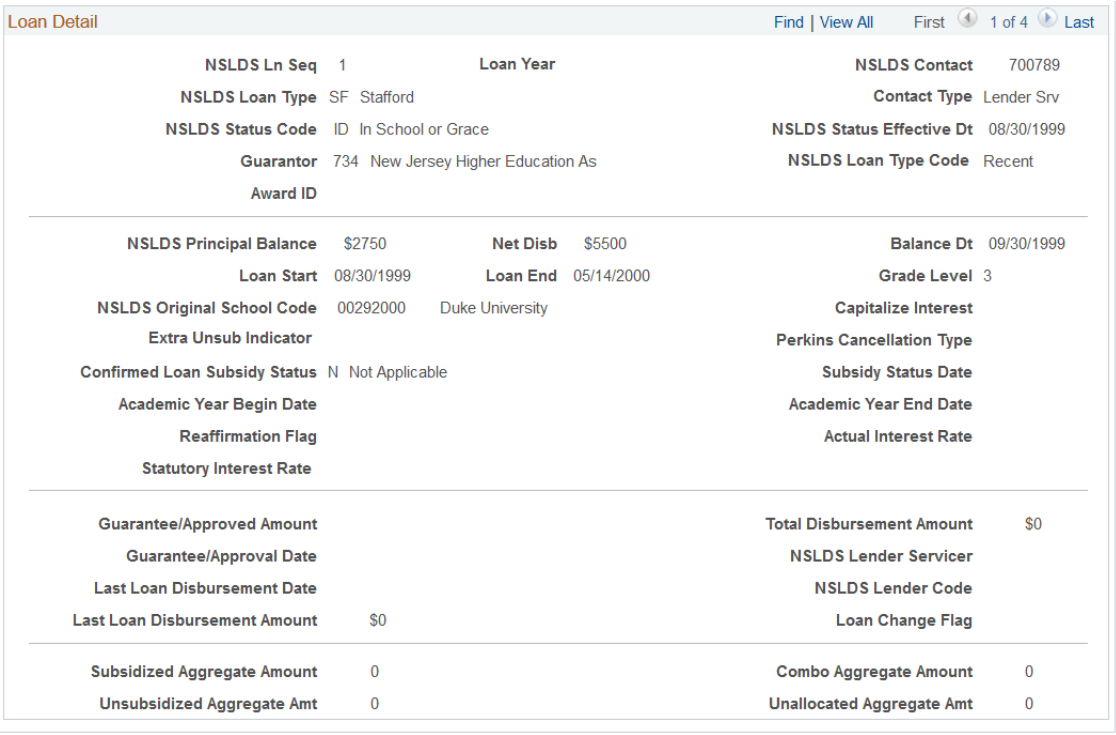
Access the NSLDS Loan Detail page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Loan Detail**).

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



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

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Loan Detail

Find | View All First 1 of 4 Last

NSLDS Ln Seq	1	Loan Year		NSLDS Contact	700789
NSLDS Loan Type	SF Stafford			Contact Type	Lender Srv
NSLDS Status Code	ID In School or Grace			NSLDS Status Effective Dt	08/30/1999
Guarantor	734 New Jersey Higher Education As			NSLDS Loan Type Code	Recent
Award ID					
NSLDS Principal Balance	$2750	Net Disb	$5500	Balance Dt	09/30/1999
Loan Start	08/30/1999	Loan End	05/14/2000	Grade Level	3
NSLDS Original School Code	00292000 Duke University			Capitalize Interest	
Extra Unsub Indicator				Perkins Cancellation Type	
Confirmed Loan Subsidy Status	N Not Applicable			Subsidy Status Date	
Academic Year Begin Date				Academic Year End Date	
Reaffirmation Flag				Actual Interest Rate	
Statutory Interest Rate					
Guarantee/Approved Amount				Total Disbursement Amount	$0
Guarantee/Approval Date				NSLDS Lender Servicer	
Last Loan Disbursement Date				NSLDS Lender Code	
Last Loan Disbursement Amount	$0			Loan Change Flag	
Subsidized Aggregate Amount	0			Combo Aggregate Amount	0
Unsubsidized Aggregate Amt	0			Unallocated Aggregate Amt	0

The system displays the student's name and ID, **SSN, NSLDS DOB, Last Updated, Last Effseq, Eff Date** (effective date), **Seq** (sequence), **NSLDS Txn Nbr** (NSLDS transaction number), , **NSLDS Txn Src** (NSLDS transaction source), and Subsidized Loan Elig Used (Subsidized Loan Eligibility Used) field.

Loan Detail

In the **Loan Detail** group box, the system displays **NSLDS Ln Seq** (NSLDS loan sequence), **Loan Year, NSLDS Contact, NSLDS Type, Contact Type, NSLDS Status, Stat EFFDT** (status effective date), **Guarantor,** and **NSLDS Ln TypCd** (NSLDS loan type code). The system displays **Prin Bal** (principal balance), **Net Disb** (net disbursed), **Balance Dt** (balance date), **Loan Start** and **Loan End, Orig Schl** (original school), and **Grade Level.**

Field or Control	Description
Award ID	Displays the Award ID provided by COD. The Award ID identifies the TEACH loan (D8 Loan Type Code) that was converted from a grant.
Grade Level	Displays NSLDS grade level for the student in this loan year.

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Field or Control	Description
Perkins Cancellation Type	Indicates the cancellation status of the Perkins loan. Values are: *DT:* Defense Teacher *PB:* Perkins Bankruptcy *PD:* Perkins Death *PE:* Perkins Early Intervention *PI:* Perkins Disability *PL:* Perkins Law Enforcement *PM:* Perkins Military Service *PN:* Perkins Nurse/Medical Technician *PS:* Perkins Subject Matter Area *PT:* Perkins Teacher Service *PV:* Perkins Volunteer *N/A:* Not Applicable
Guarantee/Approved Amount	Displays approved amount for the loan.
Guarantee/Approved Date	Displays date of the loan approval.
Subsidized Aggregate Amount	Displays FFELP consolidation loan subsidized aggregate amount, the amount included in the subsidized aggregate calculation. The system populates this value only if the loan type is CL.
Unsubsidized Aggregate Amt (unsubsidized aggregate amount)	Displays FFELP consolidation loan unsubsidized aggregate amount, the amount included in the unsubsidized aggregate calculation. The system populates this value only if the loan type is CL.
Combo Aggregate Amount (combined aggregate amount)	Displays FFELP consolidation loan combined aggregate amount, the amount included in the combined aggregate calculation, which can include HEAL. The system populates this value only if the loan type is CL.
Unallocated Aggregate Amt (unallocated aggregate amount)	Displays FFELP consolidation loan unallocated aggregate amount, the amount that could not be determined to be subsidized, unsubsidized, or Perkins. The system populates this value only if the loan type is CL.
Confirmed Loan Subsidy Status	Displays the current status of a SULA eligible loan's subsidy as reported by the servicer. Valid values are: • *L – Lost Subsidy* • *R – Reinstated Subsidy* • *N – Not applicable for non-D0 loans or no change to subsidy status for D) loans* • *blank*
Subsidy Status Date	Displays the effective date of the Confirmed Loan Subsidy Status.
Academic Year Begin Date and **Academic Year End Date**	Displays the student's academic year begin and end dates for the period covered by the loan. These fields are only updated by imported NSLDS (FAH/TSM) data.

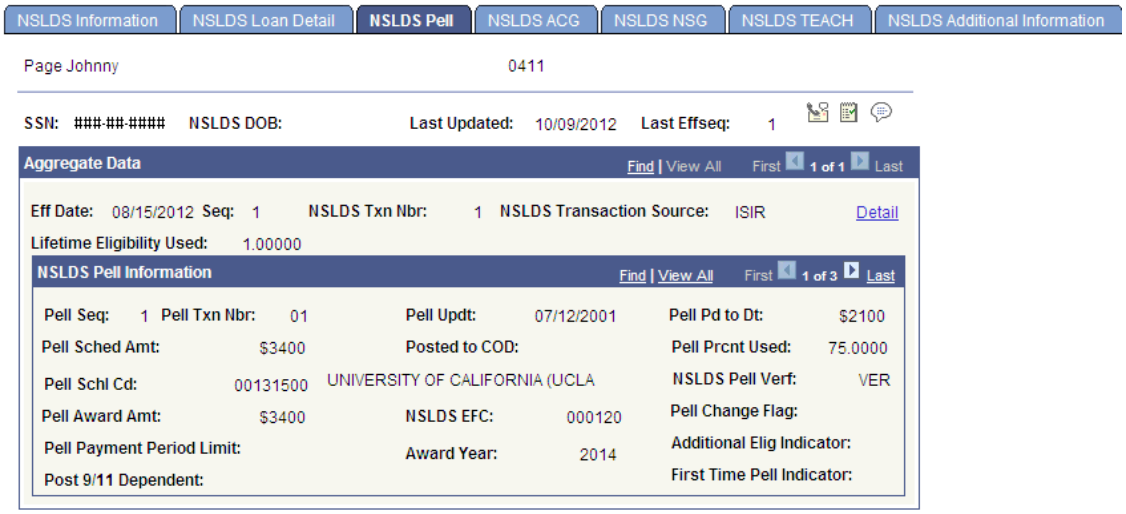
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Field or Control	Description
Reaffirmation Flag	Indicates if the loan has an active reaffirmation.

Viewing NSLDS Pell Information

Access the NSLDS Pell page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Pell**).

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



NSLDS Pell Information

Field or Control	Description
Lifetime Eligibility Used	Displays the **Lifetime Eligibility Used** for federal grant recipients as defined by current regulations. This value is displayed in the 99.99999 format. For example, a value of 01.00000 is 0100.000%. **Note:** The Pell Lifetime Eligibility Used (LEU) field can be populated by the ISIR record or the NSLDS FAH/TSM file.
NSLDS EFC/SAI(NSLDS Pell expected family contribution/student aid index)	Displays the EFC/SAI used when the particular Pell Award was paid.
NSLDS Pell Verf (NSLDS Pell verification)	Displays the Verification status of the EFC/SAI.
Pell Change Flag	Displays *Y* if there has been a change in the student's Pell eligibility.
Pell Payment Period Limit	Displays the payment period limit for Pell grants.
Post 9/11 Dependent	Displays *Y* if the student was a dependent of a post 9/11 deceased veteran.

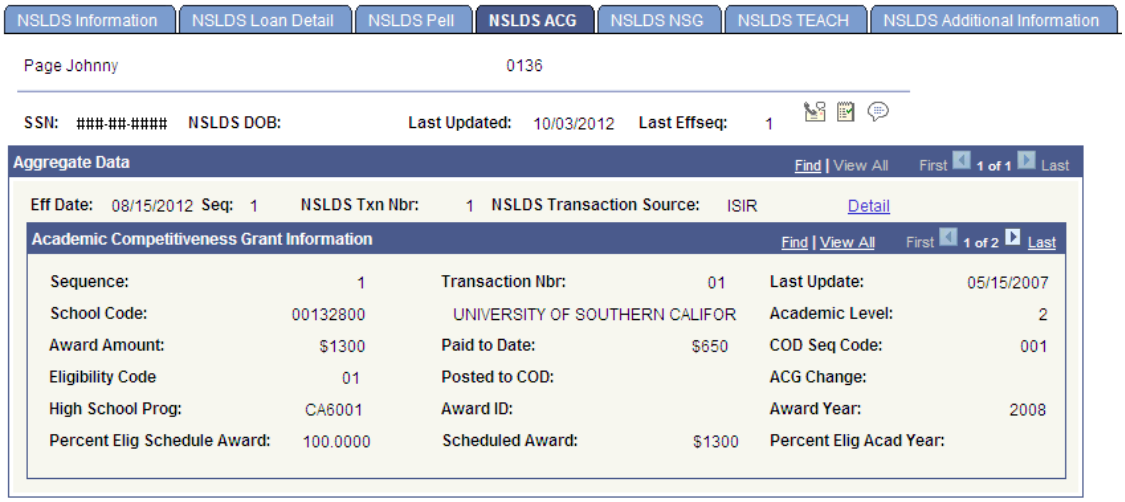
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Field or Control	Description
Additional Elig Indicator (Additional Eligibility Indicator)	Displays *Y* if the student is eligible for two Pell grants in an award year.
First Time Pell Indicator	Displays *Y* if the Pell award is the student's first actual Pell disbursement.
Workforce Program Indicator	Indicates Pell Award is associated with a program approved as Workforce Pell eligible.

Viewing NSLDS ACG Grant Details

Access the NSLDS ACG page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS ACG**)

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



Field or Control	Description
Sequence	Displays the sequential key value assigned by the NSLDS load process.
Transaction Nbr (transaction number)	Displays the transaction number on the SAR or ISIR for the payment accepted by the school.
Last Update	Displays the last reported update to the grant record maintained by NSLDS.
School Code	Displays an 8-digit ED OPE code used to identify the school and branch attended by the student with the grant. The last two digits are 00 if no branch code exists.
Academic Level	Indicates the student's grade level for ACG and SMART grants.
Award Amount	Displays the accepted origination amount.
Paid to Date	Displays the amount of the Federal Grant the school has disbursed to the student.

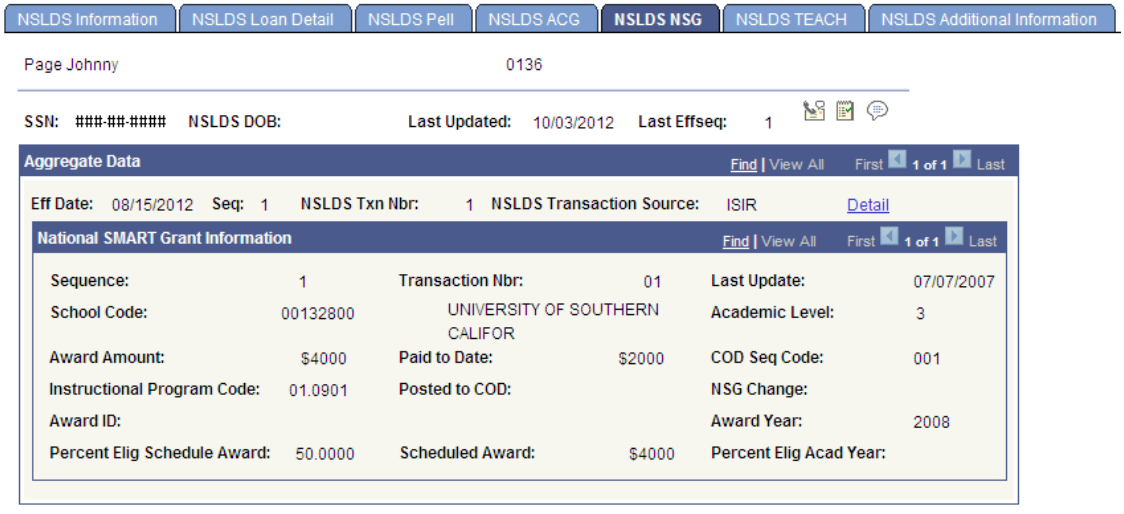
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Field or Control	Description
COD Sequence Code	Displays the identifying sequence number from the Award ID for ACG and SMART grants.
Eligibility Code	Indicates the eligibility payment code for the ACG grant.
Posted to COD	Displays the date that disbursement was posted to the COD system. The format is CCYYMMDD.
ACG Change	Indicates change to this Academic Competitiveness Grant record in the current transaction, either *Y* or *N*.
High School Prog (high school program code)	Indicates the high school program code for the ACG grant.
Award ID	Displays the award ID provided by COD, which consists of: • SSN (9 characters) • Award Type (ACG = A) • Award Year (2 characters) • Pell School ID (6 characters) • Award Sequence Number (3 characters)
Percent Elig School Award (percent eligible school award)	Indicates the **Total Percent Eligibility Used by Academic Year Level** field from the NSLDS batch file layout.

Viewing NSLDS NSG Grant Details

Access the NSLDS NSG page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS NSG**).

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



The fields on the NSLDS NSG page are the same as the fields on the NSLDS ACG page with the following exceptions:

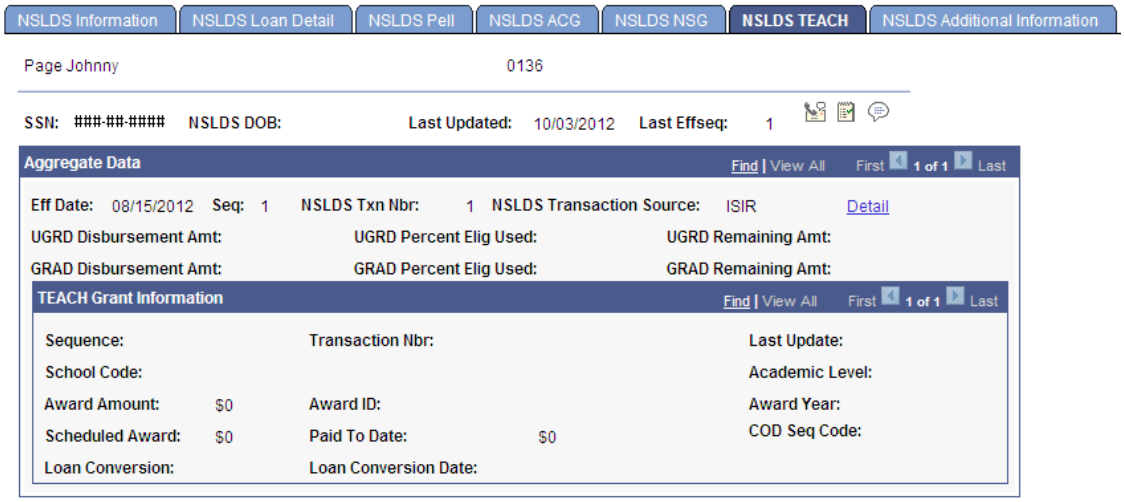
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Field or Control	Description
Instructional Program Code	Indicates a student's major course of study; the CIP-designated (Classification of Instructional Programs designated) code for SMART grants.
NSG Change	Indicates change to this NSG record in the current transaction, either *Y* or *N*.
Award ID	Displays the Award ID provided by COD, which consists of: • SSN (9 characters) • Award Type (NSG = T) • Award Year (2 characters) • Pell School ID (6 characters) • Award Sequence Number (3 characters)
Percent Elig School Award (percent eligible school award)	Indicates the **Total Percent Eligibility Used by Academic Year Level** field from the NSLDS batch file layout.

Viewing NSLDS TEACH Grant Details

Access the NSLDS TEACH page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS TEACH**).

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



Aggregate Data

The fields on the NSLDS TEACH page are the same as the fields on the NSLDS ACG page with the following exceptions:

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Field or Control	Description
UGRD Disbursement Amt (undergraduate disbursement amount)	Displays the Aggregate Undergraduate/Post Baccalaureate TEACH grand disbursed amounts for the undergraduate academic levels.
GRAD Disbursement Amt (graduate disbursement amount)	Displays the Aggregate Undergraduate/Post Baccalaureate TEACH grand disbursed amounts for the graduate academic levels.
UGRD Percent Elig Used (undergraduate percent eligibility used)	Displays the TEACH grant awarded percent used by Undergraduate/Post Baccalaureate Academic Levels.
GRAD Percent Elig Used (graduate percent eligibility used)	Displays the TEACH grant awarded percent used by Graduate Academic Levels.
UGRD Remaining Amt (undergraduate remaining amount)	Displays the remaining eligible amount used by Undergraduate/Post Baccalaureate Academic Levels. Displays N/A if no applicable grant exists.
GRAD Remaining Amt (undergraduate remaining amount)	Displays the remaining eligible amount by Graduate Academic Levels. Displays N/A if no applicable grant exists.

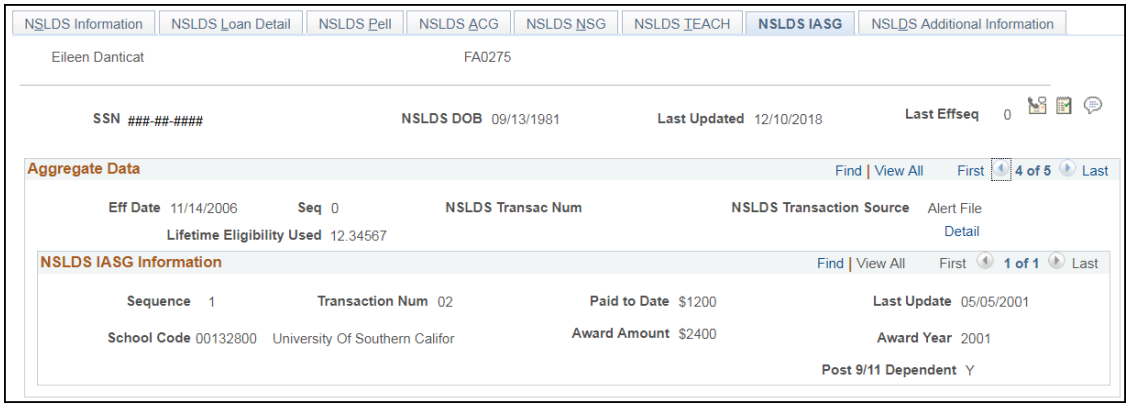
Teach Grant Information

Field or Control	Description
Loan Conversion	Displays *Y* if TEACH Grant was converted to a loan and *N* if it has not been converted.
Loan Conversion Date	Displays the date the TEACH grant was converted to a loan. Displays N/A if grant was not converted.

Viewing NSLDS IASG Grant Details

Access the NSLDS IASG page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS IASG**).

This example illustrates the fields and controls on the NSLDS IASG page.

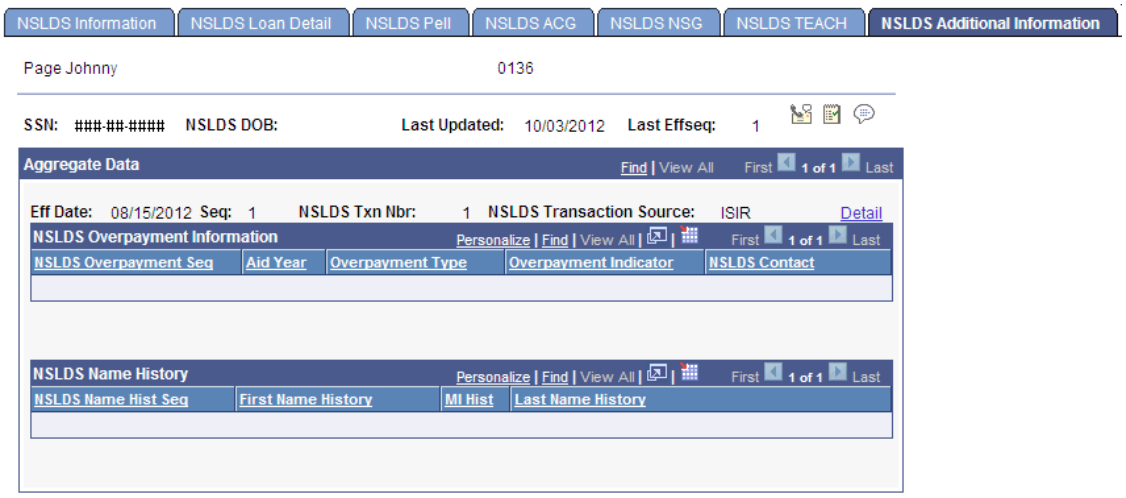


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Viewing NSLDS Additional Information

Access the NSLDS Additional Information page (**Financial Aid**, and then **Awards**, and then **View NSLDS Loan Data**, and then **NSLDS Additional Information**).

This example illustrates the fields and controls on the NSLDS Additional Information page. You can find definitions for the fields and controls later on this page.



The system displays the student's name, **ID, SSN, NSLDS DOB, Last Updated, Eff Date** (effective date), **Last Effseq,** (last effective sequence), **Seq,** (sequence), **NSLDS Txn Nbr,** (NSLDS transaction number), and **NSLDS Txn Src** (NSLDS transaction source).

NSLDS Overpayment Information

Field or Control	Description
NSLDS Overpayment Seq (NSLDS overpayment sequence)	Displays the sequential order (1, 2, 3) in which the ISIR loads.
Overpayment Type	Displays the type of aid, such as Pell, Perkins, or SEOG, that was overpaid.
Overpayment Indicator	Overpayment indicator refers to the overpayment. Values are: *N:* No *Y:* Yes *S:* Satisfactory Arrangement.
NSLDS Contact	Displays the agency school, servicer, or lender to contact for this loan.

NSLDS Name History

The system displays **Nm Hist Seq** (name history sequence), **F Name Hist** (first name history), **MI Hist** (middle initial history), and **L Name Hist** (last name history).

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Understanding the NSLDS Data Push Process

To use NSLDS data in the Awarding and Packaging processes, you must ensure that the Packaging Processes are setup to use NSLDS as an aggregate source, load NSLDS Data via ISIR Load, FAH request, or TSM request, and push NSLDS data into aggregate aid tables used by the Packaging processes.

The process evaluates NSLDS aggregate records and populates Campus Solutions aggregation fields based on:

- NSLDS transaction process date
- legacy migration indicator
- graduate and professional student indicators
- aggregate area reported in the NSLDS record

Processing rules for loan aggregate areas subject to OB3 updates

For Direct Loan aggregate areas that are affected by the One Big Beautiful Bill (OB3) changes, the process uses Transaction Process Date from the NSLDS file loaded to determine which NSLDS file layout applies. Transactions processed before April 26, 2026 use the prior NSLDS aggregate layout, while those processed on or after April 26, 2026 use the new NSLDS aggregate layout.

Transactions processed before April 26, 2026

The push process uses the prior NSLDS aggregate layout.

- Subsidized Aggregate Area: The NSLDS Aggregate Subsidized Outstanding Principal Balance populates the **NSLDS Total** field.
- Unsubsidized Aggregate Area: The NSLDS Aggregate Unsubsidized Outstanding Principal Balance populates the **NSLDS Total** field.
- Perkins Aggregate Area: The NSLDS Perkins Total Outstanding Principal Balance populates the **NSLDS Total** field.
- Graduate PLUS Aggregate Area: The NSLDS Aggregate PLUS Graduate/Professional Loans Outstanding Principal Balance populates the NSLDS Total field. Note, that balance is only provide with the TSM/FAH file layouts.
- TEACH Aggregate Areas: Distinct calculated TEACH undergraduate and graduate totals, depending upon grade level, aid year and school code, populate the respective Undergraduate and Graduate NSLDS Total fields.
- Pell Aggregate Area: NSLDS Total and Percent Scheduled Used based on current aid year Pell Disbursed Amounts are updated. Beginning with Aid Year 2013 an additional Lifetime Eligibility Used percentage field will also be updated. See Awarding Pell Grants for more information.
- Areas Subject to Overpayment: When the NSLDS Data Push process encounters an overpayment indicator for the Pell, SEOG, Perkins, and TEACH programs of either *Y* or *F,* it posts a value of 999,999,999.00 as the NSLDS Total for the corresponding aggregate area.
- Excluded NSLDS Transactions: For the Pell and TEACH grant programs, transactions that match like award types that have already been internally packaged in the system are not included when determining which NSLDS transactions to sum and post to the NSLDS Total

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for a given aid year. Beginning with Aid Year 2013, the Pell Lifetime Eligibility Used percentage field also excludes NSLDS transactions from the Lifetime percentage value.

> **Note**
>
> Because the NSLDS Data Push process evaluates the most recent NSLDS data regardless of source (ISIR, FAH, or TSM), the NSLDS data that is pushed may not include the complete lifetime amounts used. For example, if the most recent NSLDS data is from an ISIR, the ISIR only includes up to three transaction sequences of data for each grant and loan type. The ISIR record does provide flags and indicators if there are more than 3 transactions. Check the NSLDS Financial Aid Professionals web site for additional information.

For the 2013 Aid Year, the Pell Lifetime Eligibility Used value is pushed from the most current NSLDS data; sourced from either FAH or TSM. Oracle recommends that if you plan to push aggregates for the 2013 Aid Year, you should ensure a recent FAH or TSM has been requested and loaded into the NSLDS tables.

Beginning with the 2014 Aid Year, the Pell Lifetime Eligibility Used value will be pushed from the most current NSLDS data, regardless of source.

Transactions processed on or after April 26, 2026

The push process uses the new NSLDS aggregate layout and evaluates the aggregate area and student type to determine the correct Campus Solutions target field.

The logic for population of the following areas is unchanged.

- Graduate PLUS Aggregate Area
- TEACH Aggregate Area
- Pell Aggregate Area
- Perkins Aggregate Area

Keep these processing rules in mind:

- The NSLDS transaction process date determines whether the prior or new NSLDS layout is used.
- Packaging does not evaluate NSLDS Graduate Aggregate Total and NSLDS Professional Aggregate Total until Aid Year 2027.

For Undergraduate students:

- Subsidized Aggregate Area: The NSLDS Undergraduate Aggregate Subsidized Outstanding Principal Balance populates the NSLDS Total field.
- Unsubsidized Aggregate Area: The NSLDS Undergraduate Aggregate Unsubsidized Outstanding Principal Balance populates the NSLDS Total field.
- Parent PLUS Aggregate Area: The NSLDS Aggregate Student Recipient Parent PLUS Total populates the OB3 Parent PLUS Total.

For Graduate students:

Unsubsidized Aggregate Area: The NSLDS Graduate Aggregate Outstanding Principal Balance populates the NSLDS Graduate Aggregate Total field.

For Professional students:

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Unsubsidized Aggregate Area: The NSLDS Professional Aggregate Outstanding Principal Balance populates the NSLDS Graduate Aggregate Total field.

Related Topics

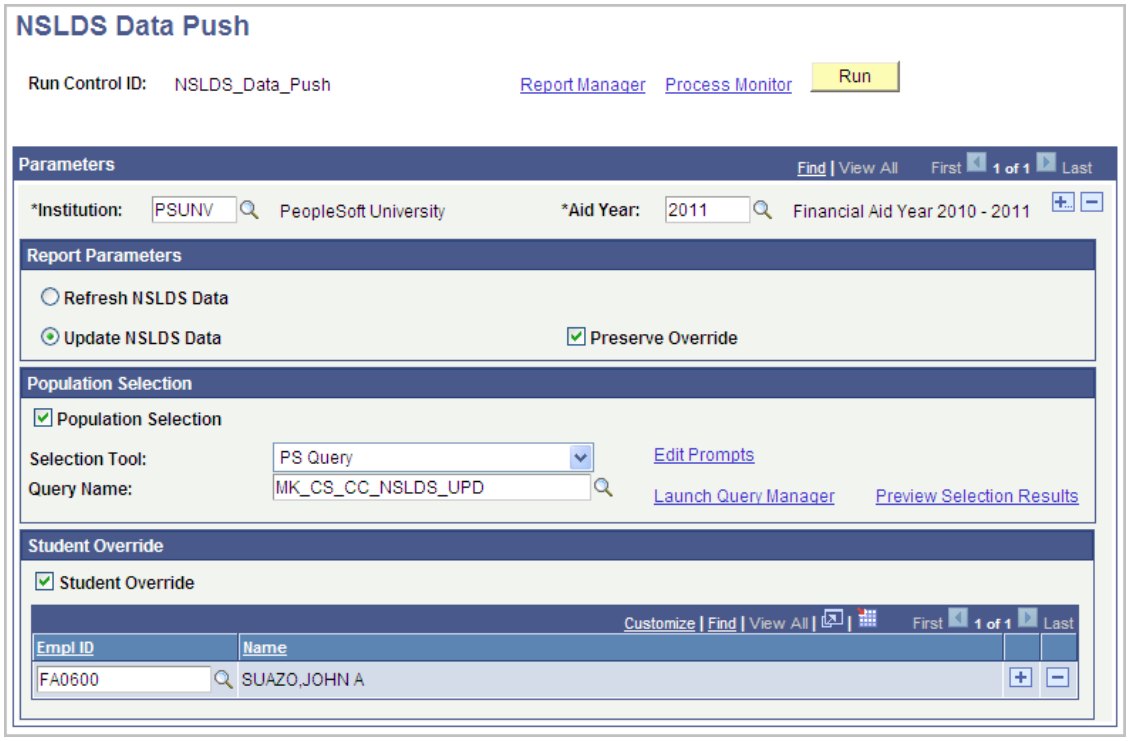
- Understanding Aggregate Aid
  To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete aid history when determining aid eligibility.

Pushing NSLDS Data

Use the NSLDS (National Student Loan Data System) Data Push page to push NSLDS totals into the Packaging aggregate aid tables.

Access the NSLDS Data Push page (**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **Update Aggregates with NSLDS**, and then **NSLDS Data Push**).

This example illustrates the fields and controls on the NSLDS Data Push page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Institution	Enter the Institution Code for the institution for which you want NSLDS data pushed. **Note:** You can identify multiple institutions in this run control.

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Field or Control	Description
Report Parameters	*Refresh NSLDS Data:* Always overwrites the existing NSLDS Total present for the Aid Year defined above. *Update NSLDS Data:* Updates NSLDS Total only if NSLDS data is more current than present data for the aid year defined above. *Preserve Override:* Update does not take place if the **NSLDS Total** amount has been overridden at the student level.
Population Selection	Select this check box to access population selection options. If not selected, the process attempts to process Student Overrides. See Campus Community Fundamentals: Using the Population Selection Process.

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Field or Control	Description
Query Name	Select a PS Query that uses the *SFA_NSLDS_BND* bind record. System Provided Queries: • QA_CS_CC_NSLDS_UPD1: Query based on NSLDS_GEN (NSLDS General Info record). Embedded field prompts on LAST_UPDATED – Last Updated From Date/LAST_UPDATED – Last Updated To Date. • QA_CS_CC_NSLDS_UPD2: Query based on NSLDS_GEN (NSLDS General Info record). Embedded field prompts on LAST_UPDATED – Last Updated From Date/LAST_UPDATED – Last Updated To Date and NSLDS_UPDT_SOURCE-NSLDS Transaction Source. • QA_CS_CC_NSLDS_UPD_DAY_BEFORE: Query based on NSLDS_GEN (NSLDS General Info record). Use this SQL to schedule the independent NSLDS Aggregate Push on a daily basis. This query identifies students whose Last Updated NSLDS record has changed since one day ago. SELECT DISTINCT B.EMPLID, B.NAME FROM PS_SFA_NSLDS_BND B, PS_NSLDS_GEN A WHERE (B.EMPLID = A.EMPLID AND A.LAST_UPDATED >= ((TO_DATE(TO_CHAR(SYSDATE,'YYYY-MM-DD'),'YYYY-MM-DD')) + (-1))) ORDER BY 1 Example: If the system date = 20111129, then query selects EMPLIDs whose NSLDS_GEN.LAST_UPDATED value is either 20111128 or 20111129. • QA_CS_CC_NSLDS_UPD_WEEK_BEFORE: Query based on NSLDS_GEN (NSLDS General Info record). Use this SQL schedule the independent NSLDS Aggregate Push on a weekly basis. This query is used to identify students whose Last Updated NSLDS record has changed within the last 7 calendar days. SELECT DISTINCT B.EMPLID, B.NAME FROM PS_SFA_NSLDS_BND B, PS_NSLDS_GEN A WHERE (B.EMPLID = A.EMPLID AND A.LAST_UPDATED >= ((TO_DATE(TO_CHAR(SYSDATE,'YYYY-MM-DD'),'YYYY-MM-DD')) + (-7))) ORDER BY 1 Example: If the system date = 20111129, then query selects EMPLIDs whose NSLDS_GEN.LAST_UPDATED value is 20111122, 20111123, 20111124, 20111125, 20111126, 20111127, 20111128, or 20111129.

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Field or Control	Description
Student Override	Select this check box and populate the accompanying group box with student ID's to be evaluated. IDs can be combined with IDs identified with Population Selection.

Viewing Application History

The oldest aid-year-specific pages are removed from the various menus and stored in the Financial Aid History menu. You can access pages and components for three years of processing.

This section discusses how to review application history.

Pages Used to View Application History

Page Name	Definition Name	Navigation	Usage
Historical Application Information	FA_APP_HIST_TRNSFR	**Financial Aid**, and then **Financial Aid History**, and then **View Archived Application Data**, and then **Historical Application Information**	Access Federal EFC Summary, Institutional Application, Application Data Verification, Institutional EFC Summary, and ISIR History components and pages.
Federal EFC Summary	ISIR_FM_SUMRY	Click the **Federal EFC Summary** link on the Historical Application Information page.	View archived EFC summary data.
Institutional Application	INST_STUDENT_A, INST_STUDENT_01, INST_STUDENT_02, INST_STUDENT_03	Click the **Institutional Application** link on the Historical Application Information page.	View data on the following pages in the Maintain Institutional Application component: Student Data, Parent Data, Miscellaneous Data, and Computation Data.
ISIR Inbound Load Summary	ISIR _nn_IN_SRCH	Click the **ISIR Inbound** link on the Historical Application Information page.	View ISIR Inbound Data history beginning with the 2014–2015 Aid Year.
RTIV Worksheet	STDNT_RTRN_TIV_WK1	Click the **View RTIV Worksheet** link on the Historical Application Information page. Then select the **Return of Funds Worksheet** page.	View the RTIV worksheet for the selected student and aid year.

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Page Name	Definition Name	Navigation	Usage
Post Withdrawal Disb Tracking	TIV_PWD_TRACKING	Click the **View RTIV PW Disbursement** link on the Historical Application Information page.	View RTIV Post Withdrawal Disbursement information such as status (pending or complete) and disbursement dates.
Return of TIV Summary	RTRN_TIV_STU_TRACK	Click the **View RTIV Return Summary** link on the Historical Application Information page.	View RTIV summary information for students who have *Complete* or *Pending* status. The calculation period, amount due from school, and amount due from student is shown.
Institutional EFC Summary	INST_INAS_SMRY_06	Click the **Institutional EFC Summary** link on the Historical Application Information page.	View data for aid year.
ISIR Corrections NN/NN	ISIR_PIA_CS1_nn	Click the **ISIR Corrections** link on the Historical Application Information page.	View ISIR Correction history. Formerly labeled “ISIR History”.
ISIR Suspense Management NN/NN	ISIR_SUSP_CNTRPIAnn	Click the **ISIR Suspense** link on the Historical Application Information page.	View ISIR Suspense history beginning with the 2014–2015 Aid Year.
Application Data Verification	VERIFICATION_INC	Click the **Application Verification** link on the Historical Application Information page.	View data on the following pages in the Application Data Verification History component: Income Verification, Household Information, Worksheet A, Worksheet B, and Consolidated Tax Forms.
View RTIV Fund Return	TIV_RTRN_TRACKING	Click the **View RTIV Fund Return** link on the Historical Application Information page.	View student return of Title IV funds. View the status of funds for all students where a calculation exists.

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Reviewing Application History

Access the Historical Application Information page (**Financial Aid**, and then **Financial Aid History**, and then **View Archived Application Data**, and then **Historical Application Information**).

Click any link to view the detailed information for the selected student and aid year.

Field or Control	Description
Source	*FT CSL:* full-time Canada student loan *Inst App:* institutional application *PT CSL:* part-time Canada student loan *Profile*

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26

Satisfactory Academic Progress

Understanding SAP

This section includes an overview of SAP calculations and discusses:

- Eight tests for SAP.
- Student selection criteria for SAP evaluation.
- Batch, online, and simulation processes.
- Pass 1 and Pass 2 evaluations.

Overview of SAP Calculations

The SAP online or batch process determines a student's SAP status by comparing calculated values with established setup or student-specific rules. The process calculates up to eight separate tests. The institution chooses whether or not to use each of the following tests and sets the rules for each:

- Academic Standing
- Maximum Attempted Units
- Maximum Attempted Terms
- Minimum Current GPA
- Minimum Cumulative GPA
- Current Earned Units
- Cumulative Earned Units
- Two Year GPA

The process uses the user-defined rules to calculate a status code for each individual test and then calculates an overall status code. The overall status code is determined by the highest severity code for each test used. All calculated statistics and status codes are populated on the Student SAP page, which has a **Packaging Status Summary** link to the updated **Satisfactory Academic Progress** field on the Packaging Status Summary page.

The calculated code or override status code determines the **Satisfactory Academic Progress** value on the Packaging Status Summary page. This value is used for other Financial Aid processes and is only updated when the SAP process is run. Further change to the SAP status value can be made only on the Student SAP page, which automatically updates the Satisfactory Academic Progress field on other pages.

SAP calculation can be performed two ways:

- Term processing, which is based on a single term.
- Aid Year processing, which is based on multiple terms within an aid year.

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When updating the Satisfactory Academic Progress field on the Packaging Status Summary page:

- Term processing looks up the term being processed on FA Term and uses that FA Term aid year to update the Packaging Status Summary page.
- Aid Year processing uses the aid year being processed to update the Packaging Status Summary page.

The calculation and evaluation of the rules of the eight tests uses a student's data from Student Career Term and Student Enrollment, which are both term-based tables. Consequently, you must define which terms are evaluated for the calculation based on each of the two processing types (term and aid year). Here is how the two process types differ:

- For term processing, you define a specific term in which to determine SAP eligibility. This setup step associates all the terms to be used for evaluating the eight tests when calculating for this specific term. For example, SAP eligibility for spring 2008 term is based on data from the fall 2007 and summer 2007 terms.
- For aid year processing, you define a specific aid year in which to determine SAP eligibility. This setup step associates all the terms to be used for evaluating the eight tests when calculating for this specific aid year. For example, SAP eligibility for Aid Year 2008 is based on data from the fall 2006, spring 2007, and summer 2007 terms.

The SAP process selects the group of students to be updated based on selection entered on the run control page or established criteria for a single student when running online. The following table lists the hierarchy used by the process to determine which exception rule or setup rule to apply for each of the eight tests.

Rule	Consequence
Aid Year or Term Exceptions	If an override exists on the Aid Year Exceptions page or Term Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data), the student-specific aid year or term exception rule is evaluated. If the student fails, the exception failure default is assigned and the exception and fail flags are set to Yes. If the student does not fail, then the next type of rule in this hierarchy is reviewed.
Career Exceptions	If an override exists on the Career Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Career Exceptions), the student-specific career exception rule is evaluated. If the student fails, the exception failure default is assigned and the exception and fail flags for that test are set to Yes. If the student does not fail, then the next type of rule in this hierarchy is reviewed.
Academic Plan, Academic Program, Academic Career	The academic plan, academic program, and academic career rule **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria)** is applied if the student is active in a matching academic plan, academic program, and academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.

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Rule	Consequence
Academic Program, Academic Career	The academic program and academic career rule **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria)** is applied if the student is active in a matching academic program and academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.
Academic Career	The academic career rule **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria)** is applied if the student is active in a matching academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.

Eight Tests for SAP

The Satisfactory Academic Progress feature uses eight specific tests to measure whether a student is making progress. Three tests (Academic Standing, Maximum Attempted Units, and Maximum Attempted Terms) are quantitative evaluations and five tests (Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA) are qualitative evaluations. You set up rules for each test on the Criteria1 (quantitative) and Criteria2 (qualitative) pages.

During the test evaluation, each student's actual value for the test is calculated. Then the process searches through setup rules for a match to that value:

- If no rule matches are found, the student is considered to have passed the test and the Career Pass Default Status code is assigned as the SAP status for that test.
- If a rule match is found, the student is considered to have failed the test and the corresponding SAP status for that rule is assigned as the status and the fail flag is set to Yes.

  The student should then be warned or disqualified. Therefore, it is strongly recommended that you set up the rules to cover the full range of fail requirements with no overlaps.
- An additional quantitative setup, Statuses and Actions rules, is used to compare a student's newly determined SAP status with a previous status and then assign a different status. Statuses and Actions rules can only be applied to Pass 1 eligible records.

  This can be used for multilevel probation statuses.

The SAP Status field in each of the test rule setup grids indicates which SAP Status code to use if a student meets the rules of the test. Ranges and statuses are set up to find students who are not making progress. The rules that you set up should cover the entire range by career, by career and program, or by career, program, and plan. If you set up a rule with program and plan blank, but ranges populated, the process evaluates all students based on the career defined on the Setup page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Setup).** It is important that the rules do not overlap each other as this can cause

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runtime errors. You can set up these failing tests for any academic program and academic plan combination.

Academic Standing Test

Student Records calculates the academic standing value each term. The Academic Standing test determines the SAP status code based on the **Academic Standing** value for either the evaluation term or for the maximum term the student was enrolled within the aid year as defined in the Define Evaluation Aid Year page. The SAP status is determined as follows:

- If the **Academic Standing** field is blank or an academic standing action row does not exist for the maximum term, the Undetermined Default Status code is used.
- If no student-specific exception exists for this criteria and the student is set to the Career Pass Default Status code, Student Records must enter an academic standing value for the student, which can then be calculated normally.
- For students affected by an aid year exception or a term exception, the SAP status is set to Exception Fail Default Status.
- If no override exists for academic standing, the process searches for a match by career, program, or plan and the associated SAP status is used if a match is found.

  When no rule match exists, the Career Pass Default Status code is used.

Maximum Attempted Units Test

This test first counts the units attempted at the institution and does not include any transfer units. The total units attempted at the institution are summed from student enrollment, counting units that are within and prior to the term or aid year being processed. The process uses either the units-taken value or, if that value is zero, the Financial Aid progress units to gather this sum of units attempted at the institution.

The student must be enrolled in the maximum term past the fully graded date. Audited units are not counted. Second, the transfer units are added to that sum from Student Career Term based on the transfer unit options selected on the setup. If no transfer unit options are selected, then the Maximum Attempted Units test only includes units attempted at the institution.

Additionally, if course exclusions are set up and the student is enrolled in any of the defined courses, then those units are subtracted from the attempted unit calculation.

You can select any or none of the following options for including transferred units in attempted units:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

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You can use the following Course Exclusion options to subtract Remedial and/or English as a Second Language (ESL) courses from attempted units:

- Subtract all remedial course units set up in Course Exclusions that the student is enrolled in unless the value of the total remedial units that the student is enrolled in exceeds the value in the Max Remedial Units to Exclude field. For example, if the student is enrolled in 8 remedial units, and the Max Remedial Units to Exclude value is 3, the SAP process count 5 of the 8 remedial units in the attempted unit calculation.
- Subtract all ESL course units set up in Course Exclusions that the student is enrolled in unless the value of the total ESL units that the student is enrolled in exceeds the value in the Max ESL Units to Exclude field.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Maximum Attempted Terms Test

The Maximum Attempted Terms test is based on the number of attempted terms by academic career, as indicated by student enrollment. A term is counted if units are taken, enrollment status is *enrolled,*and at least one course in that term is not audited. A term is not counted if the student either completely drops or audits all courses in that term.

If a student has a career-specific exception, that is evaluated first. The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Minimum Current GPA Test

The Minimum Current GPA test tests whether a student's current GPA falls within a certain range in relation to a range of cumulative earned units. In an example test rule, a student who has between 31 and 60 cumulative earned units and current GPA between 0.00 and 2.99 is assigned a disqualified status.

This test evaluates both the student's current GPA and cumulative earned units. The cumulative earned unit value used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead, the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

The Minimum Current GPA test has two options, an average GPA or a special GPA.

Special GPA is calculated as follows:

- If a student has an aid-year or term-specific exception, that is evaluated first.
- If the **Special GPA** field is populated in the setup, the process compares that student's individual Special GPA Type value to the setup rules.
- If the **Special GPA** field is populated in the setup, and the **Student Special GPA Type** is blank or does not exist for the student, the Undetermined Default Status code is used.
- If the **Special GPA** field is not populated, an average GPA is calculated for this test and is compared to the setup rules.

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This average is calculated by summing the total GPA for all terms for the student within the aid year and then dividing by the number of valid terms from the student career term data.

The current GPA is determined through evaluations:

- For Pass 1, the sum of all of GPAs of the fully graded terms associated with the Aid Year or Term being evaluated divided by the number of the fully graded terms associated with the Aid Year or Term being evaluated. For example, if you are evaluating eligibility for the fall 2006 term and the associated terms are fall 2005 (GPA = 2.50), spring 2006 (GPA = 3.00), and summer 2006 (GPA = 3.50), then the current GPA to be used in the test would be (2.50 + 3.00 + 3.50) divided by 3 equaling 3.00.
- For Pass 2, the current GPA of the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. For example, if you are evaluating eligibility for the fall 2006 term and the associated terms are fall 2005, spring 2006, and summer 2006, and no term data exists for the student, but the student does have spring 2005 term data, then the GPA for spring 2005 is used in the evaluation. Pass 2 does not look at the fully graded date.

The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Minimum Cumulative GPA Test

The Minimum Cumulative GPA test examines whether a student's cumulative GPA falls within a certain range in relation to a range of cumulative earned units. In an example test, a student who has between 31 and 60 cumulative earned units and a cumulative GPA between 0.00 and 2.00 would fail.

The Minimum Cumulative GPA test has two options, the Total Overall GPA and the Special GPA.

- If a student has an aid year- or term-specific exception, that is evaluated first.
- If a student has a career-specific exception, that is evaluated second.
- If the **Use Special GPA Code** field is populated in the setup, the student's Special GPA is used, if the student has a matching Special GPA Type defined.
- If the Special GPA field is not populated in the setup, the cumulative GPA value from the student career term record is used.

  This is the total overall GPA including transfer units from student career term.
- If the Special GPA field is populated in the setup and the Student Special GPA field is blank or does not exist for a student, the Undetermined Default Status code is used.

The Cumulative GPA is determined through evaluations:

- For Pass 1, the cumulative GPA as of the most recent fully graded term associated with the Aid Year or Term being evaluated.
- For Pass 2, the cumulative GPA of the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. Pass 2 does not look at the fully graded date.

This test evaluates both the student's cumulative GPA and cumulative earned units. The cumulative earned unit value used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

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The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Current Earned Units Test

The Current Earned Units test compares the student's attempted units and earned units and assigns an SAP status code. You choose to measure by percentage (percentage of completed units for the current term or aid year) or number of units (number of units to be completed for the current term, by term or aid year).

For example, a student whose attempted units for the current term were between 9 and 12 and earned units were between 0 and 6 might fail.

Unit values are calculated as follows:

- Attempted units are calculated from institutional units only.

  Units are summed from student enrollment from the aid year or term being evaluated. To gather the sum of units attempted at the institution, the process uses the units taken value or if that value is zero, the Financial Aid progress units. The student must be enrolled in the maximum term past the fully graded date. Audited units do not count. Grade Exclusions are not factored into the Attempted Units portion of this test. No transfer units are included.

- Earned units are calculated in one of two ways:

  If grade exclusions are not enabled, units are calculated as the sum of the values from the total passed with GPA and the total passed without GPA on the student career term table. Transfer units are included in the values being summed.

  If grade exclusions are enabled, as with attempted units, the units are derived from student enrollment, but with transfer units included. Then courses that are on the grade exclusions setup are subtracted from the total.

With the attempted units and earned units determined for the aid year or term, the calculated SAP status code is determined in one of two ways:

- Use Percentage

  The student-specific percentage is compared to the calculated percentage (earned/attempted). If the calculated percentage falls within the percentage range and attempted units fall within the attempted units range, the student receives the status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

- Use Completed Units

  The student-specific number is compared to the calculated number (earned/attempted). If the calculated earned units fall within the earned units range and attempted units fall within the attempted units range, the student receives the status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Cumulative Earned Units Test

The Cumulative Earned Units test compares the student's cumulative attempted units and earned units and assigns an SAP status code. For example, a student whose cumulative attempted units were between 45 and 60 and cumulative earned units were between 0 and 30 would meet the rule.

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Attempted units are institutional units summed from student enrollment and include units from all terms within and prior to the aid year or term being evaluated. The process uses either the units-taken value or, if that value is zero, the Financial Aid progress units to gather this sum of units attempted at the institution. Audited units are not counted. Grade Exclusions are not included in attempted units. You then have the option to include different types of transfer units in addition to the institutional attempted units. Transfer Options include:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

Earned units are calculated in one of two ways:

- If grade exclusions are not enabled, first institutional units are taken from the cumulative earned unit value from student career term table for the term or highest term for the aid year being evaluated. Then transfer units are included based on the transfer unit options selected.
- If grade exclusions are enabled, units are summed from student enrollment similar to the base cumulative attempted units. Then courses that the student is enrolled in that are on the grade exclusions setup are subtracted from this total. Transfer units are included based on the transfer unit options selected.

You can use the following options for transfer units to be then included in the cumulative earned units calculation:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

With attempted units and earned units calculated, the calculated SAP status code is determined in one of two ways:

- **Use Percentage**

  The student career-specific percentage is compared to the calculated percentage (earned/attempted). If the calculated percentage is equal to or greater than the student career

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specific rule, the student receives the Career Pass Default Status code. If the student has zero completed units, the Zero Earned Default Status is used. If the calculated percentage is less than the student career-specific rule, the student receives the SAP status code associated with that rule.

- **Use Completed Units**

  The student career-specific number is compared to the calculated number (earned/attempted). If the calculated earned number is equal to or greater than the student specific rule, the student receives the Career Pass Default Status code. If the student has zero completed units, the Zero Earned Default Status is used. If the calculated earned number is less than the student career-specific rule, the student receives the SAP status associated with that rule.

Ensure that the setup covers the entire range of units and percentages or numbers by career, by career and program, or by career, program, and plan. If a rule match is not found, the student receives the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Two Year GPA Test

The Two Year GPA test reviews students who, at the end of their second year, are maintaining at least a C grade point average, that is, a 2.0 or above grade average. This test checks whether a student's current GPA falls within a certain range in relation to a range of attempted terms. In an example test rule, a student who has attempted between 3 and 4 terms and whose current GPA is between 0.00 and 1.99 is assigned a nonpassing status.

Attempted terms are counted by academic career from student enrollment. A term is counted if units are taken, enrollment status is *enrolled,* and at least one course in that term is not audited. A term is not counted if the student either completely drops or audits all courses in that term.

Two options for deriving the cumulative GPA value are the Total Overall GPA and the Special GPA:

- If the Special GPA field is populated in the setup, the Special GPA type is used, which is the cumulative GPA earned at this institution.
- If the Special GPA field is not populated in the setup, the cumulative GPA value from the student career term record is used. This is the Total Overall GPA including transfer units from student career term.
- If the Special GPA field is populated in the setup and the Student Special GPA field is blank or does not exist for a student, the Undetermined Default Status code is used.

The Cumulative GPA is determined through evaluations:

- For Pass 1, the cumulative GPA is as of the most recent fully graded term associated with the Aid Year or Term being evaluated.
- For Pass 2, the cumulative GPA is from the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. Pass 2 does not look at the fully graded date.

In the setup, you must define the number of terms that equals two years of study at your institution. You can set up rules for any combination of terms and GPA by career, by career and program, or by career, program, and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

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Student Selection Criteria for SAP Evaluation

Student selection criteria are the same for online, batch, or simulation processing. If the student has an active FA term for the aid year (aid year processing) or term (term processing) and the career used for the SAP evaluation is not excluded by award type or career, the student is considered eligible for SAP evaluation, and the process attempts to create an SAP calculation or simulation.

Award Exclusions

For Award Exclusions, the system excludes if either the financial aid item type matches or the item type falls within the range defined by the Item Type From and Item Type To values on the Exclusions page.

You can list awards that are excluded from SAP evaluation:

- A student who has only the item types listed in the award exclusions setup is not selected for an SAP evaluation.
- A student who has both excluded item types and nonexcluded item types is selected for an SAP evaluation.
- If exclusions are set up with a financial aid type, but without values in the **Item Type To** and **Item Type From** fields, students who have awards only of that financial aid type are not selected for an SAP evaluation.

> **Note**
>
> Award Exclusions are the only exclusions that affect whether or not a student is selected for an SAP Evaluation. Course and Grade exclusions affect the results of specific tests. Course Exclusions affect the results of the Maximum Attempted Units test. Grade Exclusions affect the Current Earned Units test and the Cumulative Earned Units test.

Standard SAP Selection, Student Override, and Population Selection

Use the one of three options to select IDs for SAP evaluation, Standard SAP Selection, Student Override, or Population Selection.

- If you use the Standard SAP Selection, all IDs for the associated career defined in the run control with the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page are selected for an SAP evaluation. If you use the Student Override options or Population Selection option, the selection is limited to a subset of IDs.
- If you use the Student Override option, only the IDs entered in the override section of the run control page are reviewed to determine whether they have the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page.
- If you use the Population Selection option, only the IDs provided by the Population Selection feature's input Selection Tool are reviewed to determine whether they have the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page.
- If you use either the Student Override or Population Selection option:

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- If an ID meets the SAP Evaluation criteria, the process attempts to calculate an SAP Status for that ID.
- If an ID does not meet the SAP Evaluation criteria, no SAP action is taken for that ID.

See Campus Community Fundamentals: Using the Population Selection Process.

Batch, Online, and Simulation Processes

The online and simulation SAP processes always run with the following options enabled:

- Use Pass 2 data.
- Run if a previous status for the same term/aid year exists.
- Do not create Report Data.
- Update any existing SAP data if any calculation value changes occur, even if the SAP status remains the same.
- Use Statuses and Actions rules when Pass 1 eligible.

  Therefore, ensure that all academic statuses are entered in the setup for Statuses and Actions rules, or the process might return an incorrect Calc SAP Status value.

In a batch process, these settings are optional and can be modified on the Process SAP run control page. To process SAP for a single student with different options than the online process uses, enter that ID in the Student Override section, and set the run control options as desired for that student.

Pass 1 and Pass 2 Evaluations

The SAP process evaluates SAP for each student two times, Pass 1 and Pass 2.

Pass 2 is optional when running in batch, but is always used online or in simulation. In batch, if the Pass 2 option is selected, the process calculates for both Pass 1 and Pass 2, and uses the Pass 2 calculation results unless Pass 1 data is not present. When Pass 2 is used, Statuses and Actions rules are not used to determine a calculated SAP status.

Pass 1 and Pass 2 data collection differ as follows:

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Pass 1	Pass 2
Pass 1 evaluates at the most recent SAP evaluated term/aid year where the fully graded date is less than or equal to today's date. If Statuses and Actions rules are enabled, they are used to determine calculated SAP status. That is, the maximum term (term processing) or terms within the aid year (aid year processing) after the fully graded date is used for the SAP evaluation. Only Pass 1 calculations are compared to prior term or aid year SAP records. The current Calc SAP Status code is first compared to the Override SAP Status code, if it exists. If an Override SAP Status code does not exist in the previous SAP record, the current Calc SAP Status code is compared to the previous SAP status. For example, an institution that processes by term runs the SAP process for fall 2005. If the setup is defined to evaluate the spring 2005 term, and the fully graded date for spring 2005 has passed, the SAP process uses spring 2005 term data to evaluate the SAP tests and rules to determine the SAP status. If the spring 2005 fully graded date is in the future, then there is no Pass 1 evaluation for the student. The current Calc SAP Status code is first compared to the Override SAP Status code, if it exists. If an Override SAP Status code does not exist in the previous SAP record, the current Calc SAP Status code is compared to the previous SAP status. When complete, the processing message of Pass 1 is displayed in the Student SAP page and indicates the term used.	Pass 2 finds the most recent term/aid year that should be evaluated based on the evaluation term/aid year setup. If that term/aid year is not available for the student, Pass 2 uses data from the most recent term of enrollment even if that term of enrollment is not part of the evaluation term/aid year setup initially evaluated in Pass 1. Statuses and Actions rules are not used in the Pass 2 calculation An example using term processing: an institution runs the SAP process for fall 2005. If the setup is defined to evaluate the spring 2005 term, and no row exists for a student for spring 2005, but a row exists for fall 2004, the SAP process uses fall 2004 to evaluate the SAP tests and rules to determine the SAP status. An example using aid year processing: an institution runs the SAP process for 2005. If the setup is defined to evaluate the fall 2004, spring 2005 term and summer 2005 and no rows exists for a student for any of those terms, but a row exists for spring 2004, the SAP process uses spring 2004 to evaluate the SAP tests and rules to determine the SAP status. When complete, the processing message of Pass 2 is displayed in the Student SAP page and indicates the term used. If an Override SAP Status code exists, it is not removed.

Setting Up SAP

The SAP Setup pages are used to set up your rules that determine an SAP status for each of the eight tests. The rules are designed to be failure rules. If a student's actual test value matches a setup rule, the test fails. If a student's actual test value does not meet a rule, the student receives the Career Pass Default Status code for that test. For better processing performance, keep the rules as simple as possible.

Use the remaining setup pages to set up course and award exclusions, communications, and evaluation terms and aid years.

This section discusses how to:

- Define SAP status codes.
- Set up rules for statuses and actions and the Academic Standing, Maximum Attempted Units, and Maximum Attempted Term tests.
- Set up tests for Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA.

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- Set up course, award, and grade exclusions.
- Set up SAP communications.
- Set up evaluation terms for aid year processing.
- Set up evaluation terms for term processing.
- Define SAP Application Engine libraries.

Pages Used to Set Up SAP

Page Name	Definition Name	Navigation	Usage
Setup	SFA_SAP_STATUS_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Setup**	Define SAP status codes, code severity, and default SAP status codes.
Criteria1	SFA_SAP_ACADST_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Criteria 1**	Set up statuses and actions. Set up rules for quantitative tests: Academic Standing, Max Attempted Units, and Max Attempted Terms.
Criteria2	SFA_SAP_ACADST_TB2	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Criteria 2**	Set up rules for qualitative tests: Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA.
Exclusions	SFA_SAP_GRADEBS_EX	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Exclusions**	Set up remedial and ESL course exclusions. Set up financial aid award exclusions. Set up grade exclusions.
Communications and Checklists	SFA_SAP_CMK_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Communications and Checklists**	Set up codes and message text for communicating results of tests.

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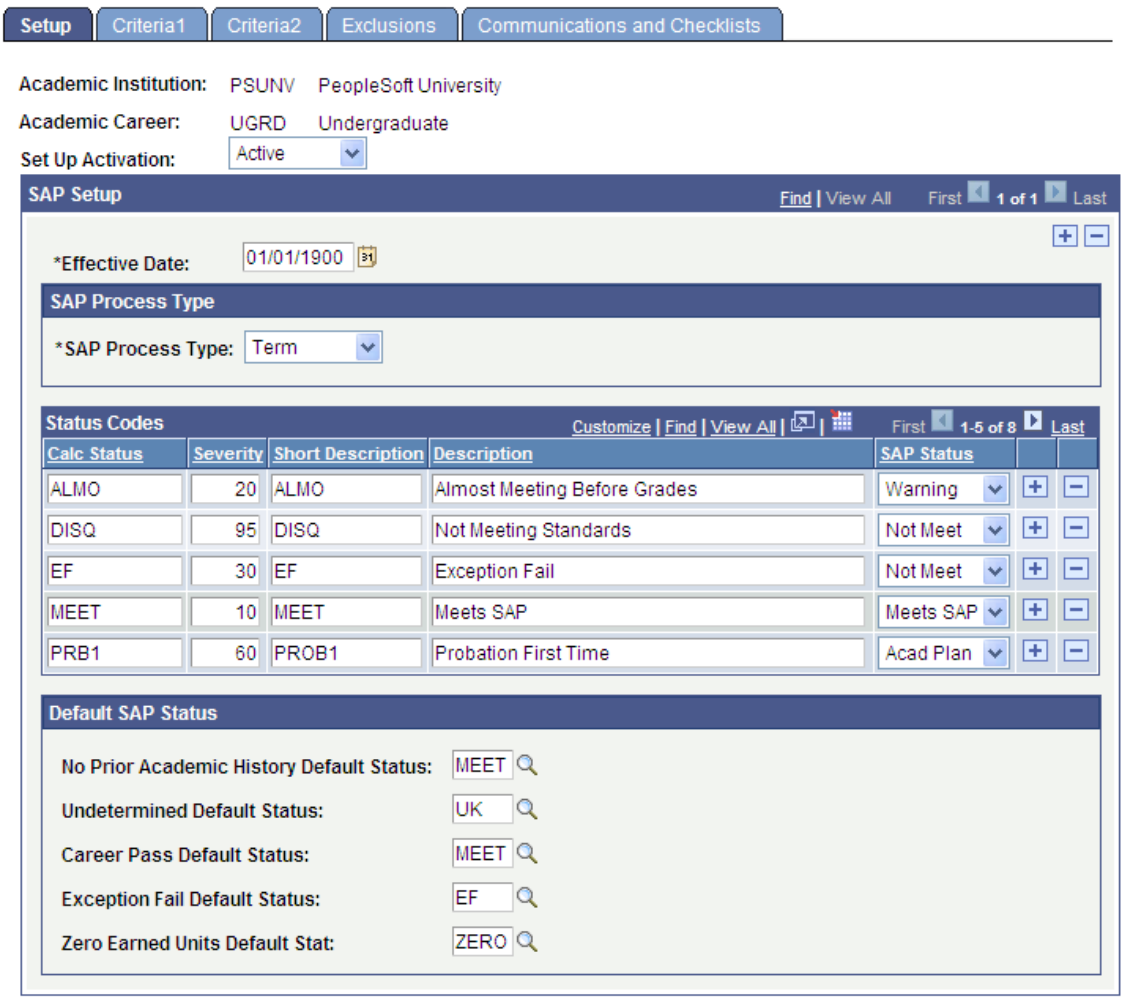
Page Name	Definition Name	Navigation	Usage
Define Evaluation Aid Year	SFA_SAP_ET_AYR	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Evaluation Aid Year**	Set up terms for evaluation aid year processing.
Define Evaluation Terms	SFA_SAP_ET_TRM	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Evaluation Terms**	Set up terms for evaluation term processing.
SAP AE Process Setup	SFA_SAP_AE_PROC	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define SAP AE Library**	Use delivered SAP processes for the eight tests, or create custom AE library sections for any of the eight SAP tests.

Defining SAP Status Codes

Access the Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Setup**).

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

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Use the Setup page to define, by institution and career, the SAP status codes and code severity, and how the SAP status updates the satisfactory academic progress value on the student's Packaging Status Summary page. To modify a status code, click the + icon to the right of the Effective Date field to create new setup criteria, and make the changes.

Ensure that this page is set up and saved before doing any further setup. Never delete SAP status codes after you start creating student SAP data because those codes would then be invalid in the Student SAP record.

The **Set Up Activation** field defines whether the SAP setup is active or inactive at this institution:

- When *any* of an **Academic Institution**'s careers has a **Setup Activation Field** value of *Active,* students have a **Satisfactory Academic Progress** field on the Packaging Status Summary page that is display-only with the **SAP Details** link shown.
- When *all* of an **Academic Institution**'s careers have a **Setup Activation Field** value of *Inactive* or are not defined, students have a **Satisfactory Academic Progress** field on the **Packaging Status Summary** page that is editable, and the **SAP Details** link is not shown.
- The online, batch, and simulation processes cannot run successfully for student SAP records in careers with a **Setup Activation Field** value of *Inactive.*

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SAP Process Type

The two process types are *Aid Year* and *Term.* Although it is not recommended to change from one process type to the other, you can insert a new row at the **Effective Date** field level and update the setup. The value in the **Effective Date** field determines which row is used compared to the current date.

Aid year processing is for multiple terms, which you define on the Define Evaluation Aid Year page.

Term processing is for a single term, which you define on the Define Evaluation Term page.

Status Codes

It is important that your SAP status codes are relevant and define your student population. Be sure you have a code that represents a passing status, such as MEET.

Field or Control	Description
Calc Status (calculated status)	Enter a four-character code for the default statuses, the calculated status for each test evaluation, and the overall status for the Statuses and Actions rules test.
Severity	Enter a number to control the priority of status codes and to determine the Calc SAP Status code for a student if the student has a different code for each test. The code with the highest severity number becomes the Calculated SAP Status code. Ensure that: • Each severity number is unique. • The most severe status code has the highest severity number assigned to it.
Short Description	Enter a brief description of the Calc Status code.
Description	Enter a detailed description of the Calc Status code.
SAP Status	Select a translate value to associate with Calc Status. The SAP Status is the status that appears in the **Satisfactory Academic Progress** field on the student's Packaging Status Summary page. To understand how these statuses are used by packaging and awarding: See Reviewing the Packaging Status Summary Page. • Academic Plan • Meets SAP • Not Meet • Probation • Undetrmine • Warning

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Default SAP Status

The SAP evaluation process assigns these default statuses for particular cases, as described below. For each of these default statuses, select a status code that you defined in the **Status Codes** group box.

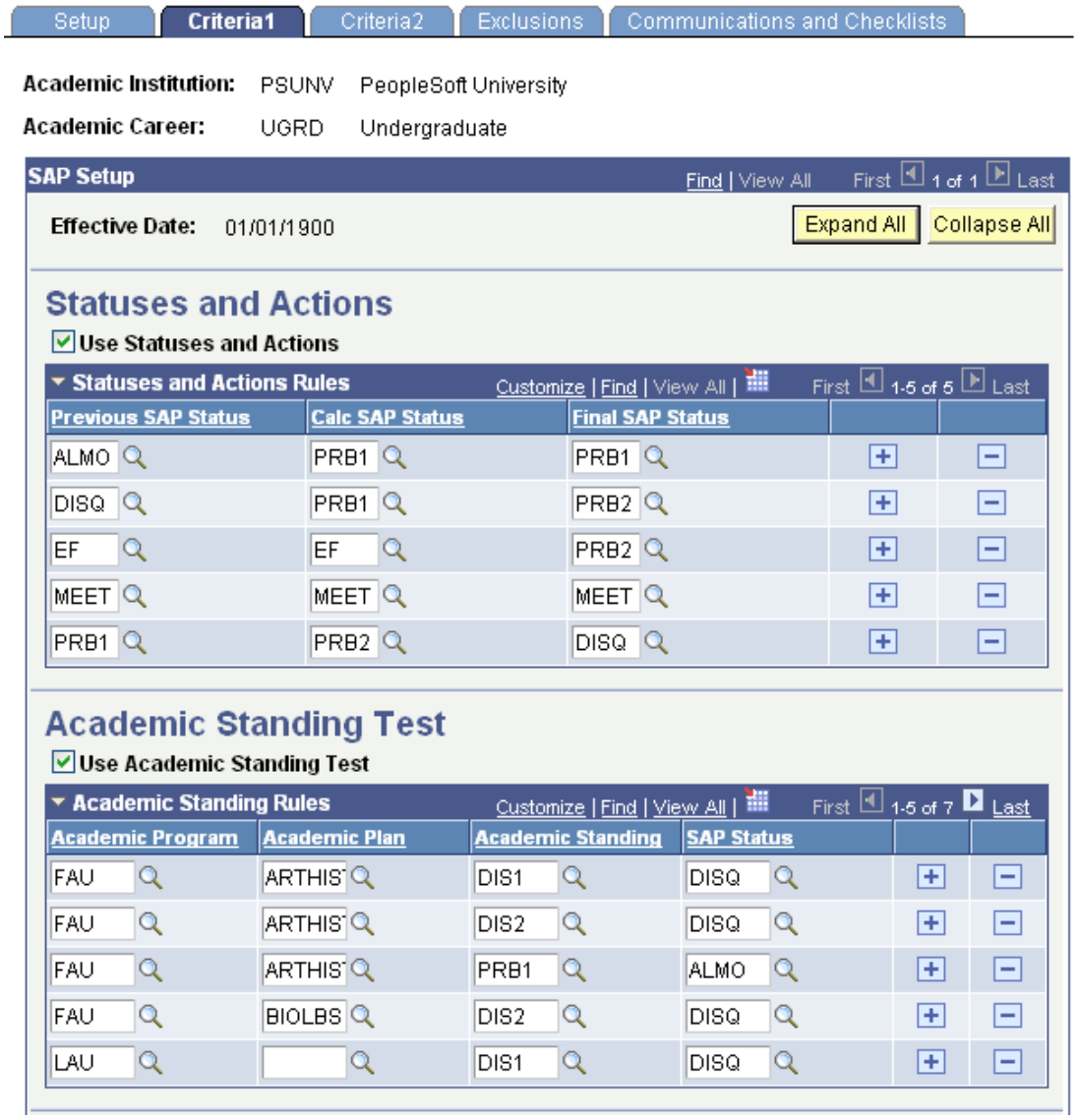
Field or Control	Description
No Prior Academic History Default Status	If a student does not have any prior student career term record data, this status is assigned.
Undetermined Default Status	If a calculation cannot be determined for a student due to missing information, this status is assigned to both the specific test and as the Overall Calculated SAP Status. Examples of missing information are: • No Special GPA when the **Use Special GPA Code** option is selected. • Academic Standing is blank. • There is no cumulative or current GPA.
Career Pass Default Status	If a student does not meet the rules of a particular test, then this status is assigned. Also, if a student has been evaluated for other tests but has no fail statuses for those tests, this status is assigned as the Calc SAP status.
Exception Fail Default Status	If a student has had any career, term, or aid year test exceptions defined and the test fails using these exceptions, then this status is assigned. The process checks for student-specific exceptions first. If the student has exceptions defined and the process does not fail using those exceptions, it then assigns the Career Pass Default Status and the test rules are not evaluated. It is recommended that the SAP Code associated with this default be the highest severity of the Not Meet status codes. For more information about defining student-specific exceptions: See Processing and Maintaining SAP.
Zero Earned Units Default Status	If a student's earned units is equal to 0 for either the **Current Earned Units** or **Cumulative Earned Units** calculation, this default status is assigned.

Setting Up Rules for Statuses and Actions and the Academic Standing, Maximum Attempted Units, and Maximum Attempted Term Tests

Access the Criteria1 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Criteria 1**).

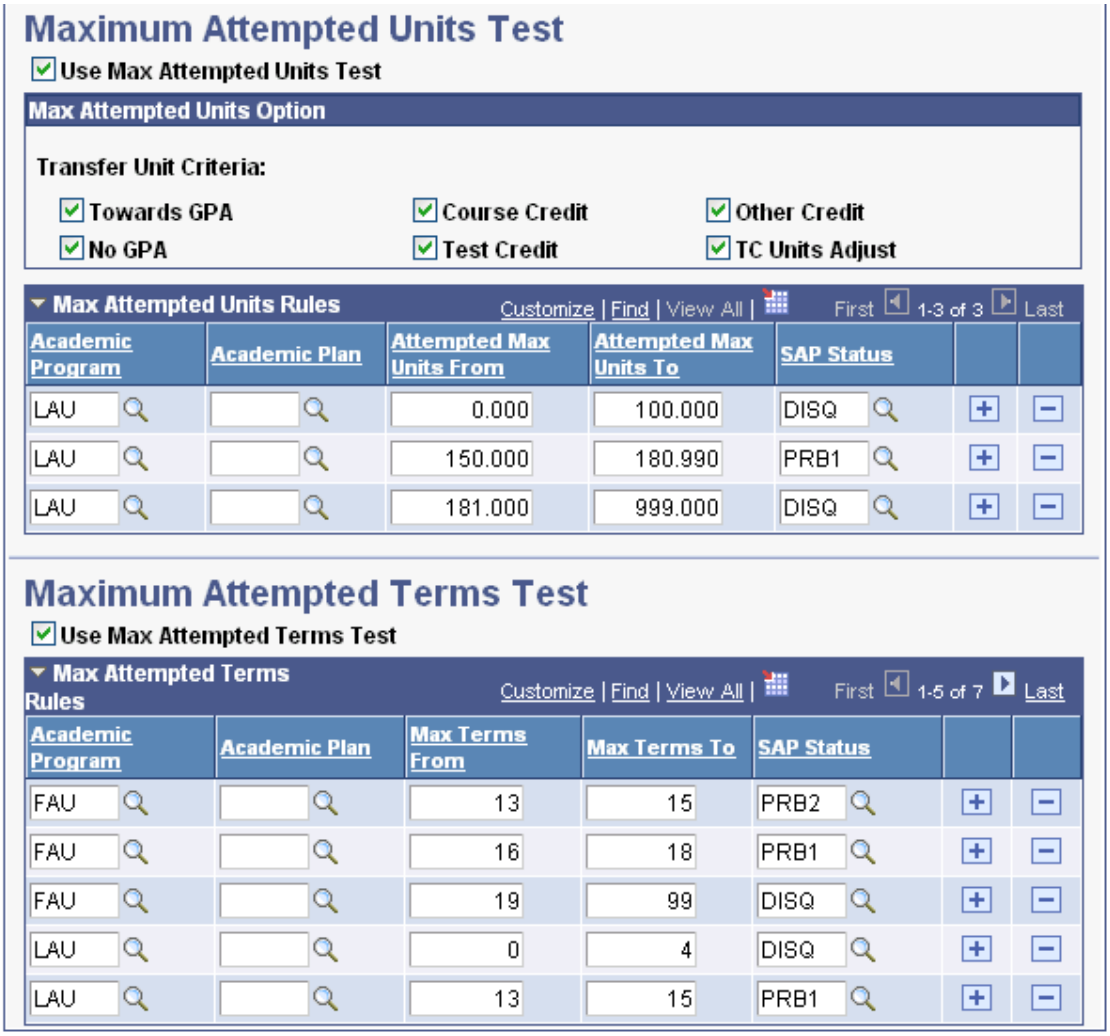
This example illustrates the fields and controls on the Criteria1 page (1 of 2). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Criteria1 page (2 of 2). You can find definitions for the fields and controls later on this page.

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Use the Criteria1 page to define your quantitative SAP requirements. You set up rules that determine how to set a final status based on a previously calculated status and a currently calculated status. You also set the rules and options for three of the eight SAP tests.

Click the **Expand All** button to expand all enabled tests and their corresponding rule grids for this effective dated row. Click the **Collapse All** button to collapse the tests. Or, use the expand/collapse arrow on each test to expand the grid for only that test.

> **Warning**
>
> You specify from-to ranges for attempted terms and units on this page. If the ranges overlap from one row to another in such a way that the system cannot determine only one SAP status for the specific rule for a particular Academic Program and Academic Plan, the Process SAP process abnormally ends with no results and the log indicates an SQL duplicate error. See specific warnings in the following field definitions.

Statuses and Actions

Select the **Use Statuses and Actions** check box to use this feature and set up rules. When using Statuses and Actions rules, make sure that all possible statuses and actions are set up.

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The Statuses and Actions rules feature is always executed for Pass 1 online process and is an option in batch, when enabled.

Field or Control	Description
Previous SAP Status	Select the most recently calculated term or aid year status value to be evaluated.
Calc SAP Status (calculated SAP status)	Select the current SAP Calculated Status code.
Final SAP Status	Select the Overall SAP Status Code for term or aid year to be assigned if a student's **Previous SAP Status** and **Calc SAP Status** match the values selected in this row.

If the process cannot find a rule match for previous and calculated status, the final status that is generated may be incorrect. Therefore it is important to ensure that all possible statuses and actions are set up. Blank setup values are not allowed. Statuses and Actions rules are only evaluated for Pass 1 processing.

Academic Standing Test

The **Academic Standing Rules** group box indicates which academic standing values used by **Academic Careers, Academic Program,** and **Academic Plan** are not meeting **Academic Standing** and may be ineligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing Academic Standing statuses and non-passing SAP Statuses.

Select the **Use Academic Standing Test** check box to set up rules for the Academic Standing test.

Field or Control	Description
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan** field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Academic Standing	Select an **Academic Standing** status in the context of the academic program (and academic plan, if selected) to associate with a SAP Status. If blank or a row for the term does not exist, the Undetermined Default Status code is used.
SAP Status	Select the SAP Status to use if the **Academic Standing** value from Student Records matches this setup.

Maximum Attempted Units Test

The Maximum Attempted Units test defines maximum units a student can attempt before their SAP status is affected. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

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Select the **Use Max Attempted Units Test** check box to set up rules for the Maximum Attempted Units test.

In the **Max Attempted Units Option** group box, select the transfer unit criteria to include in the maximum attempted unit total. You can select any combination of the following check boxes, or select none.

Field or Control	Description
Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined as included in GPA in the maximum attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined as not to be included in the GPA maximum attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA maximum attempted units count.
Test Credit	Select this check box to include test credits in the maximum attempted units count.
Other Credit	Select this check box to include other credits in the maximum attempted units count.
TC Units Adjust (transfer credit units adjust)	Select this check box to subtract TC Units Adjust amount from the maximum attempted units count.
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan** field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Attempted Max Units From (attempted maximum units from)	Enter the starting number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the starting number, it is included in the range. **Warning!** The **Attempted Max Units From** field and **Attempted Max Units To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same academic program or academic plan. Your number ranges can overlap if they apply to different academic programs or academic plans.

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Field or Control	Description
Attempted Max Units To (attempted maximum units to)	Enter the ending number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the ending number, it is included in the range.
SAP Status	Select the SAP status code to use when the student's attempted units value falls within the range of this rule. The ranges and statuses set here are to find students who are not making progress.

Maximum Attempted Terms Test

The Maximum Attempted Terms test defines the maximum terms a student can enroll in before their SAP status is affected. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the **Use Max Attempted Terms Test** check box to set up rules for the Maximum Attempted Terms test.

Field or Control	Description
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan** field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Max Terms From (maximum terms from)	Enter the starting number for the range of terms that a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the starting number, it is included in the range. **Warning!** The **Max Terms From** field and **Max Terms To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans.
Max Terms To (maximum terms to)	Enter the ending number for range of terms a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.

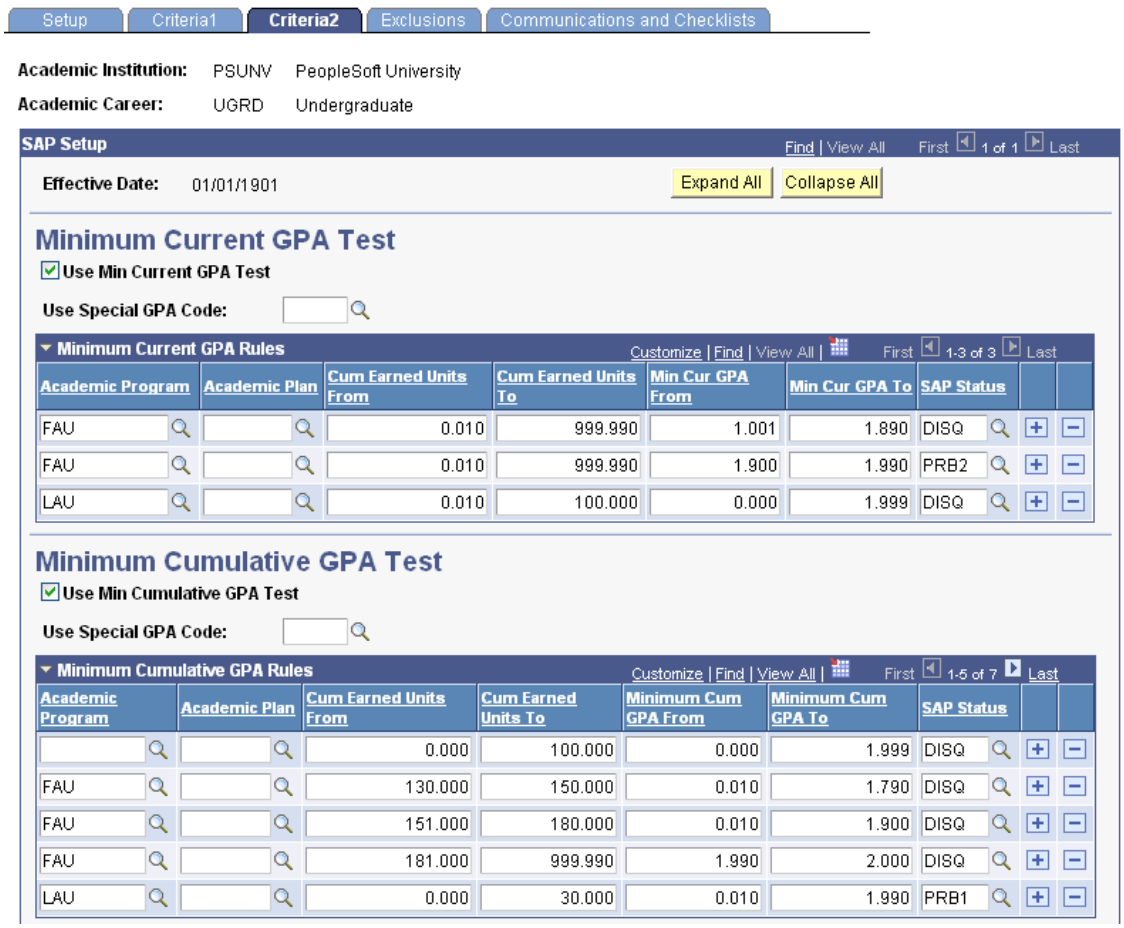
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Field or Control	Description
SAP Status	Select the SAP status code to use when the student's attempted terms value falls within the range of this rule. The ranges and statuses set here are to find students who are not making progress.

Setting Up Tests for Minimum Current or Cumulative GPA, Current or Cumulative Earned Units, and Two-Year GPA

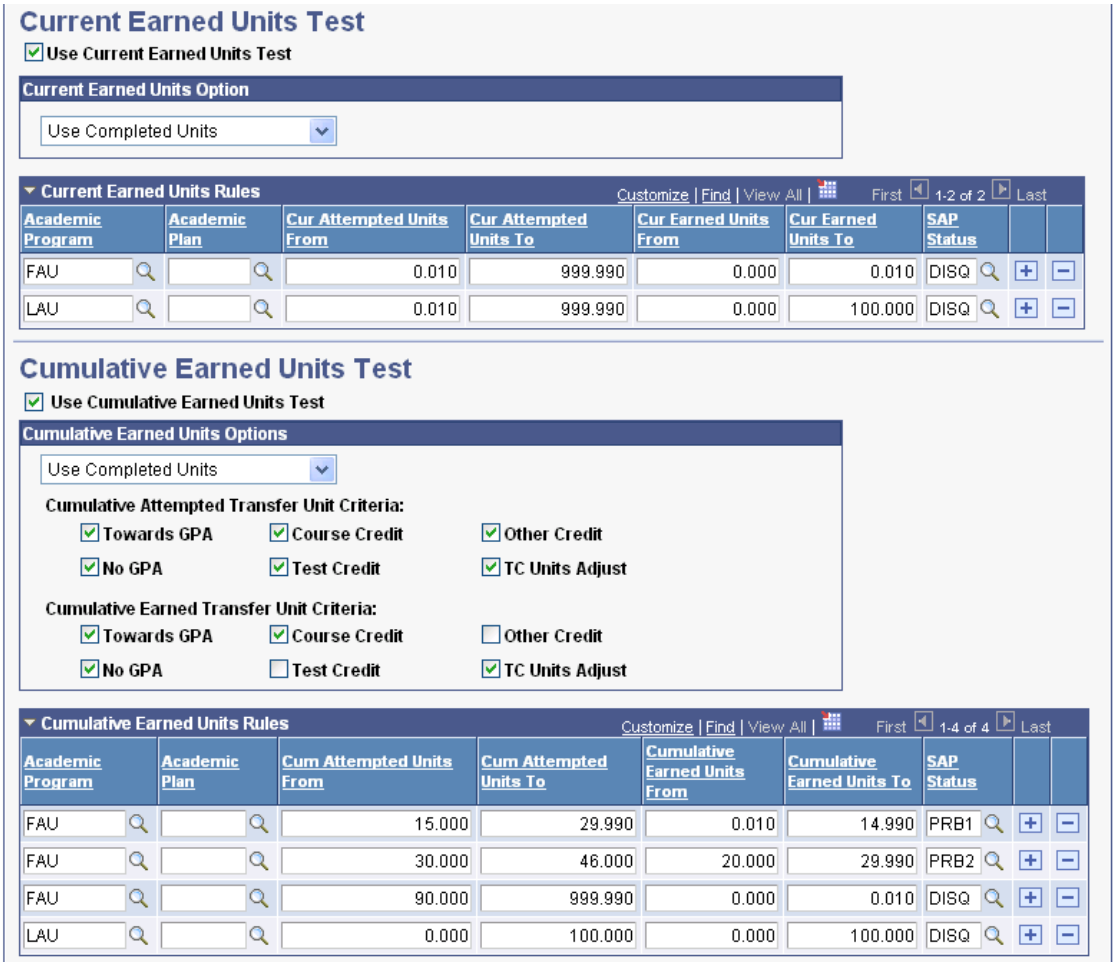
Access the Criteria2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Criteria 2**).

This example illustrates the fields and controls on the Criteria2 page (1 of 3). You can find definitions for the fields and controls later on this page.

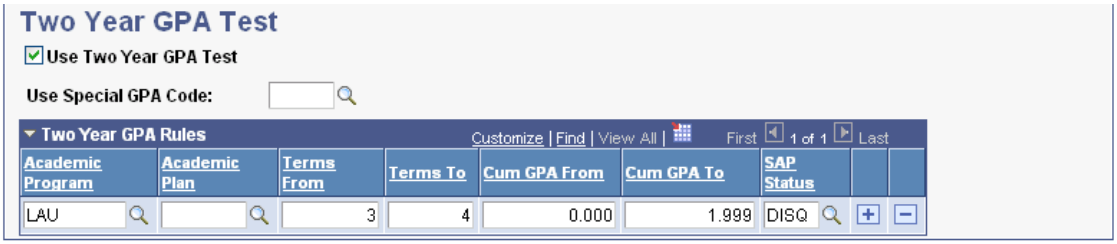


This example illustrates the fields and controls on the Criteria2 page (2 of 3). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Criteria2 page (3 of 3). You can find definitions for the fields and controls later on this page.



Use the Criteria2 page to define your qualitative SAP requirements and the rules for four of the eight SAP tests.

Click the **Expand All** button to expand all enabled tests and their corresponding rule grids for this effective dated row. Click the **Collapse All** button to collapse the tests. Or, use the expand or collapse arrow on each test to expand the grid for only that test.

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> **Warning**
>
> You specify from-to ranges for the five tests on this page. If the ranges overlap from one row to another in such a way that the system cannot determine only one SAP status for the specific rule for a particular Academic Program and Academic Plan, the Process SAP process abnormally ends with no results and the log indicates an SQL duplicate error. See specific warnings in the following field definitions.

Minimum Current GPA Test

The Minimum Current GPA test determines the lowest current GPA that a student can have and still be eligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the **Use Min Current GPA Test** check box to set up rules for the Minimum Current GPA test.

Field or Control	Description
Use Special GPA Code	Select a value in this field to use a student's Special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used. If the **Special GPA** field is populated, but does not exist, the Undetermined Default Status code is used.
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan** field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are*only* evaluated for those specific rules.
Cum Earned Units From (cumulative earned units from)	Enter the minimum value of the range of earned (passed) units to identify the minimum GPA range used to determine which SAP status should be used. **Warning!** The **Cum Earned Units From** field and **Cum Earned Units To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same academic program or academic plan. Your number ranges can overlap if they apply to different academic programs or academic plans or if your minimum current GPA range is different between rows.
Cum Earned Units To (cumulative earned units to)	Enter the maximum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.

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Field or Control	Description
Min Cur GPA From (minimum current GPA from)	Enter the minimum value of the range of minimum current GPA used to determine the SAP status. **Warning!** The **Min Cur GPA From** field and **Min Cur GPA To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units range is different between rows.
Min Cur GPA To (minimum current GPA to)	Enter the maximum value of the range of Minimum Current GPA used to determine the SAP status.
SAP Status	Select the SAP Status code to use if a student meets the rules of this test. The ranges and statuses set here are to find students who are not making progress.

Minimum Cumulative GPA Test

The Minimum Cumulative GPA test determines the lowest cumulative GPA that a student can have and still be eligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the **Use Min Cumulative GPA Test** check box to set up rules for the Minimum Cumulative GPA test.

Field or Control	Description
Use Special GPA Code	Select a value in this field to use a student's special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used. If the **Special GPA** field is populated, but does not exist, the Undetermined Default Status code is used.
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan** field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are*only* evaluated for those specific rules.

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Field or Control	Description
Cum Earned Units From (cumulative earned units from)	Enter the minimum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status. **Warning!** The **Cum Earned Units From** field and **Cum Earned Units To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your minimum cumulative GPA range is different between rows.
Cum Earned Units To (cumulative earned units to)	Enter the maximum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.
Minimum Cum GPA From (minimum cumulative GPA from)	Enter the minimum value of the range of minimum cumulative GPA used to determine the SAP status. **Warning!** The **Minimum Cum GPA From** field and **Minimum Cum GPA To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units range is different between rows.
Minimum Cum GPA To (minimum cumulative GPA to)	Enter the maximum value of the range of minimum cumulative GPA used to determine the SAP status.
SAP Status	Indicate which SAP Status code to use if a student meets the rules of this test. The ranges and statuses set here are to find students who are not making progress.

Current Earned Units Test

The Current Earned Units test evaluates the student's attempted units and earned units and compares the quotient (earned/attempted) to the rules. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses. Define the percent or minimum number of current term or aid year units a student must complete of attempted units per term.

Select the **Use Current Earned Units Test** check box to set up rules for the Current Earned Units test.

In the **Current Earned Units Option** list, select whether to use percentage or units:

- Select *Use Percentage* to use the percentage of completed units for the current term or aid year.

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- Select *Use Completed Units* to use a minimum number of units to be completed for the current term, by term or aid year.

Fields for the Current Earned Units test change depending on the option that you select. For example, if you select *Use Percentage,* the **Cur Earned Units % From** and **Cur Earned Units % To** fields appear.

Field or Control	Description
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan**field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Cur Attempted Units From (current attempted units from)	Enter the minimum current value of the range of attempted units to identify the minimum percentage or number range used to determine the SAP status. **Warning!** The **Cur Attempted Units From** field and **Cur Attempted Units To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your current earned units (% or number) range is different between rows.
Cur Attempted Units To (current attempted units to)	Enter the maximum current value of the range of attempted units to identify the maximum percentage or number range used to determine the SAP status.
Cur Earned Units % (or Number) From (current earned units percentage [or number] from)	Enter the minimum value of the range of current earned (passed) percentage or number used to determine the SAP status. **Warning!** The **Cur Earned Units % (or Number) From** field and **Cur Earned Units % (or Number) To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your current attempted units range is different between rows.
Cur Earned Units % (or Number) To (current earned units percentage [or number] to)	Enter the maximum value of the range of current earned (passed) percentage or number used to determine the SAP status.

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Field or Control	Description
SAP Status	Select the SAP status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Cumulative Earned Units Test

For the Cumulative Earned Units test, you define the percent or minimum number of units a student must complete of attempted units per term. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the **Use Cumulative Earned Units Test** check box to set up rules for the Cumulative Earned Units test.

In the **Use Cumulative Earned Units Options** drop-down list, select whether to use percentage or completed units for term or aid year processing:

- *Use Percentage:* Use the percentage of completed units for the current term or aid year.
- *Use Completed Units:* Use a minimum number of units to be completed.

For Cumulative Attempted Transfer Unit Criteria, select the transfer unit criteria check boxes to include in the cumulative attempted unit total. You can select any combination of boxes, or select none.

Field or Control	Description
Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined to be included in GPA in the cumulative attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined to not be included in GPA cumulative attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA cumulative attempted units count.
Test Credit	Select this check box to include test credits in the cumulative attempted units count.
Other Credit	Select this check box to include other credits in the cumulative attempted units count.
TC Units Adjust (transfer credit units adjust)	Select this check box to subtract TC Units Adjust amount from the cumulative attempted units count.

For Cumulative Earned Transfer Unit Criteria, select the transfer unit criteria check boxes to include in the cumulative earned unit total. You can select any combination of boxes, or select none.

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Field or Control	Description
Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined to be included in GPA in the maximum attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined to not be included in GPA maximum attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA maximum attempted units count.
Test Credit	Select this check box to include test credits in the maximum attempted units count.
Other Credit	Select this check box to include other credits in the maximum attempted units count.
TC Units Adjust (transfer credit units adjust)	Select this check box to subtract TC Units Adjust amount from the maximum attempted units count.

Field or Control	Description
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan** field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Cum Attempted Units From (cumulative attempted units from)	Enter the cumulative minimum value for the range of attempted units (minimum percentage or number range) used to determine the SAP status. **Warning!** The **Cum Attempted Units From** field and **Cum Attempted Units To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units (% or number) range is different between rows.
Cum Attempted Units To (cumulative attempted units to)	Enter the cumulative maximum value for the range of attempted units (minimum percentage or number range) used to determine the SAP status.

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Field or Control	Description
Cumulative Earned Units % (or Number) From (cumulative earned units percentage [or number] from)	Enter the minimum value of the range of cumulative earned (passed) percentage or number used to determine the SAP status. **Warning!** The **Cum Earned Units % (or Number) From** field and **Cumulative Earned Units % (or Number) To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative attempted units range is different between rows.
Cumulative Earned Units % (or Number) To (cumulative earned units percentage [or number] to)	Enter the maximum value of the range of cumulative earned (passed) percentage or number used to determine the SAP status.
SAP Status	Select the SAP Status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Two Year GPA Test

Select the **Use Two Year GPA Test** check box to set up rules for the Cumulative Earned Units test.

Field or Control	Description
Use Special GPA Code	Select a value in this field to use a student's Special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used. If the **Special GPA** field is populated, but does not exist, the Undetermined Default Status code is used.
Academic Program	Select a value in the **Academic Program** field for an additional level of evaluation. If this field is populated, and the **Academic Plan** field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the **Academic Plan** field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.

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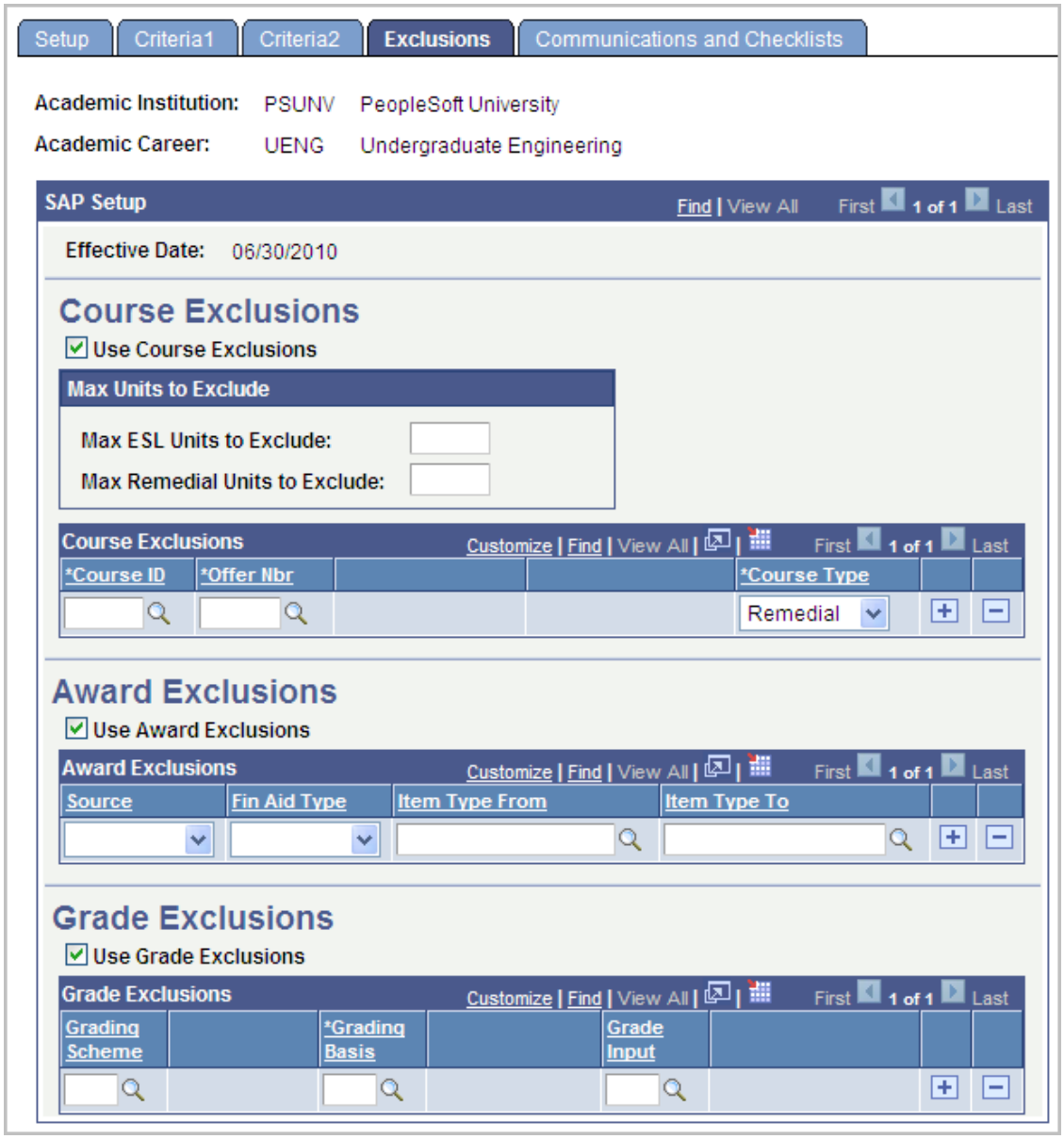
Field or Control	Description
Terms From	Enter the starting number for the range of terms that a student can attempt for a corresponding status code. The numbers are inclusive. If 10 is the starting number, it is included in the range. **Warning!** The **Terms From** field and **Terms To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative GPA range is different between rows. The **Terms From** value can be the same as the **Terms To** value within the same row.
Terms To	Enter the ending number for range of terms a student can attempt for a corresponding status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.
Cum GPA From (cumulative GPA from)	Enter the beginning value of the range of cumulative GPA used to determine the SAP status. **Warning!** The **Cum GPA From** field and **Cum GPA To** field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your terms range is different between rows.
Cum GPA To (cumulative GPA to)	Enter the ending value of the range of cumulative GPA used to determine the SAP status.
SAP Status	Select the SAP Status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Setting Up Course, Award, and Grade Exclusions

Access the Exclusions page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Exclusions**).

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

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Use the Exclusions page to identify English as a Second Language (ESL) and remedial courses for exclusions and place caps on the number of ESL and remedial courses to exclude for calculating Maximum Attempted Units. Identify student records to exclude from the SAP selection process based on types of awards and/or identify grades to exclude from cumulative and current earned units calculation.

Course Exclusions

Course Exclusions are used in the Maximum Attempted Units Test to identify ESL and remedial courses that should be excluded in the count and to also place caps on the number of ESL and remedial courses to exclude from the unit count.

Select the *Use Course Exclusions* check box to set up rules for Max Units to Exclude and Course Exclusions.

The **Max Units to Exclude** (maximum units to exclude from all course exclusions) group box has two selections.

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Field or Control	Description
Max ESL Units to Exclude (maximum ESL units to exclude)	Enter the maximum number of units to be excluded from the Maximum Attempted Units test regardless of number attempted. If no limit exists for the number that can be excluded, leave the field blank. If a student has more ESL units than the maximum set here, only the maximum number is excluded. There must be at least one course entered with the **Course Type** of *ESL* in the **Course Exclusions** grid for this maximum to be invoked.
Max Remedial Units to Exclude (maximum remedial units to exclude)	Enter the maximum number of units to be excluded from the Maximum Attempted Units test regardless of number attempted. If no limit exists for the number that can be excluded, leave the field blank. If a student has more remedial units than the maximum set here, only the maximum number is excluded. There must be at least one course entered with the course type of *Remedial* in the **Course Exclusions** grid for this maximum to be invoked.

Course Exclusions are criteria for excluding courses from the Maximum Attempted Units test. Excluded courses include Remedial courses or ESL courses.

Field or Control	Description
Course ID	Select the course ID of the class to exclude from the Maximum Attempted Units test calculation regardless of grade.
Offer Nbr (offer number)	Select the course offer number of each class to exclude from the Maximum Attempted Units test calculation regardless of grade. To totally exclude the class, the course offer number must be included.
Course Type	Select the type of class, *Remedial* or *ESL*.

Award Exclusions

Award Exclusions are criteria for excluding students from the selection for an SAP evaluation based on an aid type or specific awards you specify.

Select the **Use Award Exclusions** check box to use this function.

Field or Control	Description
Source	Select a fund source. This field is informational only. There is no system logic using this selection.
Fin Aid Type (financial aid type)	Select a financial aid type to exclude students who only have awards with that financial aid type from the SAP evaluation selection.

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Field or Control	Description
Item Type From and **Item Type To**	Select the beginning and end of a range of financial aid item types, to exclude students who have awards from only those item types, from the SAP evaluation selection.

Grade Exclusions

Grade Exclusions are criteria for excluding course units with specific grading schemes, grading basis, and grade input values from the Current Earned Unit and/or Cumulative Earned Units tests.

If you use Grade Exclusions, the Current and Cumulative Earned Units values are derived from the student's enrollment, minus the units to be excluded. If you do not use Grade Exclusions, the Current and/or Cumulative Units value is derived from the student's Career Term data.

You must set up any and all course grades that you do not want to be counted toward earned units, including Failing grades.

> **Warning**
>
> Some schools may have "blank" grading schemes in Student Enrollment as a result of migrating to from earlier versions of Campus Solutions. If you have grades intended to be excluded that fall in this category, you must enter them in the Grade Exclusion setup as 'blank' Grading Schemes with the associated Grading Basis and Grade Input.

Select the **Use Grade Exclusions** check box to use this function.

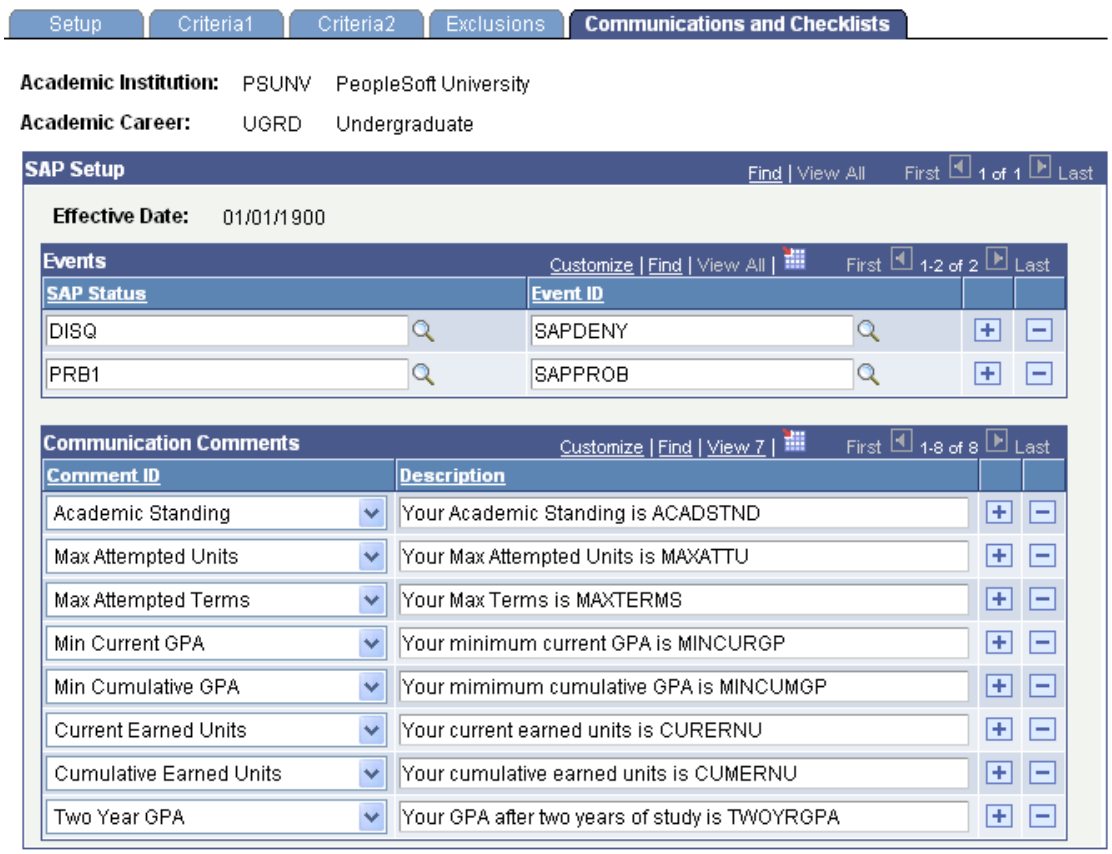
Field or Control	Description
Grading Scheme	Enter the Grading Scheme to be used to define the Grading Basis and Grade Input for exclusion from the Current Earned Unit and/or Cumulative Earned Units tests.
Grading Basis	Enter the Grading Basis to be used to define the Grade Input for exclusion from the Current Earned Unit test, the Cumulative Earned Units test, or both tests.
Grade Input	Enter the Grade Input to be excluded from the Current Earned Unit and/or Cumulative Earned Units tests.

Setting Up SAP Communications

Access the Communications and Checklists page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Communications and Checklists**).

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

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The Create SAP Communications process updates the 3C Trigger table in Campus Community. This process utilizes two Administrative Functions, FINA and FINT, depending on the SAP processing type. Aid Year processing SAP data requires the use of the FINA Administrative Function, which consists of the variable data field of Aid Year. Term processing SAP data requires the use of the FINT Administrative Function which consists of the variable data fields Aid Year and Term.

When setting up SAP Communications in Campus Community each processing type (Aid Year and Term) must have its own separate, unique communications set up. You must set up your communications to use the correct Administrative Function for the processing type; otherwise the 3C Engine does not create the communications correctly.

See Campus Community Fundamentals: Understanding the 3C Engine.

See Campus Community Fundamentals: Understanding Communications Setup.

See Campus Community Fundamentals: Understanding Communication Management.

Events

Field or Control	Description
SAP Status	Select the SAP status code.

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Field or Control	Description
Event ID	Select the event ID. The event ID contains the Communication and Checklist Code/Item to be assigned and is set up under Campus Community. See Campus Community Fundamentals: Naming an Event.

Communication Comments

Field or Control	Description
Comment ID	Select an SAP Test for which you want comments inserted into the 3C Trigger table. Comment ID values are associated with the eight SAP tests. If the comment ID for a particular test is set up here, the SAP 3C process generates a comment in the 3C Trigger table by student for each test that the student has failed. If the student fails multiple tests, multiple comments are appended into one comment and inserted into the communication comment field on the 3C Trigger table.
Description	Enter the text for the comment ID in this free-form field to create specific messages to students who fail one of the eight SAP evaluation tests. To include the student's actual failed data value from the Student SAP page in the comment, use the desired Hardcode Variable from the following table when entering your comment text.

Comment ID and Variables

The following table details the Comment ID values, variables, and examples of Description entries and resulting comments. The Comment ID values are the same as the field names from the **Actual**column on the Student SAP page.

Comment ID	Hardcode Variable	Example Description	Example Comment
Academic Standing	ACADSTND	Your current academic standing is ACADSTND.	Your current academic standing is DISQ.
Cumulative Earned Units	CUMERNU	The cumulative unit amount you have earned, CUMERNU, does not meet our requirements.	The cumulative unit amount you have earned, 19.000, does not meet our requirements.
Current Earned Units	CURERNU	CURERNU is the amount of your current earned units.	8.000 is the amount of your current earned units.
Max Attempted Terms	MAXTERMS	The number of terms you have attempted at PeopleSoft University is MAXTERMS.	The number of terms you have attempted at PeopleSoft University is 10.000.

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Comment ID	Hardcode Variable	Example Description	Example Comment
Max Attempted Units	MAXATTU	You have attempted MAXATTU units at PeopleSoft University.	You have attempted 12.00 units at PeopleSoft University.
Min Cumulative GPA	MINCUMGP	Your cumulative GPA is MINCUMGP.	Your cumulative GPA is 1.125.
Min Current GPA	MINCURGP	Your GPA for fall semester is MINCURGP; this does not meet university requirements.	Your GPA for fall semester is 1.013; this does not meet university requirements.
Two Year GPA	TWOYRGPA	Your GPA after two years of study is TWOYRGPA.	Your GPA after two years of study is 1.109.

Setting Up Evaluation Terms for Aid Year Processing

Access the Define Evaluation Aid Year page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Evaluation Aid Year**).

This example illustrates the fields and controls on the Define Evaluation Aid Year page. You can find definitions for the fields and controls later on this page.



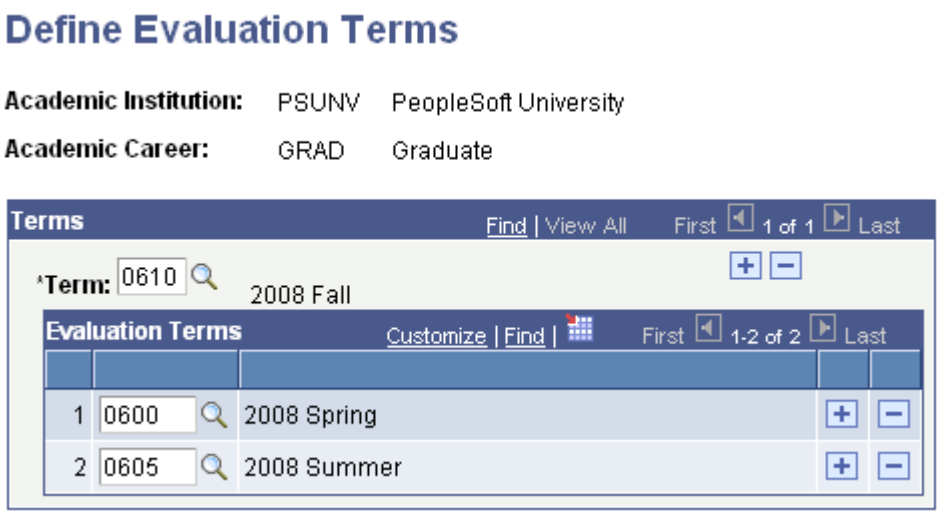
Use this page to select terms for aid year processing for the selected aid year. The **Evaluation Terms** field prompts a list of all terms defined at your institution.

Setting Up Evaluation Terms for Term Processing

Access the Define Evaluation Terms page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Evaluation Terms**).

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This example illustrates the fields and controls on the Define Evaluation Terms page. You can find definitions for the fields and controls later on this page.



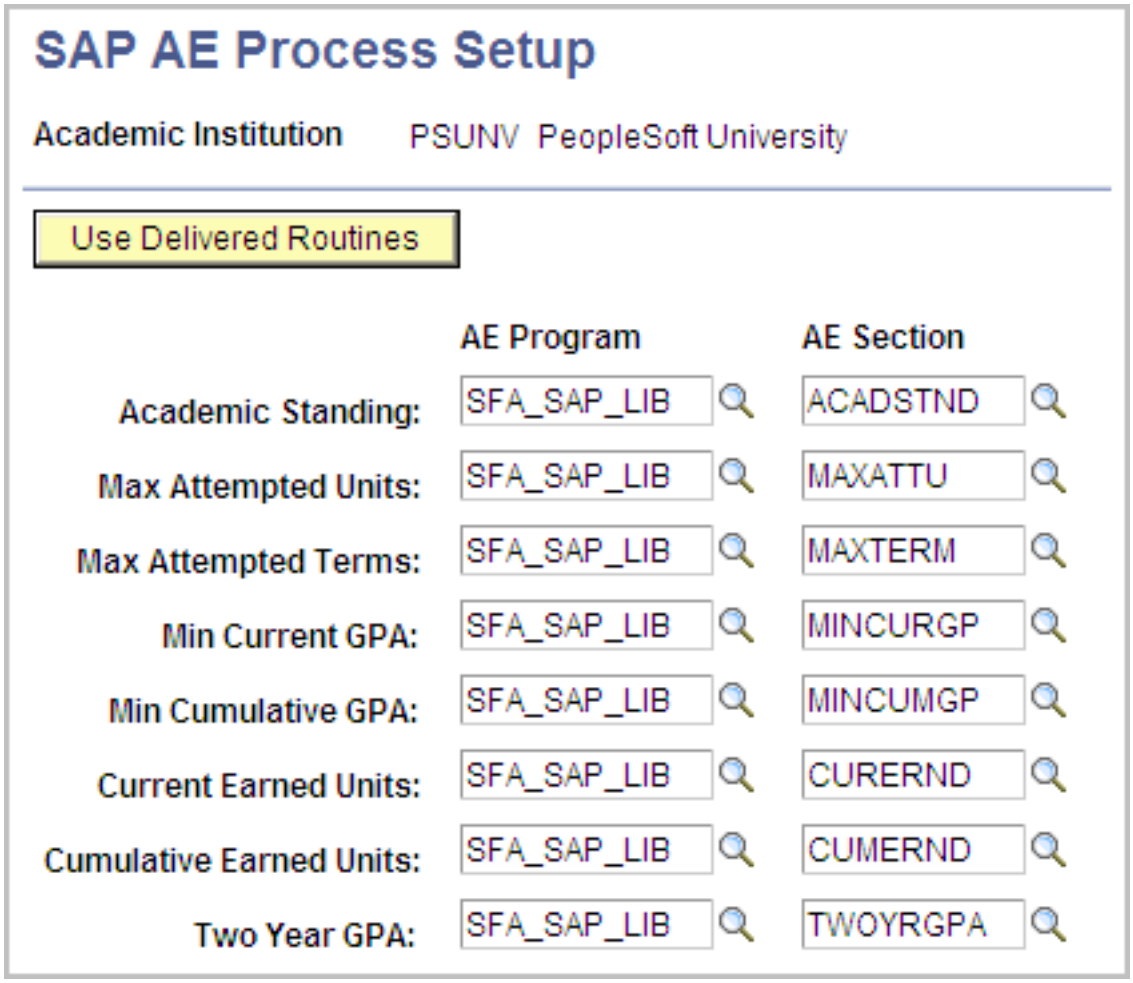
Use this page to select terms for term processing for the selected aid year. The **Evaluation Terms** field prompts a list of all terms defined at your institution.

Defining SAP Application Engine libraries.

Access the SAP AE Process Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define SAP AE Library**).

This example illustrates the fields and controls on the SAP AE Process Setup page. You can find definitions for the fields and controls later on this page.

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Use this page to specify which Application Engine application library sections you want to use for each of the eight SAP test.

The SAP feature was designed and structured to be a modular program. Each of the eight delivered SAP tests is enclosed in its own Application Engine application library section. You can implement custom AE library sections to perform the desired SAP test logic for any of the eight SAP tests instead of using the delivered AE library sections.

Field or Control	Description
Use Delivered Routines	Click this button to reset all of the AE Program and AE Sections to the delivered definitions.
AE Program Application Engine program	This value defaults to the delivered program. If you have created a custom Application Engine program for this test, enter the value here.
AE Section Application Engine section	This value defaults to the delivered program. If you have created a custom Application Engine application library section for this test, enter the value here after selecting the Application Engine program.

For more information on customizing the eight SAP tests:

See *Customizing SAP Developers Guide* in My Oracle Support (ID 1982666.1).

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Processing and Maintaining SAP

This section discusses how to:

- Run the SAP batch process.
- Maintain student SAP.
- View the **Satisfactory Academic Progress** field.
- Define student-specific career exceptions.
- Define student-specific aid year exceptions or term exceptions.
- Create SAP communications.
- Simulate a student SAP calculation.
- Review students from a batch run.

> **Note**
>
> When running an online, batch, or simulated SAP process, there must be an active FA Term row for either the aid year or the term being processed. Also, ensure that the Set Up Activation field is set to *Active* on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

Pages Used to Process and Maintain SAP

Page Name	Definition Name	Navigation	Usage
Process SAP	SFA_RUN_SAP	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Process SAP**	Run the batch SAP process. The setup must have a status of active for the process to execute successfully.
Student SAP	SFA_SAP_STDNT	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Maintain Student SAP Data**, and then **Student SAP**	Run the SAP process for an individual student, view SAP calculated values, set student level exclusions, and set the use of the Override SAP Status. The setup must have a status of active for the process to execute successfully.
Packaging Status Summary	STDNT_AID_PACKAGE	Click the **Packaging Status Summary** link from the Student SAP page.	View the **Satisfactory Academic Progress** field value.

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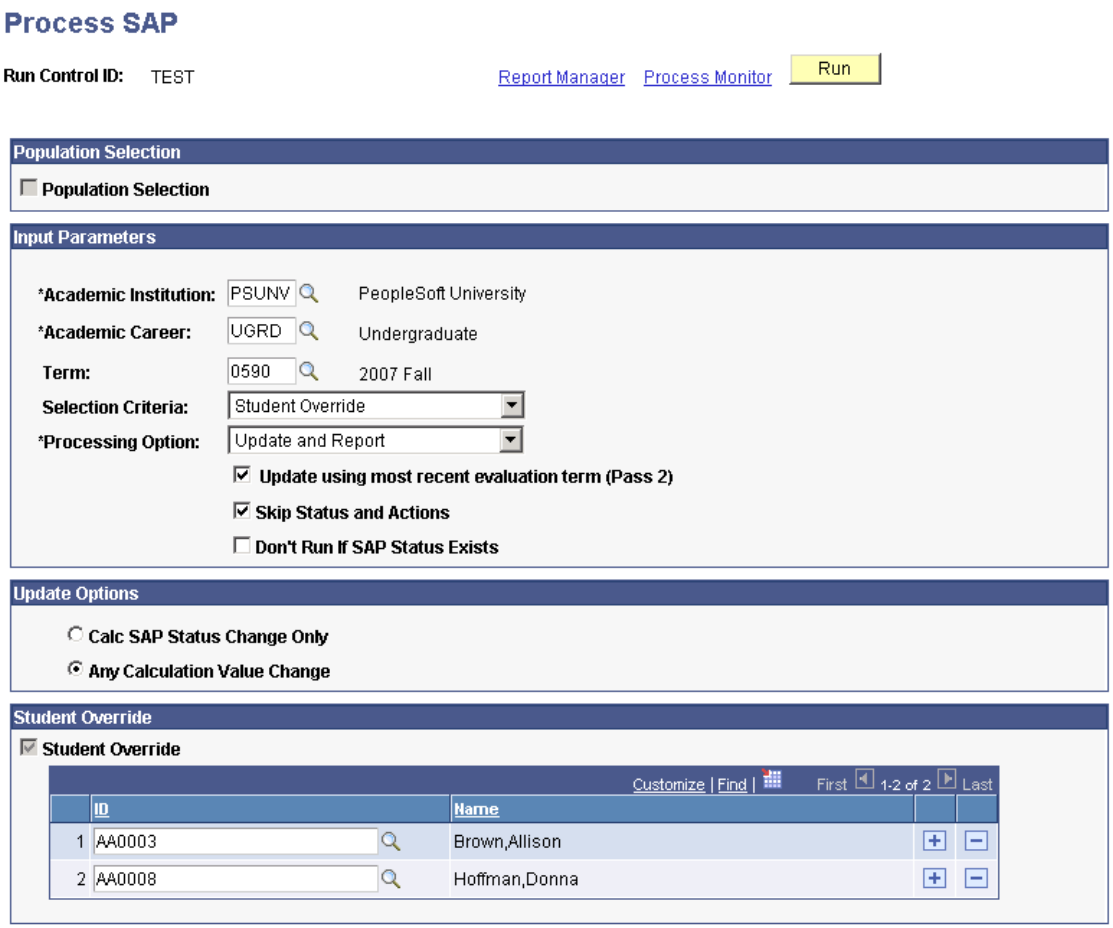
Page Name	Definition Name	Navigation	Usage
Career Exceptions	SFA_SAP_STDNT2	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Maintain Student SAP Data**, and then **Career Exceptions**	Define exceptions at the student level.
Term Exceptions (Page visibility depends on SAP Career level setup)	SFA_SAP_STDNT3	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Maintain Student SAP Data**, and then **Term Exceptions**	Define exceptions at the student level for term processing.
Aid Year Exceptions (Page visibility depends on SAP Career level setup)	SFA_SAP_STDNT4	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Aid Year Exceptions**	Define exceptions at the student level for aid year processing.
Create SAP Communications	SFA_RUN_SAP3C	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Create SAP Communications**	Set up event triggers for 3C communications.
Simulate Student Eligibility	SFA_SAP_STDNT_SIM	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Simulate Student Eligibility**	Simulate SAP status processing without saving data.
Review Report Data	SFA_SAP_RPT	**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Review Report Data**	Store batch SAP status details by run control IDs.

Running the SAP Batch Process

Access the Process SAP page (**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Process SAP**).

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

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Before running the SAP process, ensure that the **Set Up Activation** field is set to *Active* on the Setup page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Setup).**

Population Selection

The **Population Selection** check box is selected or cleared, depending on the value in the **Selection Criteria** field in the **Input Parameters** group box on this page. When the check box is selected, population selection options appear in the **Population Selection** group box.

For more information on population selection:

See Campus Community Fundamentals: Using the Population Selection Process.

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Field or Control	Description
Population Selection	This check box is selected by default when you select *Population Selection* in the **Selection Criteria** field in the **Input Parameters** group box on this page. Use the Population Selection option to restrict the selection of IDs to only the IDs identified by a tool configured to select a specific population. Only identified IDs are selected for an SAP evaluation. If they meet the evaluation criteria, an SAP calculation is created. If the preview functionality is enabled for the selection tool, you can preview the population selection results before you run the process.
Selection Tool	This field is available if the **Population Selection** check box is selected. Select from *Equation Engine, PS Query,* or *External File,* or enter a tool that your institution created to select the IDs to review for an SAP calculation. Additional parameters are displayed for your selected tool.
Query Name	Select a query to use for Population Selection. This field is available only when *PS Query* is selected in the **Selection Tool** field. Select a PS Query that uses the SFA_SAP_BIND bind record.

Input Parameters

Field or Control	Description
Aid Year	Select the aid year for which you want to evaluate Satisfactory Academic Progress. This field displays only if you have selected a SAP Process Type of *Aid Year* for the career in context in your SAP setup.
Term	Select the term for which you want to evaluate Satisfactory Academic Progress. This field displays only if you have selected a SAP Process Type of *Term* for the career in context in your SAP setup.

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Field or Control	Description
Selection Criteria	Select one of three options to determine which IDs are selected and evaluated for an SAP Calculation. Select *Population Selection* to use the Population Selection feature to select IDs for an SAP evaluation. When selected, the **Population Selection** check box is selected, the options in the Population Selection group box are displayed, the **Student Override** check box is not available, and the **Student Override** grid is hidden. Select *Student Override* to manually enter in specific IDs for an SAP evaluation in the **Student Override** grid. When selected, the **Student Override** check box is enabled, the **Student Override** grid is displayed, the **Population Selection** check box is disabled, and the Population Selection options are hidden. Select *Standard SAP Selection* to use the built-in SAP selection criteria to select IDs for an SAP evaluation. This option disables the **Student Override** and **Population Selection** check boxes and hides both the **Student Override** grid and the Population Selection options.
Processing Option	Select the processing option: • *Update and Report* inserts the same row into the Student SAP Record and the Review Report Data page. • *Report Only* inserts a row into the Review Report Data page. Use this option to see the results before updating the SAP status on the Packaging Status Summary page. • *Update Only* inserts a row into the Student SAP Record.
Update using most recent evaluation term (Pass 2)	Select this check box to update Pass 2 into the Student SAP record. If this is not selected, Pass 2 results are not updated in the Student SAP record. Pass 2 processing occurs when the student does not have a row for the term or aid year being processed. Statistics from the latest term or aid year are used to calculate the student's SAP Status. Statuses and Actions rules are not evaluated for Pass 2.

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Field or Control	Description
Skip Status and Actions	Select this check box to skip the Statuses and Actions rules set up when processing Pass 1 for multiple aid years or terms. This avoids an incorrect Calc SAP status from being calculated. If this option is selected on the SAP processing run control *and* Statuses and Actions rules are set up and selected, they are skipped. Use this option when you are running multiple aid year or term processes and comparing with the prior status would not be accurate. This option obtains the actual calculated SAP status for the student and does not evaluate the prior statuses and any matching statuses and action rules. As an example, you would not select this option in this case: If processing in January for spring 2006 and for fall 2006, the previous fall 2005 is the maximum term past the fully graded date that both processing terms select. If the process is run for spring 2006 with a status of *Probation,* then runs for fall 2006, it calculates *Probation,* then compares it to the spring value of *Probation,* and gives an overall status of *Disqualified* which would be incorrect.
Don't Run If SAP Status Exists	Select this check box if you do not want to recalculate for students who already have a SAP Status code for either the aid year or term that you are processing.

Update Options

These options appear only when the **Don't Run If SAP Status Exists** check box is not selected.

Field or Control	Description
Calc SAP Status Change Only (calculate SAP status change only)	Select this option to insert a new SAP record if no SAP record exists for the run control values or if the Calc SAP Status code changes.
Any Calculation Value Change	If this option is selected, the process inserts a new row (create a new SAP calculation) if any of the values change from a previous calculated row for the same term/aid year - even if the resulting changes do not change the Calculated Status. It also inserts a new row if no row exists. If this option is not selected, then a new row is only inserted if there is a change to the Calculated Status. It also inserts a new row if none exists, unless there is no data to process for that term or aid year.

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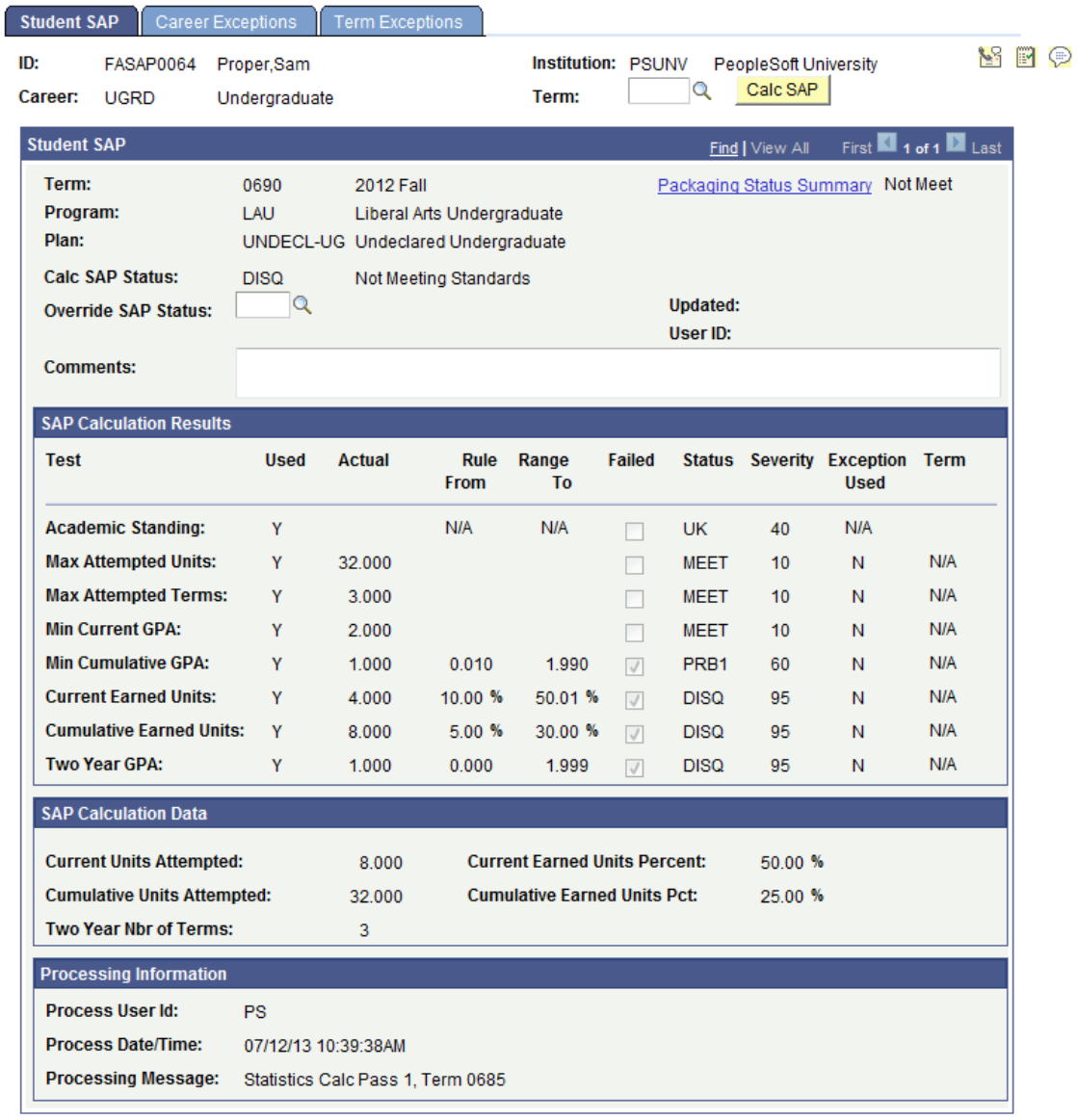
Student Override

Select the **Student Override** option to display the Student Override grid for entry of student IDs. Enter the IDs of the students to be considered for SAP evaluation. If the students meet the evaluation criteria, an SAP calculation is created. Only the IDs you list are processed.

Maintaining Student SAP

Access the Student SAP page (**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Maintain Student SAP Data**, and then **Student SAP**).

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



Student SAP | Career Exceptions | Term Exceptions

ID: FASAP0064 Proper,Sam
Career: UGRD Undergraduate
Institution: PSUNV PeopleSoft University
Term: Calc SAP

Student SAP — Find | View All — First 1 of 1 Last

Term: 0690 2012 Fall — Packaging Status Summary: Not Meet
Program: LAU Liberal Arts Undergraduate
Plan: UNDECL-UG Undeclared Undergraduate
Calc SAP Status: DISQ Not Meeting Standards
Override SAP Status:
Updated:
User ID:
Comments:

SAP Calculation Results

Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	Y		N/A	N/A	☐	UK	40	N/A	
Max Attempted Units:	Y	32.000			☐	MEET	10	N	N/A
Max Attempted Terms:	Y	3.000			☐	MEET	10	N	N/A
Min Current GPA:	Y	2.000			☐	MEET	10	N	N/A
Min Cumulative GPA:	Y	1.000	0.010	1.990	☑	PRB1	60	N	N/A
Current Earned Units:	Y	4.000	10.00 %	50.01 %	☑	DISQ	95	N	N/A
Cumulative Earned Units:	Y	8.000	5.00 %	30.00 %	☑	DISQ	95	N	N/A
Two Year GPA:	Y	1.000	0.000	1.999	☑	DISQ	95	N	N/A

SAP Calculation Data

Current Units Attempted: 8.000
Cumulative Units Attempted: 32.000
Two Year Nbr of Terms: 3
Current Earned Units Percent: 50.00 %
Cumulative Earned Units Pct: 25.00 %

Processing Information

Process User Id: PS
Process Date/Time: 07/12/13 10:39:38AM
Processing Message: Statistics Calc Pass 1, Term 0685

All students with an FA Term built are able to access the SAP Student Data page, which allows for online SAP calculation for an individual student. Students must have an active row in FA

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Term for the term or aid year that is being processed. If an active row does not exist, the process executes but returns a blank page, or, if a previous status exists, the existing page data is displayed.

> **Note**
>
> Before running the online process, ensure that the **Set Up Activation** field is set to *Active* on the Setup page **(Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Satisfactory Academic Progress**, and then **Define Setup Criteria**, and then **Setup).**

This page displays the SAP status code and all the calculation results used to determine a student's SAP status code.

The **Aid Year** or **Term** field is displayed depending on the setup criteria. Enter the aid year or term to process for the SAP online process.

Click the **Calc SAP** button to run the SAP process for an individual. An Active FA Term record must exist for the aid year or term being processed. After processing, the **SAP Calculation Results, SAP Calculation Data,** and **Processing Information** group boxes are populated.

Student SAP

Field or Control	Description
Aid Year or **Term**	The aid year or term used in the SAP online or batch calculation. If the batch process calculated the data, this is the aid year or term used on the run control for that batch run.
Packaging Status Summary	Click this link to view the **Satisfactory Academic Progress** field on the Packaging Status Summary page.
Program	Displays the academic program from FA Term that was used to determine SAP status.
Plan	Displays the academic plan from FA Term that was used to determine SAP status.
Calc SAP Status (calculated SAP status)	Displays the calculated SAP status that controls the value in the **SAP** field on the Packaging Status Summary page. To access this page, click the **Packaging Status Summary** link.
Override SAP Status	You can enter a SAP status to override the calculated SAP status. If populated, this status overrides the value in the **Calc SAP Status** field and controls the **Satisfactory Academic Progress** field on the Packaging Status Summary page. Delete the override status before running the process after the fully graded date.
Updated	Displays the date that an override is placed on the student's SAP record.
User ID	Displays the user ID of the person who applied the override.

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Field or Control	Description
Comment	A comment can be placed in this field to provide additional information on a student's SAP. Use the comment field when you override a student's SAP Status.

SAP Calculation Results

Field or Control	Description
Test	The eight tests used to determine an SAP status. The possible tests are: • Academic Standing • Max Attempted Units • Max Attempted Terms • Min Current GPA • Min Cumulative GPA • Current Earned Units • Cumulative Earned Units • Two Year GPA
Used	Indicates whether this test was used to determined SAP status.
Actual	Displays the calculated value for any test that is used. This is the value that is used in the rule comparison.
Rule Range From	Displays the lower end of the failed range of the test if the student failed the test. Academic standing does not use ranges and no value exists for the Academic Standing Test row.
Rule Range To	Displays the upper end of the failed range of the test if the student failed the test. Academic standing does not use ranges and no value exists for the Academic Standing Test row.
Failed	Displays as checked if the student failed the test.
Status	Displays the calculated status for each test.
Severity	Displays the severity of each SAP test. The status of the test with the highest severity is used to populate the **Calc SAP Status** field.
Exception Used	Indicates whether an exception rule was used to determine SAP status.
Term	Displays the term used to evaluate academic standing from Student Records. Only displays for the Academic Standing test.

SAP Calculation Data

Field or Control	Description
Current Units Attempted	Displays the number of units the student is attempting for the evaluation term or aid year terms. This is used in the Current Earned Units test.

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Field or Control	Description
Cumulative Units Attempted	Displays the cumulative number of units the student attempted, up to and including the units for the term or terms in the aid year being evaluated. This is used in the Cumulative Earned Units test.
Two Year Nbr of Terms (two year number of terms)	Displays the number of attempted terms calculated for use in the Two Year GPA test.
Current Earned Units Percent(	Displays the Current Earned Units Percent field calculated when the “Use Percentage” option is selected for Current Earned Units Test in the SAP Define Set Up Criteria.
Cumulative Earned Units Pct((cumulative earned units percent)	Displays the Cumulative Earned Units Percent field calculated when the “Use Percentage” option is selected for Cumulative Earned Units Test in the SAP Define Set Up Criteria.

Processing Information

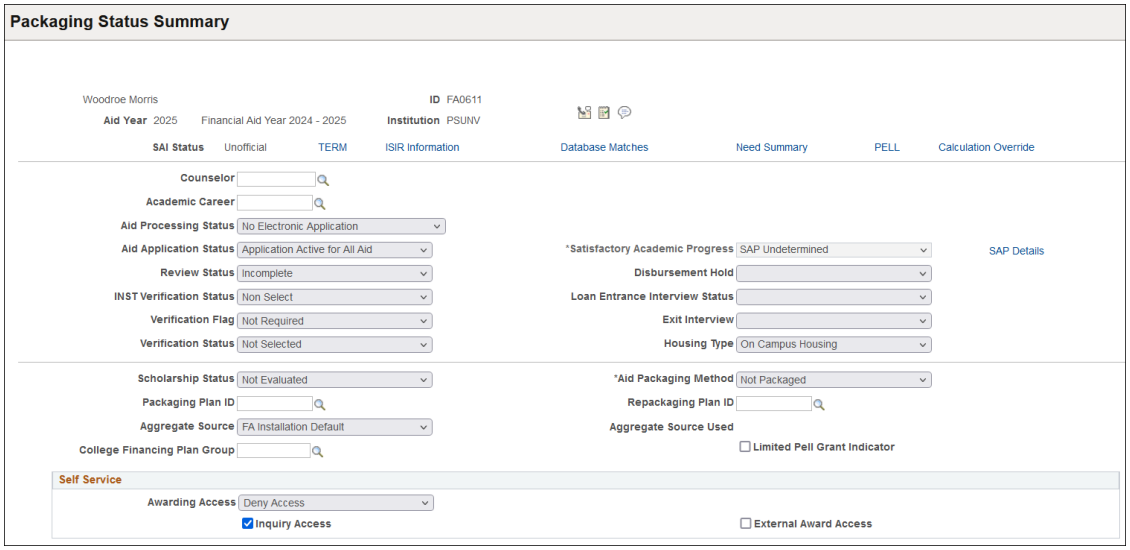
Field or Control	Description
Process User ID	Displays the user ID of the person who ran the batch process.
Process Date/Time	Displays the date and time when the process was run.
Processing Message:	Displays the source of the status code: • Default SAP Status. The status assigned to students who pass all of the selected tests. • Statistics Calc Pass 1, Term XXX. Calculated status from the evaluation term or max term in an aid year. • Statistics Calc Pass 2, Term XXX. Calculated status from the latest (max) term on the student's record.

Viewing the Satisfactory Academic Progress Field

Access the Packaging Status Summary page. (Click the **Packaging Status Summary** link from the Student SAP page.)

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

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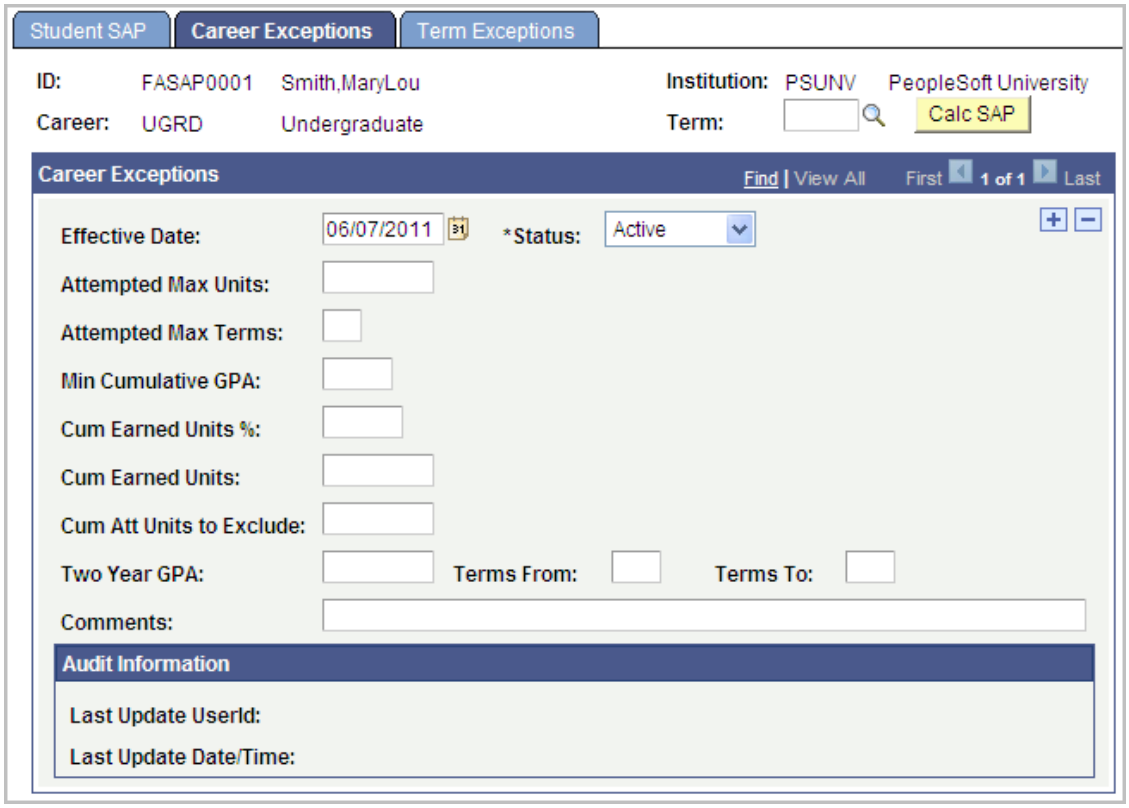
Field or Control	Description
Satisfactory Academic Progress	Enter the SAP status. If the field is not editable, active SAP setup data exists. When active setup data exists, the Process SAP process updates this value based on the SAP status code setup.
SAP Details	Click this link to navigate to the Student SAP page.

Defining Student-Specific Career Exceptions

Access the Career Exceptions page (**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Maintain Student SAP Data**, and then **Career Exceptions**).

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

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This page is for student-specific career rules, rewriting the rule at the student level for the Effective Date and Status control when the student-specific career rule is applied. If any career rules fail when processing, the Exception Failure Default Status is applied and the exception flag is set to Y for the test using the exception.

The SAP status assigned for any career exception failure is the Exception Fail Default Status. It is recommended that this Severity code is the highest of the Not Meet status codes.

Click the **Calc SAP** button to run the SAP process for an individual. An Active FA Term record must exist for the aid year or term being processed.

Career Exceptions

Field or Control	Description
Effective Date	Date this rule is applied.
Status	*Active:* Rule is active and in effect. *Inactive:* Rule is inactive and not in effect.
Attempted Max Units (attempted maximum units)	Enter the total number of attempted units to which the student is limited.
Attempted Max Terms (attempted maximum terms)	Enter the this total number of attempted terms to which the student is limited.
Min Cumulative GPA (minimum cumulative GPA)	Enter the minimum cumulative GPA that the student must have.
Cum Earned Units % (cumulative earned units percentage)	Enter the minimum percentage (attempted units divided by earned units) to which the student is limited.

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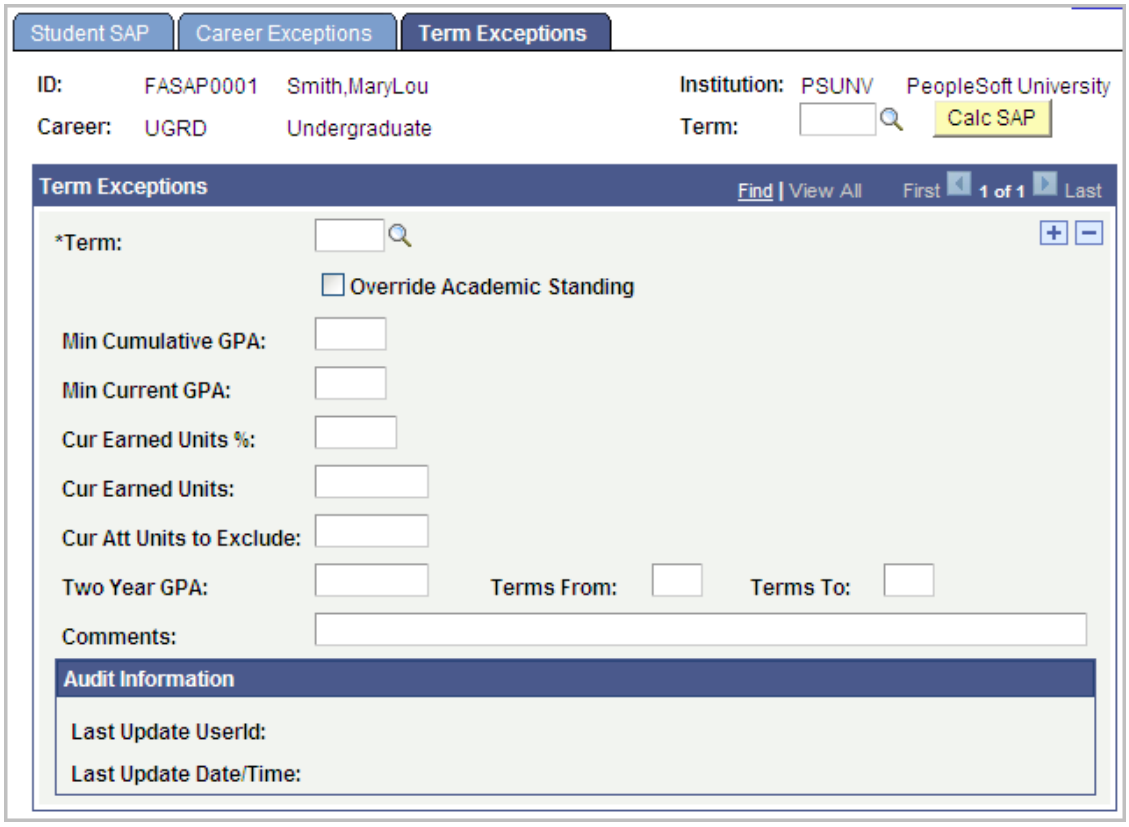
Field or Control	Description
Cum Earned Units (cumulative earned units)	Enter the minimum number of (attempted units divided by earned units) to which the student is limited.
Cum Att Units to Exclude	Enter the total number of cumulative attempted units to exclude from the calculation.
Two Year GPA	Enter the minimum cumulative GPA that the student must have for his or her second year.
Terms From	Enter the starting number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the starting number, it is included in the range.
Terms To	Enter the ending number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the ending number, it is included in the range.
Comments	Enter remarks up to 254 characters, that apply to the student career exception.

Defining Student-Specific Term Exceptions

Access the Term Exceptions page (**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Maintain Student SAP Data**, and then **Term Exceptions**).

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

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This page appears when the process type set up for this student's institution and career is set to term processing. This page is for student-specific term rules. The rules apply only to the specific term entered.

If any of these rules fail, the Exception Failure Default Status is applied. You should make this Severity code the highest of all the Not Meet status codes.

Click the **Calc SAP** button to run the SAP process for an individual. An active FA Term record must exist for term being processed.

Term Exceptions

Field or Control	Description
Term	Enter the term to which these specific student rules apply.
Override Academic Standing	Select this check box to override the academic standing rule for students with Warning or Disqualified status.
Min Cumulative GPA (minimum cumulative GPA)	Enter the minimum cumulative GPA that a student must achieve at the end of the term.
Min Current GPA (minimum current GPA)	Enter the minimum current GPA that the student must achieve for the term.
Cur Earned Units % (current earned units percentage)	Enter the minimum percentage (attempted units divided by earned units) for the term that the student must achieve.

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Field or Control	Description
Cur Earned Units (current earned units)	Enter the minimum number of attempted/ earned units for the term that the student must achieve.
Cur Att Units to Exclude	Enter the total number of current attempted units to exclude from the calculation.
Two Year GPA	Enter the minimum cumulative GPA that the student must have for his or her second year.
Terms From	Enter the starting number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the starting number, it is included in the range.
Terms To	Enter the ending number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the ending number, it is included in the range
Comments	Enter remarks up to 254 characters that apply to the student term exception.

Audit Information

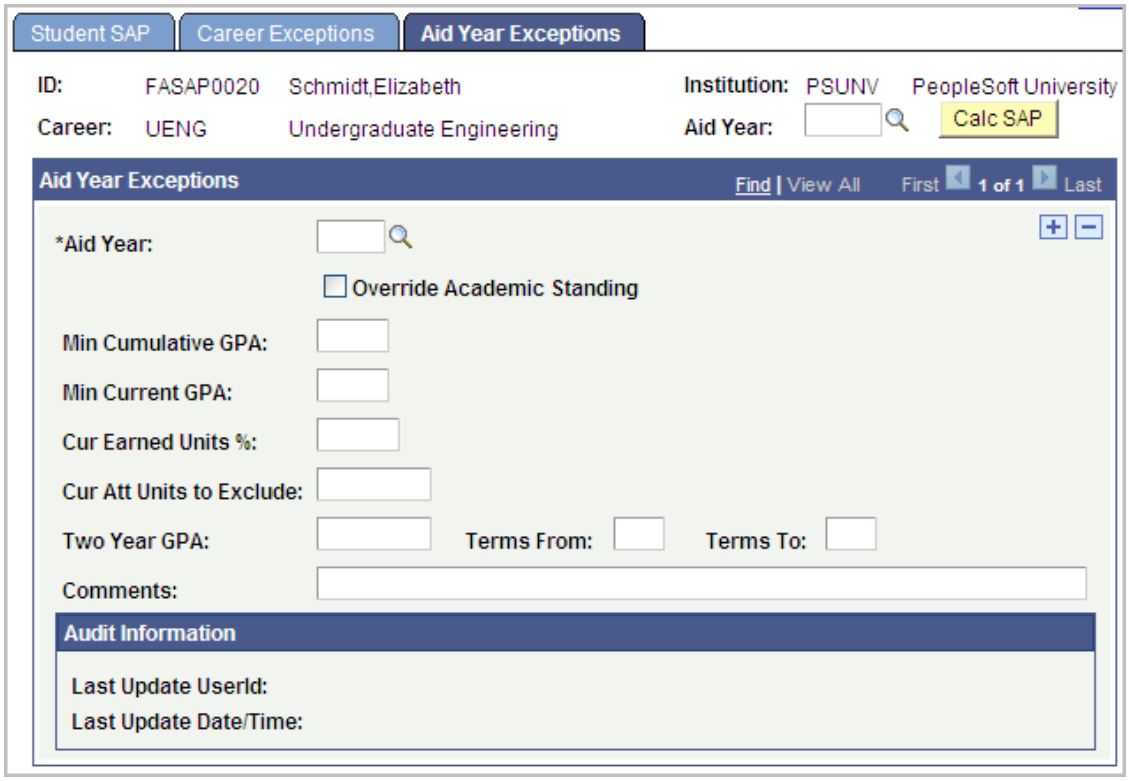
Field or Control	Description
Last Update User ID	Displays the user ID of the person who last saved change to this page.
Last Update Date/Time	Displays the date and time when this page was last saved.

Defining Student-Specific Aid Year Exceptions

Access the Aid Year Exceptions page (**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Maintain Student SAP Data**, and then **Aid Year Exceptions**).

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

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This page appears when the process type set up for this student's institution and career is set to aid year processing. This page is for student-specific aid year rules. The rules apply only to the specific aid year that is entered.

If any of these rules fail, the Exception Failure Default Status is applied. You should make this Severity code the highest of all the Not Meet status codes.

Click the **Calc SAP** button to run the SAP process for an individual. An active FA Term record must exist within the aid year being processed.

> **Note**
>
> For descriptions of the fields on this page, refer to the documentation about the fields on the Term Exceptions page and replace *term* with *aid year.*

Creating SAP Communications

Access the Create SAP Communications page **(Financial Aid**, and then **Satisfactory Academic Progress**, and then **Create SAP Communications).**

The SAP Communications process inserts a row into the Event 3C Trigger table. The unmodified (vanilla) Event Process creates the 3C elements as set up in the Event setup record. You can control the production of duplicate communications by using the unmodified (vanilla) event processing controls.

See Campus Community Fundamentals: Identifying Trigger Conditions.

See Campus Community Fundamentals: Naming an Event.

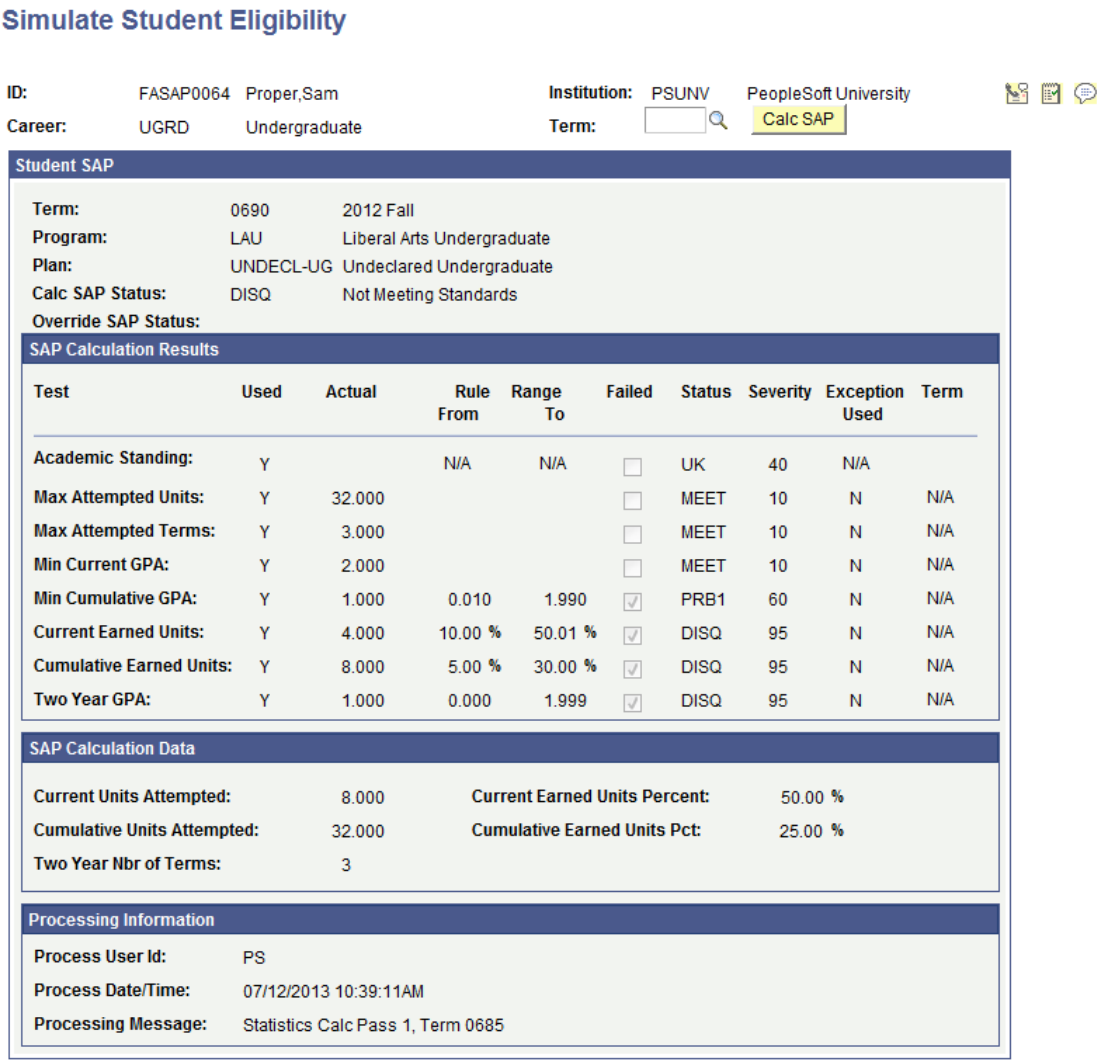
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Field or Control	Description
Term or **Aid Year**	Enter the maximum row in the Student SAP record for either term or aid year.
SAP Status Code	Enter the SAP Status Code for which you want to create SAP communications.

Simulating a Student SAP Calculation

Access the Simulate Student Eligibility page (**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Simulate Student Eligibility**).

This example illustrates the fields and controls on the Simulate Student Eligibility page. You can find definitions for the fields and controls later on this page.



To run the SAP process for a single student without updating the SAP Student Data page, use this page to process SAP status online.

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Depending on your setup criteria, either the **Term** or **Aid Year** field appears. Enter the aid year or term to process for the SAP online process.

Click the **Calc SAP** button to run the SAP simulation process for an individual. An Active FA Term record must exist for the aid year or term being processed. After processing, the **SAP Calculation Results, SAP Calculation Data,** and **Processing Information** group boxes are populated.

Student SAP

Field or Control	Description
Aid Year or **Term**	The aid year or term used in the batch or online SAP calculation. If the batch process calculated the data, this is the aid year or term used on the run control for that batch run.
Program	The academic program from FA Term that was used to determine SAP status.
Plan	The academic plan from FA Term that was used to determine SAP status.
Calc SAP Status (calculated SAP status)	The calculated SAP status that controls the value in the **Satisfactory Academic Progress** field on the Packaging Summary Status page.
Override SAP Status	If populated, this status overrides the value in the **Calc Sap Status** field and controls the **Satisfactory Academic Progress** field on the Packaging Summary Status page. Delete the override status before running the process after the fully graded date.

SAP Calculation Results

Field or Control	Description
Test	Eight tests are used to determine an SAP status. The possible criteria are: • Academic Standing • Max Attempted Units • Max Attempted Terms • Min Current GPA • Min Cumulative GPA • Current Earned Units • Cumulative Earned Units • Two Year GPA
Used	Indicates whether this test was used to determine SAP status.
Actual	The calculated value is populated for any test that is used. This is the value that is used in the rule comparison.
Rule Range From	If the student failed this test, the rule displays in the lower end of the failed range. Academic Standing does not use ranges and no value exists for the Academic Standing Test row.

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Field or Control	Description
Rule Range To	If the student failed this test, the rule displays in the upper end of the failed range. Academic Standing does not use ranges and no value exists for the Academic Standing Test row.
Status	Displays the calculated status for each test.
Severity	Displays the severity of the SAP status. The status with the highest severity is used to populate the **Calc SAP Status** field.
Term	Displays the term used to evaluate Academic Standing from Student Records. This field appears for the Academic Standing test only.

SAP Calculation Data

Field or Control	Description
Current Units Attempted	Displays the number of units that the student is attempting for the evaluation term/aid year terms. This is used in the Current Earned Units test.
Cumulative Units Attempted	Displays the cumulative number of units that the student attempted up to and including the units for the term or terms in the aid year being evaluated. This is used in the Cumulative Earned Units test.
Two Year Nbr of Terms (two year number of terms)	Displays the number of attempted terms calculated for use in the Two Year GPA test.
Current Earned Units Percent(	Displays the Current Earned Units Percent field calculated when the “Use Percentage” option is selected for Current Earned Units Test in the SAP Define Set Up Criteria.
Cumulative Earned Units Pct((cumulative earned units percent)	Displays the Cumulative Earned Units Percent field calculated when the “Use Percentage” option is selected for Cumulative Earned Units Test in the SAP Define Set Up Criteria.

Processing Information

Field or Control	Description
Processing Message	The message identifies the source of the status code: • Default SAP Status. The status assigned to students who pass all of the selected tests. • Statistics Calc Pass 1, Term XXX. Calculated status from the evaluation term or max term in an aid year. • Statistics Calc Pass 2, Term XXX. Calculated status from the latest (max) term on the student's record.

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Reviewing Students from a Batch Run

Access the Review Report Data page (**Financial Aid**, and then **Satisfactory Academic Progress**, and then **Review Report Data**).

After running the SAP process in batch, you can use the Review Report Data page to review the results for all eight tests for all students processed in the batch. This page is available when you select either the *Update and Report* or the *Report Only* option on the Process SAP page.

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27

Preparing for Awarding and Packaging

Making Early Financial Aid Offers

Your institution may use early financial aid offers as part of your admission recruitment process. Early financial aid offers are associated with a career. Because a student can apply for more than one career, this feature enables you to assign an early financial aid offer for each career's admission application the student may submit. Early financial aid offers must have an effective date so that the history of early financial aid offers can be tracked.

The early financial aid offer enables you to award estimated aid to students based on early financial aid categories you define. Select as many of these categories as you want. For each category, you enter an estimated amount of aid, and whether the award category should be offered, accepted, canceled, or declined.

This section lists prerequisites and discusses how to:

- Create early financial aid offers.
- View admissions application information.

Prerequisites

Before you create early financial aid offers using award categories, you must set up early financial aid offer categories.

Related Topics

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

Pages Used to Make Early Financial Aid Offers

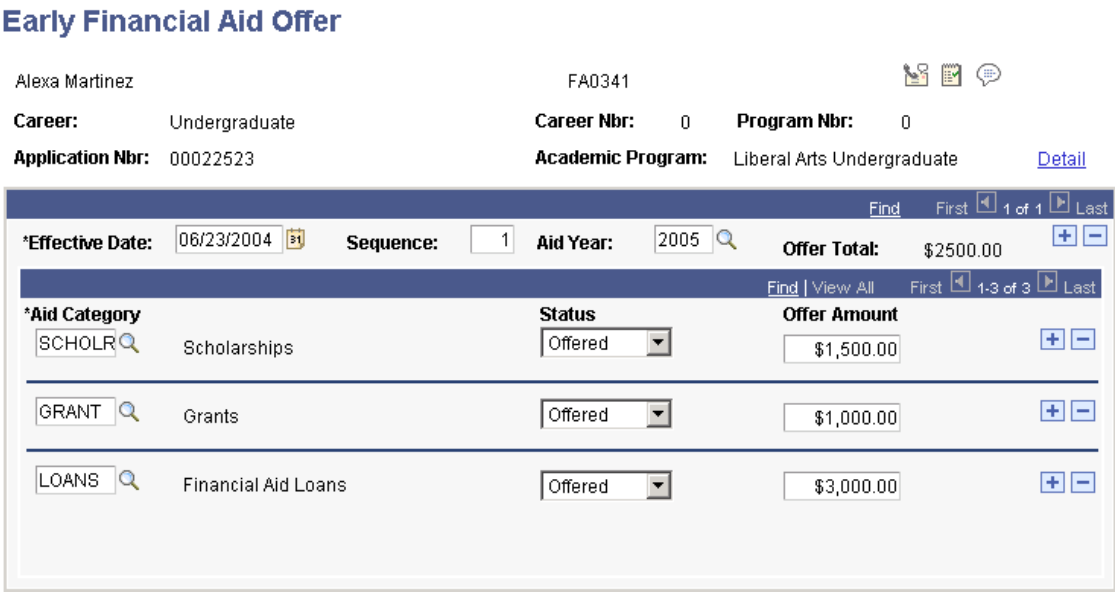
Page Name	Definition Name	Navigation	Usage
Early Financial Aid Offer	ERLY_FA_OFFER	**Financial Aid**, and then **Awards**, and then **Early Financial Aid Awards**, and then **Offer Early Financial Aid**, and then **Early Financial Aid Offer**	Create or modify early financial aid offers.
Admission Application Detail	FA_APPL_SEC	Click the **Detail** link on the Early Financial Aid Offer page.	View admissions application information for the student.

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Creating Early Financial Aid Offers

Access the Early Financial Aid Offer page (**Financial Aid**, and then **Awards**, and then **Early Financial Aid Awards**, and then **Offer Early Financial Aid**, and then **Early Financial Aid Offer**).

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



Warning

It is strongly advised that the financial aid office work closely with the admissions office regarding the use of early financial aid offers. Early financial aid offers do not require a student to be checked for eligibility for financial aid awards. If a student is offered an early financial aid offer but later is found to be ineligible for aid or for the amount of aid offered, your institution could be held liable for the student's funding.

A student can have multiple admissions applications for multiple programs that may be in multiple careers. The **Career Nbr** (career number), **Program Nbr** (program number), and **Application Nbr** (application number) fields display sequential numbers for multiple admissions applications.

Field or Control	Description
Detail	Click to access the Admission Application Detail page and review the status of the student's admissions application.

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Field or Control	Description
Sequence	Enables you to have up to ten early award offers for each day, working in conjunction with the effective date. The system increases the sequence automatically, or you can enter a particular sequence number.
Aid Year	Populates automatically based on the aid year selected in the user default settings. To change the aid year, use correction mode.
Offer Total	The total amount of early financial aid that you have awarded to the student.
Aid Category	Select the appropriate aid category for the type of aid that you are offering the student. The categories you set up on the Early Aid Categories page are available in this field. See Preparing for Early Financial Aid Offers.
Status	The current action being taken on the aid category. *Accepted:* The student has accepted the offered aid category. *Canceled:* You have canceled the offered aid category. *Declined:* The student has declined the offered aid category. *Offered:* The aid category has been offered to the student, but no response has been received from the student yet.
Offer Amount	The amount for the aid category that you want to offer the student.

Viewing Admission Application Information

Access the Admission Application Detail page (click the **Detail** link on the Early Financial Aid Offer page).

Field or Control	Description
Complete and **Completed Date**	Indicates whether the student's admissions application is complete and the date that the application was completed.
Evaluation Status and **Evaluation Date**	The evaluation status of the student's admissions application and the date associated with this status. *Complete:* The evaluation is complete. *In Progress:* The evaluation is in progress.

Application Detail

The **Application Detail** group box displays academic program data from the student's admissions application.

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Field or Control	Description
Effective Sequence	Distinguishes individual rows entered with the same effective date. This feature enables you to have admissions applications for each academic program for which the student applies. The system increases the sequence automatically, or you can enter a particular sequence number.
Status	The admissions status for the student in the specified academic program.
Program Action	Indicates the current action being taken in the admissions process.
Admit Term	The term in which the student was admitted to the academic program.
Action Reason and **Action Date**	The reason that and date on which the action was taken.

Selecting Your Application Data Source for Awarding

Specify whether you want to use federal application data (ISIR), institutional application data (PROFILE or an institutional application), or either (indicating which you would prefer to use if both are available). The application data source you select affects the packaging outcomes of Mass Packaging, Auto Packaging, and online manual awarding.

To allow the awarding and packaging of financial aid by using federal application data or institutional application data, you must enter a value in the **Packaging Data Source** field on the Financial Aid Defaults page, or override the installation level default for this field using an aid processing rule set at the academic career or academic program level. Select whether you want to use federal data, institutional data, or use a preference for federal or institutional data. For example, you could select the *Institutional then Federal* value for the packaging data source. If institutional application data is not available, the Packaging routine uses the student's federal application data to award monies.

The Packaging routine and the Equation Engine are affected by your selection of application data, either federal or institutional. The Packaging routine includes manual awarding, Auto Packaging, Mass Packaging, and the Mass Actions page. If you select an application type in the **Packaging Data Source** field that is different from the type of application that exists for a student, you cannot make awards for that student or adjust that student's awards. For example, if you select institutional application data as your packaging data source and the student has only federal application data, you cannot make awards for that student or adjust that student's existing awards.

> **Note**
>
> If the student does not have the specified packaging data source, the student does not receive any awards—except for *no effect* and conditional awards. For example, if you select *Federal Only* in the **Packaging Data Source** field and you only have institutional application data loaded for students, none of the students are awarded.

Depending on the packaging data source selected and the type of application available for a student, the and Equation Engine routines select data from either the federal application data

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(ISIR_** tables) or the institutional application data (INST_** tables). The data selected is then used to populate fields used by the Packaging and Equation Engine routines. Several fields selected from the ISIR_** tables do not have corresponding fields in the INST_** tables. Because of this, some packaging fields are populated with assumed values when you are packaging using institutional data. For example, database match information is not provided in the PROFILE application, so the student is assumed to have valid values for the database matches.

When the routine packages students using institutional data (Inst or Inst, Fed), it first determines whether an ISIR also exists for the student, in addition to the PROFILE or other institutional application in the system. Previously, if an ISIR existed for a student, the routine used ISIR data to determine federal eligibility and used institutional data for all other selection or eligibility criteria, such as packaging equations. Data for equations was selected when packaging data was selected. Now you must write your own equation to determine what data is selected. If only an institutional application and no ISIR exists for the student, the Packaging routine uses institutional data to determine eligibility—federal, institutional, or other—to package the student.

The following table provides a list of the packaging fields for which a corresponding field does not exist in the institutional application data (PROFILE or an institutional application). The second column tells you how the packaging field is populated when institutional application data is selected for use in packaging.

ISIR Fields Used in Packaging Routine with no Corresponding INST (PROFILE) field	How Packaging Fields are Populated when Institutional Data Source is used
1ST_BACH_DEGREE	*2-No* is loaded (as an assumption).
DRUG_OFFENSE_CONV	*1-Eligible* is loaded (as an assumption).
FED_DEPEND_STAT	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
FED_EFC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
FED_NEED	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
INS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
NSLDS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
PRISONER_MATCH	*0-Not Prisnr* is loaded (as an assumption).
PRORATED _EFC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
GRADUATE_STUDENT	*2-No* is loaded (as an assumption).
SS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
SS_REGISTRATION	Eligible — this information comes from the Student Aid Attributes table.

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ISIR Fields Used in Packaging Routine with no Corresponding INST (PROFILE) field	How Packaging Fields are Populated when Institutional Data Source is used
SSA_CITIZENSHIP_IND	Eligible — this information comes from the Student Aid Attributes table.
SSN_MATCH	Eligible — this information comes from the Student Aid Attributes table.
TITLEIV_ELIG	*Y-Yes* is loaded (as an assumption).
WEEKLY_PC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
WEEKLY_SC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.

Note

The fields FED_DEPEND_STAT and INST_DEPEND_STAT are populated from federal and/or institutional data load processes and are on the STUDENT_AID table. The Packaging routine references these values to determine dependency status.

Related Topics

- Defining Awarding and Rounding Rules
  Access the FA Item Type 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**).

Entering Veteran Education Benefits

Important

Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

The Packaging routine is able to include and exclude Montgomery GI Bill (Chapter 30)/ AmeriCorps (Title 1) veteran education benefits based on the following criteria when awarding federal financial aid. This veteran education benefits amount must be used as follows:

- Considered as a resource, which reduces need, when awarding campus-based programs —SEOG, Federal Work Study, and Perkins.
- Excluded when determining a student's eligibility (does not reduce need) for a subsidized loan—FFELP or Direct.
- Considered as estimated financial aid for an unsubsidized loan—FFELP or Direct.

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The Packaging routine then uses this amount when determining need and estimated financial aid for awarding. The Need Summary pages also display the veteran education benefits amount.

This section discusses how to:

- Enter other educational resource information.
- Process other educational resources.

Page Used to Enter Veteran Education Benefits

Page Name	Definition Name	Navigation	Usage
Veteran's Education Benefits	STDNT_AWD_PER_RSRC	**Financial Aid Awards**, and then **Award Processing**, and then **Identify Education Resources**, and then **Veteran's Education Benefits**	Enter the amount a student receives from the Montgomery GI Bill/AmeriCorps programs for all appropriate award periods.

Entering Other Educational Resource Information

Access the Veteran's Education Benefits page (**Financial Aid Awards**, and then **Award Processing**, and then **Identify Education Resources**, and then **Veteran's Education Benefits**).

Field or Control	Description
EFC/SAI Status (expected family contribution status)	Displays the student's ISIR EFC/SAI status. Values are *Official*, *Provisional*, *Rejected* and *Unofficial*.
ISIR Information	Click this link to access the ISIR Information page and view selected information from the student's ISIR.
Database Matches	Click this link to access the Database Matches page and review the student's status regarding the U.S.E.D. required database matches.
Award Period	Indicates the award period associated with the veteran education benefit amount you are entering.
Montgomery GI Bill/AmeriCorps	Enter the amount the student is being awarded for veteran education benefits. The Packaging process uses the veteran education benefits amount you enter. This amount reduces need for campus-based awarding, is excluded from consideration when awarding subsidized loans (FFELP or Direct), and is included as estimated financial aid when awarding unsubsidized loans—FFELP or Direct. The amounts that you enter are specific to each award period.

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Field or Control	Description
Print as Other Resource	Select this check box if you want the amount that you enter to print on the Financial Aid Notification (FAN) letter as *Other Resource.* If you do not select this check box, the veteran education benefits amount does not appear on the FAN letter.

Processing Other Educational Resources

The Packaging process uses the veteran education benefits amount in the following way:

- It reduces need for campus-based awarding.
- It is *not* included in the need calculation for the awarding of subsidized loans—FFELP or Direct.
- It is included as estimated financial aid for unsubsidized loans—FFELP or Direct.

These rules are used during Manual Packaging, Auto Packaging, and Mass Packaging.

> **Note**
>
> Packaging treats the veteran education benefits amount exactly the same for federal methodology (FM) and institutional methodology (IM) processing. Only one entry exists on the Student Aid Attribute record for the veteran education benefits amount. The Need Summary pages display the same amount in both the FM and IM columns.

You enter veteran education benefits amounts for both academic and non standard award periods. Be sure to divide the veteran education benefits amount correctly between award periods. During packaging, if the **Award Period** value on the packaging plan is *Both,* then the Packaging process adds the two award period values and uses that amount when assessing need.

If you modify the award period on the student's Term Budget record—for example, from academic to non-standard—and that student has veteran education benefits, you receive this award message: *This student has 'Other Resources' associated with this Award Period. Please check the distributions as this change may affect the student's resources/need calculation.* You must change the amount entered for the veteran education benefits to derive the appropriate amount for each award period.

> **Note**
>
> When the system is determining a student's eligibility for a particular award, eligibility is based on the student's period of enrollment rather than the student's loan period. If you want to calculate a one-term only loan, you must adjust/prorate the student's veteran education benefits amount accordingly.

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Reviewing the Student's Packaging Status

> **Important**
>
> Mass Change is a deprecated product. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

The Packaging Status Summary page provides a summary of the wide variety of information the Packaging routine uses. It includes federal and institutional verification status, disbursement hold, satisfactory academic progress, and packaging information. Other processes or actions affect many of the fields on this page. You can change these fields either manually or using Mass Change.

This section discusses how to:

- Review the Packaging Status Summary page.
- View database matches.
- Review the U.S.E.D. database match process.
- Review Pell information.
- Override Pell eligibility calculation setup values.

Pages Used to Review the Student's Packaging Status

Page Name	Definition Name	Navigation	Usage
Packaging Status Summary	STDNT_AID_PACKAGE	**Financial Aid**, and then **View Packaging Status Summary**, and then **Packaging Status Summary**	Review a comprehensive summary of a student's financial aid application and award information.
Financial Aid Term (inquiry)	STDNT_FA_TERM_SEC	Click the **TERM** link on the Packaging Status Summary page or the FA Term link on the Student Budget Maintenance page.	View the student's Financial Aid Term information.
Statistics (inquiry)	STDNT_FA_TERM_SEC1	Click the **Statistics** link on the Financial Aid Term page.	View the student's GPA related information (including term and cumulative GPA), units taken and passed, and terms in residence.
Form of Study	STDNT_FA_TERM_SEC2	Click the **Form of Study** link on the Financial Aid Term page.	View information relating to a student's exchange program.

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Page Name	Definition Name	Navigation	Usage
ISIR Information	ISIR_INFO_SMR2_SEC	Click the **ISIR Information** link on the Packaging Status Summary page or the ISIR link on the Veteran's Education Benefits page.	View select information from the student's most recently loaded ISIR and information from Campus Community.
ISIR Comments	ISIR_SMR2_CMNT_SEC	Click the comment code on the ISIR Information page.	View the text of the ISIR comment and the severity of the comment code.
Database Matches	ISIR_DBMATCH_SEC	Click the **Database Matches** link on the Packaging Status Summary page or the Veteran's Education Benefits page.	View database matches. Review or manually override a student's status for the U.S.E.D. federally required database matches (populated by the ISIR data load process).
Need Summary	NEED_SMRY_PKG_SEC	Click the **Need Summary** link on the Packaging Status Summary page.	View the student's cost of attendance and need, calculated with both federal and institutional methodologies.
PELL Information	PELL_INFO_SEC	Click the **PELL** link on the Packaging Status Summary page.	Review Pell information or initiate Pell Payment processing for a student if they have received a Pell Grant. Update the **Pell Processing Status** field.
Student Override	STDNT_PELL_PKG_SEC	Click the **PELL Calculation Override** link on the Packaging Status Summary page.	Override your institutional Pell eligibility calculation setup for a student.
Restricted Aid Information	STDNT_RSTRCAID_SEC	Click the **Restricted Aid** link on the Packaging Status Summary page.	View the status and amount of the student's restricted aid award.
Financial Aid Award	STDNT_AWRD_CTG_SEC	Click the **Financial Aid Awarded** link on the Packaging Status Summary page.	View the student's financial aid awards. Determine whether the student's awards have been disbursed to the student.

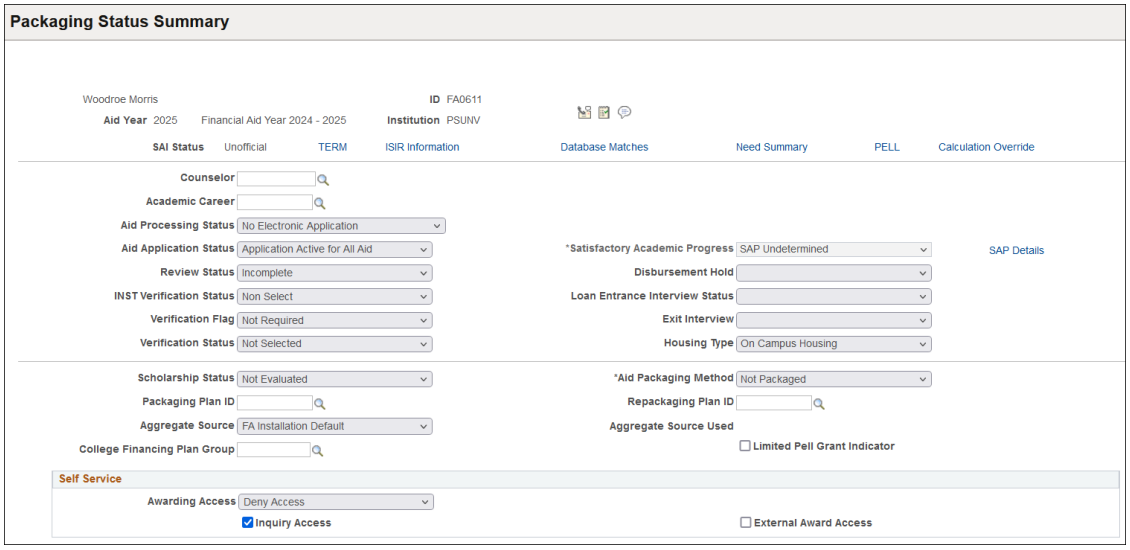
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Page Name	Definition Name	Navigation	Usage
Student SAP	SFA_SAP_STDNT	Click the **SAP Details** link on the Packaging Status Summary page.	View the student's Satisfactory Academic Progress details, such as attempted and earned units or current and cumulative GPA.
Student Attributes	STDNT_AID_PKAGE_CA	Financial Aid, View Packaging Status Summary, Student Attributes.	Enter values for fields created using the Common Attribute Framework.

Reviewing the Packaging Status Summary Page

Access the Packaging Status Summary page (**Financial Aid**, and then **View Packaging Status Summary**, and then **Packaging Status Summary**).

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



Field or Control	Description
EFC/SAI Status (expected family contribution status)	Displayed from the financial aid application data. The student's EFC/SAI can be *Official*, *Provisional*, *Rejected*, or *Unofficial*.
TERM	Click this link to access the Financial Aid Term page and view Financial Aid Term information.
ISIR Information	Click this link to access the ISIR Information page and view some of the student's ISIR information.
Database Matches	Click this link to access the Database Matches page and review a student's status regarding the U.S.E.D. required database matches.

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Field or Control	Description
Need Summary	Click this link to access the Need Summary page and view the student's need summary information calculated with both federal and institutional methodologies.
PELL	Click to access the PELL Information page and view Pell information or to initiate Pell Payment processing for a student if they have received a Pell Grant.
PELL Calculation Override	Click this link to access the Pell Eligibility Calculation - Student Override page and override your institution's Pell eligibility calculation values for this student.
Counselor Name	Enter a financial aid counselor's ID in this field if a particular counselor is assigned to the student.
Restricted Aid	This link appears only if the student has restricted aid information entered on the Restricted Aid page. Click to access the Restricted Aid Information page and view the status and amount of the student's restricted aid award.
Financial Aid Awarded	This link appears when the student has one or more financial aid awards. Click to access the Financial Aid Awards page and view the student's financial aid awards.
Academic Career	This value is entered with the first ISIR load and is not changed by subsequent ISIR loads. If the student has multiple careers, the settings that you establish on the Prospect Source Cross Reference Setup page determine the career entered in this field. Update this field by selecting the correct career for the student. The value in this field is automatically updated after the student has been packaged.

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Field or Control	Description
Aid Processing Status	Indicates where the student is in the Awarding process. You can also update this status using the **Package Status** field on the award entry pages. Use this field in Mass Packaging to determine whether students are ready to be packaged. The Disbursement Authorization routine also uses this field to determine whether a student's package is complete, if you select the **Package Complete** check box on the Disbursement Rules: Global - Indicators page or the Disbursement Rules: Item Type - Indicators page. *Applied:* The student has applied for financial aid. This value is automatically populated when you load a financial aid application like an ISIR, a PROFILE application, or an institutional application. *No Electronic Application:* No electronic application has been received. *Packaging Completed:* The student's award package has been posted. The Posting routine automatically updates the field to this value. To repackage a student after their status has been changed to *Packaging Completed,* use Manual or Auto Packaging or set up a Mass Packaging query definition to select students with a status of *Packaging Completed.* *Ready for Counselor Review:* The student should be or is currently being reviewed by a financial aid counselor. *Ready for Packaging:* The student is ready for packaging. When you select students for Mass Packaging, you may want to choose only students whose status is set to this value; otherwise, any student who meets the Mass Packaging query definition is selected regardless of aid processing status. *Repackage:* The student is ready for repackaging. Can be set by the External Award Load process.

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Field or Control	Description
Aid Application Status	Indicates whether the student's financial aid application is available for financial aid processing. *(none):* You have not assigned the student's financial aid application a status. You cannot access certain pages until you enter a status. *Active:* The student's financial aid application is active for financial aid processing. The system assigns this value automatically when you load the student's first ISIR into the system. *Canceled:* You have canceled the student's financial aid application. You must enter this value manually. *Restricted:* The student has applied for restricted aid only. You must enter this value manually.

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Field or Control	Description
Satisfactory Academic Progress	Indicates whether the student is meeting satisfactory academic progress (SAP). The Packaging routine uses this field to determine whether to award federal aid to the student. The Satisfactory Academic Progress global disbursement rules use this field to determine whether to authorize disbursement of the student's award. Also, CommonLine Disbursement Hold and Release processing can use this field to determine whether the student's loan disbursement should be held or released. *Academic Plan:*The student does not meet satisfactory academic progress and has been placed on an academic plan that leads to meeting SAP. This value allows federal awards to be made and the student's award to be authorized for disbursement. *Meets SAP:* The student is meeting satisfactory academic progress. This value allows federal awards to be made and the student's award to be authorized for disbursement. *Not Meet:* The student is not meeting satisfactory academic progress. Federal awards are not made, and if already awarded the student's award is not authorized for disbursement. *Probation:* The student does not meet satisfactory academic progress and has been placed on Probation. This value allows federal awards to be made and the student's award to be authorized for disbursement. *Undetrmine:* (undetermined) Satisfactory academic progress is undetermined or has not been calculated. Federal awards are not made, and if already awarded, the student's award is not authorized for disbursement. *Warning:* This value should only be used by institutions that process satisfactory academic progress by term. A student that does not meet satisfactory academic progress for the first time is assigned a warning status. This value allows federal awards to be made and the student's award to be authorized for disbursement.
SAP Details	Click on this link to view the Student SAP page.
Review Status	Indicate the status of the review if your institution conducts a review of the student's financial aid application. *(none):* Indicates that your institution does not conduct a review. *Complete:* The review of this application has been completed. *Incomplete:* This application is awaiting a review.

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Field or Control	Description
Disbursement Hold	Enables you to place a hold on the student's awards that is specific to disbursement processing. You can opt to hold authorization/ disbursement of financial aid if a hold is present. *(none):* No holds are placed on this student's financial aid. *Fed Aid* (federal aid): Places a hold on the authorization/disbursement of federal aid only. *Institut.* (institutional): Places a hold on the authorization/disbursement of institutional aid only. *Loan Hold:* Places a hold on the authorization/ disbursement of loans.
INST Verification Status (institutional verification status)	Indicates the status of your verification process if your institution conducts a verification of the student's financial aid application. You must set these values manually if you want to use them in the verification process. *(none):* Indicates that your institution does not conduct an institutional verification. *Doc Select:* The student has been selected for institution verification of a document only. *Non Select:* The student has not been selected for institutional verification. *Select:* The student has been selected for institutional verification.

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Field or Control	Description
Loan Entrance Interview Status	**Note:** The **Loan Entrance Interview Status** field displays when the Financial Aid Installation default for **Loan Counseling Version** is *Simple*. Indicates whether the student has completed a loan entrance interview for the corresponding aid year. If you select the **Loan Entrance Intervw Req** (loan entrance interview required) check box on the Disbursement Rules: Item Type - Indicators page, the interview status value affects how the authorization process treats the student's award. *(blank):* The authorization process automatically determines whether the student has satisfied the loan entrance counseling requirement using the process activated when you select the **Loan Entrance Intervw Req** check box. *Complete:* The student has completed a loan entrance interview. If the **Loan Entrance Intervw Req** check box is selected, the authorization process passes the student and allows the award to be authorized. Set this value after confirmation of the student's completion of loan entrance counseling. *Inst Req* (institution required): Your institution requires the student to have a loan entrance interview, regardless of whether the authorization process requires an interview for loan awards. If the **Loan Entrance Intervw Req** check box is selected, the authorization process fails until you reset the status to *Complete* or *Pending*. Students with prior loan history also fail authorization until you reset the status to blank, *Complete*, or *Pending*. *Pending:* The student's loan entrance interview is pending. If the **Loan Entrance Intervw Req** check box is selected, the authorization process passes the student and allows the award to be authorized. See Understanding Loan Counseling. See Managing Loan Counseling Data.

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Field or Control	Description
Exit Interview	**Note:** The **Exit Interview** field displays when the Financial Aid Installation default for **Loan Counseling Version** is *Simple*. Indicates whether the student has completed a loan exit interview for the corresponding aid year. This field is for informational use only because no delivered process currently uses the value of this field. *Complete:* The student has completed a loan exit interview. *Inst Req* (institution required): Your institution requires the student to have a loan exit interview. *Pending:* The student's loan exit interview is pending.
Housing Status	Indicates the Housing Status that the student reports to the school. This field can be manually updated or updated using Population Update: STDNT_TERM_BDGT.HOUSING_TYPE field in the STDNT_AID_ATRBT record/table.
Loan Counseling Status	**Note:** The **Loan Counseling Version** hyperlink displays when the Financial Aid Installation default for the**Loan Counseling Version**is *Expanded*. This is a link to the Entrance/Exit Loan Counseling page.
Verification Flag	Indicates the status of the Department of Education's verification requirement for this student. You can choose to hold Authorization/ Disbursement of financial aid if the status is not *Complete* by selecting the **Verification Complete** check box on the Disbursement Rules Global page. *(none):* This value is treated the same as the *Not Reqd* value. *Complete:* Indicates that you have completed verification either manually or by the Auto Verification process. *Not Reqd* (not required): The student has not been selected for verification by the Department of Education. This is the default value for this field. *Pending:* The student has failed Auto Verification. This value is automatically populated by the Auto Verification process. *Required:* The student has been selected for verification. This value is automatically populated when you load the student's ISIR data.

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Field or Control	Description
Verification Status	This is associated with the awarding of federal funds, including Pell Grants, Stafford loans, and Direct Loans. It indicates the code you use when reporting a Pell payment made to a student. *Accurate:* Indicates that the ISIR transaction number is 01, meaning the ISIR information is accurate and no changes are needed. Auto verification enters this value, but you can enter it manually. *Calculated:* Indicates that you have calculated the Pell eligibility based on ISIR corrections, and the Pell eligibility has not changed. *Not Select:* The student was not selected for verification. *Not Verfd* (not verified): Indicates that a student was selected for verification but was not verified. *Reprocess:* Indicates the SAR needs to be sent for corrections, and is used for all ISIR transaction numbers that are not 01. *Tolerance:* Indicates that a student's verification passed within the tolerance level. *Wtht Doc* (without documentation): Indicates that the first Pell payment was made to the student before verification was completed. You can only use this value for one Pell payment. Subsequent payments/disbursements require reporting a different verification status.
Scholarship Status	Identifies whether you have evaluated a student for scholarship funds. This is an information only field. It does not affect the Packaging process. *Evaluated:* You have evaluated the student for scholarship funds. *Not Eval* (not evaluated): You have not evaluated the student for scholarship funds.
Award Notification	Click this link to access the FE Award Notification Detail page.
Aid Packaging Method	The method used to create the student's financial aid package. The values in this field are automatically updated. *Auto:* Packaged using Mass Packaging. View the packaging plan used to package the student in the **Packaging Plan ID** field. *Counselor:* A financial aid counselor packages the student manually or using Auto Packaging. If Auto Packaging is used, view the packaging plan used to package the student in the **Packaging Plan ID** field. *Not Pkgd* (not packaged): Not yet packaged. This is the default value until you manually change it.

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Field or Control	Description
Packaging Plan ID	If you use Auto Packaging or Mass Packaging to package the student, this field identifies the packaging plan used to package the student. The Mass Packaging process populates this field when it is run in live mode. When Auto Packaging is used, the Posting routine populates the packaging plan ID.
Repackaging Plan ID	If you use Auto Repackaging or Repackaging, this field identifies the repackaging plan used. The Repackaging process populates this field when it is run in live mode. When Auto Repackaging is used, the Posting routine populates the repackaging plan ID.
Aggregate Source	Identifies and defines the aggregate source that the Awarding and Packaging process uses directly. Prior to any awarding or packaging, this identifies the default value for manual, auto, or mass packaging. You can also change the aggregate source on any of the awarding pages. If online awarding or packaging is already complete, the value here represents the aggregate source used during the Packaging routine. *Default:* Identifies aggregate source to be used based on value defined on FA Installation Defaults. *NSLDS:* Indicates that awarding and packaging uses the NSLDS aggregate totals. *PS:* Indicates that awarding and packaging uses system generated and maintained aggregate totals.
Aggregate Used	Indicates the aggregate source used during packaging. *NSLDS:* Indicates NSLDS aggregate totals used. *PS:* Indicates system generated and maintained aggregate totals used. **Note:** Pell Grant eligibility always uses NSLDS aggregate values.
College Financing Plan Group	Select the appropriate group code for this student.

Self Service

Field or Control	Description
Award Access	Displays the result of how you set up the Self-Service Access page. Values are *Allowed* or *Denied.*
Inquiry Access	Select this check box to allow a student to view assigned financial aid awards.
External Award Access	Select this check box to allow a student to report awards from other sources.

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Limited Pell Grant Indicator

Field or Control	Description
Limited Pell Grant Indicator	Select this check box to indicate: • the student's *first* enrollment is on or after July 1, 2015, *and* • the student is eligible under one of the Ability to Benefit alternatives for enrollment in an eligible Career Pathway program If this check box is selected and the student is otherwise Pell-eligible, the student is awarded using the Career Pathway Alternate Pell Grant Disbursement Schedule. If this check box is not selected, and the student is otherwise Pell-eligible, the student is awarded using the Regular Pell Grant Disbursement Schedule. **Note:** This indicator can be set for multiple students using Population Update. Add SFA_LPG_IND (Limited Pell Grant Indicator) to the STDNT_AID_ATRBT (Packaging Status Summary) record by inserting a new row. See Campus Solutions Application Fundamentals: Securing and Setting Up the Population Update Process.

Related Topics

- Defining Basic Global Rules for Authorization
  Access the Disbursement Rules: Global - Indicators page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Global Rules**, and then **Indicators**).
- Managing Disbursement Hold and Release Processing
  The system automatically selects and reviews pending CommonLine loan disbursements. If your institution participates in disbursement hold and release processing, you can use the Hold/Release process (FAPLCLHR) to determine whether disbursements should be released to your institution or held until your institution requests the funds.
- Working with Auto Verification
  This section discusses how to:
- Awarding Restricted Aid
  This section provides an overview of restricted aid and discusses how to:
- Campus Self Service: Setting Up Self-Service Inquiry Options
- Campus Self Service: Setting Up Self-Service Awarding Options
- Setting Up and Accessing a College Financing Plan

Viewing Database Matches

Access the Database Matches page (click the **Database Matches** link on the Packaging Status Summary page or the Veteran's Education Benefits page).

The database match values on this page are display only. The Validation routine uses these values to determine whether the student is eligible for federal financial aid using previously

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defined eligibility rules. If you want to change the federally reported database match value to allow a student to receive federal aid, you must submit a history correction. When that history correction has been resolved and a Correction ISIR has been received by your institution, the database match field in question contains the resolved value. As a result, you can process the student for federal aid. If you want to award the student federal aid prior to receiving the revised Correction ISIR, you must select the **Override** check box.

The system enforces additional federal database edits for the following existing database matches:

- Student's Social Security Number match with SSA: student's date of birth inconsistent with SSA records.
- Veteran Status match with Veteran Affairs: independent due to VA status.

During packaging, the system performs the database match edits in the following sequence:

1. SSN Match
2. SSA Citizenship
3. DHS (formerly INS) Match
4. VA Match
5. Selective Service Match
6. Selective Service Registration
7. NSLDS Match
8. Drug Offense Conviction
9. Parent SSN Match

The system checks the first database match in the sequence (SSN Match) and determines whether or not resolution is required. When it encounters a database match that needs resolution, it does not perform any additional database match checks until the match in question is resolved. After you resolve the database match issue, the system then checks the next database match in the sequence. For example, if a student has three database match problems, the system does not perform all three checks at the same time. It starts serially with the first one. If the match is good, it moves to the next match. If the next one is not good, the system does not perform any more database checks until that database match is resolved.

Important

When you override a federally reported database match value, your institution assumes full responsibility for changing these values.

Field or Control	Description
Override	Select the check box next to a database match value to override the federally reported match value. This indicates that you have made a professional judgement decision and want the system to award and disburse federal financial aid for this student. If you want override a federally reported database match value for a group of students, you can use Mass Change to select the **Override** check box.

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Field or Control	Description
SSN Match (social security number match)	If you try to award federal monies to the student for the field values that do not allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: SSN match code indicates student is not federally eligible.* *Date of Dt* (date of death): According to the Social Security Administration (SSA), the SSN the student provided belongs to a deceased person. The Validation routine does *not* allow you to award federal financial aid to this student. *Late:* See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags. *Match:* The SSA found a match for the student's SSN. The Validation routine allows you to award federal financial aid to this student. *Mismatch:* The student's date of birth or name did not match the SSA's records for the SSN. The Validation routine does *not* allow you to award federal financial aid to this student. *No DOB:* No match was conducted because the student did not provide date of birth information. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must provide date of birth information on the SAR. *No Match:* The SSA did not find a match for the student's SSN. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must correct the SSN on the SAR, submit a new FAFSA with the correct SSN, or contact the SSA. *No Name:* No match was conducted because the student did not provide his or her first or last name, or both. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must provide both first and last name on the SAR. *Not Sent:* No match was conducted because the SSN provided by the student did not fall within the valid range of SSNs. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must correct the SSN on the SAR, submit a new FAFSA with the correct SSN, or contact the SSA.

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Field or Control	Description
SSA Citizenship Indicator (social security administration citizenship indicator)	If you try to award federal monies to the student for the field values that do not allow you to award federal financial aid, the Validation routine returns a zero award amount and the following award message: *DB Match: SSA Citizenship Indicator denotes student is not Federally eligible.* *Alien/cond:* The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student. *Alien/stud* (alien student): The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student. *foreign bn* (foreign born): The student was born in a foreign country to American parents who were stationed in another country. The student must provide of citizenship, such as a birth certificate indicating that the student is a U.S. citizen born abroad to be eligible for federal financial aid. The Validation routine allows you to award federal financial aid to this student. *LA/wk elig* (legal alien, work eligible): The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student. *LA/wkinelg* (legal alien, work ineligible): The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student. *Name/DOB:* The SSA was unable to verify the student's citizenship because there was no match on SSN, name, or date of birth. The Validation routine does *not* allow you to award federal financial aid to this student. To receive federal financial aid, the student must make corrections to Social Security Number, name or date of birth on the SAR or submit a new FAFSA with the correct information. If the student believes the provided information is correct, the student must contact the Social Security Administration and provide documentation that verifies citizenship status. *Other:* See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags. *U.S. Citiz* (U.S. citizenship): The SSA confirmed the student's U.S. citizenship status. The Validation routine allows you to award federal financial aid to this student.

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Field or Control	Description
DHS/INS Match Flag (Department of Homeland Security / Immigration and Naturalization Service match)	If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: INS match code indicates student is not federally eligible.* Values are: *Confirmed:* The INS confirmed the student's non-citizen eligibility. The Validation routine allows you to award federal financial aid to this student. *Late:* See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags. *Mismatch:* The INS match was not conducted, because the student did not indicate citizenship status, the student changed from eligible non-citizen to citizen or changed the Alien Registration Number, or the student did not provide a valid Alien Registration Number. The Validation routine does *not* allow you to award federal financial aid to this student. *Not Conf* (not confirmed): The INS did not confirm the student's eligible non-citizenship status. The Validation routine uses the value of the **Sec INS Match Flag** field to determine whether to award federal financial aid to this student.
Sec DHS/INS Match Flag (secondary Department of Homeland Security / Immigration and Naturalization Service match flag)	Values are: *Pending:* Automated secondary confirmation in progress. The Validation routine does *not* allow you to award federal financial aid to this student. *Confirmed:* Citizenship confirmed. The Validation routine allows you to award federal financial aid to this student. *Not yet:* In continuance. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must wait another 10 days for an updated ISIR or send copies of the student's proof of eligibility to the INS. *Not Conf* (not confirmed): Citizenship not confirmed. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must send copies of the student's proof of eligibility to the INS. *No info:* INS needs more information. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must send copies of the student's proof of eligibility to the INS.

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Field or Control	Description
VA Match (veteran's administration match)	If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: VA match code indicates student is not federally eligible.* *Active Dty* (active duty): Record found on VA database but applicant is on active duty. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student. *Confirmed:* Veteran status confirmed. Student is eligible for federal aid. *No Qualify:* Record found on VA database but the student is not a qualifying veteran. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student. *Not Found:* Record not found on VA database. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student. *Not Sent:* Record not sent for match. Student is eligible for federal aid.

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Field or Control	Description
Selective Service Match	If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Selective service match code indicates student is not federally eligible.* **Note:** When awarding a student whose gender is defined as female in Bio/Demo data, this field has no bearing on awarding federal financial aid. *Exempt:* Student is within 45 days of his birthday, and is temporarily exempt because the student is not yet 18 years old. An update is not required during the year. The Validation routine allows you to award and disburse federal financial aid with this field value. *Mismatch:* The student could not be registered with Selective Service, because the student is not between the ages of 18 and 26 or information needed to register the student is missing. *Not Conf* (not confirmed): The student is not registered with the Selected Service. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, the student must register with Selective Service, present appropriate registration that he is already registered, or qualify for a waiver or exemption. *Reg Conf* (registration confirmed): Match conducted and the applicant's registration status is confirmed by the Selective Service. The Validation routine allows you to award and disburse federal financial aid with this field value. *Ret Late:* See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.
Selective Service Registration	Values are:*Exempt, Late, Mismatch, Not comp* (not completed), and *Reg Conf* (registration confirmed).

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Field or Control	Description
NSLDS Match (National Student Loan Data System Match)	If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: NSLDS match code indicates student is not federally eligible.* *Def/Ovrpay* (default/overpayment): A match for the student was found, and the student has at least one loan in default and owes at least one overpayment. The Validation routine does *not* allow you to award and disburse federal financial aid with this field value. *Default:* A match for the student was found, and the student has at least one loan in default. The Validation routine does *not* allow you to award and disburse federal financial aid with this field value. *Eligible:* A match for the student was found, and the student's NSLDS data is sent. The Validation routine allows you to award and disburse federal financial aid with this field value. *Init/Late:* See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags. *Mismatch:* A match for the student's SSN was found, but neither name nor date of birth matched. No NSLDS data is sent. You must access NSLDS online using SSN only to retrieve the matching data and determine whether the record belongs to the student. If the record belongs to the student, you must determine whether the student is eligible for federal financial aid. If the record does not belong to the student, the student is eligible for federal financial aid. *No Data:* No match for the student was found. The student does not have NSLDS data. The Validation routine allows you to award and disburse federal financial aid with this field value. *Not Sent:* A match for the student was found, but no NSLDS data was sent to the CPS/FPS. The Validation routine allows you to award and disburse federal financial aid with this field value. *Overpayment:* A match for the student was found, and the student has received at least one overpayment of federal student aid funds (Pell Grant, FSEOG, or Perkins). The Validation routine does *not* allow you to award and disburse federal financial aid with this field value. *Partl Elig* (partially eligible): A match for the student was found, and the student has received a total amount of student loans that is close to the loan limits established for the

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Field or Control	Description
	federal loan programs. The Validation routine allows you to award and disburse federal financial aid with this field value, but use caution to ensure that the student does not exceed his or her loan limits with subsequent Title IV loans.
Prisoner Match	This database match indicates a student's incarcerated status. If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Prisoner match code indicates student is not federally eligible.* **Note:** When processing awards using institutional data (not ISIR data), the Packaging process uses the *Not Prisnr* (not a prisoner) value for this database match. Values are: *Blank:* The system does *not* allow you to award federal financial aid to this student. *Local:* The student is incarcerated in a local facility. The student is *not* eligible for federal loans but is eligible for other federal financial aid. If a federal loan is awarded to the student, the amount is reduced to zero by the Validation process, and an award message indicates the reason for the zero amount. *Not conduc* (not conducted): The student's record was sent but the database match was not conducted. The Validation routine does *not* allow you to award federal financial aid to this student. *Not Prisnr* (not a prisoner): The student is not incarcerated in a state or federal prison. The Validation routine allows you to award and disburse federal financial aid with this field value. *Not sent:* The student's record was not sent for a prisoner database match. If the student's name or date of birth is missing, the Validation routine does *not* allow you to award federal financial aid to this student. If the student is a Pacific Islander and the student's SSN begins with 888, the Validation routine allows you to award and disburse federal financial aid to this student. *State/Fed* (state/federal): The student is incarcerated in a state or federal facility. The Validation routine does *not* allow you to award federal financial aid to this student.

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Field or Control	Description
Drug Offense Conviction	This database match indicates the student's status relative to drug offense convictions due to either *drug abuse debarment and suspension activity* or *terms of the Anti-Drug Abuse Act of 1998*. The student can be ineligible for federal financial aid due to a drug offense conviction or pending activity. If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Drug Offense Conviction match code indicates student is not federally eligible.* **Note:** When processing awards using institutional data (not ISIR data), the Packaging process uses the *1 – Eligible* value for this database match. Values are: *Blank:* no value in this field plus a SAR C flag means the system does *not* allow you to award federal financial aid to this student. *1 – Eligible:* The student is eligible for federal financial aid. The system allows you to award and disburse federal financial aid with this field value. *2 – Partially Eligible:* The student becomes eligible for federal financial aid during the award year. The period of eligibility depends on the type of aid. For loans, the student becomes eligible for loans during the Loan Period. For all other aid, the student becomes eligible at the beginning of the term for which the student was cleared of the drug offense conviction. The system treats the student as fully eligible for all term/disbursement periods. It is your responsibility to limit the student's eligibility to a specific term/disbursement period as needed. When a federal aid award is made, the full award amount is awarded and the following Award Message is displayed: *DB Match: Drug Offense Conviction match equals '2 - Partially Eligible'. Verify the amount of this award to ensure proper term/loan period eligibility.* *3 – Ineligible:* The student is not eligible for federal financial aid due to the student's current or pending drug conviction activity. The system does *not* allow you to award federal financial aid to this student.

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Field or Control	Description
Father's SSN Match and **Mother's SSN Match**	The system performs an eligibility check on each parent's social security number match based on the Database Matches and Match Flags specifications. If either of the match flag values for the parents' social security numbers results in a failed match with SSA, the student does not receive federal aid. On the Database Matches page, despite there being two SSN Match fields for the mother and father, only one **Override** check box exists for the parents' SSN match. The **Override** check box controls both. If the father's social security number is a match and the mother's is not or vice versa, or both mother and father are not a match, and if you select the **Override** check box for the parents' SSN match override field, the system considers the match to be good and awards the student federal aid. **Note:** When you override a federally reported database match value, your institution assumes full responsibility for changing these values.
Dept of Defense Match (department of defense match)	**Note:** Only applicable for the 2023-2024 and prior Aid Years. Select to identify the student as a child of a post-9/11 deceased military service member. Once selected, use the Professional Judgment component to award the student all Title IV funding as eligible, either as a Pell-eligible (zero EFC/SAI) or not Pell-eligible (original EFC/SAI) candidate.
PLUS Override	Select to identify a dependent undergraduate student who is eligible for additional Unsubsidized Stafford Loan because his or her parents are deemed a credit risk or for professional judgement reasons. If you select this check box, the Packaging process does not award a PLUS loan and allows a dependent undergraduate student to become eligible for additional Unsubsidized Stafford Loan funds. This field also displays on the aggregate aid summary components, for aggregate areas that correspond to either the FFELP or Direct Loan programs.
Title IV Fund Eligibility	Select to identify the student as eligible for Title IV funds. If the check box is cleared, no federal aid is awarded to the student. This field is evaluated when an ISIR is received for the student and is cleared if error code 19 is reported on the ISIR.
Special Circumstances Flag	Select if the student's Special Circumstances Flag = 4, Dependent record unsubsidized loans only. Use the Professional Judgment component to award this rejected dependent student an unsubsidized loan.

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Field or Control	Description
HEAL Eligible and **PreProfessional Coursework**	Select to increase Stafford loan limits for eligible health professional or preparatory coursework candidates. **Note:** Packaging and Repackaging processes do not automate the awarding of an additional Unsubsidized Stafford amount based on a student participation in an eligible health profession program or preparatory coursework program. Additional Unsubsidized Stafford amounts must be awarded from the Professional Judgement page (Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement). If a Direct Loan Unsubsidized Stafford award is based on participation in an eligible health professional program or preparatory coursework, you must select the relevant check box here on the Database Match page before you build the Direct Loan origination application record. Indicators are carried forward to the Direct Loan origination application record for COD reporting. The **HEAL Eligible** and **PreProfessional Coursework** check boxes have no impact on the Packaging and Repackaging components and are used only by Direct Loan COD reporting for Unsubsidized Stafford loans.

Reviewing the U.S.E.D. Database Match Process

To evaluate database matches, Campus Solutions uses the ISIR Comment table as the basis for determining the student's eligibility for federal aid. Administrators can control eligibility through the severity level value assigned to an ISIR comment. The system compares ISIR comments on the student's record to the ISIR Comment table and evaluates eligibility for federal aid based on that database match.

The **DB Match Use** value in the ISIR Comment table corresponds to a U.S.E.D. database match. Each comment is associated with a severity level. The severity level associated with the **DB Match Use** field effects how the system handles the database match during packaging.

Severity levels are pre-defined according to the combination of the database match value, ISIR comments, and the presence of reject codes and SAR C flag. The values are as follows:

Severity Level	Resolution
0	Ignore. Requires no action. Federal aid can be awarded.
1	Action required. Indicates a reject condition exists for the assigned DB Match Use value. Federal aid cannot be awarded. Database match needs resolution.
2	Action required. Indicates SAR C on file. Federal aid cannot be awarded. Database match needs resolution.

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Based on these severity levels, if a student has an ISIR comment with a severity level 1 or 2 and the **DB Match Use** field is not blank, the system does not award the student federal aid until the errant condition, and therefore the corresponding ISIR comment, are resolved.

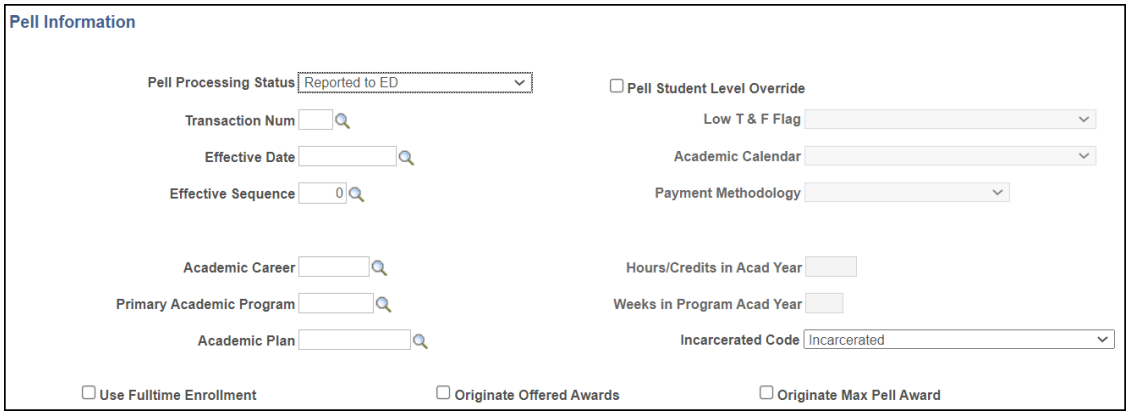
> **Note**
>
> The **DB Match Use** and **SAR C Flag** values are set based on the most recent ISIR record loaded for the aid year.

See Setting Severity Levels for ISIR Comment Codes.

Reviewing Pell Information

Access the PELL Information page (click the **PELL** link on the Packaging Status Summary page).

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



The fields on this page are populated when Pell data, from the ISIR, is loaded in the system.

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Field or Control	Description
Pell Processing Status	Displays information about the status of a student's Pell payment processing. *Accepted:* Default value populated from the inbound Pell Payment file (EPPPD) when the ED Record Status is Accepted. *Not Sent:* Use this status to prevent the student from being included in the Pell Payment request run. You must enter this status manually. *Pending:* Default value if a Pell Grant is awarded to the student. Indicates that the student's file is waiting to be sent with a Pell Payment request (EPPPD) submission. *Pending* may also indicate a previously accepted Pell Payment request (EPPPD), which has since come back as *not* equal to an Accepted or Accepted w/Assumption outcome. *Repackaged:* Indicates an initial Pell Grant has been changed. You must change this status to *Send* before the student is included in the Pell Payment request run. Incoming Pell Payment (EPPPD) files do not load if the status is *Repackaged.* Review SQR log upon loading Pell Payment (EPPPD) files. *Reported:* is automatically set when a student's Pell data has been selected during an EPPPD SQR run. *Review:* is populated by default from the inbound Pell Payment file (EPPPD) when the ED Record Status is Rejected, Error, Accepted w/ Assumptions, or Duplicate. *Selected:* is automatically set as a result of running the FAPELLR process. Incoming Pell Payment (EPPPD) files do not load if Pell Processing status has been reset to *Selected.* Review SQR log upon loading Pell Payment (EPPPD) files. *Send:* This status is an internal Pell Processing flag for the system. It indicates that the student's record is ready to be transmitted on an outbound Pell Payment (EPPPD) file. This field value is either set manually or through Mass Change. Incoming Pell Payment (EPPPD) files do not load if the Pell processing status has been reset to *Send* since the (EPPPD) creation. Review SQR log upon loading Pell Payment (EPPPD) files.
Transaction Nbr (transaction number) and **Effective Sequence**	Displays the transaction number and effective sequence from the selected ISIR, usually the most recent ISIR. All ISIRs are available for selection and you can change these values to indicate another ISIR. If you want to enter a Pell amount manually when awarding a Pell Grant, use the transaction number, effective date, and effective sequence to indicate the ISIR that you used to calculate the Pell amount.

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Field or Control	Description
Primary Academic Program	Indicates the student's main academic program. The academic program from the student's Financial Aid Term record is the default value in this field.
Incarcerated Code	Select the appropriate incarcerated code: *N - No longer Incarcerated* or *Y - Incarcerated.* This field is left blank for most students.
Use Fulltime Enrollment	Select this check box if you want to use full-time enrollment to calculate the student's Pell award.
Originate Offered Awards	Select this check box to originate Pell awards with an award status of *Offered.* If this check box is cleared, Pell awards are only originated when the award status is *Accepted.*
Originate Max Pell Award (originate maximum Pell award)	Select this check box to originate Pell awards based on the maximum Pell award defined on the Pell Payment Setup page. The system originates the maximum Pell amount regardless of how much the student was offered for the Pell award.
Pell Student Level Override	Select this check box to override at the student level the payment plan information that you set up on the Pell Payment Setup page. When you select this check box, the **Low T&F Flag, Academic Calendar, Payment Methodology, Pell Payment Periods, Hours/Credits in Acad Year,** and **Weeks in Program Acad Year** fields become available.

Related Topics

- Defining Pell Payment Setup
  Access the Pell Payment Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Pell Grants**, and then **Pell Payment**, and then **Pell Payment Setup**).
- Awarding Pell Grants for the 2022-2023 and 2023-2024 Aid Years
  This section provides an overview of Pell Grant awarding and discusses how to:

Overriding Pell Eligibility Calculation Setup Values

Access the Student Override page (click the **PELL Calculation Override** link on the Packaging Status Summary page).

Field or Control	Description
Status	Select Active to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods. Select Inactive to use the PEC setup at FA installation, career, or program level.

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Field or Control	Description
Pell Calculation Start	Enter the calculation mode to use for Pell calculations made before the student's academic term start date. Values are: *Enrollment Current Load (For use only with 2009 and prior Aid Years):*Directs the Pell calculation to use the **Current Load** value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The **Current Load** value uses the number of units that the student is currently enrolled in, plus the number of units from already completed sessions in the term to determine the student's load for the term. *Enrollment FA Load (For use only with 2009 and prior Aid Years):* Directs the Pell calculation to use the **FA Load** value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The **FA Load** value uses the number of financial aid eligible units that the student is enrolled in for the term to determine the student's load. *Formula 1 — FA Load (For use only with 2010 and future Aid Years):* Directs the Pell calculation to divide the Pell Grant award by the **Pell Number of Terms** and uses the student's actual FA Load for each term. *Formula 1 — Full-time (For use only with 2010 and future Aid Years):* Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses Full-time as the student's FA Load for each term. *Formula 3 — Current Load (For use only with 2010 and future Aid Years):* Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the **Current Load** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The **Current Load** value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term. *Formula 3 — FA Load (For use only with 2010 and future Aid Years):*Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the

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Field or Control	Description
	denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the **FA Load** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The **FA Load** value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load. *Formula 3 — Full-time Load (For use only with 2010 and future Aid Years):*Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility. *Full Time (For use only with 2009 and prior Aid Years):* Directs the Pell calculation to always use the full time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant regardless of the student's enrollment. *Half Time (For use only with 2009 and prior Aid Years):* Directs the Pell calculation to always use the half time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant, regardless of the student's enrollment.
Pell Calculation Midterm	Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.
Pell Calculation Census	Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.
Academic Base Weeks	Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and, for 2023-2024 and prior Aid Years, to calculate prorated Expected Family Contribution (EFC). Valid values are 0.0 to 99.9.
Non-Standard Base Weeks	Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and, for 2023-2024 and prior Aid Years, to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions. Valid values are 0.0 to 99.9.

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Field or Control	Description
Pell Number of Terms	Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no automatic cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using *Formula 1 - FA Load* or *Formula 1 - Full-time* Pell calculation values. If you select *Formula 1 - FA Load* or *Formula 1 - Full-time*, you must populate the Pell Number of Terms field. Valid values are *0 to 99*.
Use PELL Crossover Logic	Select this check box if you want the system to a check the summer/crossover term to determine if a Pell Grant award for that term would be higher if it is awarded using the *Additional* Pell Item Type for the current Aid Year (e.g. Aid Year 2018) or the *Initial* Pell Item Type in the forward Aid Year (e.g. Aid Year 2019). If selected and the award would be higher for the forward Aid Year, the system awards zero Pell Grant for the summer/crossover term under the Additional Pell item type the current Aid Year. If the Pell Grant award for the summer/crossover term is higher using the current Aid Year, it will award the amount as Additional Pell. If *not* selected, the system awards Pell Grant for the summer/crossover term as Additional Pell in the current Aid Year without additional checks against the forward Aid Year.

Related Topics

- Defining Installation Level Defaults

Reviewing the Student's Financial Aid Status

The Financial Aid Status page is a display-only page primarily suited for front office staff to provide a high level assessment of a student’s financial aid application for the aid year. Many of the fields and links displayed on the Financial Aid Status page are described in the Packaging Status Summary page documentation. Please refer to that documentation for field and link descriptions, keeping in mind that all fields in the Financial Aid Status page are display only.

> **Note**
>
> The Financial Aid Status page is a display-only page.

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> **Note**
>
> The Financial Aid Status page displays many of the same fields and data as the Packaging Status Summary page. Please refer to the Packaging Status Summary page documentation for descriptions of many of the fields and links in the Financial Aid Status section.

See Reviewing the Packaging Status Summary Page.

Page Used to Review the Student's Financial Aid Status

Page Name	Definition Name	Navigation	Usage
Financial Aid Status	SS_FA_AU_STATUS	Financial Aid, View Financial Aid Status	View selected information regarding a student's financial aid application status.

Reviewing the Financial Aid Status Page

Access the Financial Aid Status page (**Financial Aid**, and then **View Financial Aid Status**).

Page Header

Field or Control	Description
Date Application Received	Displays the date that the U.S.Department of Education's (ED's) Central Processing System (CPS)/FAFSA Processing System (FPS) received the initial application for the Aid year in context. This date *never* changes, even on subsequent ISIR transactions. This value comes from the most recently loaded ISIR.
CPS Process Date (central processing system date)	For the 2023-2024 and prior aid years, displays the CPS Transaction Processed Date from the most recently loaded ISIR. This date changes with each ISIR transaction.
FPS Process Date (FAFSA processing system date)	For the 2024-2025 and future aid years, displays the FPS Transaction Processed Date from the most recently loaded ISIR. This date changes with each ISIR transaction.
Institution Process Date	Displays the date when the Institution loaded the most recent ISIR for the student. This date changes with each new ISIR loaded.
Correction Status	Displays the student's current ISIR **Correction Status**.
Correction Status Date	Displays the date when the student's current ISIR **Correction Status** was set.

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Packaging Status Summary

Field or Control	Description
Package Status	Displays the same data as the Aid Processing Status field on the Packaging Status Summary page.
SAP (satisfactory academic progress)	Displays the same data as the Satisfactory Academic Progress field on the Packaging Status Summary page.
Entrance Interview	Displays the same data as the Loan Entrance Interview Status field on the Packaging Status Summary page. **Note:** The **Entrance Interview** field displays when the Financial Aid Installation default for **Loan Counseling Version** is *Simple*.
Exit Interview	Displays the same data as the Exit Interview field on the Packaging Status Summary page. **Note:** The **Exit Interview** field displays when the Financial Aid Installation default for **Loan Counseling Version** is *Simple*.

> **Note**
>
> If the Installation default for **Loan Counseling Version** is *Expanded*, details regarding the student's **Entrance Interview** and **Exit Interview** loan counseling data are presented in a separate Loan Counseling Status section after the Comments section.

Checklists

Field or Control	Description
Item Code	Displays the Checklist **Item Code** being tracked. If hyperlinked, click the hyperlink to open the Person Checklist Management page for this **Item Code**. If you receive an error or the **Item Code** does not appear as a hyperlink, you do not have permission to view Person Checklist Management.
Status	Displays the status of the checklist item: Values are *Initiated* or *Completed*.

Communications

Field or Control	Description
Method	Displays the type of communication such as letters, email, phone calls, personal contact, facsimiles, and so on.
Direction	Displays the direction of the communication. For example, the communication is outgoing.

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Field or Control	Description
Letter Code	Displays a code associated with the context and function selected for this communication.
Context	Displays the Communication **Context** for this Communication. If the field is hyperlinked, click the hyperlink to open the Person Communication Management page for this Communication **Context**. If you receive an error or the **Context** does not appear as a hyperlink, you do not have permission to view Person Communication Management.
Unsuccessful Outcome	When checked, indicates the communication was unsuccessful.
Outcome Reason	Displays the reason the communications outcome was unsuccessful.

Comments

Field or Control	Description
Category	Displays the business need with which this comment is associated.
Comment Date	Displays the date when the comment is entered.
Entered By	Displays who entered the comment.

Loan Counseling Status

This section appears if the Installation Default for **Loan Counseling Version** is *Expanded*. Displays the same information as the Loan Counseling data page, but in display-only mode.

See Managing Loan Counseling Data.

FA Term Information

Displays the term, description, career, academic plan, NSLDS loan year, and Term Source for all built terms for this aid year.

Student Groups

Field or Control	Description
Group Name	Displays a student group such as *Athletes*.

> **Note**
>
> You must have either Inquiry or Update access to the Student Group for this to display

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Edit Messages

Field or Control	Description
Term	Displays the term with which the Message is associated.
Msg Type (message type)	Displays Message Type. Values are *Error*, *Informtnl* (informational), and *Warning*.
Msg Action (message action)	Displays the current action taken on the edit message. Values are *None Taken*, *Pending*, and *Resolved*. Edits set to a resolved status do not hold financial aid disbursements.
Date Completed	Displays the date that the Message Action field was set.
Msg Code (message code)	Displays the Message Code. If the field is hyperlinked, click the hyperlink to open the Maintain User Edit Messages. If you receive an error or the Message Code does not appear as a hyperlink, you do not have permission to view Maintain User Edit Messages.
Comments	Click the **View** link to view Edit Messages **Comments**. If you receive an error or the Message Code does not appear as a hyperlink, you do not have permission to view Maintain User Edit Messages Comments.

Links

Field or Control	Description
Pell Information	Links to the same information as the PELL link on the Packaging Status Summary page.
Request Counselor Action	Click to access the Request Counselor Action page.
Financial Aid Awarded	Link appears when the student has one or more financial aid awards. Click to access the Financial Aid Awards page and view the student's financial aid awards.
Perkins MPN Required	Click to access the Perkins MPN page to view MPN information and loan history. **Note:** The system displays **Perkins MPN Required** without a link if the system determines that a Perkins MPN is required and a Perkins MPN record does not exist.

Managing Aggregate Aid

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

NSLDS data can be used to update aggregate aid system tables. For more information,

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See Setting Up Aggregate Aid.

See Using NSLDS Data and Processes.

This section discusses how to:

- Update aggregate aid.
- Assign aggregate sources.

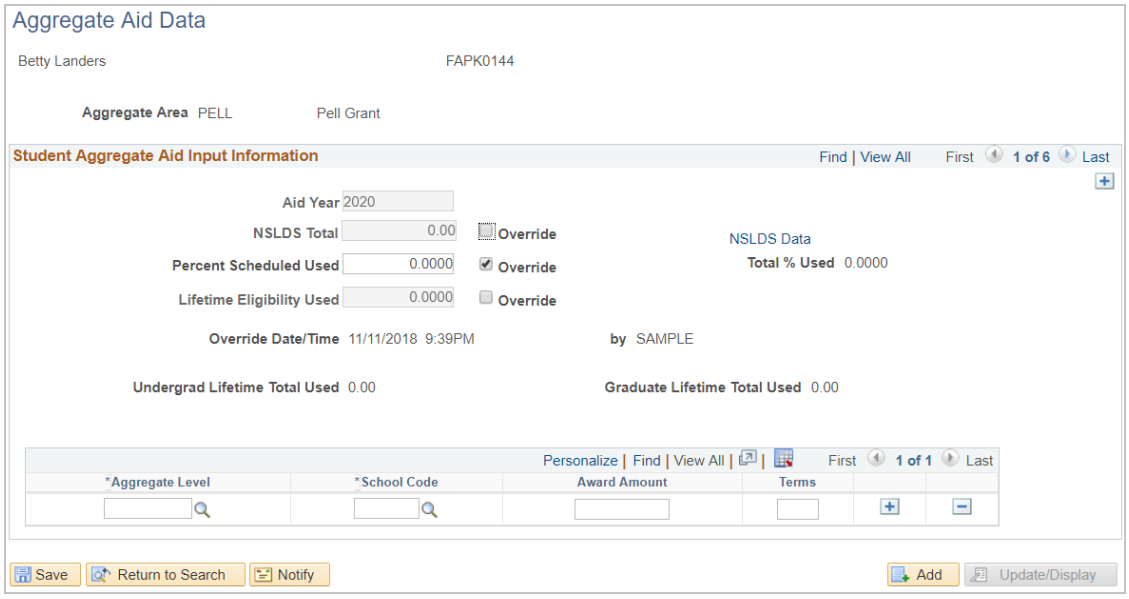
Pages Used to Manage Aggregate Aid

Page Name	Definition Name	Navigation	Usage
Aggregate Aid Data	STDNT_AGGR_INPUT	**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **Update Incoming Aggregates**, and then **Aggregate Aid Data**	View or update lifetime total amounts for each aggregate area.
Aggregate Source	SFA_RUN_SETAGGRSRC	**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **Assign Aggregate Source**, and then **Aggregate Source**	Set the aggregate source to assess a student's lifetime aggregate aid history during the Awarding and Packaging process.

Updating Aggregate Aid Information

Access the Aggregate Aid Data page (**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **Update Incoming Aggregates**, and then **Aggregate Aid Data**).

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



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This page displays the student's aggregate aid data by Aggregate Area and allows the entry of data by **Aggregate Area** and **Aid Year.** In addition to manual update, the data displayed on this page can be updated by the internal NSLDS Push process. The Packaging Aggregate Source and type of aggregate area determine how the elements that appear on this page are used in the packaging process.

Two major award limit checks are performed during the packaging process:

- The Lifetime limit check uses the total fields that the Packaging Aggregate Source Indicator designates:
  - If the Packaging Source is NSLDS, then the NSLDS Total amounts are used to identify the amount of lifetime limit expended.
  - If the Packaging Source is PS (PeopleSoft), then the Undergrad and Graduate Lifetime Total Used amounts are used to identify the amount of lifetime limit expended.
- The Annual limit check, regardless of Packaging Source, always assesses any aggregate level detail entered for the aid year being packaged.
- From aid year 2027 onward, fields related to One Big Beautiful Bill (OB3) will appear on this page.

Field or Control	Description
NSLDS Total	Displays the aggregate total that has been loaded and pushed from NSLDS tables. You can override this value to enter lifetime totals that are applicable to the context aid year. **Note:** As of Aid Year 2010, NSLDS Total is not used in the calculation of Pell awards.
NSLDS Undergrad Total	Applicable only for the aggregate area defined as a federal TEACH grant. **NSLDS Undergrad Total** is calculated during the aggregate push routine, by summing applicable NSLDS transactions by TEACH program and academic levels 0 – 5. You can override this value to enter lifetime totals that are applicable to the context year.
NSLDS Grad Total	Applicable only for the aggregate area defined as a federal TEACH grant. **NSLDS Grad Total** is calculated during the aggregate push routine, by summing applicable NSLDS transactions by TEACH program and academic levels 6 – 7. You can override this value to enter lifetime totals that are applicable to the context aid year.
Override (override for NSLDS Total)	Select this check box to override the **NSLDS Total** field value. If an override is performed, the date/time stamp and operator ID is captured.
NSLDS Data	Click this link to view detailed NSLDS data that has been loaded to the student's record. A link appears for aggregate areas that have a valid NSLDS aggregate cross-reference.

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Field or Control	Description
Percent Scheduled Used	Displays the percentage of a student's Pell Grant Maximum (Max) Scheduled Award used at prior institutions from NSLDS or, if overridden, manually populated by the user. Valid values are 000.0 to 200.0. The field can exceed 100.0 when a student has received the Max Scheduled Award for first Pell Grant (Pell1) plus a partial or Max Scheduled Award for second Pell Grant (Pell2) at prior institutions. Packaging always uses the Percent Scheduled Used as part of its Pell eligibility determination regardless of the designated Aggregate Source (NSLDS or PS).
Override(override for Percent Scheduled Used)	Select this check box to manually override the **Percent Scheduled Used** field value.
Total % Used	Displays the sum of **Percent Scheduled Used** and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 200.0. **Note:** The system uses these internal fields (not displayed on any pages) to calculate **Total % Used**: Max Scheduled Award (full-time, full-year Pell Grant award based on Pell COA and EFC), and student's remaining Pell Grant eligibility (Max Scheduled Award minus Percent Scheduled Used).
Lifetime Eligibility Used	Displays the student's Pell Grant Lifetime Eligibility Used as a percentage. Valid values are 0000.0000 to 9999.9999. This field is populated by the Aggregate Push routine and can be manually overridden by the user.
Override(override for Lifetime Eligibility Used)	Select this check box to manually override the **Lifetime Eligibility Used** field value.
Undergraduate Lifetime Total	View lifetime totals from all undergraduate grade levels. The amount is updated as a result of the Awarding and Packaging process. It includes any external award amounts entered on this page for the corresponding aid year. Used when Packaging Aggregate Source = PS.

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Field or Control	Description
Graduate Lifetime Total	View lifetime totals from all graduate grade levels. The amount is updated as a result of Awarding and Packaging process. It includes any external award amounts entered on this page for the corresponding aid year. The student's undergraduate total may also be included, depending on whether the aggregate area has cumulative or distinct lifetime limits. Used when Packaging Aggregate Source = PS. *Cumulative:* The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. For example, if the student's undergraduate amount is 20,000 USD and the graduate amount is 40,000 USD, then the student cannot receive more than 40,000 USD for this aggregate area. *Distinct:* The undergraduate and graduate limits are tracked separately. For example, if the student's undergraduate amount is 20,000 USD and the graduate amount is 40,000 USD, then the student can receive up to 60,000 USD for this aggregate area. With the OB3 implementation, this field will hold lifetime totals for both graduate and professional students that are grandfathered under the legacy provision. If the student is awarded under OB3 aggregates, this field will only hold lifetime total for a graduate student. The graduate limits awarded under the OB3 aggregate will be tracked as distinct, meaning the student's undergraduate amount will not be included in this field.
Aggregate Level	Select an aggregate level that corresponds with the external award data entered for the student.
School Code	Select a school code that corresponds with the external award data entered for the student.
Award Amount	Enter the amount of the expected award that corresponds with the external award data entered for the student.
Loans	Click to access the Aggregate Loan Data page and enter loan and lender information for CommonLine loans.
Professional Lifetime	Introduced with OB3 implementation to view lifetime totals from professional grade levels. The amount is updated as a result of Awarding and Packaging process. It includes any external award amounts entered on this page for the corresponding aid year. Used when Packaging Aggregate Source = PS.
Parent PLUS (UG)	Introduced with OB3 implementation to view lifetime totals for undergraduate students that received a Parent PLUS Loan tied to a Parent PLUS aggregate area. Used when Packaging Aggregate Source is = PS.

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Assigning Aggregate Sources

Access the Aggregate Source page (**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **Assign Aggregate Source**, and then **Aggregate Source**).

To assess a student's lifetime aggregate aid history, Aggregate Source directs the Awarding and Packaging processes to use either the NSLDS aggregate totals or system generated undergraduate lifetime and graduate lifetime totals. You can set the aggregate source at the financial aid installation default level and on the Packaging Status Summary page, in addition to each of the award page components. This option permits you to assign the aggregate source value in batch for an individual student, all students, or a subset of students. The batch assignment process updates the aggregate source value on the student's Packaging Status Summary page.

Field or Control	Description
Institution	Select the institution for which you want to create a request file.

Population Selection

Field or Control	Description
All Students	Select to request that the aggregate source value established on FA Installation Defaults be used for all students for the selected aid year.
Students in List	If you select this option, a grid displays that permits you to enter a list of student IDs.
Use Query	If you select this option, a **Select Query** button appears. When you click the button, the system displays a standard Select Query lookup page. You should enter the full or partial name of the query as a search key because the prompt goes through the entire list of available queries in the database. Because the Batch Inform File requires certain fields in a particular order, you can only use queries that return the required fields. A baseline query (SFA_AGGR_SOURCE) is delivered that you can use to create a population of students. Minor changes to the query may be required to suit your institutional needs. You can also define your own query using PeopleSoft Query Manager. We recommend that you use SFA_AGGR_SOURCE as a model or template.

Aggregate Source

Field or Control	Description
FA Installation Default	Select to assign a value of *Default* to the **Aggregate Source** on the Packaging Status Summary page.
NSLDS Total	Select to assign a value of *NSLDS* to the **Aggregate Source** on the Packaging Status Summary page.

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Field or Control	Description
PS Aggregates	Select to assign a value of *PeopleSoft* to the **Aggregate Source** on the Packaging Status Summary page.

Using Mass Change for Packaging Status Attributes

> **Important**
>
> Mass Change is a deprecated product. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

You might sometimes want to change the value of a field on the Packaging Status Summary page for a group of students. Mass Change makes this possible. Mass Change definitions for the ED Verification Status and Satisfactory Academic Progress (SAP) fields are included with your system. You can create additional Mass Change definitions for other fields on the Packaging Status Summary page that you want to change. The process for changing packaging status attributes using Mass Change requires four steps.

This section discusses how to:

- Select students.
- Review selected students.
- Move students into financial aid batch update.
- Update packaging status attributes.

Related Topics

- Campus Solutions Application Fundamentals: Understanding Mass Change in Campus Solutions

Pages Used to Use Mass Change for Packaging Status Attributes

Page Name	Definition Name	Navigation	Usage
Review Mass Change Selection	FA_SAA_REVIEW_MC	**Financial Aid**, and then **Federal Application Data**, and then **Select SAP/ Verification (MC)**, and then **Review Mass Change Selection**	Review the students selected by the Mass Change select process before moving on to the next step.
Update Student Aid Attribute	PRCSRUNCNTL	**Financial Aid**, and then **Federal Application Data**, and then **Update SAP/ Verification Status**, and then **Update Student Aid Attribute**	Update the Packaging Status Attributes table after you have moved the selected students to the Financial Aid Batch Update area.

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Selecting Students

To change the value of a packaging status attribute for a group of students, the first step is to select the students for whom you want the attribute changed. Use a Mass Change definition to select students. Two Mass Change definitions exist in the system for your use. FA-Verification Status Select is used for changes to the **ED Verification Status** field, and FA-Sat Acad Progress Select is used for changes to the **Satisfactory Academic Progress** field. You must create Mass Change definitions for changes to other packaging status attributes.

After you have completed the Mass Change definition, execute the Mass Change Select process using the Run Mass Change page. This process places information about the selected students in a temporary table.

Reviewing Selected Students

Access the Review Mass Change Selection page (**Financial Aid**, and then **Federal Application Data**, and then **Select SAP/Verification (MC)**, and then **Review Mass Change Selection**).

Field or Control	Description
Students Selected	Displays the number of students selected by the Mass Change select process.
New Setting of Indicator and **Will be**	Displays the field that Mass Change changes and the new value of the field.
Status	These status codes are delivered as part of PeopleTools. You can define how you use these statuses in your Mass Change routine. You can remove students from the selection by making their status *Cancel* or by deleting the row. *Approved:* Not applicable in this process. *Cancel:* Use this status code if you want to eliminate a student from the mass change. *Error:* Indicates that the Mass Change process encountered an error when attempting to move the student into the Financial Aid Update record. *Pending:* Indicates that the Mass Change process moved this student into the Financial Aid Batch Update area. *Successful:* Indicates that the Mass Change process moved the student into the Financial Aid Batch Update record.
Cur Val (current value)	Displays the current value of the field to be changed.

Moving Students into Financial Aid Batch Update

In this step, you run a Mass Change to move the selected and reviewed students from the temporary table used in the selection process into the Financial Aid Batch Update area so the packaging status attributes can be changed. You use a Mass Change definition for this step. Two Mass Change definitions exist in the system for your use: FA-Verification Status Update for changes to the **ED Verification Status** field, and FA-Sat Acad Progress Update for changes to the **Satisfactory Academic Progress** field. You must create Mass Change

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definitions for changes to other packaging status attributes. You must run this Mass Change process because the FA-Upd Stdnt Aid Attr Tbl process (FASAAUPD) you run next looks for data in the Financial Aid Batch Update area, not in the temporary table.

After you have completed the Mass Change definition, run the Mass Change Selection using the Run Mass Change page.

Updating Packaging Status Attributes

Access the Update Student Aid Attribute page (**Financial Aid**, and then **Federal Application Data**, and then **Update SAP/Verification Status**, and then **Update Student Aid Attribute**).

Run the FA-Upd Stdnt Aid Attr Tbl (financial aid - update student aid attribute table) process (FASAAUPD) to update packaging status attributes.

Awarding Restricted Aid

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

- Enter a student's restricted aid.
- Enter committee comments.
- Enter committee member comments.
- Evaluate a student's restricted aid.

Understanding Restricted Aid

Restricted aid includes awards such as scholarships, fellowships, and institutional or private funds with subjective eligibility requirements. Restricted aid does not refer to federal monies. The restricted aid pages enable you to monitor the process of awarding restricted aid from the application process through committee evaluation and ranking, to the final decision for the award. The requirements for each type of restricted aid are defined in the Restricted Aid Table component.

The process for awarding restricted aid involves the following steps.

1. Enter the student being evaluated for restricted aid on the Restricted Aid page.

   You must enter the **Restricted Aid ID.** You must also enter values in the **App Method** (application method) and **Application Date** fields.

2. The committee members use the Restricted Aid Evaluations page to enter their ratings for each of the criteria for the student.

   View each student's overall rating by the committee and by individual committee members using the Committee Detail page and Evaluator Detail page. You can access both of these pages from links on the Restricted Aid page.

3. After all committee members have evaluated the student, the committee makes a final decision on whether to offer the student the restricted aid and how much to offer the student.

   After the final decision has been made, enter the final decision, the decision date, the amount offered to the student (if appropriate), and any comments on the Restricted Aid page.

4. For students who have been awarded the restricted aid, you must manually enter the restricted aid award on the award entry pages.

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If departmental employees are entering the restricted aid award, consider providing them with access to the Manual Student Packaging page only.

Related Topics

- Awarding Online
  This section discusses how to:
- Setting Up Restricted Aid
  To set up restricted aid, use the Restricted Aid Table component (RESTRCTD_AID_SETUP).

Pages Used to Award Restricted Aid

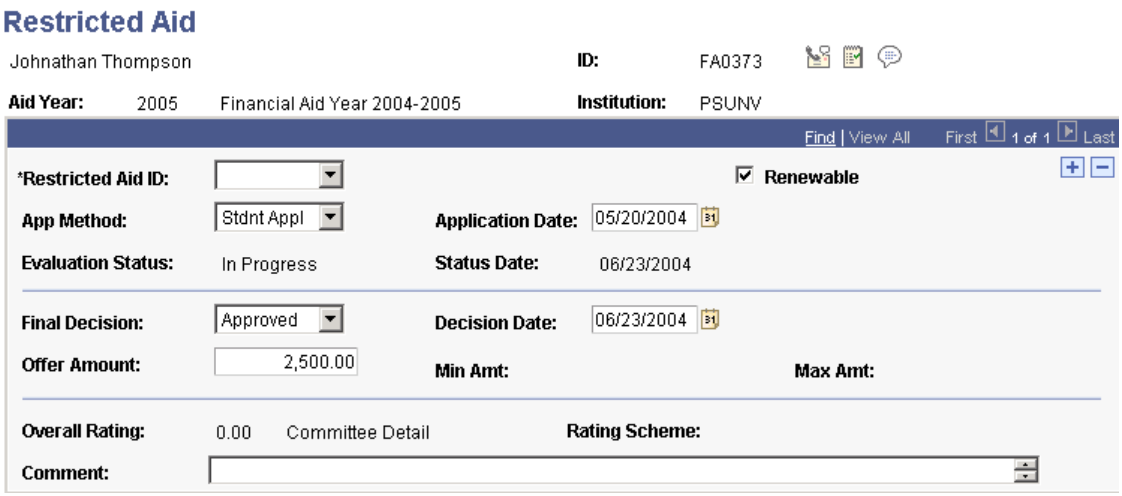
Page Name	Definition Name	Navigation	Usage
Restricted Aid	STDNT_RSTRC_AID1	**Financial Aid**, and then **Awards**, and then **Restricted Aid**, and then **Make Award**, and then **Restricted Aid**	Enter or view information about the student's application for a restricted aid award.
Committee Detail	STDNT_RSTRC_AID2	Click **Committee Detail** on the Restricted Aid page.	Enter committee comments, view details about the committee, and review the committee's comments.
Evaluator Detail	STDNT_RSTRC_AID3	Click the **Member Detail** link on the Committee Detail page.	Enter committee member comments on the student. View each committee member's overall rating for the student as well as information about the committee member.
Restricted Aid Evaluations	STDNT_RSTRC_AID4	**Financial Aid**, and then **Awards**, and then **Restricted Aid**, and then **Evaluate Ratings**, and then **Restricted Aid Evaluations**	Enter ratings from each member of a restricted aid evaluation committee.

Entering a Student's Restricted Aid

Access the Restricted Aid page (**Financial Aid**, and then **Awards**, and then **Restricted Aid**, and then **Make Award**, and then **Restricted Aid**).

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

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Use the information on this page when you enter the restricted aid award for the student on the Student Aid Package page or Manual Student Packaging page.

Complete the following fields—from the top section of the page—at the time that a student applies for a restricted aid award.

Field or Control	Description
Restricted Aid ID	Select the award for which you are considering the student. The values are the restricted aid awards you set up on the Restricted Aid Table component.
Renewable	Select to indicate that a student can renew this restricted aid award from year to year. The system automatically selects the check box based on the information that you used when you set up the restricted aid award, but you can change it on this page.
App Method (application method)	Indicate how the student applies for the award. *External:* The evaluation process is external to the institution, such as an award from a community group. *Met Crit* (met criteria): The student meets certain criteria and therefore becomes eligible for evaluation. For example, students may be eligible for an honors scholarship from a department if the students have a GPA of 3.75 or more. A student who meets the GPA criteria is then considered for the award. *Referral:* The student was referred for consideration for the award. *Stdnt Appl* (student applied): The student submits an application for the restricted aid award.
Application Date	Enter the date that the student submitted heir application or the date that you identified the student as a possible recipient for the restricted aid, depending on the application method.

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Field or Control	Description
Evaluation Status and **Status Date**	Displays the current status of the restricted aid evaluation process for the student, as of the displayed date. *In Progress:* This is the default value. It indicates that one or more committee members are still evaluating the student. *Complete:* All committee members have completed their review of the student, and changed their status to *Complete* on the Restricted Aid Evaluations page.

After the student has been evaluated, complete the rest of the page with information about the final decision.

Field or Control	Description
Final Decision	The final decision made by the restricted aid award committee for the student. *Alternate:* The student is an alternate for the restricted aid award. *Approved:* The student is approved to receive the restricted aid award. *Denied:* The student does not receive the restricted aid award. *Eligible:* The student is eligible for the restricted aid award, and there may be other criteria that the student must pass before receiving the restricted aid award. *See Note:* Additional explanation regarding the final decision is provided in the **Comments** field at the bottom of the page.
Decision Date	The date that you enter the final decision. This field is automatically populated with the current date, but you can override this date.
Offer Amount	Enter an amount, within the minimum/maximum range, that the student is to receive for the restricted aid award.
Min Amt (minimum amount)	The lowest amount that you can award for this restricted aid award. The value that you set up on the Restricted Aid Detail 2 page appears by default.
Max Amt (maximum amount)	The highest amount that you can award for this restricted aid award. The value that you set up on the Restricted Aid Detail 2 page appears by default.
Overall Rating	The average of the member rating values for each member of the committee. The **Member Rating** field can be viewed on the Restricted Aid Evaluations page and is calculated by averaging the value of the components that are used in the evaluation process. This field does not display a value until the evaluation status for each member of the committee is *Complete*.

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Field or Control	Description
Committee Detail	Click this link to access the Committee Detail page and view details about the committee and review the committee's comments.
Rating Scheme	The review process used to evaluate the student. The value you set up on the Restricted Aid Detail 2 page appears by default.
Comment	Enter additional information or explain a final decision of *See Note*.

Entering Committee Comments

Access the Committee Detail page (click the **Committee Detail** link on the Restricted Aid page).

Field or Control	Description
Committee	The name of the committee that reviews this restricted aid award. If more than one committee reviews this restricted aid award, use the scroll arrows to view other committees.
Committee Type	Identifies the purpose of the committee. This is established when the committee is created and is display only information on this page.
Evaluation Status	The current status of the student's evaluation for this restricted aid award. All committee members must have an evaluation status of *Complete* before an overall rating can be calculated for the student.
Status Date	The date when the displayed evaluation status became effective.
Committee Rating	The student's rating for this restricted aid award, which is the average of the ratings of all the committee members.
Member Detail	Click this link to access the Evaluator Detail page and view each committee member's overall rating for the student as well as information about the committee member. You can also enter any comments from the committee member about the student.
Committee Comments	Enter any comments that the committee wants to make about the awarding of this restricted aid to the student. This field is informational only.

Entering Committee Member Comments

Access the Evaluator Detail page (click the **Member Detail** link on the Committee Detail page).

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Field or Control	Description
Evaluator ID	Displays the ID of the committee member whose information is displayed. Use the scroll arrows to view information from other committee members.
Role	The role that the committee member fulfills on this committee. For example, the individual could be the chair, a staff member, or a student member.
Evaluation Status and **Status Date**	The current status of the member's evaluation of the student for this restricted aid award and the date that the displayed evaluation status became effective.
Member Rating	The average of the numerical ratings assigned to each of the components evaluated by the committee, as entered on the Restricted Aid Evaluations page. The committee should determine what values to use for its rating scheme.
Comment	Any overall comments this committee member has about the student. You enter the member's comments on this page, not the Restricted Aid Evaluations page.

Evaluating a Student's Restricted Aid

Access the Restricted Aid Evaluations page (**Financial Aid**, and then **Awards**, and then **Restricted Aid**, and then **Evaluate Ratings**, and then **Restricted Aid Evaluations**).

This page can be used by committee members or an administrative assistant to enter information, and then can be viewed by others who might need to review the information.

Rating information and comments can be added for each component that is evaluated. For example, the committee might review an essay, extracurricular activities, and the student's GPA to decide if the restricted aid should be awarded to the student. The essay, extracurricular activities, and GPA are all components.

Field or Control	Description
Rating Scheme	The review process used to evaluate the student. The value that you set up on the Restricted Aid Detail 2 page appears by default.
Member Rating	Displays the calculated average of the values assigned to all components. For example, if three components are to be evaluated, the values entered for each component are added together and divided by three. If one of the three values is zero, the total is still be divided by three.

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Field or Control	Description
Evaluation Status	Indicates the current status of this committee member's evaluation of the student. *In Progress:* This is the default value. It indicates that the committee member is still evaluating the student. *Complete:* The committee member has completed his or her review of the student.
Component	Indicates what is being evaluated, such as an essay, the student's extracurricular activities, or a letter of recommendation. Components are translate values that are set up in PeopleSoft Recruiting and Admissions.
Type	Indicates whether the component considers only one factor or is based on several components. Component types are useful for informational and reporting purposes. *Individual:* The component is an individual component—it considers only one factor, whether that is an essay, interview, or extracurricular activities. *Cumulative:* The component is made up of other components, such as an overall rating.
Value	Enter the numeric rating value that the member wants to assign to the Component.
Rating Comments	Enter any comments about the rating, if appropriate.

Related Topics

- Recruiting and Admissions: Setting up Applicant Evaluation
- Recruiting and Admissions: Setting Up Student Response

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28

Awarding and Packaging Students

Understanding Awarding and Packaging Students

> **Important**
>
> Mass Change is a deprecated product. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

This section discusses early decision awarding, review of information relevant to awarding, awarding and packaging financial aid, award notification, and award updating.

The terms *awarding* and *packaging* are often used interchangeably. In Awarding and Packaging documentation, *Awarding* refers to manually offering one financial aid item type (award) at a time to a student. *Packaging* refers to awarding multiple awards at one time to create a financial aid award package for a student.

Early financial aid offers are made to students using award categories instead of specific awards. Award categories give "early decision" students an idea of the types of financial aid that they might receive without committing to exact awards. You define these award categories for your institution. For example, you might have categories for loans, scholarships, work-study, and grants. For awarding actual financial aid monies to the student, you use specific financial aid item types using one of the methods of awarding or packaging.

Before selecting awards for students, you review information on aggregate aid limits, restricted aid awards, and the student's status in the financial aid cycle. You can view aggregate aid information by aggregate area, such as Perkins or Stafford. If your institution uses the National Student Loan Data System (NSLDS) totals for the federal Stafford subsidized, unsubsidized, Perkins, Pell, and Student Education Opportunity Grant (SEOG) programs, ensure that NSLDS data has been loaded and pushed to the aggregate tables for direct use by the Awarding and Packaging processes. NSLDS totals are pushed to a specific aid year and you can override them on the Incoming Aggregate Aid component. You can also view a summary of aggregate aid for a student or look at aggregate information by institution.

Beginning with aid year 2026, Campus Solutions (CS) incorporates regulatory updates introduced by the One Big Beautiful Bill (OB3) that affect how CS evaluates loan eligibility and aggregate limits during awarding and packaging. CS evaluates loan aggregates using one of two frameworks:

- Legacy (pre-OB3): applies to students who are identified as grandfathered and remain eligible under prior loan limits.
- OB3: applies to students who are subject to updated federal borrowing limits.

CS determines which framework to apply based on values defined on the Financial Aid Term record. These fields control aggregate evaluation:

- **OB3 Legacy Student**: indicates whether CS uses legacy or OB3 loan limits.

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- **OB3 Professional Classification**: identifies whether the student's program is classified as professional.
- **OB3 Use Professional Lifetime**: indicates whether a graduate student should use professional lifetime loan limits.

Using these field values, CS applies aggregate limits based on the student's academic level:

- Undergraduate students are evaluated using undergraduate limits. Dependent and independent limits are applied as appropriate.
- Graduate students are evaluated using graduate limits, unless CS is configured to use professional lifetime limits.
- Professional students are evaluated using professional limits, which are separate from graduate limits under OB3.

OB3 also introduces changes to specific loan programs:

- Parent PLUS loans are subject to annual and lifetime limits. CS tracks Parent PLUS amounts separately from student loan aggregates. Parent PLUS borrowing does not count toward the student's federal lifetime loan limits.
- Graduate PLUS loans are not available for new borrowers. CS allows these loans only for students who are identified as legacy.

CS derives aggregate limits and behavior from setup defined in the Financial Aid application. Institutions must review and update setup to support OB3 processing, including:

- Aggregate level definitions on the Aggregate Level Cross-Reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Level Translation**, and then **Aggregate Level Cross-Reference**)
- Aggregate limits on the Aggregate Aid Limits page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Aid Limits**, and then **Aggregate Aid Limit**)
- Aggregate program configuration on the Aggregate Program page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Programs**, and then **Aggregate Program**)
- Aggregate area mappings on the Aggregate Area-NSLDS Cross Reference page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Aggregate Area Translation**, and then **Aggregate Area-NSLDS Cross Reference**)

When institutions configure these setup components correctly, CS calculates awards using the correct aggregate limits and complies with OB3 requirements.

You can use inquiry pages to monitor a process that awards restricted aid to students. Graduate departments that award merit-based aid might use the Restricted Aid pages. These pages provide information on the progress of the restricted aid awarding cycle; committee members can enter their final decisions, including the restricted aid award amount. This information can then be used to enter the restricted aid award for a student.

The Packaging Status Summary page contains information about a student's status in the financial aid cycle, such as financial aid application status, institutional or federal verification status, Satisfactory Academic Progress (SAP) status, and information related to packaging a student. You can use this page to prevent the Awarding process from continuing if certain parameters are established. For example, you might only award federal awards if the student is meeting SAP. To change a value on the Packaging Status Summary page for a group of students, use Mass Change.

The Packaging Status Summary page has links to other pages where you can review or sometimes modify a student's information. These linked pages contain Financial Aid Term (FA

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Term) summary information, ISIR data, database match information, the student's financial need calculated with federal and institutional methodology (FM and IM), Pell processing information, Pell eligibility calculation overrides, restricted aid information, and the current financial aid award package information.

After reviewing information, you can award and package students for financial aid manually or in one of three automated ways:

- Manual Awarding is done online, one student at a time, entering awards one by one.
- Auto Packaging is done online at the student level and uses a packaging plan, a set of institutionally defined rules for awarding.

  After Auto Packaging generates a financial aid award package for the student, you can make any manual changes to awards in the package before saving the information.
- Mass Packaging is a background process for packaging groups of students using one or more packaging plans.

  You select your student population, using either a query definition, an equation, or an external file of students. Then the system assigns a packaging plan to each student based on the processing order and selection criteria associated with each plan. Finally, you initiate the actual Mass Packaging routine, which packages the students based on their assigned packaging plans. After each step in the process, you can further define your targeted population by removing individual students from the selection or packaging plan assignment process.
- Auto Select Packaging mimics Mass Packaging selection as the system evaluates both the Selection Criteria and the Processing Order for each packaging plan, and assigns a packaging plan to an individual student.

  You can manually update the package before saving, validating, and posting.

Auto Packaging, Auto Select Packaging, and Mass Packaging use packaging plans to generate award packages that appear on the same page you use for manual awarding. Packaging plans use rules predefined by the United States Education Department (USED), your institution, or both. You can manually modify any generated award package.

After packaging, a validation process verifies that all federal eligibility rules, aggregate aid limits, fiscal fund balances and rules, award rules and limits, and packaging plan rules are met. For automated processing, this is part of the final step when the award package is given to a student. For manual awarding, you click the **Validate** button to initiate the validation process.

After validation, use a financial aid award notification (FAN) to notify students of their award packages. To do so, you assign a communication to a student and use your choice of mail merge software. If awards change for a student, you send multiple FAN letters.

If a student declines the financial aid offered or declines a category of aid, such as loans, you can use mass actions to accept, cancel, or decline all or specific categories of aid.

Throughout the aid year, you can view summary information regarding the student's awards and the disbursement of those awards.

Related Topics

- Defining Packaging Plans
  This section provides an overview of packaging plans setup and discusses how to:

Prerequisites

Although you can award students manually, the most efficient way to package financial aid awards is with Auto Packaging, Auto Select Packaging, Mass Packaging, or a combination of

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these three. You are encouraged to set up the parameters needed for Auto Packaging and Mass Packaging to take full advantage of the Financial Aid system.

For manual awarding—assigning individual awards to students, one student at a time—you must set up your defaults (installation defaults and aid processing rule sets), financial aid item types, aggregate aid limits, disbursement plans and disbursement split codes, award adjustment reasons, and award messages for FAN letters.

Related Topics

- Using Equation Engine in Packaging
  Equation Engine can read any table for which you have security access and can perform various arithmetic operations and external call subroutines.
- Creating Equity Item Type Groups
  To set up equity item type groups, use the Packaging Equity Item Type component (PKG_EQUITY_GROUP).
- Creating Related Item Type Groups
  This section provides an overview of related item type groups and discusses how to define related item type groups.
- Defining Packaging Plans
  This section provides an overview of packaging plans setup and discusses how to:
- Establishing Defaults
  To set up defaults for Classic and Fluid interfaces, use the Installation Defaults (INSTALLATION_FA) and Aid Processing Rule Setup (FA_DFLT_RULE_SET) components.
- Defining Financial Aid Item Types
  To set up financial aid item types, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM).
- Setting Up Aggregate Aid
  To set up aggregate aid, use the Aggregate Level Translation component (AGGR_LVL_XREF), the Aggregate Programs component (AGGR_PROG_TABLE), the Aggregate Aid Limits component (AGGR_AID_TBL), the Aggregate Area Translation component (SFA_AGGR_AREA_XREF), and the Aggregate Area for Institution component (SFA_NSLDS_AGG_INST).
- Defining Disbursement Plans and Split Codes
  To set up disbursement plans and split codes, use the Disbursement Plan Table component (DISBURSE_PLAN_TBL), the Disbursement ID Table component (DISBURSE_ID_TBL), the Disbursement Split Code component (DISB_SPLIT_CD), and the Disbursement Split Cd Formula component (DISB_ID_SPLIT).
- Setting Up Award Messages
- Preparing for Early Financial Aid Offers
  To set up early financial aid categories, use the Early Financial Aid Categories component (ERLY_FA_CTG_TBL).

Understanding Manual Awarding, Auto Packaging, and Auto Select Packaging

The Award Entry component is used for manual awarding, Auto Packaging, and Auto Select Packaging. Use the Student Aid Package page for online manual awarding and Auto Packaging. View how each award affects unmet need and total aid amounts on the Need

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Summary page. Totals are updated on the Need Summary page after Validation. View the student's Financial Aid Term and term budget information on the Term Summary page.

Note boxes below field descriptions offer tips and directions for entering Pell Grants. If you set the award offer amount to zero dollars, the system calculates Pell Grants when Validation is run.

This section discusses:

- Online manual awarding.
- Auto Packaging.
- Auto Select Packaging.
- Need summary.
- Need summary validation.

Related Topics

- Awarding Pell Grants for the 2022-2023 and 2023-2024 Aid Years
  This section provides an overview of Pell Grant awarding and discusses how to:

Online Manual Awarding

To award manually, populate the tabs on the Student Aid Package page and insert additional rows of awards as needed. To have the Validation process populate the offered amount for an award, leave the **Offered** field at zero and validate the award. For example, to determine the correct Pell Grant amount for a student, enter the Pell Grant financial aid item type, leave the offer amount at zero, and click the **Validate** button; the Pell Grant amount is calculated based on the student's eligibility and institutional rules and returned to the page with the scheduled disbursements.

After you enter all the awards for a student, run the Validation process before posting the awards to the award tables. Validation checks that the student is eligible for the awards and that no packaging rules have been violated. Validation includes edits for minimum and maximum award limits, aggregate limits, fiscal fund availability, federal eligibility, and financial aid item type rules. Validation can reduce an award amount or set an award amount to zero to comply with rules and limits. Validation must be successful before you can run the Posting routine, the final step for manually awarding students.

You can combine manual awarding with Auto Packaging. If you do not want a manually entered award to be discarded during Auto Packaging, select the **Lock** check box. Auto Packaging discards all unlocked awards, and these same financial aid item types can be re-awarded if the award is included in the packaging plan. However, for awards of a financial aid item type that have disbursement protection activated and have been at least partially disbursed, Auto Packaging preserves these awards but reduces the award amount to the amount that has been disbursed. Also, when the Packaging routine processes awards in active/passive mode (such as multicareer packaging, multiple award period processing, or Pell-only repackaging), Auto Packaging does not cancel awards processed in passive mode.

Auto Packaging

Auto Packaging assigns awards to a student based on the rules of the selected packaging plan so your packaging plans must be established before you can use the Student Aid Package page for Auto Packaging. Auto Packaging can be combined with manual awarding by changing the awards entered by the packaging plan or adding additional awards.

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Auto Packaging assigns awards and validates the awards all at once. Validation checks that the student is eligible for the awards given and that no packaging or financial aid item type rules have been violated. Validation includes edits for minimum and maximum award limits, aggregate limits, fiscal fund availability, federal eligibility, and financial aid item type rules. Validation can reduce an award amount or set an award amount to zero to comply with rules and limits. If you make no changes to the awards after Auto Packaging, you can post the awards to the award tables directly. If you make manual changes to any awards after Auto Packaging, you click the **Validate** button to ensure the student is still eligible for the changed or new awards.

Warning

If you repackage locked or disbursed awards using Auto Packaging, post that set of awards (click the **Post** button) *before performing any validation activity* (click the **Validate** button). That is, if you use Auto Packaging to repackage a student who has locked awards, disbursed awards, or both, click the **Post** button first. Do not click the **Validate** button immediately after Auto Packaging. If you manually change an Auto-Packaged set of awards, post before validating. If you click the **Validate** button before posting a set of awards that was returned from Auto Packaging, it can potentially compromise the synchronization between offer and accept amounts as well as produce a different award than anticipated.

Note

If the student does not have locked or disbursed awards, you can repackage that student using Auto Packaging and then manually change the awards or validate without posting first.

Auto Select Packaging

Auto Select Packaging selects the packaging plan for an individual student and career by using the selection criteria (equation) and processing order associated with your packaging plans. This is the same selection criteria and processing order used by Mass Packaging.

When you leave the **Packaging Plan ID** field blank and click the **Retrieve** button, the system evaluates the Packaging Plan table sequentially and assigns the first packaging plan for which the student qualifies. The system next packages a set of eligible awards according to the packaging rules defined on the packaging plan.

Note

Before using Auto Select Packaging, ensure that your processing order is correctly set in your Packaging Plan table.

Related Topics

- Performing Mass Packaging Using Application Data
  This section discusses how to:

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Need Summary

The Need Summary page displays the student's Cost of Attendance (COA), Pell COA, Alternate Pell COA, Expected Family Contribution (EFC)/Student Aid Index (SAI), federal and institutional need, federal and institutional award totals, need-based aid award totals, federal methodology (FM) and institutional methodology (IM) special need/cost aid award totals, unmet need, and unmet COA.

The Need Summary page displays the SAI/prorated FM EFC and prorated IM EFC values for a student used to determine the student's need. When using different application data sources for packaging, it is important to understand how the SAI/FM EFC/IM EFC and need are affected by different packaging data source selections. For example:

Scenario 1: When the packaging data source on the Financial Aid Defaults page equals *Fed Only, Fed, Inst,* or *Inst, Fed* and only federal data exists for the student, if you award a financial aid item type with an institutional packaging methodology, the financial aid item type is awarded based on the institutional need. But, if you do not have institutional application data and analysis, institutional need equals institutional COA, because the institutional EFC is 0.00 USD. The Packaging routine awards institutional financial aid item types up to the institutional COA.

Scenario 2: When the packaging data source on the Financial Aid Defaults page equals *Inst Only, Fed, Inst,* or *Inst, Fed* and only institutional data exists for the student, if you award a financial aid item type with a federal packaging methodology, the financial aid item type is awarded based on the federal need. But if you do not have federal application data and analysis, federal need equals federal COA, because the SAI/FM EFC is 0.00 USD. The Packaging routine awards federal financial aid item types up to the federal COA.

If your institution uses IM for early awarding—in October, as an example—and you want to include estimated federal awards, set the **Packaging Methodology** field on the FA Item Type 2 page for your federal financial aid item types to *Institutional Methodology.* This allows the Packaging processes to use the same need calculation for all the awards; because you have only institutional data you use institutional need. When the federal aid year begins on January 1, you *must* change the **Packaging Methodology** field back to *Federal* for all your federal financial aid item types. You must also make sure that the student has application data compatible with the packaging data source you indicated on the Financial Aid Defaults page.

Related Topics

- Defining Awarding and Rounding Rules
  Access the FA Item Type 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**).
- Defining Installation Level Defaults

Need Summary Validation

Sometimes a manual change to the student's budget does not automatically propagate to the need summary totals. In this case, if you create selection criteria that rely on need-related elements, such as Unmet Need, Overaward Need, Unmet COA, or Overaward COA, the system is not using the most current calculated values.

Run the Need Summary Validation process before performing online packaging (manual, Auto, or Auto Select), Mass Packaging, online Repackaging (manual, Auto, or Auto Select), or batch Repackaging. This ensures that need-related elements, which may be part of your selection equation or PS Query, are updated and reflect the most recent changes to COA. You can run

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the batch Need Summary Validation process at any time. After you run it on your population, you do not need to run it again unless you make budget changes to several students using the Student Budget Maintenance component. To make a single change online, use the **Update Need Summary** button on the Student Budget Maintenance page (STDNT_TERM_BUDGET).

Related Topics

- Running the Need Summary Validation Process
  This section discusses how to select students for Need Summary Validation.

Understanding Mass Packaging

Using Mass Packaging, you can award financial aid for groups of students. A Mass Packaging definition can identify the group of students being selected for Mass Packaging. You can then associate one or more packaging plans with that population. You can evaluate your selected population and the packaging plan associated with each student before Mass Packaging takes place. The system selects the optimum packaging plan for each student based on the combination of your packaging equations and the processing order of the packaging plan. Then the system applies the packaging plan against those selected students, awarding each student based on the defined packaging plan rules.

Three processes are run as part of Mass Packaging. The first process selects students to be included for Mass Packaging evaluation. The second process assigns packaging plans to students. The third process reviews the student's eligibility, the program rules, and other eligibility criteria and then awards financial aid to students using the assigned packaging plans. After the first two processes, you can review the students being selected and the assigned packaging plans. You can also review the order in which the students are packaged, again by packaging plan. Finally, you can delete unwanted students. You can run the third process in live mode or in simulation mode to review expected packaging results. Mass Packaging refers to this three-step process. The Mass Packaging process is the third step in Mass Packaging.

Before using Mass Packaging, consider the results that you want the system to produce according to your institution's packaging philosophies. Determine the student attributes to use in the packaging equations to select the correct students for each packaging plan. Review the criteria each packaging plan uses to select students. If some of the selected students cannot be matched to any of your packaging plans, review the list of these students to determine why the they did not get matched. Adjust your equations to ensure that these students are assigned correctly.

> **Note**
>
> Your packaging plans must be completely established before you begin Mass Packaging. After you start Mass Packaging, do not make any changes to your packaging plans until you have run all three processes. If you make changes to your packaging plans, rerun the Mass Packaging processes starting with the selection process. Changing packaging plans after students have been selected or assigned to packaging plans may produce incorrect or undesirable results during the Mass Packaging process.

Related Topics

- Defining Packaging Plans
  This section provides an overview of packaging plans setup and discusses how to:

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Awarding Online

This section discusses how to:

- View need summary information.
- View term summary information.
- Use Auto Packaging and Auto Select Packaging.
- View award disbursement detail.
- Document award adjustments.
- Award students manually.
- Use professional judgement.

Pages Used to Award Online

Page Name	Definition Name	Navigation	Usage
Need Summary	STDNT_AWARD_NEED	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Need Summary**	View need summary information for a student.
Term Summary	STDNT_TERMDATA_SUM	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Term Summary**	View budget and Financial Aid term information by term. Each term has a distinct career tied to it.
Student Aid Package	STDNT_AWARD_ENTRY3	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Student Aid Package**	Use this page for manual, auto, or auto select packaging. Auto Packaging and Auto Select Packaging can be combined with manual awarding in the same awarding session.
Award Disbursement Detail	STDNT_PKG_DISB_SEC	Click the**Disbursement** link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	View award disbursement ID detail as well as create custom split amounts and customize loan fee amounts.
Packaging Message	PKG_MESSAGE_SEC	Click the **Message** link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	View the reason why a particular financial aid item type failed or was reduced by validation or Auto Packaging.

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Page Name	Definition Name	Navigation	Usage
Award Adjustment	AWARD_ADJUST_SEC2	Click the **Reason** link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	Document award adjustments by assigning an award adjustment reason to any adjusted award Action.
Manual Student Packaging	STDNT_AWARD_ENTRY 5	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Departmental Awards**, and then **Manual Student Packaging**	Award students manually. Prohibits the use of auto packaging.
Professional Judgement	STDNT_AWARD_ENTRY 4	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Invoke Professional Judgement**, and then **Professional Judgement**	Use professional judgement to override all rules (including federal and aggregate rules) except for fiscal limits when awarding financial aid. Award students without a budget. All item types awarded from this component are set to locked.

Viewing Need Summary Information

Access the Need Summary page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Need Summary**).

Field or Control	Description
Award Period	View the different award periods *(Academic* or *Non-Standard)* by using the scroll arrows.
EFC Status (expected family contribution status)	For the 2023-2024 and prior Aid Years, displays the status of the prorated EFC: *Official, Rejected,* or *Unofficial.*
SAI Status (expected family contribution/ student aid index status)	For the 2024-2025 and future Aid Years, displays the status of the 9-month SAI: *Official, Rejected, Unofficial,* and *Provisional Independent.*
Federal Year COA (federal year cost of attendance) and **Institutional Year COA** (institutional year cost of attendance)	The federal or institutional COA for the award period.

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Field or Control	Description
Prorated EFC (prorated expected family contribution), **SAI** (student aid index) and **Institutional EFC** (institutional expected family contribution)	For the 2023-2024 and prior Aid Years, the **Prorated EFC** is the EFC adjusted for the number of months from the Budget Duration on the FM (Prorated) entered on the Global and Federal Options page. For the 2024-2025 and future Aid Years, the **SAI** is the 9-month contribution. The **Institutional EFC** is the EFC adjusted for the number of months from the Budget Duration on the IM (institutional methodology) extension record entered on the IM Value Parms 1 page.
Federal Need and **Institutional Need**	The federal or institutional COA minus the EFC/SAI. This is the student's financial aid need.
Montgomery GI Bill/AmeriCorps	Displays the amount you entered on the Veteran's Education Benefits page. The same amount is entered in the federal and institutional columns.
Federal Need Based Aid and **Institutional Need Based Aid**	The amount of need-based aid awarded to the student. This is determined by the Meet Need/Cost attribute of the financial aid item type.
Special Need/Cost Aid (FED) (special need/cost aid federal) and **Special Need/Cost Aid (Inst)** (special need/cost aid institutional)	The amount of special need/cost aid awarded to the student. This is determined by the Meet Need/Cost attribute of the financial aid item type. Special need/cost aid always reduces the student's need first, then replaces the student's EFC/SAI.
Total Federal Aid and **Total Institutional Aid**	The total amount of aid awarded for federal and institutional calculations. This is N/B Aid plus Special Need/Cost Aid.
Federal Unmet Need and **Institutional Unmet Need**	The Fed/Inst Need minus Total Aid.
Federal Unmet COA (federal unmet cost of attendance) and **Unmet COA (INSTL)** (unmet cost of attendance institutional	This is the Fed/Inst Year COA minus Total Aid.
Pell Year COA (Pell year cost of attendance)	The student's COA calculated by adding up the budget items that have an associated Pell category. This COA is used when calculating Pell Grants using the Regular Federal Pell Grant Schedule.
Alternate Pell COA (alternate Pell cost of attendance)	The COA used when determining if a student's Pell award should be calculated using the Alternate Pell Grant Award Schedule. This COA is calculated by adding up budget items that have associated Pell categories of *Tuition, Child Care,* and *Disability.*
Less than Half Time Pell COA (less than half-time Pell cost of attendance)	Displays the Pell less than half-time amount. The system determines which Pell annual COA to use when calculating each term Pell award. If the term enrollment is less than half time, the system uses the less than half-time Pell annual COA to determine the Pell award.

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Viewing Term Summary Information

Access the Term Summary page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Term Summary**).

The **Term Budget** group box displays the term and the corresponding career. Use the scroll arrows to see each term within the aid year. The following fields are also displayed.

Field or Control	Description
Dependency Status	Indicates whether the student is a dependent or independent student.
Academic Level	The student's academic level for the term and career. Academic level comes from the Financial Aid Term data.
Financial Aid Load	The financial aid load for the term and career shown. Financial aid load can be full-time, 3/4-time, half-time, and less than half-time.
Housing	Displays the housing option specified by the student; like on campus or off campus.
Residency	Displays whether a student is considered a state resident or not. This value comes from the residency data in personal data.
Institutional Term COA (institutional term cost of attendance)	This is the term-based institutional cost of attendance by career.
Federal Term COA (federal term cost of attendance)	This is the term-based federal cost of attendance by career.
Total Aid	This is the total of all disbursements for all awards within the given term. This value is derived by adding all the disbursements for different awards that fall in the same term.

The **FA Term Data** group box displays data for the term from the Financial Aid Term component. Use the scroll arrows to see each term within the aid year.

Related Topics

- Building a Financial Aid Term
  Access the FA Term page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **FA Term**).

Using Auto Packaging and Auto Select Packaging

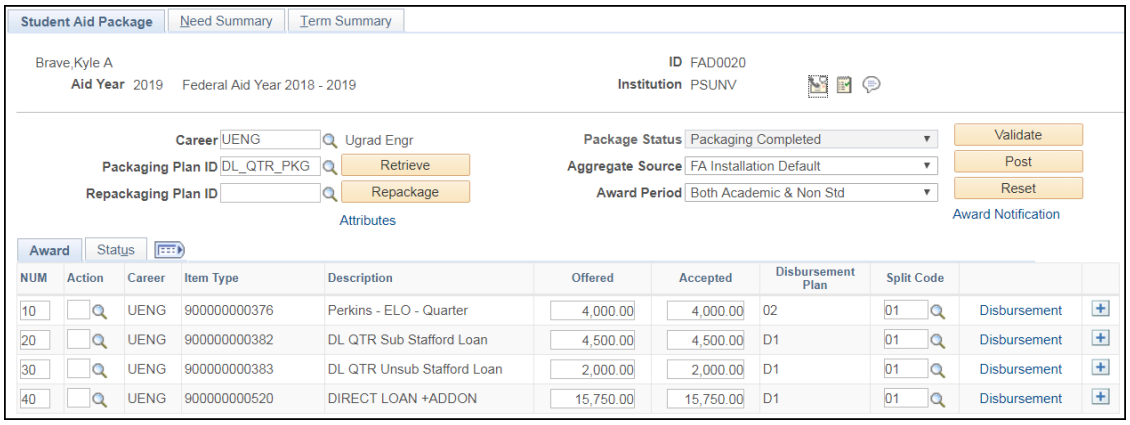
Use the Student Aid Package page for Auto Packaging and Auto Select Packaging individual students. You select the packaging plan for Auto Packaging and the system selects the packaging plan for Auto Select Packaging:

- For Auto Packaging, select the packaging plan in the **Packaging Plan ID** field and then click the **Retrieve** button.
- For Auto-Select Packaging, leave the **Packaging Plan ID** field blank and click the **Retrieve** button. Using the processing order and selection criteria (equation) associated with packaging plan in the Packaging Plan table, the system evaluates each plan and selects the first plan for which the student meets the selection criteria.

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Access the Student Aid Package page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Student Aid Package**).

This example illustrates the fields and controls on the Student Aid Package page: Award tab. You can find definitions for the fields and controls later on this page.



> **Note**
>
> Click the tabs in the scroll area to access multiple views of this page. Fields common to both Award and Status views are documented first.

Common Page Information

Field or Control	Description
Career	The active career for the student to be used for packaging at this time. If the student has only one career, it is defaulted into the field. Choose from among the current valid careers for the student—defined on the Financial Aid Term record, which you can change on the FA Term page—and careers for which the student has received any financial aid awards. After you select a career, do not change this field until after you click the **Post** button or the **Reset** button. This prevents you from changing awards for more than one career at a time. Only the packaging plans and disbursement plans associated with the active career are available during this awarding session. **Note:** If the student has only one career for the aid year, that career defaults into the **Career** field and you do not need to select a career.
Packaging Plan ID	The packaging plan you want to use to package the student. Only packaging plan IDs that match the student's career are available.

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Field or Control	Description
Retrieve	Click to run Auto Packaging or Auto Select Packaging. The awards associated with the packaging plan appear in the Award and Status tabs. If a student is not eligible for an award in the packaging plan, the award amount is set to zero, and a **Message** link displays. If nonzero awards are returned, a disbursement link displays the scheduled disbursements for the award. Awards that are not locked on the Student Aid Package page are canceled when Auto Packaging is performed, with the exception of already disbursed awards of a financial aid item type that has disbursement protection activated. **Note:** When you click the **Retrieve** button, you can receive the following error message: *The assignment to the specified field failed.* This indicates that one of the student's award amounts exceeds the size of the **Offered** and **Accepted** fields. This error can occur when the student receives the term limit maximum 999,999.00 USD for multiple terms in an aid year. The resulting award amount (if two terms exist, 999.998.00 USD) is larger than the field.
Attributes	Click this link to access User Variables set up using the Common Attribute Framework. The Common Attribute Framework enables you to define a common attribute and add the common attribute as a data field to any Campus Solutions page. A user can then enter a value on the page for the data field. Use the Common Attribute Framework to create attributes for the Student Awards feature. Create attributes using the Common Attribute component (Set Up SACR, Common Definitions, Common Attributes Setup, Common Attribute) and then use the Record Context component (Set Up SACR, Common Definitions, Common Attributes Setup, Record Context) to associate attributes with the STDNT_AWARDS record. See: • Campus Community Fundamentals: Defining a Common Attribute • Campus Community Fundamentals: Associating a Common Attribute to a Record

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Field or Control	Description
Package Status	This field is known as the **Aid Processing Status** field on the Packaging Status Summary page **(Financial Aid**, and then **View Packaging Status Summary).** Various financial aid processes automatically update the packaging status. You can manually change the package status after award posting, and you must save your change before exiting the page. You can use the package status to set the packaging status to a value other than *Completed* after you have posted an award. For example, if a department award is manually awarded and then you want to use Mass Packaging, you would want to set the package status from *Completed* back to *Package.* *Applied:* The student has applied for financial aid. This value is automatically populated when you load a financial aid application such as an ISIR or a PROFILE application. *No App Rcd* (No Electronic Application Received): No electronic application has been received. *Completed* (Packaging Completed): The student's award package has been posted. The Posting routine automatically updates the field to this value. *Review* (Ready for Counselor Review): The student should be or is currently being reviewed by a financial aid counselor. *Package* (Ready for Packaging): The student is ready for packaging. *Repackage:* The student is ready for repackaging. Can be set by the External Award Load process.

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Field or Control	Description
Aggregate Source	This field enables you to set the aggregate source to assess a student's lifetime aggregate aid history during the Awarding and Packaging process. You can set the aggregate source at the financial aid installation default level and on the Packaging Status Summary in addition to each of the award page components. *Default:* Directs awarding and packaging to use the **Aggregate Source** value set at the FA Installation level. *NSLDS:* Directs the awarding and packaging to use NSLDS aggregate totals that have been loaded and pushed into the aggregate tables. *PS:* Directs awarding and packaging to use aggregate undergraduate and graduate totals that have been completely maintained by the institution and Financial Aid packaging process. **Note:** An **Aggregate Used** field is also provided on the Packaging Status Summary page. **Aggregate Used** captures the exact aggregate source used in the most recent awarding or packaging for this student.

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Field or Control	Description
Award Period	Provides the Packaging routine with the intended award period processing mode for the award period that you are currently packaging. The routine uses this information to determine automatically which existing awards are active or passive. The award period you select functions like the packaging plan award period attribute in the determination of passive/active mode for existing awards. When the Packaging routine employs passive/active mode processing, you can treat the awards in one award period (academic) as passive awards while awarding the other award period (nonstandard). The Packaging routine does not modify or repackage passive awards; it preserves them, unlike active awards that are subject to change. However, the Packaging routine still includes the award amounts of passive awards in determining remaining annual aggregate limits or other eligibility requirements and in updating need summary balances. After you select an award period, the Packaging routine evaluates the disbursement plan/split code pattern for each of the existing posted awards and determines whether the pattern matches or falls within the selected award period mode. The Packaging routine then makes the rows of passive awards unavailable, indicating that these awards cannot be modified by either you or the Packaging routine. All other awards can be modified. After you select the award period for a student, you must complete your activity for the selected award period. Validate and post the awards or click the **Reset** button to clear the results before you can select a new award period for that student. *Both:* You are currently packaging the student for both award periods. This is the default value. The Packaging routine reevaluates all existing awards, processing all awards as active awards. When you select *Both*, all awards are available for reevaluation. *Academic:* You are currently packaging the student for the academic award period (AAP) only. The Packaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the AAP or for both award periods. The Packaging routine processes all other existing awards as passive awards. *Non-Std* (nonstandard): You are currently packaging the student for the nonstandard award period (NSAP) only. The Packaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the NSAP or for both award

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Field or Control	Description
	periods. The Packaging routine processes all other existing awards as passive awards.
Validate	Click this button during manual packaging to have the award package checked by the Validation process after you enter each award or after you enter all awards. During validation, all eligibility rules, aggregate limits, minimum and maximum award limits, fiscal fund availability, and financial aid item type rules are checked. To determine the maximum award limit, the Validation process uses the lowest maximum award limit from the maximum limits set at the item type, financial aid item type, aggregate aid limit, fiscal item type, and packaging plan levels. The Validation process uses the lowest minimum award limit from the minimum limits set at the item type, financial aid item type, and packaging plan levels. The Validation process may cancel an award or lower the award amount to comply with established rules and limits. If validation fails on any award, a **Message** link appears in the award row. Validation may also reduce an award amount or set an award amount to zero. Any awards that are assigned a zero dollar amount when you run Auto Packaging are removed during posting. When you are manually packaging a student, you can have the Validation process populate the correct award amount based on the student's eligibility and institutional rules by entering a zero amount for the award. An award must be successfully validated before you can post the award. During manual packaging, the Validation process does not impose restrictions on offering unsubsidized Stafford loans before you award students their full subsidized Stafford eligibility. You are responsible for offering students their full subsidized Stafford eligibility before offering unsubsidized Stafford loans.

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Field or Control	Description
Post	Click to save the award information and update the student award tables. If any award fails to post, an error message is displayed and none of the awards are posted. If you do not post the student's awards before leaving the page, the awards are not saved. **Note:** If you award two instances of the same item type where one instance of the item type has aggregate levels associated with it and the other instance does not have aggregate levels associated with it, the Award Posting routine returns an error. For federal item types, you must cancel the instance that does not have the aggregate levels associated with it and re-award the instance with associated aggregate levels. For item types that are not designated as federal, any award that has previous matching aggregate level history is rejected if no matching level limit record exists. You also receive this message, "No matching aggregate level limit for a defined aggregate table." You must then correct the error by either eliminating the aggregate history for the level or by reestablishing level limits for that award.
Reset	This button refreshes the page with any previously posted awards and removes any awards that you attempted to make on the page before posting during the awarding session. Posted awards are not removed. Click this button to validate new awards and see what effect the new awards might have toward the existing package before you post them.
Nbr (number)	The sequence number is automatically assigned in increments of ten when awards are entered. Click in the field to modify the sequence number and to change the number. You can control the order of new or existing awards by using a sequence number in between two existing sequenced awards. Duplicate sequence numbers are not permitted. The sequencing of awards is always preserved throughout the packaging session of the student. All awards for the passive careers are sequenced to the top of the packaging sequence. These passive awards are not changed regardless of need or other changes in the student's record.

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Field or Control	Description
Action	Select the action being taken on the award. When initially entering a new award, the values are *B—Offer/Accept, O—Offer,* and *X—Discard.* After an award has been posted, the values are *A—Accept, B—Offer/Accept, C—Cancel, D—Decline,* and *O—Offer*. Any change to an award action is logged in the Award Activity Log, which can be viewed on the Award Activity page. *A—Accept:* Accepts an award that has been offered to the student. If a student wants to accept less than the new offered amount — for an item type that is not a loan — the student can use the action A. *B—Offer/Accept:* Use when you are initially offering an award to a student for which an explicit acceptance from the student is not needed (such as grants, scholarships, and so on). If you select this option and modify the existing award, the system automatically changes the accepted amount to the offered amount of the existing award. If you increase an existing award, the system replaces the accepted amount with the new offered amount. Similarly, the same behavior takes place for reduced awards. *C—Cancel:* Cancels the award, but retains the award entry with a zero amount in the list of awards for that student. If you cancel an award, the award amount is reduced to zero, and the need summary and related award and fiscal pages are updated. *D—Decline:* Declines the award, but retains the award entry with a zero amount in the list of awards for that student. If you decline an award, the award amount is reduced to zero, and the need summary and related award and fiscal pages are updated. *O—Offer:* Offer the award to the student. The accepted amount is zero. *X—Discard:* Deletes the award row when validation is performed if the award has not been posted. For example, you would use this status if you entered an award in error or you decided not to award the student a particular financial aid item type.
Career	This field displays the career for which you made the award. This indicates which career is associated with each award.
Item Type	The financial aid item type ID for the award that you want to award.

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Award Tab

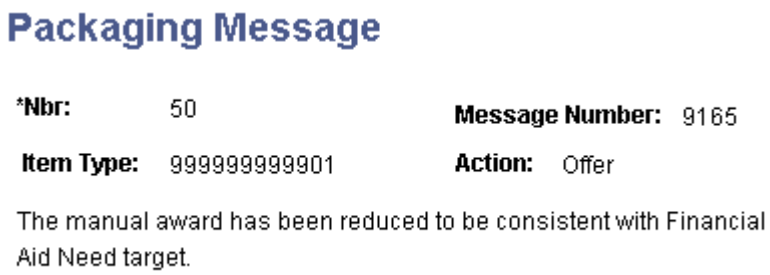
See the previous exhibit for an example of this tab.

Field or Control	Description
Description	Description of the financial aid item type. This field is populated when you move out of **Item Type** field.
Offered	The amount that you want to offer the student for this award. If no amount is entered during manual packaging and the action is *O* or *B*, the Validation process assigns an optimal award amount based on the student's eligibility, the student's financial need, the aggregate aid limits, and the financial aid item type limits. For Pell Grants, leave the offered amount at zero dollars to have the Validation process calculate the Pell Grant amount for the student based on the latest ISIR transaction, Pell COA, Alternate Pell COA, nine-month EFC/SAI, and the student's FA Load value for each term. If you enter an amount for a Pell Grant, the Validation process may adjust it depending on the student's eligibility. **Note:** To award a Pell Grant amount calculated using ISIR data other than the latest ISIR, enter the amount in the **Offered** field. To ensure that your Pell processing information matches, go to the Packaging Status Summary page and click the **PELL** link to access the Pell Information page. On the Pell Information page, select the transaction number and effective date that matches the ISIR used to calculate the Pell Grant amount.
Accepted	This is the amount of the award the student accepts. If the action was *Offer/Accept*, this amount is automatically entered and matches the offered amount. **Note:** You can decrease an award to an amount less than what has already been disbursed by manually entering an amount in the **Accepted** field that is less than the sum of the individual disbursed amounts for the award. The Packaging routine then determines a new set of scheduled disbursements based on the defined even split option or disbursement percentage associated with the award.
Disb Plan (disbursement plan)	Select a disbursement plan for the award. If the financial aid item type has a default disbursement plan defined at either the financial aid item type or the packaging plan level, that value is defaulted in this field.

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Field or Control	Description
Split Code	Select a split code. Only split codes associated with the selected disbursement plan are available. If the financial aid item type has a default split code defined at either the financial aid item type or the packaging plan level, that value is defaulted in this field.
Disbursement	This link appears after you validate an award. Click to access the Award Disbursement Detail page and view the terms, number of disbursement IDs, and amounts per disbursement ID as well as create custom split amounts and customize loan fee amounts. **Note:** Before reinstating a previously canceled Pell Grant, you must change the custom split code from *XX* to the designated disbursement plan ID for the student. You can then click the **Validation** button to have the Pell Grant amount recalculated.
Message	This link appears if a message is generated by validation or Auto Packaging. Click to access the Packaging Message page and view the reason why a particular financial aid item type failed or was reduced by validation or Auto Packaging.

This example illustrates the fields and controls on the Packaging Message pagePackaging Message page.



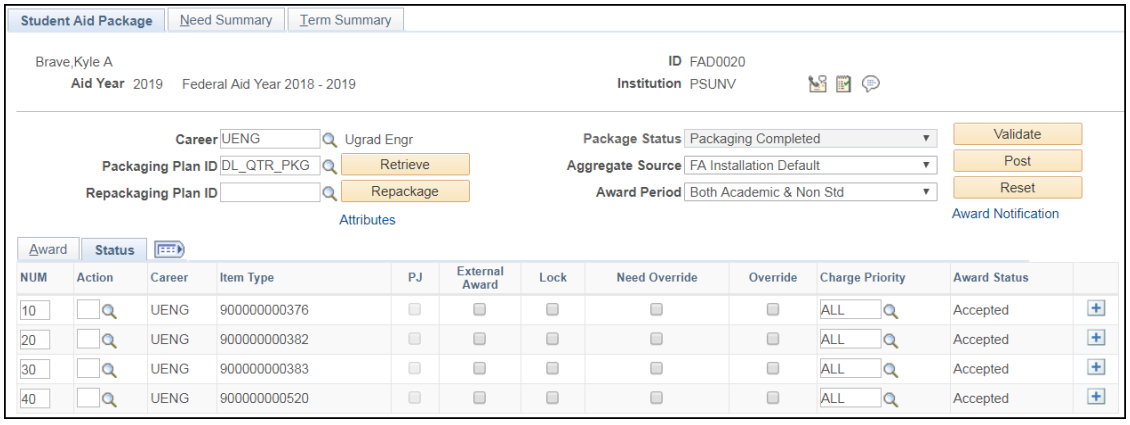
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> **Note**
>
> If you select a disbursement for three terms but have valid Financial Aid Terms for only two of the terms, how the award is treated depends on whether you selected the Missing Term Enrollment - Split evenly across valid term option for the financial aid item type. If you selected this option, then the system splits the award equally among the valid terms. If you did not select this option, the system splits the award amount as follows. (Similar calculations would occur for a four-term disbursement where only two or three Financial Aid Terms were valid.) 1) The three terms would have disbursement splits of 20%, 40%, and 40%. The percentages associated with the valid terms are added together. For example, 20% + 40% = 60% 2) To calculate each valid term's award amount, the term disbursement split (20% or 40%) is divided by the percentage calculated in #1 to get the percentage which is applied to the award amount. For example, 20% divided by 60% = 0.3333 (33.33%) and 40% divided by 60% = 0.6667 (66.67%). The award amount multiplied by 0.3333 = first term award amount and award amount multiplied by 0.6667 = second term award amount. If you want an award split equally between the two valid Financial Aid Terms, select a two term disbursement plan.

Status Tab

Select the Status tab.

This example illustrates the fields and controls on the Student Aid Package page: Status tab. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
PJ (professional judgement)	This check box is selected if an existing award was added or modified using professional judgement. This check box is display only. You can manually modify awards that have this check box selected; if you use Auto Packaging, the award is not modified. See Using Professional Judgement. Because professional judgement awards can be manually modified on this page, anyone with access to this page—not just those with access to the Professional Judgement page—can modify professional judgement awards. Members of your staff may not realize an existing award is a professional judgement award unless they check the Status page. For example, when reviewing a student's award package, a staff member sees that the student has an existing 10,000.00 USD award. The initial view of the Student Aid Package page does not indicate whether this award was made using professional judgement. To determine whether the award was made using professional judgement, the staff member should click the Status tab to see if the **PJ** check box is selected before modifying the award. You may want to address this issue during staff training, and advise your staff members to proceed cautiously.
EA (external award)	Set automatically when the External Award Load process successfully posts an external award. EA attribute is also set if an existing award is update from an external award loan transaction. For example, the External Award Load processing updating the disbursed amounts for an existing work-study award. When the EA attribute is checked, the award is prevented from being overwritten by the Auto and Mass Packaging and Repackaging processes.
Lock	Select to prevent the award from being overwritten by the Auto Packaging or Mass Packaging process and to override the financial aid item type level award amount limits. Manually locking an award does not allow you to override the fiscal, aggregate, and equity limits, and any federal or legal rules or limits. You can also set a global lock at the financial aid item type level. Doing this always sets the award to locked when performing Manual, Auto, or Mass Packaging. An example of an award you might want to lock is an award from a private source that should not be altered by another Packaging process.

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Field or Control	Description
Need Override	Select to prevent the system from changing the award amount when the student's need changes. The check box is available only for awards associated with the active career. When this check box is selected, only fiscal limits and aggregate rules are applied during validation. When this check box is selected, you do not need to select the **Lock** or **Override** check boxes because their functionality is effectively included when you select **Need Override.**
Override	Select to allow the award amount to exceed the award amount limits defined for this financial aid item type. The override does not allow award amounts to exceed legal limits, available fiscal funds, or aggregate limits.
Charge Priority	Select the type of charge you want this award to pay. The list contains the charge priority lists set up at your institution. If your institution has defined a charge priority list for the financial aid item type, it defaults in this field. See Student Financials: Defining Charge Priority List Rules.
Award Status	The current status of the award. The award status can be *Offered, Accepted, Canceled,* or *Declined.*
Adjustment Reason	If you adjust an award action, this link appears immediately after the **Award Status** field. Click to access the Award Adjustment page and enter the reason for the adjustment.

Warning

If you repackage locked and/or disbursed awards using Auto Packaging, we recommend that you post that set of awards *first* (click the **Post** button) *before performing any manual modification activity* requiring you to click the **Validation** button. In other words, if the student has a set of locked or disbursed awards, and you repackage that student using Auto Packaging, click the **Post** button first. Do not click the **Validate** button immediately upon returning from Auto Packaging, or manually change the set of awards that was returned from Auto Packaging and click the **Validate** button. If you click the **Validate** button *before posting* a set of awards that was returned from Auto Packaging, it can potentially compromise that synchronization between offer and accept amounts as well as produce a different award than anticipated.

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> **Note**
>
> If the student *does not* have a set of locked or disbursed awards, and you repackage that student using Auto Packaging, you can manually change that set of awards and click the **Validate** button immediately after Auto Packaging without needing to post that set of Auto Packaged awards first.

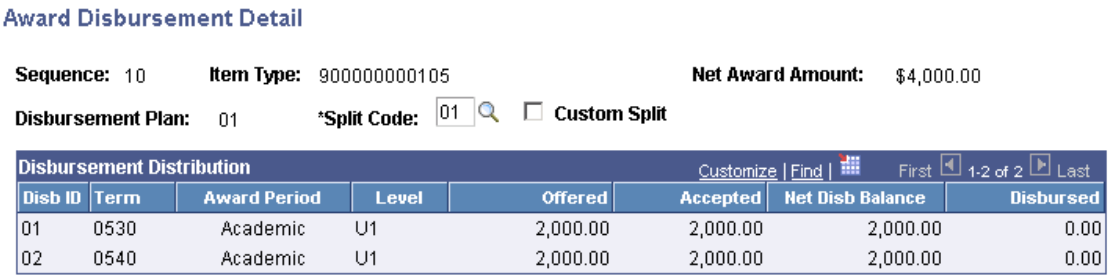
Related Topics

- Defining Default Disbursement Plans and Split Codes
  Access the FA Item Type 5 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 5**).
- Processing Awards for Multiple Award Periods Employing Passive/Active Mode
  This section provides an overview of passive/active mode in multiple award period processing and discusses how to:

Viewing Award Disbursement Detail

Access the Award Disbursement Detail page (click the **Disbursement** link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page).

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



Field or Control	Description
Sequence	The sequence number of this award.
Item Type	The financial aid item type of this award.
Net Award Amount	The award amount minus any fees, such as loan fees.
Disbursement Plan	The disbursement plan selected for the award.
Split Code	The split code selected for the award. If the **Custom Split** check box is selected, or if this is an award that originated as multiple entries with the same disbursement plan but different split codes, or if this is a Pell Grant generated by a default Pell award rule of *FA Enrollment, FA Load,* or *FA Enrollment,* this field displays *XX* to indicate that a custom split is being used.

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Field or Control	Description
Custom Split	Select to manually define a disbursement split rather than use a predefined split code. Then manually enter the offered amounts for each term. The dollar amounts for each term cannot exceed the total amount of the award. Validation must be run after any custom split codes are entered so loan fees can be recalculated and redistributed.
Custom Loan Fee	This check box appears if the award financial aid item type is defined as a loan and the award has been accepted. Select the check box to make the **Offer Loan Fee** and **Net Disb Balance** (net disbursement balance) fields available. Enter the custom loan fee amounts in the **Offer Loan Fee** field for each term. The Net Disb Balance changes based on the amount you enter in the **Loan Fee** field. When a custom loan fee is entered, it is preserved unless the loan award amount changes. You do not need to use the **Lock** or **Override** check boxes to ensure that the custom loan fees are preserved. **Note:** If the offer amount or accept amount of a loan is changed on an award entry page, the accept loan fee amounts are reset to the default loan fee amounts by the Packaging routine. After validating the new loan amounts, reenter the custom loan fee amounts if you want to have custom loan fees for the new loan amount. Loan processing can also update an award's loan fee amount as a custom loan fee if the loan fee returned by the Lender or trading partner is different from the established fee for the loan. If loan processing changes the loan fee amount, the **Custom Loan Fee** check box is selected but is not available. See Reviewing CL 4 Status and Phase Codes.

The following fields are displayed in the **Disbursement Distribution** group box. Some fields are available for editing as noted.

Field or Control	Description
Disb ID (disbursement ID)	Identifies each separate disbursement for the award.
Term	The term in which the disbursement ID is disbursed.
Award Period	The award period, academic or nonstandard, of the term.
Aggr Lvl (aggregate level)	The student's aggregate level for the disbursement ID.
Offered	The amount of the total offered amount scheduled for this disbursement ID.

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Field or Control	Description
Accepted	The amount of the total accepted amount scheduled for this disbursement ID.
Offer Loan Fee	The portion of the total loan fee, based on the total offered amount, assigned to this disbursement ID. This field appears only for loan financial aid item types and becomes available when you select the **Custom Loan Fee** check box.
Offer Rebate	The portion of the Direct Lending loan interest rebate for the offered amount assigned to this disbursement ID. This field appears only for Direct Loan financial aid item types.
Accept Loan Fee	The portion of the total loan fee, based on the total accepted amount, assigned to this disbursement ID. This field appears only for loan financial aid item types.
Accept Rebate	The portion of the Direct Lending loan interest rebate for the accepted amount assigned to this disbursement ID. This field appears only for loan financial aid item types.
Net Disb Balance (net disbursement balance)	The accepted amount for the disbursement ID plus the accept rebate amount minus the accept loan fee for the disbursement ID. If no loan fees or interest rebates exist, the net disbursement balance is the same as the accepted amount. This field becomes available when you select the **Custom Loan Fee** check box.
Disbursed	The amount disbursed to the student for this disbursement ID.

Documenting Award Adjustments

Access the Award Adjustment page (click the **Reason** link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page).

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



You can use award adjustment reasons for reporting and statistical purposes. You define the award adjustment reasons during setup.

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Field or Control	Description
Adjustment Reason	Select the appropriate reason from the list of reasons you created on the Award Adjustment Reasons page.
Loan Reason	This field appears only if you are adjusting a loan. Enter a value in this field only if you are adjusting a previously certified loan. Select a loan reason to explain the reason for the adjustment. Loan reasons are intended for use with CommonLine post-guarantee adjustment processing, but the field is currently for informational purposes only. *Canceled:* The previously guaranteed loan was canceled. *Change:* Indicates a change in the student's information as the reason for adjusting the loan. *OverAward:* Indicates a change in the loan to prevent an overaward. *Re-Issue:* A request to the lender to reissue a loan that was previously reported canceled. *Withdrawal:* Indicates the change to the student's loan amount is due to the student's withdrawal from the institution.

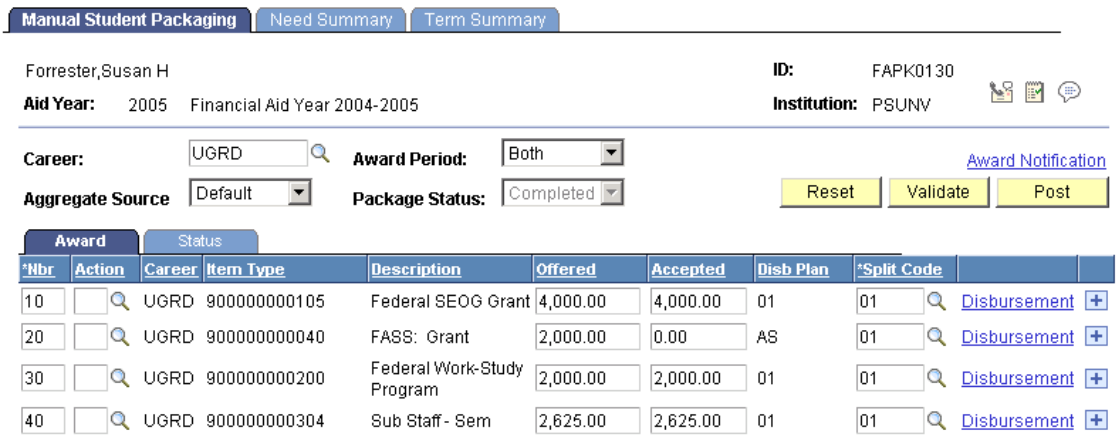
Related Topics

- Setting Up Award Messages

Awarding Students Manually

Access the Manual Student Packaging page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Departmental Awards**, and then **Manual Student Packaging**).

This example illustrates the fields and controls on the Manual Student Packaging page. You can find definitions for the fields and controls later on this page.



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This page is identical to the Student Aid Package page except the Auto Packaging functionality is not available.

Other departments on campus can use this page to enter students' departmental awards, such as academic or athletic scholarships. Using item type security, you can limit the choice of financial aid item types available for selection on the page.

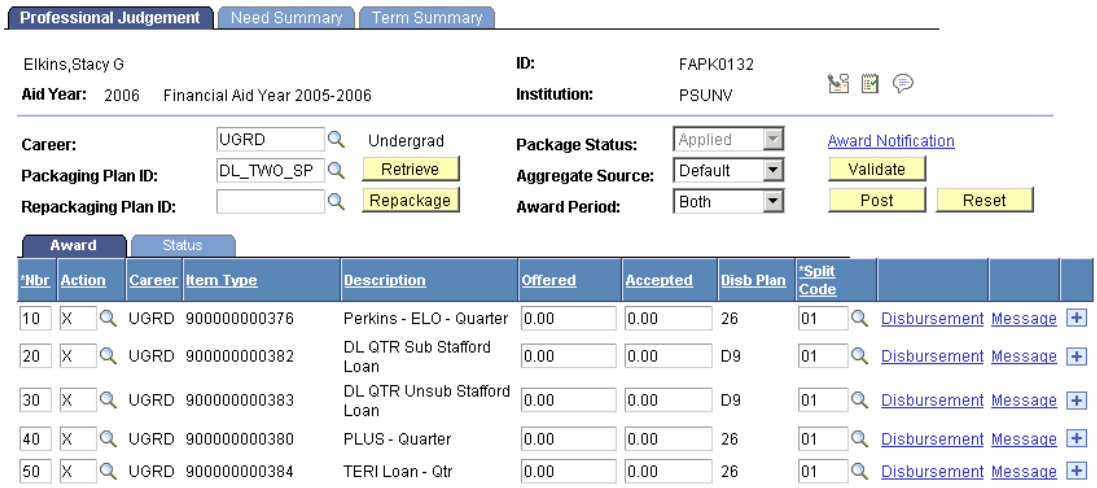
Related Topics

- Using Auto Packaging and Auto Select Packaging
  Use the Student Aid Package page for Auto Packaging and Auto Select Packaging individual students. You select the packaging plan for Auto Packaging and the system selects the packaging plan for Auto Select Packaging:

Using Professional Judgement

Access the Professional Judgement page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Invoke Professional Judgement**, and then **Professional Judgement**).

This example illustrates the fields and controls on the Professional Judgement page: Award tab. You can find definitions for the fields and controls later on this page.



The fields on the Professional Judgement page correspond to those on the Student Aid Package page. Awards that you enter or adjust on this page have the **PJ** check box selected on the Student Aid Package and Manual Student Packaging page to indicate that the normal eligibility criteria and award limits were not applied to this award.

See Using Auto Packaging and Auto Select Packaging.

The Professional Judgement page enables you to override the Packaging routine's edits—financial aid item type rules, federal aggregates (annual and lifetime), federal eligibility rules—when awarding a student. This override applies to awards that have the following actions taken:

- An award is manually entered on the Professional Judgement page.
- An existing award is changed on the Professional Judgement page.
- A change is made to an Auto Package award on the Professional Judgement page.

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Because this page can be used to bypass all federal eligibility and awarding rules, careful thought should be given when granting security for this page.

Awards that you enter or modify on this page cannot be modified on any award entry pages except the Professional Judgement page.

Award Tab

See the previous exhibit for this tab.

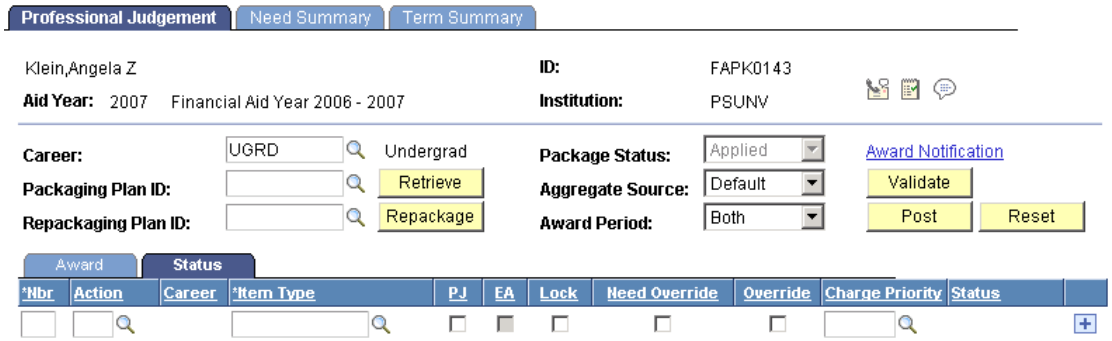
Select the Award tab.

When you use the Award tab on the Professional Judgement page to add a new manual award or to override the offered or accepted amount for an item type of an existing award, the system automatically selects the **PJ** check box on the Status tab on the Professional Judgement page.

Status Tab

Select the Status tab.

This example illustrates the fields and controls on the Professional Judgement page: Status tab. You can find definitions for the fields and controls later on this page.



When you add a new award manually or override an existing award, the system selects the corresponding check box in the **PJ** column for the adjusted item type. You can clear this check box.

Performing Mass Packaging Using Application Data

This section discusses how to:

- Run Mass Packaging selection.
- Review students selected for Mass Packaging.
- Assign packaging plans to students.
- Review packaging plans assigned by query.
- Review packaging plans assigned by packaging plan.
- Process Mass Packaging.

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Pages Used to Perform Mass Packaging Using Federal Application Data

Page Name	Definition Name	Navigation	Usage
Mass Packaging Select	RUNCTL_FA_BPKG	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **Select Students**, and then **Mass Packaging Select**	Run mass packaging selection, which selects the students that you defined on the Mass Packaging Select Students page. This is the first of the three processes for Mass Packaging.
Mass Packaging by Students	FA_BPKG_STDLIST	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Results by Students**, and then **Mass Packaging by Students**	Review a list of the student selected using the Mass Packaging selection definition in the Mass Packaging Student Select process.
Mass Packaging Assign	RUNCTL_FA_BPKG_ASN	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **Assign Plans**, and then **Mass Packaging Assign**	Assign packaging plans by running the second step in Mass Packaging, associating a packaging plan (or series of packaging plans) with the students who have been selected for Mass Packaging.
Mass Packaging Plans Assigned	FA_BPKG_PLANQRY	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Results by Query**, and then **Mass Packaging Plans Assigned**	Review the packaging plans assigned to students, who are sorted by ID. You can also view students not assigned a packaging plan.
Mass Packaging Students by Plan	FA_BPKG_STDPLAN	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Results by Plan**, and then **Mass Packaging Students by Plan**	Review the packaging plans assigned to students sorted by the **Sort Field** field designated on the Mass Packaging Assign page. This page displays one packaging plan at a time.
Mass Packaging Process	RUNCTL_FA_BPKG_PRC	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **Process Mass Packaging**, and then **Mass Packaging Process**	Process mass packaging. Initiate the eligibility review and award calculation routine, which is the third and last step in the Mass Packaging process.

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Running Mass Packaging Selection

Access the Mass Packaging Select page (**Financial Aid**, and then **Mass Packaging**, and then **Awards**, and then **Select Students**, and then **Mass Packaging Select**).

Selection of students is based on the Selection Tool criteria defined in the query, equation, or external file. No other assessment is used to filter students for the Mass Packaging process.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. The **Population Selection** group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool (PS Query, Equation Engine, or external file) to identify IDs for a specific transaction, you must use it.

See Campus Community Fundamentals: Using the Population Selection Process.

Field or Control	Description
Selection Tool	Displays if Population Selection check box is selected. Select from: *Equation Engine, PS Query,* or *External File,* or enter a tool that your institution created to select the IDs to assign to the student group. Additional parameters are displayed for your selected tool.
Query Name	Displays only when *PS Query* is selected in the **Selection Tool** field. Select a PS Query that uses one of these bind records: • Use SFA_BPKGX_BIND if your criteria is not career-dependent. • Use SFA_BPKG_BIND if Career is a criteria element.
Equation	Displays only when *Equation Engine* is selected in the **Selection Tool** field. Select an equation that is defined with the application prompt Mass Packaging Selection.

Parameters

Field or Control	Description
Institution and **Aid Year**	Enter the institution and aid year for which to run Mass Packaging.

Reviewing Students Selected for Mass Packaging

Access the Mass Packaging by Students page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Results by Students**, and then **Mass Packaging by Students**).

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Field or Control	Description
Process Status	Indicates whether the student is packaged with this batch of students in the next two steps of Mass Packaging. *Invalid:* The student is not included in this Mass Packaging run. *Valid:* The student is processed during this Mass Packaging run.

You can delete the student's row or change the Process Status to *Invalid* to remove any students you do not want to be included in this packaging batch. If students have multiple careers, a row exists for each career for which they are packaged.

Assigning Packaging Plans to Students

Access the Mass Packaging Assign page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **Assign Plans**, and then **Mass Packaging Assign**).

Select the Mass Packaging **Selection Definition** that you are using to select your students for the current Mass Packaging run.

In the **Packaging Plan Parameters** group box, select one or more packaging plans the system should apply against the current group of students selected for Mass Packaging.

Field or Control	Description
Career	The career you select here determines the packaging plans available in the **Plan ID** field.
Plan ID	The ID of the packaging plan to apply to eligible students in this Mass Packaging run. Only packaging plans associated with the selected career are available. It does not matter in what order you list the plan IDs on this page. If you list multiple packaging plans, the packaging plans are applied against the selected students based on the processing order defined for each packaging plan in the packaging plan setup. You can review the students and the packaging plans that have been associated with them after you run the process.

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Field or Control	Description
Sort Field	Select a field on which to sort students within each plan. You must then choose to sort the students in either ascending or descending order. For example, you could sort students based on ascending EFC/SAI or descending federal need. The third step of the Mass Packaging process evaluates students in the order in which they are sorted. The fields by which you can sort students are: • *ADJ_PAR_CONTRIB* (Adjusted Parent Contribution) • *AGI_PAR* (Parents' Adjusted Gross Income) • *AGI_STU* (Students' Adjusted Gross Income) • *EMPLID* (Employee ID) • *FED_EFC* (Federal Effective Family Contribution) • *FED_NEED* (Federal Need) • *FED_PARENT_CONTRB* (Federal Parent Contribution) • *FED_STDNT_CONTRB* (Federal Student Contribution) • *INST_EFC* (Institutional Effective Family Contribution) • I*NST_PARENT_CONTRB* (Institutional Parent Contribution) • *INST_STDNT_CONTRB* (Institutional Student Contribution) • *PRORATED_EFC* (Prorated Effective Family Contribution) • *SAI* (Student Aid Index) • *TRANS_PROCESS_DT* (Transaction Process Date) Do not use FED_EFC for packaging plans that have a non-standard award period. FED_EFC represents the PRIMARY_EFC, which is the 9–month EFC/SAI that is synonymous with the academic award period. Therefore, all non-standard award period FED_EFC values equal 0.00. If you sort by FED_EFC for non-standard plans, the system defaults the sort order to EMPLID.

Field or Control	Description
Asc (ascending)	Select this option to have the students sorted in ascending order.
Desc (descending)	Select this option to have the students sorted in descending order.
Run	Run the Mass Packaging Plan Assignment process (FAPPKASN) when you are ready to assign packaging plans.

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Reviewing Packaging Plans Assigned by Query

Access the Mass Packaging Plans Assigned page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Results by Query**, and then **Mass Packaging Plans Assigned**).

To identify each packaging plan, the page displays three fields from the Mass Packaging Assign page—**Packaging Plan ID, Academic Career,** and **Sort Packaging by**— and the **Plan Order** from the packaging plan setup. The plan order is the processing order for the packaging plan. Use the scroll arrows to view the other packaging plan IDs used for this Mass Packaging session.

For each packaging plan, the page displays the students selected for the packaging plan in ascending ID order. The list provides the student's ID, name, and value for the field identified in the **Sort Packaging by** field (the name of the third column changes to match this field). Click **Remove** to remove a student from the list and prevent the student from being packaged during the final step of the Mass Packaging process.

Reviewing Packaging Plans Assigned by Packaging Plan

Access the Mass Packaging Students by Plan page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Results by Plan**, and then **Mass Packaging Students by Plan**).

To identify each packaging plan, the page displays three fields from the Mass Packaging Assign page—**Packaging Plan ID, Academic Career,** and **Sort Packaging by**—and the **Plan Order** from the packaging plan setup. The plan order is the processing order for the packaging plan.

For each packaging plan, the page displays the students selected for the packaging plan, sorted by the field identified in the Sort Packaging by field. The list provides the student's ID, name, and value for the field identified in the **Sort Packaging by** field (the name of the third column changes to match this field). Click **Remove** to remove a student from the list and prevent the student from being packaged during the final step of the Mass Packaging process.

You can view students who were not assigned a packaging plan by selecting a career but no packaging plan when you open the page.

Processing Mass Packaging

Access the Mass Packaging Process page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **Process Mass Packaging**, and then **Mass Packaging Process**).

Field or Control	Description
Selection Definition	Select the name of the student group defined on the Mass Packaging Select page.
Methodology	Select which need analysis methodology to use: *Federal*, *Institutional*, or *Both*. This is an optional field where Federal is the default value. It is an information-only field that allows users to define with which Methodology the batch was packaged.

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Field or Control	Description
Live	Select this mode to run the process and commit the awards to the database. This includes tables such as student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log. **Note:** Oracle recommends that you run in Simulation mode at least once before running in Live mode.
Simulation	Select this mode to simulate and view results. You can then refine your repackaging plan rules and rerun Batch Repackaging Simulation to produce the desired award amounts. When you are satisfied with the Simulation results, rerun Batch Repackaging in Live mode.

Select **Simulation** or **Live** as the mode for which you want to run this Mass Packaging. If you select **Simulation**, you can review the results before deciding to update all award tables. If you select **Live**, the process updates all award-related tables.

> **Note**
>
> It is highly recommended that you run the Mass Packaging process in Simulation mode at least once before running it in Live mode.

A student can receive one, none, all, or some of the awards defined in the packaging plan assigned to them. The system applies your financial aid item type rules, federal eligibility rules, fiscal limits, and aggregate aid rules to determine whether the student receives a particular award as part of their package. The Mass Packaging process also determines award amounts, disbursement plans, and split codes for each award.

When you run the third step of the Mass Packaging process in Live mode, the process updates various tables including student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log. If the Mass Packaging process encounters an error, the Posting process provides a message regarding the reason the student was not packaged and the student is displayed on the Mass Packaging Errors page. The Mass Packaging process continues packaging students and writing errors to the Mass Packaging Errors page until it reaches the number of errors allowed by the **Background Errors Allowed** field on the Financial Aid Defaults page. When the allowed errors limit is reached, the Mass Packaging process stops.

> **Note**
>
> Students whose award record encounters posting errors during Mass Packaging Live mode appear on the Mass Packaging Details component **(Financial Aid**, and then **Awards**, and then **Mass Packaging)** as well as the Mass Packaging Errors page. However, these students have not actually been packaged. The Mass Packaging Details pages displays the awards the student would have received if there were no posting errors.

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Run the Mass Packaging process (FAPPKBKG) when you are ready to package students.

Reviewing Mass Packaging Results

You can use these pages to view detailed information regarding the student's financial aid eligibility, need information, and specific award information. You can also view a list of students who were not packaged because they did not meet the selection criteria for any of the packaging plans used in the Mass Packaging process.

This section discusses how to:

- Review Mass Packaging summary information.
- Review student eligibility and need information.
- Review student award information.
- Review Mass Packaging errors.

Pages Used to Review Mass Packaging Results

Page Name	Definition Name	Navigation	Usage
Mass Packaging Summary	PKG_BATCH_SUMM	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Summary**, and then **Mass Packaging Summary**	Review the number of students selected for each packaging plan and those students packaged by the Mass Packaging process.
Eligibility/Need	PKG_BATCH_STDNT	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Details**, and then **Eligibility/ Need**	Review a student's financial aid eligibility and need information based on the results of the packaging plan. This page displays information for a single packaging plan.
Awards Detail	PKG_BATCH_AWD	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Details**, and then **Awards Detail**	Review detailed information about the awards that were packaged for a student as a result of the Mass Packaging process.
Mass Packaging Award Message	PKG_BATCH_MSG_SEC	Click the **Message** link on the Awards Detail page.	View the reason why the student did not receive this award.
Mass Packaging Disbursement	PKG_BATCH_DISB_SEC	Click the **Disbursement** link on the Awards Detail page.	View scheduled disbursement detail for an award.

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Page Name	Definition Name	Navigation	Usage
Mass Packaging Errors	PKG_BATCH_ERR	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Errors**, and then **Mass Packaging Errors**	Review students who were not packaged by any packaging plan and an explanation of why they were not packaged.
Mass Packaging Error Detail	PKG_BATCH_ERR_SEC	Click the **Detail** link on the Mass Packaging Errors page.	View the error message associated with the error code displayed on the Mass Packaging Errors page.

Reviewing Mass Packaging Summary Information

Access the Mass Packaging Summary page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Details**, and then **Mass Packaging Summary**).

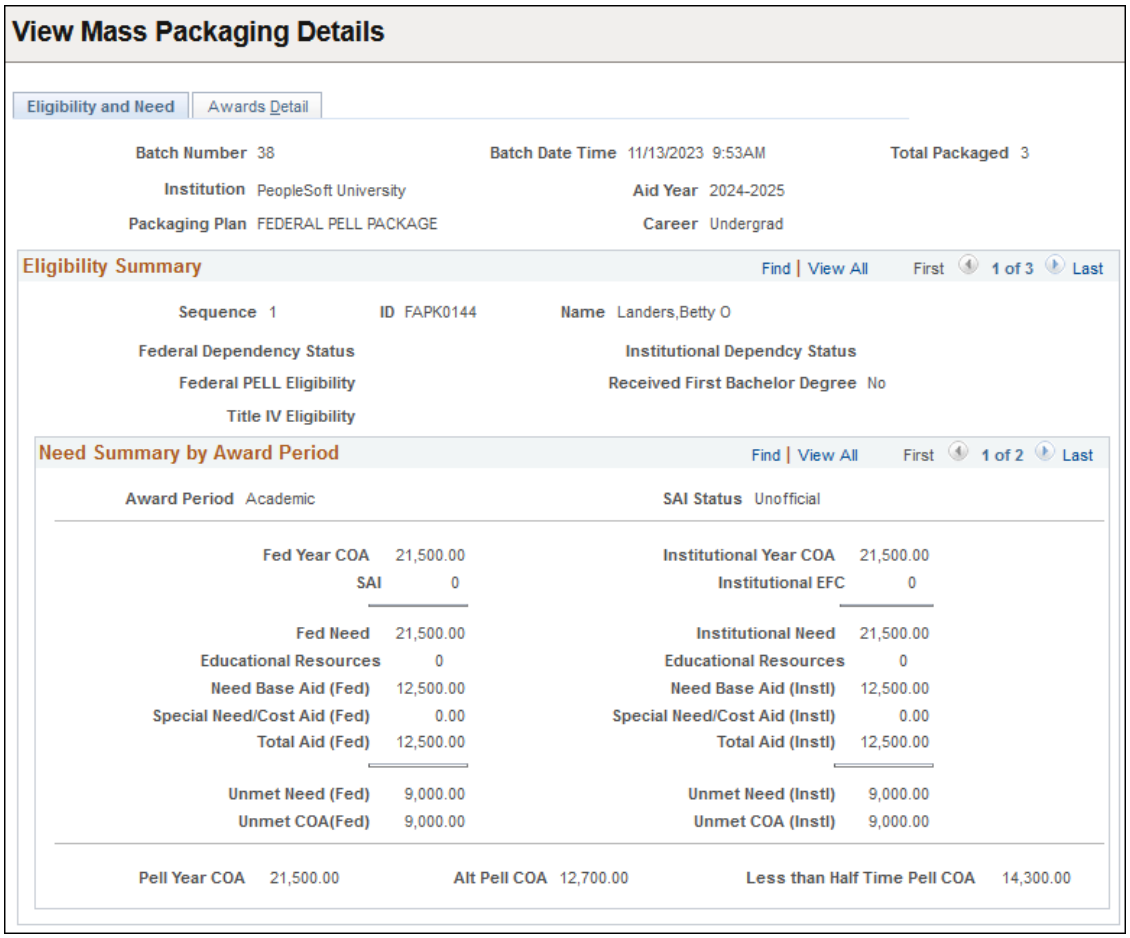
Field or Control	Description
Batch Number	The number assigned to the batch of students when you run the Mass Packaging process.
Batch Date Time	The date and time you ran the Mass Packaging process or Institutional Mass Packaging process for this batch of students.
Live vs. Simulation	Indicates whether you ran the Mass Packaging process in live or simulation mode. *Live:* The Mass Packaging process updated all award-related tables. *Simulation:* You can review the results of the Mass Packaging process, but award-related tables were not updated.
Methodology	Displays which need analysis methodology was specified during the mass packaging run: *Federal*, *Institutional*, or *Both*.
Packaging Plan ID	Identifies the packaging plan used in the Mass Packaging run.
Total Selected	The total number of students assigned this packaging plan.
Total Packaged	The total number of students who were successfully packaged using this packaging plan.
Total Not Packaged	The total number of students who were assigned this packaging plan but did not receive any awards because of one or more errors.

Reviewing Student Eligibility and Need Information

Access the Eligibility/Need page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Details**, and then **Eligibility/Need**).

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This example illustrates the fields and controls on the Eligibility/Need page. You can find definitions for the fields and controls later on this page.



This page displays information for a single packaging plan. To see other students packaged using the selected packaging plan, use the top set of scroll arrows. Use the bottom set of scroll arrows to view the information for each student by award period.

Field or Control	Description
Sequence	The sequence number indicates the order in which students were packaged during Mass Packaging.
Federal Dependency Status	Indicates whether the student is dependent or independent under federal methodology.
Institutional Dependency Status	Indicates whether the student is dependent or independent under institutional methodology.
Federal Pell Eligibility	Indicates whether the student is eligible to receive a Pell Grant.
Received First Bachelor Degree	Indicates whether the student has already received his or her first bachelor's degree.
Title IV Eligibility	Indicates whether the student is eligible to receive federal Title IV aid.

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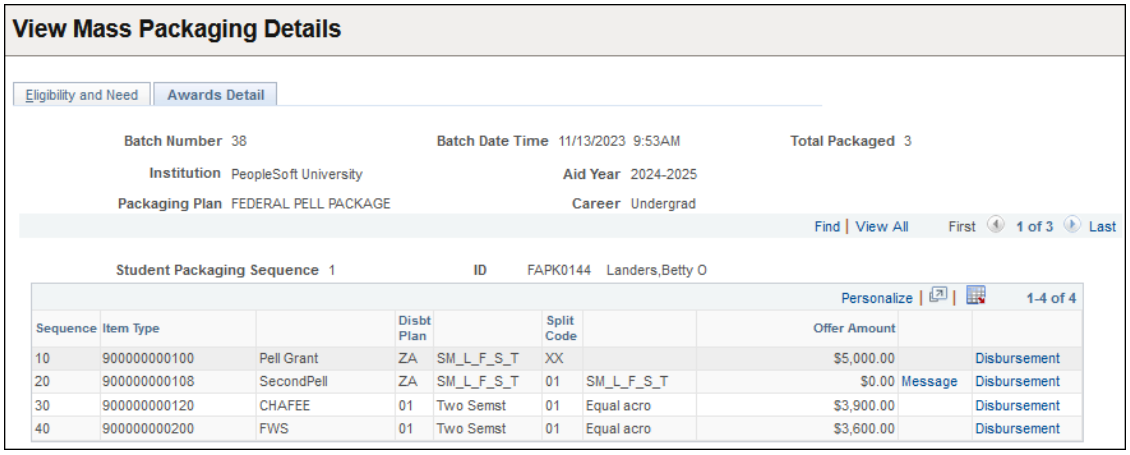
Related Topics

- Viewing Need Summary Information
  Access the Need Summary page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Need Summary**).

Reviewing Student Award Information

Access the Awards Detail page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Details**, and then **Awards Detail**).

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



All awards in the packaging plan are displayed for each student. The page displays zero and nonzero awards—nonzero awards display the scheduled disbursements.

Field or Control	Description
Student Packaging Sequence	The sequence number indicates the order in which students were packaged during Mass Packaging.
Sequence	The sequence number automatically assigned in increments of ten when awards are entered.
Item Type	The financial aid item type of the student's award.
Disbursement Plan	The disbursement plan assigned to the student's award.
Split Code	The split code of the student's award, which indicates how the award is split for disbursement to the student.
Offer Amount	If the Offer Amount for an award is 0.00, then the student was not eligible for that particular award or it was an unlocked, preexisting award which was set to 0.00 by Mass Packaging. The awards with a zero Offer Amount are no longer visible after the student's award package is posted.

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Field or Control	Description
Message	Click to access the Mass Packaging Award Message page and view the reason why the student did not receive this award.
Disbursement	Click to access the Mass Packaging Disbursement page and view scheduled disbursement detail for an award.

Reviewing Mass Packaging Errors

Access the Mass Packaging Errors page (**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **View Mass Packaging Errors**, and then **Mass Packaging Errors**).

Only students who had serious errors (such as students who had their Financial Aid Term deleted) during the actual Mass Packaging run are in this list. Generally, no students should be listed on this page. If students are listed, look beyond the packaging plan for the reasons for the error.

Field or Control	Description
Batch # (batch number)	The batch number identifies the particular Mass Packaging session.
Batch Date Time	The date and time the Mass Packaging session was run.
Total Not Pkgd (total not packaged)	The total number of students who were assigned to the packaging plan but were not packaged due to an error.
Pkg Plan (packaging plan)	The packaging plan with which the system tried to package the listed students.
Error Sequence	Key by which the error data is sorted.
ID	The ID of the student who was not packaged.
Error	The message number that identifies the error that prevented the student from being packaged.
Detail	Click to access the Mass Packaging Error Detail page and view the error message associated with the displayed error code.

Mass Packaging Error Messages

The following table lists and explains possible Mass Packaging posting error messages:

Message Number	Message Text	Message Explanation
108	The Disbursement ID Table entries have no terms associated with them.	The disbursement plan's Disbursement ID Table either has no entries or the entries do not have terms specified. Enter Disbursement ID table entries or update the existing entries with valid terms.

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Message Number	Message Text	Message Explanation
111	There is no Student Award Period record for the awarded period.	The student does not have a Student Award Period record for the period being awarded.
112	The maximum number of Term records is exceeded.	The limit to the number of Term records that can be associated with an award period is exceeded by this disbursement plan. Either reduce the number of terms or contact your technical resource to increase the maximum number of term records permitted in an award period.
113	The maximum number of Student Award Period records is exceeded.	The limit to the number of Student Award Period records that can be associated with a student for the award period is exceeded by this student. Either eliminate some of the Student Award Period records or contact your technical resource to increase the maximum number of Student Award Period records permitted.
114	There is no Set ID for this Institution's item types.	The institution does not have an "Item Type" Set ID in the Set Control Group Table. The Set ID is used to determine which group of item types is valid for this institution. Determine the correct Set ID for this institution's item types and create an Item Type record in the Set Control Group Table for this institution.
115	The Item Type is Invalid.	The transaction's financial aid item type is not valid.
132	The Transaction has a custom split code but no Award Disbursements.	The transaction has a custom split code of 'XX' which requires award disbursement records to be associated with the transaction, but there are none. Either supply the missing disbursement records or specify an existing disbursement plan.
140	The existing Student Award has no disbursement records.	The existing Student Award has no disbursement records. All Student Awards are required to have disbursement records. Contact technical support and report this error.

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Message Number	Message Text	Message Explanation
141	The existing Student Award's Disbursement Records maximum is exceeded.	The existing Student Award has more Disbursement Records than are supported by the FAPAWPST program. The FAPAWPST program can be modified to support more Distribution Records; this transaction cannot post until the program is modified.
152	No CPS/FPS school code for this Institution.	There is no CPS/FPS school code specified for this transaction's Institution, Aid Year, Academic Career combination. Either the combination is invalid or the CPS/FPS school code needs to be added to the database for this Institution, Aid Year, Academic Career combination.
155	No Student Aid Attribute Record was found for this transaction.	No Student Aid Attribute Record was found for this transaction.
156	No Award Summary Information was found for this transaction.	No Award Summary Information was found for this transaction.
158	An error was encountered when processing aggregates for this student.	An error was encountered when processing aggregates for this student.
159	No Student Award information was found for this student.	No Student Award Information was found for this student.
160	No Student Award Summary was found for this transaction.	No Student Award Summary was found for this transaction.
161	No Disbursement Information was found for this transaction.	No Disbursement Information was found for this transaction.
162	No Disbursement Summary information was found for this transaction.	No Disbursement Summary information was found for this transaction.
163	Disbursement ID was not found in Disbursement Plan for this transaction.	Disbursement ID was not found in disbursement plan for this transaction.
165	Maximum number of Disbursement Plans was exceeded.	Maximum number of disbursement plans was exceeded.
166	Term not found in Disbursement Plan for this transaction.	Term not found in disbursement plan for this transaction.
9328 (Generic Message)	Student failed the batch Posting process. The Awards were not posted.	Student failed the batch Posting process. The Awards were not posted.

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Message Number	Message Text	Message Explanation
9330	Student failed Batch Posting. Awards not posted. Multiple Disb Plans for Non-Canceled Item Type.	Student's package contains multiple instances of the same financial aid item type that have not been canceled where the disbursement plans are different.
9331	Student failed Batch Posting. Awards not posted. Multiple Disb Plans - Loan in transit.	Student's package contains multiple instances of the same loan financial aid item type in transit that have not been canceled where the disbursement plans are different.
9332	Student failed Batch Posting. Awards not posted. Multiple Disb Plans - Loan was originated.	Student's package contains multiple instances of the same loan financial aid item type (at least one originated) that have not been canceled where the disbursement plans are different.
9333	Failed Batch Posting. Awards not posted. Multiple Disb Plans - Auth/Disb balances greater than 0.	Student's package contains multiple instances of the same financial aid item type that have not been canceled where the disbursement plans are different. Authorization/ disbursement has occurred and the authorization/ disbursement amount is greater than zero.
9334	Student failed Batch Posting. Awards not posted. Offer available is negative (Item Type Fiscal).	Award offer amount can never be negative on the Assign Fiscal Limits page.
9335	Student failed Batch Posting. Awards not posted. Accept available is negative (Item Type Fiscal).	Award accept amount can never be negative on the Assign Fiscal Limits page.
9336	Failed Batch Posting. Awards not posted. Multiple Aggregate Levels for same Career & Item Type.	Student cannot have multiple aggregate levels for the same financial aid item type and same career
9337	Student failed Batch Posting. Awards not posted. Unable to update Award Aggregates data.	Error detected while trying to update aggregate information for this student. Batch Posting process failed; award not posted.

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29

Awarding Pell Grants

Awarding Pell Grants for the 2024-2025 and Future Aid Years

This section provides an overview of Pell Grant awarding and discusses how to:

- Define Pell eligibility calculation setup.
- Define Aggregate Aid Limit Percentage Maximums for Pell Grant.
- Calculate Pell Grants.
- Package Pell Grants Using Pell Table Enablement Tables
- Repackage Pell Grants.
- Manually award Pell Grants.
- Award Pell Grants using professional judgment.
- Reinstate a cancelled Pell Grant award.
- Award Pell Grants for post-baccalaureate teaching certificate candidates.

Understanding Pell Grant Awarding

The Pell Grant awarding functionality automatically calculates a Pell Grant award based on a student's:

- SAI (from the ISIR)
- Max Pell Indicator (from the ISIR)
- Min Pell Indicator (from the ISIR)
- Maximum Scheduled Pell Amount
- Minimum Scheduled Pell Amount
- IASG Indicator (from the ISIR)
- CFH Indicator (from the ISIR)
- Pell Grant Formula and Enrollment Intensity
- Total Percent Used
- Lifetime Eligibility Used

Maximum Scheduled Award

The system determines a student's maximum scheduled Pell Grant (full-time, full-year Pell Grant award) by using:

- Student Aid Index (SAI): The student's SAI from a valid Institutional Student Information Report (ISIR)
- Pell Grant Cost of Attendance (COA): The student's Pell COA or Pell COA for Less-Than-Half-Time (LTHT)

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> **Note**
>
> If the student is enrolled only in terms tied to the Academic Award Period, Packaging uses the Academic Pell COA for determining Pell Grant awards.
>
> If the student is enrolled in terms tied to both the Academic and Non-Standard Award Periods, Packaging uses the Academic Pell COA for determining Pell Grant awards.
>
> If the student is enrolled only in terms tied to Non-Standard Award Period, Packaging uses the Non-Standard Pell COA for determining Pell Grant awards.

See Defining Budget Components.

The system uses the student's SAI, Max Pell Indicator, Min Pell Indicator, IASG Indicator, CFH Indicator, Pell COA, Maximum Scheduled Pell Amount, and Minimum Scheduled Pell Amount to determine the student's maximum scheduled Pell grant award.

Pell Grant Formula and Enrollment

These Pell Grant Formula options are available:

- Formula 1 — FA Load
- Formula 1 — Full-time
- Formula 3 — FA Load
- Formula 3 — Current Load
- Formula 3 — Full-time

Among the formula options, there are three enrollment values used:

- **FA Load**

  The Financial Aid Term build process determines the student's Enrollment Intensity using the units in the **FA Taken** field and the academic level and load rules. The **Enrollment Intensity** field can be locked using census-date locking. If you use census-date locking, you may want to use the census date locked value (Enrollment Intensity) for any Pell recalculations that occur after the financial aid census date.

- **Current Load**

  Current Load calculates the student's enrollment load using the units from sessions the student is currently enrolled (**In Progress** value from FA Term) in as well as sessions within the term that the student has already completed (**Completed** value from FA Term). This field enables you to calculate the enrollment load of Open Entry/Open Exit students more accurately.

- Full-time

  The student's full-time enrollment is assumed.

You can choose to calculate the student's Pell Grant eligibility using different default enrollment values for different points in time in relation to the term:

- before the term's start date,
- on or after the term's start date but before the financial aid census date, and
- on or after the financial aid census date.

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Having different values for these three points in time gives you flexibility in calculating Pell Grant awards. For example, for Formula 1, you can calculate a student's Pell Grant using a projected full-time enrollment value for the period prior to the term start date. Then when the student's term begins, you can recalculate the student's Pell Grant award using the student's actual enrollment (Enrollment Intensity).

> **Note**
>
> If a term does not have a financial aid census date established, the Pell recalculation process uses the academic census date (defined in Student Records).

See Defining Pell Eligibility Calculation (PEC) Setup.

See Calculating Pell Grants.

Total Percent Used

The amount of Pell Grant the system can award a student also takes into account the percentage of a student's maximum scheduled Pell Grant award that has already been used. The system uses the **Percent Scheduled Used** from a student's incoming Aggregate Aid Data and any existing Pell Grant awards packaged by the system for the aid year to calculate the Total Percent Used.

The **Percent Scheduled Used** is populated by the NSLDS Data Push process but can also be overridden manually.

With the implementation of Year Round Pell beginning in the 2017-2018 award year, students can receive up to 150 percent of their Federal Pell Grant Scheduled Award in a single award year. You must define the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

See Defining Aggregate Aid Limit Percentage Maximums and Amounts for Pell Grants.

See Calculating Pell Grants.

Lifetime Eligibility Used

The system takes into account the total amount of Pell Grant a student has used across all aid years in pursuit of an undergraduate degree. The system uses **Lifetime Eligibility Used** and **Percent Scheduled Used** from a student's incoming Aggregate Aid Data and any existing Pell Grant awards packaged by the system for the aid year to determine the student's remaining Pell Grant eligibility.

Defining Pell Eligibility Calculation (PEC) Setup

You must complete the Pell Eligibility Calculation (PEC) setup for your Pell Grants to be properly calculated. PEC setup is done at the institution defaults level and be overridden at the academic career, academic program, and student levels.

The fields that define your PEC setup are:

- **Academic Base Weeks**
- **Non-Standard Base Weeks**
- **Pell 3 Academic Weeks Only**
- **Pell Calculation Start**

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- **Pell Calculation Midterm**
- **Pell Calculation Census**
- **Pell Number of Terms**

Defining PEC at the Institution Level

Access the Financial Aid Defaults page (**Set Up SACR**, and then **Install**, and then **Financial Aid Installation**, and then **Financial Aid Defaults**).

Because the values you enter on this page are used as installation level defaults, they should be the values you want to use for most of your undergraduate programs.

> **Note**
>
> For a complete description of this page: See Establishing Defaults.

Field or Control	Description
Academic Base Weeks	Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate Student Aid Index (SAI). Valid values are 0.0 to 99.9.
Non-Standard Base Weeks	Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate SAIs. Non-standard terms are usually summer terms or inter-sessions. Valid values are 0.0 to 99.9.
Pell 3 Academic Weeks Only	Select so the Pell Grant calculation uses only Academic Base Weeks as the Academic Program's Weeks of Instruction for Formula 3. If not selected, the Pell Grant calculation sums the Academic Base Weeks and Non-Standard Base Weeks together to determine the Academic Program's Weeks of Instruction. **Note:** An Academic Program's Weeks of Instruction serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term when calculating Pell Grant eligibility for Formula 3 — FA Load, Formula 3 — Current Load, and Formula 3 — Full-time Load.

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Field or Control	Description
Pell Calculation Start	Enter the calculation mode to use for Pell calculations made before the student's academic term start date: *Formula 1 — FA Load*: Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses the student's **Enrollment Intensity** for each term. *Formula 1 — Full-time*: Directs the Pell calculation to divide the Scheduled Pell Grant by the **Pell Number of Terms** and uses full-time 100% as the student's **Enrollment Intensity** for each term. *Formula 3 — Current Load*: Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the Current Load **Enrollment Intensity** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The **Current Load** value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term. *Formula 3 — FA Load*: Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the **Enrollment Intensity** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. *Formula 3 — Full-time Load*: Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time 100% **Enrollment Intensity** as the value when it is calculating the student's eligibility.
Pell Calculation Midterm	Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

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Field or Control	Description
Pell Calculation Census	Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.
Pell Number of Terms	Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no automatic cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using *Formula 1 - FA Load* or *Formula 1 - Full-time* Pell calculation values. If you select *Formula 1 - FA Load* or *Formula 1 - Full-time,* you must populate the Pell Number of Terms field. Valid values are *0 to 99.*
Use PELL Crossover Logic	Select this check box if you want the system to a check the summer/crossover term to determine if a Pell Grant award for that term would be higher if it is awarded using the *Additional* Pell Item Type for the current Aid Year (e.g. Aid Year 2018) or the *Initial* Pell Item Type in the forward Aid Year (e.g. Aid Year 2019). If selected and the award would be higher for the forward Aid Year, the system awards zero Pell Grant for the summer/crossover term under the Additional Pell item type the current Aid Year. If the Pell Grant award for the summer/crossover term is higher using the current Aid Year, it will award the amount as Additional Pell. If *not* selected, the system awards Pell Grant for the summer/crossover term as Additional Pell in the current Aid Year without additional checks against the forward Aid Year.

Overriding PEC at the Career Level

Access the Aid Processing Rule Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Processing Rule Setup**) and the Valid Careers for Aid Year page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Careers for Aid Year**).

> **Note**
>
> For a complete description of the Aid Processing Rule Setup page: See Establishing Defaults .

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> **Note**
>
> For a complete description of the Valid Careers for Aid Year page: See Establishing Careers and Programs.

For careers that require a different PEC setup than specified on the Financial Aid Defaults page, create an aid processing rule set with the required PEC setup for those careers. You create aid processing rule sets on the Aid Processing Rule Setup page; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you assign aid processing rule sets on the Valid Careers for Aid Year page to only those careers that need a PEC setup that differs from the installation level default. If two careers require the same PEC setup (which differs from the installation level default setup), create only one aid processing rule set and select it for each career.

> **Note**
>
> You do not need to create an aid processing rule set for every career. You do not need to assign an aid processing rule set to every career on the Valid Careers for Aid Year page. If you do not specify an aid processing rule set on the Valid Careers for Aid Year page, the Packaging routine uses the installation defaults for PEC.

For example, you may want to create an aid processing rule set for a career where the Base Weeks of Instruction is greater or less than the Base Weeks of instruction at the installation default level. On the Aid Processing Rule Setup page, you would specify the values for the weeks of instruction in the **Academic Base Weeks** and **Non-Standard Base Weeks** fields for these careers. Fill out all fields in the aid processing rule set.

Overriding PEC at the Program Level

Access the Aid Processing Rule Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Processing Rule Setup**) and the Valid Programs for Aid Year and Career page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Programs for Aid Year**).

> **Note**
>
> For a complete description of the Aid Processing Rule Setup page: See Establishing Defaults.

> **Note**
>
> For a complete description of the Valid Programs for Aid Year and Career page: See Establishing Careers and Programs.

For academic programs that require a different PEC setup than specified at the career or installation level, create an aid processing rule set with the required PEC setup; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you

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assign aid processing rule sets to only those academic programs that require a PEC setup different from the career or installation level default on the Valid Programs for Aid Year page. If two academic programs require the same PEC setup, create only one aid processing rule set and assign it to both academic programs.

For programs, the Pell number of terms that you enter on the Aid Processing Rule Setup page must match the Pell number of terms at the career level.

> **Note**
>
> You do not need to create an aid processing rule set for every career/program combination. You do not need to enter every program on the Valid Programs for Aid Year page. If you do not specify an aid processing rule set on the Valid Programs for Aid Year page, the Packaging routine uses the career or installation level defaults for PEC. For example, if an Academic Program supports a Leading Summer term, you want to create a unique PEC that distinguishes it from an Academic Program that does not support a Summer Term

Overriding PEC at the Student Level

Access a student's Pell Calculation Eligibility Student Override page **(Financial Aid**, and then **View Packaging Status Summary)** and click on the Pell Calculation Override link after querying a student.

> **Note**
>
> For a complete description of the Pell Calculation Eligibility Student Override page: See Reviewing the Student's Packaging Status.

Field or Control	Description
Status	Select *Active* to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods. Select *Inactive* to use the PEC setup at FA installation, career, or program level.

The other fields for PEC setup on this page correspond to those on the Financial Aid Defaults page.

> **Note**
>
> In the Pell calculation fields, if you select Formula 1 - FA Load or Formula 1 - Full-time, you must populate the Pell Number of Terms field. If you select Formula 3 - FA Load, Formula 3 - Current Load, or Formula 3 — Full-time Load, you must populate the Academic or Non-Standard Base Weeks fields.

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Related Topics

- Building Financial Aid Terms Online
  This section lists common elements and discusses how to:

Defining Aggregate Aid Limit Percentage Maximums and Amounts for Pell Grants

You must define the **Lifetime Eligibility Maximum** percent and the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

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

> **Note**
>
> For a complete description of this page: See Setting Up Aggregate Aid.

Field or Control	Description
First Pell Percentage	This field appears when the **Aggregate Area** has been activated as a Pell Grant. Enter *100.00* to ensure students are fully awarded a Pell1. If you enter any value less than 100.00, students are not fully awarded a Pell1. To calculate a student's remaining eligibility percentage for a Pell1, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 awards) from this field.
Lifetime Eligibility Maximum	This field appears when the **Aggregate Area** has been activated as a Pell Grant and the **Aid Year** is 2013 and beyond. Enter the maximum percentage for a student's Lifetime Pell Eligibility. For example, when the United States Department of Education says that a student cannot exceed 12 full-time semester terms (translated as 600 percent), then you would enter 0600.0000 in this field. An individual student's Lifetime Eligibility Used percentage plus current year system-generated Pell Grant award cannot exceed this maximum percentage.

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Field or Control	Description
Second Pell Percentage	This field appears when the **Aggregate Area** has been activated as a Pell Grant. Enter 150.00 to ensure that students are fully awarded a Pell2. If you enter any value less than 150.00, students are not fully awarded a Pell2. To calculate a student's remaining eligibility percentage for a Pell2, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 and Pell2 awards) from this field. When awarding a Pell2, the system determines if the term being awarded qualifies as a crossover payment period. If the term is a crossover payment period, the system uses the **Use PELL Crossover Logic** setup from the Financial Aid Defaults setup to determine how to award the Pell2 award. See Establishing Defaults. **Note:** The term being awarded should have the start date and end date defined on **Maintain Student FA Term** to determine if crossover payment period criteria has been met. See Building Financial Aid Terms Online.
Maximum Scheduled Pell Amount	Enter the maximum scheduled Pell grant award value as published by ED for the aid year. This value is used by the Packaging routine.
Minimum Scheduled Pell Amount	Enter the minimum scheduled Pell grant award value as published by ED for the aid year. This value is used by the Packaging routine.

Calculating Pell Grants

The section discusses how Pell Grants are calculated and includes example calculations.

> **Note**
>
> The system can award two Pell Grants consecutively by term, First Pell (Pell1) and Second Pell (Pell2), to eligible students in a single aid year. As part of the Pell Eligibility Calculation (PEC), the system determines a student's Maximum (Max) Scheduled Award and uses this value to determine maximum Pell eligibility for the aid year. The system does not consider and does not award Pell2 until the student has been awarded Pell1 in the amount of his or her Max Scheduled Award.

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> **Note**
>
> The system does not attempt to calculate a Pell Grant award for a student who has neither a federal nor an institutional application for the applicable aid year in the system. However, the system does attempt to calculate a Pell Grant award for a student who has an institutional application, but no federal application, for the applicable aid year in the system.

Step 1

The first step for Packaging (Manual Packaging, Auto Packaging, Repackaging, Mass Packaging, or Batch Repackaging) to calculate a student's Pell Grant award is to determine the Pell Eligibility Calculation (PEC) setup values to use. Because PEC setup defaults can be at the program, career, or installation level and can be overridden at the student level, Packaging checks for defaults in the following order to ensure that the proper aid processing rules are used:

1. Student override values.
2. Aid processing rule set associated with the student's program.
3. Aid processing rule set associated with the student's career.
4. Installation defaults specified on the Financial Aid Defaults page

Once PEC values are detected, the checking for defaults is done and those values are used.

Step 2

The second step is to compare the current (system) date to the term start date (earliest session start date) and the financial aid census date. After identifying the current date in relation to these dates, Packaging uses this date to determine which PEC Pell formula and enrollment values to use (Pell Calculation Start, Pell Calculation Midterm, or Pell Calculation Census).

Step 3

The third step is to determine the percentage of the student's **Max Scheduled Award** of Pell Grant award that has been used.

Once the **Max Scheduled Award** has been established, the system calculates the student's remaining Pell eligibility by using both the student's **Percent Scheduled Used** and, for the 2013 aid year and beyond, the **Lifetime Eligibility Used** fields. Both fields are displayed on the **Aggregate Aid Data** page and are populated by the NSLDS Data Push process. The pushed values can be manually overridden.

> **Note**
>
> You must regularly push NSLDS data to the Aggregate Tables in order for Packaging to calculate accurately the student's remaining Pell eligibility.

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> **Note**
>
> As of the 2013 aid year, the NSLDS Aggregate Push routine updates the Pell Aggregate Area for the 2013 aid year and beyond with the NSLDS Pell Lifetime Eligibility Used percentage value reported on either a Financial Aid History File or Transfer Student Monitoring data file. Excluded from this value is any current year NSLDS Pell transaction that matches any internally awarded Pell Grants based on school code match. *Therefore*, to ensure that the most current and accurate Pell Lifetime Eligibility Used value is evaluated, you should regularly load and push NSLDS data sourced from the NSLDS Financial Aid History or Transfer Student Monitoring data file.

To calculate the student's remaining Pell Grant eligibility, the system uses the lower percentage of (a) Lifetime Eligibility Maximum percent minus the student's **Lifetime Eligibility Used** percent and (b) **First Pell Percentage** minus the student's **Percent Scheduled Used** value. The lower of these two percentages is applied to the **Max Scheduled Award**.

Access the Aggregate Aid Data page (**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **Update Incoming Aggregates**, and then **Aggregate Aid Data**).

> **Note**
>
> For a complete description of the Aggregate Aid Data page: See Managing Aggregate Aid.

Field or Control	Description
Percent Scheduled Used and **Override**	Displays the percentage of a student's Pell Grant Maximum (Max) Scheduled Award used at prior institutions from NSLDS or, if overridden, manually populated by the user. Valid values are 000.0 to 150.0. The field can exceed 100.0 when a student has received the Max Scheduled Award for first Pell Grant (Pell1) plus a partial or Max Scheduled Award for second Pell Grant (Pell2) at prior institutions. Packaging always uses the Percent Scheduled Used as part of its Pell eligibility determination regardless of the designated Aggregate Source (NSLDS or PS). Select the **Override** check box and manually enter a value to override **Percent Scheduled Used**.

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Field or Control	Description
Total % Used	Displays the sum of **Percent Scheduled Used** and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 150.0. **Note:** The system uses these internal fields (not displayed on any pages) to calculate **Total % Used**: Max Scheduled Award (full-time, full-year Pell Grant award based on Pell COA and SAI), student's remaining Pell Grant eligibility, and Max Scheduled Award minus the lesser of Lifetime Eligibility Used or Percent Scheduled Used.
Lifetime Eligibility Used and **Override**	Displays the percentage of a student's Pell Grant received over his or her lifetime as reported from NSLDS or, if overridden, manually populated by the user. Valid values are 0000.0000 to 9999.9999. This field is populated by the Aggregate Push routine. Select the **Override** check box and manually enter a value to override. **Lifetime Eligibility Used** is evaluated against the corresponding Pell Aggregate Aid Limit, Lifetime Eligibility Maximum Percent setup value as one of the factors when determining a Pell Grant award. See Setting Up Aggregate Aid.

> **Note**
>
> Pell Grant eligibility always uses NSLDS aggregate values.

Step 4

The fourth step is to use the identified Pell Grant formula with the appropriate Enrollment Intensity, the student's Maximum Scheduled Award, the appropriate weeks of instruction or Pell Number of Terms, and the student's Total Percent Used (of Pell) to calculate the Pell Grant award term by term.

The Packaging routine repeats this process for each term in the student's academic program, and adds the individual term amounts to determine the student's annual Pell Grant award.

Pell Grant Disbursement Rounding

Financial aid award disbursement amounts, including Pell Grants, are determined in part by the Rounding Option selected in Financial Aid Item Type setup. For complete information on Financial Aid Item Type setup, see Defining Financial Aid Item Types.

If the Financial Aid Item Type Rounding Option attribute *equals* None, then no rounding takes place, and Pell Grant award disbursement amounts are in U.S. dollars and cents. If the Rounding Option attribute *does not equal* None, then the following Pell Rounding Rules are applied regardless of the settings of Rounding Option, Round Direction, or Award Remainder Rule.

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- If the number of terms is *even,* the system alternately rounds term amounts up or down based on how the first term amount is rounded and disregards the decimal amount for all other terms. For example:

  If the first term decimal amount is equal to or greater than $0.50 USD, then the first term amount is rounded up, and all remaining terms follow a rounding treatment of down, up, down, etc. regardless of their decimal amounts.

  If the first term decimal amount is less than $0.50 USD, then the first term amount is rounded down, and all remaining terms follow a rounding treatment of up, down, up, etc. regardless of their decimal amounts.

- If the number of terms is *three,* the system rounds to one direction, up or down, for the first two terms, and to the other direction for the third term. Whether the system initially rounds up or down for the first two terms depends on the decimal amount of the first term only; it disregards the decimal amount for the third term and rounds up or down based on the first two terms.

  If the first term decimal amount is equal to or greater than .50 USD, then the first term amount is rounded up, the second term amount is rounded up, and the third term amount is rounded down.

  If the first term decimal amount is less than .50 USD, then the first term amount is rounded down, the second term amount is rounded down, and the third term amount is rounded up.

- When determining the rounding methodology, the system only includes terms where the scheduled disbursement's decimal amount is greater than zero to determine whether there is an even number of terms or not. In other words, terms with a scheduled disbursement amount ending in whole dollars are not considered part of the term count when assessing terms eligible for rounding.

- Disbursement protection is not used with Pell Grant awards. The system disregards the disbursement protection attribute of the Financial Aid Item Type setup for Pell Grant item types and always recalculates the Pell Grant award and scheduled disbursements without regard to what has been originated or disbursed.

  If the originated or disbursed amount exceeds the revised calculation by 1.00 USD, the disbursement process takes 1.00 USD back. You should consider a change origination with Common Origination and Disbursement for the recalculated, lesser amount.

  If the originated or disbursed amount is less than the revised calculation by 1.00 USD, the disbursement process disburses an additional 1.00 USD for the term. You should consider a change origination with Common Origination and Disbursement for the recalculated, greater amount.

  If the originated or disbursed amount contained cents and the revised calculation no longer contains cents in order for the total Pell Grant award (sum of all scheduled disbursements) to result in whole dollars, you should do one of these 3 things:

  1. Turn rounding off at the Pell Grant item type level so subsequent disbursements contain cents.
  2. Perform a custom split to reflect cents in subsequent disbursement terms.
  3. Handle cents through professional judgment.

If you choose option 1 and you have already disbursed your Pell amounts with cents, you should consider continuing to award in dollars and cents (Pell Item Type Rounding Option = None) for the duration of the award year.

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Pell Grant Point–in–Time Amounts

A Pell Grant can be calculated differently based on the PEC setup and different points in time in relation to the term start date:

- Before term start date.
- Mid-term prior to term census date.
- On or after term census date.

A student attends a semester-based institution, and is an undergraduate in the liberal arts academic program. Neither the student's program nor career have defaults that differ from the installation defaults. The student's annual Pell COA is 5450.00 USD and the primary SAI is 00154; resulting in a Max Scheduled Award of 5,200.00 USD. The Pell Number of Terms is 2, and Enrollment Intensity is 100% for both terms.

The student is first awarded a Pell Grant on March 1, 2024. To calculate the student's Pell Grant amount, the Packaging routine first determines whether PEC setup values exist at the student override level and then the academic program level for the student. After the routine determines that no aid processing rule set is attached to the liberal arts academic program, it checks for career level defaults. Because no aid processing rule set is assigned to the undergraduate career, it uses the installation defaults. The Pell calculation fields on the Financial Aid Defaults page have the following values:

Field	Value
Pell Calculation Start	Formula 1 — Full-time
Pell Calculation Midterm	Formula 1 — Full-time
Pell Calculation Census	Formula 1 — FA Load

Packaging compares the current date (March 1, 2009) against the term start date and census date to determine which enrollment value to use when calculating the student's Pell Grant:

Term	Term Start Date	FA Census Date
Fall	09/17/24	10/20/24
Spring	01/23/25	03/10/25

Because the system date is before the term start date for both semesters, Packaging uses the Pell Calculation Start value for enrollment, *Formula 1 Full-time*.

This table shows how the student's Pell Grant award changes as you recalculate the student's Pell Grant eligibility at different points in the aid year.

Current Date	Pell Calculation Field Used - Fall	Pell Calculation Field Used - Spring
03/01/24	Pell Calculation Start Formula 1 — Full-time	Pell Calculation Start Formula 1 — Full-time
09/20/24	Pell Calculation Mid-term Formula 1 — Full-time	Pell Calculation Start Formula 1 — Full-time
10/25/24	Pell Calculation Census Formula 1 — FA Load	Pell Calculation Start Formula 1 — Full-time

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Current Date	Pell Calculation Field Used - Fall	Pell Calculation Field Used - Spring
01/30/25	Pell Calculation Census Formula 1 — FA Load	Pell Calculation Start Formula 1 — Full-time
03/25/25	Pell Calculation Census Formula 1 — FA Load	Pell Calculation Census Formula 1 — FA Load

See Defining Pell Eligibility Calculation (PEC) Setup.

Pell Grants for Non-standard Terms and Two Pell Grants in an Aid Year Examples

To support Leading or Trailing Summer terms, the system can package a Pell Grant across both Academic and Non-Standard award periods. You should consider carefully the Disbursement Plan/Split Code being used to award Pell1 and Pell2. The system uses Disbursement Plans to determine for which terms to consider the student's Pell eligibility, but it does not use the Split Code nor Split Code Formulas as part of its distribution spread determination. Instead, the system uses either:

1. Pell Number of Terms.
2. Academic plus Non-Standard Base Weeks to determine each term's award amount and how the award is spread across the enrolled terms.

> **Note**
>
> Although not used for Pell Grant awarding, the system still requires that you specify default Split Code and Split Code Formula values so that the fields are populated. These values are not used to distribute the Pell award into scheduled disbursements.

If your institution intends to award Pell Grants in either the Leading or Trailing Summer, you need to create Disbursement Plans that encompass all terms in which the student may receive a Pell Grant.

Similar to awarding Leading or Trailing Summer terms, if you intend to award a Pell2 award in the succeeding term following a Pell1 award, you should use the same Disbursement Plan/ Split Code pattern for both awards. Inherent logic in the system ensures that, based on the Disbursement Plan/Split Code being used, Packaging inserts a Pell2 award in the next available term following a Pell1 award.

The system awards Pell1 and Pell2 in consecutive terms up to the maximum Pell eligibility based on the student's enrollment for that term.

Pell Grant Packaging Error Messages

The following table lists and explains possible Pell Grant Packaging error messages:

Message Number	Message Text
9022	PELL -Invalid Title IV eligibility indicator
9023	PELL - Not Title IV eligible
9026	PELL -Invalid NSLDS level

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Message Number	Message Text
9027	PELL -Student is not an undergraduate, not PELL eligible
9033	PELL -Student has Bachelors degree, not PELL eligible
9136	Student Base Weeks or term count found to be 0 during PELL calculation
9148	PELL award cannot be assigned; there is no matching disbursement for term
9149	Not PELL eligible based on combination PELL Index and PELL COA
9150	Invalid FA Load Code; Must have a value of 'F', 'T', 'H', 'L' or 'N'
9151	Item Type, Term, Aggregate, and/or Plan limits are less than PELL award
9152	PELL Index (Federal SAI) exceeds PELL Index maximum
9161	Student Enrollment Weeks (or terms) total exceeds Base Weeks (or term count).
9183	The student cannot receive Fedearl aid since the SAI status is = 'Z' (Provisional)
9185	Calculated PELL award exceeds aggregate eligibility; award rejected.
9214	Not Pell Eligible: The Student is a Graduate Student
9217	Federal SAI exceeds Pell Maximum
9218	Cannot Award Federal FA Item Types; SAI Status = 'R' Rejected
9234	For 2010, Pell Calculation Start, Midterm and Census date entries are invalid
9236	Not eligible for 2nd Pell award since 1st Pell award was not awarded at 100%
9237	Not eligible for 2nd Pell award; disbursement terms overlap with 1st Pell award
9238	Ineligible for Pell award; Lifetime Eligibility Percentage has been reached.
9239	Pell award has been reduced by student's remaining Lifetime Eligibility.
9405	PELL award reduced by Aggregate limits
9244	Regular Pell Disbursement Schedules have not been loaded into the system for this Aid Year. Therefore, an estimated award is assigned using the previous Aid Year’s Regular Pell Disbursement Schedule.
9249	Alternate Pell Disbursement Schedules have not been loaded into the system for this Aid Year. Therefore, an estimated award is assigned using the previous Aid Year’s Alternate Pell Disbursement Schedule.
9251	No Pell Awarded in Crossover Term.

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Message Number	Message Text
9253	Not eligible for an Additional Pell due to an ineligible FA Load.
9254	Not eligible for Pell grant due to cumulative load exceeding 100%.

Repackaging Pell Grants

If your system

- has existing awards with a Disbursement Plan/Split Code that includes only Academic terms; and
- you want to tie these existing awards to a Disbursement Plan/Split Code that spans both the Academic and Non-Standard terms,

you cannot use a repackaging plan that incorporates the Repackaging Rule Validate Item Type for Pell item types. This is because Validate Item Type always uses the Disbursement Plan/Split Code tied to the existing award. You can use the Repackaging Rule Use Original Plan to repackage Pell Item Types that require a Disbursement Plan/Split Code change. If your institution does not intend to award Pell Grants in Leading or Trailing Summer terms, you can use the Repackaging Rule Validate Item Type for Pell item types.

Awarding Pell Grants Manually

If you manually award a Pell Grant that *exceeds* the Max Scheduled Award, the system reduces the award down to the Max Scheduled Award amount. Conversely, if you manually award a Pell Grant *for less than* the Max Scheduled Award, the system allows the award.

> **Note**
>
> When entering a Pell Grant manually on the Student Aid Package page, you can leave the award amount at zero. When you click the Validation button, the system automatically calculates the Pell Grant award according to the Pell eligibility calculation defined in your setup.

Awarding Pell Grants using Professional Judgment

Any amount of Pell Grant you award using Professional Judgment is accepted. Pell1 or Pell2 can exceed the Max Scheduled Award, the Total Percent Used value, and other Pell Grant awarding validations.

Reinstating a Canceled Pell Grant Award

Before reinstating a previously canceled Pell Grant, you must change the custom split code from *XX* to a valid disbursement split code for the student. You can then click the **Validation** button to recalculate the Pell Grant amount. After you recalculate the Pell Grant amount, you must remember to post it before leaving the award entry page.

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Awarding Pell Grants for Post-Baccalaureate Teaching Certificate Candidates

A student who has earned a bachelor's degree and is pursuing an initial teaching certification or licensing credential that does not lead to a graduate degree is eligible for a Pell Grant for that aid year. The Packaging process determines the eligibility for this type of student by evaluating the following fields:

Record	Field	Description
ISIR_STUDENT	DEGREE_CERTIF	The degree or certification the student is pursuing. The student must be pursuing a teaching credential.
ISIR_STUDENT	FIRST_BACH_DEGREE	Indicates whether the student has a bachelor's degree. The student can have earned a bachelor's degree.
STUDENT_FA_TERM	NSLDS_LOAN_YEAR	The NSLDS loan year for the student. Eligible students cannot be graduate students.

If a student is pursuing a teaching credential and has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging evaluates the student for a Pell Grant.

If a student is *not* pursuing a teaching credential but has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging does *not* evaluate the student for a Pell Grant.

Awarding Pell Grants for the 2022-2023 and 2023-2024 Aid Years

This section provides an overview of Pell Grant awarding and discusses how to:

- Define Pell eligibility calculation setup.
- Define Aggregate Aid Limit Percentage Maximums for Pell Grant.
- Calculate Pell Grants.
- Package Pell Grants Using Pell Table Enablement Tables
- Repackage Pell Grants.
- Manually award Pell Grants.
- Award Pell Grants using professional judgment.
- Reinstate a cancelled Pell Grant award.
- Award Pell Grants for post-baccalaureate teaching certificate candidates.

Understanding Pell Grant Awarding

The Pell Grant awarding functionality automatically calculates a Pell Grant award based on a student's:

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- Maximum Scheduled Award
- Pell Grant Formula and Enrollment
- Total Percent Used
- Lifetime Eligibility Used

Maximum Scheduled Award

The system determines a student's maximum scheduled Pell Grant (full-time, full-year Pell Grant award) by using:

- Expected Family Contribution (EFC)

  The student's 9–month EFC from a valid Institutional Student Information Report (ISIR)

- Pell Grant Cost of Attendance (COA)

  The student's Pell COA or Pell COA for Less-Than-Half-Time (LTHT)

> **Note**
>
> If the student is enrolled only in terms tied to the Academic Award Period, Packaging uses the Academic Pell COA for determining Pell Grant awards.
>
> If the student is enrolled in terms tied to both the Academic and Non-Standard Award Periods, Packaging uses the Academic Pell COA for determining Pell Grant awards.
>
> If the student is enrolled only in terms tied to Non-Standard Award Period, Packaging uses the Non-Standard Pell COA for determining Pell Grant awards.

See Defining Budget Components.

The system uses the student's EFC and Pell COA to determine the student's maximum scheduled Pell Grant award from the U.S. Department's Full-time Pell Grant payment schedule for the appropriate aid year.

Pell Grant Formula and Enrollment

These Pell Grant Formula options are available:

- Formula 1 — FA Load
- Formula 1 — Full-time
- Formula 3 — FA Load
- Formula 3 — Current Load
- Formula 3 — Full-time

Among the formula options, there are three enrollment values used:

- FA Load

  The Financial Aid Term build process determines the student's FA Load using the units in the **FA Taken** field. The **FA Load** field can be locked using census-date locking. If you use census-date locking, you may want to use the census date locked value (FA Load) for any Pell recalculations that occur after the financial aid census date.

- Current Load

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Current Load calculates the student's enrollment load using the units from sessions the student is currently enrolled **(In Progress** value from FA Term) in as well as sessions within the term that the student has already completed **(Completed** value from FA Term). This field enables you to calculate the enrollment load of Open Entry/Open Exit students more accurately.

- Full-time

  The student's full-time enrollment is assumed.

You can choose to calculate the student's Pell Grant eligibility using different default enrollment values for different points in time in relation to the term:

- before the term's start date,
- on or after the term's start date but before the financial aid census date, and
- on or after the financial aid census date.

Having different values for these three points in time gives you flexibility in calculating Pell Grant awards. For example, for Formula 1, you can calculate a student's Pell Grant using a projected full-time enrollment value for the period prior to the term start date. Then when the student's term begins, you can recalculate the student's Pell Grant award using the student's actual enrollment (FA Load).

> **Note**
>
> If a term does not have a financial aid census date established, the Pell recalculation process uses the academic census date (defined in Student Records).

See Defining Pell Eligibility Calculation (PEC) Setup.

See Calculating Pell Grants.

Total Percent Used

The amount of Pell Grant the system can award a student also takes into account the percentage of a student's maximum scheduled Pell Grant award that has already been used. The system uses the **Percent Scheduled Used** from a student's incoming Aggregate Aid Data and any existing Pell Grant awards packaged by the system for the aid year to calculate the Total Percent Used.

The **Percent Scheduled Used** is populated by the NSLDS Data Push process but can also be overridden manually.

With the implementation of Year Round Pell beginning in the 2017-2018 award year, students can receive up to 150 percent of their Federal Pell Grant Scheduled Award in a single award year. You must define the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

See Defining Aggregate Aid Limit Percentage Maximums for Pell Grants.

See Calculating Pell Grants.

Lifetime Eligibility Used

The system takes into account the total amount of Pell Grant a student has used across all aid years in pursuit of an undergraduate degree. The system uses **Lifetime Eligibility Used** and **Percent Scheduled Used** from a student's incoming Aggregate Aid Data and any existing Pell

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Grant awards packaged by the system for the aid year to determine the student's remaining Pell Grant eligibility.

Defining Pell Eligibility Calculation (PEC) Setup

You must complete the Pell Eligibility Calculation (PEC) setup for your Pell Grants to be properly calculated. PEC setup is done at the institution defaults level and be overridden at the academic career, academic program, and student levels.

The fields that define your PEC setup are:

- **Academic Base Weeks**
- **Non-Standard Base Weeks**
- **Pell 3 Academic Weeks Only**
- **Pell Calculation Start**
- **Pell Calculation Midterm**
- **Pell Calculation Census**
- **Pell Number of Terms**

Defining PEC at the Institution Level

Access the Financial Aid Defaults page (**Set Up SACR**, and then **Install**, and then **Financial Aid Installation**, and then **Financial Aid Defaults**).

Because the values you enter on this page are used as installation level defaults, they should be the values you want to use for most of your undergraduate programs.

> **Note**
>
> For a complete description of this page: See Establishing Defaults.

Field or Control	Description
Academic Base Weeks	Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated expected family contribution (EFC). Valid values are 0.0 to 99.9.
Non-Standard Base Weeks	Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions. Valid values are 0.0 to 99.9.

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Field or Control	Description
Pell 3 Academic Weeks Only	Select so the Pell Grant calculation uses only Academic Base Weeks as the Academic Program's Weeks of Instruction for Formula 3. If not selected, the Pell Grant calculation sums the Academic Base Weeks and Non-Standard Base Weeks together to determine the Academic Program's Weeks of Instruction. **Note:** An Academic Program's Weeks of Instruction serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term when calculating Pell Grant eligibility for Formula 3 — FA Load, Formula 3 — Current Load, and Formula 3 — Full-time Load.

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Field or Control	Description
Pell Calculation Start	Enter the calculation mode to use for Pell calculations made before the student's academic term start date: *Formula 1 — FA Load*: Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses the student's actual FA Load for each term. *Formula 1 — Full-time*: Directs the Pell calculation to divide the Scheduled Pell Grant by the **Pell Number of Terms** and uses full-time as the student's FA Load for each term. *Formula 3 — Current Load*: Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the **Current Load** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The **Current Load** value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term. *Formula 3 — FA Load*: Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the **FA Load** value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The **FA Load** value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load. *Formula 3 — Full-time Load*: Directs the Pell calculation to sum the **Academic Base Weeks** and **Non-Standard Base Weeks** values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility.
Pell Calculation Midterm	Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

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Field or Control	Description
Pell Calculation Census	Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.
Pell Number of Terms	Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no automatic cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using *Formula 1 - FA Load* or *Formula 1 - Full-time* Pell calculation values. If you select *Formula 1 - FA Load* or *Formula 1 - Full-time,* you must populate the Pell Number of Terms field. Valid values are *0 to 99.*
Use PELL Crossover Logic	Select this check box if you want the system to a check the summer/crossover term to determine if a Pell Grant award for that term would be higher if it is awarded using the *Additional* Pell Item Type for the current Aid Year (e.g. Aid Year 2018) or the *Initial* Pell Item Type in the forward Aid Year (e.g. Aid Year 2019). If selected and the award would be higher for the forward Aid Year, the system awards zero Pell Grant for the summer/crossover term under the Additional Pell item type the current Aid Year. If the Pell Grant award for the summer/crossover term is higher using the current Aid Year, it will award the amount as Additional Pell. If *not* selected, the system awards Pell Grant for the summer/crossover term as Additional Pell in the current Aid Year without additional checks against the forward Aid Year.

Overriding PEC at the Career Level

Access the Aid Processing Rule Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Processing Rule Setup**) and the Valid Careers for Aid Year page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Careers for Aid Year**).

> **Note**
>
> For a complete description of the Aid Processing Rule Setup page: See Creating Aid Processing Rule Sets.

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> **Note**
>
> For a complete description of the Valid Careers for Aid Year page: See Listing Valid Careers for the Aid Year.

For careers that require a different PEC setup than specified on the Financial Aid Defaults page, create an aid processing rule set with the required PEC setup for those careers. You create aid processing rule sets on the Aid Processing Rule Setup page; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you assign aid processing rule sets on the Valid Careers for Aid Year page to only those careers that need a PEC setup that differs from the installation level default. If two careers require the same PEC setup (which differs from the installation level default setup), create only one aid processing rule set and select it for each career.

> **Note**
>
> You do not need to create an aid processing rule set for every career. You do not need to assign an aid processing rule set to every career on the Valid Careers for Aid Year page. If you do not specify an aid processing rule set on the Valid Careers for Aid Year page, the Packaging routine uses the installation defaults for PEC.

For example, you may want to create an aid processing rule set for a career where the Base Weeks of Instruction is greater or less than the Base Weeks of instruction at the installation default level. On the Aid Processing Rule Setup page, you would specify the values for the weeks of instruction in the **Academic Base Weeks** and **Non-Standard Base Weeks** fields for these careers. Fill out all fields in the aid processing rule set.

Overriding PEC at the Program Level

Access the Aid Processing Rule Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Aid Processing Rule Setup**) and the Valid Programs for Aid Year and Career page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Aid Year**, and then **Valid Programs for Aid Year**).

> **Note**
>
> For a complete description of the Aid Processing Rule Setup page: See Creating Aid Processing Rule Sets.

> **Note**
>
> For a complete description of the Valid Programs for Aid Year and Career page: See Defining Valid Programs for Aid Year and Career.

For academic programs that require a different PEC setup than specified at the career or installation level, create an aid processing rule set with the required PEC setup; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you

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assign aid processing rule sets to only those academic programs that require a PEC setup different from the career or installation level default on the Valid Programs for Aid Year page. If two academic programs require the same PEC setup, create only one aid processing rule set and assign it to both academic programs.

For programs, the Pell number of terms that you enter on the Aid Processing Rule Setup page must match the Pell number of terms at the career level.

> **Note**
>
> You do not need to create an aid processing rule set for every career/program combination. You do not need to enter every program on the Valid Programs for Aid Year page. If you do not specify an aid processing rule set on the Valid Programs for Aid Year page, the Packaging routine uses the career or installation level defaults for PEC. For example, if an Academic Program supports a Leading Summer term, you want to create a unique PEC that distinguishes it from an Academic Program that does not support a Summer Term

Overriding PEC at the Student Level

Access a student's Pell Calculation Eligibility Student Override page **(Financial Aid**, and then **View Packaging Status Summary)** and click on the Pell Calculation Override link after querying a student.

> **Note**
>
> For a complete description of the Pell Calculation Eligibility Student Override page: See Overriding Pell Eligibility Calculation Setup Values.

Field or Control	Description
Status	Select *Active* to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods. Select *Inactive* to use the PEC setup at FA installation, career, or program level.

The other fields for PEC setup on this page correspond to those on the Financial Aid Defaults page.

> **Note**
>
> In the Pell calculation fields, if you select Formula 1 - FA Load or Formula 1 - Full-time, you must populate the Pell Number of Terms field. If you select Formula 3 - FA Load, Formula 3 - Current Load, or Formula 3 — Full-time Load, you must populate the Academic or Non-Standard Base Weeks fields.

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Related Topics

- Overriding Census Date Locking
  Access the FA Term Census Date Locking page (click the **Census Date** link on the FA Term page).

Defining Aggregate Aid Limit Percentage Maximums for Pell Grants

You must define the **Lifetime Eligibility Maximum** percent and the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

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

> **Note**
>
> For a complete description of this page: See Creating Aggregate Aid Limits.

Field or Control	Description
First Pell Percentage	This field appears when the **Aggregate Area** has been activated as a Pell Grant. Enter *100.00* to ensure students are fully awarded a Pell1. If you enter any value less than 100.00, students are not fully awarded a Pell1. To calculate a student's remaining eligibility percentage for a Pell1, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 awards) from this field.
Lifetime Eligibility Maximum	This field appears when the **Aggregate Area** has been activated as a Pell Grant and the **Aid Year** is 2013 and beyond. Enter the maximum percentage for a student's Lifetime Pell Eligibility. For example, when the United States Department of Education says that a student cannot exceed 12 full-time semester terms (translated as 600 percent), then you would enter 0600.0000 in this field. An individual student's Lifetime Eligibility Used percentage plus current year system-generated Pell Grant award cannot exceed this maximum percentage.

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Field or Control	Description
Second Pell Percentage	This field appears when the **Aggregate Area** has been activated as a Pell Grant. Enter 150.00 to ensure that students are fully awarded a Pell2. If you enter any value less than 150.00, students are not fully awarded a Pell2. To calculate a student's remaining eligibility percentage for a Pell2, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 and Pell2 awards) from this field. When awarding a Pell2, the system determines if the term being awarded qualifies as a crossover payment period. If the term is a crossover payment period, the system uses the **Use PELL Crossover Logic** setup from the Financial Aid Defaults setup to determine how to award the Pell2 award. See Establishing Defaults. **Note:** The term being awarded should have the start date and end date defined on **Maintain Student FA Term** to determine if crossover payment period criteria has been met. See Building Financial Aid Terms Online.

Calculating Pell Grants

The section discusses how Pell Grants are calculated and includes example calculations.

> **Note**
>
> The system can award two Pell Grants consecutively by term, First Pell (Pell1) and Second Pell (Pell2), to eligible students in a single aid year. As part of the Pell Eligibility Calculation (PEC), the system determines a student's Maximum (Max) Scheduled Award and uses this value to determine maximum Pell eligibility for the aid year. The system does not consider and does not award Pell2 until the student has been awarded Pell1 in the amount of his or her Max Scheduled Award.

> **Note**
>
> The system does not attempt to calculate a Pell Grant award for a student who has neither a federal nor an institutional application for the applicable aid year in the system. However, the system does attempt to calculate a Pell Grant award for a student who has an institutional application, but no federal application, for the applicable aid year in the system.

Step 1

The first step for Packaging (Manual Packaging, Auto Packaging, Repackaging, Mass Packaging, or Batch Repackaging) to calculate a student's Pell Grant award is to determine the Pell Eligibility Calculation (PEC) setup values to use. Because PEC setup defaults can be at

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the program, career, or installation level and can be overridden at the student level, Packaging checks for defaults in the following order to ensure that the proper aid processing rules are used:

1. Student override values.
2. Aid processing rule set associated with the student's program.
3. Aid processing rule set associated with the student's career.
4. Installation defaults specified on the Financial Aid Defaults page

Once PEC values are detected, the checking for defaults is done and those values are used.

Step 2

The second step is to compare the current (system) date to the term start date (earliest session start date) and the financial aid census date. After identifying the current date in relation to these dates, Packaging uses this date to determine which PEC Pell formula and enrollment values to use (Pell Calculation Start, Pell Calculation Midterm, or Pell Calculation Census).

Step 3

The third step is to determine the percentage of the student's **Max Scheduled Award** of Pell Grant award that has been used.

Once the **Max Scheduled Award** has been established, the system calculates the student's remaining Pell eligibility by using both the student's **Percent Scheduled Used** and, for the 2013 aid year and beyond, the **Lifetime Eligibility Used** fields. Both fields are displayed on the **Aggregate Aid Data** page and are populated by the NSLDS Data Push process. The pushed values can be manually overridden.

> **Note**
>
> You must regularly push NSLDS data to the Aggregate Tables in order for Packaging to calculate accurately the student's remaining Pell eligibility.

> **Note**
>
> As of the 2013 aid year, the NSLDS Aggregate Push routine updates the Pell Aggregate Area for the 2013 aid year and beyond with the NSLDS Pell Lifetime Eligibility Used percentage value reported on either a Financial Aid History File or Transfer Student Monitoring data file. Excluded from this value is any current year NSLDS Pell transaction that matches any internally awarded Pell Grants based on school code match. *Therefore*, to ensure that the most current and accurate Pell Lifetime Eligibility Used value is evaluated, you should regularly load and push NSLDS data sourced from the NSLDS Financial Aid History or Transfer Student Monitoring data file.

To calculate the student's remaining Pell Grant eligibility, the system uses the lower percentage of (a) Lifetime Eligibility Maximum percent minus the student's **Lifetime Eligibility Used** percent and (b) **First Pell Percentage** minus the student's **Percent Scheduled Used** value. The lower of these two percentages is applied to the **Max Scheduled Award**.

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Access the Aggregate Aid Data page (**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **Update Incoming Aggregates**, and then **Aggregate Aid Data**).

> **Note**
>
> For a complete description of the Aggregate Aid Data page: See Updating Aggregate Aid Information.

Field or Control	Description
Percent Scheduled Used and **Override**	Displays the percentage of a student's Pell Grant Maximum (Max) Scheduled Award used at prior institutions from NSLDS or, if overridden, manually populated by the user. Valid values are 000.0 to 150.0. The field can exceed 100.0 when a student has received the Max Scheduled Award for first Pell Grant (Pell1) plus a partial or Max Scheduled Award for second Pell Grant (Pell2) at prior institutions. Packaging always uses the Percent Scheduled Used as part of its Pell eligibility determination regardless of the designated Aggregate Source (NSLDS or PS). Select the **Override** check box and manually enter a value to override **Percent Scheduled Used**.
Total % Used	Displays the sum of **Percent Scheduled Used** and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 150.0. **Note:** The system uses these internal fields (not displayed on any pages) to calculate **Total % Used**: Max Scheduled Award (full-time, full-year Pell Grant award based on Pell COA and EFC), student's remaining Pell Grant eligibility, and Max Scheduled Award minus the lesser of Lifetime Eligibility Used or Percent Scheduled Used.
Lifetime Eligibility Used and **Override**	Displays the percentage of a student's Pell Grant received over his or her lifetime as reported from NSLDS or, if overridden, manually populated by the user. Valid values are 0000.0000 to 9999.9999. This field is populated by the Aggregate Push routine. Select the **Override** check box and manually enter a value to override. **Lifetime Eligibility Used** is evaluated against the corresponding Pell Aggregate Aid Limit, Lifetime Eligibility Maximum Percent setup value as one of the factors when determining a Pell Grant award. See Creating Aggregate Aid Limits.

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> **Note**
>
> Pell Grant eligibility always uses NSLDS aggregate values.

Step 4

The fourth step is to use the identified Pell Grant formula with the appropriate Pell Grant Payment Schedule based on the enrollment load value, the student's Maximum Scheduled Award, the appropriate weeks of instruction or Pell Number of Terms, and the student's Total Percent Used (of Pell) to calculate the Pell Grant award term by term.

The Packaging routine repeats this process for each term in the student's academic program, and adds the individual term amounts to determine the student's annual Pell Grant award.

Pell Grant Formula Examples

The next four sections provide of examples of the Pell Formula calculations supported by the system:

- Formula 1 — FA Load
- Formula 1 — Full-Time
- Formula 3 — FA Load
- Formula 3 — Current Load
- Formula 3 — Full-time

See Defining Pell Eligibility Calculation (PEC) Setup.

Formula 1 — FA Load

The system divides the Pell Grant award by the Pell Number of Terms. It uses the student's FA Load value for each term to determine which Pell Grant schedule to use.

Pell COA = 5000.00 USD

EFC =02350

Max Scheduled Award: 3000.00 USD

Pell Number of Terms: 2

Summer: Leading

FA Load Term 1: 3/4 (Summer Term)

FA Load Term 2: 3/4

FA Load Term 3: 3/4

Annual Award: 3000.00 USD

Term 1 Actual Award: 2250.00 USD / 2 = 1125.00 USD

Term 2 Actual Award: 2250.00 USD / 2 = 1125.00 USD

Term 3 Actual Award: 750.00

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The Term 3 Actual Award is calculated like this: (2250.00 USD / by 2 = 1125.00 USD, THEN reduced to remaining eligibility: 3000.00 USD (Annual Award) minus 2250.00 USD (combined Term 1 and Term 2 Actual Awards) equals 750.00 USD.

Formula 1 - Full-Time

The system divides the Max Scheduled Award (full-time, full-year) by the Pell Number of Terms.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Pell Number of Terms: 2

Summer: Trailing

FA Load Term 1: FT (Summer Term)

FA Load Term 2: FT

FA Load Term 3: FT

Annual Award: 3000.00 USD

Term 1 Actual Award: 3000.00 USD / 2 = 1500.00 USD

Term 2 Actual Award: 3000.00 USD / 2 = 1500.00 USD

Term 3 Actual Award: 0.00 USD

Student used entire Max Scheduled Award in Terms 1 and 2, leaving no remaining eligibility for Term 3.

Formula 3 - FA Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — FA Load uses the FA Load from FA Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 34

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

FA Load Term 1: 3/4 (Summer Term)

FA Load Term 2: FT

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FA Load Term 3: FT

Term 1 Actual Award: 12 / 34 x 2250.00 USD = 794.03 USD

Term 1 Actual Award: 10 / 34 x 3000.00 USD = 882.30 USD

Term 1 Actual Award: 12 / 34 x 3000.00 USD = 1058.70 USD

Annual Award: 2735.03

Term 1 disb: 794.03 USD

Term2 disb: 882.30 USD

Term 3 disb: 1058.70 USD

Formula 3 - Current Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — Current Load uses the Current Load from FA Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility. The Current Load value uses the number of units that the student is currently enrolled in (Financial Aid, Financial Aid Term, Maintain Student FA Term, Statistics tab, Session Detail box, In Progress field) plus the number of units from completed sessions in the term to determine the student's load for the term.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 34

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

FA Load Term 1: HT (Summer Term)

FA Load Term 2: 3/4

FA Load Term 3: HT

Term 1 Actual Award: 12 / 34 x 1500.00 USD = 529.35 USD

Term 2 Actual Award: 10 / 34 x 2250.00 USD = 661.73 USD

Term 3 Actual Award: 12 / 34 x 1500.00 USD = 529.35 USD

Annual Award: 1,720.43

Term 1 disb: 529.35 USD

Term 2 disb: 661.73 USD

Term 3 disb: 529.35 USD

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Formula 3 - Full-time Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — Full—time Load uses Full-time as the FA Load Value to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 36

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

Ignore student's actual enrollment and use Full-time Load for all terms

Term 1 Actual Award: 12 / 36 x 3000.00 USD = 1000.00 USD

Term 2 Actual Award: 10 / 36 x 3000.00 USD = 833.33 USD

Term 3 Actual Award: 12 / 36 x 3000.00 USD = 1000.00 USD

Annual Award: 2833.33 USD

Lifetime Eligibility Used Examples

Beginning the 2013 aid year, a student may receive a maximum of 6 years of Pell Grant awards over the course of pursuing an undergraduate degree. This is measured by a cumulative percentage of disbursed Lifetime Pell Grant awards (represented as Lifetime Eligibility Used, up to 600 percent).

When evaluating Lifetime Eligibility Used, Packaging always reviews the relationship between (annual) Percent Scheduled Used value and the Lifetime Eligibility Used Percent and awards the lesser of the two values. This is to ensure that the system does not overaward the student a Pell Grant from either an annual limit perspective *or* a lifetime limit perspective.

Example 1

1. Student's remaining Percent Scheduled Used is 50 percent (Pell1 maximum of 100 percent minus 50 Percent Scheduled Used equals a delta of 50 percent).
2. Student's remaining Lifetime Eligibility is 75 percent (Lifetime Eligibility Percent Maximum of 600 percent minus 525 percent Lifetime Eligibility Used equals a delta of 75 percent).
3. Packaging compares the two percentages (50 Percent remaining Scheduled Used versus 75 Percent remaining Lifetime Eligibility) and uses the lower of the two percentages (50 percent) times the Max Scheduled Award (adjusted for FA Load) to determine the Pell Grant award.

Example 2

1. Student's remaining Percent Scheduled Used is 50 percent (Pell1 maximum of 100 percent minus 50 Percent Scheduled Used equals a delta of 50 percent).

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2. Student's remaining Lifetime Eligibility is 25 percent (Lifetime Eligibility Percent Maximum of 600 percent minus 575 percent Lifetime Eligibility Used equals a delta of 25 percent).
3. Packaging compares the two percentages (50 Percent remaining Scheduled Used versus 25 Percent remaining Lifetime Eligibility) and uses the lower of the two percentages (25 percent) times the Max Scheduled Award to determine the Pell Grant award.

Pell Grant Disbursement Rounding Examples

Financial aid award disbursement amounts, including Pell Grants, are determined in part by the Rounding Option selected in Financial Aid Item Type setup. For complete information on Financial Aid Item Type setup:

See Defining Financial Aid Item Types.

If the Financial Aid Item Type Rounding Option attribute *equals* None, then no rounding takes place, and Pell Grant award disbursement amounts are in U.S. dollars and cents. If the Rounding Option attribute *does not equal* None, then the following Pell Rounding Rules are applied regardless of the settings of Rounding Option, Round Direction, or Award Remainder Rule.

- If the number of terms is *even,* the system alternately rounds term amounts up or down based on how the first term amount is rounded and disregards the decimal amount for all other terms. For example:

  If the first term decimal amount is equal to or greater than .50 USD, then the first term amount is rounded up, and all remaining terms follow a rounding treatment of down, up, down, etc. regardless of their decimal amounts.

  If the first term decimal amount is less than .50 USD, then the first term amount is rounded down, and all remaining terms follow a rounding treatment of up, down, up, etc. regardless of their decimal amounts.

  Example 1: Formula 1, two terms, Full-time student, Even Term Rounding

  Term 1 Full-time 2775.00 USD/2 = 1387.50 USD – Round up to 1388.00 USD

  Term 2 Full-time 2775.00 USD/2 = 1387.50 USD – Round down to USD 1387.00 USD

  Total Award = 2775.00 USD

  Example 2: Formula 1, four terms, Full-time student, Even Term Rounding

  Term 1 Full-time 2650.00 USD/4 = 662.50 USD – Round up to 663.00 USD

  Term 2 Full-time 2650.00 USD/4 = 662.50 USD – Round down to 662.00 USD

  Term 3 Full-time 2650.00 USD/4 = 662.50 USD – Round up to 663.00 USD

  Term 4 Full-time 2650.00 USD/4 = 662.50 USD – Round down to 662.00 USD

  Total Award = 2650.00 USD

  Example 3: Formula 3, four terms, Mixed-load student, Even Term Rounding

  Term 1 (8–weeks) Half-time (1038.00 USD x 8)/30 weeks = 276.80 USD – Round up to 277.00 USD

  Term 2 (8–weeks) Half-time (1038.00 USD x 8)/30 weeks = 276.80 USD – Round down to 276.00 USD

  Term 3 (8–weeks) Full-time (2075.00 USD x 8)/30 weeks = 553.33 USD – Round up to 554.00 USD

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Term 4 (8–weeks) Full-time (2075.00 USD x 8)/30 weeks = 553.33 USD – Round down to 553.00 USD

Total Award = 1660.00 USD

> **Note**
>
> For Example 3, note that for Term 2, the disbursement is rounded down even though cents are greater than or equal to .50 USD. Also, note for Term 3, the disbursement is rounded up even though the cents are less than .50 USD

- If the number of terms is *three,* the system rounds to one direction, up or down, for the first two terms, and to the other direction for the third term. Whether the system initially rounds up or down for the first two terms depends on the decimal amount of the first term only; it disregards the decimal amount for the third term and rounds up or down based on the first two terms.

  If the first term decimal amount is equal to or greater than .50 USD, then the first term amount is rounded up, the second term amount is rounded up, and the third term amount is rounded down.

  If the first term decimal amount is less than .50 USD, then the first term amount is rounded down, the second term amount is rounded down, and the third term amount is rounded up.

  Example 4: Formula 1, three terms, Full-time student, Three-term Rounding

  Term 1 Full-time 4700.00 USD/3 = 1566.66 USD – Round up to 1567.00 USD

  Term 2 Full-time 4700.00 USD/3 = 1566.66 USD – Round up to 1567.00 USD

  Term 3 Full-time 4700.00 USD/3 = 1566.66 USD – Round down to 1566.00 USD

  Total Award = 4700.00 USD

  Example 5: Formula 1, three terms, Full-time student, Three-term Rounding

  Term 1 Full-time 2200.00 USD/3 = 733.33 USD – Round down to 733.00 USD

  Term 2 Full-time 2200.00 USD/3 = 733.33 USD – Round down to 733.00 USD

  Term 3 Full-time 2200.00 USD/3 = 733.33 USD – Round up to 734.00 USD

  Total Award = 2200.00 USD

- When determining the rounding methodology, the system only includes terms where the scheduled disbursement's decimal amount is greater than zero to determine whether there is an even number of terms or not. In other words, terms with a scheduled disbursement amount ending in whole dollars are not considered part of the term count when assessing terms eligible for rounding.

  Example 6: Formula 1, two terms, Mixed-load student, One-term Rounding (only one term has a decimal amount greater than .00).

  Term 1 Full-time 2075.00 USD/2 = 1037.50 USD – Round up to 1038.00 USD

  Term 2 Half-time 1038.00 USD/2 = 519.00 USD – No rounding needed, 519.00 USD

  Total Award = 1557.00 USD

  Example 7: Formula 1, four terms, Mixed-load student, Three-term Rounding (three terms have decimal amounts greater than .00).

  Term 1 Less-than-half-time 1325.00 USD/3 = 441.67 USD – Round up to 442.00 USD

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Term 2 Three-quarter-time 3975.00 USD/3 = 1325.00 USD – No rounding needed, 1325.00 USD

Term 3 Full-time 5300.00 USD/3 = 1766.66 USD – Round up to 1767.00 USD

Term 4 Full-time 5300.00 USD/3 = 1766.66 USD – Round down to 1766.00 USD

Total Award = 5300.00 USD

- Disbursement protection is not used with Pell Grant awards. The system disregards the disbursement protection attribute of the Financial Aid Item Type setup for Pell Grant item types and always recalculates the Pell Grant award and scheduled disbursements without regard to what has been originated or disbursed.

  If the originated or disbursed amount exceeds the revised calculation by 1.00 USD (for example, the disbursed amount = 1367.00 USD and the revised calculation amount = 1366.00 USD), the disbursement process takes 1.00 USD back, and you should consider a change origination with Common Origination and Disbursement for the recalculated, lesser amount.

  If the originated or disbursed amount is less than the revised calculation by 1.00 USD (for example, the disbursed amount = 1127.00 USD and the revised calculation amount = 1128.00 USD), the disbursement process disburses an additional 1.00 USD for the term. You should consider a change origination with Common Origination and Disbursement for the recalculated, greater amount.

  If the originated or disbursed amount contained cents and the revised calculation no longer contains cents (for example, the disbursed amount = 333.33 USD and the revised calculation amount = 333.00 USD), in order for the total Pell Grant award (sum of all scheduled disbursements) to result in whole dollars, you should either: (a) turn rounding off at the Pell Grant item type level so subsequent disbursements contain cents, (b) perform a custom split to reflect cents in subsequent disbursement terms, or (c) handle cents through professional judgment. If you choose option (a) and you have already disbursed your Pell amounts with cents, you should consider continuing to award in dollars and cents (Pell Item Type Rounding Option = None) for the duration of the award year.

Pell Grant Point–in–Time Examples

This section provides examples of how a Pell Grant can be calculated differently based on the PEC setup and different points in time in relation to the term start date:

- Before term start date
- Mid-term prior to term census date
- On or after term census date

A student attends a semester-based institution, and is an undergraduate in the liberal arts academic program. Neither the student's program nor career have defaults that differ from the installation defaults. The student's annual Pell COA is 5450.00 USD and the primary EFC is 00154; resulting in a Max Scheduled Award of 5,200.00 USD. The Pell Number of Terms is 2. According to the Federal Pell Grant Schedule, the student receives an annual award of 5200.00 USD if enrolled full-time, an annual award of 3900.00 USD if enrolled three-quarter time, and an annual award of 2600.00 USD if enrolled half-time.

The student is first awarded a Pell Grant on March 1, 2009. To calculate the student's Pell Grant amount, the Packaging routine first determines whether PEC setup values exist at the student override level and then the academic program level for the student. After the routine determines that no aid processing rule set is attached to the liberal arts academic program, it checks for career level defaults. Because no aid processing rule set is assigned to the undergraduate career, it uses the installation defaults. The Pell calculation fields on the Financial Aid Defaults page have the following values:

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Field	Value
Pell Calculation Start	Formula 1 — Full-time
Pell Calculation Midterm	Formula 1 — Full-time
Pell Calculation Census	Formula 1 — FA Load

Packaging compares the current date (March 1, 2009) against the term start date and census date to determine which enrollment value to use when calculating the student's Pell Grant:

Term	Term Start Date	FA Census Date
Fall	09/17/09	10/20/09
Spring	01/23/10	03/10/10

Because the system date is before the term start date for both semesters, Packaging uses the Pell Calculation Start value for enrollment, *Formula 1 Full-time.* The student's Pell Grant award is 5200.00 USD for the aid year, with a term amount of 2600.00 USD for each term.

The following table shows how the student's Pell Grant award changes as you recalculate the student's Pell Grant eligibility at different points in the aid year. The student's current FA Load value after the census date is three-quarter time in fall and is half-time in spring.

Current Date	Pell Calculation Field Used - Fall	Load	Fall Pell Award Amt	Pell Calculation Field Used - Spring	Load	Spring Pell Award Amt	Total Pell Award
03/01/09	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	5200.00 USD
09/20/09	Pell Calculation Mid-term Formula 1 — Full-time	Full Time	2600.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	5200.00 USD
10/25/09	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	4550.00 USD
01/30/10	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	4550.00 USD

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Current Date	Pell Calculation Field Used - Fall	Load	Fall Pell Award Amt	Pell Calculation Field Used - Spring	Load	Spring Pell Award Amt	Total Pell Award
03/25/10	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Census Formula 1 — FA Load	Half Time	1300.00 USD	3250.00 USD

See Defining Pell Eligibility Calculation (PEC) Setup.

Pell Grants for Non-standard Terms and Two Pell Grants in an Aid Year Examples

To support Leading or Trailing Summer terms, the system can package a Pell Grant across both Academic and Non-Standard award periods. You should consider carefully the Disbursement Plan/Split Code being used to award Pell1 and Pell2. The system uses Disbursement Plans to determine for which terms to consider the student's Pell eligibility, but it does not use the Split Code nor Split Code Formulas as part of its distribution spread determination. Instead, the system uses either (a) Pell Number of Terms or (b) Academic plus Non-Standard Base Weeks to determine each term's award amount and how the award is spread across the enrolled terms.

> **Note**
>
> Although not used for Pell Grant awarding, the system still requires that you specify default Split Code and Split Code Formula values so that the fields are populated. These values are not used to distribute the Pell award into scheduled disbursements.

If your institution intends to award Pell Grants in either the Leading or Trailing Summer, you need to create Disbursement Plans that encompass all terms in which the student may receive a Pell Grant.

If the Academic Program supports a Leading Summer term, create a new Disbursement Plan like this:

- Semester-based: Leading Summer, Fall, Spring
- Quarter-based: Leading Summer, Fall, Winter, Spring

Example:

- Leading Summer Term: 2960.00 USD
- Fall Term: 2960.00 USD
- Spring Term: 0.00 USD

If the Academic Program supports a Trailing Summer term, create a new Disbursement Plan like this:

- Semester-based: Fall, Spring, Trailing Summer
- Quarter-based: Fall, Winter, Spring, Trailing Summer

Example:

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- Fall Term: 2675.00 USD
- Spring Term: 2675.00 USD
- Trailing Summer Term: 0.00 USD

If the Academic Program supports both Leading and Trailing Summer terms, create a new Disbursement Plan like this:

- Semester-based: Leading Summer, Fall, Spring, Trailing Summer
- Quarter-based: Leading Summer, Fall, Winter, Spring, Trailing Summer

Similar to awarding Leading or Trailing Summer terms, if you intend to award a Pell2 award in the succeeding term following a Pell1 award, you should use the same Disbursement Plan/Split Code pattern for both awards. Inherent logic in the system ensures that, based on the Disbursement Plan/Split Code being used, Packaging inserts a Pell2 award in the next available term following a Pell1 award.

Example — Leading Summer:

- Leading Summer Term: 2960.00 USD (Pell1)
- Fall Term: 2960.00 USD (Pell1)
- Spring Term: 2960.00 USD (Pell2)

Example — Trailing Summer:

- Fall Term: 2960.00 USD (Pell1)
- Spring Term: 2960.00 USD (Pell1)
- Trailing Summer Term: 2960.00 USD (Pell2)

The system awards Pell1 and Pell2 in consecutive terms up to the maximum Pell eligibility based on the student's enrollment for that term. For purposes of this example, the student:

- has an Incoming Aggregates Percentage of 50 percent, which leaves a remaining Pell1 eligibility of 2,960.
- is Half-Time for the Fall Term – scheduled max award of 2,960 /2 = 1,480.
- is Full-Time for the Spring Term – scheduled max of 5,920 / 2 = 2,960
- is Full-Time for the Trailing Summer Term – scheduled max of 5,920 / 2 = 2,960

Example — Pell1 and Pell2 in consecutive terms:

- Leading Summer Term: 0.00 USD (No Enrollment)
- Fall Term: 1480.00 USD of Pell1 (based on the student's scheduled max award for that term's enrollment.)
- Spring Term: 2960.00 USD of Pell2 awarded based on student's enrollment for term under Year Round Pell. Enrollment for this term pushes student over 100% and is awarded as Pell2.
- Trailing Summer Term: 1480.00 USD of Pell2 (student is enrolled Full-time however is awarded remainder of Pell eligibility up to 150% of SFPG under Year Round Pell).
- Student receives both a 1480.00 USD Pell1 and a 4440.00 USD Pell2 for the award year.

Pell Grant Packaging Error Messages

The following table lists and explains possible Pell Grant Packaging error messages:

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Message Number	Message Text
9022	PELL -Invalid Title IV eligibility indicator
9023	PELL - Not Title IV eligible
9026	PELL -Invalid NSLDS level
9027	PELL -Student is not an undergraduate, not PELL eligible
9033	PELL -Student has Bachelors degree, not PELL eligible
9136	Student Base Weeks or term count found to be 0 during PELL calculation
9148	PELL award cannot be assigned; there is no matching disbursement for term
9149	Not PELL eligible based on combination PELL Index and PELL COA
9150	Invalid FA Load Code; Must have a value of 'F', 'T', 'H', 'L' or 'N'
9151	Item Type, Term, Aggregate, and/or Plan limits are less than PELL award
9152	PELL Index (Federal EFC) exceeds PELL Index maximum
9161	Student Enrollment Weeks (or terms) total exceeds Base Weeks (or term count).
9185	Calculated PELL award exceeds aggregate eligibility; award rejected.
9214	Not Pell Eligible: The Student is a Graduate Student
9234	For 2010, Pell Calculation Start, Midterm and Census date entries are invalid
9236	Not eligible for 2nd Pell award since 1st Pell award was not awarded at 100%
9237	Not eligible for 2nd Pell award; disbursement terms overlap with 1st Pell award
9238	Ineligible for Pell award; Lifetime Eligibility Percentage has been reached.
9239	Pell award has been reduced by student's remaining Lifetime Eligibility.
9405	PELL award reduced by Aggregate limits
9244	Regular Pell Disbursement Schedules have not been loaded into the system for this Aid Year. Therefore, an estimated award is assigned using the previous Aid Year’s Regular Pell Disbursement Schedule.
9249	Alternate Pell Disbursement Schedules have not been loaded into the system for this Aid Year. Therefore, an estimated award is assigned using the previous Aid Year’s Alternate Pell Disbursement Schedule.
9251	No Pell Awarded in Crossover Term.

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Message Number	Message Text
9253	Not eligible for an Additional Pell due to an ineligible FA Load.
9254	Not eligible for Pell grant due to cumulative load exceeding 100%.

Packaging Pell Grants Using Pell Table Enablement Tables

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

If the annual schedules have not been published for the future year (for example, Aid Year 2017), and you attempt to package a student's Pell Grant for that year, the system uses the current year's (Aid Year 2016) schedules to make the 2017 award. If the student is eligible, the system returns a non-zero Pell award with an estimated award message (9244 or 9249) depending on whether the Pell award was made using the Regular or Alternate Schedules.

Use the delivered queries QA_CS_FA_PELL_SCHEDULE_REGULAR and QA_CS_FA_PELL_SCHED_ALTERNATE to render contents of the Pell Award (PTE) tables. Query results are not in spreadsheet formats.

> **Note**
>
> To calculate Pell grants for Aid Years 2016 and 2017 (Award Years 2015-2016 and 2016-2017), Oracle supports both the current Pell Program FAPPKPEL delivered as a Critical Update, and the new Pell Table Enablement feature (FAPPKPTE).
>
> Beginning with Aid Year 2018 (2017-2018), Oracle plans to discontinue the old Pell Program (FAPPKPEL) and support only the Pell Table Enablement program to calculate Pell grants.

Related Topics

- Defining Installation Level Defaults

Repackaging Pell Grants

If your system

- has existing awards with a Disbursement Plan/Split Code that includes only Academic terms; and
- you want to tie these existing awards to a Disbursement Plan/Split Code that spans both the Academic and Non-Standard terms,

you cannot use a repackaging plan that incorporates the Repackaging Rule Validate Item Type for Pell item types. This is because Validate Item Type always uses the Disbursement Plan/Split Code tied to the existing award. You can use the Repackaging Rule Use Original Plan to repackage Pell Item Types that require a Disbursement Plan/Split Code change. If your institution does not intend to award Pell Grants in Leading or Trailing Summer terms, you can use the Repackaging Rule Validate Item Type for Pell item types.

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Awarding Pell Grants Manually

If you manually award a Pell Grant that *exceeds* the Max Scheduled Award, the system reduces the award down to the Max Scheduled Award amount. Conversely, if you manually award a Pell Grant *for less than* the Max Scheduled Award, the system allows the award.

> **Note**
>
> When entering a Pell Grant manually on the Student Aid Package page, you can leave the award amount at zero. When you click the Validation button, the system automatically calculates the Pell Grant award according to the Pell eligibility calculation defined in your setup.

Awarding Pell Grants using Professional Judgment

Any amount of Pell Grant you award using Professional Judgment is accepted. Pell1 or Pell2 can exceed the Max Scheduled Award, the Total Percent Used value, and other Pell Grant awarding validations.

Reinstating a Canceled Pell Grant Award

Before reinstating a previously canceled Pell Grant, you must change the custom split code from *XX* to a valid disbursement split code for the student. You can then click the **Validation** button to recalculate the Pell Grant amount. After you recalculate the Pell Grant amount, you must remember to post it before leaving the award entry page.

Awarding Pell Grants for Post-Baccalaureate Teaching Certificate Candidates

A student who has earned a bachelor's degree and is pursuing an initial teaching certification or licensing credential that does not lead to a graduate degree is eligible for a Pell Grant for that aid year. The Packaging process determines the eligibility for this type of student by evaluating the following fields:

Record	Field	Description
ISIR_STUDENT	DEGREE_CERTIF	The degree or certification the student is pursuing. The student must be pursuing a teaching credential.
ISIR_STUDENT	FIRST_BACH_DEGREE	Indicates whether the student has a bachelor's degree. The student can have earned a bachelor's degree.
STUDENT_FA_TERM	NSLDS_LOAN_YEAR	The NSLDS loan year for the student. Eligible students cannot be graduate students.

If a student is pursuing a teaching credential and has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging evaluates the student for a Pell Grant.

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If a student is *not* pursuing a teaching credential but has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging does *not* evaluate the student for a Pell Grant.

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30

Managing Self-Service Awards

Managing Batch Processing

This section provides an overview of managing batch processing and lists the pages used to manage batch processing.

Understanding Managing Batch Processing

If you select **Batch** as the processing option on the Awarding Options setup page, you must run batch processing to update the *Pending Update* status of the student's package. When you run the batch process and no errors are detected, the system posts the data from the staging tables to the final award tables in the database. When the student returns to the Award Package page, the outcome of the batch process results in one of the following statuses: *Successful, Successful with Adjustments, Revised Package, Rejected* or *Needs Review.* The student may need to meet with a financial aid counselor if the status is either *Rejected* or *Needs Review.* Consequently, the administrator must determine why the status is either *Needs Review* or *Rejected,* fix the condition, reaward the student as necessary, and rerun the batch process. If the status is *Revised Package,* the student may need to resubmit the changes.

If you set the **Background Errors Allowed** field to *1* or some other integer on the Financial Aid Defaults page **(Set Up SACR**, and then **Install**, and then **Financial Aid Installation)** the system ends the batch process when it encounters a single student or multiple students who receive either a *Needs Review* or *Rejected* status based on the tolerance.

Page Used to Manage Batch Processing

Page Name	Definition Name	Navigation	Usage
Self Service Batch Process	RUNCTL_FA_SS_AWARD	**Financial Aid**, and then **Awards**, and then **Self Service Awarding**, and then **Post Self Service Awards**, and then **Self Service Batch Process**	Run the FAPPKSSB process to update self-service award tables.

Using Administrative Self-Service Inquiry Pages

This section discusses how to:

- Use self-service activity.
- View self-service awarding activity details.
- Remove a student in needs review or rejected status.
- View self-service batch summary.
- View self-service requests.

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Pages Used to View Administrative Self-Service Activity

Page Name	Definition Name	Navigation	Usage
Self-Service Activity	FA_SS_AWD_ACT_INQ	**Financial Aid**, and then **Awards**, and then **Self Service Awarding**, and then **View Self Service Activity**, and then **Self Service Activity**	Identify sequential outcomes of submit activity that occurs in the student's self-service record.
Self Service Awarding Activity Detail	FA_SS_AWD_INQ_SEC	Click the link below the **Date/Time** field on the Self-Service Activity page.	View self-service awarding activity details. Use this page to view submitted awards and the award status for each career's awards for historical or audit purposes.
Self Service Batch Summary	FA_SS_BATCH_INQ	**Financial Aid**, and then **Awards**, and then **Self Service Awarding**, and then **View Batch Summary**, and then **Self Service Batch Summary**	View the total number of students processed in a batch and a breakdown of the number of students processed by self-service status.
Self Service Awarding Batch Detail	FA_SS_BATCH_DTL1	Click the numeric link with the corresponding status on the Self Service Batch Summary page.	View self-service awarding batch detail.
Self Service Awarding Batch Activity Detail	FA_SS_AWD_INQ_SEC2	Click the **student ID** link on the Self Service Awarding Batch Detail page.	View a specific student's self-service awarding activity detail as part of a batch run.
Self Service Awarding Batch Error	FA_SS_BATCH_ERROR	Click the **Error Code** link on the Self Service Awarding Batch Detail page.	View the error code with the corresponding message.
Request Counselor Action	FA_SS_AWD_REQ_INQ	**Financial Aid**, and then **Awards**, and then **Self Service Awarding**, and then **View Self Service Requests**, and then **Request Counselor Action**	Used by financial aid personnel to process the administrative requests submitted by the students.

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Page Name	Definition Name	Navigation	Usage
Self Service Activity by Status	FA_SS_AWD_ACT_INQ	**Financial Aid**, and then **Awards**, and then **Self Service Awarding**, and then **View Self Service Status**, and then **Self Service Activity by Status**	Identify students by self-service status for which additional action might be warranted. You can access self-service activity by status by specifying a particular status in the search dialogue page. Select the student whom you want to review. Click the link below the **Date/Time** field to view the Self Service Awarding Activity Detail page.

Use Self-Service Activity

Access the Self-Service Activity page (**Financial Aid**, and then **Awards**, and then **Self Service Awarding**, and then **View Self Service Activity**, and then **Self Service Activity**).

Field or Control	Description
Sequence	Indicates the chronological order of the student's self-service activity. You can update the student's self-service status using the **Status** field that corresponds with the highest sequence. For example, if the status is *Needs Review* or *Rejected,* fix the underlying problem, repackage as necessary, and change the status.
Date/Time	Displays the date and time of the self-service action. Click a link to access the Self Service Awarding Activity Detail page.

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Field or Control	Description
Status	The processing option that you selected on the Awarding Options setup page affects the status. If you select **Batch,** the outcome is *Pending Update* until you run the batch process. After you run the batch process, the outcome can be *Successful, Successful w/Adjustments, Revised Package, Rejected,* or *Needs Review.* If you select **Real Time,** the outcome is *Successful, Successful with Adjustments, Rejected,* or *Needs Review.* The status values are: *Needs Review:* The system cannot process one of the student's awards. The system does not post the changes. If errors occur while the system is processing an award, the result is a *Needs Review* status. The system displays the awards as view only and the **Accept** and **Decline** check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor. *New Package:* No previous self-service activity occurred and the student is eligible to receive awards. The student can accept, decline, or reduce any or all of the awards that are currently available. *Pending Update:* The student submitted the award acknowledgement. The student can revisit this page to determine the acknowledgement, changes, or both are accepted. The student can still make changes in his or her existing package if the status is *Pending Update:* The student does not see the revised, reduced, or updated award amounts on the Financial Aid - Disbursement Schedule page until the batch process has been run. *Rejected:* The system cannot process the student's acknowledgment, adjustments, or both. The system does not post the changes. If errors occur during initialization and setup, the result is a *Rejected* status. All awards are rejected. The system displays the awards as view-only and the **Accept** and **Decline** check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor. *Revised Package:* After a student submits an award acknowledgment, this status indicates that the financial aid staff revised the student's financial aid package since the student last submitted a transaction. The student can accept, reduce, or decline any or all of the awards that are currently available. *Successful:* The system successfully processed the acknowledgement, changes or both submitted by the student. *Successful with Adjustment:* The system successfully processed the student's award

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Field or Control	Description
	acknowledgment, but made adjustments to one or more awards. If the student reduced one or more awards below the minimum amount allowed, the system adjusts the awards to the minimum amount and returns this status.

Viewing Self-Service Awarding Activity Details

Use the Self Service Awarding Activity Detail page to view a student's award amounts and award statuses that resulted from a self-service award acknowledgment submission.

If an error occurs during real-time processing, the error link is available next to the status for the award that did not pass validation or posting. When you click the link, the system displays the message text for the error code.

Removing a Student in Needs Review or Rejected Status

If a self-service transaction results in a *Needs Review* or *Rejected* status, you can update the status for the most current transaction. If you are processing in real time, click the date/time stamp to view the Activity Detail page. If the **Error** link is available, click it to determine why the system set the status to *Needs Review* or *Rejected.*

If the error was caused by setup data, adjust the setup data and set the status to *Pending Update* on the Self-Service Activity page. Instruct the student to submit the acknowledgement again.

If the error was caused by award edits or the error link is unavailable, repackage the student. This sets the self-service status to *Revised Package* the next time the student accesses the self-service page. Instruct the student to submit the acknowledgement again.

If you are processing in batch mode, access the Batch Summary page and click the numeric link to access students with a *Rejected* or *Needs Review* status. Click the **Error Code** link to determine the error. After you resolve the problem, access the Self-Service Activity page and set the status to *Pending Update.* Run the batch process again.

Viewing Self-Service Batch Summary

The Self-Service Batch Summary page displays the date and time that the batch process was run as well as the operator ID. It records the number of students processed and the number of students by self-service status. You can click the numeric link to identify the students with the corresponding status. If you set the **Background Errors Allowed** field to *1* on the Financial Aid Defaults page, the system ends the batch process when it encounters a single student who receives either a *Needs Review* or *Rejected* status.

The system also stores student IDs for each of the students processed. The sequence number for the corresponding self-service activity record (SS_FA_STDNT_HDR) is stored as a cross-reference. The system stores the item type, academic career, and error code that caused the package to fail (Rejected or Needs Review). When an error occurs, the system sets the package to *Rejected* or *Needs Review* without needing to process succeeding awards in the package. If the error is a data setup problem, then the system omits the item type and populates only the error code field. The administrator can review the package that resulted in either the *Rejected* or *Needs Review* status.

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Viewing Self-Service Requests

Access the Administrative Requests page. Use this page to process administrative requests submitted by the student.

Field or Control	Description
Seq Nbr (sequence number)	The chronological order of the student's self-service activity.
Request Type	The student requested *Change Request, Meeting Request,* or *Withdraw Application.*
User ID	The person who performed the action.
Status	Select *Canceled, Closed, Open, Pending,* or *Updated.*
Action Taken	Select *Cancel Aid, Meeting, No Action,* or *Repackage.*

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31

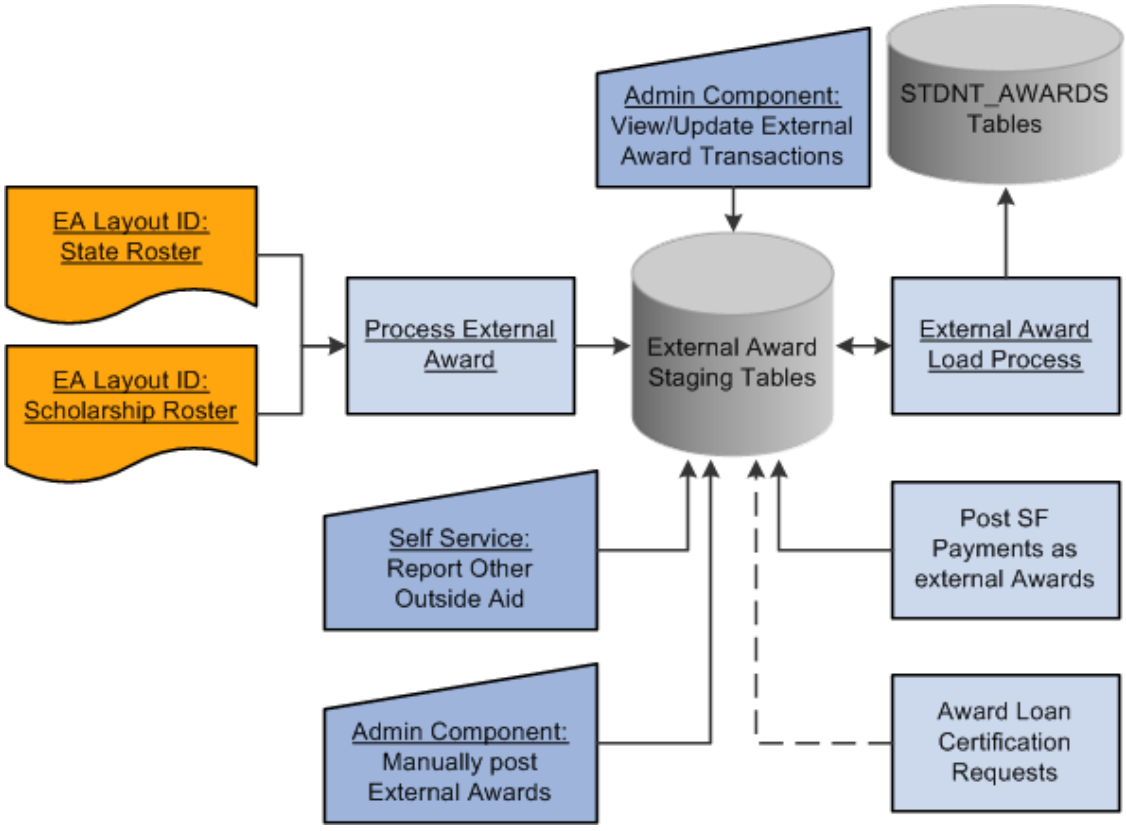
Managing External Award Reporting

Understanding External Award Processing

A core set of External Award Staging records maintain the external award transaction data. Each transaction is keyed with a set of values and has a processing status that indicates the loading of that transaction into the student award records.

The following diagram provides a high-level flow of the various data sources that update the core set of External Award Staging tables. After external award data or transactions have been updated to the staging tables, a separate External Award Load process is run to determine whether and how the external award data is to update the student award tables.

Flow of external award data



Manually Adding External Award Data

This section discusses how to:

- Add external awards by type.

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- Add award disbursement details.
- Add external awards by student.
- View Award Summary.

Pages Used to Add External Award Data

Page Name	Definition Name	Navigation	Usage
Add External Awards by Type	SFA_EA_STAGE_ADD	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Add External Awards by Type**, and then **Add External Awards by Type**	Add an external award type and source to one or multiple students.
Award Disbursement Detail	SFA_EA_DISB_DTL1	Click the **Award Detail** link on the Add External Awards by Type page.	Add award disbursement details.
Add External Awards	SFA_EA_STAGE_STDNT	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Add External Awards to Student**, and then **Add External Awards**	Add one or more external awards for a single student.
View Award Summary	SFA_EA_AWARD_SUMVW	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Add External Awards to Student**, and then **View Award Summary**	View a student's award record and need summary totals to make an overall assessment before manually adding a new external award transaction.

Adding External Awards by Type

Access the Add External Awards by Type page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Add External Awards by Type**, and then **Add External Awards by Type**).

This example illustrates the fields and controls on the Add External Awards by Type page. You can find definitions for the fields and controls later on this page.

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Use this page to quickly enter external awards with the same external award attributes, such as a list of students who are recipients of a graduate departmental award. You can identify the attributes or directly indicate item type and then list the student IDs and award amounts. You can also enter specific award details beyond the annual award amount.

Field or Control	Description
Award Type	(Optional) Select an award type defined on the External Award Type page. The financial aid item types associated with the combination external award type and source on the External Award Cross Reference setup page are displayed in the **Item Type** lookup.
Source	(Optional) Select an award source defined on the External Award Source page. The financial aid item types associated with the combination external award type and source on the External Award Cross Reference setup page are displayed in the **Item Type** lookup.

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Field or Control	Description
Load Action	Select the **Load Action** for the External Awards being entered. • *Offer* – Select *Offer* to allow the External Award process to post the transaction as an award with an **Award Status** of *Offer* and populate the Offered amount fields. If there is an existing award with matching **Item Type**, the award action must also be in *Offer* status to allow External Award processing to post successfully. **Note:** The corresponding **Disbursed Amount** fields are disabled when the **Load Action** is set to *Offer*. • *Offer/Accept* – Select *Offer/Accept* to allow the External Award process to post the transaction as an award with an **Award Status** of *Accept*. Both **Offered** and **Accepted** amount fields are populated. *Offer/Accept* is the default value.
Program	(Optional) Use if more than one program is defined for a source.
Item Type	(Optional) If you entered an award type and source, select an associated item type. If you did not enter an award type and source, your list of item types displays all active item types for this aid year. **Note:** You can specify either the item type or the award type and source (and program). To save the data on the page, select one.

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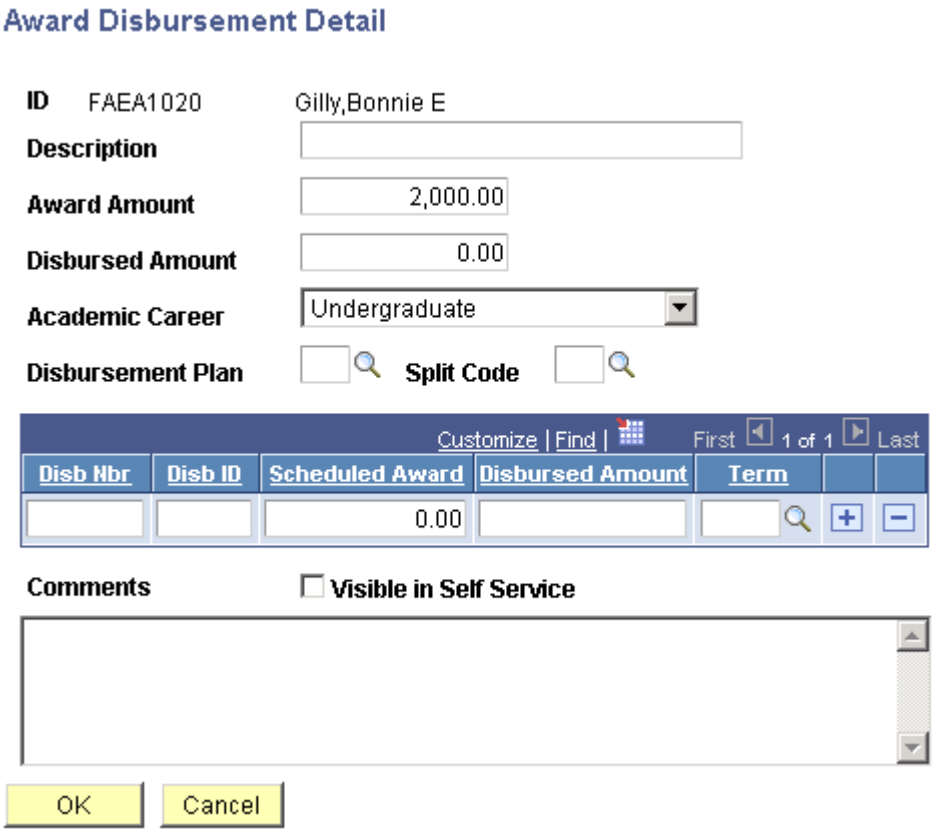
Field or Control	Description
Loan Certification	If this external award is a School Loan Certification Request, select this check box. When this check box is selected, the **Related Item Type** field appears: • If your Loan Certification Request is for a Stafford loan, select a related item type that evaluates both subsidized and unsubsidized Stafford item types. The External Award Load process evaluates federal need eligibility, as if awarding a subsidized and unsubsidized Stafford loan on the standard award entry pages. • If your Loan Certification Request is for a federal PLUS or alternative loan, identify the item type. **Note:** Identify an external award as a Loan Certification only after you have completed the necessary steps to process School Certification Request Applications for CommonLine. If the external award process determines the student's loan eligibility and successfully posts a loan award, then continue to process the loan certification according to the steps outlined in "Processing CommonLine Loans". See Setting Up External Award Processing. See Processing School Certification Request Applications.
Entry Code (Reporting code in the record layout)	(Required) Determines how transaction data is posted to the student's award package. Values are: • *Append:* Use to increase an existing award. Append transactions can increase annual award amounts to specific disbursement ID amounts. If the item type to be posted does not already exist, the External Award Load process treats the transaction as if **Entry Code** were *New.* • *New:* Use for external awards reported once each aid year. If the item type to be posted already exists, the External Award Load process sets the transaction to *Error.* • *Replace:* This is the default value when you are entering transactions manually. Use this value to change an existing annual and disbursement details of an award. If the item type to be posted does not already exist, the External Award Load process treats the transaction as if the **Entry Code** value is *New.*
Award Amount	(Optional) Enter the annual amount of the award in U.S. dollars and cents. The **Entry Code** value determines how the amount affects an existing award.
Award Detail	Click the **Award Detail** link to access the Award Disbursement Detail page.

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Adding Award Disbursement Details

Access the Award Disbursement Detail page (click the **Award Detail** link on the Add External Awards by Type page).

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



Use this page to enter additional details relevant to the external award transaction.

Field or Control	Description
Description	Enter a description of the external award to display on student self-service pages.
Award Amount	(Optional) Enter the annual amount to be posted. If scheduled disbursement amounts are provided, the cumulative scheduled disbursement amounts must equal the annual award amount. If this field is blank, and scheduled disbursement detail is provided, then the annual award amount is assigned the sum of scheduled disbursement amounts.

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Field or Control	Description
Disbursed Amount	(Optional) Enter the total disbursed amount to be posted. If disbursement detail amounts are provided, the cumulative amounts must equal the disbursed amount. If this field is blank and disbursement detail is provided, then **Disbursed Amount** is assigned the sum of the disbursement detail amounts. The **Disbursed Amount** field appears based on row order after the external award information is saved. **Note: Disbursed Amount** is updated only when the item type has a **Disburse Method** value of *No*. **Note: Disbursed Amount** field is disabled when **Load Action** is set to *Offer*.
Academic Career	The student's active career appears by default. If the student has multiple careers within an aid year, select the career to which the external award should be posted.
Disbursement Plan	(Optional) If provided, then the disbursement plan (DP) is used. If the DP is not provided, the default DP from the item type's career default DP/Split Code (SC) is used. If the default DP/SC does not work with the student's active term enrollment, the External Award Load process attempts to locate an appropriate DP/SC based on the student's active term enrollment. If a DP/SC is not found, the External Award Load process creates an error transaction. For Replace/Append transactions, this must be the same value used on the posted (noncanceled) award. **Note:** A split code does not need to be provided if a Disbursement Plan code is provided. Providing only a Disbursement Plan code allows the External Award Load process to establish the term disbursement structure and define the specific distribution based on amounts provided in the transaction.
Split Code	(Optional) If provided, this split code is used to determine the disbursement split formula. Split code is set to XX if disbursement data is provided on the External Award transaction.
Disb Nbr (disbursement number)	System assigned. After the external award information is saved, **Disb Nbr** appears based on row order. It is the award disbursement to be processed for this external award transaction.
Disb ID (disbursement ID)	(Optional) If known, the disbursement ID allows for specific award disbursement detailed amounts to be processed. It is typically used to append a disbursement amount to a specific disbursement ID on an existing award.
Scheduled Award	The scheduled or allocated disbursement amount.

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Field or Control	Description
Disbursed Amount	The disbursed or paid amount at the disbursement sequence level. **Note:** The disbursed amount on the posted award is updated only when the item type has a **Disburse Method** value of *No*. **Note: Disbursed Amount** field is disabled when **Load Action** is set to *Offer*.
Term	(Optional) If provided, the External Award Load process determines whether the term is valid with the student's enrollment. If a disbursement ID value is not provided, then the first disbursement ID for that term is updated.
Comments	Enter a comment of any length.
Visible in Self Service	Select to display this comment on the student's self-service page.
OK	Click this button to save the entered information and return to the Add External Awards by Type page.
Cancel	Click this button to delete any entered information and return to the Add External Awards by Type page.

If the External Award Load process is run for an append transaction that intends to update a disbursed amount and neither the **Disb ID** or **Term** field is specified on the Award Disbursement Detail page, an error message appears.

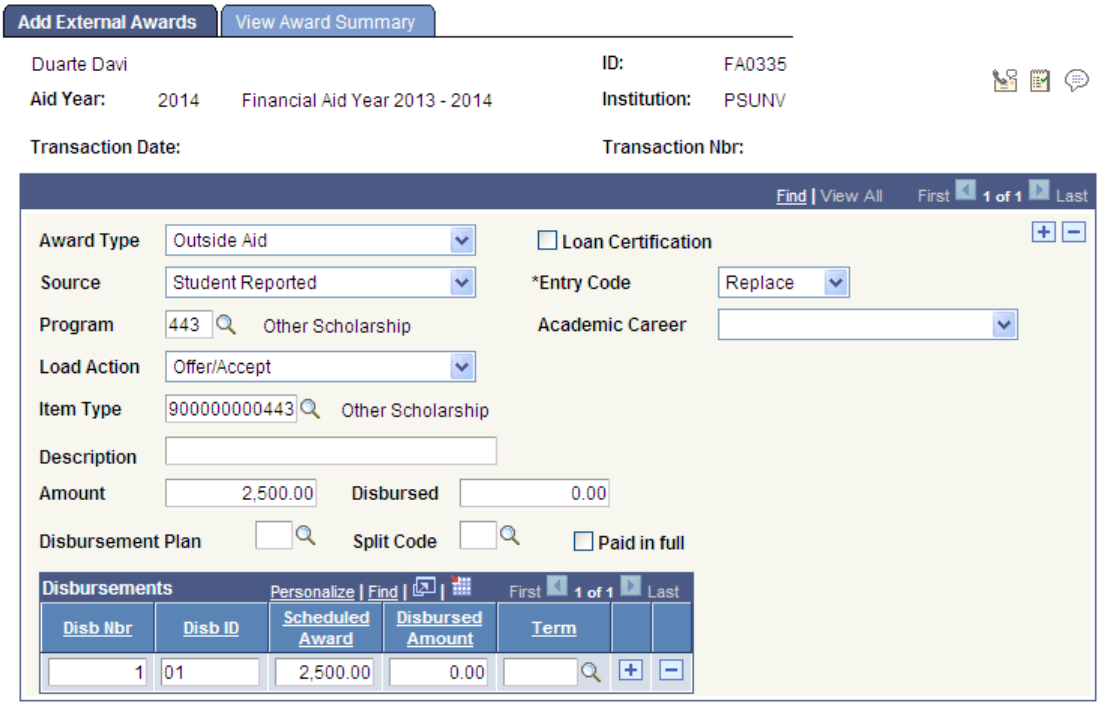
> **Note**
>
> The External Award process only allows item types that are non-disbursable to student accounts to be updated with disbursed amounts using the External Award process.

Adding External Awards by Student

Access the Add External Awards page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Add External Awards to Student**, and then **Add External Awards**).

This example illustrates the fields and controls on the Add External Awards page.

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Use this page to enter one or more external awards for a specific student.

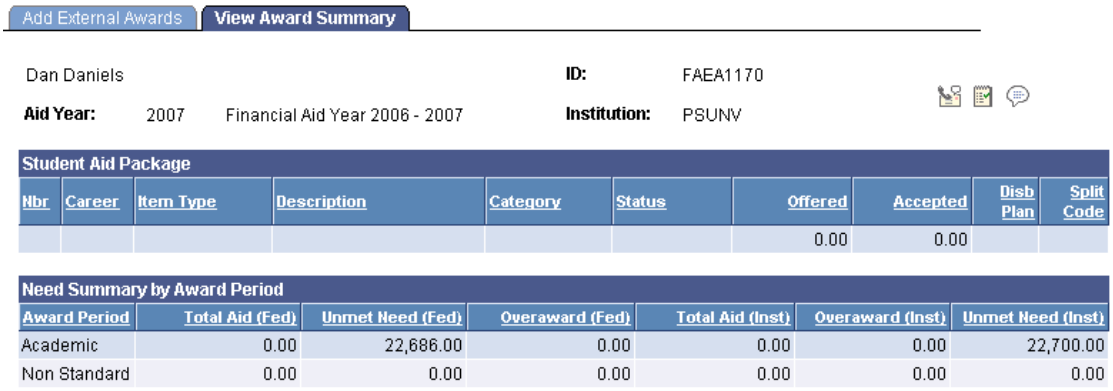
Related Topics

- Adding External Awards by Type
  Access the Add External Awards by Type page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Add External Awards by Type**, and then **Add External Awards by Type**).

Viewing Award Summary

Access the View Award Summary page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Add External Awards to Student**, and then **View Award Summary**).

This example illustrates the fields and controls on the View Award Summary page.



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This page provides current award and need summary information. Use this page to estimate or anticipate the possible effect of an external award on a student's award package.

Managing Existing External Award Transactions

You can view transactions, correct data, and run the External Award Load process for a specific student using Manage External Award components. The pages in the component contain similar information, but vary by the search record used.

This section discusses how to:

- Manage external award data.
- Manage external award data by type.
- Manage external award data by status.
- View and load a student's external award data.

Pages Used to Manage Existing External Award Transactions

Page Name	Definition Name	Navigation	Usage
Manage External Award Data	SFA_EA_STAGE_MGMT	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage External Award Data**, and then **Manage External Award Data**	View and update external award data in the External Award Staging table. Retrieve search results by transaction number, transaction date, source (external file, Self Service, manual entry, Student Financials, or loan certification file), or file mapping ID.
Award Disbursement Detail	SFA_EA_DISB_DTL	Click the **Detail** link on the Award tab of the Manage External Award Data page. Financial Aid, Awards, External Awards, Manage External Award Data	Enter additional details relevant to the external award transaction.
Manage External Award Data by Type	SFA_EA_STAGE_MGMT 1	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage External Awards by Type**, and then **Manage External Award Data by Type**	View and update external award data in the External Award Staging table. Retrieve search results by the type categories entered in the External Award Type page.

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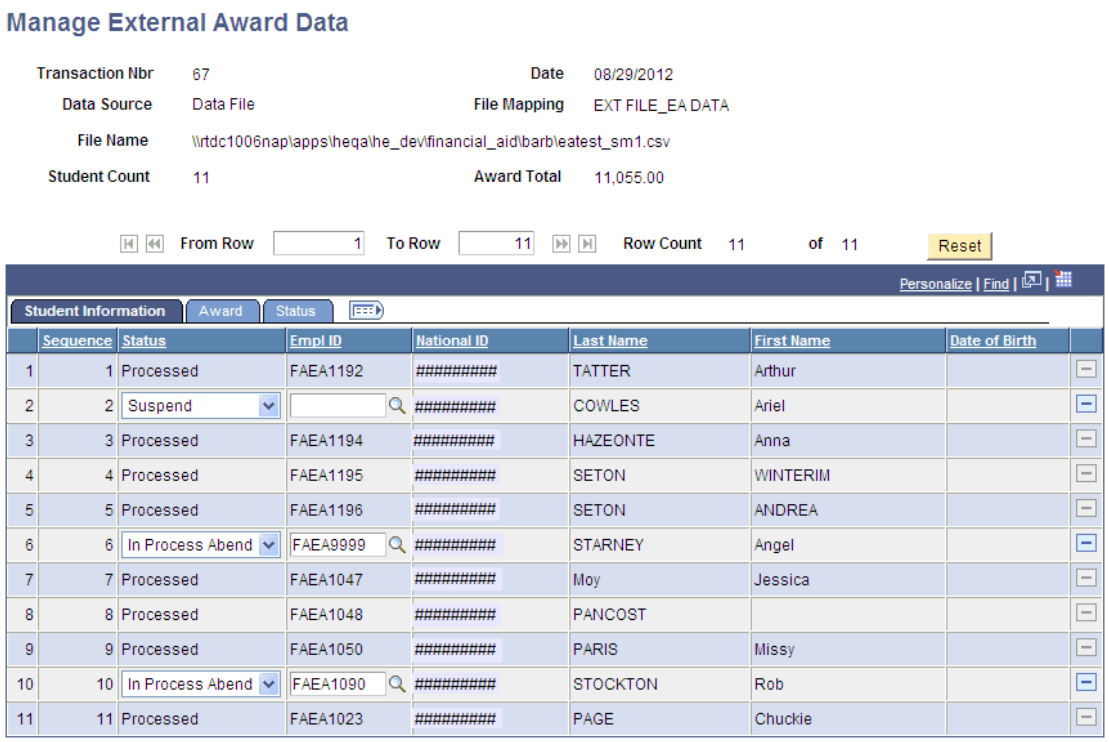
Page Name	Definition Name	Navigation	Usage
Manage External Awards Data by Status	SFA_EA_STAGE_MGMT3	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage Awards by Status**, and then **Manage External Awards Data by Status**	View and update external award data. Retrieve search results by processing status.
External Awards	SFA_EA_STAGE_MGMT2	Financial Aid, Awards, External Awards, Manage Student External Awards, External Awards	View and update external award data by student. When you use the page to make a remote call of the External Award Load process for a specific student, only external award transactions with an Unprocessed status are loaded.
Award Summary	SFA_EA_AWARD_SUMVW	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage Student External Awards**, and then **Award Summary**	View all existing awards and need summary for a student.
Award Disbursement Detail	SFA_EA_DISB_DTL2	Click the **Detail** link on the Award tab of the Manage External Award Data page (Manage Student External Awards component).	Enter additional details that are relevant to the external award transaction.
Enter comments for this award	SFA_EA_COMMENT_SEC	Click the **Comments** link on the Status tab of the Manage External Award Data page.	Add a comment and optionally choose to display it on the student's self-service page.

Managing External Award Data

Access the Manage External Award Data page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage External Award Data**, and then **Manage External Award Data**).

This example illustrates the fields and controls on the Manage External Award Data page, Student Information tab.

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Manage External Award Data

Transaction Nbr 67 Date 08/29/2012
Data Source Data File File Mapping EXT FILE_EA DATA
File Name \\rtdc1006nap\apps\heqa\he_dev\financial_aid\barb\eatest_sm1.csv
Student Count 11 Award Total 11,055.00

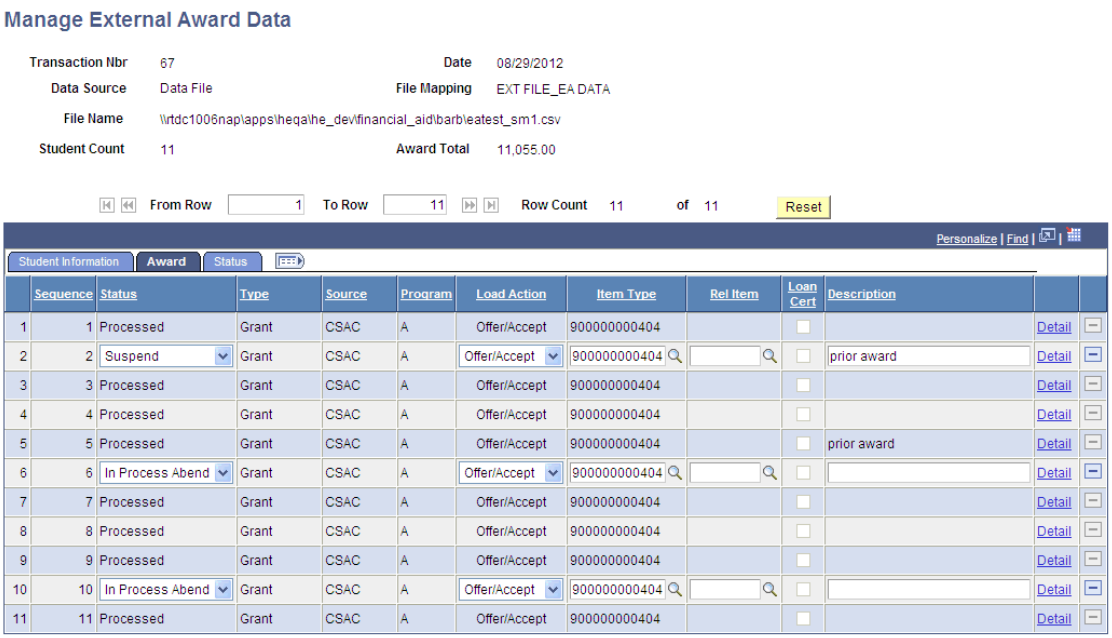
From Row 1 To Row 11 Row Count 11 of 11 Reset

Personalize | Find

Student Information | Award | Status

	Sequence	Status	Empl ID	National ID	Last Name	First Name	Date of Birth
1	1	Processed	FAEA1192	#########	TATTER	Arthur	
2	2	Suspend		#########	COWLES	Ariel	
3	3	Processed	FAEA1194	#########	HAZEONTE	Anna	
4	4	Processed	FAEA1195	#########	SETON	WINTERIM	
5	5	Processed	FAEA1196	#########	SETON	ANDREA	
6	6	In Process Abend	FAEA9999	#########	STARNEY	Angel	
7	7	Processed	FAEA1047	#########	Moy	Jessica	
8	8	Processed	FAEA1048	#########	PANCOST		
9	9	Processed	FAEA1050	#########	PARIS	Missy	
10	10	In Process Abend	FAEA1090	#########	STOCKTON	Rob	
11	11	Processed	FAEA1023	#########	PAGE	Chuckie	

This example illustrates the fields and controls on the Manage External Award Data page, Award tab.



Manage External Award Data

Transaction Nbr 67 Date 08/29/2012
Data Source Data File File Mapping EXT FILE_EA DATA
File Name \\rtdc1006nap\apps\heqa\he_dev\financial_aid\barb\eatest_sm1.csv
Student Count 11 Award Total 11,055.00

From Row 1 To Row 11 Row Count 11 of 11 Reset

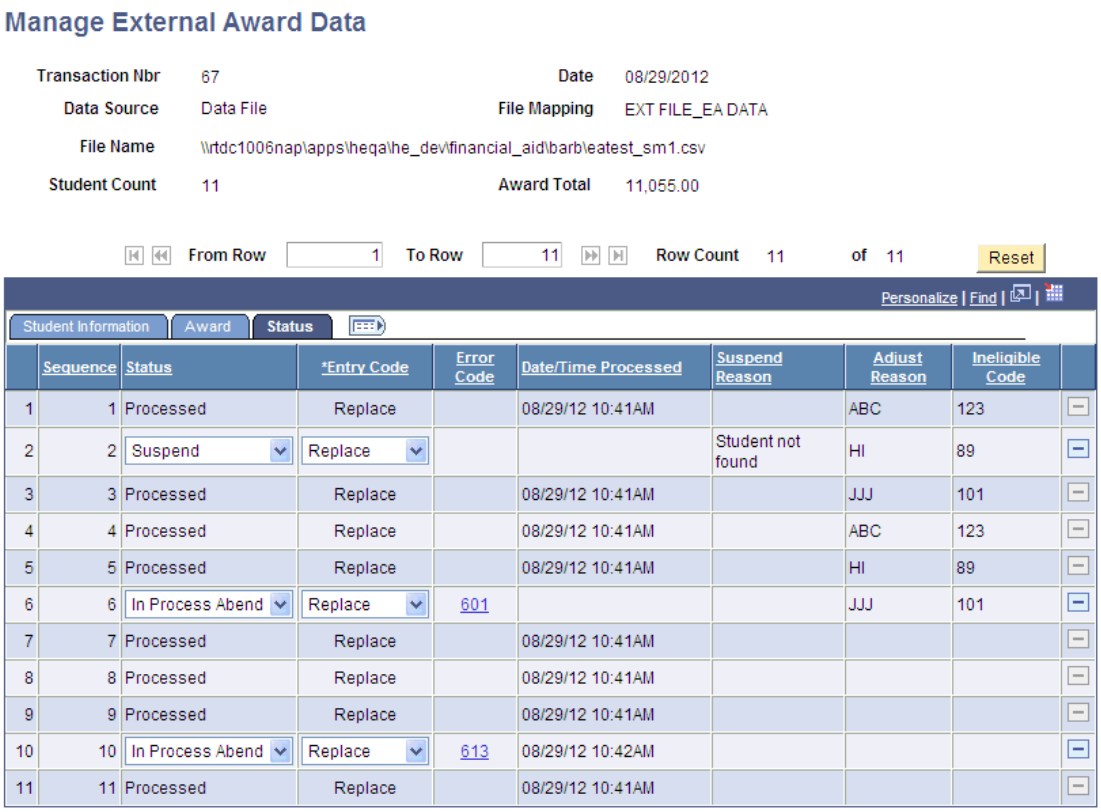
Personalize | Find

Student Information | Award | Status

	Sequence	Status	Type	Source	Program	Load Action	Item Type	Rel Item	Loan Cert	Description	
1	1	Processed	Grant	CSAC	A	Offer/Accept	900000000404				Detail
2	2	Suspend	Grant	CSAC	A	Offer/Accept	900000000404			prior award	Detail
3	3	Processed	Grant	CSAC	A	Offer/Accept	900000000404				Detail
4	4	Processed	Grant	CSAC	A	Offer/Accept	900000000404				Detail
5	5	Processed	Grant	CSAC	A	Offer/Accept	900000000404			prior award	Detail
6	6	In Process Abend	Grant	CSAC	A	Offer/Accept	900000000404				Detail
7	7	Processed	Grant	CSAC	A	Offer/Accept	900000000404				Detail
8	8	Processed	Grant	CSAC	A	Offer/Accept	900000000404				Detail
9	9	Processed	Grant	CSAC	A	Offer/Accept	900000000404				Detail
10	10	In Process Abend	Grant	CSAC	A	Offer/Accept	900000000404				Detail
11	11	Processed	Grant	CSAC	A	Offer/Accept	900000000404				Detail

This example illustrates the fields and controls on the Manage External Award Data page, Status tab. You can find definitions for the fields and controls later on this page.

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Manage External Award Data

Transaction Nbr	67	Date	08/29/2012
Data Source	Data File	File Mapping	EXT FILE_EA DATA
File Name	\\rtdc1006nap\apps\heqa\he_dev\financial_aid\barb\eatest_sm1.csv		
Student Count	11	Award Total	11,055.00

From Row 1 To Row 11 Row Count 11 of 11 Reset

Personalize | Find

Student Information | Award | Status

	Sequence	Status	*Entry Code	Error Code	Date/Time Processed	Suspend Reason	Adjust Reason	Ineligible Code
1	1	Processed	Replace		08/29/12 10:41AM		ABC	123
2	2	Suspend	Replace			Student not found	HI	89
3	3	Processed	Replace		08/29/12 10:41AM		JJJ	101
4	4	Processed	Replace		08/29/12 10:41AM		ABC	123
5	5	Processed	Replace		08/29/12 10:41AM		HI	89
6	6	In Process Abend	Replace	601			JJJ	101
7	7	Processed	Replace		08/29/12 10:41AM			
8	8	Processed	Replace		08/29/12 10:41AM			
9	9	Processed	Replace		08/29/12 10:41AM			
10	10	In Process Abend	Replace	613	08/29/12 10:42AM			
11	11	Processed	Replace		08/29/12 10:41AM			

This page displays all external award transactions (sequence numbers) associated with the transaction number. Each row of data is associated with an EMPLID and has segmented all relevant external award fields into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all columns of data.

You can update the external award transaction until it has a status of *Processed* or *Adjusted.*

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Student Information tab

Field or Control	Description
Status	Indicates the status that is specific to an external award transaction Values are: • *Adjusted:* System-assigned. Assigned during the batch External Award Load process if the transaction encountered a condition as noted in the Multi-Career batch run control option or the Term Mismatch batch run control option. Options allow transactions to be set to either *Adjusted* or *Error*. • *Duplicate:* Either set manually or set when multiple transactions with the same attributes are found during the External Award Load process. • *Error:* Transactions with an *Error* status have an accompanying Error code located on the Status tab. This status is assigned during the External Award Load process if an error occurred during the transaction. • *In Process Abend:* Assigned to transactions selected for a particular External Award Load process. If the program terminates during processing, batch transactions remain at this status. • *Processed:* Assigned by the system to indicate a successful External Award Load run. • *Reported:* Assigned to all new external awards with a **Data Source** value of *Self Service*. • *Skip:* Based on the Search/Match option. • *Suspend:* Based on the Search/Match option, Multi-Career batch option, or Term Mismatch batch option. • *Unprocessed:* Indicates that no attempt was made by the External Award Load process. All transactions start with this value except student-reported aid (Self Service).

Award tab

Field or Control	Description

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Field or Control	Description
Load Action	Select the **Load Action** for the External Awards being entered. • *Offer* – Select *Offer* to allow the External Award process to post the transaction as an award with an **Award Status** of *Offer* and populate the Offered amount fields. If there is an existing award with matching **Item Type**, the award action must also be in *Offer* status to allow External Award processing to post successfully. **Note:** The corresponding **Disbursed Amount** fields are disabled when the **Load Action** is set to *Offer*. • *Offer/Accept* – Select *Offer/Accept* to allow the External Award process to post the transaction as an award with an **Award Status** of *Accept*. Both **Offered** and **Accepted** amount fields are populated. *Offer/Accept* is the default value.
Item Type	(Required) If this field is blank, the External Award Load process uses the External Award Item Type Cross Reference setup to determine the item type to be added or updated, based on the award type and source provided. If neither is provided or the item type is not found in setup, the External Award Load process returns an Error code of *Error* with accompanying Error Message *Code 606 (item type not found).*
Rel Item (related item)	Available only when the **Loan Cert** check box is selected. Use to determine Stafford Subsidized and Unsubsidized eligibility. The related item type group should identify both a Subsidized and Unsubsidized Stafford item type for potential awarding.
Loan Cert (Loan Certification)	Indicates a Loan Certification Request with a corresponding related item type group or item type. Loan Certification always uses an **Entry Code** value of *New.* If the item type to be posted already exists on the student's award record, the External Award Load process returns a status of *Error* with accompanying Error Message code 612 (Invalid Report Code of *New.)* If the Packaging process determines that the student is not eligible for the loan, the External Award process returns an error code of *Processed* with accompanying Error Message Code 646 (Student is not eligible for this award).
Description	Appears on student self-service page to describe external award.
Detail	Click the **Detail** link to access the Award Disbursement Detail page.

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Status tab

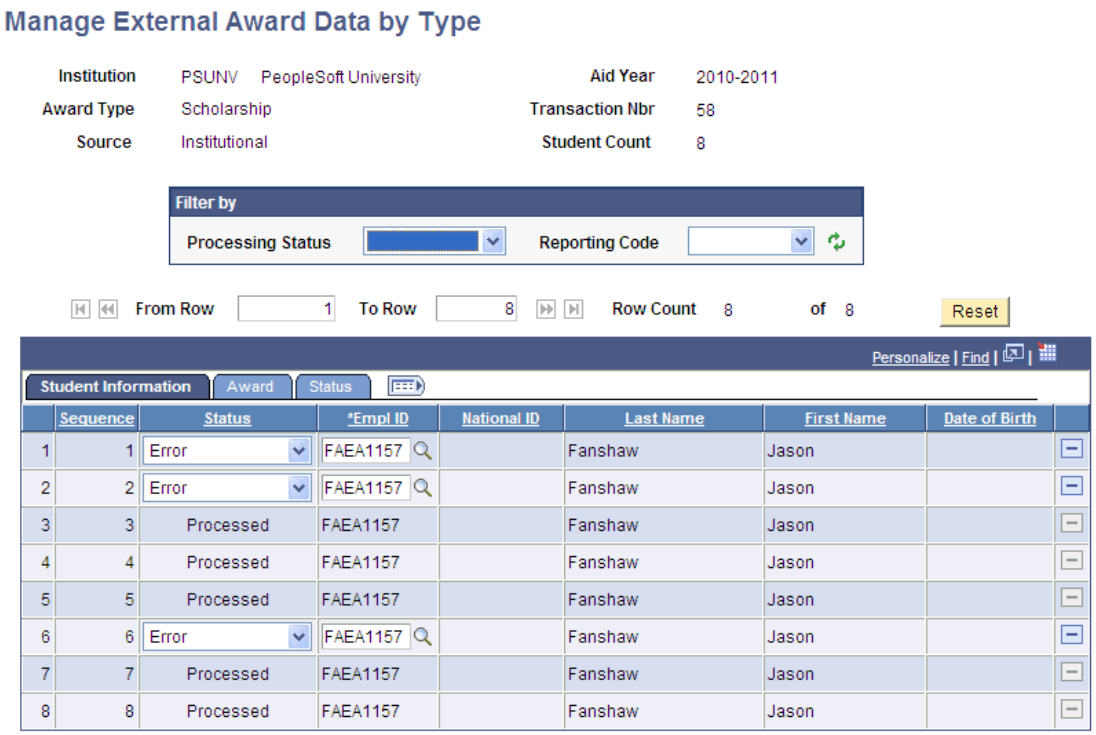
Field or Control	Description
Entry Code (Reporting Code in the record layout)	(Required) Used to determine how transaction data is posted to the student's award package. • *New:* If the item type to be posted already exists, the External Award Load process sets the transaction to *Error*. Use for external awards reported once each aid year. • *Replace:* Default value when you are entering transactions manually. Use this value to change an existing annual amount and disbursement details of an award. If the item type to be posted does not already exist, the External Award Load process treats this transaction as if the **Entry Code** value is *New*. • *Append:* Use to add to an existing award. Append transactions can increase the annual award amounts, specific disbursement IDs, or both. If the item type to be posted does not already exist, the External Award Load process treats the transaction as if the **Entry Code** value is *New*.

Managing External Award Data by Type

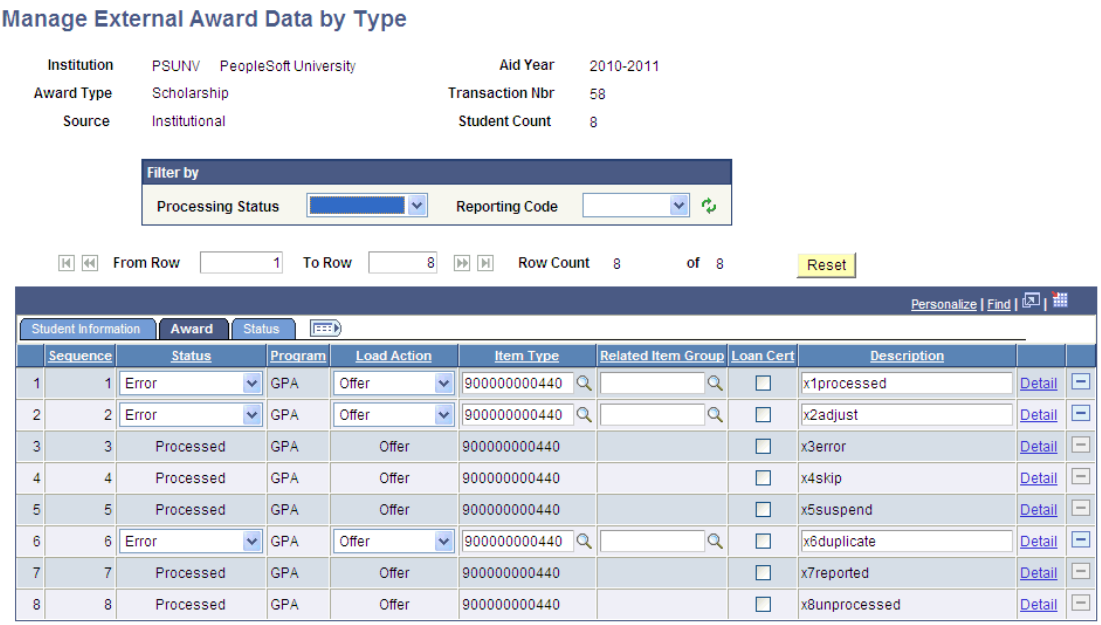
Access the Manage External Award Data by Type page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage External Awards by Type**, and then **Manage External Award Data by Type**).

This example illustrates the fields and controls on the Manage External Award Data by Type page, Student Information tab.

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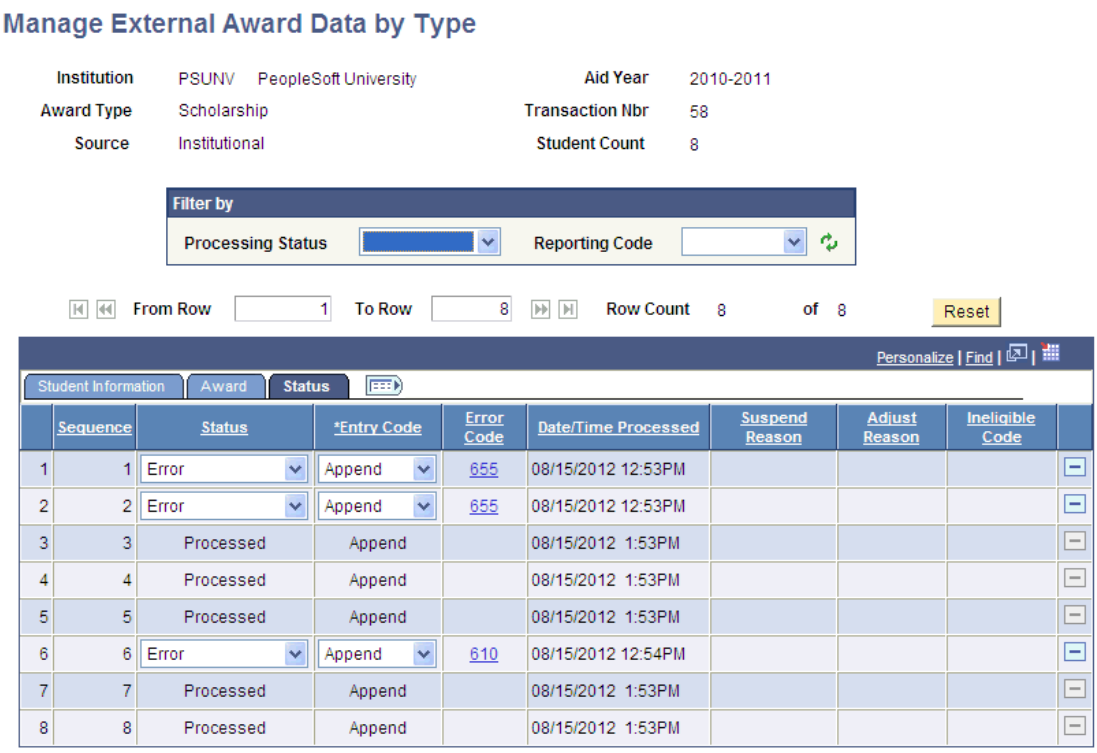


This example illustrates the fields and controls on the Manage External Award Data by Type page, Award tab.



This example illustrates the fields and controls on the Manage External Award Data by Type page, Status tab. You can find definitions for the fields and controls later on this page.

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This page displays all external award transactions (sequence numbers) associated with the transaction number. Each row of data is associated with an EMPLID and relevant external award fields are displayed in three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all columns of data.

You can update the external award transaction until it has a status of *Processed* or *Adjusted.*

You can filter results by processing status, entry code, or both.

Related Topics

- Managing External Award Data
  Access the Manage External Award Data page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage External Award Data**, and then **Manage External Award Data**).

Managing External Award Data by Status

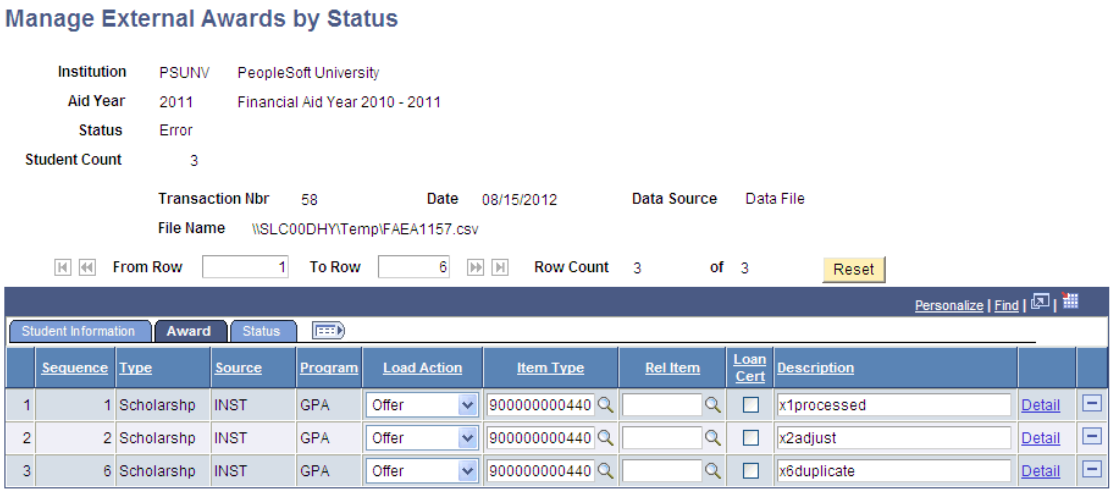
Access the Manage External Award Data by Status page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage Awards by Status**, and then **Manage External Award Data**).

This example illustrates the fields and controls on the Manage External Award Data by Status page, Student Information tab.

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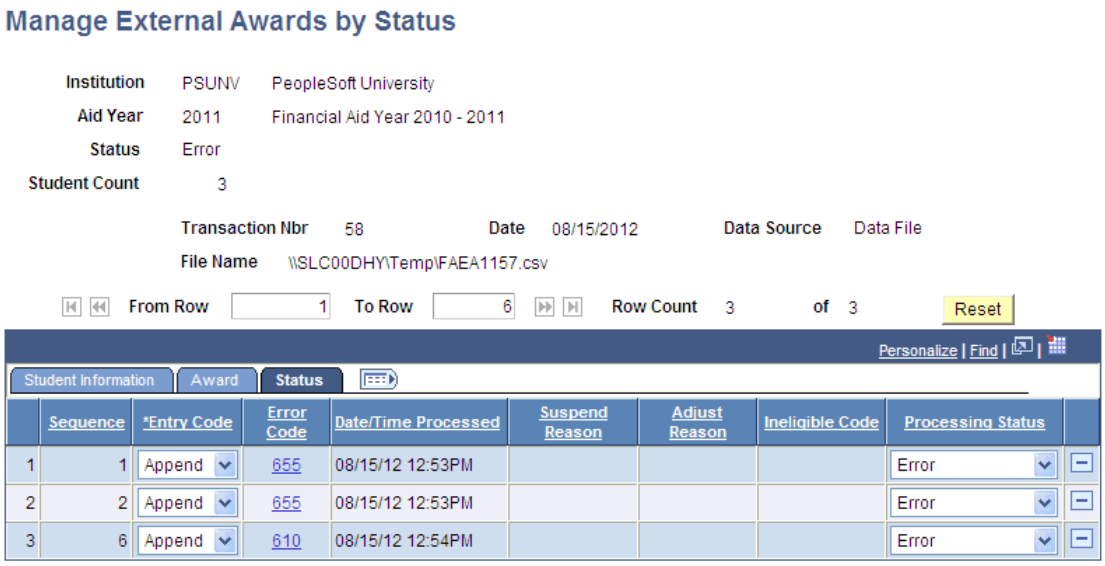


This example illustrates the fields and controls on the Manage External Award Data by Status page, Award tab.



This example illustrates the fields and controls on the Manage External Award Data by Status page, Status tab. You can find definitions for the fields and controls later on this page.

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The Manage External Award Data by Status page displays all external award transactions (sequence numbers) associated with the transaction number. Each row of data is associated with an EMPLID and all relevant external award fields are segmented into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all three sets of fields.

You can update the external award transaction until it has a status of *Processed* or *Adjusted.*

You can filter results by processing status, entry code, or both.

Related Topics

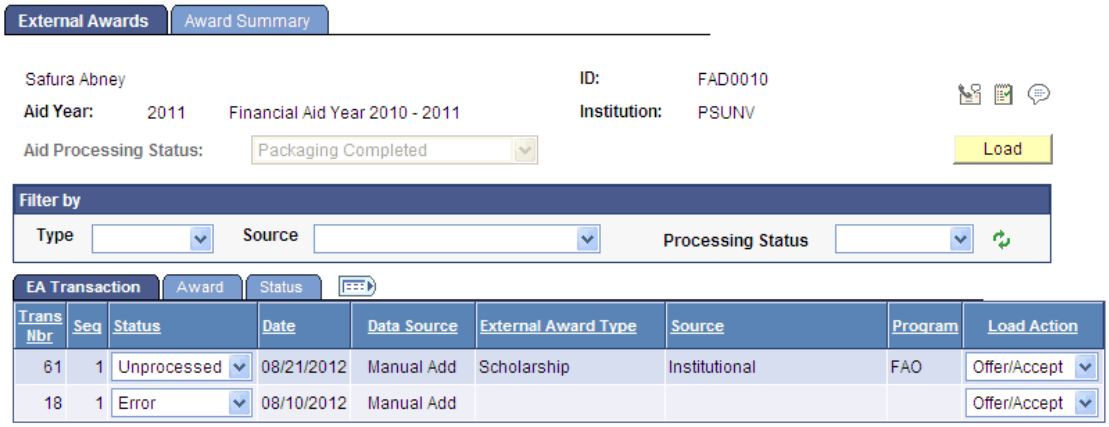
- Managing External Award Data
  Access the Manage External Award Data page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage External Award Data**, and then **Manage External Award Data**).

Viewing and Loading a Student's External Award Data

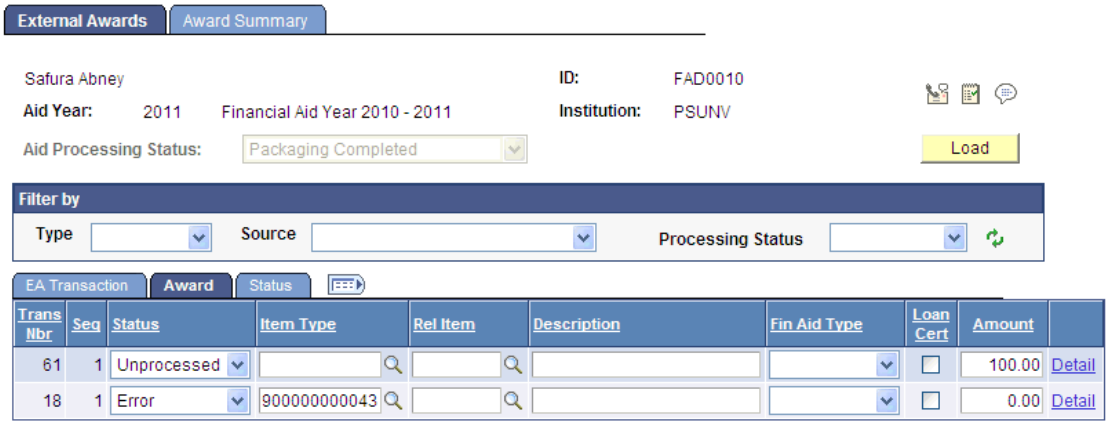
Access the External Awards page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Manage Student External Awards**, and then **External Awards**).

This example illustrates the fields and controls on the External Awards page, EA Transaction tab.

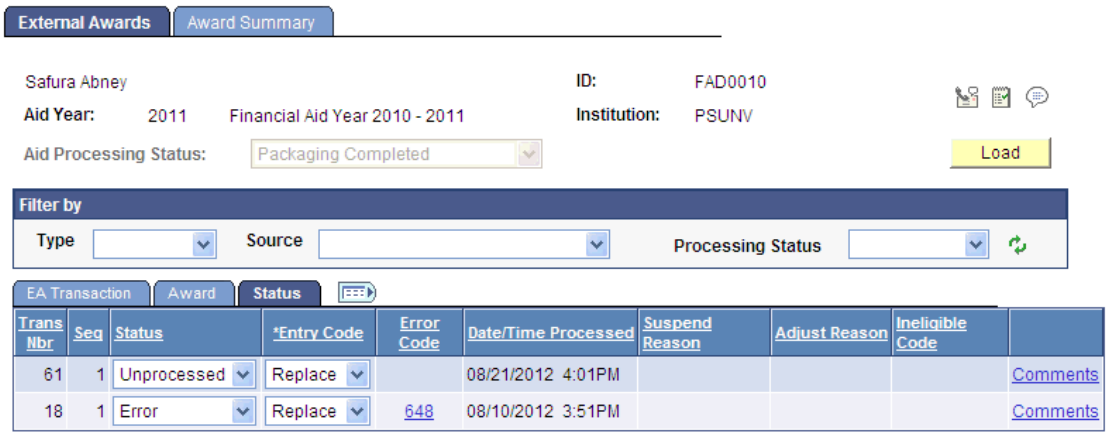
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This example illustrates the fields and controls on the External Awards page, Award tab.



This example illustrates the fields and controls on the External Awards page, Status tab. You can find definitions for the fields and controls later on this page.



This page displays all external award transactions for this ID. Each row of data is keyed by transaction number and sequence number. All relevant external award fields are segmented

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into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all three sets of fields.

You can update the external award transaction until it has a status of *Processed* or *Adjusted.*

You can filter results by type, source, and processing status.

See Managing External Award Data.

Field or Control	Description
Aid Processing Status (Also known as Package Status)	Display-only field. If the Aid Processing status is *Packaging Completed* and you click the **Load** button to run an online External Award Load process, the value changes to *Repackage,* making the student a candidate for the batch Repackaging process. That is, this field is updated after you run the External Award Load process only if the prior status was *Packaging Completed.* You can change the status on this page. During the batch External Award Load process, use the Exclude Equation parameter to prevent selected IDs from having the status change to *Repackaging.* See Loading Data to the Student Award Table.
Load	Click the **Load** button to run the External Award Load process for all transactions for this student that have an *Unprocessed* status.

Processing Data from a File

This section lists prerequisites and discusses how to:

- Load external award data from a data file.
- View summary results of a file load.
- View award disbursement details.

Prerequisites

Before you load external data from an external data file:

- Define a mapping definition in the File Parser utility.
- Associate a Search/Match parameter set with the Mapping definition on the External Award Search Match Rules setup page.

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Pages Used to Process Data from a File

Page Name	Definition Name	Navigation	Usage
External Award Staging Process	SFA_RUN_EA_STAGE	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Process External Award File**, and then **External Award Staging Process**	Load external award data from a data file into the External Award Staging table.
External Award File Summary	SFA_EA_STAGE_INQRY	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **View Data File Staging Results**, and then **External Award File Summary**	View summary results of processing a data file into the External Award Staging table.
Award Disbursement Detail	SFA_EA_DISB_DTL3	Click the **Disbursement** link on the Award tab of the External Award File Summary page.	View award disbursement details.

Loading External Award Data from a Data File

Access the External Award Staging Process page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Process External Award File**, and then **External Award Staging Process**).

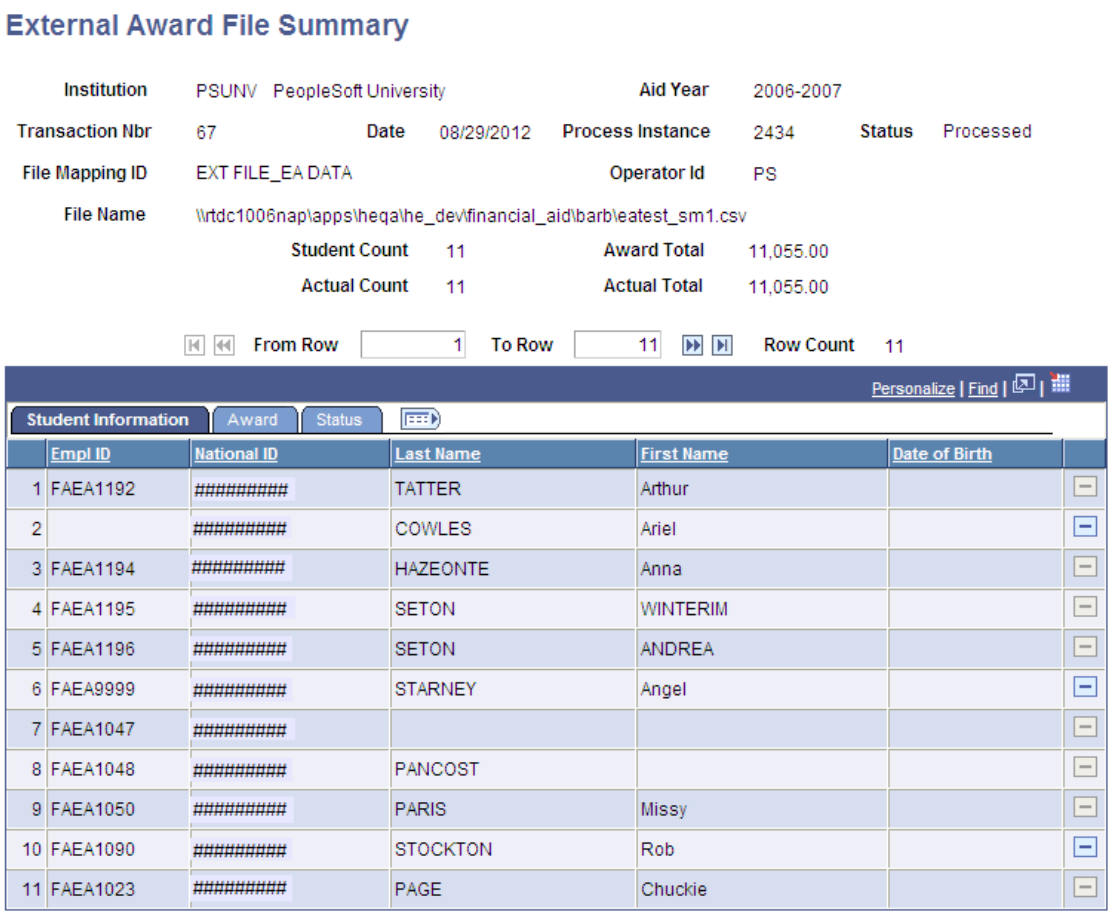
Field or Control	Description
Load Action	Select the **Load Action** to be reported on all data transactions processed during this instance. • *Offer* • *Offer/Accept*. This is the default value.
File Mapping ID	Select *File Mapping ID (Definitions) created in File Parser*. Only mapping definitions created with the External Award Context definition are available for selection.
File Path	Location of the external file or file list name.
File List Indicator	Select this option if you have created a file list to be loaded.

Viewing Summary Results of a File Load

Access the External Award File Summary page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **View Data File Staging Results**, and then **External Award File Summary**).

This example illustrates the fields and controls on the External Award File Summary page, Student Information tab.

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External Award File Summary

Institution	PSUNV PeopleSoft University		Aid Year	2006-2007	
Transaction Nbr	67	Date 08/29/2012	Process Instance	2434	Status Processed
File Mapping ID	EXT FILE_EA DATA		Operator Id	PS	
File Name	\\rtdc1006nap\apps\heqa\he_dev\financial_aid\barb\eatest_sm1.csv				
	Student Count 11		Award Total	11,055.00	
	Actual Count 11		Actual Total	11,055.00	

From Row 1 To Row 11 Row Count 11

Personalize | Find |

Student Information | Award | Status

	Empl ID	National ID	Last Name	First Name	Date of Birth
1	FAEA1192	##########	TATTER	Arthur	
2		##########	COWLES	Ariel	
3	FAEA1194	##########	HAZEONTE	Anna	
4	FAEA1195	##########	SETON	WINTERIM	
5	FAEA1196	##########	SETON	ANDREA	
6	FAEA9999	##########	STARNEY	Angel	
7	FAEA1047	##########			
8	FAEA1048	##########	PANCOST		
9	FAEA1050	##########	PARIS	Missy	
10	FAEA1090	##########	STOCKTON	Rob	
11	FAEA1023	##########	PAGE	Chuckie	

This example illustrates the fields and controls on the External Award File Summary page, Award tab.

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External Award File Summary

Institution	PSUNV PeopleSoft University		**Aid Year**	2006-2007	
Transaction Nbr	67	**Date** 08/29/2012	**Process Instance**	2434	**Status** Processed
File Mapping ID	EXT FILE_EA DATA		**Operator Id**	PS	
File Name	\\rtdc1006nap\apps\heqa\he_dev\financial_aid\barb\eatest_sm1.csv				
	Student Count	11	**Award Total**	11,055.00	
	Actual Count	11	**Actual Total**	11,055.00	

From Row 1 To Row 11 Row Count 11

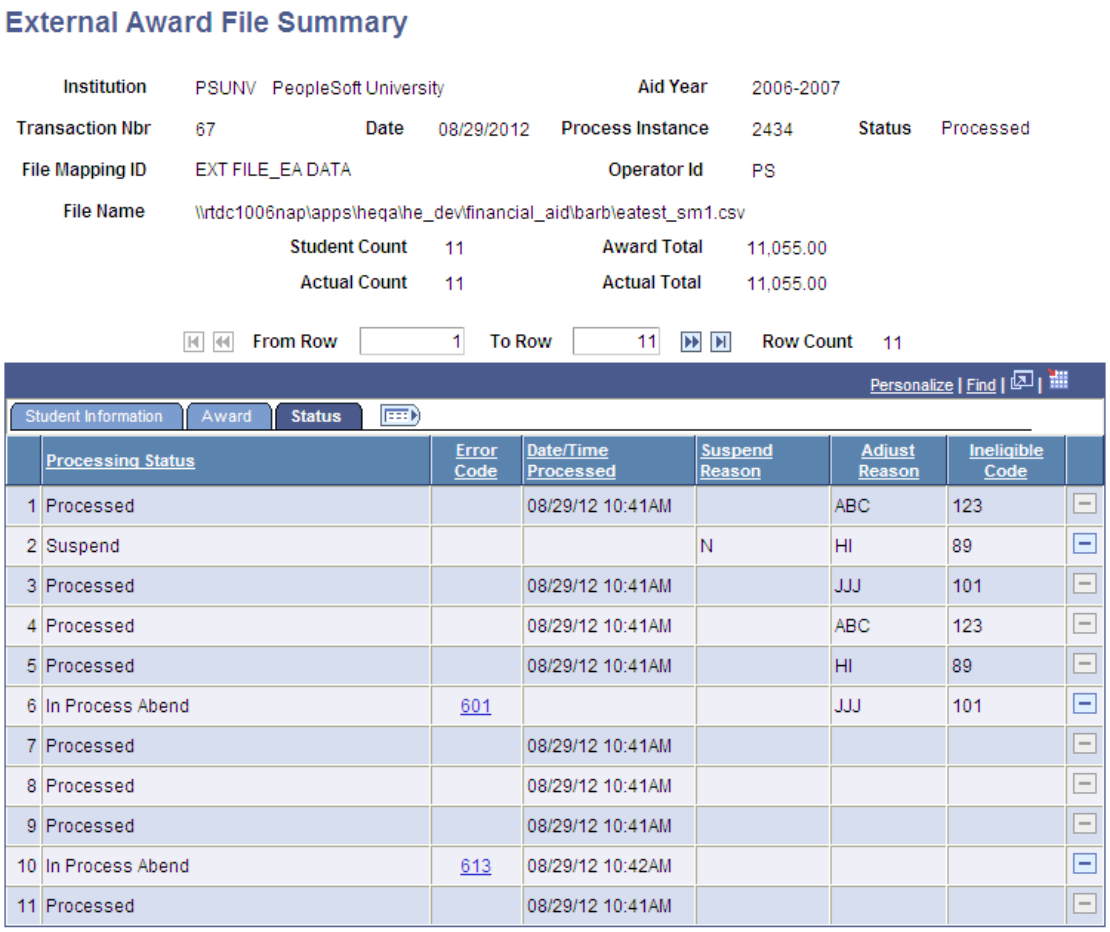
Personalize | Find |

Student Information | Award | Status

	Entry Code	Program	Load Action	Item Type	Loan Cert	Academic Career	Award Amount		
1	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,000.00	Disbursement	
2	Replace	Cal A	Offer/Accept	900000000404	☐		1,001.00	Disbursement	
3	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,002.00	Disbursement	
4	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,003.00	Disbursement	
5	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,004.00	Disbursement	
6	Replace	Cal A	Offer/Accept	900000000404	☐		1,005.00	Disbursement	
7	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,006.00	Disbursement	
8	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,007.00	Disbursement	
9	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,008.00	Disbursement	
10	Replace	Cal A	Offer/Accept	900000000404	☐	UENG	1,009.00	Disbursement	
11	Replace	Cal A	Offer/Accept	900000000404	☐	UGRD	1,010.00	Disbursement	

This example illustrates the fields and controls on the External Award File Summary page, Status tab. You can find definitions for the fields and controls later on this page.

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External Award File Summary

Institution	PSUNV PeopleSoft University		Aid Year	2006-2007	
Transaction Nbr	67	Date 08/29/2012	Process Instance	2434	Status Processed
File Mapping ID	EXT FILE_EA DATA		Operator Id	PS	
File Name	\\rtdc1006nap\apps\heqa\he_dev\financial_aid\barb\eatest_sm1.csv				
	Student Count	11	Award Total	11,055.00	
	Actual Count	11	Actual Total	11,055.00	

From Row 1 To Row 11 Row Count 11

Personalize | Find |

Student Information | Award | Status

	Processing Status	Error Code	Date/Time Processed	Suspend Reason	Adjust Reason	Ineligible Code
1	Processed		08/29/12 10:41AM		ABC	123
2	Suspend			N	HI	89
3	Processed		08/29/12 10:41AM		JJJ	101
4	Processed		08/29/12 10:41AM		ABC	123
5	Processed		08/29/12 10:41AM		HI	89
6	In Process Abend	601			JJJ	101
7	Processed		08/29/12 10:41AM			
8	Processed		08/29/12 10:41AM			
9	Processed		08/29/12 10:41AM			
10	In Process Abend	613	08/29/12 10:42AM			
11	Processed		08/29/12 10:41AM			

This page displays all external award transactions for this transaction number and specific file mapping ID. Each row of data is keyed by a transaction and sequence number. The displayed data has been read from an external data file and loaded into the External Award Staging tables. Fields are segmented into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all three sets of fields.

To view disbursement details, click the **Disbursement** link on the Award tab. To check for errors, select the Status tab and then click the **Error** link to view the message number.

See Managing External Award Data.

Field or Control	Description
Process Instance	Generated by the Process External Award request.
Status	Displays the overall status associated with the loading of external data file.
Student Count	Represents the mapped total row count as read directly from the file. If this field value is not mapped, it is set to the **Actual Count** value.
Actual Count	The calculated count for rows with unique sequence numbers.

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Field or Control	Description
Award Total	Represents the total award amount for all transactions as read from the file. If this field value is not provided on the file, it is set to **Actual Total** value.
Actual Total	Calculated sum of award amount for all rows.

Viewing Award Disbursement Details

Access the Award Disbursement Detail page (click the **Detail** link on the Award tab of the Manage External Award Data page).

You can view the information on this page, but you cannot edit it.

Related Topics

- Adding Award Disbursement Details
  Access the Award Disbursement Detail page (click the **Award Detail** link on the Add External Awards by Type page).

Processing Student Financial Payments

This section provides an overview and discusses how to receive Student Financials payments as external awards.

Understanding Student Financials Payments

Student Financial payments already posted to a customer account are not automatically recognized on a student's aid package. Payment transactions such as waivers, third-party credits, and direct payments must be accounted for and posted to a student's award package to ensure the true effect on a student's total financial aid package and financial need.

The Student Financial Award Feed process takes these steps:

- Selects students based on the Population Selection query and aid year entered on run control page.
- Evaluates payments or waivers from the (SF) PAYMENT_TABLE for the selected students.
- Focuses on (Financial Aid) item types identified on the run control page.
- Gathers (Student Financial) payments with external award attributes entered in the Item Type setup that are mapped to selected (Financial Aid) item types.
- Sums all (Student Financial) payments, both new and changed, by terms applicable to the aid year.
- Posts the summed term amount as an external award transaction to the appropriate (Financial Aid) item type.
- Posts the external award with an **Entry Code** value of *Replace* because all new and changed (Student Financial) payments are summed.

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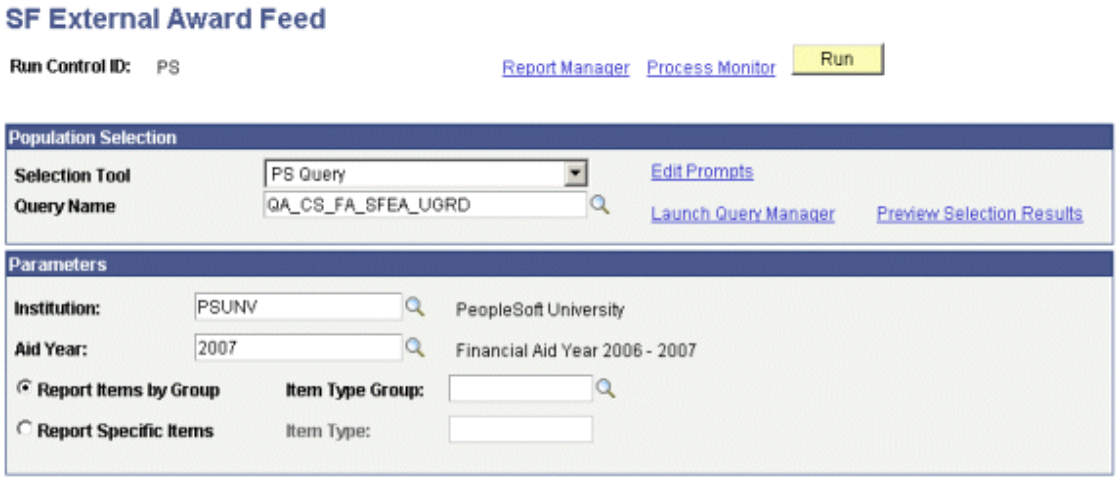
Page Used to Process Student Financial Payments

Page Name	Definition Name	Navigation	Usage
SF External Award Feed	SSF_RUNCTL_EXT_AWD	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Process SF External Award**, and then **SF External Award Feed**	Add external awards transactions based on Student Financial payments already posted to a student's account.

Receiving Student Financials Payments as External Awards

Access the SF External Award Feed page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Process SF External Award**, and then **SF External Award Feed**).

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



The Student Financial External Award Feed process sends payments, waivers, and third-party credits associated with the financial aid item type or item group on the run control, based on the aid year and institution. When more than one business unit maps to the same institution, all eligible credits stored on the PAYMENT_TBL are evaluated for each business unit to report back to financial aid as an external award transaction.

Only students with valid FA_TERM records are considered. Aid year is associated with a payment by comparing the payment's term with the student's FA term record. Financial aid item types are mapped to the payment through the (Student Financial) Item Type setup for the payment, third-party credit, or waiver. If any change occurs in the student's eligible credits, all student credits mapping to the same (Financial Aid) item type for the term and aid year are evaluated to derive the full amount to be sent to the External Award staging tables. Changes are determined by comparing the Payment table payment amount to SSF_PMT_AMT_SENT, which contains the amount that was last sent to Financial Aid.

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> **Note**
>
> Because the Student Financial External Award Feed derives the full amount, when any change is identified in the student's eligible credits, each external award transaction posted is updated with an **Entry Code** value of *Replace* to present the most current status of payments mapped to the appropriate (Financial Aid) item type.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. The **Population Selection** group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See Campus Community Fundamentals: Using the Population Selection Process.

Field or Control	Description
Selection Tool	Select *PS Query*. Depending on your selection, other fields are displayed.
Query Name	Appears only when you select *PS Query*. Select a PS Query that selects a population using the bind record *SSF_EA_BIND*.

The **Edit Prompt** and **Preview Selection Results** links are available when you select *PS Query* and a query designated for the SF External Awards Feed process.

> **Note**
>
> Remember that the process runs more efficiently if you select the **Distinct** check box on the Query Properties page.

See *PeopleTools: Query*.

Parameters

Field or Control	Description
Report Items by Group	Select to identify a range of (financial aid) item types to be evaluated. The Student Financial External Award process evaluates which Student Financial payments to include as an external award, based on the External Award Item Type Cross-Reference setup and the External Award attributes entered on the (Student Financial) item type setup.

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Field or Control	Description
Report Specific Items	Select to identify a specific (Financial Aid) item type to be evaluated. The SF External Award process evaluates which SF payments to include as an external award, based on the External Award Item Type Cross-Reference setup and the External Award attributes entered on the (student financial) item type setup.
Item Type Group	Select an item type group previously defined on the Item Type Group setup. Only item types in the Financial Aid category are considered and must be identified in the External Award Item Type Cross-Reference setup.
Item Type	Select a financial aid item type.

Example of Reporting a Student Financial Payment as an External Award

The following table shows three Student Financial waivers mapped to the same financial aid item type, 900000000470. The Financial Aid office determines how much detail it needs to provide in a student's award package and therefore how many FA item types to use and whether a one-to-one or many-to-one relationship is established.

Financial Aid Item Type Mapped to a Student Financial Payment Item Type

(FA) Item Type	Description	EA Type	EA Source / Program Code	(SF) Item Type	Description
900000000470	Waiver	WVR	SF	350000010100	FA EA Waiver #1
900000000470	Waiver	WVR	SF	350000010200	FA EA Waiver #2
900000000470	Waiver	WVR	SF	350000010300	FA EA Waiver #3
900000000471	General	TPC	SF/C	360000010010	FA EA TPC #1
900000000471	General	TPC	SF	3600000101020	FA EA TPC #2
900000000472	TPC Army	TPC	SF/A	360000010030	FA EA TPC #3
900000000473	Dept Scholarship	SCH	SF	320000000100	FAEA Dept Aid #1
900000000473	Dept Scholarship	SCH	SF	320000000200	FAEA Dept Aid #2
900000000473	Dept Scholarship	SCH	SF	320000000300	FAEA Dept Aid #3

After you determine a high-level mapping strategy, update the External Award Cross-Reference setup and the (SF) Item Type-External Award tab with the correct values.

Example of Student Financial Payment

This example shows payments posted in Student Financials and then reported as an external award in the External Award staging tables.

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Date	Activity	SF Item Type	Term	Amount	FA Item Type	Term	Amount
09/01/2006	Post Tuition Waiver in Student Financials to fall 2006 (0570) term	3500000101100	0570	510.00 USD			
09/03/2006	Post Tuition Waiver in Student Financials to fall 2006 (0570) term.	3500000010200	0570	100.00 USD			
09/03/2006	Post Department Scholarship directly to Customer Account by Student Financials office.	3200000000100	0570	980.00 USD			
09/15/2006	Run Process SF External Award to create External Award transactions in External Award Staging tables.				900000000470 900000000473	0570 0570	610.00 USD 980.00 USD
12/01/2006	Post Tuition Waiver in Student Financials to spring 2007 (0580) term.	3500000101100 3500000010200	0580 0580	522.00 USD 100.00 USD			

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Date	Activity	SF Item Type	Term	Amount	FA Item Type	Term	Amount
12/15/2006	Run Process SF External Award to create External Award transactions in External Award Staging tables.				900000000470	0570 0580	610.00 USD 622.00 USD

On September 15, 2006, the SF External Award process is run and two external award transactions are posted:

- External award transaction for the financial aid item type 900000000470 is based on combining the two different waiver items (350000010100 510.00 USD and 350000010200 100.00 USD), which are combined as a total 0570 term amount of 610.00 USD.
- External award transaction for the financial aid item type 900000000473 is based on the SF posted department scholarship (320000000100 980.00 USD), which is posted as a total 0570 term amount of 980.00 USD.

On December 15, 2006, the SF External Award process is run and one external award transaction that represents the prior 0570 term amounts now contains the 0580 term Waivers Items.

- External award transaction for the financial aid item type 900000000470 is based on combining the two different waiver items (350000010100 510.00 USD and 350000010200 100.00 USD), which are combined as a total 0570 term amount of 610.00 USD.
- External award transaction for the financial aid item type 900000000470 is based on combining the two different waiver items (350000010100 522.00 USD and 350000010200 100.00 USD), which are combined as a total 0580 term amount of 622.00 USD.

Loading Data to the Student Award Table

This section provides an overview and discusses how to:

- Load external awards in batch.
- View External Award Load summary data.

This section also lists external award error messages.

Understanding the External Award Load Process

The External Award Load processing takes these steps:

- Moves the data from the Staging Table to the Student Award table.
- For missing EmplIDs, ensures that students are active in the Campus Solutions database.
- Ensures that each student applied for financial aid for the given institution and aid year.

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- Maps external awards to financial aid item types.
- Determines action to take for duplicate awards.
- Assigns a disbursement plan and split code for each award.
- Takes any necessary packaging actions.
- Posts error-free awards to the Student Award table.
- Updates Need Summary.
- Sends processing status and any accompanying error codes to the Staging table.

Pages Used to Load Data to the Student Award Table

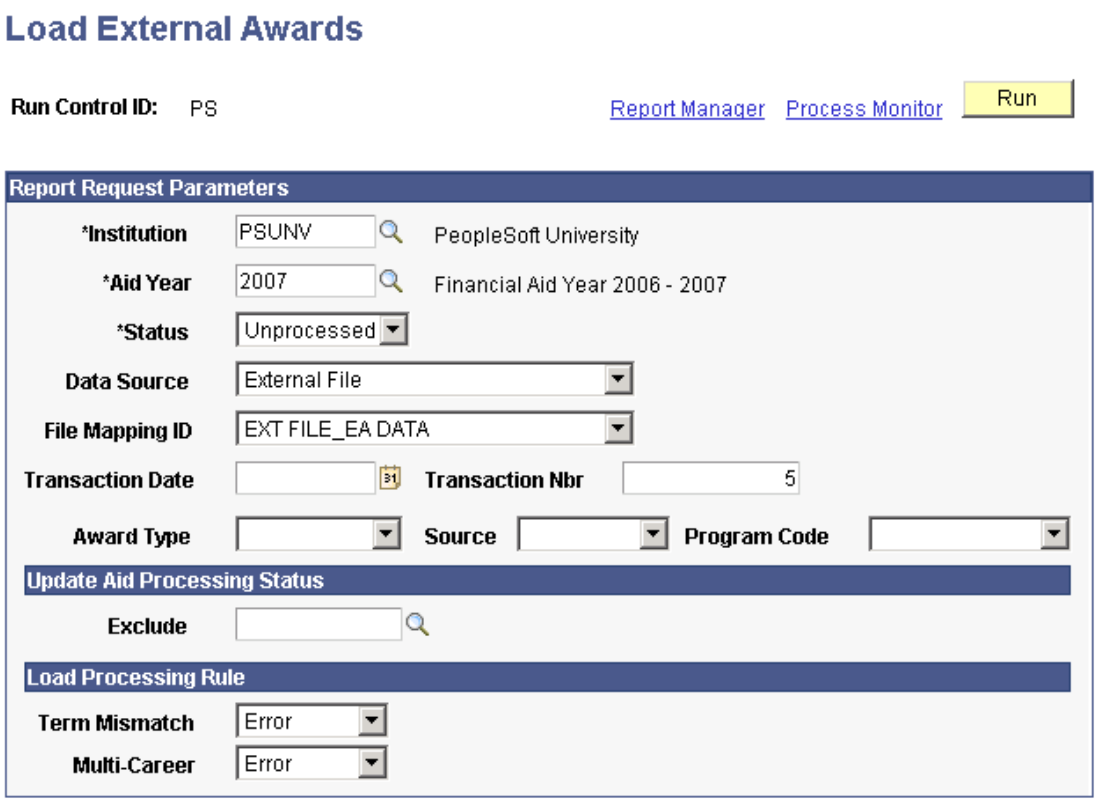
Page Name	Definition Name	Navigation	Usage
Load External Awards	SFA_RUN_EA_LOAD	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Load External Awards**, and then **Load External Awards**	Evaluate external award transactions to post or update student award tables.
External Award Load Summary	SFA_EA_LOAD_HDR	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **External Award Load Summary**, and then **External Award Load Summary**	View summary data, such as the number of students selected, processed, and skipped.
External Award Load Detail	SFA_EA_LOAD_DTL	**Financial Aid**, and then **Awards**, and then **External Awards**, and then **External Award Load Detail**, and then **External Award Load Detail**	View the status of each external award transaction processed during the External Award Load process.

Loading External Awards in Batch

Access the Load External Awards page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **Load External Awards**, and then **Load External Awards**).

This example illustrates the fields and controls on the Load External Awards page. You can find definitions for the fields and controls later on this page.

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Run control provides filtering parameters to focus the selection of external award transactions to be processed. Other parameters control how the Aid Processing status is updated and set rules that guide the External Award Load process when certain student conditions are encountered.

Report Request Parameters

Field or Control	Description
Status	(Required) Select the processing status of external award transactions to be processed.
Data Source	(Optional) Select a value to narrow the selection of transactions to be processed. If you select *External File,* also select a specific file mapping ID to identify the Search/Match parameter rule.
File Mapping ID	(Optional) Select to narrow the selection of transactions to be processed. See **Data Source.**
Transaction Date	(Optional) Select a specific transaction date to narrow the selection of transactions to be processed.
Transaction Nbr (transaction number)	(Optional) Select a specific transaction number to narrow the selection of transactions to be processed.
Award Type	(Optional) Select an external award attribute value to narrow the selection of transactions to be processed.

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Field or Control	Description
Source	(Optional) Select an external award attribute value to narrow the selection of transactions to be processed.
Program Code	(Optional) Select an external award attribute value to narrow the selection of transactions to be processed.

Update Aid Processing Status

Field or Control	Description
Exclude	Select a group of IDs to exclude having the **Aid Processing Status** value change from *Packaging Completed* to *Repackage* after the External Award Load process finishes. These groups are defined using the Equation Editor **(Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Editor).** To decide whether to provide an equation for this option, consider how your institution identifies students as possible candidates for the batch Repackaging process. For example, if you identify all overaward students, regardless of the size of the overaward amount, you would not provide an equation in the **Exclude** option. If a student's aid package is updated with an external award and has an overaward greater than zero and **Aid Processing Status** is *Packaging Completed,* then the student's **Aid Processing Status** is changed to *Repackage.* Or, if you identify students whose overaward is greater than 200.00 USD, you would use the **Exclude** option and an equation that identifies IDs with an overaward less than 201.00 USD. **Note:** This option considers only students whose **Aid Processing Status** is *Packaging Completed* before the External Award Load is run. All other **Aid Processing Status** values remain unchanged.

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Load Processing Rule

Field or Control	Description
Term Mismatch	Select an action to take when a mismatch exists between the term on the external award disbursement data and the actual enrollment data. A term mismatch exists when a term defined on an external award transaction does not match a student's actual enrollment. If a term mismatch condition is met, this option instructs the External Award Load process to set the processing status to one of the following statuses: • *Error:* Default. Set the processing status to *Error* and do not update the student's award package. This option is available only when you run the External Award Load process online. • *Suspend:* Set the processing status to *Suspend* and do not update the student's award package. • *Adjust:* Set the processing status to *Adjust*. The External Award Load process posts award disbursement data into the student's first Disbursement ID of Term.
Multi-Career	Select an action to take when a conflict exists between the career on the external award disbursement data and the actual enrollment data. A multicareer condition exists when a career defined on an external award transaction does not match a student's actual enrollment. If a multicareer condition is met, this option instructs the External Award Load process to set the processing status to one of the following statuses: • *Error:* Default. Set the processing status to *Error* and do not update the student's award package. This option is available only when you run the External Award Load process online. • *Suspend:* Set the processing status to *Suspend* and do not update the student's award package. • *Adjust:* Set the processing status to *Adjust*. The External Award Load process posts award and disbursement data into the student's first career found.

Posted External Awards

New or updated awards are assigned an External Award lock attribute, which is displayed on the Student Aid Package page, Status tab. The lock prevents the award from being overwritten by the Auto or Mass Packaging and Repackaging processes.

Loan Certification Requests

Loan certification transactions are evaluated for eligibility. In the case of a Stafford Loan Certification with a Related item type identified on the external award transaction, if the existing

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package has already been awarded a subsidized or unsubsidized Stafford, the External Award Load process returns a status of *Processed* and an error message number *646 (Student is not eligible for this award).*

> **Note**
>
> Loan Certification Requests awarded during the External Award process should be performed only for loan certification request applications that have already been inbound into the Loan component.

Auto-Cancel Awards

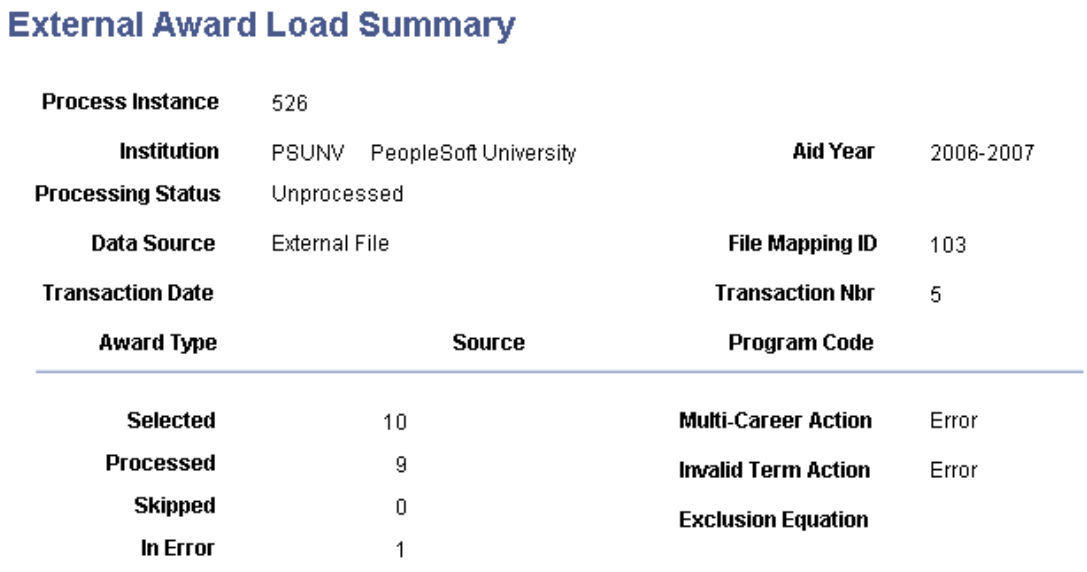
If External Award Sequencing is Enabled, an external award posted with an Auto Cancel item type cancels the Auto Cancel item type and sequences the external award based on the sequence specified.

If External Award Sequencing is not Enabled, an external award posted with an Auto Cancel item type cancels the Auto Cancel item type and sequences the external award immediately following the canceled award.

Viewing External Award Load Summary Data

Access the External Award Load Summary page (**Financial Aid**, and then **Awards**, and then **External Awards**, and then **External Award Load Summary**, and then **External Award Load Summary**).

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



The External Award Load Summary page lists the criteria used to select transactions to be processed. It also shows the selected, processed, skipped, and in error process counts. Verify that the criteria is correct and that the counts are correct. If transactions skipped or in error, use any of the Manage Existing External Award pages to correct wrong data and address any errors reported.

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External Award Error Messages

The following table lists and explains possible External Award Load error messages. These messages are contained in Message Set Number 14402.

Message Number	Message Text	Message Explanation
601	Student is not active for Aid Year specified.	Student is not active for Aid Year specified. No row found in PS_STUDENT_AID.
602	Student not active for Aid Year specified.	Student is not active for Aid Year specified. No row found in PS_STDNT_AID_ATRBT.
603	Student not active for Aid Year specified.	Student is not active for Aid Year specified. No row found in PS_STDNT_AWD_PER.
604	No valid FA Term data found.	No valid FA Term data found. No rows found in PS_STDNT_FA_TERM.
605	More than one active academic career found.	More than one active academic career found.
606	Item Type not found.	Item Type not found. A valid Item Type for the external award could not be found. Check the external award type and source defined and the Item Type being used.
607	Item Type could not be assigned.	Item Type could not be assigned. Multiple values map to the specified external award type and source.
608	Invalid Disbursement Plan and Split Code.	Invalid Disbursement Plan and Split Code. The specified disbursement plan and split code would result in invalid disbursement rows for the student.
609	Unable to assign disbursement plan and/or split code.	Unable to assign disbursement plan, split code, or both. Multiple values meet student's attributes.
610	Invalid term specified.	Invalid item specified. The term specified on a disbursement entry is not a valid term for the student.
611	External Award Report Code not found.	External Award Report Code not found. The report code is required when the same item type has already been awarded.
612	Invalid Report Code (N = New).	Invalid or incorrect Report Code (N = New). This item type already exists in the student's award package and is therefore a duplicate entry.

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Message Number	Message Text	Message Explanation
613	Disbursement IDs not found for specified Disbursement Plan.	Disbursement IDs that correspond to student's term enrollment were not found for specified Disbursement Plan.
614	Unable to create disbursement rows. SQL error on disbursement row insert.	Disbursement IDs that correspond to student's term enrollment were not found for specified Disbursement Plan.
615	Missing or invalid Disbursement ID for an Append or Replace transaction.	When using a Report Code of *Append* or *Replace,* the Disbursement ID was missing or invalid.
616	The sum of scheduled disbursements does not equal the total award amount.	The sum of scheduled disbursements does not equal the total award amount.
617	Unable to assign valid Disbursement IDs.	Unable to assign valid Disbursement IDs for the Term specified on the staging table.
618	Invalid Report Code for loan certification award.	Invalid Report Code used for loan certification award. Loan certifications must use a Report Code value of *New.*
619	Invalid Disbursement Plan for append transaction.	Invalid Disbursement Plan for append transaction. The Disbursement Plan for the append transaction must match the Disbursement Plan for the exiting award.
620	Invalid Disbursement Plan for replacement transaction.	Invalid Disbursement Plan for replacement transaction. The disbursement plan for the replacement award has to match the disbursement plan on the existing, non-zero award.
621	Invalid Disbursement Plan for replacement award.	Invalid Disbursement Plan for replacement award. The disbursement plan for the replacement award is different from the disbursement plan for the existing award and the existing award has non-zero authorized and/or disbursed balances.
622	Charge Priority not found for Item Type.	Charge Priority not found for Item Type.
623	Missing disbursement schedule.	Missing disbursement schedule. The disbursement information must be specified when adjusting or replacing an award with a Split Code value of *XX* (Custom Split).

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Message Number	Message Text	Message Explanation
624	Disbursement Term mismatch.	Disbursement Term mismatch. Unable to find a valid split code for disbursement allocation.
625	Invalid transaction amount.	Invalid transaction amount. The annual award amount, annual disbursement amount, or both is zero.
626	External Award Load	Process completed successfully.
627	External Award Load ERROR	Award accept amount can never be negative on the Assign Fiscal Limits page.
628	External Award Load ERROR	SQL error encountered by FAPPKEAL. Check the log for details.
629	External Award Load ERROR	Application Engine program SFA_EA_LOAD encountered errors. Check the log for details.
630	External Award Load ERROR	The external award load process did not run to successful completion. Check the log for errors.
631	Record Insert Error.	Error creating Application Engine state record SFA_EALOAD_AET.
632	External Award Load ERROR	Error encountered during award Posting process (FAPPKPST).
633	External Award Load ERROR	Error encountered during award Validation process (FAPPKCTL).
634	Same award already exists with non-zero authorized and/or disbursed balances.	The loan certification award already exists with non-zero authorized, disbursed balances, or both.
635	Insufficient process run parameters.	Insufficient parameters. Institution, Aid Year, and Mapping ID are required to run the process.
636	Search/match parameter not found.	Search/match parameter not found. Unable to assign EMPLID.
637	Zero award amount. Award was not posted.	A new award with a zero amount cannot be posted.
638	Award Amount has been adjusted to reflect the Disbursed Amount.	Disbursed Amount is greater than the Award Amount. The award amount has been adjusted to reflect the disbursed amount.

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Message Number	Message Text	Message Explanation
639	Invalid award amount for a Replace transaction.	The transaction award amount is zero, but the disbursed amount is non-zero. The award cannot be posted because it would replace the existing award with a zero award. A disbursement amount greater than the zero award amount cannot be processed.
640	Invalid number of disbursements specified.	The number of disbursements specified is greater than the number of scheduled disbursements for the disbursement plan on the existing award. Either fix the number of disbursements to match the existing award or choose a new disbursement plan. Note that a new disbursement plan can only be used if payments have not been made against the award and it has not been disbursed.
641	Missing or invalid Term for an Append or Replace transaction.	When using a Report Code of *Append* or *Replace,* the disbursement detail must have the correct terms specified when the disbursement IDs are not known. Otherwise, specify the disbursement IDs for all rows.
642	Missing or invalid Term.	When specifying the disbursement allocation, all entries must have the correct term specified if at least one allocation has a term defined. Otherwise, specify the Disbursement IDs or leave both the Disbursement ID and Term fields for all allocations blank.
643	Missing or invalid Disbursement ID.	When specifying the disbursement allocation, all entries must have the appropriate Disbursement ID specified if at least one allocation has a Disbursement ID defined. Otherwise, specify the Term instead or leave both the Disbursement ID and Term fields for all allocations blank.
644	Invalid disbursement allocation specified.	The disbursement allocation is invalid. The Disbursement IDs specified do not match the student's enrollment terms.

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Message Number	Message Text	Message Explanation
645	Invalid Disbursement IDs specified.	One or more Disbursement IDs do not match the Disbursement IDs for the Disbursement Plan assigned.
646	Student is not eligible for this award.	The award has been processed but it was not posted to the student's financial aid package. The student is not eligible for this award.
647	External Award Load error.	Error encountered during call to Equation Processor (FAPEQRUN).
648	Sum of disbursed term amounts does not equal the total amount disbursed.	The sum of the disbursed balances in the disbursement detail does not equal the total amount disbursed.
649	Invalid amount specified. Amount is less than zero.	Invalid amount specified. Amount is less than zero.
650	Zero amount for Append transaction.	Zero amount for Append transaction. To set the award amount to zero, use an **Entry Code** value of *Replace*. Otherwise update the transaction to reflect the correct amount to append.
651	New award with zero amount not posted. This award cancels an existing award (auto-cancel).	The award was processed but was not posted to the student's financial aid package. The zero amount indicates student is not eligible for this award and canceled an existing award matching the auto-cancel item.
652	Disbursement detail is needed when appending to the Disbursed amount.	You must provide specific term disbursement details when requesting to move disbursed amounts from the External Award staging tables to the Awarding tables using the 'Append' reporting code.
654	There is an existing Award in non Offered status.	You are trying to load an Offered award, but there is an existing Award in a non Offered status.
655	Disbursed amount present in Offer Award.	Transaction is being loaded with Offer award action and there are Disbursed amounts greater then zero present in the External Award transaction. You should either change the award action to Offer/Accept action or nullify Disbursed amounts.

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Message Number	Message Text	Message Explanation
679	Unable to assign a Packaging Sequence Number (PKG_SEQ_NBR) that would sequence the external award as desired.	When attempting to insert the external award to the desired sequence, there was a conflict. This can occur when the incoming award is trying to be sequenced to a number that already exists on the student package. Often times rerunning the load process will resolve the issue.

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32

Managing Repackaging

Understanding Repackaging

Using repackaging, you can award financial aid for groups of students. An equation, a PS Query, or an external file can identify the group of students for repackaging. You can then associate one or more repackaging plans to that population. You can evaluate your selected population and the repackaging plan associated with each student first. The system selects the optimum repackaging plan for each student based on the combination of your repackaging equations and the processing order of the repackaging plan. Then the system applies the repackaging plan against those selected students, awarding each student based on the defined repackaging plan rules.

Three processes are run as part of repackaging. The first process selects students for evaluation. The second process assigns repackaging plans to students. The third process reviews the student's eligibility, the program rules, and other eligibility criteria and then decreases, increases, or validates existing awards, or assigns new awards to students using the assigned repackaging plans. After the first two processes, you can review the students being selected and the assigned repackaging plans. You can also review the order in which the students are repackaged, again by repackaging plan. You can delete students who should not be repackaged. Finally, you can run the third process in live mode or in simulation mode to review expected repackaging results.

Before repackaging, consider the results that you want the system to produce according to your institution's repackaging philosophies. Determine the student attributes to use in the repackaging equations to select the correct students for each repackaging plan. Review the criteria that each repackaging plan uses to select students. If some of the selected students cannot be matched to any of your repackaging plans, review the list of these students to determine why they did not get matched. Adjust your equations to ensure that these students are assigned correctly.

Unlike Packaging, during Repackaging locked awards are always preserved and unchanged, even if the student is in an overaward situation.

During the loading of external awards, an EA lock attribute is set, such that external awards are treated as locked awards during Repackaging. External awards are always preserved and unchanged, even if the student is in an overaward situation. When the EA lock is set, you cannot remove it.

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> **Note**
>
> Your repackaging plans must be established before you begin repackaging; if you change the selection criteria in either Equations or PS Query, rerun the Batch Repackaging Selection routine. If you make changes to your repackaging plans, rerun the Assign Repackaging plans routine before running the Batch Repackaging process. Changing any repackaging plan selection criteria (tied at the plan level) after students have been assigned to repackaging plans may produce incorrect or undesirable results.
>
> You should run Need Summary Validation before performing any Repackaging activities.

Related Topics

- Setting Up a Repackaging Plan
  This section discusses how to:
- Need Summary Validation
  Sometimes a manual change to the student's budget does not automatically propagate to the need summary totals. In this case, if you create selection criteria that rely on need-related elements, such as Unmet Need, Overaward Need, Unmet COA, or Overaward COA, the system is not using the most current calculated values.
- Loading Data to the Student Award Table
  This section provides an overview and discusses how to:

Running the Need Summary Validation Process

This section discusses how to select students for Need Summary Validation.

Page Used to Run the Need Summary Validation Process

Page Name	Definition Name	Navigation	Usage
Select Students for Need Summary Validation	SFA_RUN_NEEDUPD	**Financial Aid**, and then **Awards**, and then **Need Summary Validation**, and then **Select Students for Need Summary Validation**	Update the needs summary to reflect changes made to Cost of Attendance (COA) or Effective Family Contribution (EFC)/ Student Aid Index (SAI).

Selecting Students for Need Summary Validation

Access the Select Students for Need Summary Validation page (**Financial Aid**, and then **Awards**, and then **Need Summary Validation**, and then **Select Students for Need Summary Validation**).

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security.

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Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See Campus Community Fundamentals: Using the Population Selection Process.

Field or Control	Description
Selection Tool	Select one of these values: *Equation Engine, PS Query,* or *External File.* Additional parameters appear for your selected tool.
Query Name	For PS Query, select a population selection query that joins with the bind record SFA_BNSV_BIND, which does not require a career.

Performing Batch Repackaging

This section discusses how to:

- Select students for repackaging.
- Review students selected for batch repackaging.
- Assign repackaging plans to selected students.
- Review repackaging plans assigned by query.
- Review repackaging plans by students.
- Repackage groups of students.
- Review batch repackaging summary.
- Review eligibility and need after repackaging.
- Review batch repackaging details.
- Review batch repackaging errors.

Pages Used to Perform Batch Repackaging

Page Name	Definition Name	Navigation	Usage
Select Students for Repackaging	SFA_RUN_RPKG_SEL	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **Select Students to Repackage**, and then **Select Students for Repackaging**	Define the population of students to repackage for award eligibility.
Batch Repackaging Students	SFA_RPKG_STDNTLIST	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Selected Students**, and then **Batch Repackaging Students**	View a list of students selected for repackaging. Optionally, select *Valid* or *Invalid* for **Process Status.**

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Page Name	Definition Name	Navigation	Usage
Assign Repackaging Plan	SFA_RUN_RPKG_ASN	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **Assign Repackaging Plans**, and then **Assign Repackaging Plan**	For a selected population, assign one or more repackaging plans.
Batch Repackaging Plans Assigned	SFA_RPKG_PLAN_INQ	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Assigned Plans**, and then **Batch Repackaging Plans Assigned**	View all the students assigned to each repackaging plan.
Batch Repackaging Students by Plan	SFA_RPKG_STDNTPLAN	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Students by Plan**, and then **Batch Repackaging Students by Plan**	View individual students and the repackaging plan assigned to each, sorted by specified sort field.
Repackage Students in Batch	SFA_RUN_RPKG	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **Process Batch Repackaging**, and then **Repackage Students in Batch**	Repackage a select group of students using their assigned repackaging plans.
Batch Repackaging Summary	SFA_BRPKG_SUMM	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Summary**, and then **Batch Repackaging Summary**	Display all repackaging plans, number of students selected, number repackaged, and number not repackaged.
Eligibility and Need	SFA_BRPKG_STUDTL	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Details**, and then **Eligibility and Need**	View eligibility and need details for a student after repackaging.
Award Detail	SFA_BRPKG_AWDDTL	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Details**, and then **Award Detail**	View award details for a student after repackaging.

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Page Name	Definition Name	Navigation	Usage
Batch Repackaging Errors	SFA_BRPKG_ERROR	**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Errors**, and then **Batch Repackaging Errors**	View message number and error detail for each student for whom repackaging failed.

Selecting Students for Repackaging

Access the Select Students for Repackaging page **(Financial Aid**, and then **Awards**, and then **Repackaging**, and then **Select Students to Repackage**, and then **Select Students for Repackaging).**

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See Campus Community Fundamentals: Using the Population Selection Process.

Select the **Population Selection** check box.

Field or Control	Description
Population Selection	Select to use Population Selection to define the student population.
Selection Tool	Appears if **Population Selection** check box is selected. Select from *Equation Engine,* **PS Query,** or *External File.* Additional parameters are displayed for your selected tool.
Query Name	Appears only when PS Query is selected. Select a PS Query that selects a population using one of these bind records • SFA_BRPKGX_BIND, if population selection is not based on career • SFA_BRPKG_BIND, if population selection is based on career
Equation Name	If you select *Equation Engine,* the **Equation Name** field appears. Select an equation that is defined with the application prompt Batch Repackaging Selection.

Processing Status Selection

If the **Population Selection** check box is not selected, the Processing Status Selection appears.

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Field or Control	Description
Aid Processing Status	Select *Repackage* or any status that indicates that the student has been previously packaged and needs to be reevaluated. The External Award Load process assigns the *Repackage* status to any student who has a Loan Certification Request as an external award or if the student's Aid Processing status is *Complete.*

Reviewing Students Selected for Batch Repackaging

Access the Batch Repackaging Students page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Selected Students**, and then **Batch Repackaging Students**).

Field or Control	Description
Process Status	Indicates whether the student is processed *(Valid)* or not processed *(Invalid)* in the next Repackaging run.

You can delete the student's row or change the Process status to *Invalid* to remove a student from this repackaging batch. If students have multiple careers, a row exists for each career for which they can be repackaged.

Assigning Repackaging Plans to Selected Students

Access the Assign Repackaging Plan page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **Assign Repackaging Plans**, and then **Assign Repackaging Plan**).

From the **Selection Definition** list, select the name of the student group defined on the Select Students for Repackaging page. Then define the repackaging plan for this group of students.

Repackaging Plan Parameters

Field or Control	Description
Career	Select the academic career to process during this Repackaging run.
Repackaging Plan	Select from the list of repackaging plans for this aid year and career.

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Field or Control	Description
Sort Field	Select a field on which to sort students within each plan. Then select ascending or descending order from the **Sort Order** field. Sort field and sort order determine the order in which students are repackaged. For example, to repackage students with the lowest Federal EFC/SAI first and students with the highest Federal EFC/SAI last, select *FED_EFC* and then a sort order of *Ascending*. Select from: • *ADJ_PAR_CONTRIB* (Adjusted Parent Contribution) • *AGI_PAR* (Parents' Adjusted Gross Income) • *AGI_STU* (Students' Adjusted Gross Income) • *EMPLID* (Employee ID) • *FED_EFC* (Federal Effective Family Contribution) • *FED_NEED* (Federal Need) • *FED_PARENT_CONTRB* (Federal Parent Contribution) • *FED_STDNT_CONTRB* (Federal Student Contribution) • *INST_EFC* (Institutional Effective Family Contribution) • I*NST_PARENT_CONTRB* (Institutional Parent Contribution) • *INST_STDNT_CONTRB* (Institutional Student Contribution) • *PRORATED_EFC* (Prorated Effective Family Contribution) • *TRANS_PROCESS_DT* (Transaction Process Date) **Note:** Do not use *FED_EFC* for repackaging plans that have a non-standard award period. FED_EFC represents the PRIMARY_EFC, which is the 9–month EFC/SAI that is synonymous with the academic award period. Therefore, all non-standard award period FED_EFC values equal 0.00. If you sort by FED_EFC for non-standard plans, the system defaults the sort order to EMPLID.
Sort Order	Based on the selected sort field, select *Ascending* to order students from lowest to highest or *Descending* to order students from highest to lowest. See **Sort Field.**

Reviewing Repackaging Plans Assigned by Query

Access the Batch Repackaging Plans Assigned page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Assigned Plans**, and then **Batch Repackaging Plans Assigned**).

To further identify each repackaging plan, the page lists the student's career, the sort field and order from the Assign Repackaging Plan page, and the plan order from the repackaging plan setup.

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In this example, Patrick Quijano (FARPK0045) did not meet any of the selection criteria of the repackaging plans defined on the Assign Repackaging Plans page. The batch routine did not assign him a repackaging plan.

The **Sort Field** field displays the value of the **FED_EFC** sort field, which was defined on the Assign Repackaging Plans page.

Reviewing Repackaging Plans by Students

Access the Batch Repackaging Students by Plan page (**(Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Students by Plan**, and then **Batch Repackaging Students by Plan**).

For each repackaging plan, the page displays the repackaging plan ID, career, and sort field and sort order from Assign Repackaging Plan page. The plan order is the processing order for the repackaging plan from the repackaging plan setup.

For each repackaging plan, the selected students are listed as sorted by the sort field and sort order. In this example, the students are listed in ascending FED_EFC order, as defined on the Assign Repackaging Plans page. The **Sort Field** column, such as FED_EFC, lists the FED_EFC value.

Repackaging Groups of Students

Access the Repackage Students in Batch page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **Process Batch Repackaging**, and then **Repackage Students in Batch**).

Field or Control	Description
Selection Definition	Select the name of the student group defined on the Select Students for Repackaging page.
Methodology	Select which need analysisMethodology to use: *Federal*, *Institutional*, or *Both*. This is an optional field where Federal is the default value. It is an information-only field that allows users to define with which Methodology the batch was repackaged.
Live	Select this mode to run the process and commit the awards to the database. This includes tables such as student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log. **Note:** Oracle recommends that you run in Simulation mode at least once before running in Live mode.
Simulation	Select this mode to simulate and view results. You can then refine your repackaging plan rules and rerun Batch Repackaging Simulation to produce the desired award amounts. When you are satisfied with the Simulation results, rerun Batch Repackaging in **Live** mode.

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Reviewing Batch Repackaging Summary

Access the Batch Repackaging Summary page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Summary**, and then **Batch Repackaging Summary**).

Field or Control	Description
Batch Number	The number that is assigned to the batch of students when you run the Repackaging process.
Batch Date Time	The date and time that you ran the Repackaging process for this batch of students.
Live vs. Simulation	Indicates whether you ran the Repackaging process in live or simulation mode. Values are: *Live:* The Repackaging process updated all award-related tables. *Simulation:* You can review the results of the Repackaging process, but award-related tables were not updated.
Methodology	Displays which need analysisMethodology was specified during the repackaging run: *Federal*, *Institutional*, or *Both*.
Repackaging Plan ID	Identifies the repackaging plan used in this Repackaging process.
Total Selected	The total number of students assigned to this repackaging plan.
Total Packaged	The total number of students who were successfully repackaged using this repackaging plan.
Total Not Packaged	The total number of students who were assigned this repackaging plan but did not receive any awards because of one or more errors.

Reviewing Eligibility and Need After Repackaging

Access the Eligibility and Need page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Details**, and then **Eligibility and Need**).

This information is for a single repackaging plan. To view other students, use the **Eligibility Summary** scroll arrows. To view further information for this student, use the **Need Summary by Award Period** scroll arrows.

Eligibility Summary

Field or Control	Description
Sequence	Indicates the order in which students were repackaged during the Repackaging process.
Federal Dependency Status	Indicates whether the student is dependent or independent under federal methodology.

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Field or Control	Description
Institutional Dependcy Status (institutional dependency status)	Indicates whether the student is dependent or independent under institutional methodology.
Federal PELL Eligibility	Indicates whether the student is eligible to receive a Pell Grant.
Received First Bachelor Degree	Indicates whether the student has already received his or her first bachelor's degree.
Title IV Eligibility	Indicates whether the student is eligible to receive federal Title IV aid.

Reviewing Batch Repackaging Details

Access the Award Detail page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Details**, and then **Award Detail**).

All awards in the repackaging plan are listed as zero or nonzero awards. Nonzero awards display a link to the scheduled disbursements.

Field or Control	Description
Student Packaging Sequence	Displays the order in which students were repackaged during the Repackaging process.
Sequence	The sequence number is automatically assigned in increments of ten when awards are entered.
Item Type	The financial aid item type of the student's award.
Disbt Plan (disbursement plan)	The disbursement plan that is assigned to the student's award.
Split Code	The split code of the student's award, which indicates how the award is split for disbursement to the student.
Offer Amount	If the offered amount for an award is 0.00, then the student was not eligible for that particular award or it was an unlocked, pre-existing award. The zero awards are not visible after the student's award package is posted.
Message	Click this link to access the Batch Repackaging Message page and view the reason that the student did not receive this award.
Disbursement	Click this link to access the Batch Repackaging Disbursement page and view scheduled disbursement detail for an award.

Reviewing Batch Repackaging Errors

Access the Batch Repackaging Errors page (**Financial Aid**, and then **Awards**, and then **Repackaging**, and then **View Batch Repackaging Errors**, and then **Batch Repackaging Errors**).

Only students who had serious errors, such as students who had their financial aid term deleted, are in this list.

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Field or Control	Description
Batch #	The batch number identifies the particular Repackaging session.
Batch Date Time	The date and time that the Repackaging session was run.
Total Not Packaged	The total number of students who were assigned to the repackaging plan but were not repackaged due to an error.
Error Sequence	The key by which the error data is sorted.
ID	The ID of the student who was not repackaged.
Message Number	Click to view the error message.

Repackaging Error Messages

Message Number	Message Text	Explanation
9221	Repackaged award does not exist; Item Type rejected.	This item type was entered into the Packaging process during repackaging and is marked as a change or cancel. However, the item type does not exist at this stage in the student's current package. As a result, it is being discarded.
9223	Repackaging: Item Type award amount has been decreased.	This item type is being processed in Repackaging for a decrease, and has either been decreased to a lower award amount or set to a 0.00 value and canceled.
9224	Repackaging: Item Type Increase does not meet increase threshold; rejected.	This item type is being processed in Repackaging for an increase, but the need or cost of attendance threshold for the package has not been met. As a result, the item type is rejected.
9225	Item Type with disbursements canceled.	This disbursed award has been canceled. The item type does not meet disbursement protection rules.
9226	Item Type decrease does not meet decrease threshold; rejected.	This item type is being processed in Repackaging for a decrease, but the need or cost of attendance threshold for the package has not been met. As a result, the item type is rejected.
9506	This student was not assigned to a Packaging, or Repackaging, Plan.	The student did not meet the selection criteria for the packaging or repackaging plans defined for the specified career.
9528	Award was auto-canceled.	The award was canceled by an Auto Cancel item type.

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Message Number	Message Text	Explanation
9544	Invalid equation data for Selection Criteria at the Packaging, or Repackaging, Plan level.	Incorrect or inconsistent equation data is associated with the selection criteria at the packaging or repackaging plan level.
9590	Student has no awards for the specified academic career.	The student cannot be repackaged because no awards exist for the specified academic career.
9591	Student does not have a Packaging Plan.	The Repackaging rule is Original Packaging Plan, but the packaging plan ID is missing from STDNT_AID_ATRBT. Please contact your system administrator for assistance.
9592	Number of Auto-cancel Item Types exceeds the size of an internal table.	The total number of auto-cancel item types exceeds the size of an internal table. Please contact your system administrator for assistance.
9593	Unable to sequence new award as desired.	The system was unable to assign a PKG_SEQ_NBR that would sequence the new award as desired. Please contact your system administrator for assistance.
9594	No awarding from Related Item Type Group.	The system was unable to award any of the item types specified for a related item type group.

Performing Online Repackaging

You should run Need Summary Validation before performing any Repackaging activities.

This section discusses how to repackage an individual student.

Related Topics

- Awarding Online
  This section discusses how to:

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Pages Used to Perform Online Repackaging

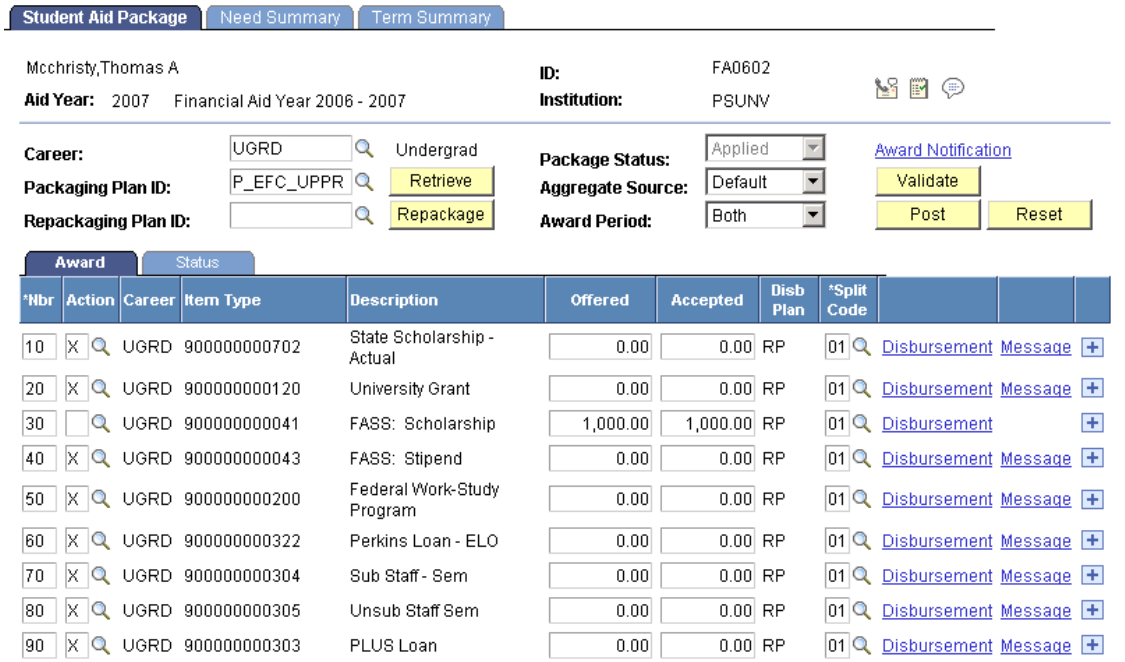
Page Name	Definition Name	Navigation	Usage
Student Aid Package	STDNT_AWARD_ENTRY 3	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Student Aid Package**	Use this page for manual repackaging, auto select repackaging, or auto repackaging. Auto select repackaging and auto repackaging can be combined with manual repackaging in the same online repackaging session.
Professional Judgement	STDNT_AWARD_ENTRY 4	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Invoke Professional Judgement**, and then **Professional Judgement**	Use professional judgement to override all federal and aggregate rules except for fiscal limits when repackaging online. Repackage students without a budget. All item types awarded from this component are set to PJ locked.
Packaging Status Summary	STDNT_AID_PACKAGE	**Financial Aid**, and then **View Packaging Status Summary**, and then **Packaging Status Summary**	View the repackaging plan ID for a student who has been repackaged.

Repackaging an Individual Student

Access the Student Aid Package page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Student Aid Package**) or the Professional Judgement page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Invoke Professional Judgement**, and then **Professional Judgement**).

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

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Common Page Information

Field or Control	Description
Career	The active career for the student to be used for repackaging at this time. If the student has only one career, it is entered into the field by default. If the student has multiple careers, choose from among the active careers for the student, which are defined on the Financial Aid Term record. After you select a career, do not change this field until after you click the **Post** button or the **Reset** button. This prevents you from changing awards for more than one career at a time. Only the repackaging plans and disbursement plans associated with the active career are available during this session. **Note:** If the student has only one career for the aid year, that career is entered into the **Career** field by default and you do not need to select a career.
Repackaging Plan ID	Either select the repackaging plan from the list to use Auto Repackaging or leave the **Repackaging Plan ID** field blank to use Auto-Select Repackaging. For Auto-Select Repackaging, the system selects the repackaging plan that has the lowest sequence number of the plans for which the student qualifies and populates the **Repackaging Plan ID** field.

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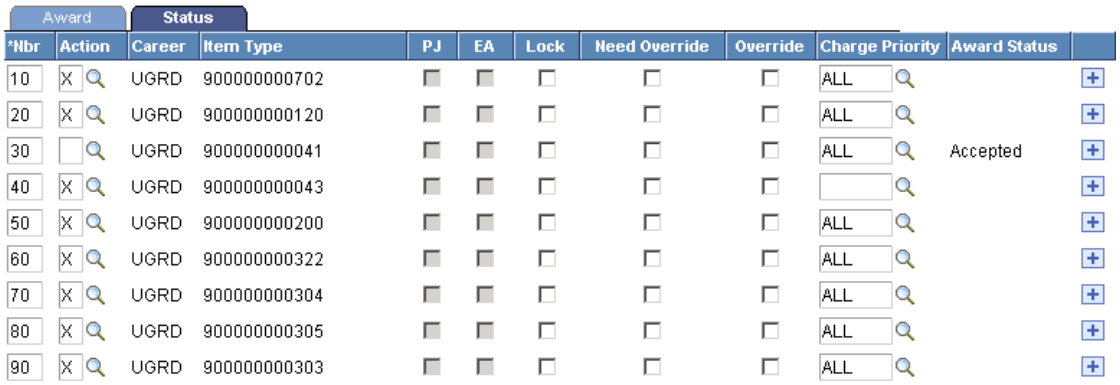
Field or Control	Description
Repackage	Click this button and the system returns award results and the corresponding disbursement plan and split code data. After you post the repackaging results, the repackaging plan ID is displayed on the Student Aid Package, Professional Judgement, and Packaging Status Summary pages.
Award Period	Provides the Repackaging routine with the intended award period processing mode for the award period that you are currently repackaging. The routine uses this information to determine automatically which existing awards are active or passive. The award period that you select functions like the repackaging plan award period attribute in the Repackaging Plan setup in the determination of passive or active mode for existing awards. Values are: *Both:* You are currently repackaging the student for both award periods. This is the default value. The Repackaging routine reevaluates all existing awards, processing all awards as active awards. When you select *Both*, all awards are available for reevaluation. *Academic:* You are currently repackaging the student for the academic award period (AAP) only. The Repackaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the AAP or for both award periods. The Repackaging routine processes all other existing awards as passive awards. *Non-Std* (nonstandard): You are currently repackaging the student for the non-standard award period (NSAP) only. The Repackaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the NSAP or for both award periods. The Repackaging routine processes all other existing awards as passive awards.
Reset	Click to clear this instance.
Post	Click to save the results to the student award table.

Status tab

Select the Status tab.

This example illustrates the fields and controls on the Student Aid Package page: Status tab. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Lock	Unlike Packaging, during Repackaging locked awards are always preserved and unchanged. Even if the student is in an overaward situation, Repackaging always retains the locked award in its entirety.
EA (external award)	During the loading of external awards, this EA lock attribute is set. External awards are treated as locked awards during Repackaging. External awards are always preserved and unchanged, even if the student is in an overaward situation. You cannot remove the EA lock.

Review a Repackaging Result

This section discusses:

- Repackaging process behavior.
- Example of a decrease repackaging plan.

Repackaging Process Behavior

During the Repackaging process, the system updates the Unmet/Overaward Need and Unmet/Overaward COA totals as each award is adjusted. The system does not wait until all awards have been adjusted to calculate these Need Summary totals. The resulting Unmet/Overaward Need and Unmet/Overaward COA values determine whether further reductions or adjustments are necessary.

For the Decrease – Bottom Up Repackaging rule, the system reduces the student's package from bottom up (highest to lowest sequence), but calculates the Need Summary from top down (lowest to highest sequence). If the student's package contains Special Need/Cost awards and the Repackaging Plan is Decrease – Bottom Up, because the system updates the Need Summary totals top down after each award has been reduced, the characteristics of that Special Need/Cost award can change from completely replacing EFC/SAI to partially replacing EFC/SAI to completely reducing Unmet Need.

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Example of a Decrease Repackaging Plan

The Decrease Repackaging Plan example focuses on the FASS Scholarship, a Special Need/Cost award, to highlight the changing nature of the Meet Need/Cost attribute. This behavior is similar to a Stafford Unsub. With each step in the Repackaging example, the FASS Scholarship amount progresses from completely replacing EFC/SAI to completely reducing Unmet Need.

Initially, the student was awarded 740 USD FASS Scholarship. During Repackaging, because the student's EFC/SAI is reduced to 560 USD and because this is a Special Need/Cost award, Repackaging reduces the award to match the EFC/SAI: The original award of 740 less EFC/SAI of 560 equals 180. Therefore, the system reduces the original award by 180.

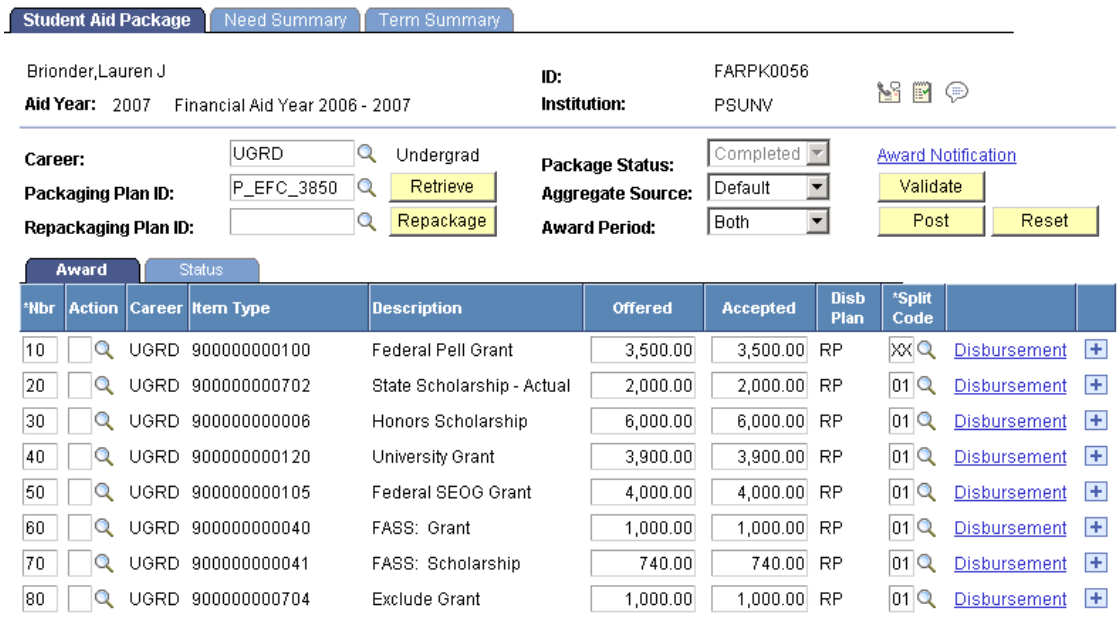
Revised award = 560 (740 – 180 = 560).

When the system determines that the award is 560 USD, it preserves that award in the student's package. However, because that award is defined as Special/Need Cost, its attribute changes from completely replacing EFC/SAI to completely reducing Unmet Need.

Original Package Awards

The Student Aid Package page displays the student's initial set of awards.

This example illustrates the fields and controls on the Original Package, Student Aid Package page. You can find definitions for the fields and controls later on this page.



This table lists the relevant attributes for the original awards.

Sequence	Award	Meet Need/Cost	Lock
10	Federal Pell Grant	Straight Need/Cost	Unlocked
20	State Scholarship	Straight Need/Cost	Unlocked
30	Honors Scholarship	Special Need/Cost	Unlocked

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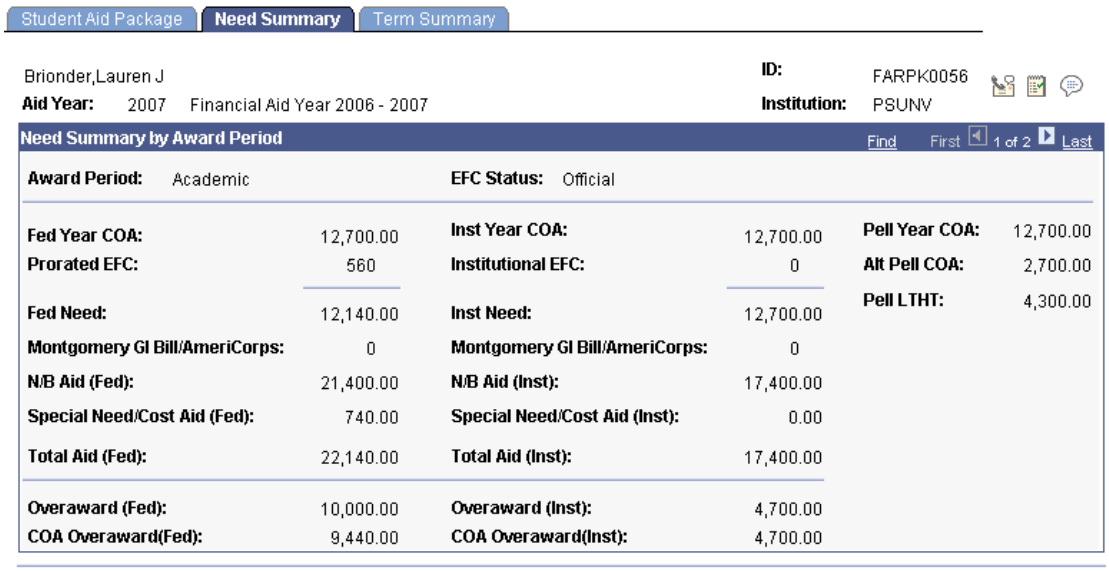
Sequence	Award	Meet Need/Cost	Lock
40	University Grant	Straight Need/Cost	Unlocked
50	Federal SEOG Grant	Straight Need/Cost	Unlocked
60	FASS Grant	Straight Need/Cost	Locked
70	FASS Scholarship	Special Need/Cost	Unlocked
80	Exclude Grant	Straight Need/Cost	Locked

After the original package is made to the student, a change to COA or EFC/SAI occurs that forces the student into an overaward situation. As a result, the student is overawarded in both Need and COA.

Original Need Summary Totals

The Need Summary page displays the student's need summary totals after Packaging.

This example illustrates the fields and controls on the Need summary totals after Packaging. You can find definitions for the fields and controls later on this page.



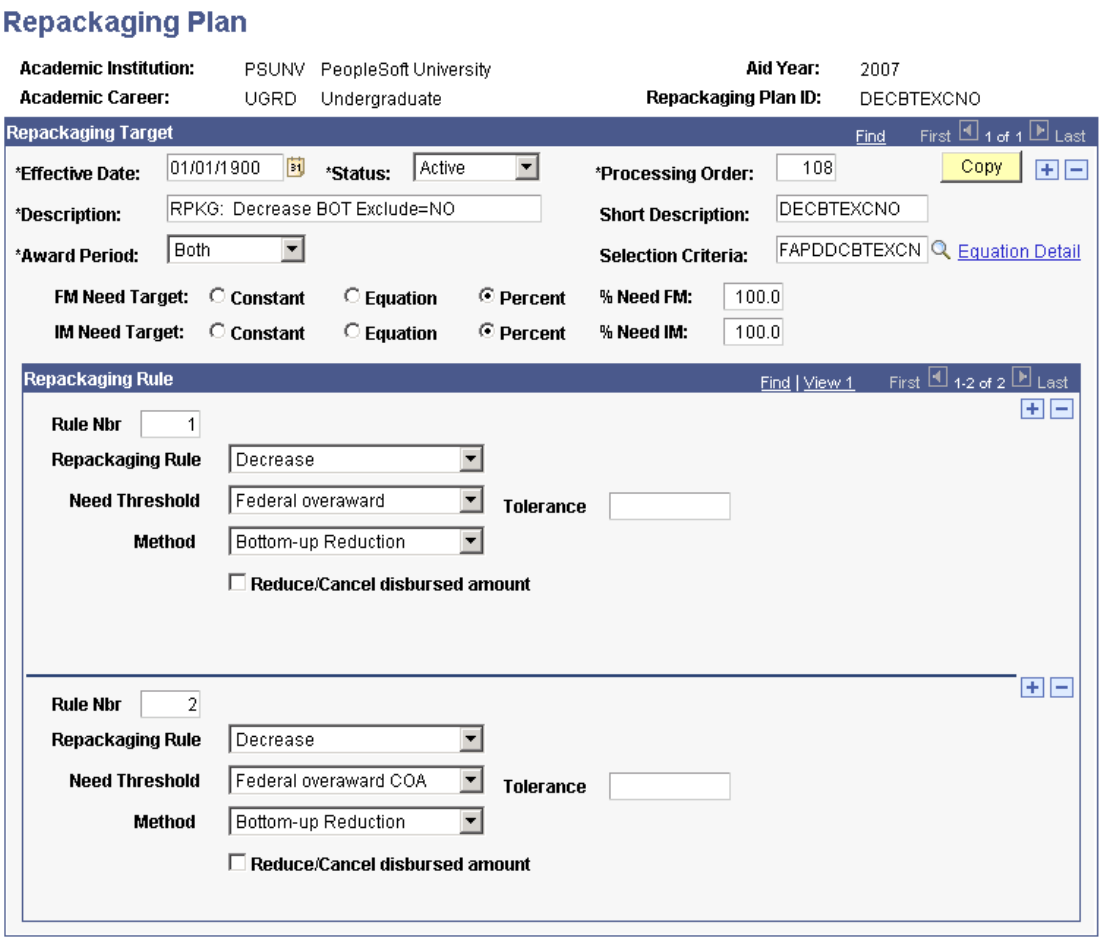
The administrator determines that the student needs to be repackaged.

Decrease-Bottom Up Repackaging Plan

The Repackaging Plan page displays the Decrease – Bottom Up plan to be applied.

This example illustrates the fields and controls on the Decrease — Bottom Up Repackaging plan.

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Step 1

The system first determines that the student is overawarded. It then locates the highest sequenced award, Exclude Grant, and evaluates it. Exclude Grant is a Straight Need/Cost award. Because it is a locked award, the system does not reduce it; it is preserved and remains unchanged. The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA.

This example illustrates the Step 1 calculation.

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			Step 1		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,440.00)	740.00	(9,000.00)
Exclude Grant	Straight Need/Cost	Y	(9,440.00)	1,000.00	(10,000.00)
(Overaward Need)/ Unmet Need				(10,000.00)	(10,000.00)
(Overaward COA)/ Unmet COA			(9,440.00)	(9,440.00)	

This the Need Summary result after the system processes the Exclude Grant.

This example illustrates the Result of step 1 calculation.

Step 1	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	22,140.00
Special Need/Cost Aid	0.00
Total Aid	22,140.00
Overaward Need	(10,000.00)
Overaward COA	(9,440.00)

The student is still overawarded.

Step 2

The next sequenced award, bottom up, is the FASS Scholarship. This is an unlocked Special Need/Cost award. Because the student is overawarded, the Special Need/Cost attribute is applied, and the system reduces the award down to match the EFC/SAI: The original award of 740 less EFC/SAI of 560 equals 180. Therefore, the system reduces the original award by 180.

Revised award = 560 (740 – 180 = 560).

After the reduction is made, the system then updates the Need Summary totals (top down). Both the COA and Need running totals are reduced based on existing awards as well as on the revised 560 USD FASS Scholarship. In this step, the FASS Scholarship completely replaces EFC/SAI.

This example illustrates the Step 2 calculation.

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			Step 2		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,260.00)	560.00	(8,820.00)
Exclude Grant	Straight Need/Cost	Y	(9,260.00)	1,000.00	(9,820.00)
(Overaward Need)/ Unmet Need				(9,820.00)	(9,820.00)
(Overaward COA)/ Unmet COA			(9,260.00)	(9,260.00)	

This the Need Summary result after the system processes the FASS Scholarship.

This example illustrates the Result of step 2 calculation.

Step 2	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	21,400.00
Special Need/Cost Aid	560.00
Total Aid	21,960.00
Overaward Need	(9,820.00)
Overaward COA	(9,260.00)

The student is still overawarded.

Step 3

The next sequenced award, bottom up, is the FASS Grant. This is a locked Straight Need/Cost award. Because it is locked, the system preserves the original amount and does not reduce it. The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA. In this step, the FASS Scholarship completely replaces EFC/SAI.

This example illustrates the Step 3 calculation.

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Item	Meet Need/Cost	Lock	Step 3 Reduce COA	Step 3 Original value	Step 3 Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,260.00)	560.00	(8,820.00)
Exclude Grant	Straight Need/Cost	Y	(9,260.00)	1,000.00	(9,820.00)
(Overaward Need)/ Unmet Need				(9,820.00)	(9,820.00)
(Overaward COA)/ Unmet COA			(9,260.00)	(9,260.00)	

This is the Need Summary result after the system processes the FASS Grant.

This example illustrates the Result of step 3 calculation.

Step 3	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	21,400.00
Special Need/Cost Aid	560.00
Total Aid	21,960.00
Overaward Need	(9,820.00)
Overaward COA	(9,260.00)

The student is still overawarded.

Step 4

The next sequenced award, bottom up, is the SEOG, an unlocked, Straight Need/Cost award. Because the student still has an Overaward Need amount of 9,820 USD, the system reduces the SEOG award down to 0.00 USD. After the reduction is made, the system updates the Need Summary totals for the student, reducing both the Need and COA totals based on the revised SEOG as well as other existing awards. In this step, the FASS Scholarship completely replaces EFC/SAI.

This example illustrates the Step 4 calculation.

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Item	Meet Need/Cost	Lock	Step 4 Reduce COA	Step 4 Original value	Step 4 Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(2,700.00)	0.00	(3,260.00)
FASS Grant	Straight Need/Cost	Y	(3,700.00)	1,000.00	(4,260.00)
FASS Scholarship	Special Need/Cost	N	(4,260.00)	560.00	(4,820.00)
Exclude Grant	Straight Need/Cost	Y	(5,260.00)	1,000.00	(5,820.00)
(Overaward Need)/ Unmet Need				(5,820.00)	(5,820.00)
(Overaward COA)/ Unmet COA			(5,260.00)	(5,260.00)	

This the Need Summary result after the system processes the SEOG.

This example illustrates the Result of step 4 calculation.

Step 4	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	17,400.00
Special Need/Cost Aid	560.00
Total Aid	17,960.00
Overaward Need	(5,820.00)
Overaward COA	(5,260.00)

The student is still overawarded.

Step 5

The next sequenced award, bottom up, is the University Grant, an unlocked, Straight Need/Cost award. Because the student's Overaward Need is 5,820 USD, the system reduces the University Grant to 0.00 USD.

The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA. After the University Grant reduction, the student is left with remaining Unmet Need and remaining Unmet COA.

The system then subtracts the 1,000 USD locked FASS Grant from the running Need Summary totals. With the handling of this award, it presents a condition in which an overaward exists for Need (–360) but not for COA (+200). Now, because the FASS Scholarship is a Special Need/Cost award, it tries to reduce Unmet Need. Because no Unmet Need exists, it then replaces EFC/SAI with 200 USD because Unmet COA is 200 USD. Note that the characteristics of the FASS Scholarship changes since the initial reduction of the FASS Scholarship took place at step 2.

This example illustrates the Step 5 calculation.

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Item	Meet Need/Cost	Lock	Step 5 Reduce COA	Step 5 Original value	Step 5 Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	1,200.00	0.00	640.00
SEOG	Straight Need/Cost	N	1,200.00	0.00	640.00
FASS Grant	Straight Need/Cost	Y	200.00	1,000.00	(360.00)
FASS Scholarship	Special Need/Cost	N	(360.00)	560.00	(720.00)
Exclude Grant	Straight Need/Cost	Y	(1,360.00)	1,000.00	(1,720.00)
(Overaward Need)/ Unmet Need				(1,720.00)	(1,720.00)
(Overaward COA)/ Unmet COA			(1,360.00)	(1,360.00)	

This is the Need Summary after the system processes the University Grant.

This example illustrates the Results of step 5 calculation.

Step 5	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	13,860.00
Special Need/Cost Aid	200.00
Total Aid	14,060.00
Overaward Need	(1,720.00)
Overaward COA	(1,360.00)

The student is still overawarded.

Step 6

The next sequenced award, bottom up, is the Honors Scholarship, an unlocked, Special Need/Cost award. The Overaward Need is 1,720 USD, but from a top down Need Summary perspective, the student has remaining Unmet Need. So the award inherits the Straight Need/Cost characteristic. To account for the Overaward Need of 1,720 USD, the system subtracts 1,720 USD from the original Honors Scholarship amount of 6,000 USD to reduce the award to 4,280 USD (original award 6,000 minus overaward 1,720 equals revised award 4,280).

After reducing the Honors Scholarship, from a Need Summary perspective (top down), the student has remaining Unmet Need of 2,360 USD. Progressing through the package and updating Need Summary, the system accounts for the 1,000 USD FASS Grant, reducing the student's Unmet Need to 1,360 USD. At this point, because the student has remaining Unmet Need and the FASS Scholarship amount of 560 USD is less than the Unmet Need amount of 1,360 USD, the Meet Need/Cost attribute of the FASS Scholarship now inherits the Straight Need/Cost characteristic. This reduces the student's Unmet Need to 800 USD.

This example illustrates the Step 6 calculation.

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Item	Meet Need/Cost	Lock	Step 6 Reduce COA	Step 6 Original value	Step 6 Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	2,920.00	4,280.00	2,360.00
University Grant	Straight Need/Cost	N	2,920.00	0.00	2,360.00
SEOG	Straight Need/Cost	N	2,920.00	0.00	2,360.00
FASS Grant	Straight Need/Cost	Y	1,920.00	1,000.00	1,360.00
FASS Scholarship	Special Need/Cost	N	1,360.00	560.00	800.00
Exclude Grant	Straight Need/Cost	Y	360.00	1,000.00	(200.00)
(Overaward Need)/ Unmet Need				(200.00)	(200.00)
(Overaward COA)/ Unmet COA			360.00	360.00	

This is the Need Summary result after the system processes the Honors Scholarship.

This example illustrates the Results of step 6 calculation.

Step 6	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	12,340.00
Special Need/Cost Aid	0.00
Total Aid	12,340.00
Overaward Need	(200.00)
Unmet COA	360.00

The student is still overawarded in Need.

Step 7

Finally, because the student still has an Overaward Need amount of 200 USD and the Honors Scholarship amount is greater than 0.00 USD, the system reevaluates the Honors Scholarship a second time and reduces it by 200 USD so that the student is no longer in an overaward situation. At this point, when the Need Summary totals are updated, the FASS Scholarship still inherits the Straight Need/Cost characteristic.

This example illustrates the Step 7 calculation.

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Item	Meet Need/Cost	Lock	Step 7 Reduce COA	Step 7 Original value	Step 7 Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	3,120.00	4,080.00	2,560.00
University Grant	Straight Need/Cost	N	3,120.00	0.00	2,560.00
SEOG	Straight Need/Cost	N	3,120.00	0.00	2,560.00
FASS Grant	Straight Need/Cost	Y	2,120.00	1,000.00	1,560.00
FASS Scholarship	Special Need/Cost	N	1,560.00	560.00	560.00
Exclude Grant	Straight Need/Cost	Y	560.00	1,000.00	1,000.00
(Overaward Need)/ Unmet Need				0.00	0.00
(Overaward COA)/ Unmet COA			560.00	560.00	

This is the Need Summary result after the system processes the Honors Scholarship a second time to eliminate the overaward.

This example illustrates the Results of step 7 calculation.

Step 7	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	12,140.00
Special Need/Cost Aid	0.00
Total Aid	12,140.00
Unmet Need	0.00
Unmet COA	560.00

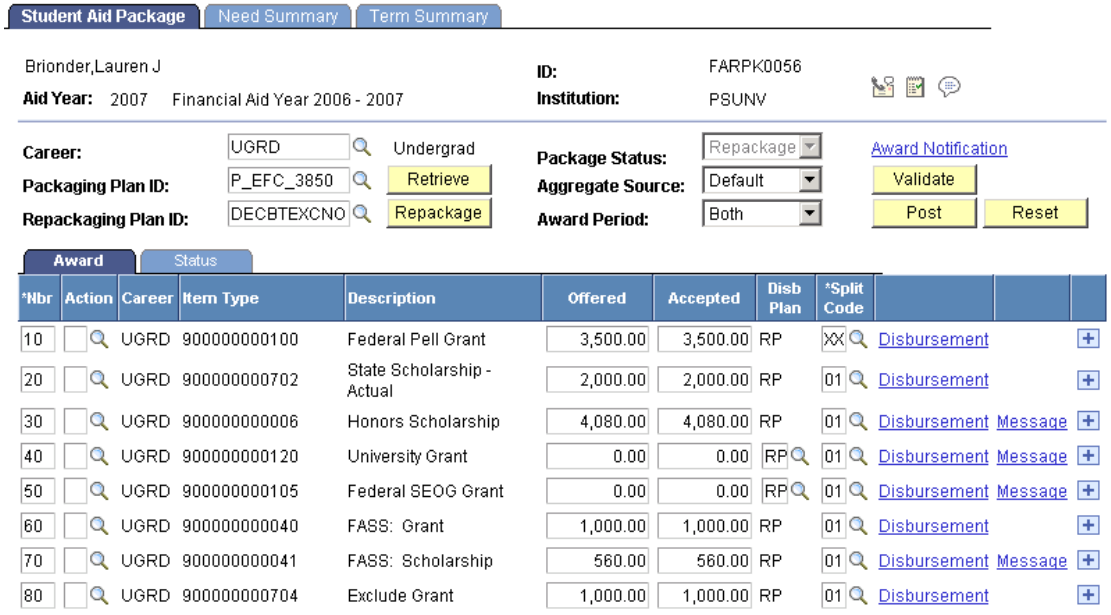
The student is no longer in an overaward situation.

Final Award Results

The Student Aid Package page displays the final set of award results.

This example illustrates the fields and controls on the Final results, Student Aid Package page.

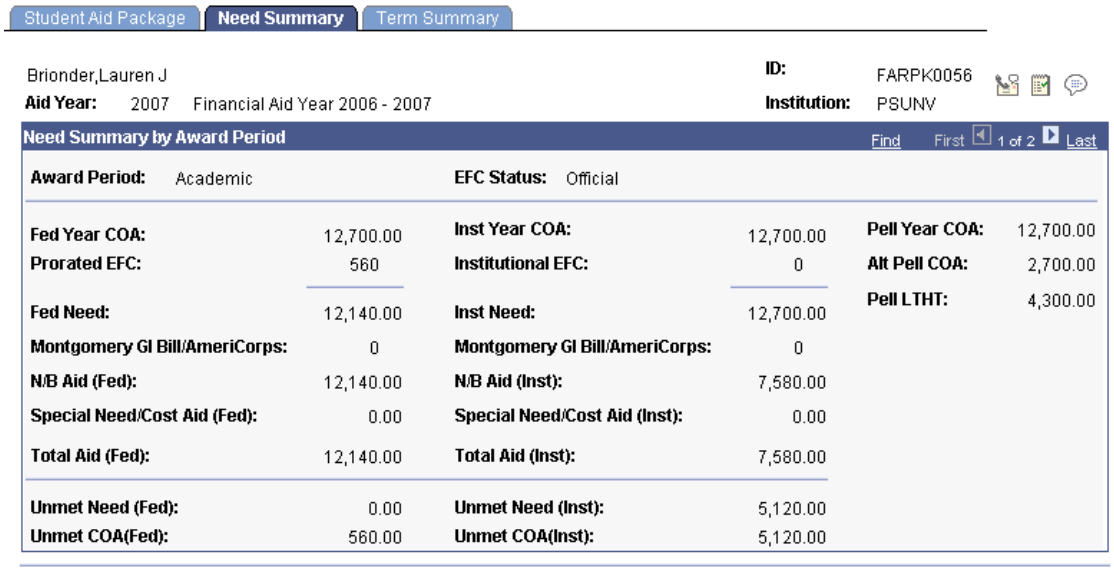
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Final Need Summary Results

The Need Summary results page displays the final need totals.

This example illustrates the fields and controls on the Final need totals, Need Summary page.



At this point, an administrator might choose to repackage the student for an increase to fill the Unmet COA using a Special Need/Cost award.

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33

Managing Special Cases in Packaging

Managing Special Cases When Packaging Students

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

- Award for additional terms.
- Award for nonstandard terms.
- Award without application data.
- Award for increased grade level eligibility.
- Add awards using the same Financial Aid Item Type.
- Re-award a cancelled or declined item type.
- Cancel awards with disbursements.
- Sequence loan awards.
- Process Direct Loan adjustments.
- Adjust CommonLine loan item types.

Understanding Awarding and Packaging Students

Financial Aid provides sophisticated tools to package students. You can manually award students one at a time, auto package students one at a time using a packaging plan, or Mass Package a large number of students using several packaging plans. Manual awarding and Auto Packaging are performed using one of the award entry components. Mass Packaging is performed using a series of background processes, but you can review the results of each step using inquiry and summary pages. After running Auto Packaging or Mass Packaging, you can supplement a student's package by manually entering awards. Using the award entry pages (Student Aid Package page, Manual Student Packaging page, and Professional Judgement page), you can also override default Financial Aid Item Types attributes, such as the disbursement plan and split code. Manual awarding is done by inserting as many Financial Aid Item Types as you want to complete a student's package or by modifying an existing award.

You must validate awards after manual award entry or after making any changes to existing awards. Validation is performed automatically as part of the Auto Packaging and Mass Packaging processes. Validation checks eligibility rules, fiscal limits, aggregate limits, and any other Financial Aid Item Type rules for each award. Validation lowers award amounts for awards that cause an over-award or which exceed fiscal or aggregate limits. When manually awarding Pell Grants, Validation assists you by calculating the Pell Grant eligibility amount for students when you leave the offer field at zero dollars.

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> **Note**
>
> Before a student can be packaged, the U.S.E.D. database matches from the Central Processing System (CPS)/FAFSA Processing System (FPS) must be passed. If one of the matches is returned with an ineligible code, it must be resolved before the student can be packaged for federal assistance. The procedure for resolving ineligible conditions is described in the documentation for the Database Matches page.

Awarding for Additional Terms

To award students for a term you must have a Financial Aid term and a budget associated with the student for the term that you want to award. If the Financial Aid term and budget do not exist for the term you are awarding, you must create a row in the Financial Aid term record and the budget record for that term. The Financial Aid term and a budget must be present for the student because the disbursement record for an award cannot be created without the associated Financial Aid term and budget. For example, if you want to award for a summer term before summer enrollment data—Financial Aid term—is available, you must manually create the summer Financial Aid term and a summer budget.

> **Note**
>
> A budget for the student is not required if you are awarding a Financial Aid Item Type that has a meet need/cost attribute of either *No Effect* or *Conditional* or if you are awarding using the Professional Judgement page.

If you are awarding for an additional term, not previously awarded for, you must use a relevant disbursement plan/split code combination to account for that new term. For example, if the student was awarded based on two terms, fall and winter, and now needs to be awarded for the spring term, you can change the split code if the disbursement plan encompasses all three terms. Otherwise, you must award for the spring term using different Financial Aid Item Types and disbursement plans and split codes that reflect a spring only disbursement.

Related Topics

- Defining Awarding and Rounding Rules
  Access the FA Item Type 2 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 2**).

Awarding for Non-Standard Terms

The system supports awarding Pell Grants for non-standard award periods (NSAP) for Pell Grant Formulas 1 and 3. You can define a Summer term as the leading or trailing term. For Formula 1, the system divides the Pell Grant award by the Pell Number of Terms across both Academic and Non-Standard terms. For Formula 3, the system sums the Academic Base Weeks and Non-Standard Base Weeks to define the Academic Program's Weeks of Instruction for Pell Grant calculations.

See Establishing Defaults.

See Reviewing Pell Information.

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See Awarding Pell Grants for the 2022-2023 and 2023-2024 Aid Years.

Awarding Without Application Data

Students who have no application data (ISIR, PROFILE, or institutional application) can be awarded. A student is considered to have no application if the student has no application data *or* if the student has an application that is different to that indicated in **Packaging Data Source** field on the Financial Aid Defaults page. For example, if you specify *Federal* for your packaging data source and the student only has a PROFILE application, the student is considered to have no application.

A student who has no application, as previously defined, is considered by Packaging to be ineligible for federal funds, except a PLUS loan. If you try to award federal funds (except a PLUS loan) to a student who has no application you get the message, *In NO APP status. Only conditional, No Effect, or PLUS Item Types are valid.* When a PLUS loan is being awarded to an undergraduate student who has no application, Packaging bypasses all federal eligibility checks, including the dependency check, and the PLUS loan is awarded.

Generally when awarding students who have no application, a budget is not required. However, students with no application who are awarded a PLUS loan must have a budget.

To award a Financial Aid Item Type to a student who has no application data—except for PLUS Financial Aid Item Types—the Financial Aid Item Type's Meet Need/Cost attribute must be defined as *Conditional, No Effect,* or *Cost Only* and the Financial Aid Item Type's Source attribute *cannot* be *Federal.* The Meet Need/Cost attribute must be *Conditional, No Effect* or *Cost Only* because no need is calculated for the student without an application. The Source attribute must not be *Federal,* except for PLUS, because when awarding a federal award, Packaging requires ISIR data.

See Defining Financial Aid Item Types.

If you are packaging a student who does not have an ISIR or institutional application data in the system, when you enter any of the award entry pages you receive a message that says, "Student does not have application data." This message is informational only; you can acknowledge the message and enter the page.

Awarding for Increased Grade Level Eligibility

Federally funded financial aid programs require strict eligibility requirements and borrowing limits. Most grade level limits increase as students progresses in their studies. A student who has already borrowed up to the annual level limit within an academic year can receive additional funds if the annual level limit increases because a student advances or progresses to a new grade level with a higher-level limit. Financial Aid provides two procedural options to accommodate and award for an additional increase due to grade level changes. Option one is to use multiple and/or unique item types with different disbursement plans or split codes to support the additional eligibility. The other option is to select the **Multi-Pass Processing** check box. The Multi-Pass processing option set at the aggregate area level provides the means to automate mid-year grade level limit increases during the Awarding and Packaging process. This is an optional setting. This option is currently disabled for loan programs processed by the financial aid Loan Origination process (for example, Direct, FFELP, Health, Alternative and Perkins loan programs).

See Setting Up Aggregate Aid.

To award funds that have aggregate level limits defined and do not have the Multi-Pass processing option selected, you must use multiple Financial Aid Item Types and different disbursement plans/split codes to support the additional term. The Financial Aid Item Types

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must be associated with the same aggregate area to calculate aggregate limits correctly. The following scenario for the Stafford loan program demonstrates how it works.

Awarding Stafford loans across multiple NSLDS loan years is necessary when a student begins the financial aid year at one NSLDS level and then advances to the next level in subsequent terms within the same aid year. For example, you may have a student who is a freshman in the fall term but has enough credits to advance to a sophomore in the spring term. To determine the NSLDS loan year, Packaging evaluates the first nonzero disbursement record dictated by the disbursement plan/split code pattern and uses the corresponding term for that record. Then Packaging checks the student's NSLDS loan year for the corresponding term where the first nonzero disbursement record appears.

The student is awarded initially based on his or her freshman status—NSLDS loan year is Freshman. The student is awarded the maximum loan amount for a freshman—sequence #10. You select a disbursement plan/split code pattern for equal disbursements. You validate and post the award. The following table shows the initial loan award:

Seq	Item Type	Aggregate Area	Award Amount	Disb Plan	Disb Split	Disb Amount	Term/ NSLDS Level
10	900000001234	Subsidized Stafford	2625 USD	01	01 = 50% 50%	1313 USD 1312 USD	Fall/ Freshman Spring/ Freshman

Near the end of the fall term the student tells you that he or she has enough credits to be a sophomore for the spring term and would like to receive additional loan money. First, you must change the NSLDS loan year on the student's Financial Aid term record for the term in which the student advances to sophomore status. After changing the NSLDS loan year, rebuild the student's spring budget. Then the additional award amount must be entered as a separate Financial Aid Item Type on the award entry page—sequence #20. To do this, you must have two Financial Aid Item Types set up for the subsidized Stafford loan and two Financial Aid Item Types set up for the unsubsidized Stafford loan. Use one for the initial award and the other for any subsequent (add-on) awards.

You award a subsequent Stafford loan, using a different Financial Aid Item Type from the initial loan award and a different disbursement plan/split code pattern to support only the spring term. Packaging determines the award amount for the add-on loan. Use a disbursement plan/split code pattern that distributes 100 percent of the additional award in the spring term. If there were more than one term remaining in the aid year, you would distribute the 100 percent evenly across the remaining terms. If you are manually packaging the student, you can leave the award amount at zero, and the Validation process calculates the difference between the freshman loan maximum already awarded and the sophomore loan maximum and awards the correct amount (the difference). After validation, the two loans are both shown because they are two separate Financial Aid Item Types. The Financial Aid Item Types must be associated with the same aggregate area to account for all sources that affect aggregate limits eligibility.

The first award is the total freshman loan amount split evenly across both terms and the second award—a different Financial Aid Item Type—represents the additional spring term only amount the student is eligible to receive as a sophomore. The following table shows the awards before and after validation:

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Seq	Item Type	Aggregate Area	Award Amount	Disb Plan	Disb Split	Disb Amount	Term/ NSLDS Level
10	900000001234	Subsidized Stafford	2625 USD	01	01 = 50% 50%	1313 USD 1312 USD	Fall/ Freshman Spring/ Freshman
20	900000005566	Subsidized Stafford	875 USD	03	01= 100%	875 USD	Spring/ Sophomore

* Using the defined Aggregate limits, Packaging determines the student's eligibility to be 3500 USD (sophomore aggregate limit) minus 2625 USD (freshman award) equals 875 USD (maximum sophomore eligible limit).

Adding Awards Using the Same Financial Aid Item Type

The system permits you to award additional awards using the same Financial Aid Item Type under the following conditions:

- NSLDS loan year must be the *same* for both awards using the same Financial Aid Item Type, only if the Financial Aid Item Type is tied to an aggregate area that does not have the Multi-Pass processing option selected.
- Career must be the *same* for both awards using the same Financial Aid Item Type.
- Disbursement plan must be the *same* for both awards using the same Financial Aid Item Type.
- Split codes can be *different* for the awards using the same Financial Aid Item Type.

Given the previous conditions, the Posting process collapses the two awards with the same Financial Aid Item Type into one award. The split codes are combined and a custom split code is returned. For example, if you have disbursement plan 01 and split code 02 for one award and disbursement plan 01 and split code 03 for the subsequent instance of that award, the combined award has disbursement plan 01 and split code XX.

When you are awarding for an add-on term, such as summer, you must follow the previous rules regarding NSLDS loan year.

If you have different careers with different NSLDS loan years, you can use the same Financial Aid Item Type because the Financial Aid Item Types for different careers are not combined.

Here is a list of the fields that are affected by the Award Merging process that occurs when the Posting process encounters two or more instances of the same Financial Aid Item Type:

Field	Value After Item Types Are Merged
Offered Amount	Sum of the offered amounts
Accepted Amount	Sum of the accepted amounts
Award Action	*B—Offered/Accepted* when sum of accepted Amounts > 0 *O—Offer* when previous condition is not met **Note:** Canceled and declined awards are no longer visible after posting.

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Field	Value After Item Types Are Merged
Split Code	*XX* when different split codes are used **Note:** The disbursement plans must be the same.
Aggregate Level	When the **Multi-Pass processing** option is selected, the system tracks aggregate level limits based on each grade level limit increase. When the **Multi-Pass processing** option is not selected, the system tracks aggregate level limits based on the NSLDS Level from the term where the first nonzero disbursement ID exists within the disbursement plan.

The following attributes are *not* affected by the Award Merging process that occurs when the Posting process encounters two or more instances of the same Financial Aid Item Type. The Posting process preserves the value of the highest sequence-numbered row for each of these attributes.

- Sequence Number
- Disbursement Plan
- Professional Judgement override
- Need Override
- Lock override
- Charge Priority List

Re-awarding a Canceled or Declined Item Type

In some instances you may want to re-award or repackage an award for a student after it has been canceled or declined.

You can use the same Financial Aid Item Type as long as authorization and disbursement amounts are set to zero. If the Financial Aid Item Type is a loan and originated, before re-awarding, you must ensure the loan record's initial award amount is $0 and all actual disbursement amounts have been processed and accepted to $0 with the COD system.

Otherwise, you must use a different Financial Aid Item Type. In addition, you can use the same or different sequence number when the conditions have been met. Using a different sequence number of a Financial Aid Item Type permits you to package the student in batch or online using the Auto Package function with the same Financial Aid Item Type after you have canceled the award.

For example, a student was awarded a non-loan Financial Aid Item Type such as a University Grant for 1,000.00 USD with a sequence number of 10 and a loan Financial Aid Item Type for 5,500.00 USD with a sequence number of 20. If the student originally declined both awards and later decided to attend spring term, you can use the same Financial Aid Item Types provided authorization, disbursement, or loan origination has not occurred. If the University Grant was disbursed for 500.00 USD for the fall term, you must set this disbursement down to zero—authorization and disbursement amounts must be backed out. You can then use the same Financial Aid Item Type and sequence number or insert a row and use a new sequence number for the same Financial Aid Item Type. If loan origination has not taken place, you can use the same Financial Aid Item Type and sequence number or insert a row. Otherwise, you must use a different Financial Aid Item Type and sequence number.

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Canceling Awards with Disbursements

Packaging does not contain any edits to prevent you from canceling awards for which you have already made disbursements for a student. After you cancel a student's award that has associated disbursed amounts, Packaging retains a record of those disbursements—including the associated disbursement plan/split code pattern. This causes a problem if you attempt to award the student a second instance of the same Financial Aid Item Type for the award period but use a different disbursement plan than the disbursement plan associated with the canceled award. Packaging cannot reconcile the disbursement plan for the canceled award that has been partially or wholly disbursed with the disbursement plan called for by the new award. This situation can occur for Financial Aid Item Types whether or not disbursement protection has been activated for that Financial Aid Item Type.

For example, you offer an original award of the honors scholarship for 1,000.00 USD to a student. All amounts in the following table are in U.S. dollars (USD):

FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb Date	Scheduled Disbs.	Actual Disbs.
Honors Scholarship	AT	09	A	1,000.00	Sep	500.00 (50%)	500.00
					Jan	500.00 (50%)	0.00

You then decide to cancel the original award, and offer the student a 900.00 USD honors scholarship with a different disbursement plan. The following table shows the retained canceled award and the new award. All amounts are in USD:

FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb Date	Scheduled Disbs.	Actual Disbs.
Honors Scholarship	AT	09	C	0.00	Sep	0.00 (0%)	500.00
Honors Scholarship	01	01	A	900.00	Sep	100.00 (11.1%)	0.00
					Oct	100.00 (11.1%)	0.00
					Nov	100.00 (11.1%)	0.00
					Dec	100.00 (11.1%)	0.00
					Jan	100.00 (11.1%)	0.00
					Feb	100.00 (11.1%)	0.00
					Mar	100.00 (11.1%)	0.00
					Apr	100.00 (11.1%)	0.00

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FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb Date	Scheduled Disbs.	Actual Disbs.
					May	100.00 (11.2%)	0.00

Packaging cannot reconcile the existing 500.00 USD disbursement from the canceled award with the new scheduled monthly disbursements of 100.00 USD.

The Validation process contains logic to prevent this situation from occurring. When you validate a student's award, the Validation process checks to see if multiple instances of the same Financial Aid Item Type with different disbursement plans exist. If this is the case, the Validation process then checks to see if the first instance is a canceled or declined award. If it is, the Validation process then checks whether the award has been disbursed, partially or wholly. If disbursements have taken place, then the Validation process cancels the second instance with reject message 9581, "You have a disbursed award that is either canceled or declined that contains a different disbursement plan than your newest offer."

The Validation process performs this check on both loans and non-loans. To award a Financial Aid Item Type under a different disbursement plan, you must first run both the authorization and disbursement processes to back out the row contained under the old disbursement plan. If you want to keep the disbursement plan, you can then award a second instance using the same disbursement plan.

Sequencing Loan Awards

When entering additional Stafford subsidized loans or additional Stafford unsubsidized loans—as in the multiple NSLDS loan years in the same aid year scenario—it is important that the subsidized loans come before the unsubsidized loans in the award sequence. Although the student has additional eligibility in the second awarding session, the Stafford logic requires that any subsidized loans be sequenced before any unsubsidized loans. An example is provided below. In the following example, the subsidized Stafford #2 and unsubsidized Stafford #2 are the second Financial Aid Item Types used to award the additional amount the student is eligible for since the student has changed NSLDS loan years:

First Awarding Session			Second Awarding Session		
Sequence of Award	*Award*	*Aggregate Area*	*Sequence of Award*	*Award*	*Aggregate Area*
10	Subsidized Stafford #1	Subsidized Stafford	10	Subsidized Stafford #1	Subsidized Stafford
20	Unsubsidized Stafford #1	Unsubsidized Stafford	15	Subsidized Stafford #2	Subsidized Stafford
			20	Unsubsidized Stafford #1	Unsubsidized Stafford
			25	Unsubsidized Stafford #2	Unsubsidized Stafford

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> **Note**
>
> Subsequent loan awards, after a change in NSLDS loan year, must be awarded using a different Financial Aid Item Type because of the change in NSLDS loan years.

Processing Direct Loan Adjustments

Award and disbursement details from the Packaging process are used in Loan Origination records to support COD processing of Direct Loans. COD can accept and process up to 20 disbursements for each award with the disbursement number indicated in the COD Disbursement Number field. Therefore, you can allocate up to 20 potential disbursements when setting up any of the Direct Loan Financial Aid Item Types: Stafford (subsidized and unsubsidized) and PLUS (parent and graduate student PLUS). The Loan Origination process updates loan origination information based on award adjustments in the context of an award's Disbursement IDs as created under the rules set by its Financial Aid Item Type and Disbursement Plan/Split Code Formula.

> **Warning**
>
> For Direct Loans, it is *strongly recommended* that you set up Direct Loan Financial Aid Item Types using a Disbursement Split Formula that has an **Even Split Option** value of *Even among first disb by Term*. Doing this ensures that the Origination records automatically inherit disbursement protection and award adjustment attributes necessary for proper COD reporting.
>
> If Direct Loan originations are created from disbursements where the **Even Split Code** option is not *Even among first disb for Term*, the Packaging process ignores any disbursements already made and repackages the student without regard to disbursement activity.

When a Direct Loan is awarded using the setup recommended above, the Packaging process splits the loan evenly among the first Disbursement ID of a term when the award is initially offered. Then, when award adjustments are made, the Packaging process updates the award disbursement details based on the assumption that the *Even among first disb by Term* option is used, whether the award has been disbursed, and what Disbursement IDs remain within each term.

If the Direct Loan has been awarded and originated, but not yet been disbursed, an increase to the award reallocates the new award amount using the existing disbursement plan split code. In this case, further loan processing recognizes the award adjustment as an origination award change to the existing scheduled disbursements.

Here is an example of how award increases can affect the distribution of awards and disbursements using the recommended setup and an initial award of 3,000.00 USD:

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3,000.00 USD (original award, no funds disbursed)						
	Fall	Winter	Spring			
Scheduled Amount (Disbursement ID)	1,000.00 USD D 01	0.00 USD D 02	1,000.00 USD D 03	0.00 USD D 04	1,000.00 USD D 05	0.00 USD D 06
Disbursed Amount	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD

Prior to disbursing any funds, the award is increased to 4,500.00 USD:

4,500.00 USD (increased from original award of 3,000.00 USD, no funds disbursed)						
	Fall	Winter	Spring			
Scheduled Amount (Disbursement ID)	1,500.00 USD D 01	0.00 USD D 02	1,500.00 USD D 03	0.00 USD D 04	1,500.00 USD D 05	0.00 USD D 06
Disbursed Amount	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD

The Fall award of 1,500.00 USD is disbursed, and afterwards, the award is increased to 6,000.00 USD. The 500.00 USD increase has not yet been disbursed:

6,000.00 USD (increased from 4,500.00 USD *after* the Fall portion of 1,500.00 USD is disbursed)						
	Fall	Winter	Spring			
Scheduled Amount (Disbursement ID)	1,500.00 USD D 01	500.00 USD D 02	2,000.00 USD D 03	0.00 USD D 04	2,000.00 USD D 05	0.00 USD D 06

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6,000.00 USD (increased from 4,500.00 USD *after* the Fall portion of 1,500.00 USD is disbursed)						
Disbursed Amount	1,500.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD

The additional 500.00 USD for Fall is now disbursed, and, afterwards, the award is increased to 7,500.00 USD. Since there are no remaining Disbursement ID's for Fall, the increase is distributed over the Winter and Spring terms.

7,500.00 USD (increased from 6,000.00 USD, no remaining Fall Disbursement ID's to use)						
	Fall	Winter	Spring			
Scheduled Amount (Disbursement ID)	1,500.00 USD D 01	500.00 USD D 02	2,750.00 USD D 03	0.00 USD D 04	2,750.00 USD D 05	0.00 USD D 06
Disbursed Amount	1,500.00 USD	500.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD

Processing Direct Loan PLUS Adjustments

When determining how to adjust a Direct Loan PLUS award, there are circumstances that may require a separate or new loan application to be created for COD processing.

For example, COD requires a new MPN to be processed if the borrower has already been established and processed a DL PLUS *based on an Endorser*. In this example, COD internally tags the loan application as a Single-Loan MPN. Once a Single-Loan MPN has been established, no other awards can be linked to that MPN. If the borrower requests a subsequent PLUS loan, a new MPN must be generated and signed. To do this, the borrower must be awarded a *new and distinct* Direct Loan Financial Aid Item Type. Each distinct Direct Loan Financial Aid Item Type results in the Loan Origination process creating a separate and distinct loan application. Here is a specific example: a student is awarded a Direct PLUS of 1,000.00USD. The Direct PLUS is established and processed with an approved Endorser. The borrower is eligible and requests an additional 900.00USD of Direct PLUS loan. You must add the increase in award using a separate and distinct Direct Loan Financial Aid Item Type. Loan Processing then creates a new loan record, supporting the requirement for a new MPN and credit check.

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Handling Error Messages in Direct Loan Adjustments and Packaging

Five error messages explain errors encountered during the Direct Loan adjustment Packaging process. The following table provides the message number, message text, and an explanation of the circumstances:

Message Number	Message Text	Explanation of Circumstances
9191	Disbursed amounts > awarded amounts; original award not changed.	The most common circumstances for this error are when you enter a manual award that has a value of less than the total award amount.
9192	Disb. amount < awarded disb. amt., but no disb. entry available for change.	This error message appears when the total disbursed to the student is less than the award amount but no disbursement IDs are available for further disbursements.
9193	At least 1 DL split award value is 0.00; Net split award amount is positive.	This error message appears when you use a custom split to redistribute the award, and then increase the award and revert to the original split code. This causes the gross split award entries to zero out. Then during validation, the gross split award amounts appear as zeros, while the net split amounts and disbursements appear as positive amounts. Because the gross split detail is missing, the Packaging process cannot logically evaluate the award. The Packaging process, therefore, rejects the award altogether and returns a zero value for the overall award amount.
9493	Award cannot be adjusted, because at least 1 set of term disbs. are fully used.	This error message appears when you attempt to repackage an award that has already used all the available disbursement IDs for one or more terms. The award amount does not change.

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Message Number	Message Text	Explanation of Circumstances
9494	Award disbursements cannot be evenly reduced; even division not possible.	As a first priority, Packaging attempts to spread a net decrease evenly across all terms. Whenever possible, the award amount is divided equally among all terms. However, this is not possible when a disbursement for an amount larger than the award amount divided by the number of terms has already been made in one term. In this case, the residual amount—award amount minus the amount already disbursed in the previously-mentioned term—is divided equally among the remaining terms.

Related Topics

- Protecting Disbursements During Awarding
  This section provides an overview of disbursement protection and provides examples of:

Adjusting CommonLine Loan Item Types

CommonLine loans are highly dependent on the Packaging process. During the process of originating, transmitting, and receiving loan information from the loan servicer, changes to the loan award can affect the loan process. Conversely, changes to loan information by the lender can affect the loan award information in the student's package. After a CommonLine item type is awarded and accepted, it is ready for immediate processing by the loan program. The loan is originated and transmitted electronically to the loan servicer. After approval by the servicer, you can update the award in the student's package if the disbursement amounts and fees need to be corrected with the amounts confirmed by the lender. The system performs this automatically by the CommonLine and CRC loan inbound processes. After the loan is guaranteed, adjustments to the loan item type amounts trigger an adjustment to the loan by the loan origination process, and this information is transmitted to the loan servicer.

A problem exists when you change the loan item type while the loan is in transit to the servicer and a response has not yet been received by the school. If this occurs, the notification of the loan guarantee fails to load by the loan inbound processes if the amount of the item type no longer matches the amount of the loan. To resolve the issue, users must determine the proper corrective action. This often requires readjustment of the loan award so that the loan inbound processes can complete their task, and then readjusting again the loan award to the student's true eligibility.

To prevent this problem, Packaging no longer allows loan awards to be adjusted if an originated loan exists for the item type with a loan origination transmission status of *Transmitted.* Awards can be modified after the loan has been processed by the loan servicer and the approval (or rejection) of the loan has been loaded into the system. In cases where a school must modify the award amount, you can change the transmission status of the loan using the Override Loan Status component. You should perform this action after careful consideration, as additional actions may be required to ensure that the loan is correctly processed to completion.

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Related Topics

- Receiving and Processing CL4 Inbound Files
  This section discusses how to:
- Originating CommonLine Loans
  This section provides an overview and discusses how to originate CommonLine loans.

Awarding for Multiple Careers

This section provides an overview of awarding for multiple careers and discusses how to:

- Use award entry pages for multiple careers.
- Package sequential careers.
- Package replacement careers.
- Make award adjustments with multiple careers.
- Use Auto Packaging with multiple careers.
- Use Mass Packaging with multiple careers.

Understanding Awarding for Multiple Careers

Financial Aid enables you to package a student for one career for the first term and another career for one or more subsequent terms. You can also package a student for one career for the aid year, then later repackage the student with a different career for part of the aid year. This is called "sequential career awarding."

You can also package a student for one career for the aid year and then replace the award package with awards for a second career for the aid year. The change in career would occur because the student changed to a different career for the aid year, prior to the start of the first term. This is called "replacement career awarding."

For institutions with more than two terms, the system also allows you to award a student who changes from Career 1 for the aid year to Career 1 for Term 1 and Career 2 for Term 2 then back to Career 1 for Term 3. The system also supports awarding for students who change from Career 1 for the aid year to Career 1 for Term 1 and Career 2 for Term 2 and Career 3 for Term 3. This would be sequential career awarding with three careers instead of two.

> **Note**
>
> You cannot package a student for more than one career per term.

The Student's Field Audits page displays changes made to the student's Financial Aid term during the build process. This assists you in identifying students who may need award adjustments or budget updates based on a career change or other student record change.

Mass Packaging can also process students who have different careers in different terms within the aid year. Mass Packaging packages the student using one career, then packages them again using the other career. Awards made under the first career are considered existing (passive) awards when the student is packaged for the second career.

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Using Award Entry Pages for Multiple Careers

> **Note**
>
> The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.

The **Career** field on the award entry pages enables you to select the active career to be used for the current awarding session. If the student only has one career, then that career defaults into the **Career** field. You can make new awards or alter existing awards for the active career only. After you validate and post awards, or click the **Reset** button, you can select a different active career.

The non-active career and the awards associated with it are called a passive career and passive awards. Passive awards are listed first sequentially on the award entry page and active awards are listed below them. Passive awards and careers cannot be updated during the awarding session and are considered existing awards and careers. You cannot re-sequence active awards to intersperse them among passive awards.

The system considers passive awards first when it validates the awards, and passive awards are not changed by the system. Packaging includes awards for the passive career in the need summary amounts. Packaging also uses budget data for the passive career to calculate need summary amounts.

After you select a career and move out of the **Career** field, the **Need Override** check box is automatically selected for any existing awards—posted awards from an earlier awarding session—for the active career. You can choose to clear the **Need Override** check box on the existing awards for the active career.

> **Note**
>
> The **Need Override** check box does not override aggregate area maximums. So, if a student has multiple NSLDS loan years from their multiple careers—such as undergraduate senior and first-year graduate—and there are awards from the same aggregate area for both careers, the aggregate area maximums for the active career's NSLDS loan year are adhered to during validation.

Here is an example of how the **Need Override** check box functions with multiple NSLDS loan years and aggregate area limits. You award a 5,500.00 USD subsidized Stafford loan for the undergraduate career—senior NSLDS loan year—and validate and post the award. The aggregate total for the Stafford is 5,500.00 USD, which is the maximum allowed for a senior NSLDS loan year. Next, you award a 3,000.00 USD subsidized Stafford loan for the graduate career—first-year graduate NSLDS loan year—and validate and post that award. The aggregate total for the subsidized Stafford for the first-year graduate is 8,500.00 USD, which is the maximum allowed for a first year graduate NSLDS loan year. Now, you select the undergraduate career as the active career to add more awards. (The **Need Override** check box is automatically selected for the 5,500.00 USD subsidized Stafford award when you move out of the **Career** field because it is a previously posted award.) You add additional awards for the undergraduate career. When you validate and post the awards, the undergraduate career is active, the 5,500.00 USD subsidized Stafford award is reduced to 2,500.00 USD to stay within the aggregate maximum for a senior NSLDS loan year. The 3,000.00 USD subsidized

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Stafford made under the graduate career is added to the 2,500.00 USD from the undergraduate career making a total of 5,500.00 USD. This is the maximum allowed for a senior NSLDS loan year.

The following table gives an example of how you would use the **Need Override** check box in general. This is the award package the first time the student is packaged:

Career	Award	Amount	Term	Disb Plan	Split Code
Undergraduate	Pell Grant*	1,000.00 USD 1,000.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 Terms
Undergraduate	University Grant (no aggregate area associated)	2,000.00 USD 2,000.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Undergraduate	Institutional Loan (no aggregate area associated)	750.00 USD 750.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

This is the award package when you have reduced the Pell Grant so that it is awarded only for Term 1 (the student is a graduate student in Term 2) and you have selected the **Need Override** check box for the University Grant and Institutional Loan awards. Even though more need exists due to the reduced Pell Grant—the University Grant and Institutional Loan are not increased because the **Need Override** check box is selected.

Career	Award	Need Override	Amount	Term	Disb Plan	Split Code
Undergraduate	Pell Grant*		1,000 USD	1	01 – Term 1 and Term 2	02 – 100% in Term 1
Undergraduate/ Graduate	University Grant	Check box selected	2,000 USD 2,000 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Undergraduate/ Graduate	Institutional Loan	Check box selected	750 USD 750 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

Packaging Sequential Careers

> **Note**
>
> The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.

If a student is initially packaged for one career for the entire aid year and then changes to another career in a second or third term in the aid year, you can adjust the student's award by

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taking the steps outlined in this section. This situation generally occurs when a student changes careers part way through the aid year, and is called sequential career packaging.

The following step-by-step process should be used after the first term has begun and the student has been packaged for the entire aid year using one career. Then the Financial Aid Term Build process changes the student's career or the student informs the financial aid office that he or she has a different career for the second term.

To package sequential careers for a student:

1. Assume the student is in Career 1 for Term 1 and Term 2.
2. After Term 1 begins, the student changes to Career 2 for Term 2.
3. The Financial Aid Term build changes the student's career information, or you can change the career online.

   Adjust the budget for Career 1 in Term 2 down to zero and build a new budget for Career 2 in Term 2.

   > **Note**
   >
   > Reducing a budget to zero does not remove the budget record. When the career on Financial Aid term changes, the actual Financial Aid term record still exists. The records used in the initial awarding have the data changed, but they are not deleted.

4. Go to an award entry page.

   The student's current awards—for Career 1 in Terms 1 and 2—are displayed.
5. Select Career 1 from the available **Career** options. All the awards for Career 1 are now available to be edited.
6. Reduce the awards for Career 1 based on the number of terms the student is actually in Career 1 for the aid year.

   For example, if the student is Career 1 for Term 1 and Career 2 for Term 2, at a semester-based institution, reduce the student's Career 1 specific awards by one half. Departmental awards are an example of career-specific awards. If an award is not affected by a change in career, you do not need to adjust the award. For example, you may not need to adjust Perkins loans, Stafford loans, or University Grants. When you reduce an award, use a custom split to direct 100 percent of the award to Term 1 for Career 1 or specify a split code that distributes 100 percent of the award in Term 1 for Career 1. Validate and post your changes.

   > **Note**
   >
   > If you do not reduce the awards for the first career before packaging with the second career, the student may not have any need with which to receive additional awards, and no awards are made for the second career. The student can also be over-awarded if the need for the second career is less than the need for the first career because the second career's budget is reduced.

7. Select Career 2 from the available **Career** options on the award entry page. The remaining awards for Career 1 in Term 1 are now considered passive awards and are displayed at the top of the sequence order. Award the student for Career 2 for Term 2. Be sure to use disbursement splits that direct the Career 2 awards to Term 2 for disbursement. You can

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award the student for Career 2 using Manual Packaging, Auto Packaging, or Mass Packaging. Disbursement plans and split codes are attached to careers and only the disbursement plans and split codes for the selected career are available when awarding.

> **Note**
>
> Use the Professional Judgement page to go back and make changes to awards for Career 1 after you have awarded for Career 2 if the awards you are changing have aggregate areas associated with them. For more information regarding this topic see the "Making Award Adjustments with Multiple Careers" section.

The following tables show an example of the first award package for Career 1, then the second award package for Career 2. In the example the student begins as an undergraduate for Terms 1 and 2, then changes to a graduate for Term 2. The following table shows the student's original package:

Career	Award	Amount	Term	Disb Plan	Split Code
Undergraduate	Pell Grant*	1,000.00 USD 1,000.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Undergraduate	Subsidized Stafford Loan	2,750.00 USD 2,750.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

The following table shows the student's package with an additional subsidized Stafford loan because of the student's increased eligibility as a graduate student:

Career	Award	Amount	Term	Disb Plan	Split Code
Undergraduate	Pell Grant* (reduced)	1,000.00 USD 0.00 USD	1 2	01 – Term 1 and Term 2	Custom split with 100% in Term 1 OR 02 – 100% in Term 1
Undergraduate	Subsidized Stafford Loan	2,750.00 USD 2,750.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Graduate	Subsidized Stafford Loan#	3,000.00 USD	2	02 – Term 2 only	02 – Term 2 only

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

#Additional loan for graduate eligibility. You can use the same Financial Aid Item Type because it is a new career.

You can also use this step-by-step process for students who change from Career 1 for the aid year to Career 1 for Term 1 then Career 2 for Term 2 and back to Career 1 for Term 3. You would go through the step-by-step process first for the change to Career 2 then again for the change to Career 3.

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Packaging Replacement Careers

If a student is packaged for one career for the aid year and then changes careers for the entire aid year, you can replace the awards of one career for awards of another career. To do this, cancel all of the awards for the first career. Then award new awards for the second career, even though you may be awarding the same award(s) for the second career as you awarded for the first career.

You must build a Financial Aid term and budget for the new career before you can award for the new career.

Here are the steps for packaging students when they change from one career to another career for the entire aid year. In other words, the first career is replaced with a second career.

To package a replacement career for a student:

1. Assume the student is in Career 1 for Term 1 and Term 2, and that before Term 1 begins the student changes to Career 2 for Term 1 and Term 2.

   The Financial Aid Term build changes the student's career information, or you can change the career online.
2. Reduce the Budget for Career 1 for Terms 1 and 2 down to zero and build a new Budget for Career 2 for Terms 1 and 2.
3. Go to an award entry page.

   You see the awards for Career 1.
4. Select Career 1 in the **Career** field.

   The Career 1 awards are now available to be edited.
5. Cancel all awards for Career 1.
6. Validate and post the canceled awards.

   This discards all the awards for Career 1.
7. Select Career 2 in the **Career** field.
8. Enter all the awards for Career 2, even those that were canceled for Career 1.
9. Validate and post the awards you have entered for Career 2.

Making Award Adjustments with Multiple Careers

Sequential career packaging, one form of multi-career packaging, enables you to package a student for a first term in one career and subsequent term(s) in a second career. An example of when you use sequential career packaging is a student at a semester school who is a graduating fourth-year undergraduate in the fall semester and a first-year graduate student in the spring semester.

When you package this student, Packaging acknowledges the student's change in career by evaluating the student's NSLDS loan year, as indicated by the disbursement plan associated with the Financial Aid Item Type. If the Financial Aid Item Type has an aggregate area associated with it, Packaging uses the student's NSLDS loan year from the appropriate disbursement plan to associate the Financial Aid Item Type with the appropriate aggregate level on the aggregate area table to determine the correct aggregate limit for the student. Financial Aid Item Types such as subsidized and unsubsidized Stafford Loans point to the same aggregate area for both undergraduate and graduate careers.

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Normally, you package this student by packaging him or her as a fourth-year undergraduate for either the fall semester only or for the entire year prior to the start of the award year. Then, when the award year begins, you repackage the student as a first-year graduate for the spring semester. The student's award package includes the following Financial Aid Item Types:

Fall Semester as Undergraduate			**Spring Semester as Graduate**		
Sequence	*Description*	*Amount (USD)*	*Sequence*	*Description*	*Amount (USD)*
10	Federal SEOG Grant	2,000.00	60	University Grant	1,000.00
20	University Grant	1,950.00	70	Federal Work-Study	1,800.00
30	Federal Work-Study	1,800.00	80	Perkins Loan – ELO	3,000.00
40	Perkins Loan	2,500.00	90	Sub DL Stafford	3,000.00
50	Sub DL Stafford	5,500.00	100	Unsub DL Stafford	10,000.00

Packaging has used the NSLDS loan year values from the disbursement plans to identify the aggregate limits for his or her subsidized and unsubsidized Stafford Loans correctly. In the fall semester, the student receives a subsidized Stafford for 5,500.00 USD, the aggregate limit for fourth-year undergraduates in the subsidized Stafford aggregate area. The student does not receive an unsubsidized Stafford because he or she has already reached the aggregate limit for fourth-year undergraduates in the unsubsidized Stafford aggregate area. In the spring semester, the student receives an additional 3,000.00 USD subsidized Stafford loan, because the aggregate limit for first-year graduates is 8,500.00 USD, and the student has only received 5,500.00 USD in this aid year—as an undergraduate. The student also receives an unsubsidized Stafford loan for 10,000.00 USD because the aggregate limit for graduate students is higher than that for undergraduate students.

A problem can occur when you adjust the student's fall term after you have packaged the student as a graduate for the spring semester. When you adjust any undergraduate award, Packaging reevaluates the aggregate limit for any award that is associated with an aggregate area. If a graduate award exists within the same aid year associated with the same aggregate area as an undergraduate award, Packaging considers both the undergraduate and graduate amounts towards the undergraduate aggregate limit. Consequently, Packaging decreases the undergraduate award by the graduate award amount so that the undergraduate aggregate limit is not exceeded. For this student, if you adjust one of the fall semester awards (setting the student's University Grant to 1,450.00 USD) the student's subsidized Stafford loan decreases to 2,500.00 USD (undergraduate limit of 5,500.00 USD minus the graduate award of 3,000.00 USD).

Fall Semester as Undergraduate			**Spring Semester as Graduate**		
Sequence	*Description*	*Amount (USD)*	*Sequence*	*Description*	*Amount (USD)*
10	Federal SEOG Grant	2,000.00	60	University Grant	1,000.00
20	University Grant	1,450.00	70	Federal Work-Study	1,800.00
30	Federal Work-Study	1,800.00	80	Perkins Loan – ELO	3,000.00
40	Perkins Loan	2,500.00	90	Sub DL Stafford	3,000.00

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Fall Semester as Undergraduate			Spring Semester as Graduate		
50	Sub DL Stafford	2,500.00	100	Unsub DL Stafford	10,000.00

Packaging sets the subsidized Stafford to 2,500.00 USD while repackaging the student's fall semester awards because the student's spring semester award is associated with the same aggregate area as his or her fall Stafford award. Based on the spring semester subsidized Stafford award, Packaging determines that the student has exceeded his or her fourth-year undergraduate aggregate limit of 5,500.00 USD for subsidized Stafford loans. Therefore, Packaging decreases the student's fall subsidized Stafford loan award to 2,500.00 USD, so that the student is under the aggregate limit of 5,500.00 USD.

Packaging alerts you to a student whose award would be decreased in this situation. Packaging checks for the existence of two nonzero amounts for differing aggregate levels in an aggregate area within the same aid year for a student. If a student meets this criteria, an error message stating, "Student has an award with multiple aggregate levels; unable to package. Awards having multiple aggregate levels MUST be repackaged via Professional Judgement. DO NOT POST the set of awards generated in this Packaging Session, or it resets the loan to 0.00 USD and cancels all subsequent loan transactions. Repackage all awards via the Award Override page" appears. You may also see a shorter version of this error message: "Student has an award with multiple aggregate levels; unable to package."

Note

The error messages appear only for actions of *A—Accept, B—Accept/Offer,* and *O—Offer.* You can cancel or decline an award with multiple aggregate levels using any Packaging process.

If you receive either of the previously listed error messages, you must cancel out of the award entry page without posting the current transaction and repackage the student using the Professional Judgement page.

Warning

If you post the current transaction before exiting the award entry page, the student's award is reset to zero and the Loan Adjustment process begins.

Using Auto Packaging with Multiple Careers

When you are using Auto Packaging, only the packaging plans for the active career are available. Remember also, that the Packaging process evaluates any passive awards first before it auto packages awards for the active career.

Using Mass Packaging with Multiple Careers

Mass Packaging can also accommodate students with multiple careers. If a student with multiple careers—one career for the first term and another career for subsequent terms—is selected for Mass Packaging, the student is associated with multiple packaging plans based on their multiple careers and the selection criteria (packaging equations) associated with that

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career's packaging plan. Mass Packaging processes the student for the first career based on the processing order of the packaging plan, then awards for the second career based on the processing order of the packaging plan. The processing order for the packaging plans determines which packaging plan is used and, therefore, which career is packaged first. Awards made using a Career 1 packaging plan are passed on as passive awards to be included as part of any subsequent awarding for Career 2.

> **Note**
>
> Review the processing order for all your packaging plans to ensure that Mass Packaging selects the packaging plans, and, therefore, the careers, in the order you want. You enter the processing order on the Packaging Plan page, in the **Processing Order** field.

If you have students who have multiple careers (Career 1 and Career 2) and some students should be packaged for Career 1 first while others should be packaged for Career 2 first, you would need to run these two groups of students in separate Mass Packaging runs, changing the processing order on your packaging plans for each run. The packaging plan's processing order determines the order in which a career is packaged because the packaging plans are tied to careers.

You *cannot* allow students with posted awards in multiple careers to enter a Mass Packaging run to be selected for packaging plans for multiple careers. In live mode, Mass Packaging aborts without any messages if this is allowed. In simulation mode, your packaging results do not appear correct because the previous career's awards are not posted in simulation mode and, therefore, are not considered as existing awards when the second career is packaged. A student can have posted awards in multiple careers and go through Mass Packaging using *one* packaging plan for one career at a time.

Posted awards for multiple careers means the student has been awarded at least one award for Career 1 and at least one award for Career 2 and those awards are posted before the student is processed by Mass Packaging. To package students with posted awards in multiple careers using Mass Packaging, you should keep track of these students and only process them in Mass Packaging for one career at a time. The way to process students for one career at a time is to select the students, then make all but one of their careers invalid on the Mass Packaging by Students page or Institutional Mass Packaging by Student page. Assign packaging plans to the students. Then run Mass Packaging in simulation mode and review the results. If the results are correct, run Mass Packaging in live mode. This causes the awards to be posted for the first career. Now repeat the process for a second career.

Awards for the first career must posted to be considered as existing awards for any subsequent career's packaging. When you run Mass Packaging in simulation mode with more than one career, when the second career is being packaged, the simulated awards packaged for the first career are not considered existing awards because they are not yet posted.

Understanding Multiple Award Period Processing

Multiple award period processing functionality enables you to process students for a subsequent award period without Packaging canceling awards for the initial award period or determining incorrect award amounts. It also enables you to use the same Financial Aid Item Type for the AAP and the NSAP. The ability to process awards in passive/active mode between award periods and the disbursement protection feature make this possible. An exception to this rule is subsequent awards—with aggregate area level limit rules—made to students because their NSLDS loan year has changed during the award year. You also cannot use the same

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Financial Aid Item Type for the AAP and NSAP for non-Direct Lending loans. In these cases, you must still use separate Financial Aid Item Types for each award period.

For example, you initially package a student for an award period, the AAP, and then at a later date you process the student for a subsequent award period, the NSAP. Normally, when you package the student for the NSAP, you do not want the awards for the AAP to change. Because Packaging employs passive/active mode processing, you can process the awards in the AAP as passive awards when awarding the NSAP. Packaging does not change passive awards; it preserves them, unlike active awards that are subject to change. However, Packaging still uses the award amounts of passive awards to determine remaining annual aggregate limits or other eligibility requirements and to update need summary balances.

Related Topics

- Protecting Disbursements During Awarding
  This section provides an overview of disbursement protection and provides examples of:

Processing Awards for Multiple Award Periods Employing Passive/Active Mode

This section provides an overview of passive/active mode in multiple award period processing and discusses how to:

- Process sequential award periods.
- Process simultaneous award periods.

Understanding Passive/Active Mode in Multiple Award Period Processing

Packaging is able to treat awards made during an initial award period as passive awards when you are processing a subsequent award period for a student. Two factors determine whether an award is processed in active or passive mode. First is the award period attribute associated with the packaging plan you are currently using to package the student. If the award period attribute is *B − Both,* Packaging considers all awards made in either award period as active awards (active for evaluation or reevaluation). As a result, in the "Both" award period model, if you want to prevent any existing awards that you have disbursed from being reduced, you must employ disbursement protection (with the exception of Direct Loan awards, because the system's Direct Loan processing rules function like disbursement protection). If the award period attribute associated with the packaging plan is *A − Academic* or *N − Non-Standard,* and existing awards made in a previous award period contain a disbursement plan/split code pattern that does not equal the packaging plan's award period, then those awards are considered as passive awards by Packaging. Conversely, if existing awards made in a previous award period contain a disbursement plan/split code pattern that either agree with the designated award period of the packaging plan or span both award periods, then those awards are considered to be active awards, and, therefore, are reevaluated by Packaging. Only the disbursements in the active award period portion of the award are reevaluated. Reevaluation may cause the existing awards to be reduced based on the revised need situation as well as revised eligibility criteria. An award cannot be reduced below the total of the disbursements in the passive award period portion of the award.

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> **Note**
>
> Because the packaging plan's Award Period attribute triggers the use of passive/active mode, you must use an additional field to use passive/active mode processing in Manual Packaging.

> **Warning**
>
> You must not activate disbursement protection for Direct Loan Financial Aid Item Types. If you activate disbursement protection for a Direct Loan, Packaging does not follow the processing rules established for Direct Loans and instead treats the Direct Loan award as it would any other disbursement-protected award.

The award period for an individual award is determined based on the disbursement plan/split code pattern of the award. If the disbursement plan/split code pattern spans only the AAP then the award is designated as "Academic." If the disbursement plan/split code pattern spans only the NSAP, then the award is designated as "Non-Standard." Finally, if the disbursement plan/split code pattern spans both the AAP and NSAP, then the award is designated as "Both." For all awards of a Financial Aid Item Type that you use in more than one award period, the disbursement plan must span both the AAP and NSAP. In other words, all AAP and NSAP terms must be defined. The split code can have scheduled disbursements in the AAP, the NSAP, or both award periods. For awards with a disbursement plan that includes both award periods, the split code determines the award period for that award. So if the split code indicates that all disbursements are scheduled for the AAP, the award is considered to have an award period of Academic even though the disbursement plan includes the AAP and NSAP.

> **Note**
>
> If you have more than one disbursement plan for a Financial Aid Item Type—because you assigned different disbursement plans to each instance of that Financial Aid Item Type—Packaging displays an error message indicating that different disbursement plans were found.

Awards within a packaging plan must contain disbursement plan/split code patterns that are compatible with the packaging plan's award period attribute. For example, an award can have a disbursement plan/split code pattern that is designated only for the AAP despite the award period attribute on the packaging plan designating an award period of *B − Both.* However, if the award's disbursement plan/split code pattern is designated for the AAP only, and the packaging plan's award period attribute is *N − Non-Standard,* then you receive error message 9580 after validation indicating that you must change either the award's disbursement plan/split code pattern or the packaging plan's award period attribute so that they are compatible.

If the disbursement plan/split code pattern of an award does not match the award period attribute of the packaging plan, Packaging treats that award as a passive award. For example, you are packaging a student for a trailing summer term using a packaging plan with an award period attribute of *N − Non-Standard,* and the student already has an existing departmental scholarship whose disbursement plan/split code pattern designates the award for the AAP. When you repackage the student for the NSAP, Packaging treats the departmental scholarship as a passive award because the packaging plan's award period attribute and the disbursement plan/split code pattern for the existing award do not match. If the existing award has a

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disbursement plan/split code pattern that spans both award periods, Packaging evaluates only the disbursements of the award in the award period that matches the packaging plan's award period attribute as active; the disbursements designated in the other award period are processed as passive and remain untouched.

There are two different business processes involving multiple award period processing. One involves sequential award period processing, the other simultaneous award period processing. Sequential award period processing involves packaging the student for an initial award period (AAP) and then packaging the student for a second, subsequent award period (NSAP). Simultaneous award period processing involves packaging the student for both award periods at the same time. An example of sequential award period processing is when a student enrolls at a community college for only one term—summer only or spring only—in one award period and then decides to return in a subsequent term resulting in a different award period. You use simultaneous award period processing for students that attend the institution for both award periods. If you have an academic program longer than 9 months, you might be packaging your students using simultaneous award period processing. However, setting up one award period that covers the entire academic program is the recommended business process.

Processing Sequential Award Periods

During sequential award period processing, make sure that the packaging plan's award period attribute is either *A − Academic* or *N − Non-Standard,* and not *B − Both.* This allows Packaging to employ passive/active mode, and directs Packaging to use the COA, EFC/SAI, and need for the designated award period.

As an example of sequential award period processing, you are processing a student's University Grant award of 150.00 USD for the summer term. Your semester-based institution treats the summer term as a leading summer. The following table gives the student's COA, EFC/SAI, and need for both the NSAP and AAP—all values are in U.S. dollars (USD):

Need Analysis Element	Non-Standard Award Period	Academic Award Period
Cost of Attendance	3,200.00	25,000.00
Expected Family Contribution	3,000.00	11,000.00
Need	200.00	14,000.00

You first need to assign a disbursement plan that spans both the NSAP—for the leading summer term—and the AAP because the student may subsequently be eligible to receive additional University Grant funding in the AAP. In this case, you can use the same Financial Aid Item Type in both the NSAP and AAP. However, in this first pass, the disbursement split code assigned to the award should have all disbursements scheduled only in the NSAP (leading summer term).

The following table illustrates how you set up the University Grant award for the student where the disbursement plan that covers both award periods has an ID of 10 and the split code that disburses 100 percent of the award in the leading summer term has an ID of 02:

Seq No	FA Item Type	Disb Plan	Split Code	Disbursements − NSAP (in USD)	Disbursements − AAP (in USD)
10	University Grant	10	02	150.00 (100%)	0 (0% fall, 0% spring)

When Packaging processes the student for this University Grant, it takes into account the COA, EFC/SAI, and need for only the designated NSAP. Remember, the disbursement plan/

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split code pattern coupled with the packaging plan's award period attribute determines the designated award period. Although the disbursement plan spans both award periods, the split code dictates that the award period should be nonstandard. Therefore, Packaging uses the student's COA, EFC/SAI, and need information only for the NSAP when packaging the student.

The student then decides to attend your institution in the fall semester. He or she is eligible for a 1,200.00 USD University Grant during the AAP. You create a second packaging plan with an award period attribute of *Academic* that contains a packaging rule containing the University Grant Financial Aid Item Type. You assign the same disbursement plan as the summer-only University Grant. However, you must use a split code that distributes the award only in the AAP. For this example, split code ID 01, which distributes the award in two disbursements—50 percent in the fall semester and 50 percent in the spring semester—is used.

The following table illustrates the two University Grant awards for the student:

Seq No	FA Item Type	Disb Plan	Split Code	Disbursements – NSAP (in USD)	Disbursements – AAP (in USD)
10	University Grant	10	02	150.00 (100%)	0 (0% fall, 0% spring)
15	University Grant	10	01	0 (0%)	600.00 (fall), 600.00 (spring) (50% fall, 50% spring)

When Packaging runs for the second University Grant under the AAP designated packaging plan, it takes into account only the COA, EFC/SAI, and need for that designated award period. Because the University Grant award contains disbursements targeted only to the AAP—based on its disbursement plan/split code pattern—Packaging uses information only for the AAP when packaging the student. Because the first University Grant award only affects need for the NSAP, Packaging does not consider the first award of 150.00 USD during calculations for the AAP. Remember that this example is based on using a leading summer. If your institution uses a trailing summer, you would define the disbursement plan/split code pattern accordingly.

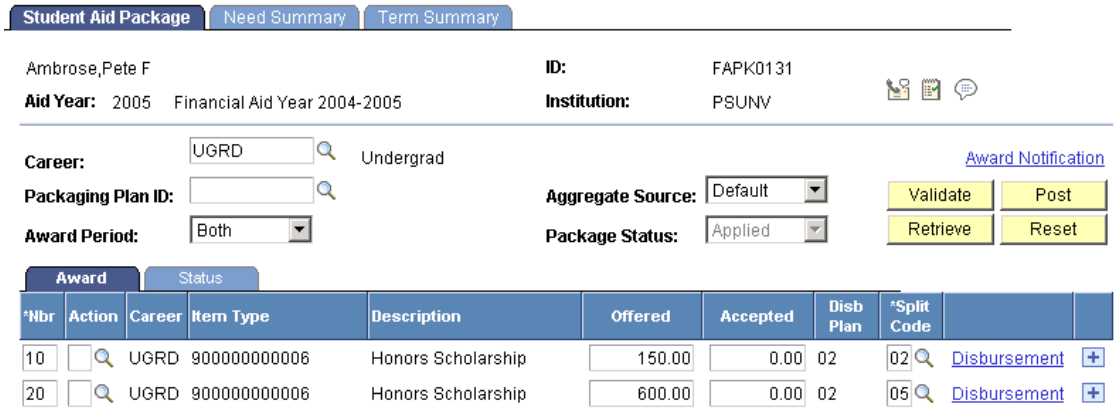
The Award Posting process merges the two instances of the University Grant into a single award because they are generated from the same Financial Aid Item Type and share the same disbursement plan. However, the Award Posting process merges the two discrete splits into one custom split, and displays *XX* in the **Split** field to indicate the custom split. The Award Posting process retains the separate disbursements called for by the two University Grant awards, and the Need Summary page reflects these separate disbursements.

The following screen shots illustrate how the Award Posting process handles the two instances of the University Grant. In the first shot, both instances of the Financial Aid Item Type are visible.

The navigation path to the page is **Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student.**

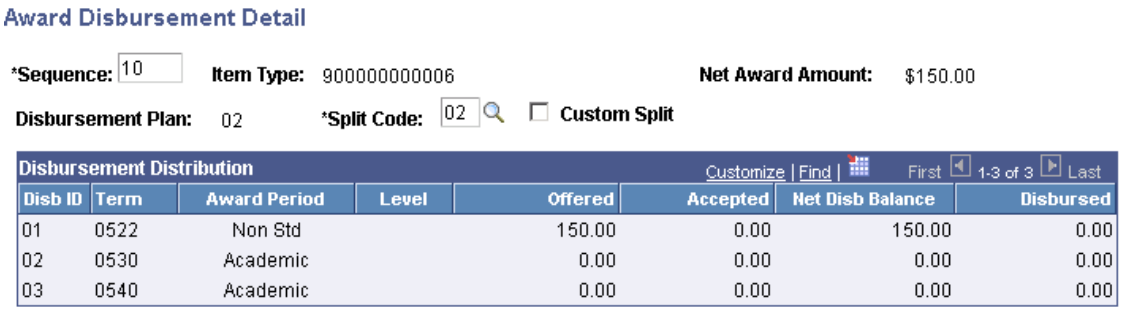
This example illustrates the Student Aid Package page with two instances of Honors Scholarship.

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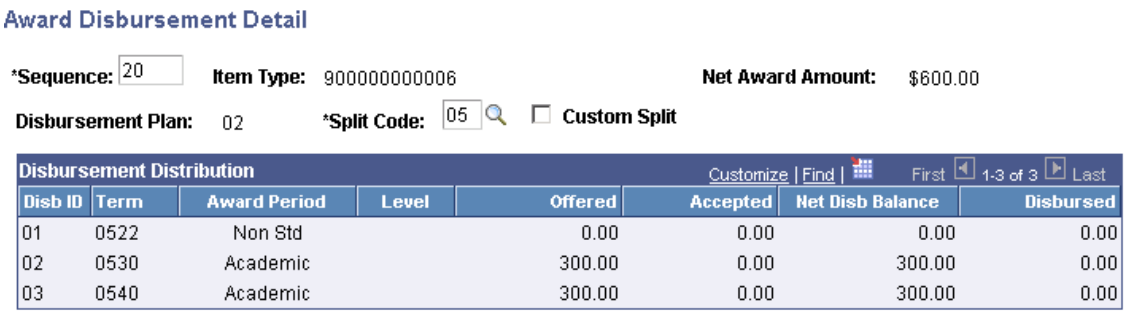


The next two screen shots show the disbursement detail for each instance of the Honor Scholarship.

This example illustrates the Award Disbursement Detail page for the first instance of the Honors Scholarship.



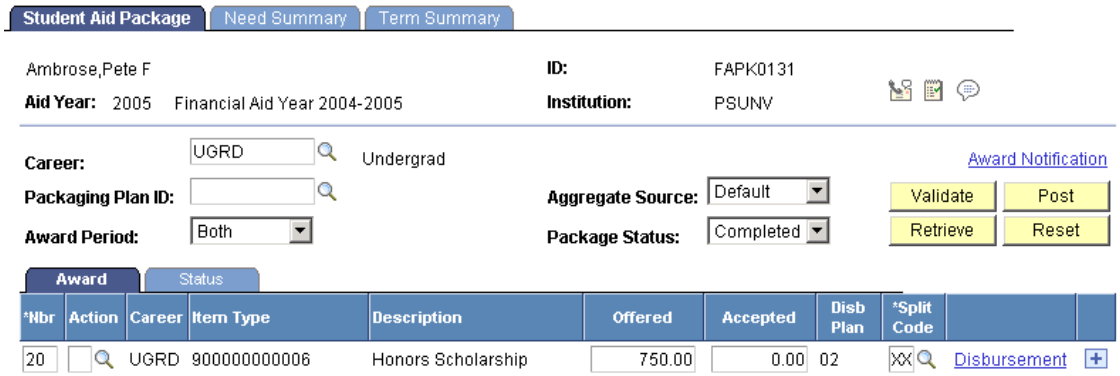
This example illustrates the Award Disbursement Detail page for the second instance of the Honors Scholarship.



The next screen shot shows how the two instances of the University Grant Financial Aid Item Type are combined after posting. Notice that the **Split** field contains *XX,* indicating a custom split:

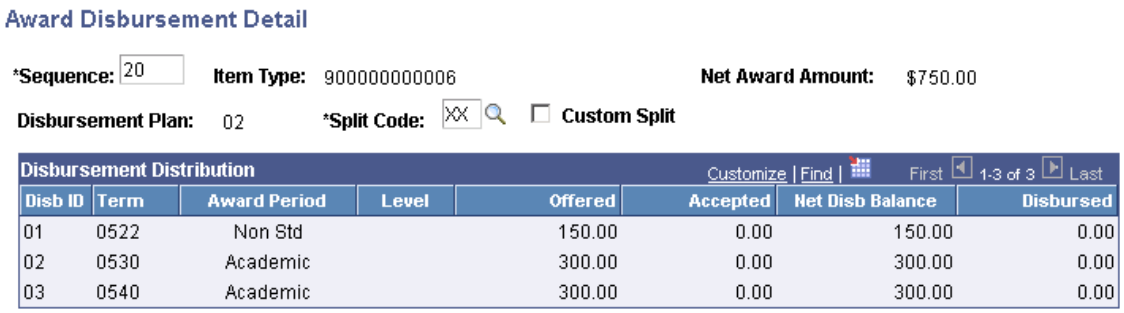
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This example illustrates the Student Aid Package page after posting—the two separate instances are combined, with a custom split.



When you look at the disbursement detail for the University Grant, you can see that Packaging has retained the disbursements dictated by the two separate instances of the University Grant

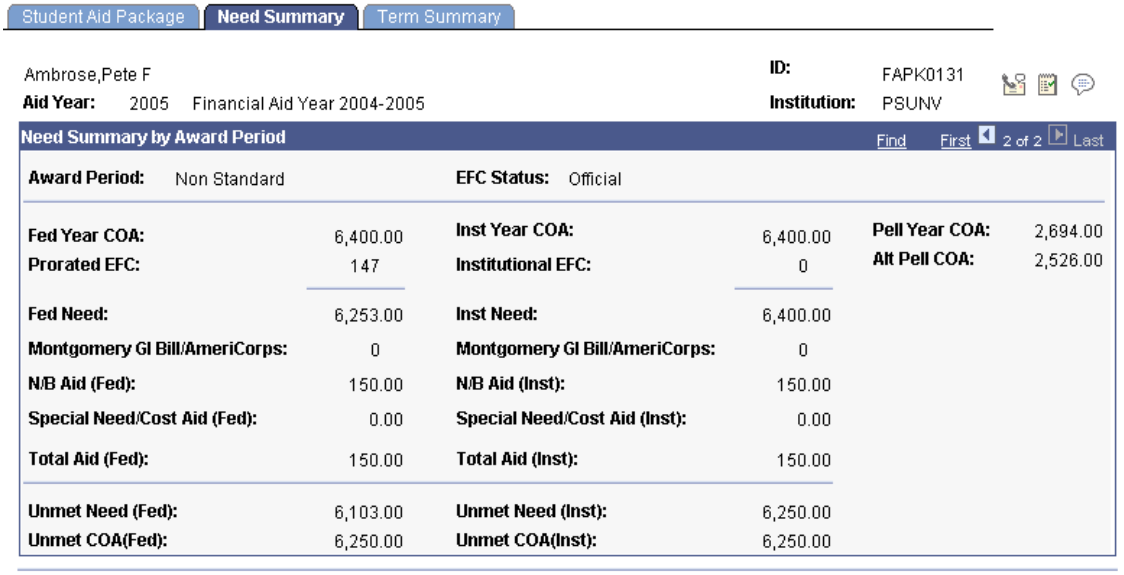
This example illustrates the Award Disbursement Detail page for the combined Honors Scholarship.



The Need Summary page also retains the separate disbursements:

This example illustrates the Need Summary page displaying AAP information and disbursements.

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Student Aid Package | Need Summary | Term Summary

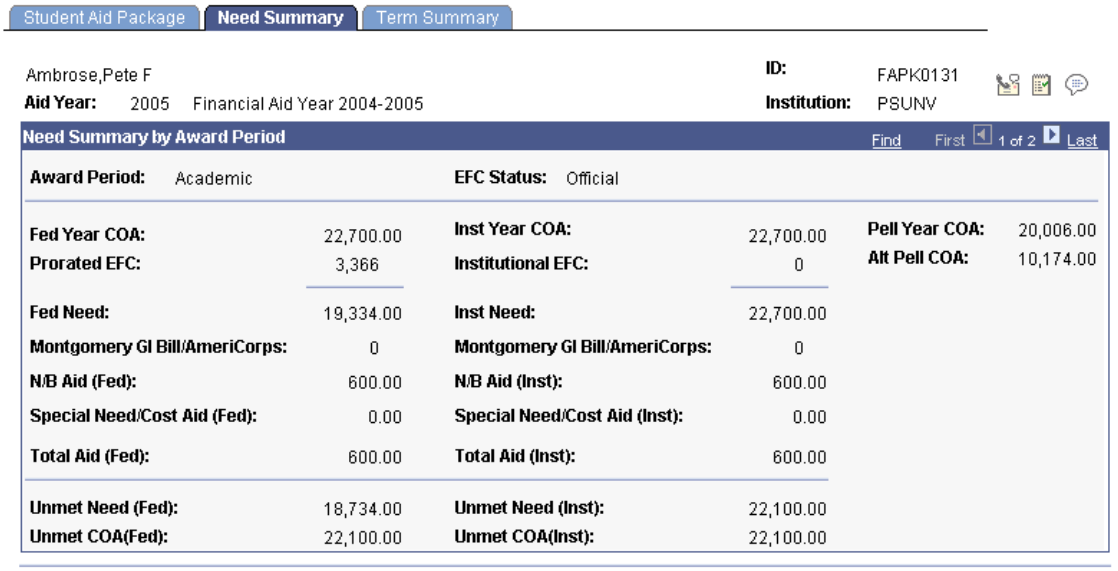
Ambrose,Pete F
ID: FAPK0131
Aid Year: 2005 Financial Aid Year 2004-2005
Institution: PSUNV

Need Summary by Award Period — Find | First 2 of 2 Last

Award Period: Non Standard
EFC Status: Official

Fed Year COA:	6,400.00	Inst Year COA:	6,400.00	Pell Year COA:	2,694.00
Prorated EFC:	147	Institutional EFC:	0	Alt Pell COA:	2,526.00
Fed Need:	6,253.00	Inst Need:	6,400.00		
Montgomery GI Bill/AmeriCorps:	0	Montgomery GI Bill/AmeriCorps:	0		
N/B Aid (Fed):	150.00	N/B Aid (Inst):	150.00		
Special Need/Cost Aid (Fed):	0.00	Special Need/Cost Aid (Inst):	0.00		
Total Aid (Fed):	150.00	Total Aid (Inst):	150.00		
Unmet Need (Fed):	6,103.00	Unmet Need (Inst):	6,250.00		
Unmet COA(Fed):	6,250.00	Unmet COA(Inst):	6,250.00		

This example illustrates the Need Summary page displaying NSAP information and disbursements.


Student Aid Package | Need Summary | Term Summary

Ambrose,Pete F
ID: FAPK0131
Aid Year: 2005 Financial Aid Year 2004-2005
Institution: PSUNV

Need Summary by Award Period — Find | First 1 of 2 Last

Award Period: Academic
EFC Status: Official

Fed Year COA:	22,700.00	Inst Year COA:	22,700.00	Pell Year COA:	20,006.00
Prorated EFC:	3,366	Institutional EFC:	0	Alt Pell COA:	10,174.00
Fed Need:	19,334.00	Inst Need:	22,700.00		
Montgomery GI Bill/AmeriCorps:	0	Montgomery GI Bill/AmeriCorps:	0		
N/B Aid (Fed):	600.00	N/B Aid (Inst):	600.00		
Special Need/Cost Aid (Fed):	0.00	Special Need/Cost Aid (Inst):	0.00		
Total Aid (Fed):	600.00	Total Aid (Inst):	600.00		
Unmet Need (Fed):	18,734.00	Unmet Need (Inst):	22,100.00		
Unmet COA(Fed):	22,100.00	Unmet COA(Inst):	22,100.00		

Important

The disbursement plan/split code pattern enables Packaging to maintain the integrity of each award and therefore its disbursements by award period. Using this functionality, you can use the same Financial Aid Item Type across award periods.

Loans and Sequential Award Period Processing

The origination requirements of loans affect your ability to use sequential award period processing and passive/active mode.

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For non-Direct Loans, like CommonLine or Perkins Loans, regulatory requirements dictate that you cannot assign a disbursement plan/split code pattern with a zero disbursement in any disbursement cycle and, therefore, in any award period. Therefore, you cannot use the usual method for sequential award processing. For example, to award non-Direct Lending loans for sequential AAP and NSAP award periods processing, you must use separate Financial Aid Item Types and disbursement plans: one for the AAP and another for the NSAP.

For Direct Lending loans, you can use the same Financial Aid Item Type for both the AAP and the NSAP. However, you cannot have a zero disbursement in the disbursement cycle of the first term for the Direct Lending loan. This means that you can have a zero disbursement in a trailing summer term, but you cannot have a zero disbursement in a leading summer term.

Processing Simultaneous Award Periods

During simultaneous award period processing, make sure that the packaging plan's award period attribute is *B − Both,* and not *A − Academic* or *N − Non-Standard.* This directs Packaging to use the COA, EFC/SAI, and need for both award periods, and also indicates that all awards for both award periods can be repackaged unless they are locked or have disbursement protection activated.

During simultaneous award period processing, Packaging evaluates maximum eligibility for need across award periods. Packaging first identifies the student's maximum need, and then it schedules disbursements according to need for the respective award period.

For example, you have a student attending for both award periods and you are going to award a University Grant to the student for both award periods at one time. Your semester-based institution treats the summer term as a trailing summer. The following table provides the COA, EFC/SAI, and need for the student—all values are in U.S. dollars (USD):

Need Analysis Element	Academic Award Period	Non-Standard Award Period	Combined
Cost of Attendance	25,000.00	3,200.00	28,200.00
Expected Family Contribution	11,000.00	2,000.00	13,000.00
Need	14,000.00	1,200.00	15,200.00

The total value of the University Grant that you plan to offer the student is 5,000.00 USD. To begin awarding, create a packaging plan with an award period attribute of *Both,* and create a packaging rule for the University Grant with a disbursement plan that spans both the NSAP and the AAP, and a disbursement split code that contains disbursements scheduled in both award periods. For this example, the split code used—split code ID 03—directs Packaging to schedule one disbursement per academic term, with 45 percent of the disbursement awarded in the fall semester, 45 percent of the disbursement awarded in the spring semester, and 10 percent of the disbursement awarded in the trailing summer term. Based on this disbursement plan/split code pattern, Packaging matches the award period attribute for this award (Both).

The following table illustrates how you set up the University Grant award for the student and provides the scheduled disbursements based upon the 45/45/10 split of the 5,000.00 USD total award:

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Seq No	FA Item Type	Disb Plan	Split Code	Disbursements - AAP	Disbursement - NSAP
10	University Grant	10	03	2,250.00 (fall), 2,250.00 (spring) (45% fall, 45% spring)	500.00 (10%)

When Packaging processes the student for this University Grant, it takes into account the COA, EFC/SAI, and need for both award periods. Because the packaging plan award period is Both and the disbursement plan/split code pattern for the University Grant is Both, the COA, EFC/SAI, and need values for the two award periods are combined. The combined need value determines the student's maximum award eligibility. The scheduled disbursements for this award do not exceed the student's eligibility for each award period so they are validated.

Important

Packaging maximizes need per packaging run. This fact is important when EFC/SAI exceeds COA for one award period. This means that need in one award period is not reduced when additional EFC/SAI is available from another award period.

What would happen if EFC/SAI exceeded COA for one award period in the previous example? The same conditions exist: you have a student attending for both award periods, you are going to award a University Grant of 5,000.00 USD to the student for both award periods at one time, and your semester-based institution treats the summer term as a trailing summer. The following table provides the new COA, EFC/SAI, and need for the student—all values are in U.S. dollars (USD):

	Academic Award Period	Non-Standard Award Period	Combined
COA	25,000.00	3,200.00	28,200.00
EFC/SAI	11,000.00	3,400.00	14,400.00
Need	14,000.00	0.00	14,000.00

EFC/SAI exceeds COA for the NSAP. However, because Packaging maximizes need per packaging run, the student's total need for the two award periods is 14,000.00 USD. In other words, Packaging does not apply excess EFC/SAI—200.00 USD in the NSAP—from one award period to the other award period.

To begin awarding, create a packaging plan with an appropriate award period attribute, and create a packaging rule for the University Grant with an appropriate disbursement plan and disbursement split code. For this award, you have several options.

Option 1:

You can assign the University Grant a disbursement plan that is targeted only for the AAP, and a split code that divides the disbursement evenly between the two academic semesters. Based on this disbursement plan/split code pattern, Packaging designates the award period for this award as Academic. The following table provides the scheduled disbursements based upon the 50/50 split of the 5,000.00 USD award where the disbursement plan that spans only the

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AAP has an ID of 15 and the split code that divides the disbursement evenly between the two academic semesters has an ID of 01:

Seq No	FA Item Type	Disb Plan	Split Code	Disbursements - AAP	Disbursement - NSAP
10	University Grant	15	01	2,500.00 (fall), 2,500.00 (spring) (50% fall, 50% spring)	0.00 (No need)

When Packaging processes the student, it takes into account the COA, EFC/SAI, and need for only the designated award period. Because the disbursement plan/split code pattern for the University Grant is targeted to the AAP, only the COA, EFC/SAI, and need values for the AAP are considered. However, other awards within the student's aid package can have disbursement plan/split code patterns that are targeted to both the AAP and NSAP.

Option 2

You can also assign the University Grant the same disbursement plan as in the previous example, spanning both the NSAP and the AAP, and the same disbursement split code (disbursements scheduled in both award periods). For this example, the split code used (split code ID 03) directs Packaging to schedule one disbursement per academic term, with 45 percent of the disbursement awarded in the fall semester, 45 percent of the disbursement awarded in the spring semester, and 10 percent of the disbursement awarded in the trailing summer term. Based on this disbursement plan/split code pattern, Packaging designates the award period attribute for this award as Both. However, because the student does not have need in the NSAP, during validation Packaging distributes the 500.00 USD that would have been scheduled for the trailing summer term among the two semesters of the AAP using relative weighting provided sufficient AAP need remains. Because the disbursement percentages for the fall and spring semesters are equal, each semester receives an additional 250.00 USD.

Packaging determines the relative weighting for each term by dividing the original disbursement percentage of the term, 45 percent, by the sum of all disbursement percentages for terms within the award period, 90 percent. For this example, Packaging does the following calculations:

Remainder Calculation for Fall Semester = 45/90 * 500.00 = 250.00

Remainder Calculation for Spring Semester = 45/90 * 500.00 = 250.00

Total Disbursement for Fall Semester = 250.00 + 2,500.00 = 2,500.00

Total Disbursement for Spring Semester = 250.00 + 2,500.00 = 2,500.00

The following table illustrates how you set up the University Grant award for the student, and provides the scheduled disbursements based upon the redistribution of the 500.00 USD originally scheduled for the NSAP

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Seq No	FA Item Type	Disb Plan	Split Code	Disbursements - AAP	Disbursement - NSAP
10	University Grant	10	03	2,500.00 (fall), 2,500.00 (spring) (45% fall + 45/90 x 500.00, 45% spring + 45/90 x 500.00)	0.00 (10% originally scheduled, but shortage of need)

Related Topics

- Distributing Awards When a Shortage of Need Exists in One Award Period
  To further enhance simultaneous award period processing, Packaging handles a shortage of need in one award period by proportionally redistributing the remainder of the award into the other award period.

Using Passive/Active Mode in Manual Packaging

This section provides an overview of passive/active mode in Manual Packaging and provides examples of:

- Processing sequential award periods.
- Awarding for a single award period followed by both award periods.
- Awarding for both award periods followed by a single award period.

Understanding Passive/Active Mode in Manual Packaging

For Packaging to determine whether awards are active or passive, the process needs to evaluate the award period for which you are packaging the student. Packaging compares the award period for which you are currently packaging against the disbursement plan/split code patterns of existing awards to determine whether to process them as active or passive awards. During Auto and Mass Packaging, Packaging uses the packaging plan award period attribute for this comparison. Because Manual Packaging does not employ packaging plans, the **Award Period** field on the award entry pages enables you to specify the award periods this packaging session covers.

Before you begin awarding manually, select an award period processing mode in the **Award Period** field. The default value for this field is *Both − Both Award Periods,* so if you do not change the value in this field, all existing awards are reevaluated based on need and eligibility for both the academic and NSAPs. After you select an award period processing mode, Packaging evaluates all existing awards to determine which awards fall within the selected award period and, therefore, can be changed. These awards are considered active. You cannot change awards that do not match the selected award period. These awards are considered passive and are made unavailable on the award entry pages.

> **Note**
>
> The **Award Period** field serves as a target for Packaging and is not a characteristic of the awards in this packaging session. This field controls which existing posted awards are treated as active or passive awards.

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To determine which awards you can change, Packaging compares the selected award period against the disbursement plan/split code patterns of existing awards. Packaging does this by evaluating all nonzero disbursement rows for each award. Each disbursement ID within the disbursement plan is tied to a term, and each term has been designated for either the AAP or the NSAP. If all the nonzero disbursements belong to the AAP, Packaging considers the award for AAP processing. If all the nonzero disbursements belong to the NSAP, Packaging considers the award for NSAP processing. If the nonzero disbursements span both the AAP and the NSAP, Packaging considers the award for both AAP and NSAP processing.

Packaging then compares the type of processing (AAP, NSAP, or both) for which an award is eligible based on the selected award period processing mode. If the award period processing mode is *Academic,* then Packaging processes the awards whose nonzero disbursements all fall in the AAP as active awards. If the award period processing mode is *Non-Standard,* then Packaging processes the awards whose nonzero disbursements all fall in the NSAP as active awards. Packaging evaluates awards whose nonzero disbursements span both the AAP and the NSAP in a slightly different fashion than those awards that fall within a single award period. If the award period processing mode is *Academic,* Packaging processes the award as an active award but reevaluates only the portion of the award designated for the AAP. This portion consists of the nonzero disbursements tied to terms designated for that award period. If the award period processing mode is *Non-Standard,* Packaging processes the award as an active award but reevaluates only the portion of the award designated for the NSAP. If the award period processing mode is *Both,* Packaging processes the award as an active award and reevaluates the entire award.

If the disbursement plan/split code pattern of an existing award designates an award period that does not match the selected award period processing mode, the award is passive and therefore cannot be changed by either you or Packaging when submitted for validation. Passive awards are unavailable on the award entry pages to indicate visually that you and Packaging cannot change them. Active awards are open and available on the award entry pages to indicate visually that you and Packaging can change them.

When you add new awards, the disbursement plan/split code pattern of the new award must match or fall within the selected award period processing mode. If the disbursement plan/split code pattern of the award designates it for a single award period (for example, the AAP) that does not match the single award period selected as the award period processing mode *(Non-Standard)* you receive error message 9580 after validation. This message indicates that you must change either the award's disbursement plan/split code pattern or the award period processing mode so that the award's designated award period and the award period processing mode match. If the disbursement plan/split code pattern of the award designates that it is for both award periods when a single award period is selected as the award period processing mode, the Validation process assigns the award only to those disbursement IDs designated for the award period selected as the award period processing mode.

The following three sections describe three different awarding scenarios and the behavior of Packaging.

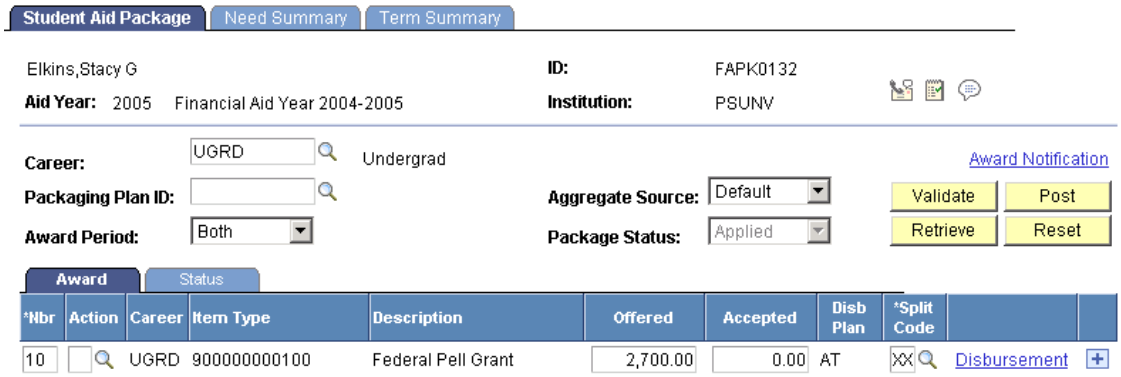
Processing Sequential Award Periods

> **Note**
>
> The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.

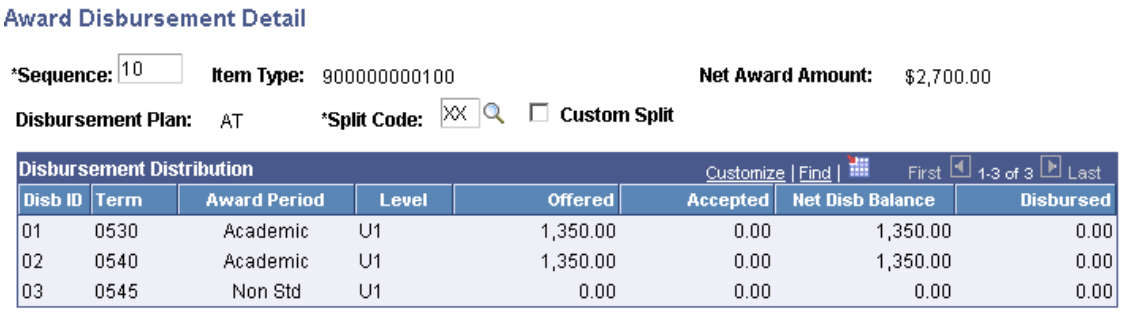
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You can use any of the award entry pages to process the student for discrete award periods. For example, at a semester-based institution with a trailing summer term, you award a student a 2,700 USD Pell Grant for the AAP. The disbursement plan is for both semesters in the AAP, and the split code—set up as a custom split—calls for a 1,350.00 USD disbursement in the fall semester and a 1,350.00 USD disbursement in the spring semester. The following screen shot displays this award on the Student Aid Package page:

This example illustrates the Student Aid Package page displaying the student's award for the AAP (Based on Pell Grant awarding functionality for the 2009 and prior aid years.).



This example illustrates the Award Disbursement Detail page (Based on Pell Grant awarding functionality for the 2009 and prior aid years.).

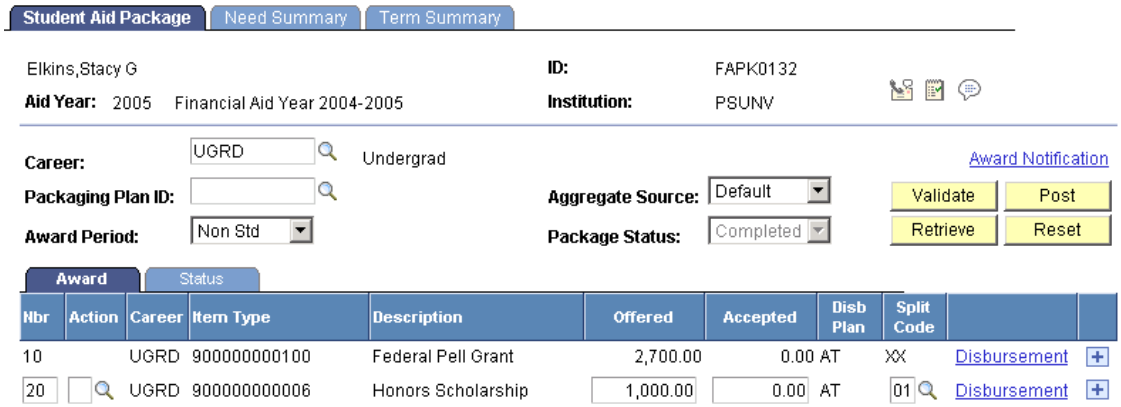


The student then decides to attend the trailing summer term, and you award the student a 1,000.00 USD Honors Scholarship for the NSAP. Before you manually enter this award, you must select *Non Std − Non-Standard* as the award period because you want to process the student for the NSAP and leave the existing Pell Grant award for the AAP untouched. When you select *Non Std − Non-Standard,* Packaging determines that the Pell Grant award is designated for the AAP and does not match the selected award period value, so it treats it as a passive award and makes the row unavailable. Now you cannot change the Pell Grant award, and Packaging does not reevaluate it when you validate the new award.

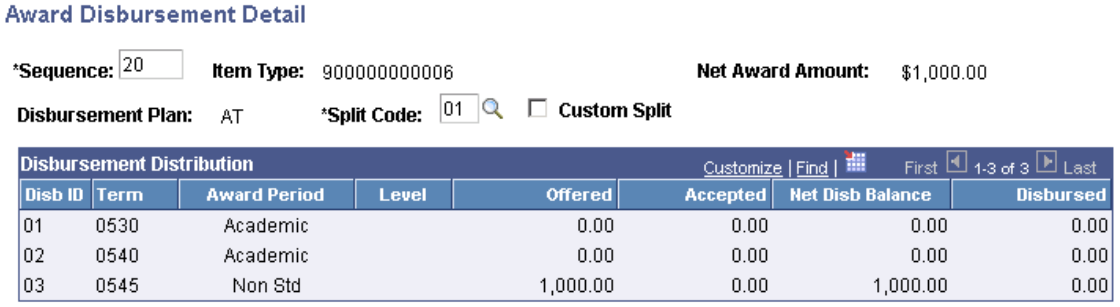
Insert a new row and add the 1,000.00 USD Honors Scholarship with a disbursement plan/split code pattern that distributes the award in the trailing summer term. When you validate this award, Packaging evaluates only this award and processes the Pell Grant award as a passive award.

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This example illustrates the Student Aid Package page with new Honors Scholarship award and Federal Pell Grant (Based on Pell Grant awarding functionality for the 2009 and prior aid years.).



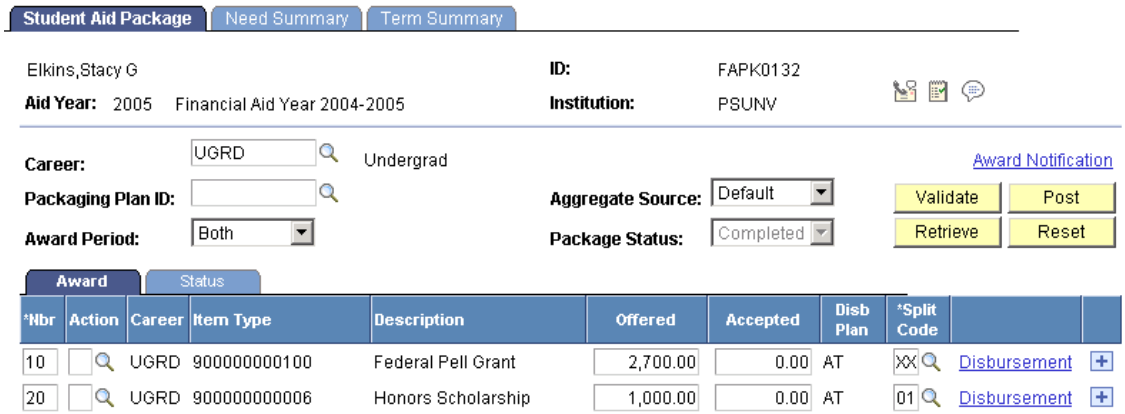
This example illustrates the Award Disbursement Detail page (Based on Pell Grant awarding functionality for the 2009 and prior aid years.).



If you want to reevaluate the student's awards for both award periods, you can selected *Both* as the award period after you have posted the Honors Scholarship. Both the Pell Grant and the Honors Scholarship are then available for changes, and Packaging treats both awards as active awards and reevaluates them based on need and eligibility criteria/rules. These rows remain available and open.

This example illustrates the Student Aid Package page (Based on Pell Grant awarding functionality for the 2009 and prior aid years.).

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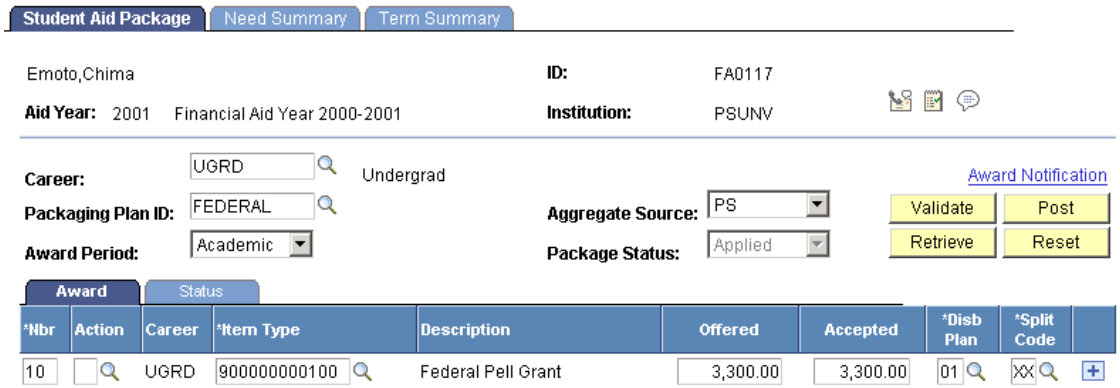
Awarding for a Single Award Period Followed by Both Award Periods

> **Note**
>
> The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.

You can award a student for a single award period, either AAP or NSAP, and later award the student for both award periods. When you award the student for both award periods, all awards—no matter what award period the award's disbursement plan/split code pattern designates—can be changed and are processed as active awards.

For example, at a semester-based institution with a trailing summer term, you award a student a 3,300.00 USD Pell Grant for the AAP. The disbursement plan is for both semesters in the AAP, and the split code—set up as a custom split—calls for a 1,650.00 USD disbursement in the fall semester and a 1,650.00 USD disbursement in the spring semester. The following screen shot displays this award on the Student Aid Package page:

This example illustrates the Student Aid Package page displaying the student's award for the AAP (Based on Pell Grant awarding functionality for the 2009 and prior aid years.).



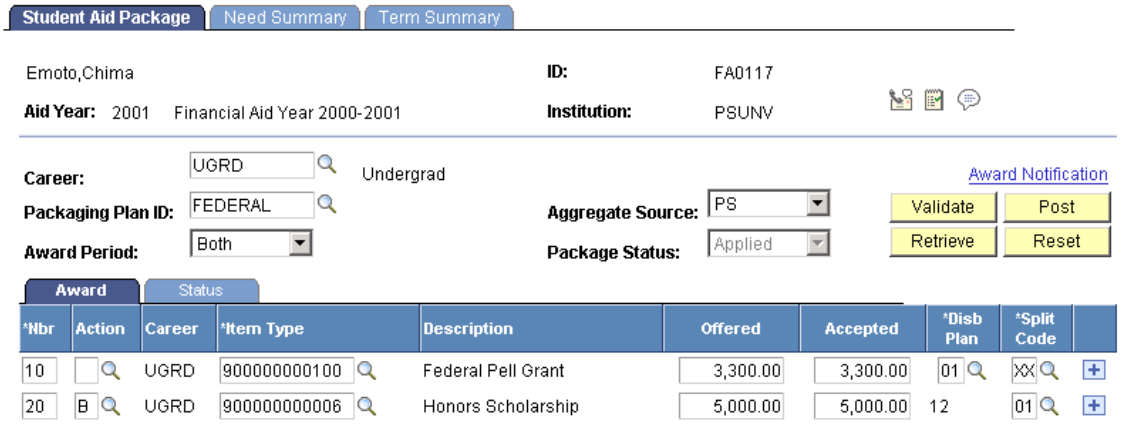
The student is then awarded a 5,000 USD Honors Scholarship that covers the trailing summer term in addition to the academic year, with 40 percent disbursed in fall (AAP), 40 percent

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disbursed in spring (AAP), and 20 percent disbursed in the trailing summer term (NSAP). Before you manually enter this award, you must select *Both* as the **Award Period** because you want to process the student for both the NSAP and the AAP. When you select *Both,* Packaging determines that the Pell Grant award is active because its disbursement plan/split code pattern designates it for the AAP, which falls within the chosen award period processing mode. Now you can change the Pell Grant award, and Packaging reevaluates it when you validate the new award. Because you are only adding the Honors Scholarship, you do not need to change the Pell Grant. Insert a new row, and add the 5,000.00 USD Honors Scholarship, choosing a disbursement plan that spans both award periods, and a split code that distributes the award 40 percent fall, 40 percent spring, and 20 percent summer. When you validate this award, Packaging evaluates both awards.

> **Warning**
>
> If there has been a change in the student's need or eligibility, the existing award is changed unless you have activated disbursement protection for that Financial Aid Item Type. Activating disbursement protection only protects the disbursed portion of the award. The award itself can be reduced to the level of the disbursed amount.

This example illustrates Student Aid Package page with an Award Period value of Both, adding the Honors Scholarship (Based on Pell Grant awarding functionality for the 2009 and prior aid years).



Awarding for Both Award Periods Followed by a Single Award Period

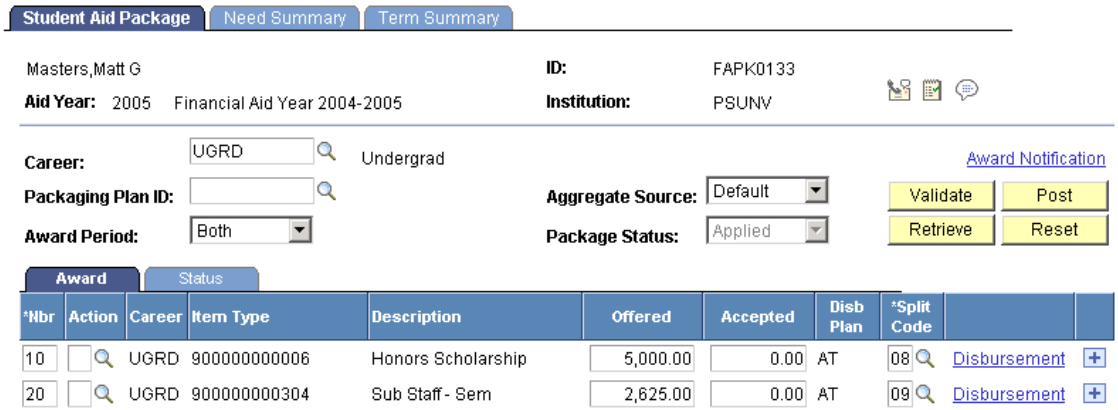
You can award a student for both award periods and later award the student for a single award period, either the AAP or the NSAP. When you award the student for a single award period, only those awards with disbursement plan/split code patterns that fall within or span the designated award period can be changed and are processed as active awards. Awards whose disbursement plan/split code patterns designate an award period that does not match the designated award period mode are treated as passive awards.

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> **Warning**
>
> Although you intend to reevaluate only a single award period, Packaging also reevaluates the portion that falls within that single award period of existing awards that span both award periods. If there has been a change in the student's need or eligibility that warrants a change in the award, Packaging adjusts the existing awards.

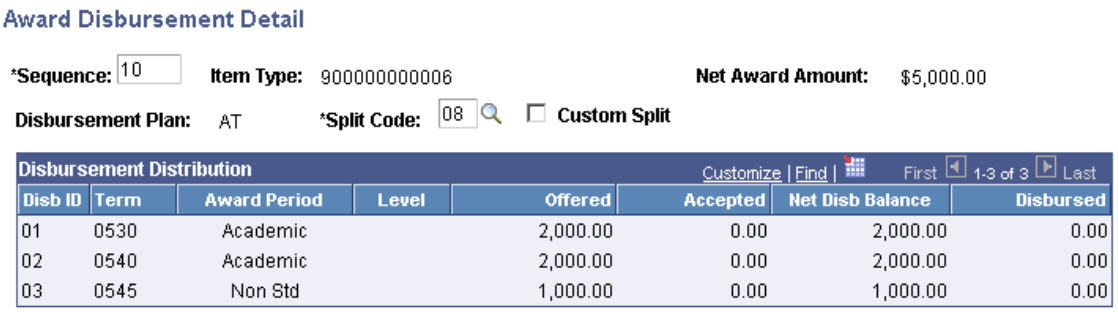
For example, at a semester-based institution with a trailing summer term, you award a student a 5,000 USD Honors Scholarship that covers the trailing summer term in addition to the academic year, with 40 percent disbursed in fall, 40 percent disbursed in spring, and 20 percent disbursed in the trailing summer term. The following screen shot displays this award on the Student Aid Package page:

This example illustrates the Student Aid Package page displaying the student's award for both award periods.



Then you offer the student a 2,625.00 USD subsidized Stafford loan for the academic year. Before you manually enter this award, you must select *Academic* as the award period, because you want to process the student only for the AAP. When you select *Academic,* Packaging determines that the Honors Scholarship is active because its disbursement plan/ split code pattern designates it for both award periods, which spans the chosen award period processing mode of *Academic.*

This example illustrates the Award Disbursement Detail page.

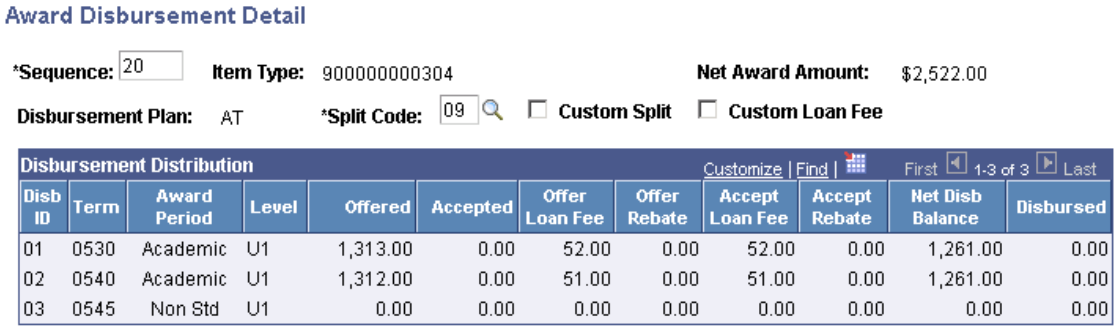


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Now you insert a second row and enter the 2,625 USD subsidized Stafford loan, with a disbursement plan/split code pattern that spans only the AAP. You can also change the Honors Scholarship award, and Packaging reevaluates it for need and eligibility when you validate the new award. However, Packaging changes only the disbursements in the AAP; the NSAP portion of the award remains unchanged.

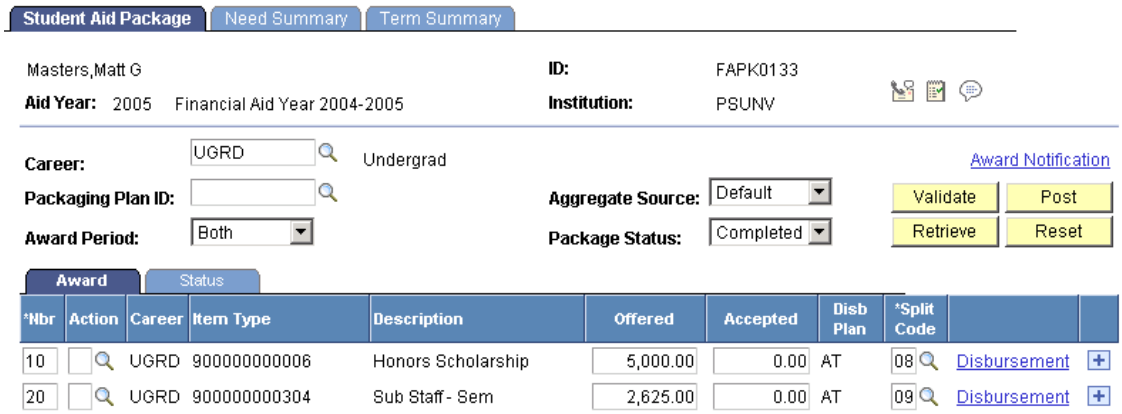
> **Warning**
>
> Even if you do not change or intend to change the Honors Scholarship, the AAP portion of the award is reevaluated automatically by Packaging.

This example illustrates the Award Disbursement Detail page.



Disb ID	Term	Award Period	Level	Offered	Accepted	Offer Loan Fee	Offer Rebate	Accept Loan Fee	Accept Rebate	Net Disb Balance	Disbursed
01	0530	Academic	U1	1,313.00	0.00	52.00	0.00	52.00	0.00	1,261.00	0.00
02	0540	Academic	U1	1,312.00	0.00	51.00	0.00	51.00	0.00	1,261.00	0.00
03	0545	Non Std	U1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

This example illustrates the Student Aid Package page.



*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code		
10		UGRD	900000000006	Honors Scholarship	5,000.00	0.00	AT	08	Disbursement	
20		UGRD	900000000304	Sub Staff - Sem	2,625.00	0.00	AT	09	Disbursement	

Awarding Conditional Aid for Multiple Award Periods

This section clarifies the behavior of conditional awards during multiple award period processing. An important factor in determining how Packaging treats conditional awards is whether federal aid is present in the same award period as the conditional awards. The behavior of conditional awards reverting from "no effect" to "special need" based on the presence of federal aid does not span award periods. Therefore, the presence of federal aid in one award period does not affect the awarding of conditional aid in the subsequent award period. This only applies to sequential award period processing and not simultaneous award

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period processing. The following tables demonstrate that the behavior of conditional aid is determined on an award period basis.

> **Note**
>
> When conditional awards behave like no-effect awards, it is in the sense that the awards are not restricted by the student's need. However, conditional awards are displayed under the **Special Need/Cost Aid** fields on the Need Summary page.

Example A:

Academic Award Period		**Non standard award period**	
Item Type	*Behavior*	*Item Type*	*Behavior*
Conditional Aid 1	No Effect	Conditional Aid 3	No Effect
Federal Aid 1		Federal Aid 2	
Conditional Aid 2	Special Need/Cost	Conditional Aid 4	Special Need/Cost

Example B

Academic Award Period		**Non standard award period**	
Item Type	*Behavior*	*Item Type*	*Behavior*
Federal Aid 1		Conditional Aid 1	No Effect

Example C

Non standard award period		**Academic Award Period**	
Item Type	*Behavior*	*Item Type*	*Behavior*
Federal Aid 1		Conditional Aid 1	No Effect
		Federal Aid 2	
		Conditional Aid 2	Special Need/Cost

Example D

Non standard award period		**Academic Award Period**	
Item Type	*Behavior*	*Item Type*	*Behavior*
Conditional Aid 1	No Effect	Federal Aid 1	
		Conditional Aid 2	Special Need/Cost
		Federal Aid 2	

If federal aid does not have disbursements scheduled in the same award period as the conditional award, the student's remaining need does not restrict the amount of the conditional award. The student's need does not restrict the conditional award amount because the federal aid is being processed as a passive award, and therefore does not affect calculations for the active award period. For example, a student's award package includes a subsidized Stafford loan for 3,000.00 USD—with disbursements of 1,500.00 USD in the fall and spring semesters—and a conditional University Grant for 1,000.00 USD with a disbursement in the trailing

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summer term. Because the Stafford loan does not have disbursements in the NSAP, Packaging processes the Stafford loan as a passive award leaving it untouched when it processes the University Grant. Therefore, the University Grant behaves as a *no effect* award because the Stafford loan is not present in the NSAP.

When federal aid has disbursements in the same award period as the conditional award, and the federal aid precedes the conditional award, Packaging treats the conditional award as a special need/cost item type. Consequently, the placement of the conditional award relative to existing federal aid affects the student's conditional award amount. If the conditional award precedes federal aid, Packaging treats the conditional award as a "no effect" award and increases the student's total aid amount without regard for need or COA limits. If the conditional award follows federal aid, Packaging treats it as a special need/cost item type, first determining if unmet need exists to award. If so, Packaging compares the remaining unmet COA against the EFC/SAI and awards up to the lesser of the two.

When you use sequential award period processing, you can change the sequence of the conditional award from one award period to the next. The behavior of the conditional award can be different from one award period to the next based on the presence or absence of federal aid. If the NSAP does not have federal aid, but the AAP does, you can decide whether the conditional award behaves as a "no effect" award in both award periods. If you have the conditional award precede federal aid in the AAP, the conditional award behaves as a "no effect" award in both award periods. Or you can choose to have the conditional award follow federal aid in the AAP, so that the conditional award behaves as a special need/cost item type in the AAP and as a "no effect" award in the NSAP. You cannot do this if you use simultaneous award period processing because only one instance of the conditional award exists, and, therefore, only one sequence number for that award.

Important

Using sequential award period processing to change the behavior of conditional awards from one award period to the next is only possible when you use Auto and Mass Packaging. If you use Manual Packaging when you process the student for the second award period, all awards—existing and offered—are evaluated as they are in simultaneous award period processing.

Distributing Awards When a Shortage of Need Exists in One Award Period

To further enhance simultaneous award period processing, Packaging handles a shortage of need in one award period by proportionally redistributing the remainder of the award into the other award period.

For example, you have a student who attending your quarter-based institution for the AAP as well as the trailing summer non-standard term. The student's COA, EFC/SAI, and need are given in the following table:

Need Analysis Element	Academic Award Period	Non-Standard Award Period	Combined
Cost of Attendance	25,000.00 USD	3,200.00 USD	28,200.00 USD
Expected Family Contribution	11,000.00 USD	3,000.00 USD	14,000.00 USD

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Need Analysis Element	Academic Award Period	Non-Standard Award Period	Combined
Need	14,000.00 USD	200.00 USD	14,200.00 USD

The first award in the student's award package is a 4,000.00 USD University Grant that has a disbursement plan that spans both award periods and a split code that distributes the award among all four terms evenly (25 percent fall, 25 percent winter, 25 percent spring, and 25 percent summer). Based on this disbursement split code, the student should receive 3,000.00 USD in the AAP—1,000.00 USD per quarter—and 1,000.00 USD during the NSAP. Because the 1,000.00 USD in the NSAP exceeds the student's 200.00 USD need, Packaging distributes the remaining 800.00 USD (1,000.00 USD minus 200.00 USD) among the three terms in the AAP provided sufficient AAP need remains. This is based on the relative weighting of the original disbursement percentages that pertain to the AAP portion of the disbursement plan/split code pattern. Packaging determines the relative weighting for each term by dividing the original disbursement percentage of the term, 25 percent, by the sum of all disbursement percentages for terms within the award period, 75 percent. For this example, Packaging does the following calculations:

Remainder Calculation for Fall Quarter = 25/(25 + 25 + 25) * 800.00 = 266.66

Remainder Calculation for Winter Quarter = 25/(25 + 25 + 25) * 800.00 = 266.66

Remainder Calculation for Spring Quarter = 800.00 - 266.66 - 266.66 = 266.68

Total Disbursement for Fall Quarter = 266.66 + 1,000.00 = 1,266.66

Total Disbursement for Winter Quarter = 266.66 + 1,000.00 = 1,266.66

Total Disbursement for Spring Quarter = 266.68 + 1,000.00 = 1,266.68

> **Note**
>
> When calculating the relative weight of a disbursement percentage, the system is precise to the seventh position beyond the decimal point. This precise figure is multiplied by the remainder, and then rounded using the Rounding Option set up for the Financial Aid Item Type.

The following table shows the projected disbursements prescribed by the split code and the projected disbursements that are based on relative weighting:

Disbursement Based on:	Fall Quarter (in USD)	Winter Quarter (in USD)	Spring Quarter (in USD)	Summer Term (in USD)
Prescribed Disbursement Split Percent	1,000.00 (25% x 4,000.00)	1,000.00 (25% x 4,000.00)	1,000.00 (25% x 4,000.00)	1,000.00 (25% x 4,000.00)
Relative Weighting to Account for Need	1,266.66 (25/75 x 4,000.00)	1,266.66 (25/75 x 4,000.00)	1,266.68 (25/75 x 4,000.00)	200.00 (Need)

This relative weighting functionality enables you to continue to award students until their remaining need is exhausted while maintaining a proportional disbursement spread similar to each award's original disbursement percentages.

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When Packaging distributes the award proportionally because of a shortage of need, it returns one of the following messages.

Message Number	Message Text	Explanation
9155	FM disbursements recalculated; award period need less than projected.	The award has been recalculated because a portion of the award exceeds FM Need for that award period. This is the message that appears for Need-based aid.
9156	FM disbursements recalculated; award period cost less than projected.	The award has been recalculated because a portion of the award exceeds FM cost for that award period. This is the message that appears for Cost-based aid.
9157	FM disbursements recalculated; award period special need/cost less than projected.	The award has been recalculated because a portion of the award exceeds FM Special Need/Cost for that award period. This is the message that appears for Special Need/Cost Financial Aid Item Types.
9158	IM disbursements recalculated; award period need less than projected.	The award has been recalculated because a portion of the award exceeds IM Need for that award period. This is the message that appears for Need-based aid.
9159	IM disbursements recalculated; award period cost less than projected.	The award has been recalculated because a portion of the award exceeds IM cost for that award period. This is the message that appears for Cost-based aid.
9160	IM disbursements recalculated; award period special need/cost less than projected.	The award has been recalculated because a portion of the award exceeds IM Special Need/Cost for that award period. This is the message that appears for Special Need/Cost Financial Aid Item Types.

Protecting Disbursements During Awarding

This section provides an overview of disbursement protection and provides examples of:

- Disbursement protection for fully disbursed terms.
- Even across disbursements by term with disbursement protection turned off.
- Even across disbursements by term with disbursement protection turned on.
- Even among first disbursement by term with disbursement protection turned off.
- Even among first disbursement by term with disbursement protection turned on.

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Understanding Disbursement Protection

Packaging contains functionality that enables you to choose whether you want disbursed amounts to be protected when repackaging a student. When you activate disbursement protection, Packaging does not repackage an award below what has already been disbursed. To invoke disbursement protection, the award must meet four conditions:

1. The award is for a non-Direct Loan Financial Aid Item Type.
2. You indicate at the Financial Aid Item Type level—using the **Disbursement Protection** check box—that Packaging should protect the disbursed portion of an award.
3. The award's disbursement split code uses an even split option of either *Even among first disbursements by term* or *Even across disbursements by term.*

   If you do not use a split code with an even split option, the system does *not* observe disbursement protection. Instead, Packaging honors the split percentages defined by the specific Financial Aid Item Type and splits the award amount accordingly, which may result in one or more unequal disbursements.

   Any loan award, Direct Loan or Non-Direct Loan, with a custom loan fee is considered having a custom split, *not* an even split, and is, therefore, not subject to disbursement protection.
4. The award has one or more disbursed entries.

When disbursement protection is activated, the award cannot fall below the disbursed amount; however, you can still manually un-disburse the award if you feel a student is no longer eligible for the award.

When you modify a disbursement-protected award, Packaging recalculates the total disbursement amount for each term, using the entire new award amount (rather than the residual or difference between the original award and the revised award). This value is referred to as the *term target amount.* After the term target amount is determined, Packaging evaluates the even split option to determine how to split the award within the term. If disbursed amounts exist, Packaging checks to see if the disbursements are greater or less than the term target amount. If the disbursements are less than the term target amount, Packaging distributes to the term target amount while protecting the existing disbursed amounts. If the disbursed amount is greater than the term target amount, Packaging distributes the residual amount—total award amount less the disbursed amount—to the next term while protecting the existing disbursed amounts. Packaging then determines whether subsequent terms are partially disbursed or fully disbursed. If the term is partially disbursed, then the term target amount drives that term's distribution. If the term is fully undisbursed, then Packaging distributes residual amounts from fully disbursed terms into undisbursed terms.

If all disbursement IDs for the designated award period—determined by the packaging plan or the **Award Period** field on the award entry pages—are fully disbursed, then Packaging adds the residual amount to the last disbursement ID of the award period. If the designated award period is Both, Packaging adds the entire residual amount to the last disbursement ID of the second award period if the student's need for that award period is equal to or greater than the residual amount. If the student's need for the second award period is less than the residual amount, Packaging adds the amount of the student's need to the last disbursement ID of the second award period. It then adds the remainder of the residual amount to the last disbursement ID of the first award period. The following section provides examples of disbursement protection behavior when all of the designated award period's disbursement IDs are fully disbursed.

The even split option you choose—*Even among first disbursements by term* or *Even across disbursements by term*—and whether you have selected the **Disbursement Protection** check

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box affects how Packaging distributes the disbursements after an award increase or award decrease. The examples in the following sections demonstrate the possible combinations of even split options with disbursement protection turned on or off.

You cannot manually set the award amount to zero with an award action of *B—Offer/Accept* and have the Validation process return the maximum eligible award amount for a disbursement protected award. If you enter zero as the award amount, the Validation process returns the award with its original award amount and schedules disbursement valuation without making any changes. If you want the award amount to be zero (eliminate the award), then you must manually cancel the award by using the award action of *Cancel.*

In Auto and Mass Packaging, you cannot effectively reduce a disbursement-protected award to a desired amount because the award is generated by the packaging plan rather than you being able to enter a specific amount. Packaging first cancels existing awards that are not locked and do not have disbursed amounts. If a portion of the award has been disbursed, then Packaging reduces the award to the disbursed amount. For example, if, from an award of 1,000.00 USD, 500.00 USD has been disbursed and a rule exists to repackage the student, the system reduces the award to 500.00 USD. Packaging then creates new instances for the awards contained in the packaging plan. Packaging processes the second instance of the same Financial Aid Item Type independently of the first instance, and the award amount for this instance uses the aggregate, item type, and fiscal limits of that packaging rule to determine its maximum eligibility. However, the amount that has already been disbursed—preserved in the first instance—is added to the total award amount from the second instance. Continuing the previously given example, the student receives the 500.00 USD plus whatever additional award Packaging determines the student is eligible for. Therefore, it is impossible make a reduction when you repackage the student using Auto or Mass Packaging.

For example, a student has a 3,000 USD University Loan that has disbursement protection activated, with a disbursement plan (ID 15) that covers the institution's two semesters and uses an even split option of *Even among first disbursements by term.* The student also has a 1,000.00 USD Honors Scholarship that does not have disbursement protection activated, with the same disbursement plan as the University Loan but a split code—02—that distributes the award entirely in the first disbursement ID of the spring semester. You have already disbursed the fall disbursement ID to the student. The following table shows the scheduled disbursements. Disbursed amounts are in bold, and all amounts are in USD:

Seq	FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb ID 01 (fall)	Disb ID 02 (spring)
10	University Loan	15	01	Accepted	3,000.00	1,500.00	1,500.00
20	Honors Scholarship	15	02	Accepted	1,000.00	0.00	1,000.00

Then the student's need changes and you attempt to decrease the University Loan to 2,000.00 USD using Auto or Mass Packaging. The first step Packaging takes is to attempt to cancel all existing awards that are not locked. Neither existing award is locked; however, Packaging does not cancel the University Loan because a portion of the award has been disbursed and disbursement protection is activated. Packaging decreases the amount of the award to match the disbursed amount, and cancels the Honors Scholarship. Then Packaging inserts a new instance of the University Loan with an amount of 2,000.00 USD.

Seq	FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb ID 01 (fall)	Disb ID 02 (spring)
10	University Loan	15	01	Accepted	1,500.00	1,500.00	0.00

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Seq	FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb ID 01 (fall)	Disb ID 02 (spring)
20	Honors Scholarship	15	02	Cancelled	0.00	0.00	0.00
30	University Loan	15	01	Offer/ Accept	2,000.00	1,000.00	1,000.00

Because Packaging preserves the first instance of the University Loan—for the disbursed portion of the award—due to disbursement protection, as well as adding the second instance of the University Loan, the total award amount for the University Loan is increased to 3,500.00 USD (2,500.00 USD in the fall and 1,000.00 USD in the spring) instead of reduced to 2,000.00 USD. Additional examples of Auto and Mass Packaging behavior during award increases and decreases are in the following sections.

> **Note**
>
> You do not have to process multiple award periods to invoke disbursement protection. It works whether you are processing multiple award periods or processing awards only for a single award period.

Related Topics

- Processing Direct Loan Adjustments
  Award and disbursement details from the Packaging process are used in Loan Origination records to support COD processing of Direct Loans. COD can accept and process up to 20 disbursements for each award with the disbursement number indicated in the COD Disbursement Number field. Therefore, you can allocate up to 20 potential disbursements when setting up any of the Direct Loan Financial Aid Item Types: Stafford (subsidized and unsubsidized) and PLUS (parent and graduate student PLUS). The Loan Origination process updates loan origination information based on award adjustments in the context of an award's Disbursement IDs as created under the rules set by its Financial Aid Item Type and Disbursement Plan/Split Code Formula.

Illustrating Disbursement Protection for Fully Disbursed Terms

The following examples illustrate the behavior of disbursement protection when you have fully disbursed all disbursement IDs within a designated award period.

> **Note**
>
> The behavior of disbursement protection for fully disbursed terms is the same for both even split options, *Even across Disbursements by term* and *Even among first disbursements by term.*

Single Award Period

In this example, the even split option is *Even among first disbursements by term* with disbursement protection turned on for a semester-based institution with two disbursement IDs

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per term and a trailing summer. The tables display the distribution of an original award amount and then an example of how the system distributes an increase to an award.

The original award amount is 1,000.00 USD, the term target amount is 500.00 USD, and the designated award period is *Academic.* The full 1,000.00 USD has already been disbursed using all the disbursement IDs for the AAP.

Term	Fall Disbursement		Spring Disbursement		Summer Disbursement	
Term Target Amount	500.00 USD		500.00 USD		0.00 USD	
Scheduled Amount	500.00	0.00	500.00	0.00	0.00	0.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	250.00	250.00	250.00	250.00	0	0

After fully disbursing the award, you increase the award from the original award amount of 1,000.00 USD to 2,500.00 USD. Packaging takes the residual amount (1,500.00 USD) and adds it to the last disbursement ID of the designated award period (D 04). The new total amount for D 04 is 1,750.00 USD (250.00 USD + 1,500.00 USD).

Term	Fall Disbursement		Spring Disbursement		Summer Disbursement	
Previously Disbursed Amount	250.00	250.00	250.00	250.00	0.00	0.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
New Amount	250.00	250.00	250.00	1,750.00	0	0

Both Award Period (Sufficient Need in Second Award Period)

In this example, the even split option is *Even among first disbursements by term* with disbursement protection turned on for a semester-based institution with two disbursement IDs per term and a leading summer. The tables display the distribution of an original award amount and then an example of how the system distributes an increase to an award.

The original award amount is 1,000.00 USD, the term target amount is 333.33 USD, and the designated award period is *Both.* The student's remaining need for the NSAP is 1,000.00 USD and for the AAP is 5,000.00 USD. The full 1,000.00 USD has already been disbursed using all the disbursement IDs for the both the Non-Standard and AAPs.

Term	Summer Disbursement		Fall Disbursement		Spring Disbursement	
Term Target Amount	333.33 USD		333.33 USD		333.34 USD	
Scheduled Amount	333.33	0.00	333.33	0.00	333.34	0.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	133.33	200.00	133.33	200.00	133.34	200.00

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After fully disbursing the award, you increase the award from the original award amount of 1,000.00 USD to 2,500.00 USD. Packaging takes the residual amount (1,500.00 USD) and adds it to the last disbursement ID of the second award period (D 06). The new total amount for D 06 is 1,700.00 USD (200.00 USD + 1,500.00 USD), which is less than the remaining need for the AAP.

2,500.00 USD (Increased Amount)						
Term	Summer	Fall	Spring			
Previously Disbursed Amount	133.33	200.00	133.33	200.00	133.33	200.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
New Amount	133.33	200.00	133.33	200.00	133.34	1,700.00

Both Award Period (Insufficient Need in Second Award Period)

In this example, the even split option is *Even across disbursements by term* with disbursement protection turned on for a semester-based institution with two disbursement IDs per term and a trailing summer. The tables display the distribution of an original award amount and then an example of how the system distributes an increase to an award.

The original award amount is 1,500.00 USD, the term target amount is 500.00 USD, and the designated award period is *Both.* The student's remaining need for the AAP is 5,000.00 USD and for the NSAP is 1,000.00 USD. The full 1,000.00 USD has already been disbursed using all the disbursement IDs for the both the Non-Standard and AAPs.

Term	**Fall Disbursement**		**Spring Disbursement**		**Summer Disbursement**	
Term Target Amount	500.00 USD		500.00 USD		500.00USD	
Scheduled Amount	250.00	250.00	250.00	250.00	250.00	250.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	250.00	250.00	250.00	250.00	250.00	250.00

After fully disbursing the award, you increase the award from the original award amount of 1,500.00 USD to 3,000.00 USD. When Packaging takes the residual amount (1,500.00 USD) and attempts to add it to the last disbursement ID of the second award period (D 06), the disbursements for the NSAP exceed remaining need. Then Packaging determines the difference between the existing disbursement amounts (500.00 USD) and the remaining need (1,000.00 USD), and adds this amount (500.00 USD) to D 06. The new amount for D 06 is 750.00 USD (250.00 USD + 500.00 USD). Packaging adds the rest of the residual amount (1,000.00 USD) to the last disbursement ID of the first award period, D 04. The new amount for D 04 is 1,250.00 USD.

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Term	Fall Disbursement		Spring Disbursement		Summer Disbursement	
Previously Disbursed Amount	250.00	250.00	250.00	250.00	250.00	250.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
New Amount	250.00	250.00	250.00	1,250.00	250.00	750.00

Illustrating Even Across Disbursements by Term with Disbursement Protection Turned Off

The following illustrates an example of the even split option, *Even Across Disbursements by Term* with disbursement protection turned off for a quarter-based institution with two disbursement IDs per term. The tables display the distribution of an original award amount and then an example of how the system distributes a decrease to an award.

The original award amount is 3,000.00 USD, the term target amount is 1,000.00 USD, and 500.00 USD has already been disbursed in the disbursement ID 01.

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	1,000.00 USD		1000.00 USD		1,000.00 USD	
Scheduled Amount	500.00	500.00	500.00	500.00	500.00	500.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	500.00	0	0	0	0	0

After the first disbursement for fall term, you reduce the award from the original award amount of 3,000.00 USD to 2,700.00 USD. The term target becomes 900.00 USD. The student already received 500.00 USD, but with disbursement protection turned off, the system recalculates the remaining disbursements to be 450.00 USD with a disbursement adjustment of 50.00 USD. When you run Authorization/Disbursement, the system adjusts the disbursement by 50.00 USD.

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	900.00 USD		900.00 USD		900.00USD	
Scheduled Amount	450.00	450.00	450.00	450.00	450.00	450.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	450.00	0	0	0	0	0

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Illustrating Even Across Disbursements by Term with Disbursement Protection Turned On

The following illustrates an example of the even split option, *Even Across Disbursements by Term* with disbursement protection turned on for a quarter-based institution with two disbursement IDs per term. The tables display the distribution of an original award amount and then examples of how the system distributes decreases and increases to an award.

The original award amount is 3,000.00 USD, the term target amount is 1,000.00 USD, and 500.00 USD has already been disbursed.

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	1,000.00 USD		1,000.00 USD		1000.00 USD	
Scheduled Amount	500.00	500.00	500.00	500.00	500.00	500.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	500.00	0	0	0	0	0

After disbursing disbursement ID 01 for fall term, you reduce the award from the original award amount of 3,000.00 USD to 2,700.00 USD. The term target becomes 900.00 USD. The following table shows how the system recalculates the disbursement for disbursement ID 02 to be the difference between the term target amount and what has already been disbursed for the fall term. The next disbursement ID for winter is also shown:

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	900.00 USD		900.00 USD		900.00 USD	
Scheduled Amount	500.00	400.00	450.00	450.00	450.00	450.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	500.00	400.00	450.00	0	0	0

After disbursing disbursement ID 03 for winter term, you increase the award to 4,500.00 USD. The term target amount becomes 1,500.00 USD. The system first calculates a new term target amount of 1,500.00 USD per term. Because disbursement protection is turned on, the disbursements that occurred in ID 01, ID 02, and ID 03 remain protected. Also, because the fall term is fully disbursed for 900.00 USD, the term target amount of 1,500.00 USD cannot be met. As a result, this creates residual amount of 600.00 USD. This 600.00 USD residual is distributed among any subsequent fully undisbursed terms.

Because the winter term is a partially disbursed term where the existing disbursed amount is less than the term target amount, the system subtracts what has been disbursed (450.00 USD) from the term target amount (1,500.00 USD) and distributes the difference (1,050.00 USD) to the remaining undisbursed ID in the winter term.

Finally, moving to the spring term, because it's a fully undisbursed term, the system adds any residual amount from any fully disbursed previous terms (600.00 USD in this case) to the

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spring term target amount (1,500.00 USD) totaling 2,100.00 USD. The system then spreads this new term target amount evenly among all undisbursed IDs in the spring term.

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	1,500.00 USD		1,500.00 USD		1,500.00 USD	
Scheduled Amount	500.00	400.00	450.00	1,050.00	1,050.00	1,050.00
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	500.00	400.00	450.00	0	0	0

Illustrating Even Among First Disbursement for Term with Disbursement Protection Turned Off

The following illustrates an example of the even split option, *Even Among First Disbursement for Term* with disbursement protection turned off for a quarter-based institution with two disbursement IDs per term. The tables display the distribution of an original award amount and then an example of how the system distributes a decrease to an award.

The original award amount is 3,000.00 USD, the term target is 1,000.00 USD, and the first disbursement has been disbursed.

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	1,000.00 USD		1,000.00 USD		1,000.00 USD	
Scheduled Amount	1,000.00	0	1,000.00	0	1,000.00	0
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	1,000.00	0	0	0	0	0

If you reduce the award to 2,700.00 USD, the term target amount becomes 900.00 USD. Because disbursement protection is turned off, the originally scheduled disbursement amount is recalculated to the term target amount of 900.00 USD with a disbursement adjustment of 100.00 USD. When you run the authorization and disbursement processes, the system adjusts the disbursement by 100.00 USD.

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	900.00 USD		900.00 USD		900.00 USD	
Scheduled Amount	900.00	0	900.00	0	900.00	0
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	900.00	0	900.00	0	900.00	0

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Illustrating Even Among First Disbursement for Term with Disbursement Protection Turned On

The following illustrates an example of the even split option, *Even Among First Disbursements for Term* with disbursement protection turned on. The tables display the distribution of an original award amount and then examples of how the system distributes increases and decreases to an award.

The original award amount is 3,000.00 USD, the term target amount is 1,000.00 USD, and the disbursement ID 01 of 1,000.00 USD has already been disbursed:

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	1,000.00 USD		1,000.00 USD		1,000.00 USD	
Scheduled Amount	1,000.00	0	1,000.00	0	1,000.00	0
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	1,000.00	0	0	0	0	0

After disbursement ID 01 for fall term, you increase the award to 4,500.00 USD. The term target amount becomes 1,500.00 USD. The system determines the amount that the student receives in the remaining disbursements by awarding additional amounts up to the term target for the first term. In this case, 1,000.00 USD has already been disbursed for disbursement ID 01. The system schedules a 500.00 USD disbursement in disbursement ID 02 of the fall term. The fall disbursements now meet the term target amount. The remaining winter and spring terms are fully undisbursed with no residual overflow created in the fall term. Therefore, the system observes the term target amount of 1,500.00 USD.

Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Term Target Amount	1,500.00 USD		1,500.00 USD		1,500.00 USD	
Scheduled Amount	1,000.00	500.00	1,500.00	0	1,500.00	0
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	1,000.00	500.00	0	0	0	0

After the disbursements for fall term, you reduce the award to 2,700.00 USD. The term target becomes 900.00 USD. The student has already received 1,500.00 USD for the fall term. This creates a shortage of 600.00 USD. The following table displays how the system recalculates the scheduled amounts for the terms. The system deducts the already disbursed amount of 1,500.00 USD from the new award amount of 2,700.00 USD leaving a difference of 1,200.00 USD. Because the winter and spring terms are fully undisbursed, the system splits the 1,200.00 USD difference evenly among both terms creating a new term target amount of 600.00 USD. Because the even split option is even among first disbursement for the term, only the first disbursement ID for each remaining term contains 600.00 USD.

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Term	Fall Disbursement		Winter Disbursement		Spring Disbursement	
Original Term Target Amount	900.00 USD		900.00 USD		900.00 USD	
Modified Term Target Amount. Due to Disbursed Monies	1,500.00 USD		600.00 USD		600.00. USD	
Scheduled Amount	1,000.00	500.00	600.00	0	600.00	0
Disbursement ID	D 01	D 02	D 03	D 04	D 05	D 06
Disbursed Amount	1,000.00	500.00	0	0	0	0

Reviewing One-Term DL Loan Functionality

This section provides an overview of one-term DL loan functionality and discusses how to:

- Define a single-term loan.
- Award a single-term loan after the midpoint.
- Associate rules with one-term DL processing.
- Review disbursement ID scenarios.

Understanding One-Term DL Loan Functionality

Federal regulations require that a single term loan be split into at least two disbursements. The one-term option is designed for schools using direct loan MPN processing. This functionality is also available for those non-DL item types that have the disbursement protection flag activated.

If the loan period consists of only one semester, the first half of the loan is disbursed at the beginning of the semester. The second half is disbursed at the calendar midpoint of the semester. For any loan period, if more than half of the loan period has elapsed before an initial disbursement has been made, a single disbursement of the entire loan may be made. After an initial disbursement is authorized and disbursed, you can repackage (increase or decrease) the award in the same manner as is currently in place for multi-item DL awards.

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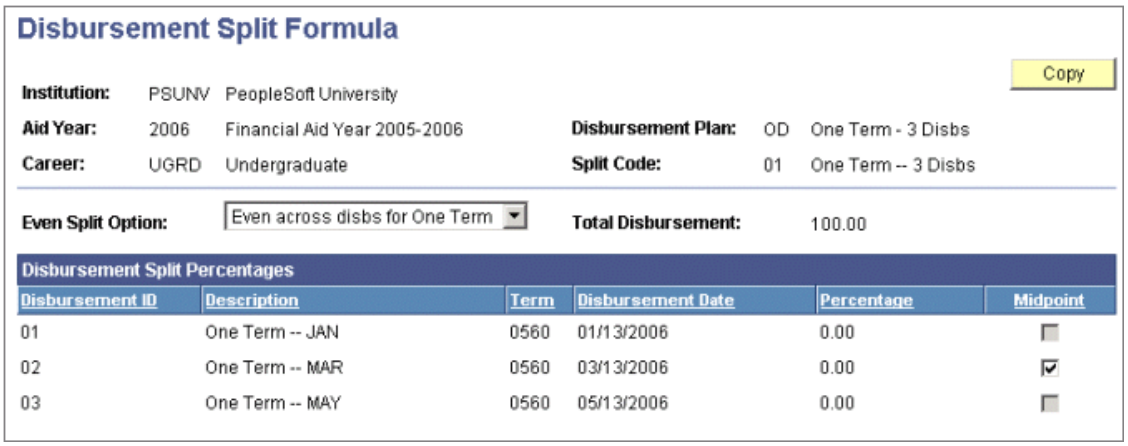
Page Used to Define a Single-Term Loan

Page Name	Definition Name	Navigation	Usage
Disbursement Split Formula	DISB_ID_SPLIT	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Disbursement Split Cd Formula**, and then **Disbursement Split Formula**	Define split code formulas or disbursement percentages for the split codes you created based on the disbursement split code descriptions. This setup provides the specific percentage distribution to each disbursement ID created within a disbursement plan.

Defining a Single-Term DL Loan

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

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



Setup is defined for a single term and must contain two or more disbursement IDs, each containing a unique disbursement date. In addition, the disbursement date for the designated midpoint disbursement ID must be after the midpoint of the term.

Field or Control	Description
Even Split Option	Select the value, *"Even across disbs for One Term"* to define the new split code for a single term loan.
Midpoint	Select to identify the midpoint date.

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> **Note**
>
> All Direct Lending loan item types can support the concept of a disbursement plan and split code scheme that supports multiple disbursement IDs within a term. COD currently supports up to 20 total disbursements per loan application for both Stafford and PLUS loans. To facilitate increases and change processing for one term Direct Loan MPN Financial Aid Item Types, you should set up and define at least four disbursement IDs.

Related Topics

- Defining Split Code Formulas
  Access the Disbursement Split Formula page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Disbursement Split Cd Formula**, and then **Disbursement Split Formula**).

Awarding a Single-Term Loan After the Midpoint

If a single term loan is awarded after the midpoint of the term, you have the option to disburse the entire award amount in a single installment. If you pay the student this way, you do not need to use the *Even Across Disbursements for One Term* disbursement plan option. You can create a disbursement plan with disbursement dates on or after the midpoint and use the existing *Even Among First Disb for Term* option that places the entire disbursement in the first disbursement ID of each term.

Associating Rules with One-Term DL Processing

One-term DL loan processing treatment is identical to the one-term non-DL item type with disbursement protection invoked. If you decrease the loan and all disbursement IDs have been disbursed, the system decreases the award starting with the last disbursement ID and works its way up toward the first ID. Also, if you increase the loan and all of the disbursement IDs have been disbursed, then you must use a different item type to make the increased award.

Reviewing Disbursement ID Scenarios

To compare and illustrate the behavior of one-term DL loan processing versus a non-DL award with disbursement protection invoked versus a non-DL item type with disbursement protection turned, review the following examples.

> **Note**
>
> Although the following examples show a two disbursement plan for direct loan item types and disbursement plans, we are recommending that you create plans with a minimum of four disbursement IDs. This facilitates change increases made to the award after the first disbursement has been made.

Student with a DL Item Type

In the following example, a student is awarded a DL item type with a Disbursement Plan/Split Code (even split for single term) with two IDs.

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Disbursement Plan/Split Code: OT2

ID 01 09/01/2005

ID 02 11/01/2005 Midpoint

1. Award the student 1 Disbursement Plan/Split Code: OT 2,000.00 USD on 08/01/2005

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	0.00
Disbursement 02	500.00 USD	0.00

2. Originate and disburse ID 01 for 500.00 USD on 09/05/2005

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	500.00 USD	0.00

3. Increase the student's award to 1,500.00 USD on 09/10/2005: Because Disbursement 01 is disbursed, the residual increase in the award amount goes toward the midpoint disbursement ID (Disbursement 02).

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	1,000.00 USD	0.00

4. Originate and disburse ID 02 for 1,000.00 USD on 10/20/2005.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	1,000.00	1,000.00 USD

5. Decrease the student's award to 900.00 USD on 10/25/2005. The system repackages and adjusts Disbursement 02 downward from 1,000.00 USD to 400.00 USD to total the 900.00 USD award.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	400.00 USD	1,000.00 USD

6. You must run DL origination as well as authorization/disbursement to reverse the 600.00 USD adjustment so that it reflects the revised Disbursement 02 ID amount of 400.00 USD.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	400.00 USD	400.00 USD

7. Increase the award to 1,100.00 USD on 11/10/2005. Because all of the split IDs have been fully disbursed, you should get an award message requesting that you use another item type for the increase.

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Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	400.00 USD	400.00 USD

8. Decrease the award to 800.00 on 11/15/2005. The system repackages and adjusts Disbursement 02 ID downward from 400.00 USD to 300.00 USD to total the 800.00 USD award.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	300.00 USD	400.00 USD

9. You must run DL origination and authorization/disbursement to reverse the 100.00 USD adjustment so that it reflects the revised Disbursement 02 ID amount of 300.00 USD.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	300.00 USD	300.00 USD

Student with a Non-DL Item Type with Disbursement Protection Turned On

In the following example, a student is awarded a non-DL item type with disbursement protection turned on at the item type level and with a Disbursement Plan/Split code (Even Split for Single Term) with two IDs.

Disbursement Plan/Split Code: OT2

ID 01 09/01/2005

ID 02 11/01/2005 Midpoint

1. Award the student 1,000.00 USD on 08/01/2005.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	0.00
Disbursement 02	500.00 USD	0.00

2. Originate and disburse ID 01 for 500.00 USD on 09/05/2005.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	500.00 USD	0.00

3. Increase the student's award to 1,500.00 USD on 09/10/2005: Because Disbursement 01 is disbursed, the residual increase in the award amount goes toward the midpoint disbursement ID (Disbursement 02).

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	1,000.00 USD	0.00

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4. Disburse ID 02 for 1,000.00 USD on 10/20/2005.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	1,000.00 USD	1,000.00 USD

5. Decrease the student's award to 900.00 USD on 10/25/2005. The system repackages and adjusts Disbursement 02 downward from 1,000.00 USD to 400.00 USD to total the 900.00 USD award.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	400.00 USD	1,000.00 USD

6. You must run authorization/disbursement to reverse the 600.00 USD adjustment so that it reflects the revised Disbursement 02 ID amount of 400.00 USD.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	400.00 USD	400.00 USD

7. Increase the award to 1,100.00 USD on 11/10/2005. Because all of the split IDs have been fully disbursed, you should get an award message requesting that you use another item type for the increase.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	400.00 USD	400.00 USD

8. Decrease the award to 800.00 on 11/15/2005. The system repackages and adjusts Disbursement 02 ID downward from 400.00 USD to 300.00 USD to total the 800.00 USD award.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	300.00 USD	400.00 USD

9. You must run authorization/disbursement to reverse the 100.00 USD adjustment so that it reflects the revised Disbursement 02 ID amount of 300.00 USD.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	300.00 USD	300.00 USD

Student with a Non-DL Item Type with Disbursement Protection Turned Off

In the following example, a student is awarded a non-DL item type with disbursement protection turned off at the item type level and with a Disbursement Plan Split Code (Even Split for Single Term) with two IDs.

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Disbursement Plan/Split Code: OT2

ID 01 09/01/2005

ID 02 11/01/2005 Midpoint

1. Award the student 1,000.00 USD on 08/01/2005.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	0.00
Disbursement 02	500.00 USD	0.00

2. Disburse ID 01 for 500.00 USD on 09/05/2005.

Split	Awarded	Disbursed
Disbursement 01	500.00 USD	500.00 USD
Disbursement 02	500.00 USD	0.00

3. Increase the student's award to 1,500.00 USD on 09/10/2005: Because disbursement protection is off, the system recasts the award across all of the disbursement IDs, both disbursed and undisbursed.

Split	Awarded	Disbursed
Disbursement 01	750.00 USD	500.00 USD
Disbursement 02	750.00 USD	0.00

4. Re-disburse Disbursement ID 01 for the residual 250.00 USD and disburse Disbursement ID 02 for 750.00 USD on 10/20/2005.

Split	Awarded	Disbursed
Disbursement 01	750.00 USD	750.00 USD
Disbursement 02	750.00 USD	750.00 USD

5. Decrease the student's award to 900.00 USD on 10/25/2005. Because disbursement protection is off, the system recasts the award across both disbursement IDs that are disbursed, thereby adjusting Disbursement 01 ID downward from 750.00 USD to 450.00 USD and adjusting Disbursement 02 ID downward from 750.00 USD to 450.00 USD to total the 900.00 USD award.

Split	Awarded	Disbursed
Disbursement 01	450.00 USD	750.00 USD
Disbursement 02	450.00 USD	750.00 USD

6. You must run authorization/disbursement to reverse the 300.00 USD adjustments each from Disbursement ID 01 and Disbursement ID 02 (totaling the 600.00 USD decrease) so that it reflects the revised Disbursement 01 ID amount of 450.00 USD and Disbursement 02 ID amount of 450.00 USD.

Split	Awarded	Disbursed
Disbursement 01	450.00 USD	450.00 USD

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Split	Awarded	Disbursed
Disbursement 02	450.00 USD	450.00 USD

7. Increase the award to 1,100.00 USD on 11/10/2005. Because disbursement protection is off, the system recasts the award across both disbursement IDs that are disbursed, thereby adjusting Disbursement 01 ID upward from 450.00 USD to 550.00 USD and adjusting Disbursement 02 ID upward from 450.00 USD to 550.00 to total the 1,100.00 award.

Split	Awarded	Disbursed
Disbursement 01	550.00 USD	450.00 USD
Disbursement 02	550.00 USD	450.00 USD

8. Re-disburse Disbursement ID 01 for the residual 100.00 USD and Disbursement ID 02 for 100.00 USD, totaling 550.00 USD each (or 1,100.00 USD total disbursements) on 11/15/2005.

Split	Awarded	Disbursed
Disbursement 01	550.00 USD	550.00 USD
Disbursement 02	550.00 USD	550.00 USD

9. Decrease the award to 800.00 USD on 11/15/2005. Because disbursement protection is off, the system recasts the award across both disbursement IDs that are disbursed, thereby adjusting Disbursement 01 ID downward from 550.00 USD to 400.00 USD and adjusting Disbursement 02 ID downward from 550.00 USD to 400.00 to total the 800.00 USD award.

Split	Awarded	Disbursed
Disbursement 01	400.00 USD	550.00 USD
Disbursement 02	400.00 USD	550.00 USD

10. You must run authorization/disbursements to reverse the 300.00 USD adjustment so that it reflects the revised Disbursement 01 ID amount of 400.00 USD and the revised Disbursement 02 ID amount of 400.00 USD.

Split	Awarded	Disbursed
Disbursement 01	400.00 USD	400.00 USD
Disbursement 02	400.00 USD	400.00 USD

Managing Origination from Two-Term Loan to One-Term Loan

Packaging allows for a new disbursement plan option to support DL one-term loans. There are no changes to the Direct Lending process if you choose this new disbursement plan option. However, if you want to change an existing DL loan from a two-term loan to a one-term loan before transmitting the loan, you must first cancel the originated two-term loan using packaging and run DL origination with the adjustment check box selected. Then using packaging, insert a new row, award a new DL item type, use a disbursement plan and split code that reflects the new even split option for one term, and rerun origination with loan adjustments turned on.

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Related Topics

- Reviewing One-Term DL Loan Functionality
  This section provides an overview of one-term DL loan functionality and discusses how to:

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34

Reviewing Awards

Common Elements Used in Reviewing Awards

Field or Control	Description
Accepted	Displays the award amount accepted by the student.
Authorized	Displays the amount authorized for disbursement to the student.
Disbursed	Displays the amount disbursed to the student.
Disbursement ID	Displays the disbursement ID associated with this award amount.
Disbursement Plan	Displays the disbursement plan associated with the award.
Item Type	Displays the financial aid item type of the award.
Offered	Displays the award amount offered to the student.
* = **Expired**	An asterisk next to a net award amount indicates that the amount can no longer be applied as anticipated aid because it has expired. These awards no longer show as anticipated aid in PeopleSoft Student Financials.

Reviewing Award Activity

As financial aid is packaged, adjusted, and disbursed, all activity associated with those actions is recorded. Use the Award Activity page to review changes to a student's financial aid package.

This section discusses how to review FA Term data.

Pages Used to Review Award Activity

Page Name	Definition Name	Navigation	Usage
Award Activity	STDNT_AWRD_ACTV	**Financial Aid**, and then **Awards**, and then **View Award Activity**, and then **Award Activity**	Review changes to a student's award by financial aid item type.

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Page Name	Definition Name	Navigation	Usage
Award Detail	STDNT_AWD_ACTV_DET	Click the **Award Detail** link on the Award Activity page.	View more information about the student's award and the action reason, as well as cost of attendance information.
FA Term Data	STDNT_ACTV_TRM_SEC	Click the **Term Detail** button on the **Award Detail** page.	Review the FA Term data that is used to award the financial aid item type to the student.

Reviewing FA Term Data

Access the FA Term Data page (click the **Term Detail** button on the **Award Detail** page).

Field or Control	Description
Academic Year	Displays the academic year associated with the term.
Total Units	Displays the total number of units that the student is taking for the term.
Pell Term COA (Pell term cost of attendance)	Displays the term-based Pell COA by career.

The other fields on this page are the same as those on the Term Summary page.

Related Topics

- Viewing Term Summary Information
  Access the Term Summary page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Assign Awards to a Student**, and then **Term Summary**).

Reviewing Aggregate Aid

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

- Review aggregate aid summary.
- Review aggregate aid by school.
- View aggregate detail.
- Review aggregate program summary.

Related Topics

- Managing Aggregate Aid
  To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete history when determining aid eligibility. Financial Aid provides several options and methods to maintain aggregate aid to ensure that Packaging adheres to eligibility requirements and award limits.

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Understanding Aggregate Aid Review

The aggregate aid summary components display information regarding defined aggregate area limit amounts, used amounts against the limits, and remaining eligibility. Two aggregate aid summary components are available: View Aggregate Aid and View Aggregate Program Summary. Each is based on aggregate areas that you set up in the system. You can define aggregate area rules for each academic grade level, for undergraduate and graduate designation, or as lifetime funding limits. An aggregate area can be attached to one or many financial aid item types or awards. Information maintained in the aggregate aid tables helps determine a student's annual and lifetime limits during the Awarding and Packaging processes. The aggregate aid summary components are updated by the Awarding and Packaging processes. You can also update individual aggregate data using the Update Incoming Aggregate Aid component.

Another source of aggregate aid history for the federal Stafford subsidized, Stafford unsubsidized, Perkins, Pell, and (Federal) Student Education Opportunity Grant (SEOG) aid programs is maintained within the National Student Loan Data System (NSLDS) database. NSLDS data is loaded into the system during the Institutional Student Information Records (ISIR) Load routine as well as from Transfer Student Monitoring and Financial Aid History requests. NSLDS data that is loaded into the system can be pushed to the aggregate aid tables to be used during the Awarding and Packaging processes. An aggregate source of NSLDS must be set in the system to direct the Awarding and Packaging processes to use the NSLDS totals instead of the standard aggregate aid totals.

In addition to using aggregates to keep track of federal funds, you can establish aggregate areas and aggregate limits for any other award sources in the system. You should establish aggregate limits for all federal funds, such as Pell, Stafford, and SEOG. If aggregate limits are not established, the Packaging and Awarding processes may award students more than the federally or institutionally established annual and lifetime limits.

Pages Used to Review Aggregate Aid

Page Name	Definition Name	Navigation	Usage
Aggregate Summary	STDNT_AGGR_AWDS	**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **View Aggregate Aid**, and then **Aggregate Summary**	Review aggregate aid summary for a student.
Aggregates by School	STDNT_AGGR_SCHL	**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **View Aggregate Aid**, and then **Aggregates by School**	Review aggregate aid by school. Check whether aggregate aid from a particular institution has been entered or whether the student has received aggregate aid from more than on institution.
Aggregate Detail	AGGR_SCHL_SEC	Click the **Detail** link on the Aggregates by School page.	View additional details of each institution's aggregate aid award to the student, including loan information.

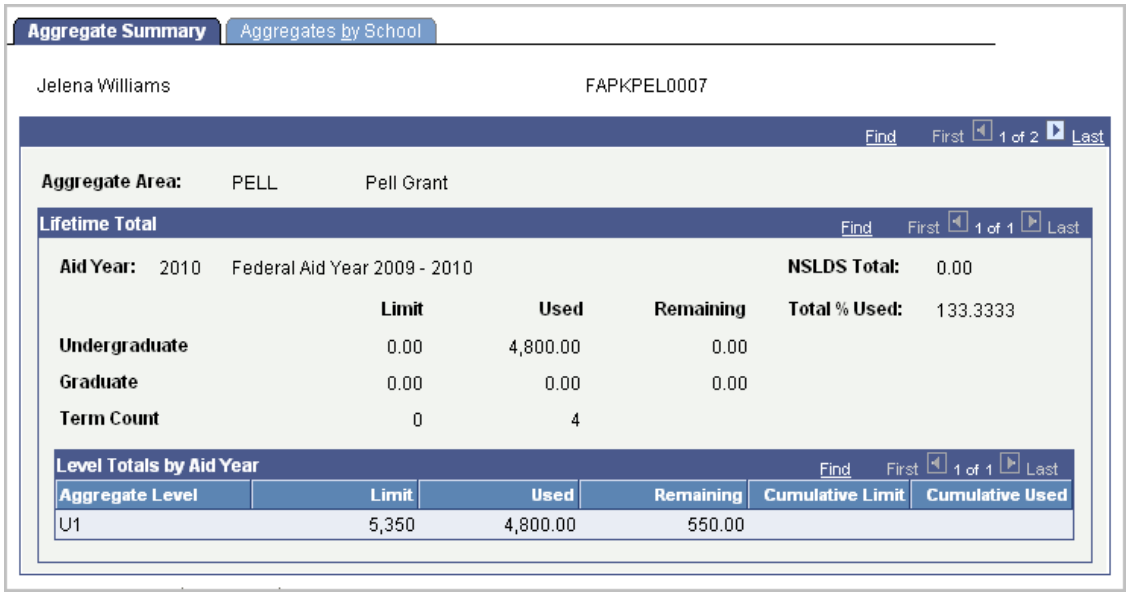
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Page Name	Definition Name	Navigation	Usage
Aggregate Program Summary	SFA_STU_AGGR_PROG	**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **View Aggregate Program Summary**, and then **Aggregate Program Summary**	View aggregate aid history for a student for a corresponding aggregate program.

Reviewing Aggregate Aid Summary

Access the Aggregate Summary page (**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **View Aggregate Aid**, and then **Aggregate Summary**).

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



Lifetime Total

Field or Control	Description
Aid Year	Indicates the aid year that corresponds to the displayed information. Use the scroll arrows to view aggregate aid made in other aid years.
NSLDS Total (National Student Loan Data System total)	Indicates the NSLDS total that has been loaded and pushed from the NSLDS tables.
Total % Used	Displays the sum of **Percent Scheduled Used** and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 200.0.

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Field or Control	Description
Undergrad Lifetime (undergraduate lifetime)	Information in this row is for the student's undergraduate NSLDS loan years (U0-U5) and associated awards.
Graduate Lifetime	Information in this row is for the student's graduate NSLDS loan years (G1–G4, P1–P4) and associated awards. The student's undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits. *(Cumulative):* The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. *(Distinct):* The undergraduate and graduate limits are tracked separately. With the One Big Beautiful Bill (OB3) implementation, if the student is awarded under OB3 loan aggregates the information will be distinct to their graduate career.
Professional Lifetime	With the OB3 implementation, information in this row is for the student's professional NSLDS loan years and associated awards.
Parent PLUS (UG)	With the OB3 implementation, information in this row is for Parent PLUS awarded to the undergraduate student that is tied to an aggregate area for Direct loan Parent PLUS.
Lifetime Terms	If a limit applies to the number of terms that a student can receive this type of aid, in addition to or separate from a dollar amount limit, this row displays the limit (if any) and the number of terms for which the student has received the award. The Packaging routine does not enforce these lifetime term limits; these fields are for informational purposes only.
Limit	The lifetime maximum aggregate amount (or number of terms) the student can receive for this aggregate area/aid.
Used	The amount of aid or number of terms that the student has received this type of aggregate aid.
Remaining	Indicates unused lifetime aggregate eligibility (amount or terms) that the student can receive.

Level Totals by Aid Year

Field or Control	Description
Aggregate Level	Displays the student's aggregate level for the displayed year. Aggregate level data is posted as a result of Awarding and Packaging processing as well as data entered in the Update Incoming Aggregate Aid component.
Limit	Displays the annual maximum aggregate amount that the student can receive for this aggregate level.

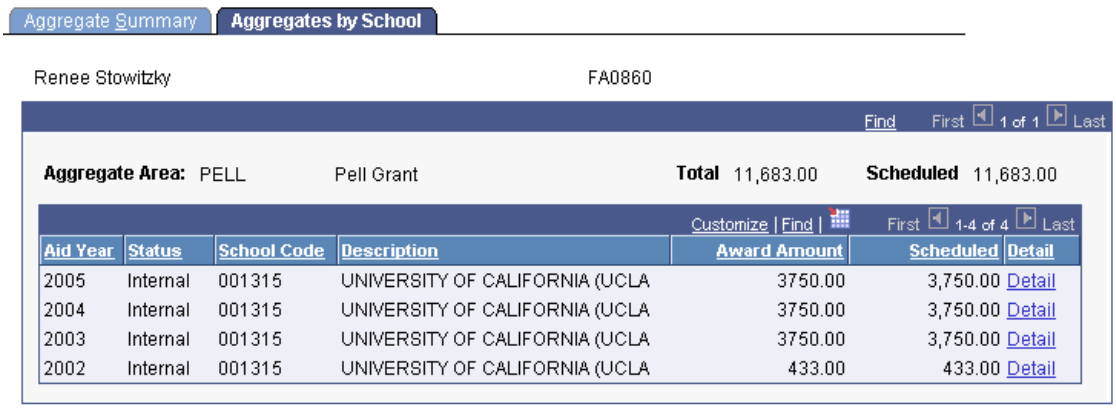
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Field or Control	Description
Used	Displays the amount that the student has received.
Remaining	Displays the unused annual aggregate eligibility that the student can receive.
Cumulative Limit	Displays the maximum cumulative amount that the student can receive for this academic level. This is an optional limitation that can be defined on the corresponding aggregate area.
Cumulative Used	Displays the unused cumulative level limit for which the student is eligible.
Dependency	The student's dependency status appears after any awarding or packaging activity has occurred for this aggregate area as of the aid year.
PLUS Override (Parent Loan for Undergraduate Students override)	The student's PLUS override status maintained on the STDNT_AID_PACKAGE component appears for all aggregate areas that correspond to either the Federal Family Educational Loan Program (FFELP) or Direct Loan programs. PLUS Override status appears after any awarding or packaging activity has occurred.

Reviewing Aggregate Aid by School

Access the Aggregates by School page (**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **View Aggregate Aid**, and then **Aggregates by School**).

This example illustrates the fields and controls on the Aggregates by School page. You can find definitions for the fields and controls later on this page.



Information for this page is viewed by aggregate area, such as Stafford or Pell. Use the scroll arrows to view other aggregate areas.

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Field or Control	Description
Total	Displays the total lifetime amount awarded by all schools for this student for this aggregate area.
Scheduled	Displays the aggregate Pell amount award to the student. For non-Pell aggregate areas, this field remains at zero.
Aid Year	Displays the aid year in which the aggregate aid was awarded to the student. Use the scroll arrows to view additional aid years.
Status	Indicates whether your institution or another institution awarded the aggregate aid. Values are: *Internal:* The aggregate aid was awarded by your institution by means of the award entry pages. *Imported:* The aggregate aid was awarded at another institution and has been added to the system by means of the Aggregate Aid Data page.
School Code	Displays the code and name of the institution where the aggregate aid was awarded.
Award Amount	Displays the amount of aggregate aid provided by each school.
Scheduled	Displays the aggregate Pell amount award to the student for the corresponding aid year. For non-Pell aggregate areas, this field remains at zero.
Detail	Click this link to access the Aggregate Detail page and view detailed information about each school's aggregate aid award.

Viewing Aggregate Detail

Access the Aggregate Detail page (click the **Detail** link on the Aggregates by School page).

The page displays aggregate area, aid year, academic year, school code, and status information about the award from the Aggregates by School page.

Field or Control	Description
Aggregate Level	Displays the student's academic level for which he or she received the aggregate amount.
Expected Award	Displays the aggregate amount offered to the student.
Actual Award	Displays the aggregate amount disbursed to the student.

Aggregate Loan Data

The fields in this group box display loan processing information for loan awards that have at least been originated. However, this functionality is not currently supported, and these fields remain blank.

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Reviewing Aggregate Program Summary

Access the Aggregate Program Summary page (**Financial Aid**, and then **Awards**, and then **Aggregates**, and then **View Aggregate Program Summary**, and then **Aggregate Program Summary**).

Aggregate program limits link aggregate areas together to enable you to combine limits between aggregate areas. The intent is to support the Stafford program, which comprises the subsidized and unsubsidized programs.

Program Totals by Aid Year

Field or Control	Description
Aid Year	Indicates the aid year that corresponds to the displayed information. Use **View All** to view aggregate aid that was made in other aid years.
Undergrad Lifetime (undergraduate lifetime)	Information in this row is for the student's combined undergraduate NSLDS loan years (U0–U5) awards that are associated with the aggregate areas that are linked to this aggregate program.
Graduate Lifetime	Information in this row is for the student's combined graduate NSLDS loan years (G1–G4, P1–P4) awards that are associated with the aggregate areas that are linked to this aggregate program. The student's undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits. With the One Big Beautiful Bill (OB3) implementation, if the student is awarded under OB3 loan aggregates the information will be distinct to their graduate career.
Professional Lifetime	With the OB3 implementation, information in this row is for the student's professional NSLDS loan years and associated awards.
Parent PLUS (UG)	With the OB3 implementation, information in this row is for Parent PLUS awarded to the undergraduate student that is tied to an aggregate area for Direct loan Parent PLUS.

Aggregate Areas for Program

Field or Control	Description
Aggregate Areas for Program	Indicates the aid year that corresponds to the displayed information. Use **View All** to view aggregate area totals in other aid years.
Undergrad Lifetime (undergraduate lifetime)	Information in this row is for the student's undergraduate NSLDS loan years (U0–U5) and associated awards.

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Field or Control	Description
Graduate Lifetime (Cumulative)	Information in this row is for the student's graduate NSLDS loan years (G1–G4, P1–P4) and associated awards. The student's undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits. The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. If the undergraduate amount is 20,000 and the graduate amount is 40,000, then the student cannot receive more than 40,000 for this aggregate area.) When **Distinct** is displayed, the undergraduate and graduate limits are tracked separately. If the undergraduate amount is 20,000 and the graduate amount is 40,000, then the student can receive up to 60,000 for this aggregate area.)
Professional Lifetime	With the OB3 implementation, information in this row is for the student's professional NSLDS loan years and associated awards.
Parent PLUS (UG)	With the OB3 implementation, information in this row is for Parent PLUS awarded to the undergraduate student that is tied to an aggregate area for Direct Loan Parent PLUS.

Reviewing Student Packaging Status by Date

The student's financial aid award package as well as the information used to award a student can change over time. The As Of Status component enables you to view information about a student's ISIR information and award package by a particular date in time. As new ISIR data is loaded, a student's award package may change. Use the pages in the As Of Status component to review changes over time. This can be particularly important for explaining a reduced award to a student or for reviewing changes to student's awards.

This section discusses how to:

- Review ISIR summary information by date.
- Review award summary by date.

Pages Used to Review Student Packaging Status by Date

Page Name	Definition Name	Navigation	Usage
As of ISIR Summary	AS_OF_ISIR_SUMMRY	**Financial Aid**, and then **Awards**, and then **View by Date**, and then **As of ISIR Summary**	Review a student's ISIR summary detail as of a particular date, various database matches, and verification status.

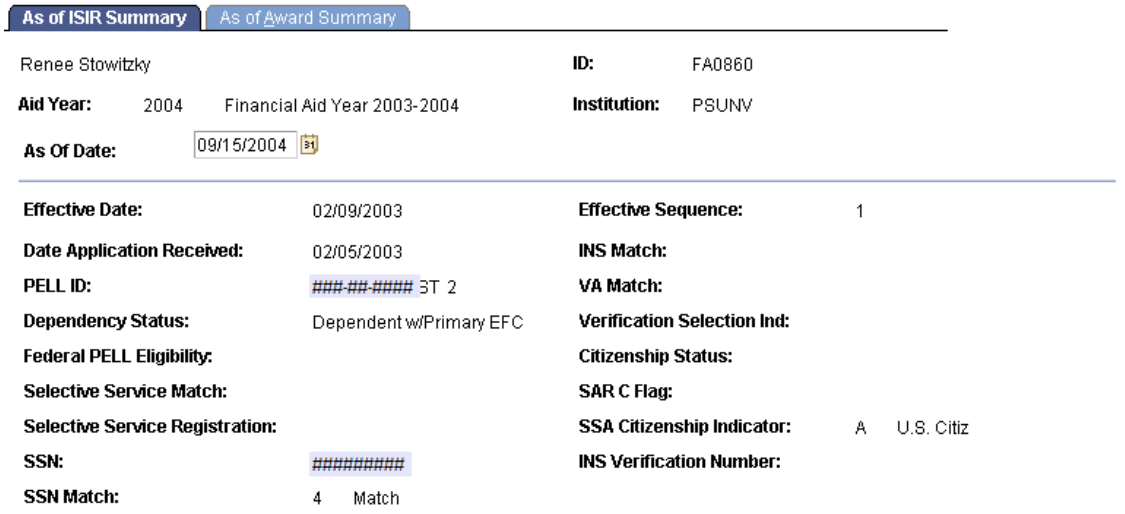
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Page Name	Definition Name	Navigation	Usage
As of Award Summary	AS_OF_AWRD_SUMMRY	**Financial Aid**, and then **Awards**, and then **View by Date**, and then **As of Award Summary**	Review award summary. Review a student's financial aid package as of a particular date in time.

Reviewing ISIR Summary Information by Date

Access the As of ISIR Summary page (**Financial Aid**, and then **Awards**, and then **View by Date**, and then **As of ISIR Summary**).

This example illustrates the fields and controls on the As of ISIR Summary page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
As of Date	Enter the date that you want to review related to the student's ISIR information. When you make an entry, the system displays the data that was used for the student as of the entered date.
Effective Sequence	Displays the number assigned to each effective-dated row that enables you to keep track of multiple rows with the same effective date.

The other fields on this page correspond to those on the ISIR Information Summary page.

Related Topics

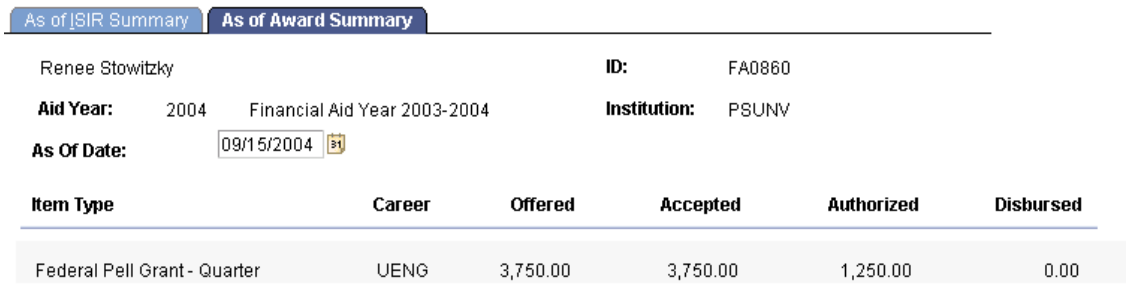
- Reviewing the Packaging Status Summary Page
  Access the Packaging Status Summary page (**Financial Aid**, and then **View Packaging Status Summary**, and then **Packaging Status Summary**).

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Reviewing Award Summary by Date

Access the As of Award Summary page (**Financial Aid**, and then **Awards**, and then **View by Date**, and then **As of Award Summary**).

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



This page displays information for the entire aid year. The information on this page comes from the student award information and the authorization and disbursement processes.

Field or Control	Description
As of Date	Enter the date that you want to review related to the student's award information. When you make an entry, the system displays information about the student's awards as of the entered date.
Item Type	Displays the financial aid item type of the award.
Career	Displays the career associated with the award.

Reviewing Award Summary Information by Category

This section discusses how to review award summary information.

Pages Used to Review Award Summary Information by Category

Page Name	Definition Name	Navigation	Usage
Award Category Totals	STDNT_AWRD_CATG	**Financial Aid**, and then **Awards**, and then **View Award Category Summary**, and then **Award Category Totals**	Review award summary information. View award totals by award category for the entire aid year.

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Page Name	Definition Name	Navigation	Usage
Award Category Detail	STDNT_AWRD_CTG_DET	Click the **Award Detail** link on the Award Category Totals page.	View information about each award included in a category on the Award Category Totals page.

Reviewing Award Summary Information

Access the Award Category Totals page (**Financial Aid**, and then **Awards**, and then **View Award Category Summary**, and then **Award Category Totals**).

Field or Control	Description
Category	Displays the type of financial aid award. An award's category comes from the **Financial Aid Type** field on the FA Item Type 1 page. Each category for which the student has an award is shown.
Award Count	Displays the number of awards of this category awarded to the student.
Offer Total	Displays the total award amount offered for this category.
Accept Total	The total award amount accepted for this category.
Authorized Total	Displays the total amount authorized for disbursement to the student for the category.
Disbursed Total	Displays the total amount disbursed to the student for the category.
Award Detail	Click this link to access the Award Category Detail page and view information about each award included in a category.
Total	Displays the total of all categories for each column.

Reviewing Total Award Summary Information

The Award Summary component enables you to review a student's awards for the entire aid year or for a particular term, and also indicates whether each award has been authorized or disbursed.

This section discusses reviewing an annual award summary.

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Pages Used to Review Total Award Summary Information

Page Name	Definition Name	Navigation	Usage
Award Summary	STDNT_AWRD_INQUIRY	**Financial Aid**, and then **Awards**, and then **View Term Award Summary**, and then **Award Summary**	Review an annual award summary. View a student's awards and the offered, accepted, authorized for disbursement, and disbursed amounts for each award.
Award Detail	AWARD_DETAIL_SEC	Click the **Award Detail** link on the Award Summary page.	View the disbursement plan and split code for an individual award, as well as details about a disbursement ID.
Award Term Summary	STDNT_AWRD_TERM	**Financial Aid**, and then **Awards**, and then **View Term Award Summary**, and then **Award Term Summary**	View a student's awards by term. This is particularly useful when you are viewing awards for different careers for the terms.

Reviewing an Annual Award Summary

Access the Award Summary page (**Financial Aid**, and then **Awards**, and then **View Term Award Summary**, and then **Award Summary**).

The amounts on this page are for the entire aid year. Authorized and disbursed amounts may not be equal to the accepted amount if you have not disbursed all terms.

Field or Control	Description
Award Detail	Click this link to access the Award Detail page and view the disbursement plan and split code for an individual award, as well as details about a disbursement ID.
TOTAL	Displays the totals for the student's entire financial aid package.

Reviewing Anticipated Aid

When each financial aid item type is defined, one of the decisions that you make is whether this aid should be reflected on a student's account in PeopleSoft Student Financials as anticipated aid before the actual disbursement of the aid. The pages that are discussed in this section enable you to view the awards that have been designated as anticipated aid. You can also use these pages to determine whether financial aid awards have been disbursed to students for any term in the aid year.

This section discusses how to:

- Review anticipated aid by term.
- Review anticipated aid by item type.

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Related Topics

- Defining Disbursement and Anticipated Aid
  Access the FA Item Type 3 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 3**).

Pages Used to Review Anticipated Aid

Page Name	Definition Name	Navigation	Usage
Anticipated Aid by Term	ANTICIPTD_AID_SUMM	**Financial Aid**, and then **Awards**, and then **View Anticipated Aid by Term**, and then **Anticipated Aid by Term** **Note:** Applies to CS Financial Aid Anticipated Aid only.	Review the anticipated aid for a student by term.
Anticipated Aid by Item Type	ANTICIPATED_AID	**Financial Aid**, and then **Awards**, and then **View Anticipated Aid Item Type**, and then **Anticipated Aid by Item Type** **Note:** Applies to CS Financial Aid Anticipated Aid only.	Review the anticipated aid for a particular award financial aid item type.

Reviewing Anticipated Aid by Term

Access the Anticipated Aid by Term page (**Financial Aid**, and then **Awards**, and then **View Anticipated Aid by Term**, and then **Anticipated Aid by Term**).

Only financial aid item types that are designated as anticipated aid are displayed on this page. Use the scroll arrows to view additional anticipated aid awards for the term.

Field or Control	Description
Disbursement Apply Date	Displays the date on which the award can be applied to the student's account as anticipated aid. This date is based on the disbursement date of the disbursement ID.
Disbursement Expire Date	Displays the last date that the award is applied as anticipated aid to the student's account. When this date has passed, the award does not count as anticipated aid for the term unless you change the expire date by modifying the **Anticip Aid Expiration Days** (anticipated aid expiration days) field on the FA Item Type 3 page.
Net Award Amount	Displays the net amount to be disbursed to the student for the term for this financial aid item type. If this amount is zero, the award has been disbursed.

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Field or Control	Description
Total Active Anticipated Aid	Displays the total amount of anticipated aid that is still active for the student for the term. This is the sum of the net award amounts for any financial aid item type that has not expired.

Reviewing Anticipated Aid by Item Type

Access the Anticipated Aid by Item Type page (**Financial Aid**, and then **Awards**, and then **View Anticipated Aid Item Type**, and then **Anticipated Aid by Item Type**).

Only financial aid item types that are designated as anticipated aid are displayed on this page.

Field or Control	Description
Show Active Aid Only	Select this check box to view active anticipated aid awards only. Clear to view all anticipated aid awards (active and expired). When you first access this page, this check box is cleared.
Career	Displays the career that is associated with this disbursement plan. If the student is a multicareer student, use the scroll arrows to view other disbursement plan and career combinations for this financial aid item type.
Disbursement ID	Displays the individual disbursement ID for this anticipated aid award. The page displays award information by disbursement ID, instead of by term or aid year. Use the scroll arrows to view other disbursement IDs for this financial aid item type.
As of Date/Time	Displays the date and time when the anticipated aid was last updated. As changes are made, new rows are added with different dates and times. Use the scroll arrows to view additional changes to this award.
Apply Dt (apply date)	Displays the date on which the award can be applied to the student's account as anticipated aid. This date is based on the disbursement date of the disbursement ID.
Expire Dt (expire date)	Displays the last date that the award is applied as anticipated aid to the student's account. When this date has passed, the award does not count as anticipated aid for the term unless you change the expire date by modifying the **Anticip Aid Expiration Days** field on the FA Item Type 3 page.
Net Award	Displays the net amount to be disbursed to the student for the term for this financial aid item type. If this amount is zero, the award has been disbursed.

Expiring Anticipated Aid

This section discusses how to:

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- Expire Anticipate Aid for a single student.
- Expire Anticipated Aid in batch.

Pages Used to Expire Anticipated Aid

Page Name	Definition Name	Navigation	Usage
Expire Anticipated Aid	ANTICIPTD_AID_EDIT	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Expire Anticipated Aid**, and then **Expire Anticipated Aid** **Note:** Applies to CS Financial Aid Anticipated Aid only.	Expire anticipated aid for any financial aid item type displayed. Also view the student's anticipated aid for a particular term.
Expire Anticipated Aid in Batch	SFA_RUN_XANTAID	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Batch Expire Anticipated Aid**, and then **Expire Anticipated Aid in Batch**	In batch, expire all anticipated aid for an aid year and term, expire anticipated aid by financial aid item type, aid year, and term, or reset the expiration date for unexpired anticipated aid by financial aid item type, aid year, and term.

Expiring Anticipated Aid

Access the Expire Anticipated Aid page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Expire Anticipated Aid**, and then **Expire Anticipated Aid**).

Field or Control	Description
Expire Anticipated Aid	Click this button to set the expire date to the current date. This expires the anticipated aid for the financial aid item type. You must exit the page and access it again to have the expired asterisk appear next to the **Net Award** amount. After you click the button and exit the page and then access it again, this button is no longer available for this financial aid item type.

The other fields on this page correspond to those on the Anticipated Aid by Term page.

Related Topics

- Reviewing Anticipated Aid
  When each financial aid item type is defined, one of the decisions that you make is whether this aid should be reflected on a student's account in PeopleSoft Student Financials as anticipated aid before the actual disbursement of the aid. The pages that are discussed in this section enable you to view the awards that have been designated as anticipated aid. You can also use these pages to determine whether financial aid awards have been disbursed to students for any term in the aid year.

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Expiring Anticipated Aid in Batch

Access the Expire Anticipated Aid in Batch page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Batch Expire Anticipated Aid**, and then **Expire Anticipated Aid in Batch**).

Field or Control	Description
Selection Tool	Select one option. • PS Query: Specify the BIND record SFA_XANTAD_BIND as part of your query. • Equation Engine: Specify SFA_XANTAD_BIND and SFA_XANTAD_TRGT for the BIND and TARGET records, respectively, as part of your equation. Specify 'Batch Expire Anticipated Aid' as the Equation's Application Prompt ID.
Expire Options	Select one option. • **Expire all anticipated aid:** Select this option to expire all anticipated aid for the selected **Aid Year** and **Term**. • **Expire by Item Type:** Select this option to expire all anticipated aid for a single financial aid **Item Type** for the selected **Aid Year** and **Term**. Multiple Item Types can be selected for expiration. • **Reset Expiration Date:** Select this option to reset the Expiration Date for all anticipated aid for a single financial aid **Item Type** for the selected **Aid Year** and **Term**. You can only expire awards where the **Expire Dt** is greater or equal to the current date. In other words, you can only expire unexpired awards and not awards that have already expired.

Related Topics

- Reviewing Anticipated Aid
  When each financial aid item type is defined, one of the decisions that you make is whether this aid should be reflected on a student's account in PeopleSoft Student Financials as anticipated aid before the actual disbursement of the aid. The pages that are discussed in this section enable you to view the awards that have been designated as anticipated aid. You can also use these pages to determine whether financial aid awards have been disbursed to students for any term in the aid year.
- Campus Community Fundamentals: Using the Population Selection Process

Reviewing Overaward Amounts

A report is available to help you identify whether any students are in an overaward situation and to review disbursement information for students who are in an overaward situation. An overaward situation occurs when the student receives financial aid for an award period that

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exceeds the student's COA or need for that award period. This report lists students who have overaward amounts and contains information about their need and disbursements.

This section discusses how to generate the Overaward Report.

Page Used to Review Overaward Amounts

Page Name	Definition Name	Navigation	Usage
Overaward Report	RUN_CNTL_FA922_RPT	**Financial Aid**, and then **Awards**, and then **Generate Overaward Report**, and then **Overaward Report**	Generate the Overaward Report.

Generating the Overaward Report

Access the Overaward Report page (**Financial Aid**, and then **Awards**, and then **Generate Overaward Report**, and then **Overaward Report**).

Field or Control	Description
Award Period	Select the award period for which you want to view overaward amounts. Select *A – Academic* for the academic year or *N – Non-Standard* for summer and other terms that are not designated as academic terms.
Pkg Method (packaging method)	Indicate which packaging method should be used to determine whether a student has an overaward. Select *FM – Federal Methodology* to display overawards that exceed FM need or FM COA according to federal regulations, *IM – Institutional Methodology* to display overawards that exceed IM need or IM COA according to your institution's rules, or leave the field blank to include both FM and IM overawards.

> **Note**
>
> The Overaward Report is a core report. If you want to use additional criteria when running this report, you can configure the report to suit your needs.

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35

Notifying Students of Financial Aid Awards

Selecting Students and Creating a FAN Extract File

> **Important**
>
> Mass Change is a deprecated product. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

This section provides an overview of FAN processing and discusses how to:

- Assign FAN communications manually.
- Assign FAN communications using mass change.
- Review students selected for award notification.
- Select students to include in the extract file.
- Create the FAN extract file and produce the FAN letter.

Understanding FAN Processing

After packaging students, use the FAN to notify students of their financial aid awards. The FAN includes the name of each award, the amount awarded to the student, and any messages that you designated for a particular financial aid item type. When you define financial aid item types, you select award messages to print on the FAN and specify whether the award should be classified as an award item, other resource, or a custom format when printed on the FAN.

To create a FAN:

1. Assign communications to students.

   You can assign a FAN communication to an individual student manually, or you can use Mass Change to assign a FAN communication to a group of students.
2. Select a group of students for which to create an extract file.
3. Create the extract file.

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4. Merge the extract file with your selected word processing software to create the actual FAN letter.

Some particulars for FAN processing:

- Aid year is a merge field to enable printing a FAN for multiple aid years.
- Financial aid item types that are designated to be printed as *Other Resources* are summed together and displayed on the FAN as one item in the Eligibility section of the letter. To provide a breakdown of the *Other Resources* total, each financial aid item type designated to print as *Other Resources* appears as a line item in the Financial Aid Offer section of the letter with term amounts and total award amount shown. The message code of *OTHR* identifies each financial aid item type designated to be printed as *Other Resources.* Awards with the *OTHR* message code are not included in the total financial aid offer amount displayed.
- Adjustment reason codes are included in the data extract process so they appear when the FAN is printed. Adjustment reason codes appear only if there has been a change to an award.

Pages Used to Select Students and Create a FAN Extract File

Page Name	Definition Name	Navigation	Usage
Award Notification Selection	FAN_SEL_LET_MC	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **View Mass Change Selection**, and then **Award Notification Selection**	Review students selected to receive a financial aid notification letter during the FAN-Select Letter Mass Change process.
Award Notification Selection (process)	RUNCTL_FAN_SEL	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Select Award Letter Data**, and then **Award Notification Selection**	Select a student or group of students to include in extract file used to generate FAN letters. Choose the address and name to be used on the FAN letter.
Award Letter Data Extract	RUNCTL_FAN_EXTRACT	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Create Award Letter Data File**, and then **Award Letter Data Extract**	Create a FAN extract file.
Award Notification Summary	STDNT_FAN_ATRBT	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Summary**, and then **Award Notification Summary**	Review award letters for a student.
Summary of Data Printed on FAN	STDNT_FAN_DATA	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **View Award Letter Data**	View the information that was printed on the student's FAN letter.

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Page Name	Definition Name	Navigation	Usage
Budget Items	STDNT_FAN_BDGT_SEC	Click the **Budget Detail** link on the Summary of Data Printed on FAN page.	View the budget categories and amounts that constitute the student's cost of attendance.
Term Award Data	STDNT_FAN_AWRD_SEC	Click the **Award Detail** link on the Summary of Data Printed on FAN page.	View the student's financial aid package by term.

Assigning FAN Communications Manually

Click the Communication button to access the Communication Management page and assign a FAN communication for an individual student. This button is found on several pages including the:

- Communication Summary page.

  You can use this page to see if a FAN communication has already been assigned to this student.

  See Campus Community Fundamentals: Reviewing a Summary of Communications.
- Financial Aid Status page.

  See Reviewing the Student's Packaging Status.

Assigning FAN Communications Using Mass Change

To assign communications using Mass Change:

1. Update the Mass Change Select Template in the Mass Change Definition component **(Campus Community**, and then **Communications**, and then **Mass Change - Communications**, and then **Mass Change Definition)** with the criteria that you want to use to select students.
   a. Select *FAN-Select Letter* as the **Mass Change Definition.**
   b. Select the Campus Solutions page, and enter or update the fields as necessary.
   c. Select the Criteria and Defaults page and use the SQL Statement scroll arrows to find **Execution Seq** *2,* which has a **Description** of *Select Application Criteria.*
   d. Update the **Field** and **Field Value** entries that you want to use to select students, leaving blank those fields that you are not using.
   e. Select the Generate SQL page, and click the **Mass Change Clear Switch** button.
   f. Click the **Mass Change Generate SQL Swch** (mass change generate SQL switch) button.
   g. Click the **Count** button to make sure that the count (number of students selected) is at least greater than zero.
   h. Click the **Save** button, and click **OK** for any warning messages that appear.
2. Run the Mass Change using the Run Mass Change page.
   a. Select the **Execute Single Mass Change** option in the **Mass Change Run Type** group box.

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b. In the **Mass Change Definition** field, select *FAN-Select Letter.*

3. (Optional) Review and edit the selected students on the Award Notification Selection page.
4. Update the Mass Change Update Template in the Mass Change Definition component **(Campus Community**, and then **Communications**, and then **Mass Change—Communications**, and then **Mass Change Definition).**
   a. Select *FAN-Update Comm Table* as the **Mass Change Definition.**
   b. Select the Campus Solutions page, and enter or update the fields as necessary.
   c. Select the Generate SQL page, and click the **Mass Change Clear Switch** button.
   d. Click the **Mass Change Generate SQL Swch** (mass change generate SQL switch) button.
   e. Click the **Count** button to make sure that the count (number of students selected) is at least greater than zero.
   f. Click the **Save** button, and click **OK** for any warning messages that appear.
5. Run the 3C Engine **(Campus Community**, and then **Communications**, and then **Process**, and then **3C Engine).**
   a. On the Trigger Table page, select the **Mass Change** option in the **Process 3Cs** group box.
   b. Select the Mass Change page.
   c. Enter *FAN-Create-Communication* in the **Mass Change Group ID** field.
   d. Click the **Run** button.

Related Topics

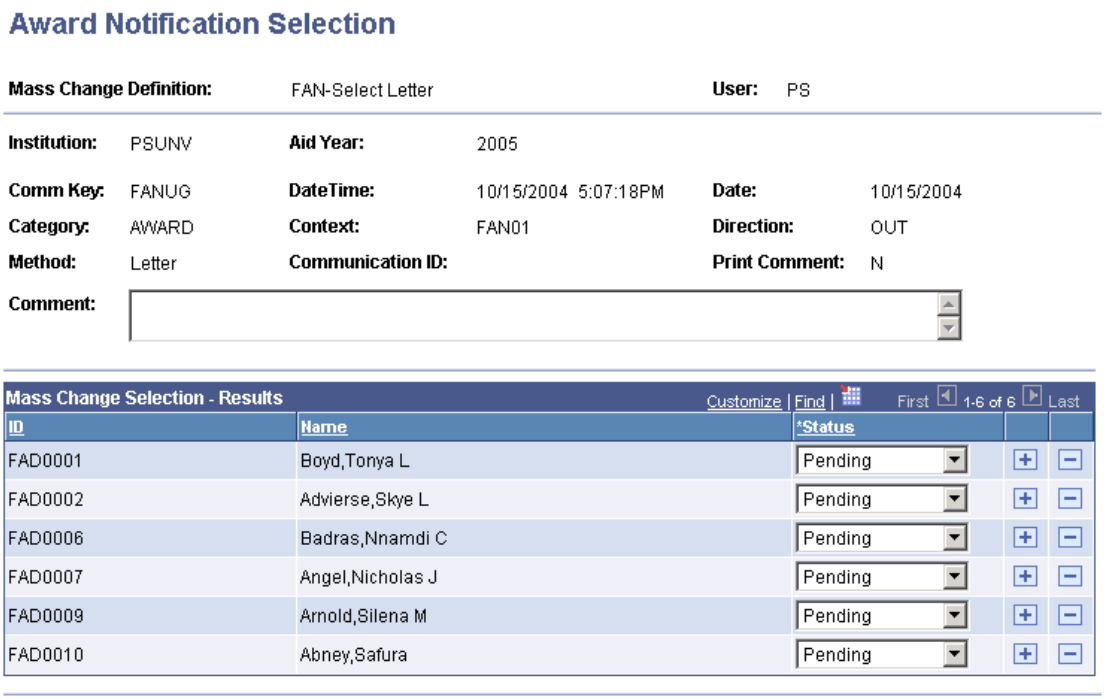
- Assigning FAN Communications Using Mass Change
  To assign communications using Mass Change:

Reviewing Students Selected for Award Notification

Access the Award Notification Selection page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **View Mass Change Selection**, and then **Award Notification Selection**).

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

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The **Mass Change Selection - Results** group box lists the students who are selected to receive a FAN by the mass change process.

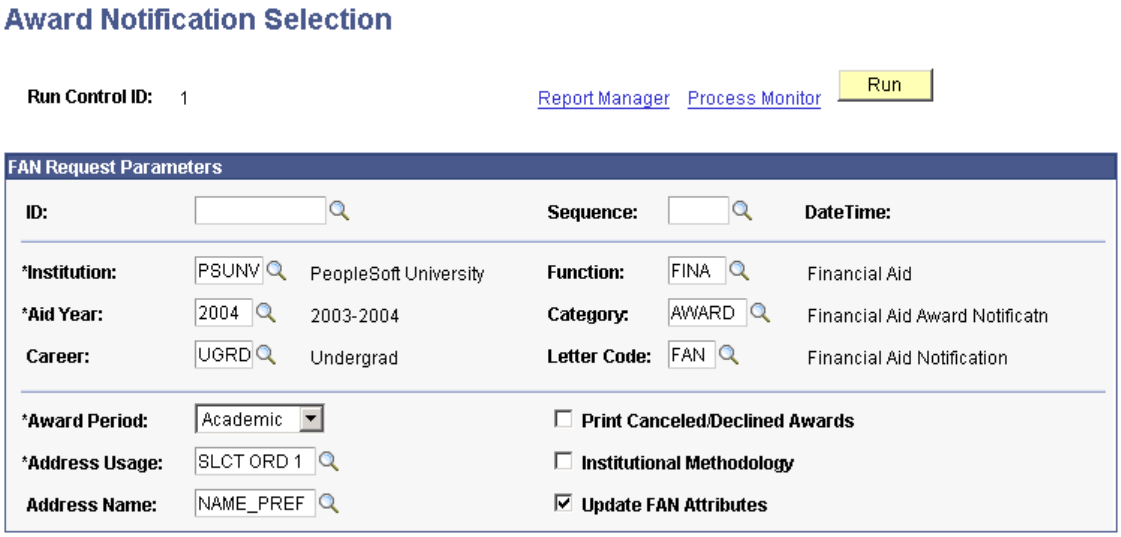
Field or Control	Description
Status	Specifies the current status of the student's FAN communication, and determines whether the student is selected for inclusion in the extract file. As long as the student does not have a status of *Cancel*, the student is selected for inclusion in the extract file. To prevent a student from receiving a FAN letter, you can either change the student's status to *Cancel* or you can delete the student's row. *Cancel:* Select this value to prevent the student from having a FAN communication assigned. *Pending:* The student has been selected to have a FAN communication assigned, but it has not yet been assigned (the 3C Engine still needs to be run). *Successful:* Indicates that a FAN communication has been successfully assigned to the student.

Selecting Students to Include in the Extract File

Access the Award Notification Selection (process) page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Select Award Letter Data**, and then **Award Notification Selection**).

This example illustrates the fields and controls on the Award Notification Selection (process) page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
ID	To print a FAN letter for only one student, select the student's ID number in this field. Only students who have been assigned a communication with a function of *FINA* are available for selection. If you want to select a group of students, leave this field empty.
Sequence	If you want to print a FAN letter for a group of students, leave this field blank. Select a specific communication for the student. If you leave this field blank, the most recent communication is used. When you select a sequence number, the system populates the **Institution, Function, Aid Year, Category,** and **Letter Code** fields.
Institution	If you are selecting a group of students for which to run this process, select the institution that the students attend. When you complete this field, the system automatically populates the **Function** and **Aid Year** fields. If you selected an ID, this field is already populated.
Function	The administrative function of the Communication. *FINA* is the default.
Category	Select *AWARD* for the FAN letter.

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Field or Control	Description
Career	If you select an ID and a sequence, you can select a career for the student. If you select a career, only awards for that career are printed on the FAN. If you do not select a career, then awards for all the student's careers are printed on the FAN. If the student is a multiple career student and you want awards for all careers printed on the FAN, do not select a career. When selecting a group of students, if you select a career, then only the awards for that career for each student are printed on the FAN. If you have multiple career students and you want awards for all their careers to be printed on the FAN, do not select a specific career.
Letter Code	Select *FAN* for the FAN letter.
Award Period	Select the award period for which you want the FAN letter created. The default value is *Academic. Non Std* (non standard) is also available for nonacademic terms. FA Term determines the default for these periods and uses the last effective-dated sequence or effective-dated status. For example, if the default is *Academic* and because different academic statuses are available in FA Term, such as fall 2006-2007, spring 2006-2007, and summer 2007-2008, the system uses the last effective-dated sequence or effective-dated status for that aid year.
Address Usage	The address usage determines which address is printed on the FAN letter. Address usage is defined by your institution.
Address Name	Select the address name that you want to use for this FAN letter. This determines what name is printed on the FAN letter. Address name is defined by your institution.
Print Canceled/Declined Awards	Select if you want the FAN letter to print canceled and declined awards in addition to offered and accepted awards.
Institutional Methodology	Select if you want institutional costs to be included as part of the FAN letter data. The institutional costs are summed into the Personal/Miscellaneous budget category.
Update FAN Attributes	Select to update the information on the Award Notification Summary page and mark the communication record completed. Clear the check box to run the selection process in test mode.
Run	Run the Select students who need a FAN process (FANSEL) when you are ready to select students for the extract file.

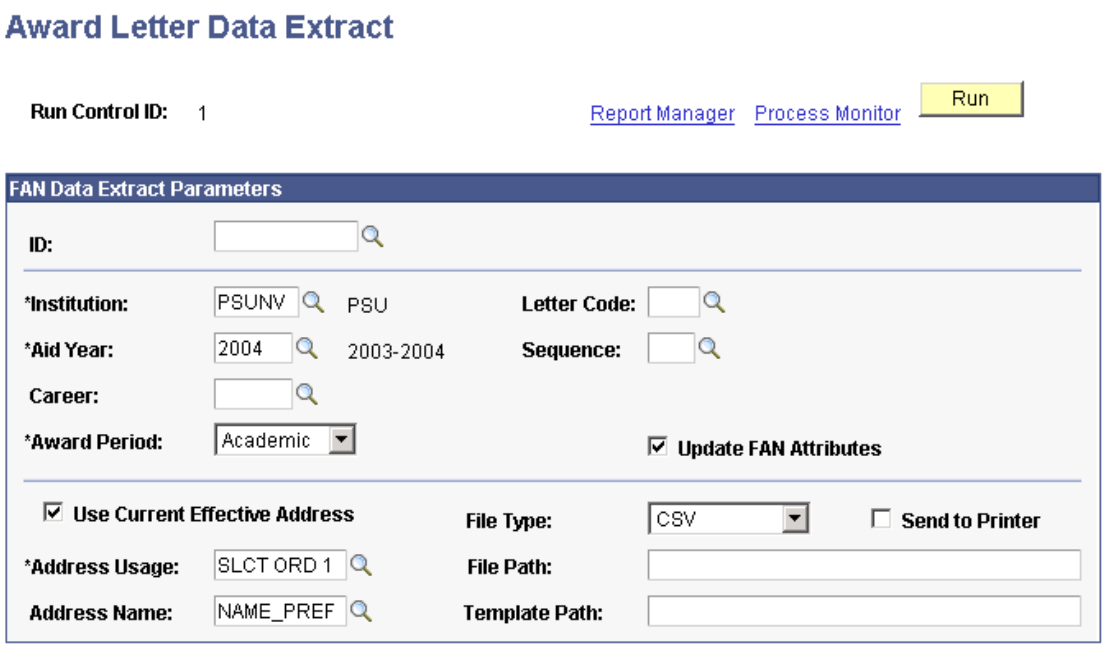
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> **Note**
>
> Be sure to run the FANSEL process in update mode at least once. If you never run the process in update mode the communication request is never marked as completed and it may always be selected for award notification. If you forget to Update FAN Attributes on this step, you can also update it during the Extract File Creation step.

Creating the FAN Extract File and Producing the FAN Letter

Access the Award Letter Data Extract page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Create Award Letter Data File**, and then **Award Letter Data Extract**).

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



Field or Control	Description
ID	Select the student that you are working with if you are creating a FAN letter for only one student. If no ID is selected, all students who have been selected to receive a FAN are included in the extract file.
Letter Code	Select *FAN*.

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Field or Control	Description
Sequence	This number distinguishes between versions of letters sent to a student. Each time a new communication and award notification letter (FAN) are requested, a sequential number is assigned to the award notification letter. This sequence is increased by one each time an additional award notification letter is requested. The sequence number allows you to select which version of the award notification letter that you want to use if an ID is entered.
Career	If you select an ID and a sequence number you can select a career for the student. If you select a career, only awards for that career are printed on the FAN. If you do not select a career, then awards for all the student's careers are printed on the FAN. If the student is a multiple career student and you want awards for all careers printed on the FAN, do not select a career. When selecting a group of students for whom to run this process, if you select a career, then only the awards for that career for each student are printed on the FAN. If you have multiple career students and you want awards for all their careers to be printed on the FAN, do not select a career.
Award Period	Select the award period for which you want the FAN letter created. The default value is *Academic. Non Std* (non standard) is also available for nonacademic terms. FA Term determines the default for these periods and now uses the last effective-dated sequence or effective-dated status. For example, if the default is *Academic* and because different academic statuses are available in FA Term, such as fall 2006-2007, spring 2006-2007, and summer 2007-2008, the system uses the last effective-dated sequence or effective-dated status for that aid year.
Update FAN Attributes	Select to update the **Print Status** field on the Award Notification Summary page and update the communication record. Clear to run the process in test mode only.
Use Current Effective Address	Select to have the Create Award Data Extract process (FANLTR) re-select the student's name and address information using the information that you enter in the **Address Usage** and **Address Name** fields on this page. Clear to have the extract file contain the name and address chosen during the FANSEL process.
Address Usage	The address usage determines which address is printed on the FAN letter. Address usage is defined by your institution. The default value is the address usage from the student selection process.

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Field or Control	Description
Address Name	Select the address name to use for this FAN letter. This determines what name is printed on the FAN letter. Address name is defined by your institution. The default value is the address name from the student selection process.
File Type	Select the extract file type to be created. Values are: *JetForm*, *CSV*, and *Other*. *JetForm* is the default value. The value that you select in this field determines what other file-related fields appear on the page. If you select *JetForm*, the page displays the **File Path** and **Override Flags** fields. If you select *CSV*, the page displays the **Send to Printer** check box, the **File Path** field, and the **Template Path** field. If you select *Other*, the page displays the **File Path** field.
Send to Printer	If you select *CSV* for the file type and you want the letter to go directly to the printer during the Microsoft Word merge process, select this check box.
File Path	Enter the full path of where you want the extract file to reside after the FANLTR process is run. Include a / or \ at the end of the path, such as C:\TEMP\ or //user/tmp/. Make sure that the destination folder or directory is a valid share folder or directory on the network.
Template Path	If you select *CSV* for the file type, you must indicate where your award letter document (FANLTR.doc) and your template file (FANLTR.dot) reside. The Microsoft Word merge process uses this information. This location is usually \\PS_HOME\Winword.
Override Flags	If you select *JetForm* for the file type, specify print options to use when producing the FAN, such as the number of copies to create.
Run	Click to run this request. Process Scheduler runs the Create Award Data Extract process (FANLTR) at user-defined intervals. After the system runs the process successfully, you can retrieve the extract file from the file path you specified. You can then use the extract file in whatever software you use to create the actual FAN letter.

Printing the Award Letter Using Microsoft Word

To perform a merge using Microsoft Word:

1. Use the Award Letter Data Extract page to create a FAN extract file, using CSV for the file type. The date file output has been changed from .LTR (MS-Word) to .CSV.
2. Specify the file path where you want the extract file and the parameter file to go in the *File Path* field. This can be a shared folder on your local machine or a shared folder on any valid network drive path. An example of a file path is C:\TEMP\.

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3. Run the process from the Process Scheduler. When the process completes, the extract file for the FAN (FAN.CSV) and the Word Merge parameters file (FANPARMS.DAT) are located at the file path you specified in Step 2.
4. Move the FANPARMS.DAT file into the C:\TEMP\ folder if it is not already located there.
5. Create a shortcut for MS-Word on your desktop specifically to run the merge process for the FAN letter. You must create this shortcut.
   a. Open Windows Explorer and find the Winword.exe file (usually in C:\Apps\Office\).
   b. Drag the button onto your desktop to create a shortcut.
   c. Right-click the shortcut and select Properties to edit the shortcut properties. Select the Shortcut tab.
   d. Edit the **Target** field to include the following parameter path values for launching the Winword file, template, and macro. In this example, we are pointing to C:\PS\LS8\Winword\ to find the FANLTR.DOT file, but you must enter the valid directory where the template resides on your system. However, you must enter /mPRCSFANLTR for the name of the macro.

      You must use a space to separate the path for launching the Winword file (which should already be in the **Target** field) from the path to the template and to separate the path to the template from the macro name. For example: C:\Apps\Office97\Office\WINWORD.EXE C:\PS\LS\Winword\FANLTR.DOT /mPRCSFANLTR
   e. Click **OK** when you finish editing the **Target** field.
   f. Rename the shortcut to indicate that the shortcut launches the merge process, such as FAN Winword.exe.
   g. Double-click the Word desktop shortcut you created to launch the merge process. The merge process creates a file called SAFANLTR.DOC in the C:\TEMP\ folder.
   h. Open the SAFANLTR.DOC file and print the FAN letters.

> **Note**
>
> If you select the **Send to Printer** check box on the Award Letter Data Extract page, the file prints automatically on your default printer.

> **Warning**
>
> If you are using Microsoft Office 2000, you must have applied service pack SR1 for the FAN to print. If you have not applied the service pack, the FAN does not print.

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Setting Up FAN Printing Using the Forms Engine

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

This section provides an overview of Forms Engine FAN printing and discusses how to:

- Set up FE Award notification form types.
- Set up FA demographic use information.
- Set up the sort order.
- Set up a printer.
- Set up FE award notification equations.
- Set up FE award notification defaults.

Understanding Forms Engine FAN Printing

Prior to 2003-2004, printing FAN letters required you to initiate a process within the Packaging feature of Financial Aid. Navigate to Report Manger to view the results and print the FAN. Through the use of Forms Engine, an Application Engine program that outputs information in PostScript format, you can print FAN letters directly to your PostScript printer without leaving Packaging. Using Forms Engine for printing FAN eliminates the need for JetForm, Crystal Reports, and Word Merge.

The process prints the award notifications and updates a communications table to indicate that an award communication has been sent. You can initiate a process to print a single FAN letter for an individual student or for students in batch.

The previous process for printing FAN letters remains available. However, the new process is more streamlined and efficient than the previous process.

Pages Used to Set Up FAN to Print Using Forms Engine

Page Name	Definition Name	Navigation	Usage
FE Award Notification Form Types (forms engine award notification form types)	FANLTR_FORM_TYPE	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Notification Form Types**, and then **FE Award Notification Form Types**	Set notification form types.

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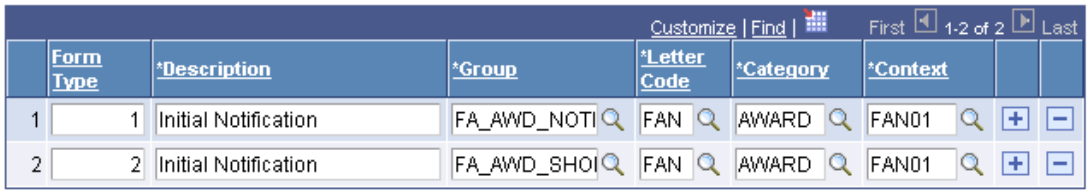
Page Name	Definition Name	Navigation	Usage
FA Process Demographic Use	FA_PRCSDEMO_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**	Indicate from where the student's data should be gathered.
Sort Order Names	SORT_NAME_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Sort Order Names**, and then **Sort Order Names**	Set the default criteria for the Setup Defaults and Run Controls.
FE Award Notif. Select. Eqtns (forms engine award notification selection equations)	FANLTR_EQTN_SEL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Selection Equations**, and then **FE Award Notif. Select. Eqtns**	Set up the table for FAN equations.
Printer Name	PRINTER_TBL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Printer Names**, and then **Printer Name**	Set up table for list of available printers. It allows you to define local printer options.
FE Award Notification Defaults (forms engine award notification defaults)	FANLTR_DEFAULTS	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Defaults**, and then **FE Award Notification Defaults**	Set award notification default information.

Setting Up FE Award Notification Form Types

Access the FE Award Notification Form Types page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Notification Form Types**, and then **FE Award Notification Form Types**).

This example illustrates the fields and controls on the FE Award Notification Form Types page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Form Type	Identifies the form type for this award notification.
Description	Describes the delivered form type. Form Type 1 is the initial notification of financial aid. Form Type 2 is shorter version of the initial notification.
Group	Identifies in which group of letters this letter code exists.
Letter Code	The code from the Campus Community Standard Letters page for this communication. You can define the letter code for the FE FAN process.
Category	The communications category associated with this letter code. You can define the category for the FE FAN process.
Context	The context from the Campus Community Communications Context page that is included in this category. You can define the context for the FE FAN process

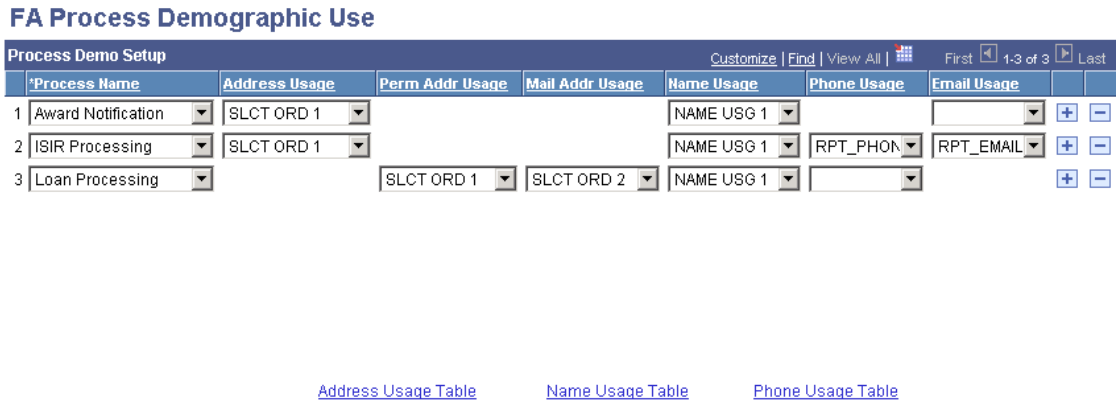
Setting Up FA Demographic Use Information

This setup uses the Campus Community components to evaluate Address and Name Usage processing requirements and to indicate from where the student's demographic information should be gathered.

Access the FA Process Demographic Use page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Define Demographic Data Use**, and then **FA Process Demographic Use**).

This example illustrates the fields and controls on the FA Process Demographic Use page. You can find definitions for the fields and controls later on this page.

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Select the appropriate option for each of the fields.

Field or Control	Description
Process Name	*Award Notification* process is new to FE FAN. You must insert a new row and select Award Notification as the process name.
Address Usage	Reserved for financial aid processes and is not used for loans.
Perm Addr Usage (permanent address usage)	Used to set the permanent address for loan processing.
Mail Addr Usage (mail address usage)	Used for temporary address.
Name Usage	Indicates which name to use for the student or borrower.
Phone Usage	Indicates the type of phone such as business phone or cellular phone. Used to select phone usage table settings defined in Campus Community setup.
Email Usage	Indicates the type of email address such as home, business, dorm, campus, or other. Used to select email usage table settings defined in Campus Community setup.
Address Usage Table	Click to access the Address Usage page to define or review address usages.
Name Usage Table	Click to access the Name Usage page to define or review name usages.
Phone Usage Table	Click to access the Phone Usage page to define or review phone usages.

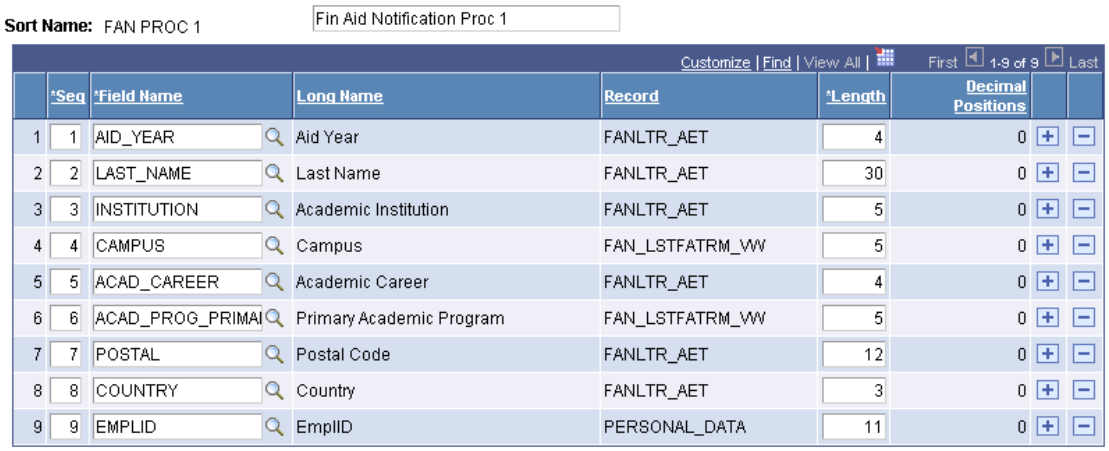
Setting Up the Sort Order

You can sort the data by field to control the order in which the output documents generated by a batch print process appears. Two sort sequences are delivered with the system. FAN PROC 1 displays information by **Record, Field Name, Length** and **Long Name.** FAN PROC 2 displays information by **Field Name, Long Name, Record,** and **Length.** You must set up any other sort sequences for your institution.

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Access the Sort Order Names page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Sort Order Names**, and then **Sort Order Names**).

This example illustrates the fields and controls on the Sort Order Names page. You can find definitions for the fields and controls later on this page.

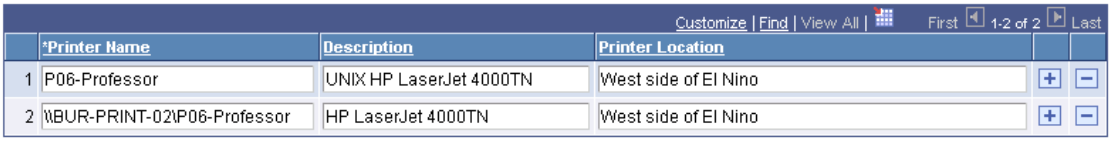


Field or Control	Description
Sort Name	The name of the sort sequence.
Seq (sequence)	The hierarchy of how you want data to sort. Use a Zip Code sort to obtain information in the order to use for a bulk mailing.
Field Name	The name of the field.
Length	The character length of the previous field.
Field Long Name	The full name of the field displayed.
Decimal Positions	Displays how many positions appear after the decimal point if this is a numeric field.

Setting Up a Printer

Access the Printer Name page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Printer Names**).

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



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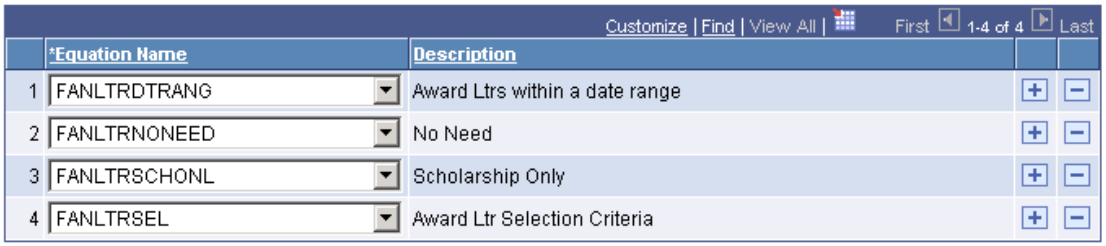
Field or Control	Description
Printer Name	Enter the printer name and location of the path.
Description	Enter the description of the printer.
Printer Location	Enter the printer location.

Setting Up FE Award Notification Equations

Access the FE Award Notif Select. Eqtns page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Forms Engine Notification**, and then **Define Selection Equations**).

> **Note**
>
> You must create equations using the Equation Engine prior to setting up the FE Award Notif Select. Eqtns page. See Equation Engine documentation for more information on setting up and using the Equation Engine.

This example illustrates the fields and controls on the FE Award Notif Select. Eqtns page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Equation Name	Select the name of the equation.
Description	The description of the equation.

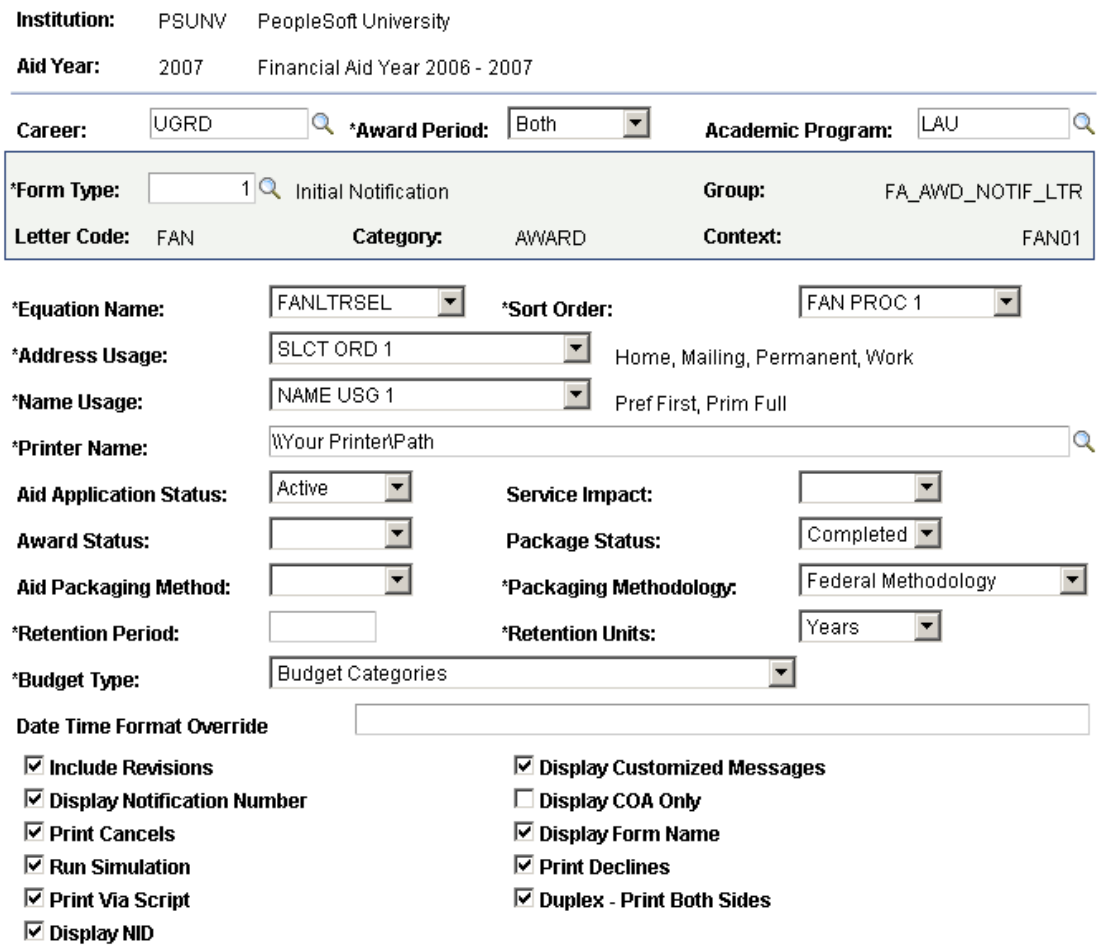
Setting Up FE Award Notification Defaults

Access the FE Award Notification Defaults page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Defaults**).

> **Note**
>
> This page is designed to define the initial setup for the One-Up Print Process and Batch Print Run Controls.

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



Field or Control	Description
Career	Define the options for financial aid processing. Examples of standard career options are undergraduate or graduate.
Award Period	The award period that is used in packaging. Values include: *Academic, Non-Standard,* and *Both.*
Academic Program	Academic program values that are used for financial aid processing.
Form Type	Define and create the values using the Forms Engine. *Initial Notification 1* and *Initial Notification 2* (Short FAN) are delivered with the system.
Group	Define this in the Setting Up the Forms Engine. It identifies the Form Type to a specific processing group.
Letter code	The code for the letter associated with this communication. You define this on the FE Award Notification Form Type page.

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Field or Control	Description
Category	The communications category associated with this letter code. You define this on the FE Award Notification Form Type page.
Context	The context from the Campus Community Communications Context page that is included in this category. You define this on the FE Award Notification Form Type page.
Equation Name	Define this using the Equation Engine. FANLTRSEL (Award Letter Selection Criteria), FANLTRDTRANG (Award Letters within a Date Range), FANLTRNONEED (Students with No Need) are delivered with the system. **Note:** There is a change to the logic behind the FAN letter selection criteria. If you indicate in any of the run controls that cancelled and declined awards should print, the new version of the FANLTRSEL equation excludes letters for students who only have cancelled and declined awards.
Sort Order	Defined using the Sort Order Set Up. Sorts FE FAN output by sorting preferences.
Address Usage	Defined using the Process Demo Set Up. Allows you to override Address Usage options.
Name Usage	Defined using the Process Demo Set Up. Allows you to override Name Usage options.
Printer Name	Defined using the Printer Names Set Up. Allows you to select defined printer.
Aid Application Status	The values are based on Packaging Status Summary. Initially set to *Active.*
Service Impact	Determines whether or not to print a notification based on service impacts.
Award Status	Values are based on the Packaging Award Status field. Initially select *Accepted* or *Offered.*
Package Status	Values are based on the Aid Packaging Status field on the Packaging Status Summary page. You should set this option to *Completed* and never to *Repackage.*
Aid Packaging Method	Values are based on how aid packages were created. Values are *Blank, Auto, Counselor*, and *Not Packaged.* Initially select *Blank* to ensure that the program evaluates all options.
Packaging Methodology	Values are *Federal Methodology* and *Institutional Methodology.*
Retention Period	Indicates the length of time that Forms Engine keeps historical data.
Retention Units	Indicates the unit used in **Retention Period.** Use *Years* as the unit to facilitate audit requirements.
Budget Type	Values are *Budget Categories* (Institutional) and *Pell Categories.*

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Field or Control	Description
Date Time Format Override	(Optional) As a default, the FE FAN prints the date and time format defined for message catalog entry (138,1), which displays throughout the system. For example, if the message catalog entry is set as dd:MMMM:yyyy, which defines a system date-only format, and you need to display a date and 24-hour format for FE FAN only, enter dd:MMMM:yyyy:HH:mm:ss. For more information on defining date and time formats, see the explanation field for the Message Catalog Entry (138,1) in *PeopleTools: System and Server Administration*, "Using PeopleTools Utilities."
Include Revisions	Select to include revisions made to aid packages in the print job.
Display Notification Number	Select to print the number on the aid notification.
Print Cancels	Select to print the information if an award is cancelled.
Run Simulation	Select to run this print job in simulation mode.
Print Via Script	Select to allow for multi-platform printing.
Display NID	Select to display the student's National ID.
Display Customized Messages	Select to display customized, on demand user-defined messages from the FE Award Notification Student Defaults page Comment Box.
Display COA Only	Select to display the Cost Of Attendance/Budget information on the Aid Notification. The system does not display the resource information on the printed aid notification if you select this option.
Display Form Name	Select to display the name of the form on the printed aid notification.
Print Declines	Select to print the information if a student declines an award.
Duplex - Print Both Sides	Select to allow printing of both sides of a page.

Related Topics

- Campus Solutions Application Fundamentals: Understanding Equations
- Setting Up FE Award Notification Defaults
  Access the FE Award Notification Defaults page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Defaults**).

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Printing FE FAN Using Forms Engine

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

This section discusses how to:

- Process and print FE FAN letters in batch.
- Process and print an individual FE FAN letter.
- View FE Award Notification inquiries.
- View award notification summary.
- Reprint FE FAN letters.
- View examples of printed FE FAN letters.

Pages Used to Print FAN Using Forms Engine

Page Name	Definition Name	Navigation	Usage
FE FAN Letter Run Control	RUN_CNTL_FANLTR	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Batch**, and then **FE FAN Letter Run Control**	Set up to run FAN letters in batch.
FE Award Notification Student Defaults	AWARD_NOTIF_DETAIL	• **Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification One-Up**, and then **FE Award Notification Student Defaults** • Click the **Award Notification** link on the Award Entry page.	Display award status or print an award notification for an individual student.

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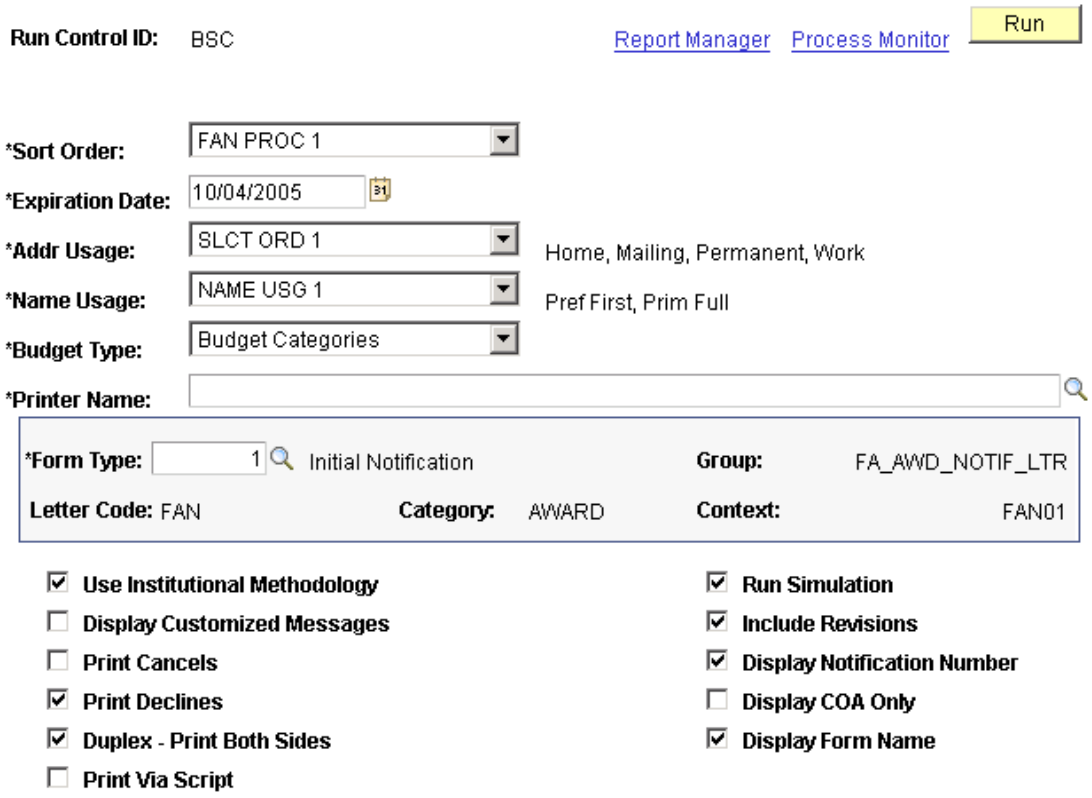
Page Name	Definition Name	Navigation	Usage
FE Award Notification Inquiry	AWARD_NOTIF_DETAIL	• **Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Inquiry**, and then **FE Award Notification Inquiry** • Click the **Award Notification** link on the Packaging Status Summary page.	View award notification detail information.
FE Award Notification Summary	FANLTR_SUMMARY	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Summary**, and then **FE Award Notification Summary**	View a summary of the non-simulation award notification processes and the award notification for an individual student.
FE Award Notification Reprint	FAN_RPRT_RUNCTL	**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Reprint**, and then **FE Award Notification Reprint**	Reprint an award notification for an individual student.

Processing and Printing FE FAN Letters in Batch

Access the FAN Letter Run Control page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Batch**, and then **FAN Letter Run Control**).

This example illustrates the fields and controls on the FAN Letter Run Control page (1 of 2). You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Expiration Date	The date that the information is purged from the system.
Addr Usage (address usage)	Defined using the Process Demo Set Up. This allows you to override Address Usage options defined on the FE Award Notification Defaults page.
Sort Order	Defined using the Sort Order Set Up. This allows you to override the sort order defined in the FE Award Notification Defaults page. It sorts FE FAN output by sorting preferences.
Name Usage	Defined using the Process Demo Set Up. This allows you to override the name usage options defined in the FE Award Notification Defaults page.
Budget Type	Values are *Budget Categories* (Institutional) or *Pell Categories.*
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined in the FE Award Notification Defaults page.
Form Type	Defined in the Setting Up the Forms Engine. Identifies the form type to a specific processing group.
Group	Defined in Award Notification Form Type Set Up. Identifies in which group of letters this letter code exists.

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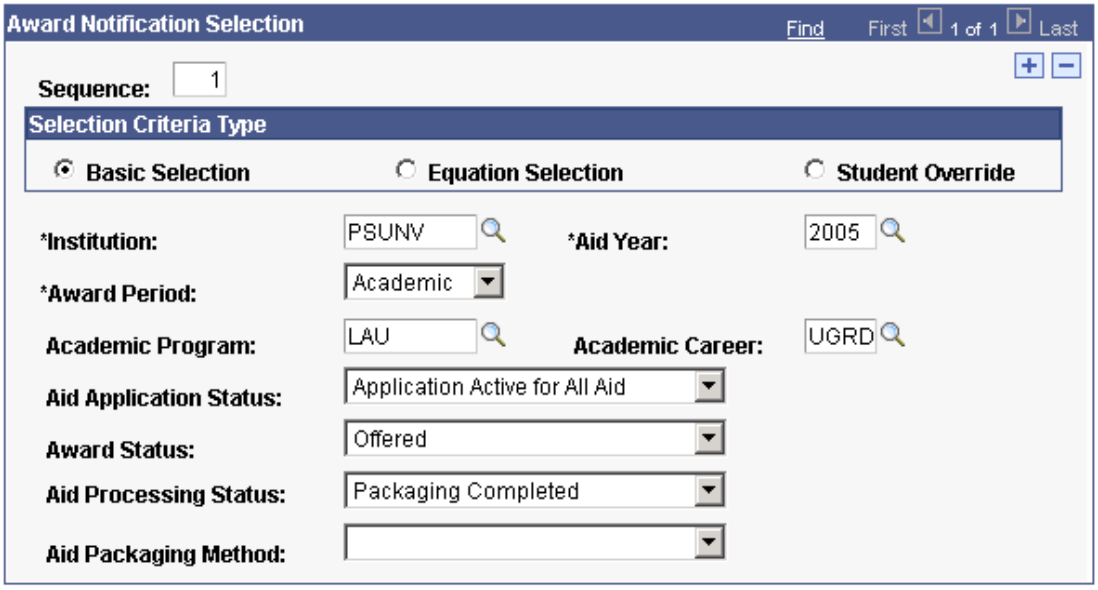
Field or Control	Description
Letter Code	The code from the Campus Community Standard Letters page for this communication. You define this on the FE Award Notification Form Type page.
Category	The communications category associated with this letter code. You define this on the FE Award Notification Form Type page.
Context	The context from the Campus Community Communications Context page that is included in this category. You define this on the FE Award Notification Form Type page.
Use Institutional Methodology	Select to use institutional methodology.
Display Customized Messages	Select to display customized, on demand user defined messages from the FE Award Notification Student Default page Comment Box.
Print Cancels	Select to print the information if an award is canceled.
Print Declines	Select to prints the information if an award is declined.
Print Via Script	Select to allow for multi-platform printing.
Run Simulation	Select to run this print job in simulation mode.
Include Revisions	Select to include revisions made to aid packages in the print job.
Display Notification Number	Displays number counter of letter. This information prints on the aid notification.
Display COA Only	Select to display the Cost Of Attendance/Budget information on the aid notification. The system does not display recourse information on the printed aid notification if you select this option.
Display Form Name	Select to display the name of the form on the printed aid notification.

FAN Letter Run Control with Basic Selection

Access the FAN Letter Run Control page with Basic Selection (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Batch**, and then **FAN Letter Run Control**).

This example illustrates the fields and controls on the FAN Letter Run Control with Basic Selection). You can find definitions for the fields and controls later on this page.

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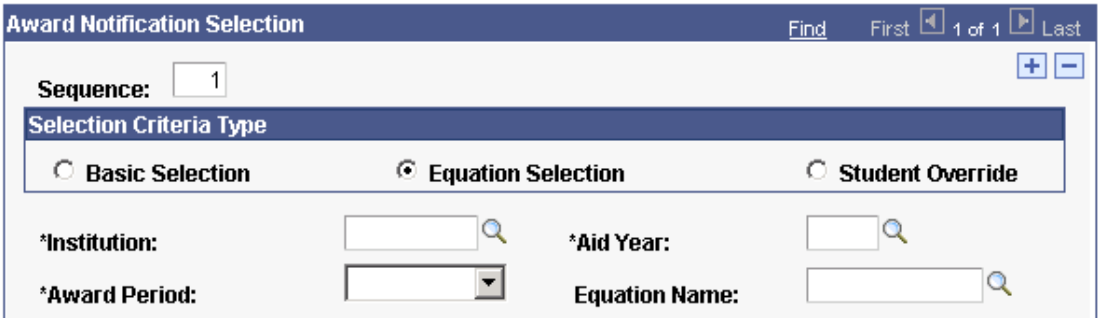
Field or Control	Description
Sequence	Indicates the sequence number.
Selection Criteria Type	Values include *Basic Selection, Equation Selection,* and *Student Override.* **Note:** The system displays the following fields when you select *Basic Selection.* Use the fields to define a simple population selection.
Award Period	The award periods used in packaging. Values include: *Academic, Non-Standard,* and *Both.*
Academic Program	Academic program values used for financial aid processing.
Academic Career	Define the careers for financial aid processing.
Aid Application Status	Values are based on Packaging Award Status field. You should set this option to *Accepted* or *Offered.*
Award Status	Values are based on Packaging Status Summary field, Aid Packaging Status. You should select *Packaging Completed.*
Aid Processing Status	Values based on how aid packages were created. Values include *Blank, Auto, Counselor,* and *Not Packaged.* Initially select *Blank* to ensure that the program evaluates all options.
Aid Packaging Method	Values are based on Packaging Award Status field. You should select *Accepted* or *Offered.*

FAN Letter Run Control with Equation Selection

Access the FAN Letter Run Control page with Equation Selection (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Batch**, and then **FAN Letter Run Control**).

This example illustrates the FAN Letter Run Control page with Equation Selection.

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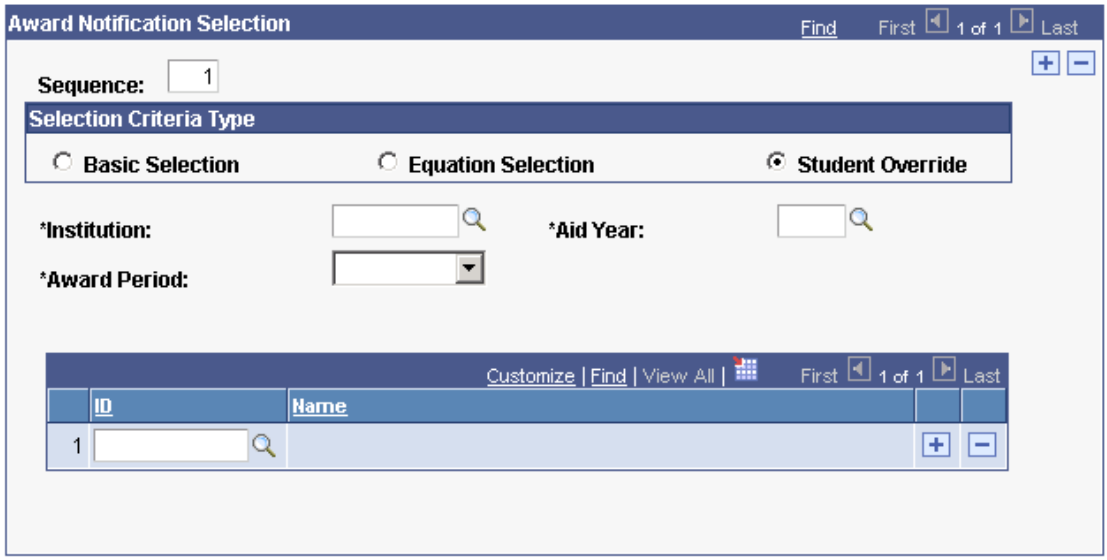


This selection allows you to select a batch printing population defined by using an equation.

FAN Letter Run Control with Student Override Selection

Access the FAN Letter Run Control page with Student Override (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Batch**, and then **FAN Letter Run Control**).

This example illustrates the FAN Letter Run Control page with Student Override Selection page.



This selection allows you to run batch processes for a single or multiple student IDs if row insert is used.

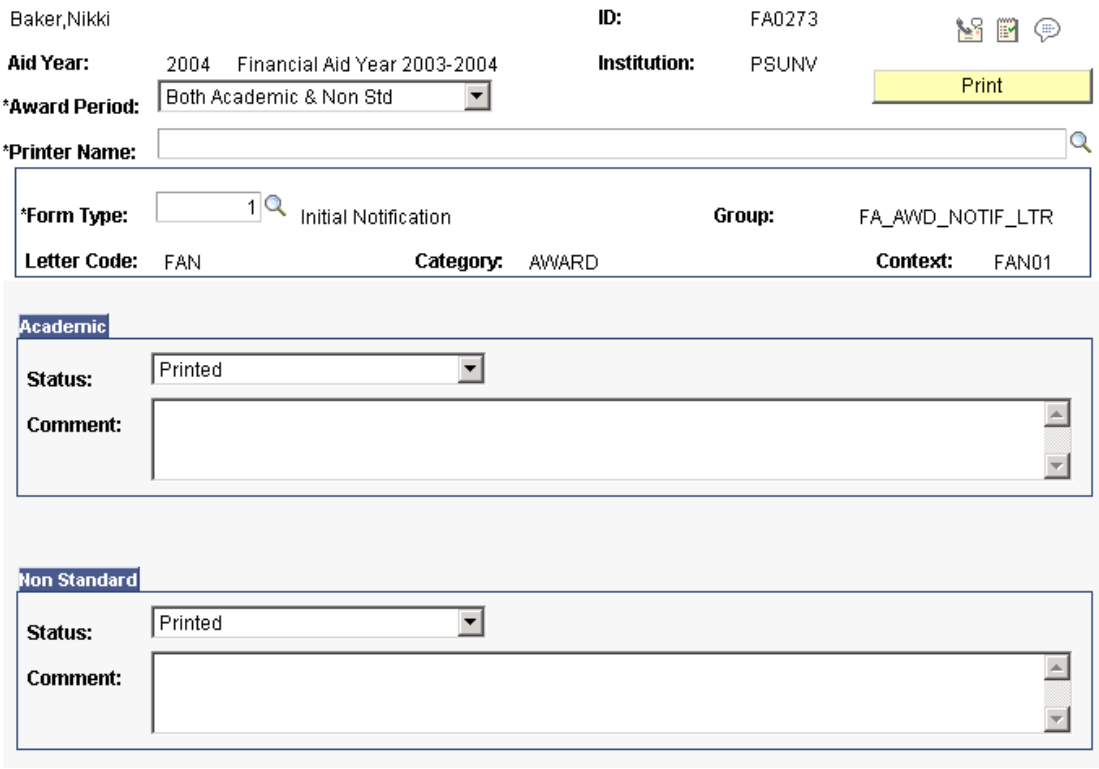
Processing and Printing an Individual FE FAN Letter

Access the FE Award Notification Student Defaults page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification One-Up**, and then **FE Award Notification Student Defaults**).

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> **Note**
>
> You must first set default values on the Default Setup Page before using the FE Award Notification Detail page.

This example illustrates the fields and controls on the FE Award Notification Student Defaults page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> The **OK, Cancel,** and **Apply** buttons appear below the page when you access it by clicking the **Award Notification** link on the Award Entry, Student Aid Package page.

The system displays the **ID, Aid Year,** and **Institution.**

Field or Control	Description
Award Period	Award periods used in packaging. Values include *Academic, Non-Standard,* and *Both.*
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined on the FE Award Notification Defaults page.

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Field or Control	Description
Form Type	Use the Forms Engine to define and create options. Initial Notification Option 1 and Option 2 (Short FAN) are delivered with the system.
Group	Defined in the Setting Up the Forms Engine. Identifies the Form Type to a specific processing group.
Letter Code	The code from the Campus Community Standard Letters page for this communication. Define this on the FE Award Notification Form Type page.
Category	The communications category associated with this letter code. Define this on the FE Award Notification Form Type page.
Context	The context from the Campus Community Communications Context page included in this category. Define this on the FE Award Notification Form Type page.

Academic

Field or Control	Description
Status	Values include: *Blank:* Package does not exist. *Initial:* Automatically switches to this status in preparation of the print process. You can manually reset this after the letter is run in real time. This status does not change to printed if you run the job in simulation. *Hold:* Holds the print option for this award period. *Revised:* Automatically switches to this status after the initial letter prints. You can manually reset this after the letter is run in real time. This status does not change to printed if you run this job in simulation.
Comment	This allows you to write free form text. This comment prints if the **Display Customized Messages** check box is selected either on the FE Award Notification Defaults page or the FE Award Notification Run Control. The system prints this customized message in addition to any item type related message.

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Non-Standard

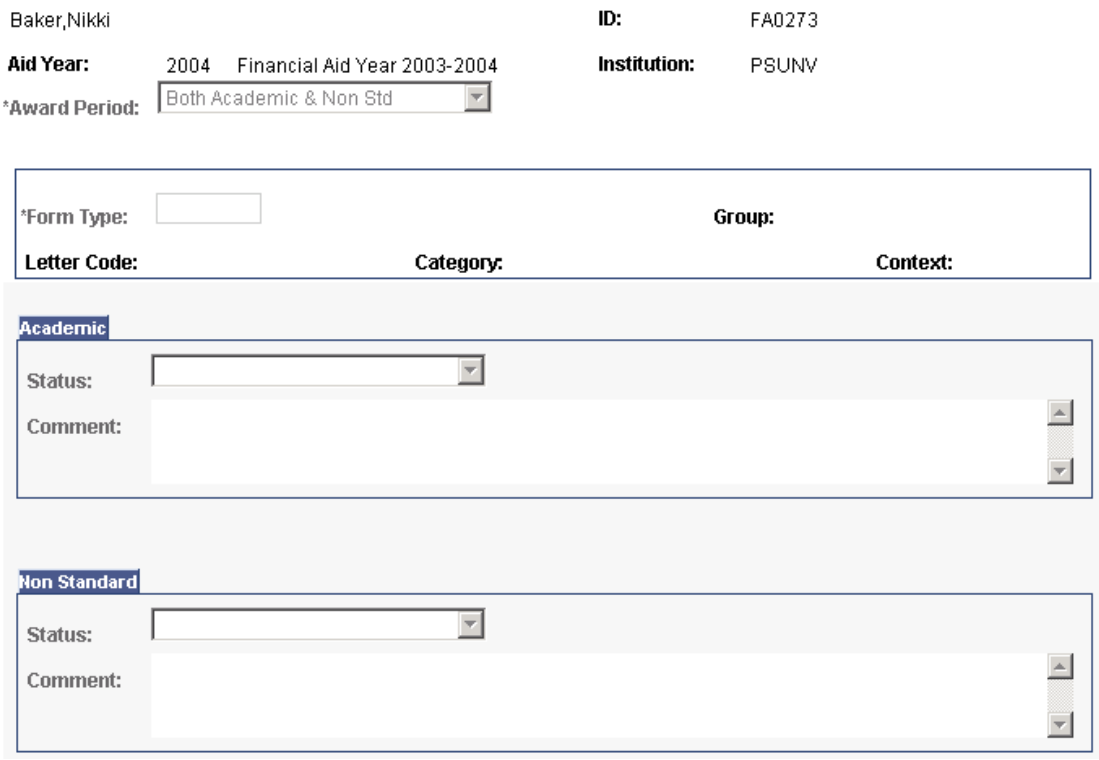
Field or Control	Description
Status	Values include: *Blank:* Package does not exist. *Initial:* Automatically switches to this status in preparation of the print process. You can manually reset this after the letter is run in real time. This status does not change to printed if you run the job in simulation. *Hold:* Holds the print option for this award period. *Revised:* Automatically switches to this status after the initial letter prints. You can manually reset this after the letter is run in real time. This status does not change to printed if you run this job in simulation.
Comment	This allows you to write free form text. This comment prints if the **Display Customized Messages** check box is selected either on the FE Award Notification Defaults page or the FE Award Notification Run Control. The system prints this customized message in addition to any item type related message.

Viewing FE Award Notification Inquiries

Access the FE Award Notification Inquiry page (click the **Award Notification** link on the Packaging Status Summary page).

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

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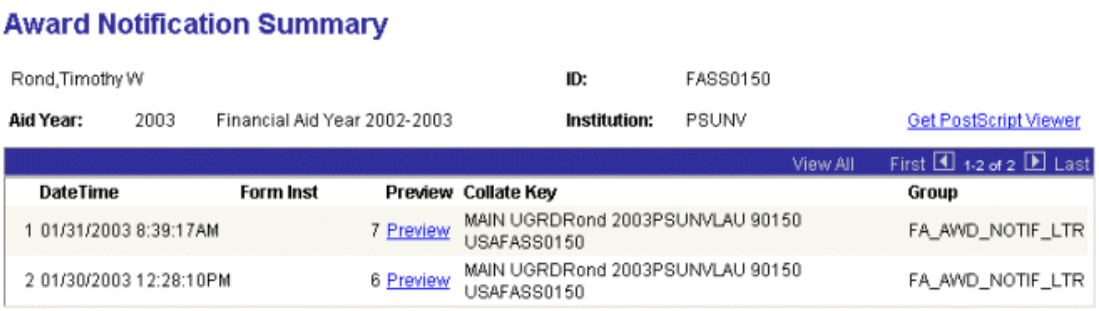


This page is view only. It is intended for front-line users with limited access or security. You cannot process actions or invoke processes from this page.

Viewing Award Notification Summary

Access the Award Notification Summary page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Summary**).

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



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> **Note**
>
> To use the preview link, you must load the Get Post Script Viewer program. This program is freeware. You must load the GSVIEW and the GNU GHOSTSCIPT programs from this link.

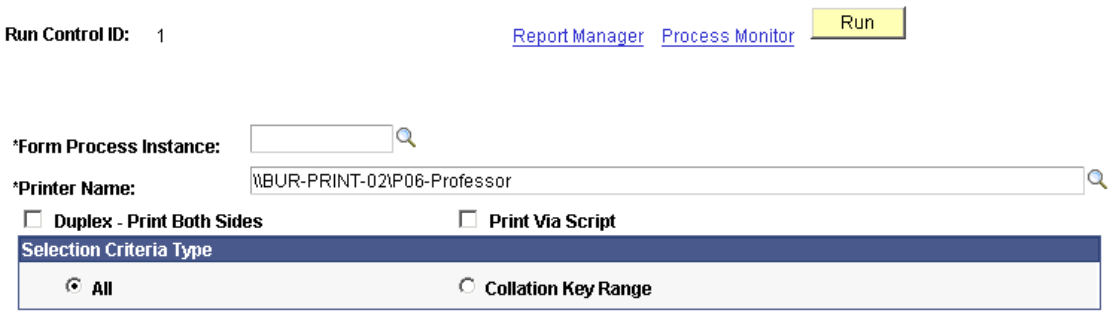
This page is view only. It is intended for front-line users with limited access or security.

Click the **Preview** link to view and reprint a copy of the FE FAN letter associated with the Form Instance number.

Reprinting FE FAN Letters

Access the Award Notification Reprint page (**Financial Aid**, and then **Awards**, and then **Notification Letter**, and then **Award Notification Reprint**).

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



The system displays the **Run Control ID.**

Field or Control	Description
Form Process Instance	This information comes from Process Monitor Log Files.
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined on the FE Award Notification Defaults page.
Print Via Script	Select to allow for multi-platform printing.
Selection Criteria Type	Values include: *All:* Allows you to reprint the entire batch of students for the form process instance. *Collation Key Range:* Allows you to reprint an individual student or a range of students.

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Modifying FE FAN Form Letter Templates

> **Important**
>
> Financial Aid Notification (FAN) letter is a deprecated product. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Campus Community Fundamentals: Using the Communication Generation Process

This section discusses how to:

- Change an address.
- Change messages and instructions.

> **Note**
>
> You may want to consult your technical support group before implementing this procedure.

Changing an Address

The system uses the school address information from the Academic Institution Table for the FE FAN letter. To change an academic institution's address, use the Academic Institution 1 page by navigating to **Set Up SACR**, and then **Foundation Tables**, and then **Academic Structure**, and then **Academic Institution Table.**

Changing Messages and Instructions

You can update or change messages and instructions.

To change the *Please return within 90 days.* message:

1. Navigate to **PeopleTools**, and then **Utilities**, and then **Use**, and then **Message Catalog.**
2. Enter *14402* in the **Message Set Number** field and click **Search.**
3. Click **Find** and enter *98* in the **Explorer User Prompt** dialog box.
4. Click **OK.**
5. Use the **Message Text** field to update the message text.
6. Save your changes.

To change the *Instructions* section:

1. Navigate to **PeopleTools**, and then **Utilities**, and then **Use**, and then **Message Catalog.**
2. Enter *14420* in the **Message Set Number** field and click **Search.**
3. Click **Find** and enter *180* in the **Explorer User Prompt** dialog box.
4. Click **OK.**

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5. Update the text in the **Explanation** field.
6. Save your changes.

To move existing information from one page to another or adding another page, change the Application Engine Program called FAAWDNOTIF.

> **Note**
>
> It is useful to know the page names in Application Designer. The first page of the FE FAN is called FA_AWD_NOTIF_LTR1.

Setting Up and Accessing a College Financing Plan

This section discusses how to:

- Set up group options.
- Set up institution information.
- Set up budget mapping.
- Set up award mapping.
- Map housing.
- Define interest rates and work hours.
- Assign College Financing Plan groups.
- View College Financing Plans.

Understanding the College Financing Plan

The College Financing Plan is a consumer tool created by the United States Department of Education (ED). The format is prescribed by an ED-issued template, which this feature of the system uses without modification. The College Financing Plan is designed to provide a standardized award letter allowing students to easily compare financial aid packages and make informed decisions on where to attend college. According to ED, it can be used with or in lieu of a financial aid award letter.

Within the system, you set up and assign students to a College Financing Plan Group. The exact number of groups you create is based on your school's needs and setup. Some schools may only require one group per aid year while others may need several. The pages used for setting up College Financing Plan groups control what institution and student data is used when the College Financing Plan is generated for the student. Once your groups are created, you assign them to the appropriate population of students. You can do this manually for one student at a time on the Packaging Status Summary page, or in batch using Population Update. Once assigned, students have access to their College Financing Plan in Financial Aid Self Service. Access to the College Financing Plan can be revoked by removing the student from the College Financing Plan group, which you can also do manually or in batch.

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Pages Used for College Financing Plan

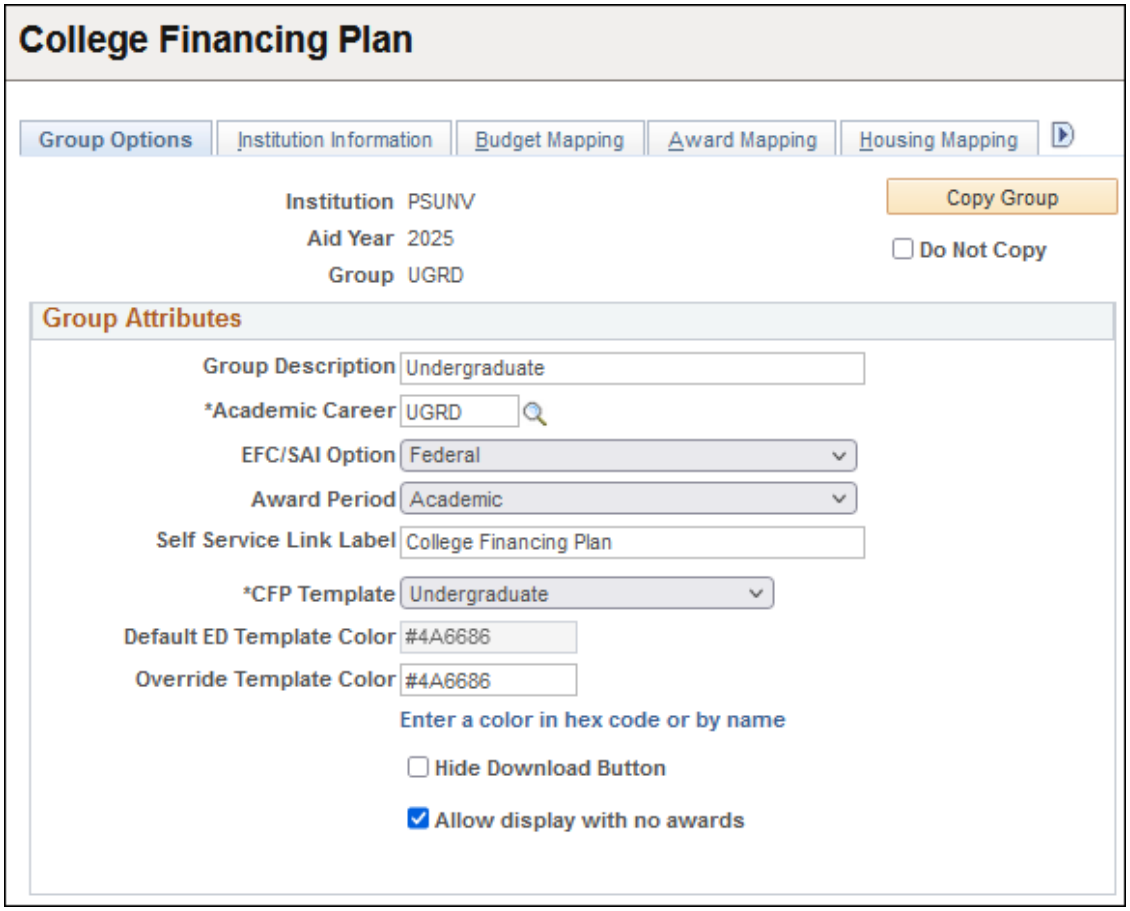
Page Name	Definition Name	Navigation	Usage
Group Options	SFA_SS_SETUP	Set Up SACR, Product Related, Financial Aid, College Financing Plan, Group Options	Select group attributes.
Institution Information	SFA_SS_SETUP2	Set Up SACR, Product Related, Financial Aid, College Financing Plan, Institution Information	Enter institution data and metrics.
Budget Mapping	SFA_SS_SETUP_COA	Set Up SACR, Product Related, Financial Aid, College Financing Plan, Budget Mapping	Map cost groups to budget item categories.
Award Mapping	SFA_SS_SETUP_AWD	Set Up SACR, Product Related, Financial Aid, College Financing Plan, Award Mapping	Map award groups to Fin Aid Type, Source, and Federal ID.
Housing Mapping	SFA_SHS_ONOFF_MAP	Set Up SACR, Product Related, Financial Aid, College Financing Plan, Housing Mapping	Map housing cost groups to budget item categories and identify whether the mapping applies to on campus or off campus residence. This applies only to AY 2021 and later.
Interest Rates and Work Hours	SFA_SHS_INTR_WH	Set Up SACR, Product Related, Financial Aid, College Financing Plan, Interest Rates and Work Hours	Define Interest rates and origination fees for various loan programs; .Income Share Agreement income percentage and months duration; and .Federal Work-Study hours per week to display on the CFP. This applies only to AY 2021 and later.

Setting Up Group Options

Access the Group Options page (**Setup SACR**, and then **Product Related**, and then **Financial Aid**, and then **College Financing Plan**, and then **Group Options**).

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

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Field or Control	Description
Copy Group	Click this button to open the **Group Copy** window. You can use this window to copy existing groups for modification and then saving as a new **College Financing Plan Group**. **Note:** You can't copy groups from AY 2020 and earlier because of the changes to the setup between AY 2020 and 2021.
Do Not Copy	Select this option to prevent the group from being copied during the Aid Year Rollover process.
Group Description	Enter a description for this group.
Academic Career	Select a career to associate to the group. This value is used when retrieving budget and award information.

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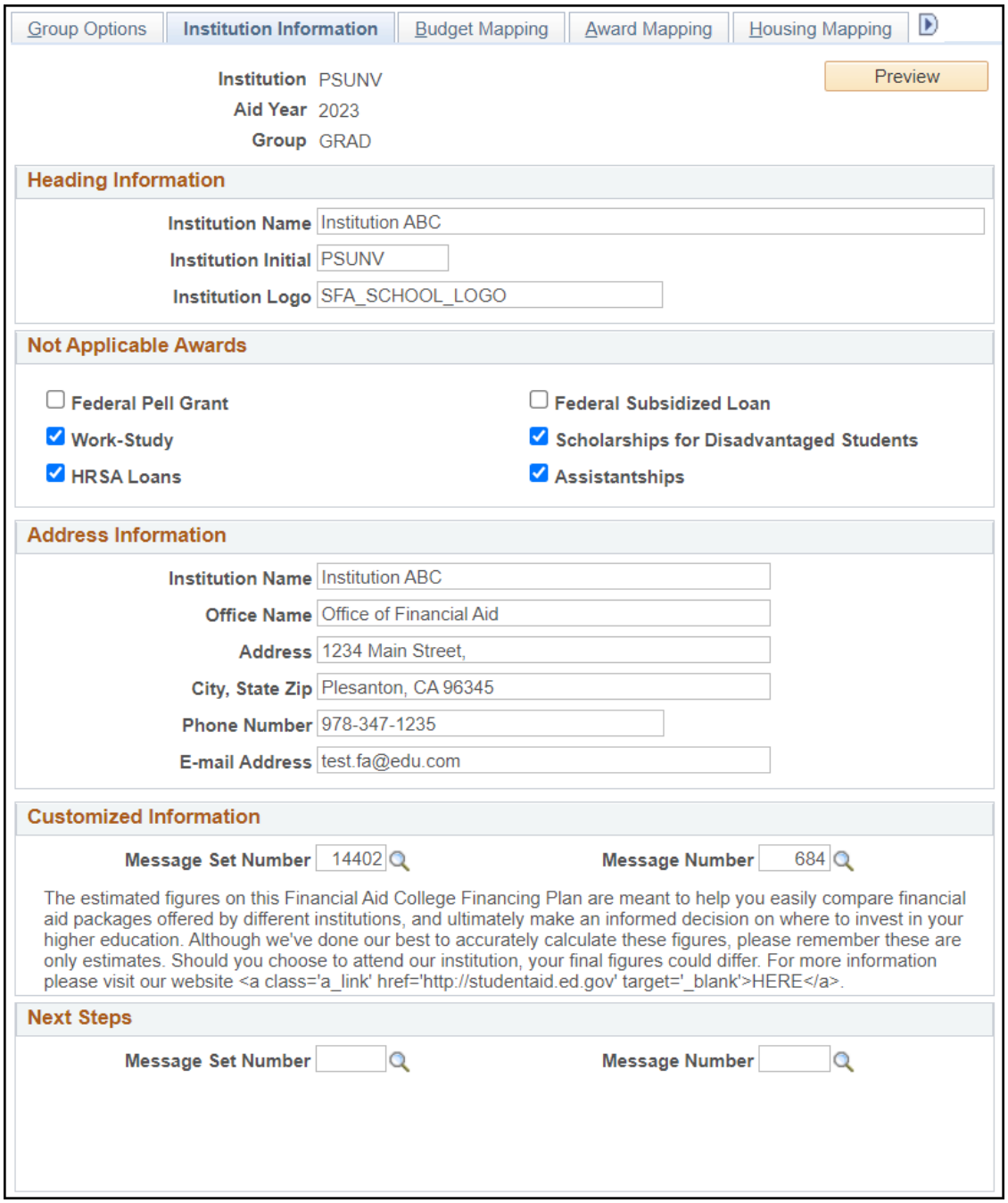
Field or Control	Description
EFC/SAI Option (Expected Family Contribution Option)	Select: • For 2023-2024 and prior Aid Years, *Federal* to display the prorated EFC (PRORATED_EFC) based on Federal Methodology (FM). • For 2024-2025 and future Aid Years, *Federal* to display the SAI based on Federal Methodology (FM). • *Institutional* to display the institutional EFC (INST_EFC) based on Institutional Methodology (IM). • *Both* to display both FM EFCs/SAIs and IM EFCs. This option is available only for AY 2021 and later.
Award Period	Select an award period to associate to the group. This value is used when retrieving budget and award information. If you select “Both”, data from both the ‘Academic’ and ‘Non Standard’ Award Periods are included in one College Financing Plan.
Self Service Link Label	Enter the text you want to display as the Financial Aid Self Service link to the College Financing Plan. “College Financing Plan” is the default text.
CFP Template (college financing plan template)	Select the template you want to use for this group: • Graduate • Undergraduate
Default ED Template Color (default united states department of education template color)	Displays the default hexadecimal format color code used by the United States Department of Education.
Override Template Color	Enter a hexadecimal format color code if you want to override the default.
Hide Download Button	Select to disable the user's ability to download an XML version of their CFP data.
Allow display with no awards	Select this check box if you want the College Financing Plan link to be available to students in Self Service even if the student doesn't have any qualifying awards for the Institution and Aid Year. **Note:** This option helps institutions comply with the expectations within Principles of Excellence in Executive Order 13607 which states that educational institutions provide meaningful information to service members, veterans, spouses, and other family members about the financial cost (budget) and quality (institutional metrics) of educational institutions. Although the student may not have any awards, it is assumed that they would have a cost of attendance budget assigned which is used to create the College Financing Plan based on the Budget Mapping options.

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Setting Up Institution Information

Access the Institution Information page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **College Financing Plan**, and then **Institution Information**).

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



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Field or Control	Description
Preview	Click this button to verify the display of your institutions data and template color selection only. Student specific fields display generic values. Every setup value on this page is pulled in during Preview. **Note:** You may need modify data elements if they extend beyond their designated line.

Header Information

Field or Control	Description
Institution Name	Enter the name of the Institution as you want it to appear in the header of the College Financing Plan.
Institution Initial	Enter a short descriptor for the institution (for example, PSUNV). This data is displayed in the header and Median Borrowing sections of the College Financing Plan.
Institution Logo	Enter the object name of your institution's logo. The logo you want to use must be imported into your database as an image file measuring approximately 65 by 65 pixels. You may need to consult your technical staff on making the object available for this setup.

Not Applicable Awards

Select the award groups for which you wish to display “N/A”. ED states that you cannot remove award groups from appearing on the College Financing Plan, but can display N/A for certain award groups when necessary.

For example, you may use these options if the population to which you are assigning the College Financing Plan isn't eligible for this type of award, or if your school doesn't participate in this particular award program. Displaying “N/A” instead of “$0” may help avoid confusion.

> **Note**
>
> If you choose to display “N/A” for an award group, you may want to explain why the awards are not available in the Customized Information Message.

Institutional Metrics

> **Note**
>
> This region isn’t applicable to AY 2021 and later.

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Enter the values provided by ED on the Institution Metric Data spreadsheet. The values entered here control how the data and graphs are rendered within the Institutional Metrics section on the right side of the Shopping Sheet.

Field or Control	Description
Institution Group	Enter the **Institution Group** value as provided by ED. The value entered here determines what message is displayed in the **Graduation Rate** section on the Shopping Sheet. Valid values are: • *1 - Primarily bachelor's degree granting* • *2 - Primarily associate's degree granting* • *3 - Primarily certificate granting* • *4 - Primarily graduate degree granting* • *5 - Primarily non-degree granting*
Cohort Year	Enter your **Cohort Year** value as provided by ED. This value is used in the message of the **Graduation Rate** section when a -2, -3 or -4 **Graduation Rate** is indicated.
No Graduation Rate Data	Select this check box if your Institution Graduation Rate value provided by ED is blank. **Note:** Do not select this check box if your Graduation Rate is zero (0). Zero is a valid value and should be entered in the Graduation Rate field. If this check box is selected: • The Graduation Rate and Graduation Rate Level fields on this page are not available for setup. • The Graduation Rate section of the Shopping Sheet indicates that no data is available.
Graduation Rate	Enter your **Graduation Rate** value as provided by ED. ED has also issued four valid negative values (-2, -3, -4, and -5). If a negative value is entered here: • The **Graduation Rate Level** field on this page is not available. • The message/bar graph in the **Graduation Rate** section of the Shopping Sheet is changed to indicate no data is available.
Graduation Rate Level	Select the correct **Graduation Rate Level** based on the values provided by ED.
Collection Year	This field is only available if the Graduation Rate is -5. Enter your Collection Year value as provided by ED. This value is used in the message of the Graduation Rate section when a -5 graduation rate is indicated.

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Field or Control	Description
No Loan Default Data	Select this check box if your **Institution Loan Default Rate** value provided by ED is blank. Do *not* select this check box if your Loan Default Rate is zero (0). Zero is a valid value and should be entered in the **Institution Loan Default Rate** field. If this check box is selected: • The **Institution Loan Default Rate** and **National Loan Default Rate** fields on this page are not available. • The message/graph in the Loan Default Rate section of the Shopping Sheet are changed to indicate that no data is available. **Note: No Loan Default Data**, **Institution Loan Default Rate**, and **Institution Loan Default Rate** are only applicable to 2016–2017 and prior Aid Years.
Institution Loan Default Rate	Enter your **Institution Loan Default Rate** value as provided by ED.
National Loan Default Rate	Enter the **National Loan Default Rate** value as provided by ED.
No Repayment Rate Data	Select this check box if your Institution Repayment Rate value provided by ED is blank. Do not select this check box if your Repayment Rate is zero (0). Zero is a valid value and should be entered in the Institution Repayment Rate field. If this check box is selected: • The **Institution Repayment Rate** field on this page are not available. The **National Repayment Rate** field is still available and should be populated. • The message/graph in the Repayment Rate section of the Shopping Sheet are changed to indicate that no data is available. **Note:** The **No Repayment Rate Data**, **Institution Repayment Rate**, and **National Repayment Rate** are only applicable to the 2017–2018 Air Year and forward.
Institution Repayment Rate	Enter your Institution Repayment Rate value as provided by ED.
National Repayment Rate	Enter your National Repayment Rate value as provided by ED.
No Median Borrowing Data	Select this check box if your **Average Borrowed Amount** value provided by ED is blank. If this check box is selected: • The **Average Borrowed Amount** and **Average Monthly Payment** fields on this page are not available. • The message in the Median Borrowing section of the Shopping Sheet is changed to indicate that no data is available.
Average Borrowed Amount	Enter your **Average Borrowed Amount** value as provided by ED.

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Field or Control	Description
Average Monthly Payment	Enter your **Average Monthly Payment** value as provided by ED. ED provides a value with 2 decimal places, but has indicated that rounding to the nearest whole dollar is acceptable.

Address Information

Enter your institution's address and contact information.

> **Note**
>
> The fields in this section allow for large entries which can distort the appearance of the College Financing Plan. Click the **Preview** button at the top of the page to ensure your school's data displays correctly.

Customized Information

Use the Message Catalog to create custom messages to display.

Customized Information appears under the heading “Customized Information” on the CFP output. For AY2020 and earlier, the default message uses **Message Set Number 14402** and **Message Number 410**. For AY 2021 and later, it’s **Message Set Number 14402** and **Message Number 684**.

For AY 2021 and later, the institution name is taken from the **Institution Initial** field, so the heading reads “Customized Information from <*Institution Name*>” on the CFP output.

The default message includes an example of how you can include links in your custom message to lead students to additional information.

Customized Message 2 appears under the heading “Next steps.” Oracle doesn’t provide any default message.

If you don’t use a Message Set Number/Message Number, this section doesn’t print any text when the College Financing Plan is generated.

See *PeopleTools: System and Server Administration*, Using PeopleTools Utilities, Using Administration Utilities, Message Catalog.

Next Steps

Use the Message Catalog to create custom messages to display.

Next Steps appears under the heading “Next steps.” Oracle doesn’t provide any default message.

If you don’t use a Message Set Number/Message Number, this section doesn’t print any text when the College Financing Plan is generated.

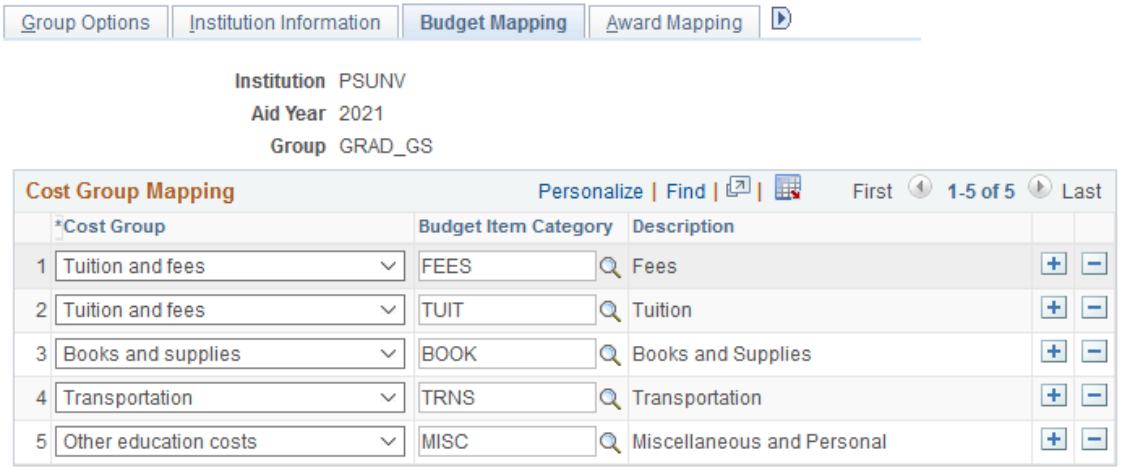
See *PeopleTools: System and Server Administration*, Using PeopleTools Utilities, Using Administration Utilities, Message Catalog.

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Setting Up Budget Mapping

Access the Budget Mapping page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **College Financing Plan**, and then **Budget Mapping**).

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



Map your **Budget Item Category** to the appropriate **Cost Group**. You can map multiple **Budget Item Categories** to a single **Cost Group**, but you can only use a **Budget Item Category** once.

When a College Financing Plan is generated for a student, the system reviews the student's current budget data for the given **Institution**, **Aid Year**, **Academic Career**, **Award Period**, and **Budget Item Category**. Any matching values are used to calculate totals displayed in each cost group.

For AY 2021 and later, you can map the cost group for housing and meals on the Housing Mapping page. See Mapping Housing.

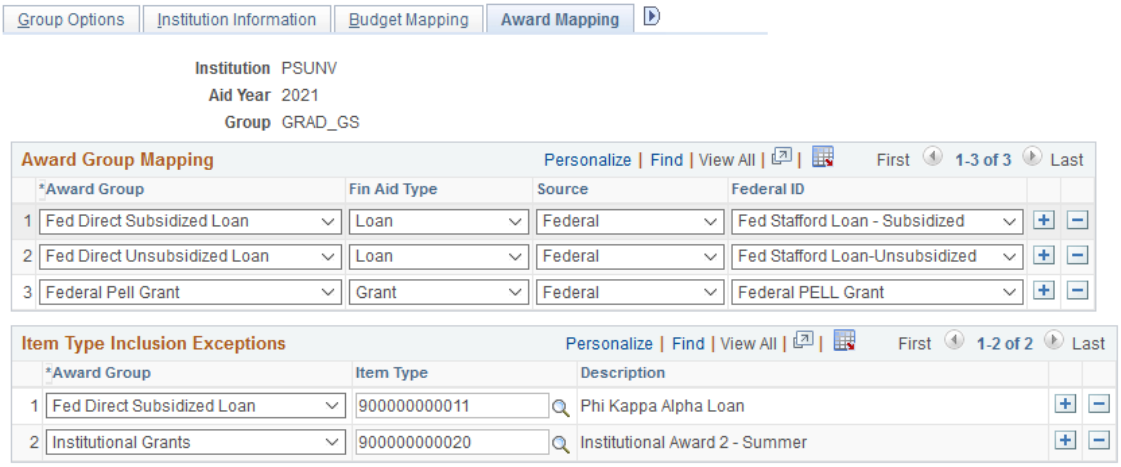
> **Note**
>
> If your students have access to Cost of Education information in Financial Aid Self Service, you should attempt to map the Cost Groups so they match the Cost of Attendance self-service information.

Setting Up Award Mapping

Access the Award Mapping page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **College Financing Plan**, and then **Award Mapping**).

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

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> **Note**
>
> To match the existing self service functionality, only those Financial Aid item types that have a Print Option of “P” (Print) are used to calculate the award group totals. Although the setup page allows you to map individual item types that have a Print Option *not* equal to “P”, these item types are ignored when calculating the award totals.

Award Group Mapping

Map your **Fin Aid Type**, **Source**, and **Federal ID** (when applicable) to the appropriate **Award Group**. You can map multiple **Fin Aid Type**, **Source**, and **Federal ID** combinations to a single **Award Group**.

When a College Financing Plan is generated for a student, the system reviews the student's current award data for the given **Institution**, **Aid Year**, **Academic Career**, **Award Period**, **Fin Aid Type**, **Source**, and **Federal ID**. Any matching values are used to calculate totals displayed in each award group.

For AY 2021 and later, award groups have been expanded.

When students view their College Financing Plan, grants and scholarships are displayed separately.

> **Note**
>
> If your students have access to Award information in Financial Aid Self Service, you should attempt to map the Award Groups so they match the Award Self Service information.

Item Type Inclusion Exceptions

Use this setup to include additional item types in award groups that are not included in **Award Group Mapping**.

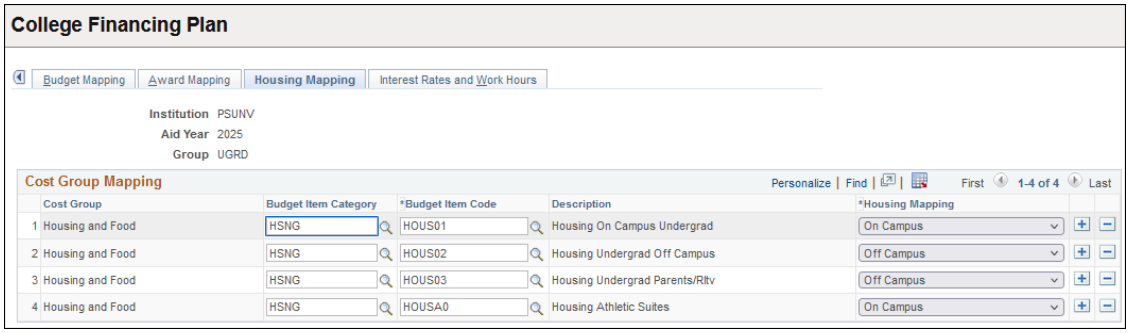
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Select an **Award Group** in which you want to include a specific **Item Type**, and then choose the **Item Type** you want to include. You can include multiple item types in the same award group, but you can only include an item type once across all award groups.

Mapping Housing

Access the Housing Mapping page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **College Financing Plan**, and then **Housing Mapping**).

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



> **Note**
>
> This page is available only for AY 2021 and later.

Use this page to provide a breakdown of your housing and meals budget that's either on or off campus.

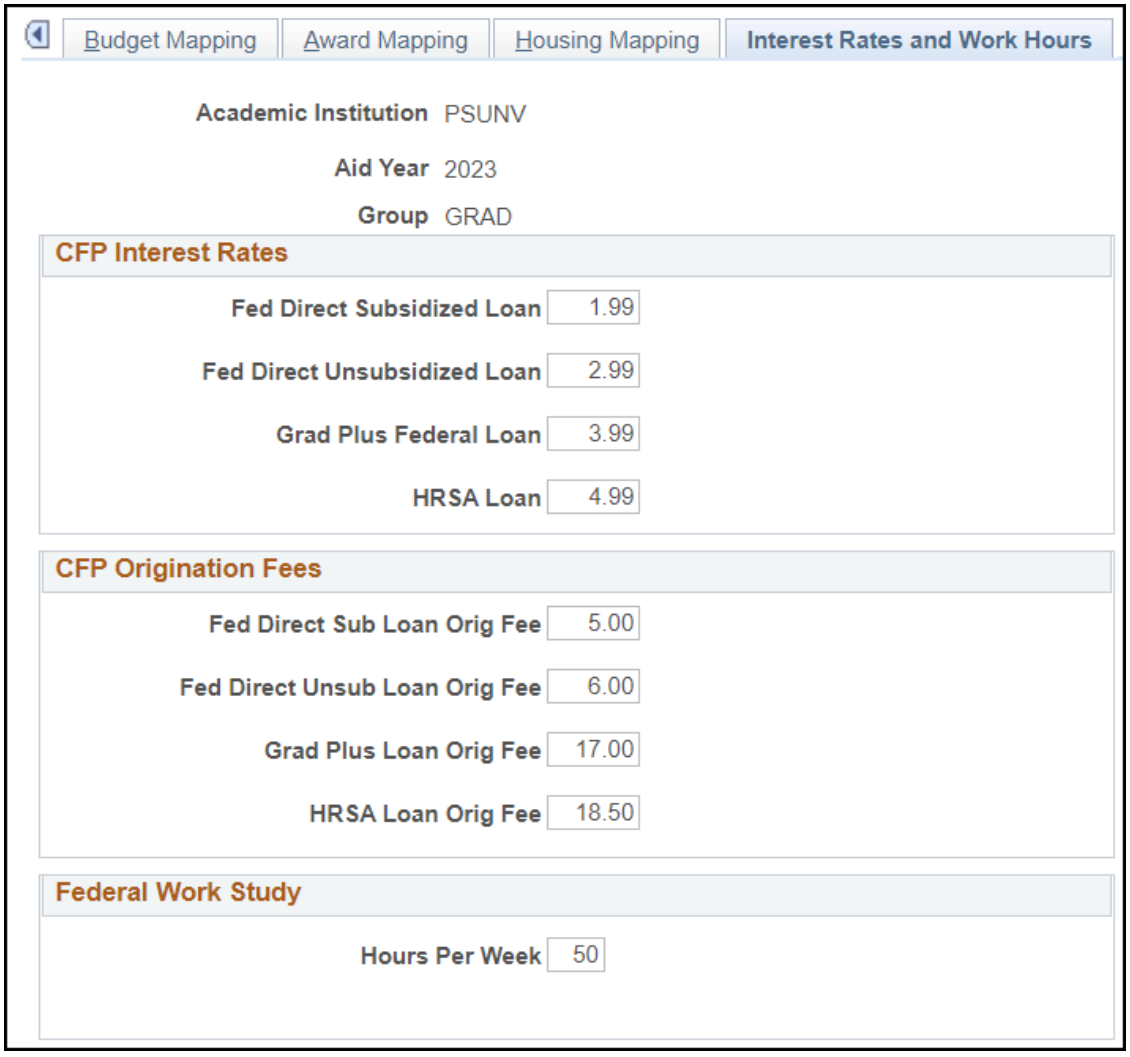
Unlike the Budget Mapping page where you can only use a budget item category once, on this page you can add multiple mappings of the same cost group and budget item category. For each cost group and budget item category mapping, define the budget item code you want to associate to it as well as identify whether the mapping is on or off campus.

Defining Interest Rates and Work Hours

Access the Interest Rates and Work Hours page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **College Financing Plan**, and then **Interest Rates and Work Hours**).

This example illustrates the fields and controls on the Interest Rates and Work Hours page. You can find definitions for the fields and controls later on this page.

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> **Note**
>
> This page applies only to AY 2021 and later.

Use this page to define:

- Interest rates and origination fees for various loan programs.
- Income Share Agreement income percentage and months duration.
- Federal Work-Study hours per week.

These values appear in Loan Options and Work Options on the College Financing Plan. If you don’t enter a value in a field, the value that appears on the College Financing Plan is ‘0’.

Assigning College Financing Plan Groups

In Self Service, the College Financing Plan link appears depending on how you set up the student's College Financing Plan group. The student’s group can be assigned and viewed on the Packaging Status Summary page. If a student is assigned a College Financing Plan group,

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has Award Detail security for Self Service, and has been awarded, the College Financing Plan link appears in Self Service.

You can also use the Population Update process to assign groups in batch. When using Population Update, use the Record (Table) Name of STDNT_AID_ATRBT and field name of “College Financing Plan Group”.

You may want to remove students’ access to their College Financing Plan, for example, when they have accepted or declined awards. To remove students’ access to their College Financing Plan, go to the Packaging Status Summary page, make the College Financing Plan Group field equal to blank, and save. You can also use the Population Update process to set the Shopping College Financing Plan to blank.

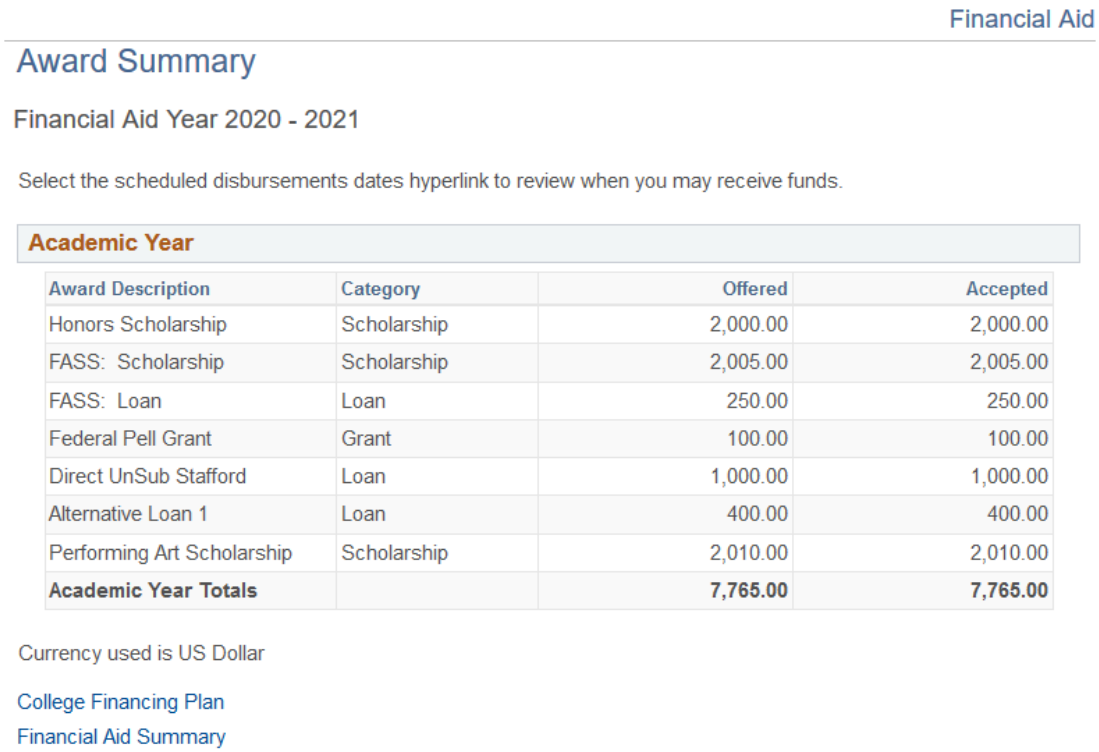
See Reviewing the Packaging Status Summary Page.

See Campus Community Fundamentals: Running the Population Update Process.

Viewing the College Financing Plan

Access the Financial Aid Self Service Award Summary page (**Campus Community**, and then **Student Services Center**, and then **View Financial Aid link**, and then **20XX (award year) link**, and then **College Financing Plan link**).

This example illustrates the fields and controls on the Self Service with College Financing Plan Link Example.



Financial Aid

Award Summary

Financial Aid Year 2020 - 2021

Select the scheduled disbursements dates hyperlink to review when you may receive funds.

Academic Year

Award Description	Category	Offered	Accepted
Honors Scholarship	Scholarship	2,000.00	2,000.00
FASS: Scholarship	Scholarship	2,005.00	2,005.00
FASS: Loan	Loan	250.00	250.00
Federal Pell Grant	Grant	100.00	100.00
Direct UnSub Stafford	Loan	1,000.00	1,000.00
Alternative Loan 1	Loan	400.00	400.00
Performing Art Scholarship	Scholarship	2,010.00	2,010.00
Academic Year Totals		**7,765.00**	**7,765.00**

Currency used is US Dollar

College Financing Plan

Financial Aid Summary

The College Financing Plan link is available to students on the Financial Aid Award Summary page in Financial Aid Self Service. Display of the Financial Aid Award Summary page is controlled by the Financial Aid Self Service Inquiry Options. On the **Inquiry Options** page in the Display Data group box, the **Award Detail** check box must be selected for students to have access to the Financial Aid Award Summary page, and, therefore, their College Financing

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Plans. The College Financing Plan link appears whether you choose to display Award Detail by Aid Year or Award Period.

> **Note**
>
> The College Financing Plan link displays in this same location if you choose the 'Allow display with no awards' option on the Group Options page.

> **Note**
>
> Students must have a College Financing Plan group assigned to have a College Financing Plan to link to from Financial Aid Self Service.

Field or Control	Description
Download	Click this button to open a new window and view some of the values from the College Financing Plan in XML format.

Here's an example of a CFP XML download:

```
<college financing plan>
<total_cost_of_attendance>
<tuition_and_fees>$12,700</tuition_and_fees>
<housing_and_meals_on_campus>$7,000</housing_and_meals_on_campus>
<housing_and_meals_off_campus>$</housing_and_meals_off_campus>
<books_and_supplies>$800</books_and_supplies>
<transportation>$1,600</transportation>
<other_education_costs>$600</other_education_costs>
<estimated_costs_on_campus>$22,700</estimated_costs_on_campus>
<estimated_costs_off_campus>$</estimated_costs_off_campus>
</total_cost_of_attendance>
<expected_family_contribution>
<based_on_fafsa>0</based_on_fafsa>
<based_on_institutional_methodology>$0</based_on_institutional_methodology>
</expected_family_contribution>
<scholarships>
<scholarships_from_your_school>$250</scholarships_from_your_school>
<scholarships_from_your_state>$150</scholarships_from_your_state>
<other_scholarships>$350</other_scholarships>
<employer_paid_tuition_benefits>$450</employer_paid_tuition_benefits>
<total_scholarships>$1,200</total_scholarships>
</scholarships>
<grants>
<federal_pell_grants>$1,050</federal_pell_grants>
<institutional_grants>$1,250</institutional_grants>
<state_grants>$2,500</state_grants>
<other_forms_of_grant_aid>$0</other_forms_of_grant_aid>
<total_grants>$4,800</total_grants>
</grants>
<va-education-benefit>$3,000</va-education-benefit>
<net_price>$13,700</net_price>
```


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```
<loan_options>
<federal_direct_subsidized_loan>$2,050</federal_direct_subsidized_loan>
<federal_direct_subsidized_loan_interest_rate>1.99%</
federal_direct_subsidized_loan_interest_rate>
<federal_direct_subsidized_loan_origination_fee>5%</
federal_direct_subsidized_loan_origination_fee>
<federal_direct_unsubsidized_loan>$2,150</federal_direct_unsubsidized_loan>
<federal_direct_unsubsidized_loan_interest_rate>2.99%</
federal_direct_unsubsidized_loan_interest_rate>
<federal_direct_unsubsidized_loan_origination_fee>6%</
federal_direct_unsubsidized_loan_origination_fee>
<total_loan_options>4,200</total_loan_options>
</loan_options>
<work_options>
<work_study>$75</work_study>
<work_study_hours>25 /wk</work_study_hours>
<other_campus_job>$85</other_campus_job>
<total_work_options>$160</total_work_options>
</work_options>
</college financing plan>
```

See Assigning College Financing Plan Groups.

See Campus Self Service: Understanding Financial Aid Self-Service.

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36

Processing CommonLine Loans

Understanding CommonLine Loan Processing

This section discusses CommonLine loan process flow.

CommonLine Loan Outbound Process Flow

To process Federal Family Education Loan Program (FFELP) and alternative loans, the Campus Solutions system supports both versions of CommonLine, the newer Common Record CommonLine (CRC) and the older CommonLine 4 (CL 4). You use the CommonLine version supported by your lenders, guarantors, and loan servicers; you can process CRC and CL 4 loans separately or simultaneously.

The outbound business processing flow for CommonLine FFELP and alternative loans using either CRC or CL 4 is as follows.

1. Student accepts the loan offer made on their financial aid package.
2. The Loan Origination process detects the student's newly accepted loan and calculates application information such as total loan amount, loan period, disbursement amounts and dates, loan servicer, processing type, and whether to process as a CRC or CL 4 loan. The calculated information is stored on the loan origination application tables.

   > **Note**
   >
   > If a Promissory Note is submitted to the school before the loan is originated, the information is used during origination.

3. After origination is complete, Loan Validation process is run to check the loan application for data discrepancies. Loans failing validation are reprocessed in subsequent runs until validation is reached.
4. The CommonLine Loan Outbound process moves validated loans into outbound staging tables.
5. The Application File Creation process creates loan application files from the staging table information. CRC generates files in XML format and CL 4 uses ASCII files.

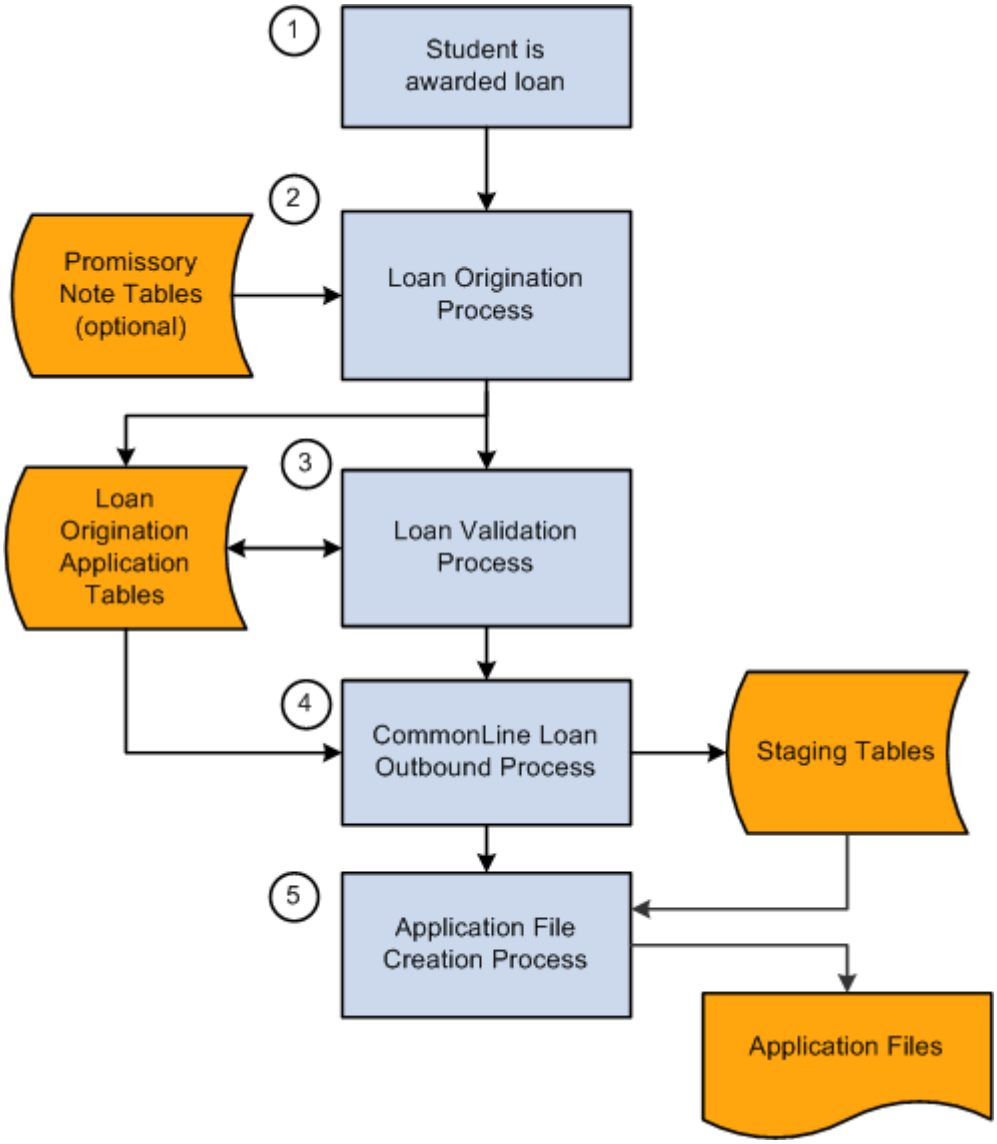
The system does not provide a method for electronically transmitting CommonLine files to their destinations as each loan servicer might require a specific method to be used, such as FTP or a Web interface.

The application files you submit to the loan servicers are processed and you are notified using receipt of response files for each loan processed.

The following illustration shows the flow of CommonLine loan processing:

Loan origination outbound process

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Although the CommonLine Loan Outbound business process flow is the same for CRC and CL 4, several processing steps require a separate programs for CRC and CL4. The following table indicates where the separate processes exist.

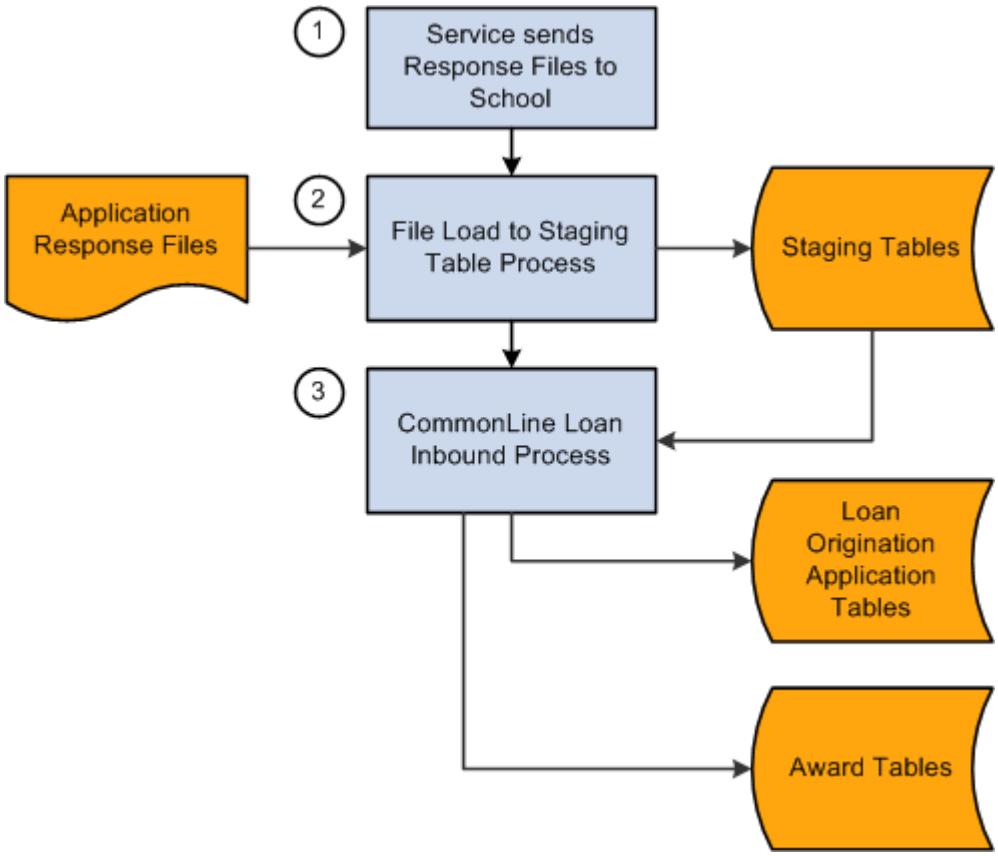
Business Process	Common Record CommonLine	CommonLine 4
Loan validation	CRC validation (Equation Engine)	CL 4 validation (Equation Engine)
CommonLine Loan Outbound	CRC outbound staging (FAPCLOUT)	CommonLine 4 outbound (FAPLCOD4)
Application File Creation	CRC XML outbound (SFA_CRC_OUT)	Outbound EC agent (EDI Manager)

Inbound File Processing

Inbound file processing:

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Inbound Processing



Managing Promissory Notes

Schools may choose to collect promissory notes from their students as a condition to process their loan. Campus Solutions components enable schools to enter promissory note information to be used by the loan origination process before the loan is originated. Information from the promissory note pages is used by the origination process to determine the loan destination, process level, and MPN serial loan status. After a loan is originated for a student, all promissory notes entered for the same loan type cannot be used for new loans. Both CRC and CL4 versions use the same components and pages for tracking promissory notes.

This section provides an overview and discusses how to:

- Enter Stafford promissory note data.
- Review biographical and demographic data.
- Review promissory note action status.
- Enter PLUS promissory note data.
- Create loan reference and cosigner relationships.
- Enter alternative loan promissory note data.
- Track CommonLine master promissory note usage.

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Pages Used to Manage Promissory Notes

Page Name	Definition Name	Navigation	Usage
CommonLine PNote - Stafford (CommonLine promissory note - Stafford)	SFA_CRC_PNOTE_STAF	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter Stafford Prom Notes**, and then **CommonLine PNote - Stafford**	Enter promissory note data for Stafford loans before loan origination. The system uses this data for origination.
Origination Detail	LN_CL_PNOTE_PD_SEC	Click the **Student Data** link on the CommonLine PNote - Stafford page. Click the **Student Data** link on the Promissory Note Plus page. Click the **Student Data** link on the Promissory Note Alt page.	View the student's current biographical and demographic data.
Loan PNote Action Status (loan promissory note action status)	SFA_CRC_PN_ACTION	Click the **Pnote Status** link on the CommonLine Pnote - Stafford page. Click the **Pnote Status Data** link on the Promissory Note Plus page. Click the **Pnote Status** link on the Promissory Note Alt page.	View or update loan promissory note action status.
Promissory Note Plus	SFA_CRC_PNOTE_PLUS	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter PLUS Prom Notes**, and then **Promissory Note Plus**	Enter promissory note data for PLUS loans before loan origination. The system uses this data for origination.
Loan Relation (Ref/ Cosign) (loan relation [reference/cosigner])	SFA_CRC_PN_RELATN	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter PLUS Prom Notes**, and then **Loan Relation (Ref/Cosign)**	Assign co-signers, co-maker, or references to a promissory note.
Relationships	RELATIONSHIPS	Click the **Related IDs** link on the Loan Relation (Ref/Cosign) page.	Identify and create relationships between people or IDs in the system.
Current Address Information	LN_ORIG_REL_ADDR	Click the **Current Address** link on the Loan Relation (Ref/ Cosign) page.	View the co-signer's, co-maker's or reference's current address.

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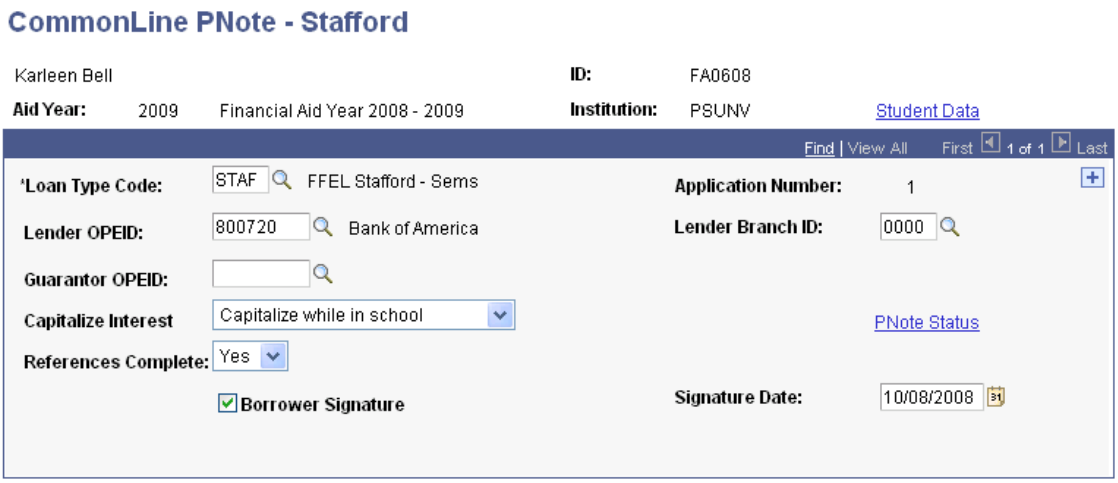
Page Name	Definition Name	Navigation	Usage
Current Employment Information	LN_ORIG_REL_EMPL1	Click the **Current Employment Information** link on the Loan Relation (Ref/Cosign) page.	View or enter the co-signer's, co-maker's or reference's employment information. Only available when **Loan Relation Type** and **Relationship Nbr** fields are populated.
Current Income Information	LN_ORIG_REL_INCOME	Click the **Current Income Information** link on the Loan Relation (Ref/Cosign) page.	View or enter the cosigner's or reference's income. Only available when **Loan Relation Type** and **Relationship Nbr** fields are populated.
Previous Employment Information	LN_ORIG_REL_EMPL2	Click the **Previous Employment Information** link on the Loan Relation (Ref/Cosign) page.	View or enter the cosigner's or reference's previous employment. Only available when **Loan Relation Type** and **Relationship Nbr** fields are populated.
Promissory Note Alt	SFA_CRC_PNOTE_ALT	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter ALT Loan Prom Notes**, and then **CRC Promissory Note Alt**, and then **Promissory Note Alt**	Enter promissory note data for alternative loans.
Student MPN Usage (CommonLine master promissory note usage)	LN_CL_MPN_USE	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Student MPN Usage**, and then **CommonLine MPN Usage**, and then **Student MPN Usage**	View Stafford and PLUS serial master promissory note history. You can also use this page to require a student to sign a new note for each new Stafford or PLUS loan.

Entering Stafford Promissory Note Data

Access the CommonLine PNote Stafford page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter Stafford Prom Notes**, and then **CommonLine PNote - Stafford**).

This example illustrates the fields and controls on the CommonLine PNote - Stafford page. You can find definitions for the fields and controls later on this page.

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This page is used primarily by schools who use the Guarantee Only process level. Because the school has collected the promissory note, the guarantor can immediately approve the loan upon receipt of the loan application.

Field or Control	Description
Loan Type Code	Select from the appropriate Stafford loan types that your institution has set up in the Loan Type Table page.

Field or Control	Description
Lender OPEID (lender office of postsecondary education identifier)	Select the lender requested by the borrower on the promissory note. If the promissory note is present for the loan when origination runs, the system uses the lender and guarantor OPEIDs to determine the appropriate loan destination. When you move out of the **Lender OPEID** and **Guarantor OPEID** fields, the system displays the name of the agency.
Lender Branch ID	Select the lender branch identification.
Guarantor OPEID (guarantor office of postsecondary education identifier)	Select the guarantor requested by the borrower on the promissory note.
Capitalize Interest	Select either*Capitalize while in school* or *Pay interest while in school.*
Borrower Signature	Select if the borrower signed a valid promissory note.
Signature Date	Enter the date the borrower signed the note.
Student Data	Click to access the Origination Detail page to view the student's current biographical and demographic data.
PNote Status	Click to access the Loan Pnote Action Status page to view or update loan promissory note status.

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Reviewing Biographical and Demographic Data

Access the Origination Detail page (click the **Student Data** link on the CommonLine PNote - Stafford page, Promissory Note Plus page, or Promissory Note Alt page).

View the student's current address, driver's license number, and email address.

> **Note**
>
> The page displays current student information. This information may change when the student's loan is processed.

Reviewing Promissory Note Action Status

Access the Loan Pnote Action Status page (click the **Pnote Status** link on the CommonLine Pnote - Stafford page, the Promissory Note Plus page, or the Promissory Note Alt page).

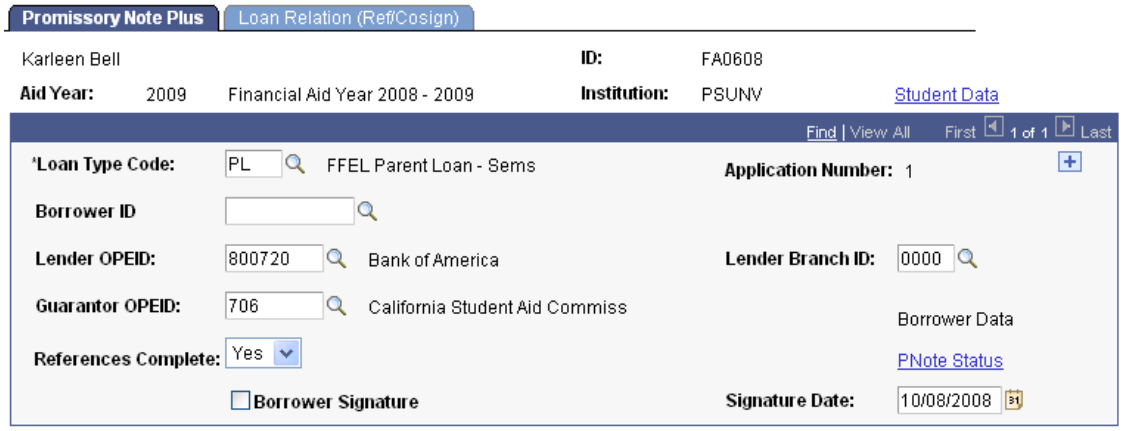
Field or Control	Description
Loan Action Cd (loan action code)	This value is set automatically as the promissory note is processed, but you can override it. Select from: *E:* Select this value after you receive the promissory note. This value is automatically set when the promissory note is first entered. *I:* Select this value when the promissory note is set to inactive. Set this value manually to cancel the use of the promissory note. *O:* Select this value when the promissory note is used for origination. This value is automatically set when the promissory note is used during origination.
Date Received	Record the date when you actually received the promissory note. When you enter a promissory note, the system sets the date with today's date.

Entering PLUS Promissory Note Data

Access the Promissory Note Plus page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter PLUS Prom Notes**, and then **Promissory Note Plus**).

This example illustrates the fields and controls on the Promissory Note Plus page. You can find definitions for the fields and controls later on this page.

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This page is used primarily by schools who use the Guarantee Only process level. Because the school has collected the promissory note, the guarantor can immediately approve the loan upon receipt of the loan application.

Field or Control	Description
Loan Type Code	Select from the appropriate PLUS loan types that your institution has set up in the Loan Type Table page.
Borrower ID	Select the appropriate parent or guardian of the student. The information in the **Borrower ID** field can be changed until the Loan Origination process uses the promissory note data. The **Borrower ID** field becomes unavailable once the Loan Origination process uses the promissory note data. To verify if the Loan Origination process has used the Pnote data, navigate to the Loan Pnote Action Status page by clicking the *Pnote Status* link. **Note:** Only people related to the student are available. To be an eligible borrower of a student's loan, a relationship with a guardian or parent must be created. Relationships are defined on the Relationships page. To create a relationship to the student, the related person must have an ID assigned, and the guardian status must be set to *Parent, Guardian,* or *Self.* **Note:** Borrower ID does not display for Grad PLUS promissory notes. The **Borrower ID** is set to *EmplID* internally to avoid defining a student-to-student borrower relationship.
Lender OPEID (lender office of postsecondary education identifier) and	Select the lender requested by the borrower on the promissory note. If the promissory note is present for the loan when origination runs, the system uses the lender and guarantor OPEIDs to determine the appropriate loan destination.
Guarantor OPEID (guarantor office of postsecondary education identifier)	Select the guarantor requested by the borrower on the promissory note.

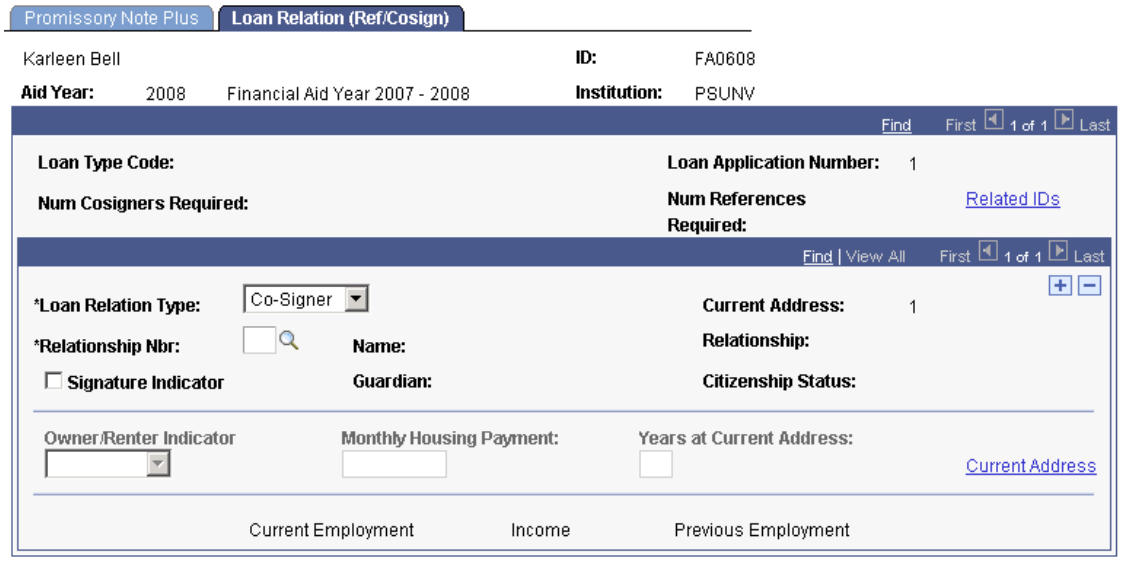
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Field or Control	Description
Borrower Signature	Select if the borrower signed a valid promissory note.
Borrower Data	Click to access the Origination Detail page to review borrower information.
Student Data	Click to access the Origination Detail page to view the student's current biographical and demographic data.
PNote Status	Click to access the Loan Pnote Action Status page to view or update loan promissory note status.
Signature Date	Enter the date the borrower signed the note.

Creating Loan Reference and Cosigner Relationships

Access the Loan Relation (Ref/Cosign) page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter PLUS Prom Notes**, and then **Loan Relation (Ref/Cosign)**).

This example illustrates the fields and controls on the Loan Relation (Ref/Cosign) page. You can find definitions for the fields and controls later on this page.



If cosigners or references are required for the loan type, the system displays the number required. Several of the fields function only when a relationship is identified in the **Relationship Nbr** field and the **Loan Relation Type** is *Co-Signer* or *Co-Maker.*

Field or Control	Description
Loan Relation Type	Select from *Co-Maker*, *Co-Signer,* or *Reference.*

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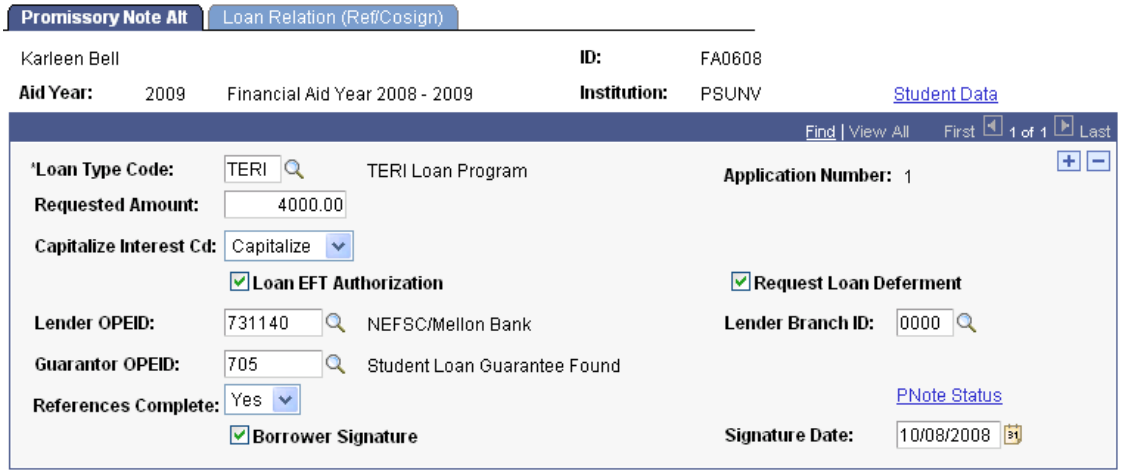
Field or Control	Description
Relationship Nbr (relationship number)	When you select a value for the field, the system displays the name, relation, guardian, and citizenship status. This information comes from the Relationships page.
Signature Indicator	Select to indicate a signed note from the cosigner or reference exists.
Owner/Renter Indicator	Specify if the cosigner or reference owns or rents.
Related IDs	Click to access the Relationships page to identify and create relationships between people. For PLUS loans, the relationship to the student is generally the parent or guardian. For alternative loans, the relationship can be a parent, guardian, or a cosigner. See Campus Community Fundamentals: Relating One Individual to Another.
Current Address	Click to access the Current Address Information page to view the cosigner's or reference's current address.
Current Employment	Only available when **Loan Relation Type** and **Relationship Nbr** fields are populated. Click to access the Current Employment Information page to enter the cosigner's or reference's employment information.
Income	Only available when **Loan Relation Type** and **Relationship Nbr** fields are populated. Click to access the Current Income Information page to enter the cosigner's or reference's income.
Previous Employment	Only available when **Loan Relation Type** and **Relationship Nbr** fields are populated. Click to access the Previous Employment Information page to enter the cosigner's or reference's previous employment.

Entering Alternative Loan Promissory Note Data

Access the Promissory Note Alt page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter ALT Loan Prom Notes**, and then **CRC Promissory Note Alt**, and then **Promissory Note Alt**).

This example illustrates the fields and controls on the Promissory Note Alt page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Loan Type Code	Select from the appropriate Alternative loan types that your institution has set up in the Loan Type Table page.
Requested Amount	Enter the requested loan amount. A loan cannot be originated for greater than the requested amount.
Capitalize Interest Cd (capitalize interest code)	Select from: *Capitalize:* Capitalize interest while in school. *Pay Int:* Pay capitalized interest immediately.
Loan EFT Authorization (loan electronic fund transfer authorization)	Select to indicate that the borrower has authorized the school to transfer the loan proceeds received by EFT to the appropriate student account.
Request Loan Deferment	If eligible, requests to begin repayment of the loan at a later date. Deferment criteria and repayment options are dependent on the particular alternative loan program.
Lender OPEID (lender office of postsecondary education identifier)	Select the lender requested by the borrower on the promissory note. If the promissory note is present for the loan when origination runs, the system uses the lender and guarantor OPEIDs to determine the appropriate loan destination.
Lender Branch ID	Select the lender branch identification.
Guarantor OPEID (guarantor office of postsecondary education identifier)	Select the guarantor requested by the borrower on the promissory note.
References Complete	Select from: *Yes:* Indicates references are complete. *No:* Indicates references are not complete.
Borrower Signature	Select if the borrower signed a valid promissory note.
Signature Date	Enter the date the borrower signed the note.
Student Data	Click to access the Origination Detail page to view the student's current biographical and demographic data.

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Field or Control	Description
PNote Status	Click to access the Loan Pnote Action Status page to view or update loan promissory note status.

Tracking CommonLine Master Promissory Note Usage

Access the Student MPN Usage page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Student MPN Usage**, and then **CommonLine MPN Usage**, and then **Student MPN Usage**).

Use this page to monitor the status of any Stafford or PLUS master promissory notes that have been guaranteed. The loan origination process uses this information to control whether FFEL loans can be processed serially. Information is entered in the page when a Stafford or PLUS loan is guaranteed. Subsequent loans processed for the student and borrower use the information to determine whether the loan can be processed serially.

In most cases, you are not required to monitor or update information for the student. The system automatically populates this page when confirmation of a valid MPN is reported by the service provider on the CommonLine Application Response file. However, when you must enforce a new MPN to be issued for each loan, you can set the **Serial Loan Code** field to *New MPN.* After the value is set, the system does not change this value. This ensures that all new loans that are originated request a new promissory note from the student. Users can also add MPN use information on the page to establish the desired serial loan processing in advance of originating loans for the student.

> **Note**
>
> If your school does not process serial loans for all students, use the Deactivate the Serial Loan Activation option on the Financial Aid Installation page.

Field or Control	Description
Serial Loan Code	When a Stafford loan is originated and is guaranteed, the lender indicates whether it is a serial loan. This field displays the value that was requested when the loan was originated. This value is on the Loan Origination 3 page in the CommonLine Management component.
Lender MPN Confirmation	When the loan response file is received, this field displays what the lender determined. When the system loads the response, it updates the **Lender OPEID** and **Lender MPN Confirmation** fields. Values are: *No:* A valid MPN does not exist for the borrower. *Unknown:* The lender was unable to determine the borrower's serial MPN status. *Yes:* A valid serial MPN exists.

For future loans, the origination program checks this page to verify serial loan status. For example, if a student applies for another Stafford loan a year later, the system can verify if the

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previous loan was a serial loan. If it is a serial loan with the same lender, the system originates the new loan as a serial loan and gives it a new effective date.

You can also manually override the default serial MPN setting. Select *N - Use New MPN* from the Loan Origination 3 page in the CommonLine Management component if you do not want a student to be processed for a serial loan. For example, a serial-MPN-eligible school might always want to generate new MPNs for a specific portion of its borrowers, such as law students. If law students are updated on the page so that the Serial Use field is *N-Use New MPN,* all future loans originated require a new MPN until the **Serial Loan Code** field is reset to *S-Serial, Renew existing MPN.* For PLUS loans, use the loan validation edit to verify that the information for the student, parent, and lender on the page matches that of the originated PLUS loan.

Originating CommonLine Loans

This section provides an overview and discusses how to originate CommonLine loans.

Understanding the Loan Origination Process

Use the loan origination process (FAPLBOG1) to determine student loan eligibility. Eligibility is determined by checking student award information, promissory notes, the student's loan history, and the loan setup parameters used to calculate a new student loan. You can view all originated loans in the Maintain Originated Loans component. During the origination process, key elements are determined to create a complete loan record that can be transmitted to the appropriate lending agency. How these key elements are determined is discussed in this section:

- CommonLine version.
- Process level.
- Serial Loan Code, which supports master promissory note functionality.

Determining the CommonLine Version

The origination process uses loan destination to determine the correct CommonLine version. As described in the Setting Up CommonLine 4 Loans, the origination process determines the assigned lender and guarantor for each loan and then attempts to match the lender or guarantor to an existing CRC loan destination. If found, the system assigns the CL version and destination number to the loan. If not found, then a lender or guarantor match is attempted with the CL 4 loan destinations, and if one is found, the system assigns the CL version and destination number.

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> **Note**
>
> If no destination is found for a loan during the Loan Origination process, the program uses the set up on the Loan Destination Default page (Set up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default) to determine the CL version.
>
> If the **Use CRC Destination** check box is selected on the Loan Destination Default page and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CRC is used.
>
> If the **Use CRC Destination** check box is cleared on the Loan Destination Default page and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CL4 is used.
>
> The exception to this rule is when the Loan Origination program uses CRC Certification Request data to originate a loan (setup is ignored). If CRC Certification Request data is used *and* no destination is found, a CL version of CRC is used.

After the CL version is set, if you assign or change the loan destination number online, you can only select loan destinations that support the assigned CL version. If you change the CL version, the available loan destination numbers change accordingly. After the destination is assigned online, the system automatically sets the process level, disbursement hold and release, and serial MPN settings to match the loan destination settings.

> **Note**
>
> For the CL version and loan destination number to be assigned correctly, ensure the setup of the schools' loan destination is complete and accurate before you originate loans for the aid year.

See Setting Up Loan Origination.

Determining the Process Level

The process level field represents the CommonLine process type code value that is reported to the loan servicer. Each process type and level defines a specific loan business process. The supported CommonLine process types are:

- Guarantee Only (GO)
- Guarantee and Print (GP)
- Print and Guarantee (PG,)
- Certification Request (CR)

The process level is based on how the loan promissory note is collected from the borrower. GO implies that the school has collected the promissory note, while GP and PG requests that the note be generated, if necessary, and collected by the loan servicer. The loan origination process automatically determines the process level to use based on the default process levels assigned for each loan destination.

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> **Note**
>
> Oracle also provides a process level of Manual (M). Assigning along this process level indicates that the loan is being processed manually and should not be reviewed by any of the automated loan processes or generate an electronic application. This process level is used in cases where the loan servicer does not support electronic loan processing, or you are overriding an existing loan and do not want the loan adjustment or outbound processes to review and possibly manipulate the borrower's loan eligibility.

Determining Serial MPN Eligibility

The serial loan code is set for all originated Stafford and PLUS loans and indicates whether the loan is to be processed as part of a multi-year note (serial processing) or if a new note must be collected for the loan. The system displays these fields on the Loan Origination 3 page in the Maintain Originated Loans component and they are reported using the CommonLine Application Send file.

By default, the system sets the serial loan code based on the loan destination setup unless the process can confirm that the student has a prior loan with the same borrower and the lender confirms possession of the MPN form. The system maintains MPN serial confirmation in the Maintain Student MPN Usage component. Use component. If confirmation is successful, the system sets the serial loan code to *S – Serial, Renew existing MPN.* The loan origination process attempts to determine serial eligibility by confirming that the originated loan has the same borrower and student maintained in the Maintain Student MPN Usage component.

If the loan origination process is unable to assign the borrower ID or the loan destination, the process might not be able to verify the loan's serial eligibility:

- If the origination process cannot assign a borrower ID, then the system sets the serial loan code to *N – Use new MPN.*
- If the borrower ID is set, but not the loan destination, the origination process attempts to determine serial loan eligibility by using both the student ID and borrower ID to find MPN information in the Maintain Student MPN Usage component so it can assign a serial loan code value. If a match cannot be made using this criteria, then the system sets the serial loan code to *N – Use new MPN.*

When a loan is originated with missing borrower or loan destination information, you must complete the loan information before it can be validated and transmitted to the servicer. The system attempts to determine the serial loan code field value when the Borrower ID or Loan Destination Nbr field is modified. For PLUS, if the Borrower ID field is changed, the system checks the CommonLine MPN Use table for a PLUS record that matches the student ID, institution, and borrower ID. If a match occurs, the system sets the serial loan code to comply with the matched record in the Maintain Student MPN Usage component. Renew sets the value to *S – Serial, Renew existing MPN.* If no match occurs, the serial loan code is set to *N – Use new MPN.* When the **Loan Destination Nbr** is changed and if the **Borrower ID** field is not blank, the same check occurs.

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> **Note**
>
> The system intentionally does not confirm that the lender in the loan destination matches the lender in the MPN Use record. If you require a student to use a new MPN for each loan, use the Maintain Student MPN Usage component to enforce this requirement. For serial PLUS loans, a loan validation edit ensures that the lender for the loan matches the lender listed in the MPN Use record.

Understanding the Loan Processing Status and Loan Origination Transmission

From the time a loan is originated until it is processed by the loan servicer, the system uses a loan processing status field and a loan transmission status field to monitor the loan status:

- The loan process status field monitors the current internal processing state of the loan. Values are:
  - *Cancelled:* A loan cancellation has been initiated.
  - *Hold:* The loan is on hold and the system suspends all loan processing until the hold is removed.
  - *Offered and Not Accepted:* Used by Direct Loans. Origination Pending: Loan has been originated or reset due to a loan rejection, and waiting loan validation.
  - *In Service:* The loan has been transmitted to the appropriate servicer.
  - *Terminated:* A pre-guarantee loan cancellation has been initiated.
- The loan transmission status field monitors the current transmission state of the loan between the school and the loan servicer. Values are:
  - *Accepted:* The servicer has accepted the loan.
  - *Change Pending Transmission:* An adjustment generated a change transaction that has not been sent to the servicer.
  - *Error:* Not used for CommonLine loans.
  - *Origination Pending Transmission:* An Origination that has not been transmitted to the servicer.
  - *Transmitted:* An origination or change transaction has been sent to the loan servicer.

The two fields are displayed throughout the loan process with different labels on three pages:

Page	Loan Process Status	Loan Transmission Status
Loan Status Summary Information	Loan Process Status	Transmission Status
Loan Orig Status	Ln Proc Stat	Orig Trans Stat
CommonLine Loan Origination Transmission	(Loan Processing Stat	Orig Trans Stat

The following table shows how to interpret the loan status based on the field values:

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Loan Process Status	Loan Transmission Status	Explanation
Origination Pending	Origination Pending Transmission	Set when a loan is originated. The loan is waiting for the validation process to authorize its transmission.
In Service	Transmitted	Set by the CommonLine outbound process. The loan application record is in the staging tables and application files can be created by running the EDI Manager (CL 4) or XML creation (CRC) processes. **Note:** The loan is considered transmitted to the servicer after the data has been sent to the staging tables and not when the school actually transmits the files.
In Service	Accepted	Set by the CommonLine inbound process. The loan has been processed successfully by the loan servicer.
In Service	Change Pending Transmission	Set by the origination process when a previously approved loan is adjusted. The loan is waiting for the loan validation process to authorize its transmission.
Cancelled	Change Pending Transmission	Set by the origination process when a previously approved loan is cancelled. The loan is waiting for the loan validation process to authorize its transmission.
Cancelled	Transmitted	Set by the CommonLine outbound process when a loan cancellation record is processed. The loan application record is in the staging tables and application files can be created by running the EDI Manager (CL 4) or XML creation (CRC) processes.
Hold	Origination Pending Transmission	Set by the CommonLine Inbound process when a loan has been denied by the loan servicer. If the student is eligible for the loan, the user must perform the corrective action and then remove the hold status. This allows the loan to be reprocessed and retransmitted.

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Loan Process Status	Loan Transmission Status	Explanation
Terminated	Origination Pending Transmission	Set by the origination process for a loan that has been cancelled prior to transmission.

Pages Used to Originate CommonLine Loans

Page Name	Definition Name	Navigation	Usage
Loan Origination	RUNCTL_LNORIG	**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**	Originate loan item types that have an accepted award status.
Process List	PMN_PRCSLIST	Click the **Process Monitor** link on the Loan Origination page.	View Process Monitor status and messages generated by the load process.
Process Detail	PMN_PRCSRQSTDETAIL	Click the **Detail** link on the Process List page.	View information on the run status.
Message Log	PMN_BAT_MSGLOG	Click the **Message Log** link on the Process Detail page.	View any messages generated by the selected process.
Explain	PMN_MSG_EXPLAIN	Click the **Explain** button on the Message Log page.	View additional information for the selected Message Log message text entry.

Originating CommonLine Loans

Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**).

Use this page to initiate the Loan Origination process (FAPLBOG1), a COBOL SQL process.

Field or Control	Description
CL Orig Options (CommonLine origination options)	Select from: *Ignore Prom. Notes:* The loan origination process originates the loan whether or not a tracked promissory note exists. *Require Prom. Notes:* The loan is not originated unless a tracked promissory note can be used to originate the loan. *Use Prom. Note:* The system uses the tracked promissory note, but if one is not available, it still originates the loan. This is the default setting. The loan origination process checks for unused promissory notes in the CommonLine Pnote Stafford, CommonLine Pnote PLUS, and CommonLine Pnote Alt pages.

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Field or Control	Description
Adjustments	Select to evaluate and process adjustments to existing loans. The system selects and processes origination adjustments for loans in which information has changed that requires a CommonLine change record to be generated. New loans are also originated when this option is selected.
Use Loan Program	Select the check box to activate the loan program field. Users can restrict the origination process to the selected loan program.

The information that you enter in the **Selection Criteria** group box and the **Student Override** group box is restricted by the institution, aid year, career, and loan program that you selected in the **Control Information** group box.

Field or Control	Description
Last Name FROM and **Last Name TO**	Enter two student last names to originate loans for a range of students. Only students with the selected institution, aid year, career, and loan program (optional) are selected. For example, you could originate loans for students with last names from Atkins to McMurphy. You can enter here only if the Student Override check box is clear.
Student Override and **ID**	Select **Student Override** and an individual student ID to originate loans for a single student or a specific group of students in the selected institution, aid year, career, and loan program (optional). Only students with loans that have a loan award in the *Accepted* status and have remaining loan eligibility are available.

Reviewing Loan Origination Information

This section discusses how to:

- Update borrower information.
- Update loan demographic data.
- Enter loan relationship information.
- Review student loan eligibility.
- Manage FFELP serial loan processing.

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Pages Used to Review Loan Origination Information

Page Name	Definition Name	Navigation	Usage
Loan Origination 1	SFA_CRC_LOAN_ORIG	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 1**	Review and update student and borrower information, CommonLine version, and loan destination processing options.
Loan Demographic Data – THIS APPLICATION ONLY –	LOAN_ORIG_SEC2	Click the **Loan Demographic** link on the Loan Origination 1 page.	View the borrower's demographic data and the student's term and demographic information. Update loan demographic data used at the time the loan was originated.
Loan Relationship Information	LN_RELATE_SEC	Click the **Select Ref/ Csgn** button on the Loan Origination 1 page.	View or create relationships for the student or borrower.
Current Address Information	LN_ORIG_REL_ADDR	Click the **Detail** link next to the Years at Current Address field on the Loan Relationship Information page.	View the borrower's current address.
Employment Information	LN_ORIG_REL_EMPL1	Click the **Current Employment** link on the Loan Relationship Information page.	Review and update current job information if you are generating an Alternative Loan Detail record where this information is required by the loan destination.
Current Income	LN_ORIG_REL_INCOME	Click the **Income** link on the Loan Relationship Information page.	Review and update annual salary, other annual income, and other income sources.
Employment Information	LN_ORIG_REL_EMPL2	Click the **Current Employment** link on the Loan Relationship Information page.	Enter data from a previous employer.
Loan Origination 2	SFA_CRC_LN_ORIG_FN	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 2**	Review and adjust loan start, end, certification, and scheduled disbursement dates.

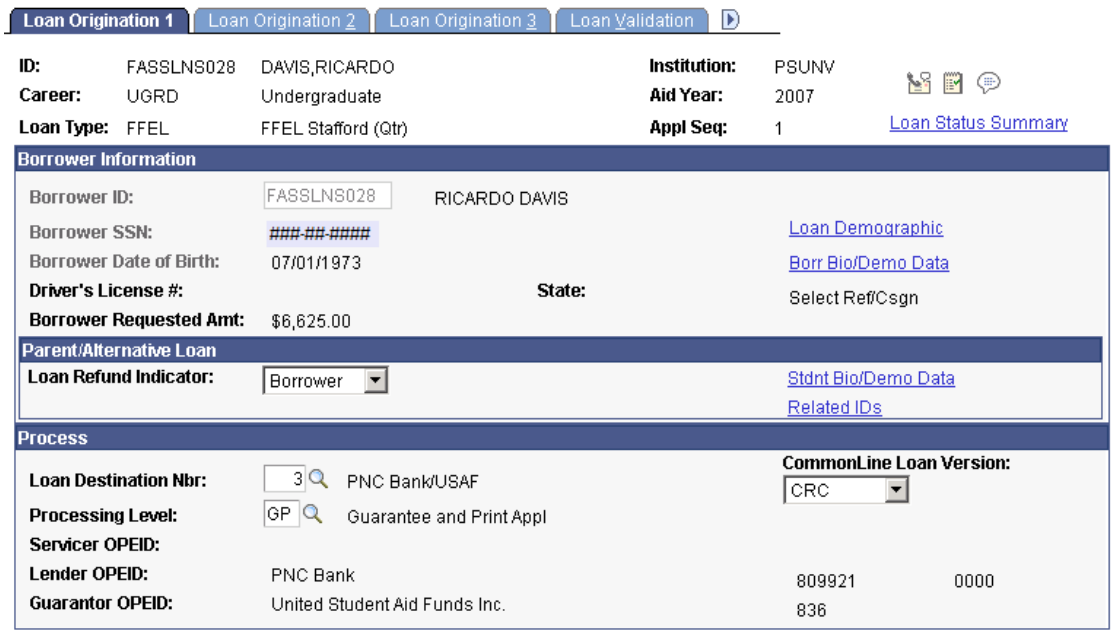
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Page Name	Definition Name	Navigation	Usage
Loan Origination 3	SFA_CRC_LN_ORIG_CL	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 3**	Review and update CommonLine processing options.

Updating Borrower Information

Access the Loan Origination 1 page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 1**).

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



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Borrower Information

Field or Control	Description
Borrower ID	In most cases, the borrower is the student, but in the case of a PLUS loan, the borrower can be a parent or guardian. Select the borrower ID if no ID is present. For Graduate PLUS loans, the Borrower ID is set to the student EmplID internally to avoid defining a student-to-student borrower relationship and cannot be edited on this page. **Note:** Only people related to the student are available. To be an eligible borrower of a student's loan, a relationship with a guardian or parent must be created. Relationships are defined on the Relationships page. To create a relationship to the student, the related person must have an ID assigned, and the guardian status must be set to *Parent, Guardian,* or *Self.*
Driver's License #	The borrower's driver's license number and state. You can update the fields using the **Loan Demographic** link.
Loan Demographic	Click to view the borrower's demographic data and the student's term and demographic information on the Loan Demographic Data page.
Borr Bio/Demo Data (borrower biographic demographic data)	Click to access the Biographical Details page and change the borrower name, gender, citizenship, marital status, date of birth, Social Security Number, and address. The link is active only if the **Borrower ID** field is populated.
Select Ref/Csgn (select references/cosigner)	Click to view or enter data on the Loan Relationship Information page. Available if references and cosigners are required for the loan type.

Parent/Alternative Loan

Information in this group box is used for PLUS and alternative loans.

Field or Control	Description
Loan Refund Indicator	Used for Plus and Alternative loans. Select if loan refunds go to the *Borrower* or to the *Student.* **Note:** Additional refund setup is required in PeopleSoft Student Financials to generate a refund.
Stdnt Bio/Demo Data (student biographic demographic data)	Click to access the Demographic and Address Data page and change the student name, gender, citizenship, marital status, date of birth, Social Security Number, and address. See Campus Community Fundamentals: Understanding Biographical Information.

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Field or Control	Description
Related IDs	Click to open the Relationship page. After a parent or guardian has been assigned an ID, use the Relationship page to link data to that person. The person's ID then appears in the Borrower options on the Loan Origination 1 page and can be selected to process a PLUS loan. See Campus Community Fundamentals: Setting Up Individual Relationships.

Process

Field or Control	Description
Loan Destination Nbr (loan destination number)	Displays the loan destination number that represents the servicers who process the loan. The loan origination process usually assigns this value, but you must assign a loan destination if the origination process cannot. Selecting the appropriate loan destination is dependent on the CommonLine version of the loan. The **CommonLine Loan Version** field value controls the available loan destination records that you can select. When changes occur to the loan destination value, the system resets the loan process level, disbursement hold and release status, and serial loan processing fields to the new loan destination's default values.
Processing Level (process level)	Values are: *CR - School Certification Request:* Select if you are processing a loan using the CommonLine certification request. *D - Direct:* Used for Direct Loan only and is invalid value for CommonLine loans. *GO - Guarantee Only:* Select to have the service provider only guarantee the loan. *GP - Guarantee and Print Appl:* Select to have the service provider guarantee the loan and then print and mail a promissory note to the borrower. *M - Manual:* Select if you do not want the loan to be processed electronically. No application files are created for loans with this setting. *PG - Print and Guarantee:* Select to have the service provider print and mail a promissory note to the borrower and guarantee the resulting loan after receipt of the promissory note.
Servicer, Lender, and **Guarantor OPEID** (office of postsecondary education identifier)	Indicates the assigned agencies associated with the Loan Destination Number.

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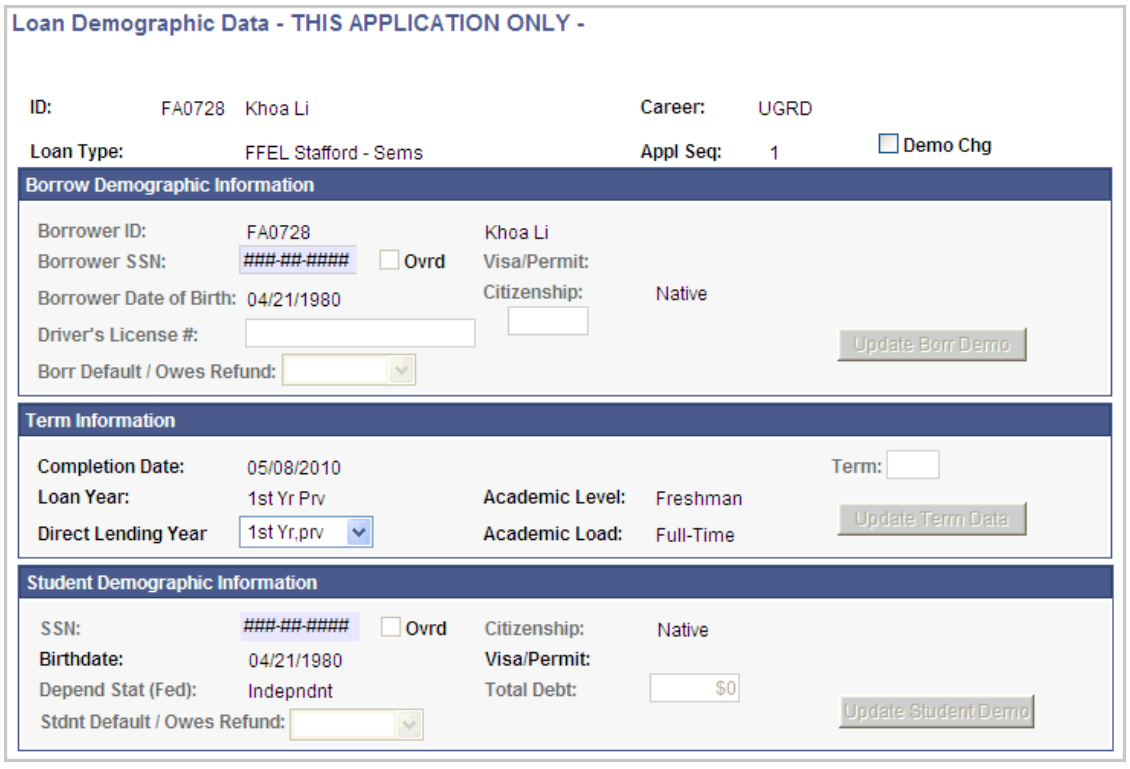
Field or Control	Description
CommonLine Loan Version	Indicates the CommonLine version of the loan destination. Can be changed to reassign the loan destination that supports the adjusted CommonLine version. *CL4:* CommonLine version 4 *CRC:* Common Record CommonLine version For more information, refer to the "Determining the CommonLine Version".

> **Note**
>
> Parent or guardian borrowers must exist on the Personal Data page and have an ID assigned to them. They must be defined as a related parent or guardian for loan processing.

Updating Loan Demographic Data

Access the Loan Demographic Data - THIS APPLICATION ONLY - page (click the **Loan Demographic** link on the Loan Origination 1 page).

This example illustrates the fields and controls on the Loan Demographic Data – THIS APPLICATION ONLY – page. You can find definitions for the fields and controls later on this page.



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To update the loan origination data, you must first update the student's information in Campus Community Fundamentals or FA Term record and then use this page to retrieve and update the loan information. When you run the Loan Origination process with Adjustments selected, the student's program complete date (graduation date) and National Student Loan Data System (NSLDS) Loan Year in the FA Term record.

The changes that you make on this page apply only to the current loan application. If you have several loan applications for a single student, make changes for each loan application.

Field or Control	Description
Demo Chg (demographic change)	Select to make the updateable fields available for entry.

Borrow Demographic Information

Field or Control	Description
Ovrd (override)	Select this check box after selecting the **Demo Chg** check box to enable the **Borrower SSN** field for updating. **Note:** Changes made to the SSN field here only affect this specific loan application.
License # (borrower license number)	Select a driver's license number for the borrower. The system updates the drivers license state field based on the drivers license selected.
Borr Default/Owes Refund (borrower in default/owes refund)	Select *No* or *Yes* to indicate whether the borrower is in default or owes a refund to the federal government. Select *Overridden* to override the borrower's status.
Visa/Permit (borrower visa/permit)	Indicates the borrower's visa ID.
Update Borr Demo (update borrower demographic)	Click to move the most current information from Campus Community Fundamentals (personal data) to the loan application that you are currently using. For example, to change the borrower's date of birth, go to the Biographical Details page to change date of birth. Then return to the Loan Demographic Data page and click the **Updt Borr Demo** button to display the changed information. The system also updates the **Borr SSN, BorrVs/Pmt,** and **Borr Citizenship** fields when you click this button.

Term Information

Field or Control	Description
Term and **Update Term Data**	Select a term and then click the button to move information from the financial aid term to the loan application that you are currently using.

Student Demographic Information

Field or Control	Description

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Field or Control	Description
Ovrd (override)	Select this check box after selecting the **Demo Chg** check box to enable the **SSN** field for updating. **Note:** Changes made to the SSN field here only affect this specific loan application.
Total Debt	Displays the student's lifetime aggregate amount for all loan types. This field is used for some alternative loans and is manually set.
Stdnt Default/Owes Refund (student in default/owes refund)	Select *No* or *Yes* to indicate whether the student is in default or owes a refund. Select *Overridden* to override the student's default status.
Update Student Demo (update student demographic)	Click to move information from Campus Community Fundamentals to the loan application that you are currently using. The system updates the **SSN, Birthdate, Citizenship,** and **Visa/Permit** fields.

> **Warning**
>
> If you override these required fields, *your institution takes full responsibility* for the data you transmit that may be in conflict with existing institutional records. Access to this page should be limited to key personnel.

Entering Loan Relationship Information

Access the Loan Relationship Information page (click the **Select Ref/Csgn** button on the Loan Origination 1 page).

The fields in this component represent the fields listed in the CommonLine Alternative Loan and Reference Information records in the Application Send file. The data collection requirements depend on the loan program.

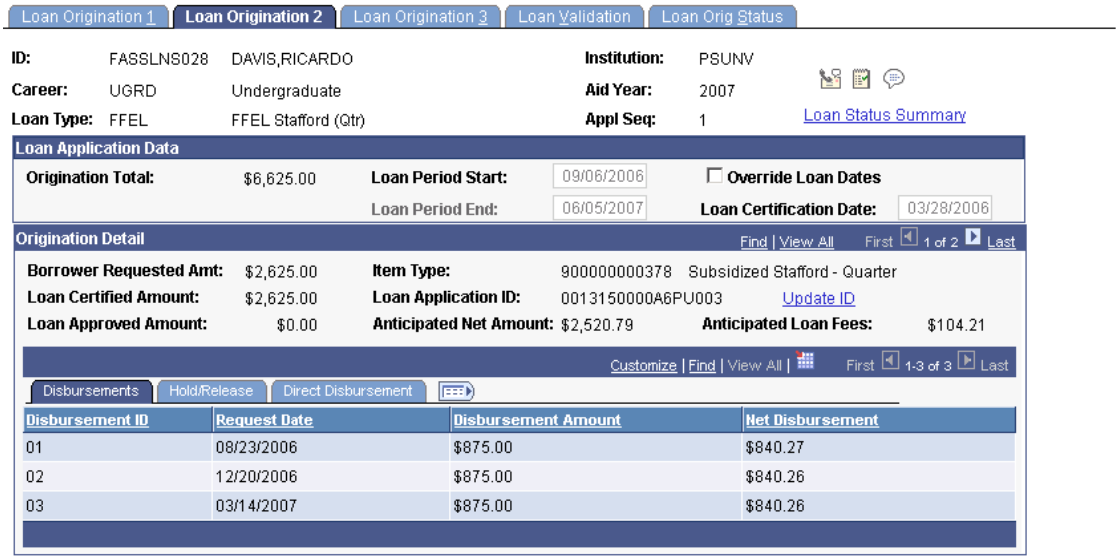
See Creating Loan Reference and Cosigner Relationships.

Reviewing Student Loan Eligibility

Access the Loan Origination 2 page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 2**).

This example illustrates the fields and controls on the Loan Origination 2 page: Disbursements tab. You can find definitions for the fields and controls later on this page.

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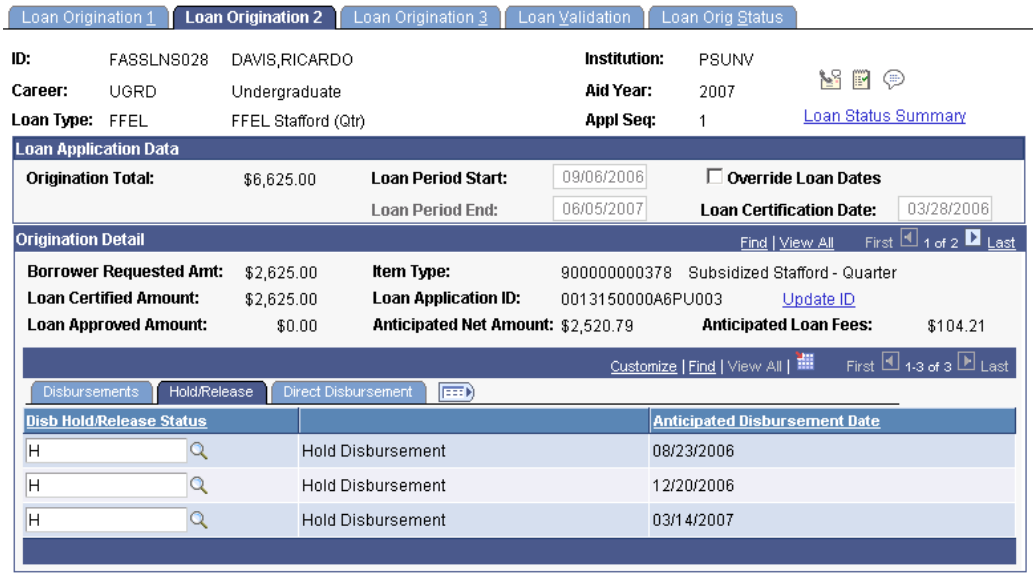
Field or Control	Description
Loan Period Start and **Loan Period End**	Generated from the Valid Careers for Terms table. See Updating Loan Dates. **Note:** Updating Loan Dates is applicable to both Direct Loans and CommonLine Loans.
Loan Certification Date	The date the loan is originated.
Update ID	Click to update the loan application ID.
Override Loan Dates	Select to make the loan period start, loan period end, loan certification, and disbursement date fields available for editing.

Hold Release Tab

Select the **Hold/Release** tab.

This example illustrates the fields and controls on the Loan Origination 2 page: Hold/Release tab. You can find definitions for the fields and controls later on this page.

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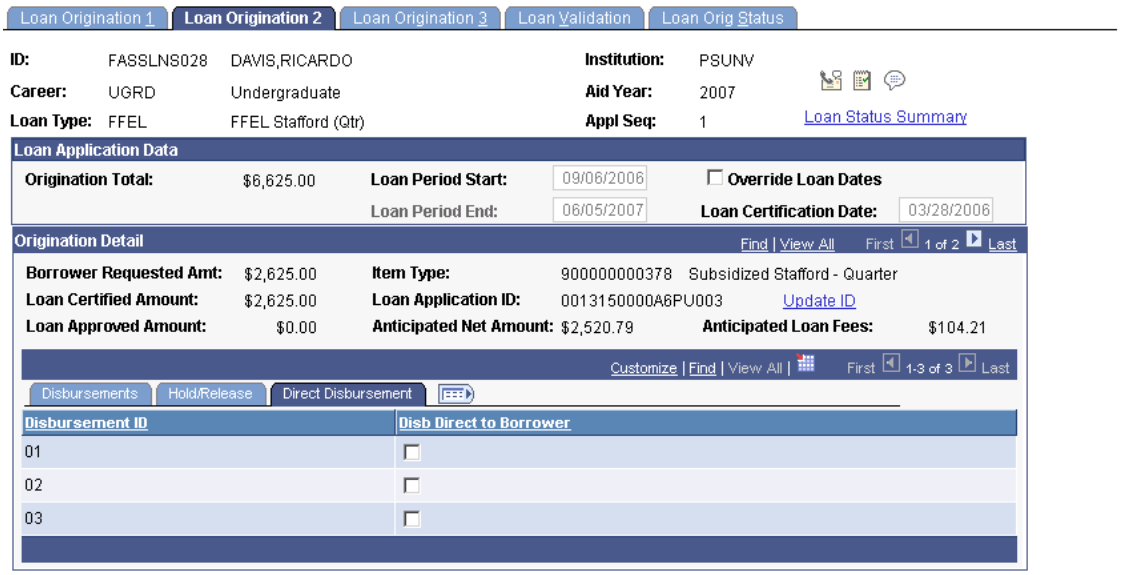
Field or Control	Description
Disb Hold/Release Status (disbursement hold/release status)	Automatically set during origination and when you use the Hold and Release process. The field can be manually set or reset by the Hold and Release process. Select from: *F:* Forwarded to CDA. This is an intermediate status communicated from the lender and is not a valid selection. *H:* Hold Disbursement. Indicates the disbursement to be held by the lender. *N:* Not Supported. Indicates that the loan destination does not participate in the disbursement hold and release process. *R:* Release Disbursement. Indicates the disbursement to be released to the school.

Direct Disbursement Tab

Select the **Direct Disbursement** tab.

This example illustrates the fields and controls on the Loan Origination 2: Direct Disbursement tab. You can find definitions for the fields and controls later on this page.

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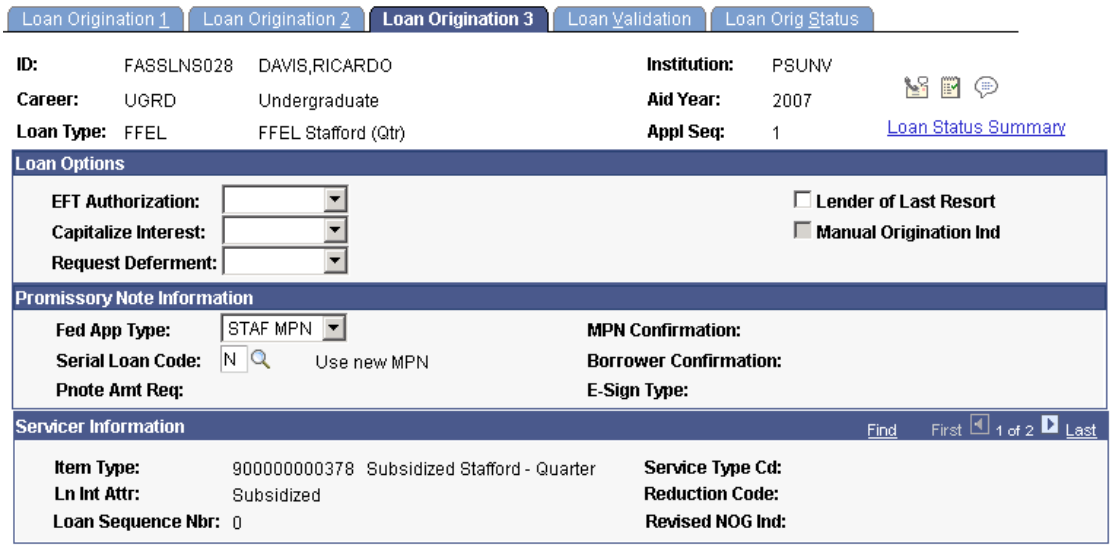


Field or Control	Description
Disb Direct to Borrower (Disburse Direct to Borrower)	Select this check box to request that a disbursement be made directly to the student by the lender. If the lender participates, this optional CommonLine process is valid for all CommonLine loan types. The value is transmitted in the application send file, but is not supported in the change transaction send file.

Managing FFELP Serial Loan Processing

Access the Loan Origination 3 page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 3**).

This example illustrates the fields and controls on the Loan Origination 3 page. You can find definitions for the fields and controls later on this page.



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Loan Options

Field or Control	Description
EFT Authorization (electronic funds transfer authorization)	Select an option for electronic funds transfer authorization. Otherwise, the origination process does this automatically, based on the tracked promissory note. Not applicable for loans using a Stafford or PLUS Master Promissory Notes where EFT authorization is automatically assumed by the loan servicer. Select from: *Yes:* Authorize electronic funds transfer. *No:* Do not authorize electronic funds transfer.
Capitalize Interest	Select *Capitalize* or *Pay Int* to indicate the student's choice of making interest payments on any unsubsidized portion of the loan while in school. Otherwise, the origination process does this automatically, based on the tracked promissory note.
Request Deferment	Select *Yes* or *No* to indicate a request to the lender to defer repayment of the loan if the borrower is eligible. Not applicable for loans using the Stafford or PLUS master promissory notes where a deferment is automatically assumed by the loan servicer.
Lender of Last Resort	For information only. Select if this option is applicable to the loan.
Manual Origination Ind (manual origination indicator)	This field is deactivated and only indicates whether the indicator was set for originated loans.

Promissory Note Information

Field or Control	Description
Fed App Type (federal application type)	Indicates the promissory note used to originate the FFELP loan. Assigned during origination but can be reset manually. Select from: *PL 4/25/94:* Old PLUS promissory note. No longer a valid selection for new loans. *PLUS MPN:* The current valid PLUS Master Promissory Note. *STAF MPN:* The current valid Stafford Master Promissory Note. *Sta 1/3/94:* Old Stafford Application. No longer a valid selection for new loans. *Grad PLUS:* The current valid Graduate PLUS promissory note.

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Field or Control	Description
Serial Loan Code	Indicates the request for the lender to process the loan using the current master promissory note, or request a new note to be collected from the borrower. Assigned during origination but can be reset manually. Select*N* (Use new MPN) or *S* (Serial, Renew existing MPN).
Pnote Amt Req (promissory note amount request)	Displays the amount the student requested on the promissory note used to guarantee the loan. Populated by the loan origination process if a promissory note is used to originate the loan. It also can be updated upon receipt of the application response file when the loan is guaranteed, if the promissory note is issued and collected by the loan servicer. Any increases to the loan cannot exceed this value. A new loan is created if the borrower's loan eligibility exceeds the promissory note amount requested. This field is blank for Stafford and PLUS loans because the amount is no longer captured on the MPN forms.
MPN Confirmation (master promissory note confirmation)	Displays master promissory note confirmation. This code is loaded from the CommonLine Application Response record and indicates whether a service provider has a valid MPN or if the status is unknown. *Y:* (Yes) A valid master promissory note exists. *N:* (No) A master promissory note does not exist. *U:* (Unknown) The service provider cannot confirm that the lender holds the note.
Borrower Confirmation	Indicates whether the service provider has received borrower confirmation of the loan request.
E-Sign Type	This is the reported holder of the student's electronic signature source for the loan promissory note. Although a school is not required to hold or report this information, if received from a loan servicer, the code is loaded to the application.

Servicer Information

Field or Control	Description
Loan Sequence Nbr (loan sequence number)	A value assigned by the loan servicer when the application is guaranteed. The value is used to uniquely identify the loan.

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Field or Control	Description
Service Type Cd (service type code),	Populated by the CommonLine application response file. Except for values 01 and 02, the codes are valid for both CL4 and CRC loans: *01:* For CL4, Lender requested to issue funds to school. No Reference @5 Detail Record included. *01:* For CRC, File creator processed application; file initiator does not initiate disbursement. *02:* For CL4, Lender requested to issue funds to disbursing agent. No Reference @5 Detail Record included. *02:* For CRC, File creator processed application; file initiator to initiate disbursement. *03:* Lender requested to issue funds to school. Reference @5 Detail Record included. *04:* Lender requested to issue funds to disbursing agent. Reference @5 Detail Record included. *05:* File creator processed application; file creator does not initiate disbursement. No Reference @5 Detail Record included. *06:* File creator processed application; file creator to initiate disbursement. No Reference @5 Detail Record included. *07:* File creator processed application; file creator does not initiate disbursement. Reference @5 Detail Record included. *08:* File creator processed application; file creator to initiate disbursement. Reference @5 Detail Record included.
Reduction Code	Populated by the CommonLine application response file. *01:* Approved for requested amount. *02:* Reduced to maximum for grade level. *03:* Reduced to maximum for career. *04:* Reduced to maximum for period. *05:* Lender approved amount. *06:* Reduced to unmet need. *07:* Reduced to maximum for guarantor. *08:* Reduced to school certification amount. *09:* Reduced to maximum for endorser. *10:* Reduced to maximum of guarantor policy. *11:* Reduced by borrower.
Revised NOG Ind (revised notice of guarantee indicator)	Populated by the CommonLine application response file. *N:* Revised notice of guarantee is not sent. *U:* Unknown. *Y:* Revised notice of guarantee is sent.

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Validating CommonLine Loans

This section discusses how to:

- Validate CRC loans.
- Validate CommonLine 4 loans.
- Review CommonLine validation edit error messages.
- Review CommonLine loan status information.

Pages Used to Validate CommonLine Loans

Page Name	Definition Name	Navigation	Usage
Validate CRC Loans	SFA_CRCLNED_RUNCTL	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Validate CRC Loans**	Create loan validation requests and run the loan validation process for CRC loans. You can also run this process in simulation mode where edit error messages are generated, but the status of the loan is not updated.
Validate CL 4 Loans	LN_EDIT_RUNCTL	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Validate CL 4 Loans**	Create loan validation requests and run the loan validation process for CL 4 loans. You can also run this process in simulation mode where edit error messages are generated, but the status of the loan is not updated.
Loan Validation	SFA_CRC_LN_ORIG_ER	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Validation**	Review edit error messages found after the loan validation process. After you correct the errors, rerun the loan validation process. Make sure that no errors exist before generating outbound loan files. Use the online loan validation process to validate CRC loans.

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Page Name	Definition Name	Navigation	Usage
Origination Detail	LN_ORIG_TRANS_SEC	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Override Loan Status. Click the top Detail link.**	Manually set the **Loan Action Status** field to *Authorized.*
Loan Status Summary Information	SFA_CR_STATSUM_SEC	Click the **Loan Status Summary** link on any page in the Originate Loan component.	View information about a student's loan eligibility by viewing the current loan level and disbursement level statuses.

Validating CRC Loans

Access the Validate CRC Loans page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Validate CRC Loans**).

If you originate loans under Common Record CommonLine, run the CRC loan validation process (FAPREQRN) to check loan origination records for errors. You must validate originated loans for the system to create and transmit a CommonLine Application Send file to the loan servicer. Each validation request comprises one or many selection criteria. To control the frequency that loan validation requests are executed, run the validation process by maintaining multiple validation requests.

Validating CommonLine 4 Loans

Access the Validate CL 4 Loans page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Validate CL 4 Loans**)

If you originate loans under CommonLine 4, run the CommonLine 4 loan validation process (FAPREQRN) to check loan origination records for errors. Originated loans must be validated for a CommonLine Application Send file to be created and transmitted to the loan servicer. Each validation request comprises one or many selection criteria. To control the frequency that loan validation requests are executed, run the validation process by maintaining multiple validation requests.

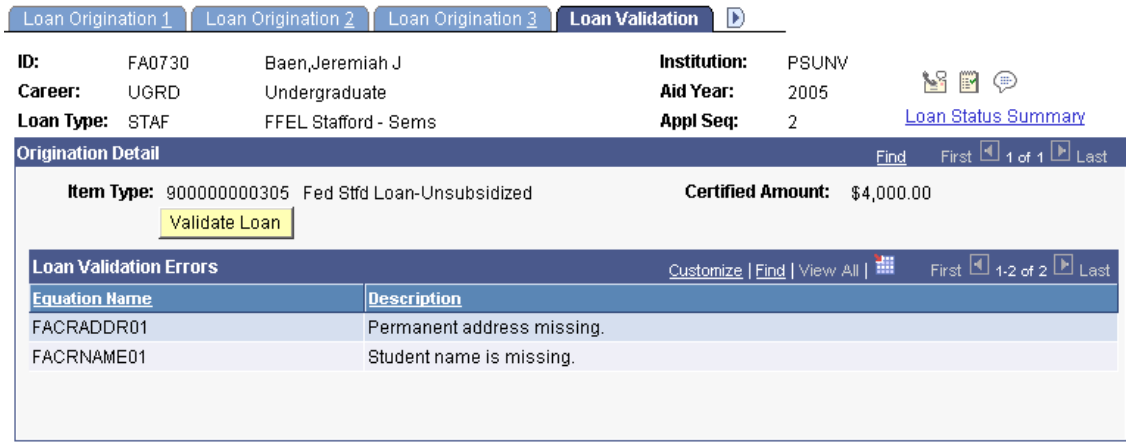
Field or Control	Description
Loan Edit Update Run	Select to have the loan validation process update the target loan origination records action status. If you clear this check box and run the process in simulation mode, only edit error messages are produced.

Reviewing CommonLine Validation Edit Error Messages

Access the Loan Validation page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Validation**).

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

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When the Loan Edit Update Run Option process validates a loan, the system sets the loan action status to *Authorized for transmission* on the Loan Status Summary Information page. If the loan fails validation, the loan action status is set to *Failed* (authorization) and an explanatory edit error messages is displayed. If the loan contains separate subsidized and unsubsidized item type origination detail records, there are separate loan action statuses and edit error messages for each.

To resolve loan validation edit errors, review the CL 4 or CRC loan edit table in the CommonLine setup topics for information on causes for validation failure. Correct the edit error condition and then rerun the validation process. Failed loans become authorized when all the error conditions have been corrected.

If an edit error is not appropriate for the loan destination, you can permanently deactivate the edit in the corresponding loan destination component. To authorize a failed loan without clearing the edit error conditions, manually set the loan action status to *Authorized* on the Origination Detail page. Review the CL Validation Errors report for a complete list of CommonLine loans that have failed the loan validation processes.

For CRC loans, the online loan validation process is made available; click the **Validate Loan** button to initiate the Loan Validation process for that specific loan. This option is not available for CL 4 loans. If a loan contains separate subsidized and unsubsidized records, you must validate each one.

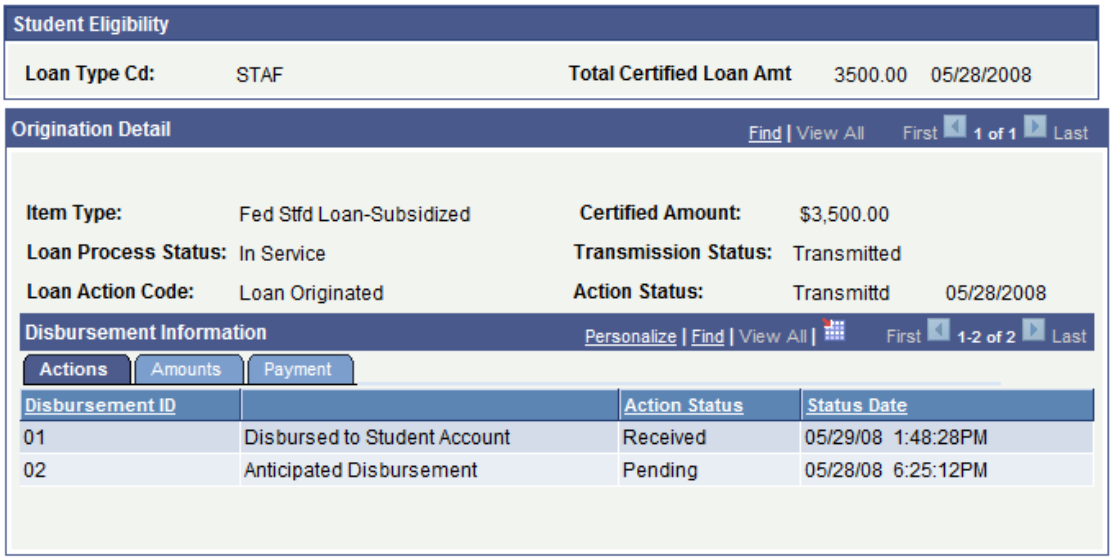
Reviewing CommonLine Loan Status Information

Access the Loan Status Summary Information page (click the **Loan Status Summary** link on any page in the Originate Loan component).

This example illustrates the fields and controls on the Loan Status Summary Information page: Actions tab. You can find definitions for the fields and controls later on this page.

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Loan Status Summary Information



Use this page at various stages of the loan origination process, including after origination, after validation, after disbursements, and after information from the loan servicer has been processed.

Student Eligibility

Field or Control	Description
Total Certified Loan Amt (total certified loan amount)	Displays the total amount certified including both subsidized and unsubsidized item types used for the same origination record.

Origination Detail

Field or Control	Description
Loan Process Status	Displays the overall status of the loan. Used in conjunction with the **Transmission Status.** Values are: *Origination Pending:* Loan has been originated or reset due to a loan rejection, and waiting loan validation. *In Service:* Indicates the loan has been transmitted to the appropriate servicer. *Terminated:* Indicates that a pre-guarantee loan cancellation has been initiated. *Hold:* The loan is on hold and the system suspends all loan processing until the hold is removed. *Canceled:* A loan cancellation has been initiated.
Loan Action Code	Displays the most recent origination level action taken on the loan.

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Field or Control	Description
Transmission Status	Displays the current status of the loan in relation to the loan servicer. Used in conjunction with the loan process status to know the overall status of the loan. Values are: *Accepted:* Indicates the servicer has accepted the loan. *Change Pending Transmission:* Indicates an adjustment generated a change transaction that has not been sent to the servicer. *Error:* Not used for CommonLine loans. *Origination Pending Transmission:* Indicates an Origination that has not been transmitted to the servicer. *Transmitted:* Indicates that an origination or change transaction has been sent to the loan servicer.
Action Status	Displays the status of the loan action code.

Disbursement Information

Shows the most recent actions performed on the individual loan disbursements.

Field or Control	Description
Disbursement ID	Indicates the disbursement number of the selected loan and the disbursement sequence.
Action Status	Displays the status and date of the most recent action.

Amounts Tab

Select the Amounts tab.

This example illustrates the Loan Status Summary Information page: Amounts tab.

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Loan Status Summary Information

Student Eligibility

Loan Type Cd:	STAF	Total Certified Loan Amt	3500.00	05/28/2008

Origination Detail — Find | View All — First 1 of 1 Last

Item Type:	Fed Stfd Loan-Subsidized	Certified Amount:	$3,500.00	
Loan Process Status:	In Service	Transmission Status:	Transmitted	
Loan Action Code:	Loan Originated	Action Status:	Transmittd	05/28/2008

Disbursement Information — Personalize | Find | View All | First 1-2 of 2 Last

Actions | Amounts | Payment

Disbursement ID	Disbursement Amount	Loan Fees	Net Disbursement	Disb Hold/Release Status
01	$1,750.00	$70.00	$1,680.00	Hold
02	$1,750.00	$68.00	$1,682.00	Hold

View the calculated loan disbursement amounts.

Payment Tab

Select the Payment tab.

This example illustrates the Loan Status Summary Information page: Payment tab.

Loan Status Summary Information

Student Eligibility

Loan Type Cd:	STAF	Total Certified Loan Amt	3500.00	05/28/2008

Origination Detail — Find | View All — First 1 of 1 Last

Item Type:	Fed Stfd Loan-Subsidized	Certified Amount:	$3,500.00	
Loan Process Status:	In Service	Transmission Status:	Transmitted	
Loan Action Code:	Loan Originated	Action Status:	Transmittd	05/28/2008

Disbursement Information — Personalize | Find | View All | First 1-2 of 2 Last

Actions | Amounts | Payment

Disbursement ID	Net Amount Received	Actual Amount Disbursed	Disbursement Date	Disbursement Hold
01	1680.00	1680.00	05/29/2008	N
02				N

View actual disbursement amounts received by the school and paid to the student's account.

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Managing Loan Origination Transmission Data

This section discusses how to:

- View a student's originated loans.
- View loan application summary.
- View loan origination information.
- View loan origination change.
- View loan period change.
- Override loan origination transmission data.

Pages Used to Manage CommonLine Loan Origination Transmission Data

Page Name	Definition Name	Navigation	Usage
Origination Student Summary	LOAN_ORIG_SUMM	**Financial Aid**, and then **Loans**, and then **View Originated Loans**, and then **Origination Student Summary**	View a student's originated loans for a selected aid year.
Loan Application Summary	LOAN_ORIG_SUMM_DTL	Click the **Appl Data** link on the Origination Student Summary page.	View one originated loan for a student in a particular aid year.
Loan Origination Information	LOAN_ORIG_SEC	Click the **Origination Status** link on the Loan Application Summary page.	View loan level actions that monitor the progress of the loan application.
Origination Loan Disbursement	LOAN_DISBURSEMENT	Click the **Disbursement Status** link on the Loan Application Summary page.	Review activity related to each disbursement record for a student's loan.
Loan Origination Change	LN_CL_ORIG_CHG_SEC	Click the **Change** link on the Loan Origination Information page.	When you run adjustments, view the type of loan change record or the changes that occurred.
Loan Period Change	LN_CL_ORIG_CHG_07	Click the **Change** link on the Loan Origination Change page.	View the change information that is sent to the loan servicer.
Loan Action Message Detail	LOAN_ORIGACTN_SEC	Click the **Message** link on the Loan Origination Information page.	View any change error messages received on the CommonLine application response record that generated the origination action.

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Page Name	Definition Name	Navigation	Usage
CommonLine Loan Origination Transmission	LOAN_ORIG_TRANS	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Override Loan Status**, and then **CommonLine Loan Origination Transmission**	Manually update loan status values to synchronize with the loan servicers. Can be used to manually approve or deny a loan record.

Viewing a Student's Originated Loans

Access the Origination Student Summary page (**Financial Aid**, and then **Loans**, and then **View Originated Loans**, and then **Origination Student Summary**).

Field or Control	Description
Appl Data (application data)	Click to open the Loan Application Summary page.

Viewing Loan Application Summary

Access the Loan Application Summary page (click the **Appl Data** link on the Origination Student Summary page).

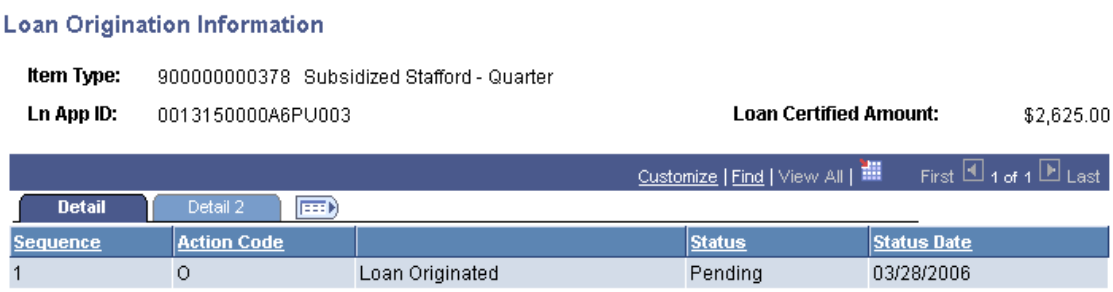
Field or Control	Description
LnAmt Borr (loan amount borrowed)	Displays the actual amount the student has borrowed.
Loan Start and **Loan End**	Displays the loan period dates.
Remaining Loan Eligibility	The difference between the origination amount detail and the borrower requested amount.
Student Loan Summary	Click to access the Origination Student Summary page.
Origination Status	Click to access the Loan Origination Information page.
Disbursement Status	Click to access the Origination Loan Disbursement page.

Viewing Loan Origination Information

Access the Loan Origination Information page (click the **Origination Status** link on the Loan Application Summary page).

This example illustrates the fields and controls on the Loan Origination Information page: Detail tab. You can find definitions for the fields and controls later on this page.

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The page displays loan level activity. The action rows are displayed in reverse chronological order so that the most recent changes appear on top.

Field or Control	Description
Action Code	Loan action codes are predefined and delivered with the system to indicate actions performed on the loan.

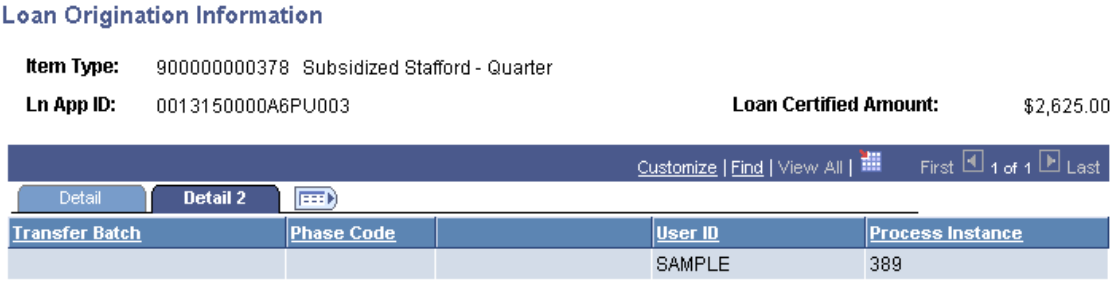
> **Note**
>
> The **Change** and **Message** links are available only when a change or message is associated with the record. Links are available to view the CRC status codes and the corresponding CRC staging table information for the selected loan action row.

See Processing Loan Changes.

Detail 2 Tab

Select the Detail 2 tab.

This example illustrates the fields and controls on the Loan Origination Information page: Detail 2 tab. You can find definitions for the fields and controls later on this page.



Use to view secondary loan action information.

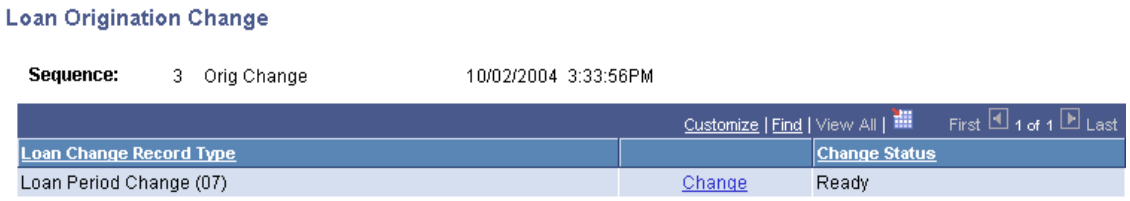
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Field or Control	Description
Transfer Batch	Indicates the ID for the specific batch in which the loan was transmitted or received. CommonLine 4 loans only.
User ID	Indicates the person who ran the process that inserted the loan action code.
Process Instance	Indicates the unique ID of the process that posted the loan action message on the page. You can use this on the Messages page to select the instance.

Viewing Loan Origination Change

Access the Loan Origination Change page (click the **Change** link on the Loan Origination Information page.

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



This page is only available for approved loans that have been adjusted by the loan origination process.

Field or Control	Description
Change	Click to access the Loan Period Change page. This link is active if additional change information exists.
Message	This link, if active, enables you to view any errors reported by the loan servicer when the change record is processed.
Change Status	Displays status of the change record type. Change status values are: *Ready:* The change record type is ready to be transmitted. *Pending:* Additional action is required before the change record type can be transmitted. This status only occurs with Change Record Types 11 and 12. *Accepted:* The change transaction has been received and approved by the loan servicer. *Error:* The change transaction sent to the loan servicer has not been approved. The Message link is active to enable you to view change errors.

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> **Note**
>
> This page varies depending on the loan change record type.

Viewing Loan Period Change

Access the Loan Period Change page (click the **Change** link on the Loan Origination Change page).

This page is only available for approved loans that have been adjusted by the loan origination process. In this example, the system displays the fields changed for the Loan Period Change (07) record. The system displays a different page for each of the following change record types:

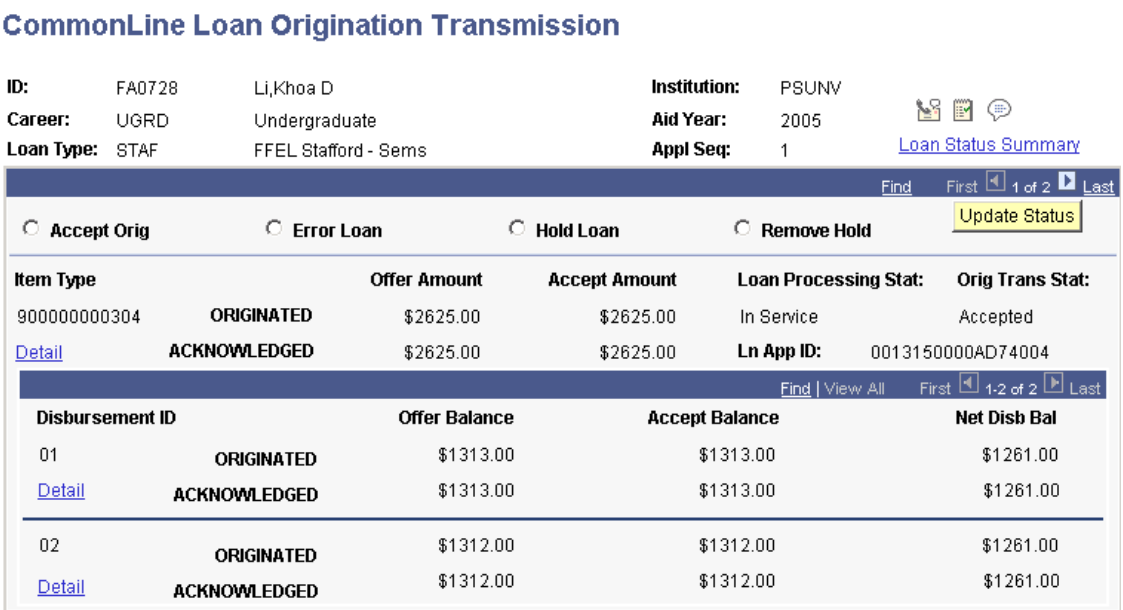
- Loan Period Change (07)
- Ln (Loan) Cancellation/Reinstatement (08)
- Loan Increase (24)

> **Note**
>
> Change record types 11, 12, 13, and 14 are not supported.

Overriding Loan Origination Transmission Data

Access the CommonLine Loan Origination Transmission page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Override Loan Status**, and then **CommonLine Loan Origination Transmission**).

This example illustrates the fields and controls on the CommonLine Loan Origination Transmission page. You can find definitions for the fields and controls later on this page.



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Use this page to override loan status information. You should only override the status of an originated loan in cases where the processing of loans using the automated processes cannot process the loan properly. Overriding loan information should be done with a clear understanding of the purpose and expected result from overriding the loan status. New problems can be created for the loan if information is changed without performing correct analysis.

> **Note**
>
> Because this page enables you to change important financial eligibility information, access should be restricted to users with the appropriate security access.

Field or Control	Description
Accept Orig (accept origination)	When you select this option and click **Update Status,** you accept current originated and adjusted loan amounts. The transmitted fields are filled with the same amount as the originated fields. The system generates a new origination action code of *PSMA* (manually accepted). This is the same as receiving a CommonLine application response file where the student's loan is reported guaranteed or a CommonLine application response file in response to a CommonLine change transaction. This action also manually releases a loan from error status. The loan is eligible for loan adjustment processing as long as the process level is not set to *M* (manual).
Error Loan	When you select this option and click **Update Status,** the system manually rejects the loan by generating a new origination action code of *PSMR* (manually rejected). The system then resets the loan to a pending status. This enables you to correct the reason for the manual rejection and re-originate the loan. **Note:** If you are rejecting a loan because the borrower is no longer eligible, you must adjust the student's package to reflect the change in eligibility.
Hold Loan	When you select this option and click the **Update Status** button, the system changes the **Loan Processing Stat** (loan processing status) field to *Hold.*
Remove Hold	When you select this option and click the **Update Status** button, the system resets the **Loan Processing Stat** (loan processing status) field to *In Service.*

The loan processing status and origination transmission status values are updated when a manual action is initiated.

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Accept Origination Value Changes

Original Loan Processing Stat Value	Original Orig Trans Stat Value	New Loan Processing Stat Value	New Orig Trans Stat Value
Origination Pending	Origination Pending	In Service	Accepted
In Service	Transmitted (not previously accepted)	In Service	Accepted
In Service	Change Pending	In Service	Accepted
In Service	Transmitted (previously accepted)	In Service	Accepted
Cancelled	Change Pending	In Service	Accepted
Cancelled	Transmitted	In Service	Accepted

Error Value Changes

Original Loan Processing Stat Value	Original Orig Trans Stat Value	New Loan Processing Stat Value	New Orig Trans Stat Value
Origination Pending	Origination Pending	Origination Pending	Origination Pending
In Service	Transmitted (not previously accepted)	Origination Pending	Origination Pending
In Service	Change Pending	In Service	Error
In Service	Transmitted (previously accepted)	In Service	Error

Related Topics

- Reviewing Loans on Hold
  Access the Loan Orig Status page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Orig Status**).

Viewing Loan Disbursement Activity

This section provides common elements and discusses how to:

- Review loan disbursement activity.
- Review loan disbursement actions.
- Review loan disbursement changes.
- Review cancelled and reinstated loans.
- Review loan award disbursement information.
- Review loan award transmission status.

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Pages Used to View Loan Disbursement Activity

Page Name	Definition Name	Navigation	Usage
Origination Loan Disbursement	LOAN_DISBURSEMENT	**Financial Aid**, and then **Loans**, and then **View Disbursement Status**, and then **Origination Loan Disbursement**	Review activity related to each disbursement record for a student's loan including current payment information.
Loan Application Summary	LOAN_ORIG_SUMM_DTL	Click the Appl Data link on the Origination Student Summary page.	View one originated loan for a student in a particular aid year.
Loan Disbursement Action	LOAN_DISBACTN_SEC	Click the **Detail** link on the Origination Loan Disbursement page.	Review secondary loan disbursement action information.
Loan Disbursement Change	LN_CL_DISB_CHG_SEC	Click the **Disbursement Action Detail** button on the Loan Disbursement page.	Review loan disbursement level changes of transaction record type that was calculated by the loan adjustment program.
Cancel/Reinstate Loan	LN_CL_DISB_CHG_09 LN_CL_DISB_CHG_10	Click the **Change** link on the Loan Disbursement Change page.	View the disbursement related change record information.
Disbursement Message Information	LOAN_DISB_MSG_SEC	Click the **Message** link on the Loan Disbursement page.	View loan disbursement error messages received on the CommonLine change response record.
Loan Award Disbursement Inquiry	LN_AWRD_DISB_INQ	**Financial Aid**, and then **Loans**, and then **View Award Disbursements**, and then **Loan Award Disbursement Inquiry**	Review loan disbursement information as it relates to the student's packaged loan awards.
Loan Transmission Status	LOAN_ORIG_TRNS_INQ	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Loan Transmission Information**, and then **Loan Transmission Status**	Review loan award transmission status as well as all loan and disbursement level activity.

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Reviewing Loan Disbursement Activity

Access the Origination Loan Disbursement page (click the **Disbursement Status** link on the Loan Application Summary page).

Disbursement Information

Field or Control	Description
Percentage	Indicates the percentage of the total loan award the disbursement represents.
Loan Paid	Indicates whether the first disbursement has been credited to the student's account in Student Financials.
H/R Stat (hold/release status)	Indicates whether the disbursement is on hold *(H)* or release *(R)* status.

Disbursement Actions

As changes to the disbursement occur, a new row of disbursement information is inserted. The information is sorted in reverse chronological order so that the most recent action appears first.

Field or Control	Description
Sequence	Displays the most recent action.
Return to Application	Click to access the Loan Application Summary page.
Detail	Click to access the Loan Disbursement Action page to view secondary disbursement action data.
Change	Click to view the disbursement level CommonLine 4 Change transaction record type that is required to be sent to the loan servicer.
Message	Click to view loan disbursement error messages received.

> **Note**
>
> The Change and Message links are available only when a change or message is associated with the record.

Reviewing Loan Disbursement Actions

Access the Loan Disbursement Action page (click the **Detail** link on the Origination Loan Disbursement page).

View secondary disbursement action information.

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Field or Control	Description
Loan Disbursement Amt (loan disbursement amount)	Displays the gross loan amount. This is the same value that displays on the parent page.
Net Loan Disbursement	Displays the net loan amount after fees are subtracted. This is the same value that displays on the parent page.
Seq Nbr (sequence number)	Displays the sequence number of the disbursement action. This is the same value that displays on the parent page. You can view all disbursement actions by pressing the View All link.
Action Code	Displays a code that represents a disbursement action message.
Actn Amt (action amount)	Displays the gross disbursement amount.
Actn Net (action net)	Displays the net disbursement amount after subtracting fees.
Actn Fee (action fee)	Displays the loan fee amount for the disbursement.
Actn Adj (action adjustment)	Displays the adjusted disbursement amount reported. This field is only populated if applicable.
Transfer Batch	Displays the number generated by the institution to uniquely identify a specific batch of records.

Reviewing Loan Disbursement Changes

Access the Loan Disbursement Change page (click the **Disbursement Action Detail** button on the Loan Disbursement page).

This page is only available for approved loans that have been adjusted by the loan origination process.

Field or Control	Description
Change	Click to access the Cancel/Reinstate Loan page and view any errors reported by the loan servicers when the change record is processed.
Message	Click to access the Disbursement Message Information page and view disbursement related change information that is sent to the loan servicer.

Related Topics

- Viewing Loan Origination Change
  Access the Loan Origination Change page (click the **Change** link on the Loan Origination Information page.

Reviewing Cancelled and Reinstated Loans

Access the Cancel/Reinstate Loan page (click the **Change** link on the Loan Disbursement Change page).

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In this example, the system displays the fields changed for the 09 record. The system displays a different page for each of the following change record types:

- Pre Disbursement Change (09)
- Post Disbursement Change (10)

Reviewing Loan Award Disbursement Information

Access the Loan Award Disbursement Inquiry page (**Financial Aid**, and then **Loans**, and then **View Award Disbursements**, and then **Loan Award Disbursement Inquiry**).

Use the upper scroll area to view the student's different loan awards. This information is derived from the Award Summary component.

Field or Control	Description
Award Status	Displays the current status of the student's loan item type from the Award Summary page.
Disbursement Plan	Displays the disbursement distribution rule applied when the loan item type is awarded to the student.
Offered and Accepted	Indicates the current offered and accepted loan amounts in the student's award summary.

Use the middle scroll area to view the status of each disbursement for the loan award. This information is derived from the disbursement level information on the Award Summary component.

Field or Control	Description
Disbursed Balance	Displays the disbursement amount that has been applied to the student's financial account.
Net Disbursed Balance	Displays the net balance of the disbursement amount calculated at the time the loan was awarded to the student.

The section in the lowermost scroll area displays loan disbursement information for any loans originated for the loan item type shown in the upper scroll areas.

Field or Control	Description
Loan Refund ID (loan refund ID)	Displays the ID of the person who receives any refunds on the loan. Student Financials uses this ID to generate refund checks.
Loan Refund Indicator	Displays the person who receives any refunds on the loan. Values are *Student* and *Borrower.*

Reviewing Loan Award Transmission Status

Access the Loan Transmission Status page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Loan Transmission Information**, and then **Loan Transmission Status**).

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Field or Control	Description
Loan Status Summary	Click this link to access the Loan Status Summary Information page.

Processing CRC Loan Files

This section discusses how to select validated CRC outbound files to move to CRC staging tables.

Pages Used to Process CRC Loan Files

Page Name	Definition Name	Navigation	Usage
Process CRC Outbound Records	SFA_RUNCTL_CRC_OUT	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CRC Outbound Records**	Select and process validated loans to the CRC staging tables. Create XML outbound files for transmission to the loan servicers.
CRC Document	SFA_CRC_DOCUMENT	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Application Records**, and then **CRC Document**	View CRC Document level information for all application records generated by the CRC Outbound Staging process, as well as all application response records received from the loan servicers.
Financial Summary	SFA_CRC_FIN_SUM	Click the **Financial Summary** link on the CRC Document page.	Review net disbursement, EFT disbursement, non EFT disbursement, cancellation, reissue, and deficit amount.
Document Response	SFA_CRC_DOC_RSP	Click the **Response Information** link on the CRC Document page.	Review response error code, message, and report value.
CRC School Information	SFA_CRC_ATTSCHL	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Application Records**, and then **CRC School Information**	Review attended school ID, attending school branch ID, and response code.
Attended School Response	SFA_CRC_ATTEND_RSP	Click the **Response Information** link on the CRC School Information page.	Review response error code, message, and report value.

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Page Name	Definition Name	Navigation	Usage
CRC Student	SFA_CRC_STUDENT	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Application Records**, and then **CRC Student**	View student information (name, SSN, date of birth, driver's license, citizenship status, residency, and email address).
Student Response	SFA_CRC_STU_RSP	Click the **Response Information** link on the CRC Student page.	Review student response, error, message, and reported value.
Student Address	SFA_CRC_ADDRESS	Click the **Address Information** link on the CRC Student page.	Review the student's address information.
Phone Information	SFA_CRC_PHONE	Click the **Phone Number Information** link on the CRC Student page.	Review telephone information.
Employment Information	SFA_CRC_EMP_INFO	Click the **Employment Information** link on the CRC Student page.	Review employment type, position, years at employer, address, and telephone information.
Financial Data	SFA_CRC_FIN_DATA	Click the **Financial Data Information** link on the CRC Student page.	Review salary, other income, credit card and house payment, and other payments and debt.
CRC Award	SFA_CRC_AWARD	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Application Records**, and then **CRC Award**	Review award type, award amount, and promissory note, guarantor, and lender status information.
Loan Information	SFA_CRC_LN_INFO	Click the **Loan Information** link on the CRC Award page.	Review award dates, EFC/SAI, academic program, enrollment status information, and various codes and indicators.
Signature Information	SFA_CRC_LN_SIGN	Click the **Signature Information** link on the Loan Information page.	Review signature date, source code, and electronic signature information.
Guarantor/Lender Information	SFA_CRC_LN_LNDR	Click the **Guarantor/ Lender** link on the Loan Information page.	Review lender and guarantor IDs.
Loan Information Response	SFA_CRC_LN_RSP	Click the **Response Information** link on the Loan Information page.	Review response error, message, and reported value.

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Page Name	Definition Name	Navigation	Usage
Unique Data	SFA_CRC_UNQ_DATA	Click the **Unique Data** link on the CRC Award page.	Review additional miscellaneous information.
Student Award Response	SFA_CRC_AWD_RSP	Click the **Response Information** link on the CRC Award page.	Review student award response error, message, and total value.
CRC Disbursement	SFA_CRC_DISB	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Application Records**, and then **CRC Disbursement**	Review disbursement information.
Disbursement Response	SFA_CRC_DSB_RSP	Click the **Response Information** link on the CRC Disbursement page.	Review disbursement response error, message, and reported value.

Selecting Validated CRC Loan Records to Outbound

Access the Process CRC Outbound Records page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CRC Outbound Records**).

This page controls one or both processes used for generating CRC XML files:

- CRC outbound staging (FAPCLOUT) process, a COBOL SQL process
- CRC XML outbound (SFA_CRC_OUT) process, an Application Engine process to generate the XML files.

> **Note**
>
> The processes are not defined to run in sequence. Use the Process Scheduler to create a job definition if you want to run the processes in sequence.

Field or Control	Description
Orig Outbound (origination outbound)	Select to gather all pending origination records for the specified institution, aid year, and school code.
Orig Change Outbound (origination change outbound)	Select to gather all pending origination change records for the specified institution, aid year, and school code.

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Field or Control	Description
Demographic Changes	This option is only available when you select the **Orig Change Outbound** check box. Select to have address, phone, and email information evaluated and modified information submitted in the change transaction record. Use this option if you have changed address, phone, or email address information and then calculated a change transaction for the loan.

Creating CL 4 Loan Files

After you have originated and validated your FFELP and alternative loans, you create the files to send to the loan destination.

This section provides an overview and discusses how to:

- Select validated CL 4 loan files to outbound.
- Generate CL 4 files to transmit.
- Rename CommonLine 4 files.

Pages Used to Create CL 4 Loan Files

Page Name	Definition Name	Navigation	Usage
Process CL 4 Outbound Files	RUNCTL_CLOUT	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CL 4 Outbound Records**, and then **Process CL 4 Outbound Files**	Select and process validated CommonLine 4 loans and load them into EDI Manager staging tables.
Run Parameters	EC_RUN_OUTBOUND_01	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Outbound EC Agent**, and then **Run Parameters**	Generate files from the data in the EDI Manager staging tables.
Rename EDI Outbound File	RUNCTL_RENAME	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Rename Outbound Files**, and then **Rename EDI Outbound File**	Rename one or more CL 4 files to a standard naming convention before transmitting to loan servicers.

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Selecting Validated CL 4 Loan Files to Outbound

Access the Process CL 4 Outbound Files page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CL 4 Outbound Records**, and then **Process CL 4 Outbound Files**).

Insert rows to add additional institution, aid year, school code, and version combinations for the CommonLine 4 Outbound (FAPLCOD4) process, a COBOL SQL process.

Field or Control	Description
Version	Select CommonLine 4.
Orig Outbound (origination outbound)	Select to gather all pending origination records for the specified institution, aid year, and school code.
Orig Change Outbound (origination change outbound)	Select to gather all pending origination change records for the specified institution, aid year, and school code.

Generating CL 4 Loan Files to Transmit

Access the Run Parameters page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Outbound EC Agent**, and then **Run Parameters**).

Outbound Agent Run Parameters

Before running this process for the first time, confirm that your technical staff has run the EC Prep process to generate a current ecoutmap.sqc file. The mapping in this file is used by the system to correctly format the outbound files. If the ecoutmap file is not created, the system may generate empty files.

The EC Prep process is run from PeopleTools, EDI Manager, Monitor EDI Processing, Prepare Outbound Driver.

Field or Control	Description
EC Trans ID (electronic commerce transaction identification)	Select this check box. The EC transaction ID uses the same name as the message class. You must run this process separately for each EC transaction ID. The following transaction IDs are available: *A004P:* CommonLine 4 application send record. *C004P:* CommonLine 4 change transaction send record.
Business Unit	Not used for loan processing.
Vender/Customer	Select to create files only for the loan destination number you enter.

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Outbound File Options

Field or Control	Description
Suppress EC 999 Record	This option controls whether loan files are generated with or without the 999 row at the beginning of the file. If you plan to use the Rename EDI Outbound File process, clear this option to allow the required 999 row to be generated.
Separate Output Flag	You should check this option to prevent multiple individual files for the same loan destination from becoming concatenated into a single superfile. Loan servicers might not accept superfiles. Check with your loan servicers to determine whether you should use this option.

Renaming CommonLine 4 Files

Access the Rename EDI Outbound File page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Rename Outbound Files**, and then **Rename EDI Outbound File**).

Use this page to rename files to match the naming standards of your guarantor or lender.

Reviewing and Managing CRC XML Files

Two components assist in the management of generated and loaded CRC XML files.

This section discusses how to:

- View CRC loan file transactions.
- Monitor CRC award load status.

Pages Used to Review and Manage CRC XML Files

Page Name	Definition Name	Navigation	Usage
CRC Document Management	SFA_CRC_FILE_REV	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **CRC Document Management**	Review generated XML files, outbound to stage files, XML loaded to stage files, or XML processed files.
CRC Award Management	SFA_CRC_LOAD	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **CRC Award Management**	View process status and loan information.

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Page Name	Definition Name	Navigation	Usage
Loan Status Codes	SFA_CRC_AWD_ST_SEC	Click the **Loan Status Codes** link on the CRC Award Management page.	View loan status codes and descriptions.

Viewing CRC Loan File Transactions

Access the CRC Document Management page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **CRC Document Management**).

This page displays information for all CRC loan files loaded in the CRC staging tables. Each row in the grid represents an XML document (file). You can view documents generated by the system and documents received from the loan servicers on this page. Use the component to monitor and control the processing of CRC XML files. This is similar to the EC Queue Review component used for CommonLine 4.

Field or Control	Description
Filter by Process Status	The page is designed to view only CRC documents of a specific process status. The process status is the current state of the XML document. Select from: *Generated XML:* Loan request documents generated by the CRC Outbound process where the XML file has already been created. *Outbound to Stage:* Loan request documents generated by the CRC Outbound process where the XML file has not yet been created. *XML Loaded to Stage:* Loan response documents received from the loan servicers and recently loaded into the staging tables that have not yet been processed by the CRC Inbound process. *XML Processed:* Loan response documents received from the loan servicers, loaded into the staging tables that have already been processed by the CRC Inbound process.
Processing Status	Displays the processing status.
Update Processing Status	Click to update the processing status. Use as the **Update Status** button in the EC Queue Review page for CommonLine 4 loans. For rows with document type request, you can modify the processing status between *Generated XML* and *Outbound to Stage.* You can modify the processing status to regenerate an XML file or to prevent a file from being created. For rows with document type response, you can modify the processing status between *XML Loaded to Stage* and *XML Processed.*You can set the status to *XML Processed* to prevent the file from being processed by the CRC Inbound.
Document Type	Indicates a request (outbound) or response (inbound) file.

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Field or Control	Description
Document ID	Displays the unique identifier of the file. Sometimes referred to as the CommonLine Batch ID.

Transmission Info Tab

Select the Transmission Info tab.

View the source and recipient of the CRC documents on this page.

Process Info Tab

Select the Process Info tab to view when the CRC document was loaded or created.

The fields indicate when the CRC document was created and when the document file was loaded into the staging tables (Response) or when the XML file was created (Request).

Override Tab

Select the Override tab.

When a document row has a processing status of *Outbound to Stage,* the **File Path** field can be edited. This allows you to correct the physical destination of the outgoing XML file that is generated.

Monitoring CRC Award Load Status

Access the CRC Award Management page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **CRC Award Management**).

Use this page to monitor the status of XML response files that have been loaded into the database. In particular, monitor those response records that have not yet been loaded or have an error status after the CRC Inbound process has been run.

Field or Control	Description
Filter by Award Status	Select the award status for filtering loan award records. Award status values are: *Error:* The record failed to be processed. Check the error reason. *Processing Complete:* The record was successfully processed and the loan has been updated. *Skipped Record:* Manually set by the user to indicate that the record should no longer be processed. *Unprocessed:* Initial value assigned when the record is first loaded into the staging tables.
Award Status	The values are: *Error, Processing Complete, Skipped Record,* and *Unprocessed.*

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Field or Control	Description
Error Reason	The following are descriptions of why the award record has an error status. The values are: *Award Disbursement Discrepancy* *Loan Certification Rqst* (loan certification request) *Destination Not Found* *Processing Error* *Loan On Hold* *Loan Not Found* *No Errors* *Process Not Supported* *Source Data Corruption* *Loan Tolerance Amt Exceeded* (loan tolerance amount exceeded) *Unknown or Invalid Loan Type* *Uninitiated Change*

See Reviewing CL 4 Status and Phase Codes.

Loan Information Tab

Select the Loan Information tab.

Field or Control	Description
Loan Status Codes	Click to review the guarantor, lender, promissory note, and credit status codes.
View Record	Click to access the CRC inquiry pages to view the complete application record that was received.

Reviewing and Managing CL 4 Loan Files

As you run the EDI Manager processes to either create or load CommonLine 4 files into the system, the system generates high level information that you can review in the EC Queue Review component.

This section discusses how to view CommonLine 4 EC queue records.

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Page Used to Review and Manage CL 4 Loan Files

Page Name	Definition Name	Navigation	Usage
EC Queue Review (electronic commerce queue review)	FA_LN_EDI_ECQUEUE	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Review CL 4 File Transactions**, and then **EC Queue Review**	Review files that were either created (outbound) or loaded (inbound) by EDI Manager.

Viewing CL 4 EC Queue Records

Access the EC Queue Review page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Review CL 4 File Transactions**, and then **EC Queue Review)**).

This page displays information for all loan files processed by EDI Manager in the selected loan type. Use this component to verify the status of each file, control the processing of files, and diagnose EDI Manager problems.

Field or Control	Description
Trans ID (transmission identification)	Displays the EDI Manager map name. For CommonLine 4, the system uses the file ID. This is also part of the search record for the component so that you can select only the files types you want to see. The values are: *A004P:* Application Send *C004P:* Change Transaction Send *R004P:* Application Response *E004P:* EFT roster
EC Driver DateTime (electronic commerce driver date time)	Displays the date and time that the inbound EC agent process loaded the file into the staging tables for inbound files. Displays the date and time the outbound EC agent created the loan file for outbound files.
EC Queue Control Number (electronic commerce queue control number)	Displays the file batch ID for outbound loan files. For inbound loan files, the system displays the file source name.

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Field or Control	Description
Update Status	Click to change the EC Queue status value. The EC Queue Status informs you of the state of the file represented by each row in the grid. A value of *Loaded* indicates that for incoming files the system has loaded the file into the staging tables, but the data in the file has not been completely processed. For outgoing files, this indicates that the system moved the application files into the staging tables, but the physical file has not yet been created. A value of *Processed* indicates that for incoming files the system resolved all of the records in the file, and the file should no longer be processed. For outgoing files, this indicates that the system created physical files and no further processing is required. Use the **Update Status** button to exercise special control over your loan files. For example, you can regenerate outbound files that may have become lost by changing the status from *Processed* to *Loaded.* The regenerated file is identical to the one lost. To control the order in which multiple loaded files are processed, change the status from *Loaded* to *Processed* to prevent the system from processing the file. Then update the status back to *Loaded* when you want the file to be processed.

Bus Unit/Cust/Vndr Info Tab

Select the Bus Unit/Cust/Vndr Info tab.

Field or Control	Description
Business Unit	For outbound files only. The EC entity code used to represent the business unit responsible for the loan. This value corresponds with the loan transfer ID page setup information for the transaction ID value.
EC BU Cd (electronic commerce business unit code)	For outbound files only. Indicates the EC entity code that represents the greater university. This value corresponds with the loan transfer ID page setup information for the transaction ID value.
Cust/Vndr (customer/vendor)	For outbound files only. The loan destination profile ID.

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Field or Control	Description
EC Ext Cd (electronic commerce external code)	For outbound files only. Indicates the EC entity code that represents the external loan entities. This value corresponds with the loan transfer ID page setup information for the transaction ID value. **Note:** For outgoing files, if the business unit, EC BU Cd, Cust/Vndr, and EC Ext Cd fields are blank, this means that the Loan Transfer ID setting have not yet been created. Files cannot be created until this setup is completed each year for CommonLine 4 loans.

Receiving and Processing CRC Inbound Files

This section provides an overview of CFC disbursement files and discusses how to:

- Load CRC inbound files to staging tables.
- View CRC inbound details.
- Process CRC inbound files from staging tables to application tables.

Understanding CRC Disbursement Files

The system supports loading both CRC disbursement roster and disbursement forecast roster files into the database. The system loads disbursement forecast files into the staging tables but not to the application tables. You can create reports to identify potential disbursement problems before you receive the subsequent disbursement roster file.

For the system to load the disbursement roster record into the application tables, the record must match an existing originated loan record. The records must match by unique CommonLine loan ID, loan type, and disbursement number fields. The system does not verify that the disbursement amounts match. Depending on the disbursement method indicated for each disbursement record, the posting is of a disbursement action row with a distinct loan action code.

Pages Used to Receive and Process CRC Inbound Files

Page Name	Definition Name	Navigation	Usage
Load CRC XML Files	SFA_RUNCTL_CRC_IN	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Inbound CRC XML Files**, and then **Load CRC XML Files**	Load CRC application response files into staging tables.

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Page Name	Definition Name	Navigation	Usage
CRC Student	SFA_CRC_STUDENT	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Staging Table Records**, and then **CRC Student**	View the CRC data loaded into staging tables.
Inbound CRC Files	SFA_RUNCTL_CRC_IN2	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CRC Inbound Files**, and then **Inbound CRC Files**	Move files into the database.

Loading CRC Inbound Files to Staging Tables

Access the Load CRC XML Files page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Inbound CRC XML Files**, and then **Load CRC XML Files**).

Use this process to load Application Responses, Disbursement Rosters and Certification Requests. The program differentiates the CRC file type by the <DocumentTypeCode> XML tag found in the beginning of the files.

Enter the path and name of the CRC file you are loading. You can process multiple files by adding additional rows on the page.

Viewing CRC Inbound Details

Access the CRC Student page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Staging Table Records**, and then **CRC Student**).

The following table lists the CommonLine 4 record status codes and the equivalent CRC loan status codes.

CommonLine Release 4 Record Status Code	CRC Guarantor Status Code	CRC Lender Status Code	CRC Promissory Note Status Code	CRC Credit Status Code
B (Guaranteed, pnote received)	40	45	60	Any
G (Guaranteed)	40	Any except 45	Any except 60	Any
or	40	45	Any except 60	Any
or	40	Any except 45	60	Any
T (Terminated)	35	Any	Any	Any
or	Any except 40	30	Any	Any
D (Denied-Rejected-Incomplete)	30	Any except 30	Any	Any
or	Any except 40, 35	25	Any	Any

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CommonLine Release 4 Record Status Code	CRC Guarantor Status Code	CRC Lender Status Code	CRC Promissory Note Status Code	CRC Credit Status Code
P (Pending processing)	25	Any except 25, 30	Any	Any
or	Any except 40, 35, 30	20	Any	Any
A and I (In process)	Any combination of codes except for the ones reflected above signify an "in process" status			

Processing CRC Inbound Files from Staging Tables to Application Tables

Access the Inbound CRC Files page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CRC Inbound Files**, and then **Inbound CRC Files**).

Field or Control	Description
Application Response	Select to process response records from the staging table to the application table.
Disbursement Roster	Select to process disbursement or EFT records from the staging table to the application table.
Certification Request	Select to process certification request records from the staging table to the application table.

After running the CRC inbound process, review all award records that did not load. Use the CRC Award Management page to review the awards in error. Review the load error code table for information on the possible error codes and how to resolve the error condition.

Application Response File Processing

The CRC loan inbound process attempts to match the loan application response record in the staging tables to an originated loan in the application database by comparing the CommonLine loan application IDs. When a match is found, the process updates the loan status by converting the CRC guarantor, lender, promissory note, and credit status codes into the record status code field used in CommonLine 4.

Refer to the CommonLine 4 record status code table for additional information.

Disbursement Roster Processing

You can load CRC disbursement roster and disbursement roster files into the database. First, run the CRC XML Inbound process to load the information into the CRC staging tables. Next, run Process CRC Inbound to process the records into the application tables. The system does not load disbursement forecast files into the application tables. You can create reports to identify potential disbursement problems prior to the receipt of the subsequent disbursement roster file.

For the system to load the disbursement roster record into the application tables, the record must match an existing originated loan record. The records must match in the unique CommonLine loan ID, the loan type, and the disbursement number fields. The system does not perform a check to verify that the disbursement amounts match. Depending on the

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disbursement method indicated for each disbursement record, the posting is of a disbursement action row with a distinct loan action code.

The following table lists the action codes to use for various disbursement methods.

If the Disbursement Method is:	Post a Loan Action Code of:	Can it be Disbursed to the Student's Account?
EFT	D – EFT Disbursement Received	Yes
Master Check	M – Disb Received by Master Check	Yes
Individual Check	I – Paper Check Notification Rcvd	No
Netting	PSN – Disb Received via Netting	Yes
By Lender	PSDL – Direct Disbursement by Lender	No

Receiving and Processing CL4 Inbound Files

This section discusses how to:

- Load CL 4 inbound files to staging tables.
- View CL 4 inbound application response details.
- View CL 4 inbound EFT details.
- Process CL 4 inbound files from staging tables to application tables.
- Review CL 4 status and phase codes.

Pages Used to Receive and Process CommonLine Inbound Files

Page Name	Definition Name	Navigation	Usage
Run Control Parameters	EC_RUN_INBOUND_01	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Inbound EC Agent**, and then **Run Control Parameters**	Load inbound CommonLine 4 application response or EFT files into staging tables.
CommonLine 4 Import - Header	CL_IMP_HEAD4	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CL 4 Response Records**, and then **CommonLine 4 Import**, and then **Header**	View the information in the CommonLine application response header record.

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Page Name	Definition Name	Navigation	Usage
Application Detail	CL_IMP_MAIN4	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CL 4 Response Records**, and then **Application Detail**	View inbound application details. This includes information about each record in the EDI Manager staging tables.
Borrower Perm Address (borrower permanent address)	SEC_IMP_ADDR	Click the **Address** link on the Application Detail page.	View borrower permanent address information.
EFT Information (electronic funds transfer information)	CL_EFT4_HEAD	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CL 4 EFT Records**, and then **EFT Information**	View electronic funds transfer information to verify data loaded into the EDI Manager staging tables.
CommonLine Inbound	RUNCTL_CLIN	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CL 4 Inbound Files**, and then **CommonLine Inbound**	Move selected acknowledgment files from EDI Manager staging tables into the database.
Loan Actions Codes	LOAN_ACTNCD_TBL	**Financial Aid**, and then **Loans**, and then **View Loan Action Codes**	View CommonLine 4 status and phase codes.

Loading CL 4 Inbound Files to Staging Tables

Access the Run Control Parameters page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Inbound EC Agent**, and then **Run Control Parameters**).

Use this page to initiate the Inbound EC Agent process (ECIN0001), an SQR report, which loads information from application response or EFT files into staging tables.

> **Note**
>
> Do not make any changes in the **File Options** group box.

Run Option

Field or Control	Description
Single File	Select if only one file is to be loaded.

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Field or Control	Description
File List Driven	Select if you have created a file list to be loaded. Enter the file list name and location. Refer to the following table for file names to use.
Single Instance	Not used in Financial Aid.

Inbound Agent Parameters

Field or Control	Description
Single File Path	Enter the path where the file is located. The syntax varies based on your network environment.
Single File Name	Enter the name of the file in this field.

Force Profile

Field or Control	Description
Do Not Force ((998 or 999 in file)	Select to not use inbound agent forced parameters.
Force with Map Information (998)	Select to enter parameters necessary to load the loan files. The parameters include an EC map ID, profile ID, and convert file ID.
Force with Partner Information (999)	Select to enter parameters necessary to load the loan files. The parameters include an external entity code, forced transaction ID, external trading partner ID, internal alias entity code, and an EC alias trading partner ID.

Inbound Agent Forced Parameters

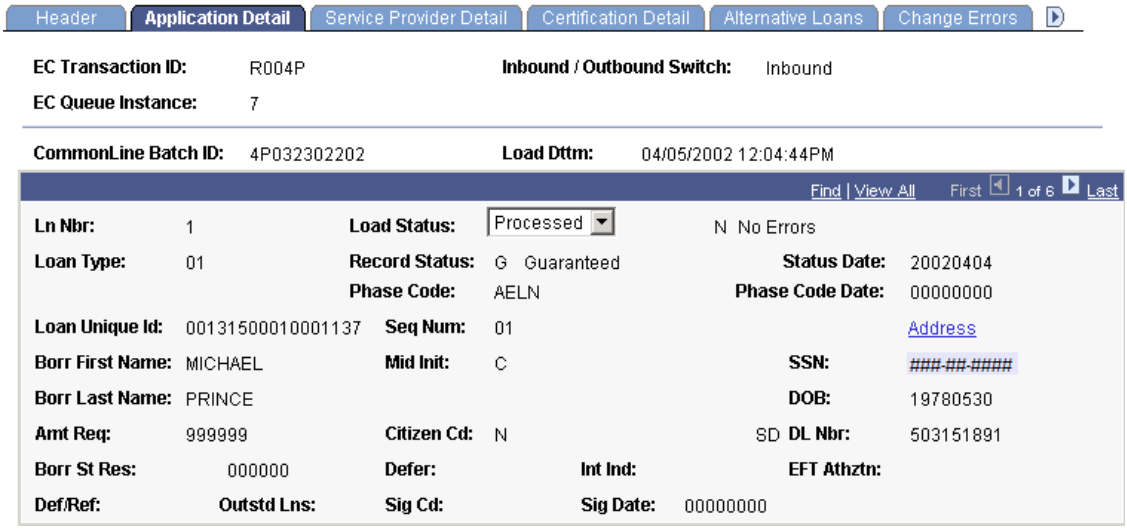
Field or Control	Description
EC Map ID	Select an inbound ID file to load. CommonLine choices for particular file names and types. Values are: *CL_APP_V4:* where file name is R004P and file type is CommonLine 4 application response file. *CL_EFT_V4:* where file name is E004P and file type is CommonLine 4 EFT roster.
EC Profile ID	Select *CL_DESTIN* for CommonLine loan files. You can also create your own profile ID with EDI Manager.
EC Convert Profile ID	Select *COMMONLINE* to load inbound CommonLine files.

Viewing CL 4 Inbound Application Response Details

Access the Application Detail page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CL 4 Response Records**, and then **Application Detail**).

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



Field or Control	Description
Load Status	Indicates the load status of the record. Values are: *Processed:* the record has been used to update the loan application record. *Unprocessed:* the default status indicating that the record has been loaded into the staging tables, but the CL Inbound process has not been run. *Skipped:* a value set manually to indicate that the record should not be processed. *Error:* the CL inbound process could not successfully process the record. View the error reason text that displays next to the field.
Record Status	Displays the status of the loan reported by the loan servicer on the application response record. You can review the record status table for the complete list of valid values. See Reviewing CL 4 Status and Phase Codes.
Status Date	Displays the date the record status occurred. For example, the date when the loan was guaranteed.
Phase Code	Corresponds to field 133 on the application response detail record. This is a more detailed status code communicated between the lending agencies.
Phase Code Date	Displays the date the phase code became active.
DL Nbr (driver's license number)	Displays the borrower's driver's license number.
Borr St Res (borrower state residence)	Displays the date the borrower became a legal resident of the identified state.

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Field or Control	Description
Defer (deferment)	Indicates the authorization for the lender to defer repayment periods. The borrower requests to defer principal payments while attending school.
Int Ind (interest indicator)	Indicates whether the borrower intends to pay the interest on the unsubsidized Federal Stafford or Federal PLUS loan while in school and when the loan is in grace or deferment.
EFT Athztn (electronic funds transfer authorization)	Indicates that the borrower has authorized the school to transfer the loan proceeds received by EFT to the appropriate student account.
Def/Ref (default/refund)	Indicates whether the PLUS/alternative student is currently in default on a student loan or owes a refund on a federal grant.
Outstd Lns (outstanding loans)	Indicates whether the borrower has outstanding loans.
Sig Date (signature date)	Indicates the date the valid promissory note was signed.
Address	Click to access the Borrower Perm Address page to view borrower permanent address information.

Viewing CL 4 Inbound EFT Details

Access the EFT Information page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CL 4 EFT Records**, and then **EFT Information**).

Processing CL 4 Inbound Files from Staging Tables to Application Tables

Access the CommonLine Inbound page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CL 4 Inbound Files**, and then **CommonLine Inbound**).

Use this page to run the CommonLine 4 Inbound Driver process, a COBOL SQL process.

Field or Control	Description
Application Resp (application response)	Select to process all CommonLine 4 application response records from the EDI Manager staging table into the application database.
EFT Load	Select to process electronic fund transfer records to the database. After EFT records have been processed, they automatically become eligible for disbursement to the student's account.

Reviewing CL 4 Status and Phase Codes

Access the Loan Action Codes page (**Financial Aid**, and then **Loans**, and then **View Loan Action Codes**).

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The CommonLine 4 loan inbound process uses the CommonLine 4 ID to match the loan application response record in the staging tables to an originated loan in the application database. When a match is found, the process loads both the record status code field 2 on the application response detail record and the phase code field 133 on the application response detail loan origination action records. The record status code provides a high-level status of the loan, while the phase code provides a detailed status.

> **Note**
>
> You can view the record status codes and application phase codes on the Loan Action Codes page.

In addition to loan origination action codes, the system generates a disbursement action record if a change of status occurs for a specific disbursement. Fields 120, 121, 122, and 123 on the application response detail record indicate changes to the disbursements. If the inbound process cannot load the record, the system generates an error code. Review the load error code table for additional details.

Record Status Codes

The following table lists record status codes that are specific to CommonLine 4 loans.

Code	Description	Load Action
A	Initial processing successful. Guarantees or obtains guarantee upon receipt of the promissory note.	A loan origination action message is posted for the loan.
I	Initial processing successful. Pending further approval.	A loan origination action message is posted for the loan.
G	Guaranteed.	A loan origination action message is posted. The loan approved amounts, disbursement information, MPN, and additional CommonLine 4 information are updated.
B	Guaranteed. Promissory note received and approved for disbursement.	Same as G.
P	Pending processing. (Error resolution underway by sending organization.)	A loan origination action message is posted.
D	Denied/rejected/incomplete. No further processing unless school, borrower, or lender provides updated data.	A loan origination action indicating the reject is posted, along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
C	School certification requested for application.	Load errors. Use report to process manually.
M	Modification to previously reported guarantee.	Same as G.

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Code	Description	Load Action
N	Response to reprint request.	A loan origination action message is posted.
R	Response to transactions submitted in change transaction send file.	A loan origination action message is posted.
T	Termination record. No action required.	A loan origination action message is posted.

Application Loan Phase Codes

The following table lists application loan phase codes.

Code	Description	Load Action
ASCH	Received transmission from school.	A loan origination action message is posted.
RECA	Received application/ promissory note. Has yet to be approved for disbursement.	A loan origination action message is posted.
AWPN	Received application. Awaiting promissory note.	A loan origination action message is posted.
AABI	Awaiting additional borrower information.	A loan origination action message is posted.
AAIG	Awaiting additional information from guarantor.	A loan origination action message is posted.
AAIL	Awaiting additional information from lender.	A loan origination action message is posted.
AAIN	Awaiting additional information.	A loan origination action message is posted.
AAIS	Awaiting additional information from school.	A loan origination action message is posted.
AINP	Processing for submission to guarantor.	A loan origination action message is posted.
ASGU	Submitted to guarantor.	A loan origination action message is posted.
AWCR	Awaiting credit approval.	A loan origination action message is posted.
CRED	Credit approved.	A loan origination action message is posted.
AELN	Approved by guarantor. Not dependent on credit check.	A loan origination action message is posted.
ADIS	Awaiting first disbursement.	A loan origination action message is posted.
PRNT	Application and promissory note has been printed and mailed.	A loan origination action message is posted.
DPRT	Reprint request denied.	A loan origination action message is posted.
SERV	Servicing (first disbursement has been made).	A loan origination action message is posted.

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Code	Description	Load Action
RDCT	Reduced disbursement amount.	A loan origination action message is posted.
ALRJ	Rejected by lender.	A loan origination action indicating the reject is posted along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
AGRJ	Rejected by guarantor.	A loan origination action indicating the reject is posted along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
RJCT	Rejected due to processing problems.	A loan origination action indicating the reject is posted along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
ATEL	Completing telephone follow-up to resolve problems.	A loan origination action message is posted.
AXCP	Performing exception processing. Resolving special problems.	A loan origination action message is posted.
HOLD	Holding while resolving outstanding problems.	A loan origination action message is posted.
AREP	Reprocessing	A loan origination action message is posted.
ATRM	Terminated loans have been withdrawn or cancelled.	A loan origination action message is posted.

Inbound File Load Error Codes

The following table describes errors and how they can be resolved. Set error records that do not require resolution to *Skipped.* This action removes them from the CL 4 App Response Error report. These codes are common to both CL4 and CRC.

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Code	Description	Error Resolution
A – Award Discrepancy	Gross disbursement amounts could not be synchronized. See "Understanding the Inbound File Process."	Repackage the student so that the gross amounts match. **Note:** Do not use the CommonLine Loan Orig Trans page to auto-accept the loan instead of repackaging the student. Because the application load process now automatically reconciles differences between the loan and the student awards, we no longer recommend this procedure.
C – Loan certification request	All loan certification request records produce errors.	Follow the documented school certification request processing procedures.
D – Loan Destination not found	The load process was unable to determine the loan destination profile of the guaranteed loan. This occurs when institutions originate loans without a lender specified.	Create a loan destination using the lender and guarantor information on the Application Response record.
E – Processing Error	Possible data corruption in the application tables. Refer to your systems administrator for assistance.	Check for missing PS_LOAN_ORIG_DTL records, missing PS_LOAN_DISB_ACTN rows, or a discrepancy between the number of disbursements in the student's award and. the number of disbursements listed in the application response record.
H – Loan on hold	The record does not load because the originated loan is in Hold status.	Resolve the hold condition and remove the Hold status in the Originate Loan component.
L – Loan not found	The application response record could not be matched to an originated loan using the CommonLine ID values.	If the origination record exists, either manually change the school's loan application ID to match the CommonLine ID or get the loan agency to change the CommonLine ID to match loan application ID.
N – No Errors	Assigned when the loan response record is loaded successfully.	
P – Process Not Supported	The CRC response file is a type not supported or recognized by the system	Set to skip.

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Code	Description	Error Resolution
S – Source Data Corruption	Loan servicer information is incorrect. One of the following is true: • The application response record has a record status of B (guaranteed, promissory note received), G (guaranteed), M (modification to previously reported guarantee), or R (change response), and the sum of the net amount, loan fees, and fees paid does not match the gross amount for any disbursement for a guaranteed loan. • The application response record has a record status of B or G, and the sum of the gross disbursement amounts does not equal the loan approved amount. • The application response record for a combination Stafford loan, with a status other than G, does not have a sequence of 00 (field 25 on the CommonLine 4 application response file).	For the first, request a new application response file from your loan servicer where the loan disbursement information is now correct and the gross amount = (loan fees - fees paid) + net amount. For the second, request a new application response file from your loan servicer where the loan disbursement and approved amount information is now correct. For the third, request a new application response file from your loan servicer or manually fix and reprocess the file.
U – Unknown or invalid loan type	An unknown or invalid CommonLine loan type is defined for the application response record. Only the CommonLine 4 defined loan type codes (field 17) are acceptable.	Ask the loan servicer to reissue the application response record with a corrected loan type code value.
X – Uninitiated Change	A response to an uninitiated change response to the student's loan was received.	Review the changes made to the loan and make the appropriate changes to the loan manually. This may require running loan origination adjustments and then manually accepting the change using the CommonLine Loan Orig Trans page.

After you resolve any load errors, rerun the CommonLine loan inbound process to reprocess any records set to Error.

Two CL 4 reports can assist you in processing of load errors: the CL 4 App Response Load Error report and the CL School Cert Request report.

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Managing Loans on Hold

Loans that are rejected by the loan servicer are automatically placed on hold and must be reviewed by the user. Loans can also be placed on hold if a data integrity error exists during the CommonLine outbound process. At the discretion of the financial aid administrator, a loan can be placed on hold indefinitely until released by the administrator. Loans placed on hold are not selected for processing by the system until corrective action is performed and the hold status is manually removed from the loan. Run the CL Loans on Hold report to identify the loans which require review.

This section discusses how to:

- Review loans on hold.
- Review loan origination and loan action status.
- Review loan disbursement detail.

> **Note**
>
> You can also use the CommonLine Loan Orig Trans component to release loans on hold.

Related Topics

- Managing Loan Origination Transmission Data
  This section discusses how to:

Pages Used to Manage Loans on Hold

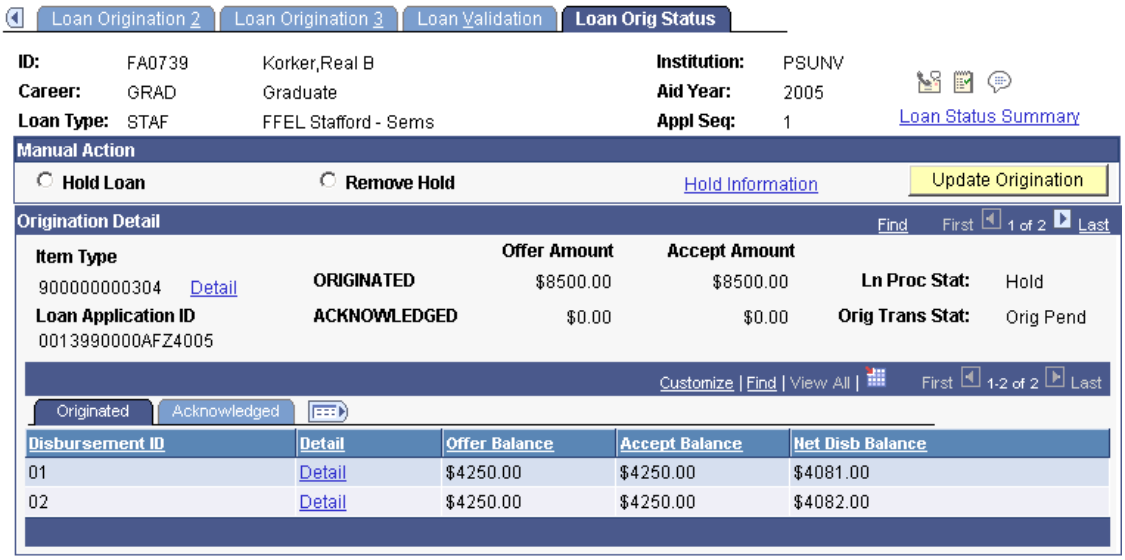
Page Name	Definition Name	Navigation	Usage
Loan Orig Status (loan origination status)	SFA_CRC_ORIG_STAT	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Orig Status**	Hold and release loans in hold status and synchronize the data between your institution and loan destinations.
Hold Information	SFA_CRC_LN_HLD_SBP	Click the **Hold Information** link on the Loan Orig Status page.	View reason CRC loan placed on hold.
Origination Detail	LN_ORIG_TRANS_SEC	Click the **Detail** link in the Origination Detail group box on the Loan Origination Status page.	Review loan origination and loan action status detail.
Disbursement Detail	LN_DISB_TRANS_SEC	Click the **Detail** link on the Originated tab on the Loan Origination Status page.	Review loan disbursement detail.

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Reviewing Loans on Hold

Access the Loan Orig Status page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Orig Status**).

This example illustrates the fields and controls on the Loan Orig Status page: Originated tab. You can find definitions for the fields and controls later on this page.



Loans placed on hold are identified with a Ln Proc Stat (Loan Processing Status) value of *Hold.*

Manual Action

Field or Control	Description
Hold Loan	When you select this option and click the **Update Origination** button, the system changes the **Ln Proc Stat** (loan processing status) field to *Hold.*
Remove Hold	When you select this option and click the **Update Origination** button, the system resets the Ln Proc Stat field to *Orig Pending.*
Hold Information	Click to view the hold reason. For CRC loans, the system activates this link if the loan is placed on hold.

> **Note**
>
> If you initiate or remove a hold, you must save changes before leaving the component. Do not remove a hold without also resolving the hold condition.

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Originated Detail

Field or Control	Description
Ln Proc Stat (loan processing status)	Displays the current status of the originated loan. Values are: *Cancel:* A loan origination application that was previously in service is now cancelled. *Hold:* Holds all processing for any loan origination applications of this loan type. Applications can be placed on hold manually or from an incoming acknowledgment resulting in an error. *In Service:* A loan origination application has been transmitted by the institution. *Orig:* A loan origination application has been created by the institution. *Terminated:* The loan origination application was terminated by the institution prior to moving to a status of *In Service*.
Orig Trans Stat (origination transmission status)	Displays transmission activity status for the loan origination. Values are: *Pending:* A loan origination application has been created but not yet validated or transmitted. *Trans:* The transmitted origination record has been converted to a flat file and sent to the lending institution. *Accepted:* An origination acknowledgment has been received, indicating the loan is accepted. *Chg Pend:* A financial adjustment change in award amount has been made, and the changes have been originated as an Origination Change record. *Error:* The loan origination application has been returned with errors. This status sets the loan processing status to *Hold*.
Detail	Click to access the Origination Detail page and view more details about the loan origination and the loan action status.

Originated Tab

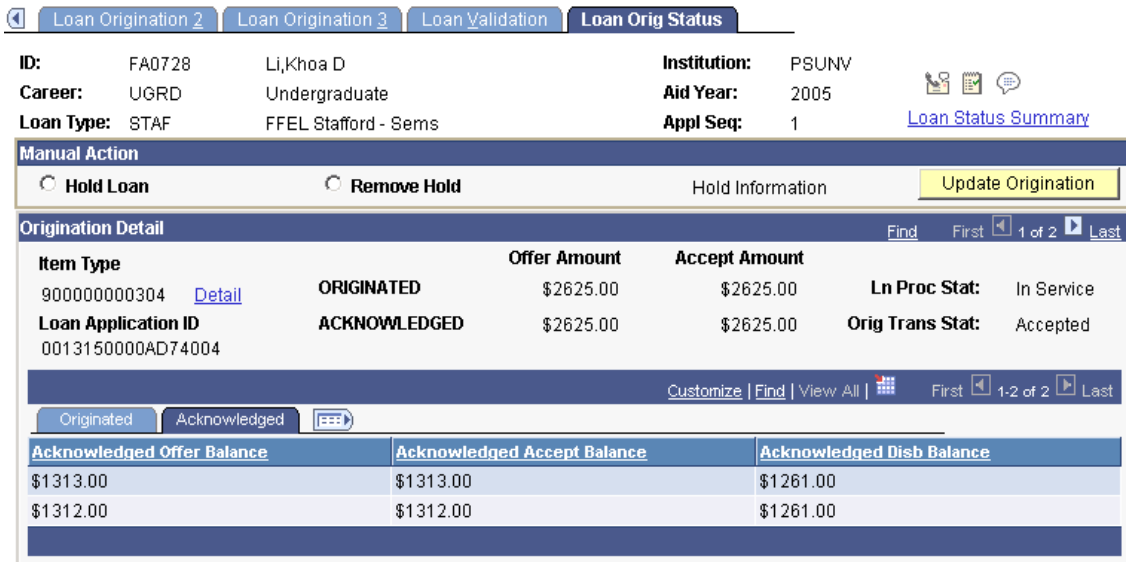
Field or Control	Description
Detail	Click to access the Disbursement Detail page and view information regarding the disbursement for the loan.

Acknowledged Tab

Select the Acknowledged tab.

This example illustrates the fields and controls on the Loan Orig Status page: Acknowledged tab. You can find definitions for the fields and controls later on this page.

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Use to view disbursement information received from the servicer.

Hold Action Value Changes

The loan processing status is updated when a hold is manually initiated.

Original Loan Process Status Value	New Loan Process Status Value
Offered	Offered (no change)
Terminated	Terminated (no change)
All other values	Hold

Hold Removal Value Changes

The system updates the loan processing and original transaction status when a hold is manually removed.

Original Loan Process Status Value	Original Origination Transaction Status Value	New Loan Process Status Value	New Origination Transaction Status Value
Hold	Accepted (Cert amount > 0)	In Service	Accepted
Hold	Accepted (Cert amount = 0)	Cancelled	Accepted
Hold	Error (Cert amount > 0)	In Service	Error
Hold	Error (Cert amount = 0)	Cancelled	Error
Hold	Transmitted (Cert amount > 0)	In Service	Transmitted
Hold	Transmitted (Cert amount = 0)	Cancelled	Transmitted
Hold	Change Pending (Cert amount > 0)	In Service	Change Pending

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Original Loan Process Status Value	Original Origination Transaction Status Value	New Loan Process Status Value	New Origination Transaction Status Value
Hold	Change Pending (Cert amount = 0)	Cancelled	Change Pending
Hold	Originated	Originated	Originated

Reviewing Loan Origination and Loan Action Status

Access the Origination Detail page (click the **Detail** link in the Origination Detail group box on the Loan Origination Status page).

This example illustrates the fields and controls on the Origination Detail page: Action Status tab. You can find definitions for the fields and controls later on this page.



Use to review loan activity.

The system displays current application information and loan action status. The system calculates the amounts in the **Originated** column at the time the loan is originated. Values in the **Acknowledged** column are received from the loan servicer.

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Action Status Tab

Field or Control	Description
Seq # (sequence number)	The origination action sequence is generated from the loan record activity. You can scroll to view each subsequent sequence for this loan. Click **View All** to view all origination actions that have occurred. For CommonLine 4 loans, the **Phase Code** field may be populated.

CRC Status Tab

Select the CRC Status tab.

The system displays the lender, guarantor, promissory note, and credit status codes for CRC loans. For a complete list of status codes and their meaning, use the CRC Loan Action Code Table. Access the table by selecting **Set up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CRC CommonLine**, and then **Maintain CRC Loan Status Codes.**.

Reviewing Loan Disbursement Detail

Access the Disbursement Detail page (click the **Detail** link on the Originated tab on the Loan Origination Status page).

Use to review the activity of the selected disbursement.

Field or Control	Description
Sequence	Indicates the disbursement sequence number. This is the sequence in which loan disbursement actions were generated.

Processing Loan Changes

The processes discussed in this section are for making changes for both CRC and CL4 unless indicated.

This section provides an overview of changes to originated loans and discusses how to:

- Change loan dates and student grade level.
- Change loan period start and end dates.
- Change the student's grade level and graduation date.
- Generate and view @1–07 loan adjustment information.
- Process cancellations and reinstatements.
- Process disbursement-level changes.
- Process loan increases.
- Process address, phone, and email address changes for CRC loans.
- Create change transaction files.
- Receive and process change application response files.

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- Accept change transactions manually.

Understanding Changes to Originated Loans

The Campus Solutions system supports CommonLine change transaction processing for both versions of CommonLine, the newer Common Record CommonLine (CRC) and the older CommonLine 4 (CL 4). Changes to loan period, cancellations, reinstatements, reissues, and increases are supported. For CRC, changes to address, phone, and email are also supported. Most changes in loan eligibility result from changes to the student's award package, but changes to a loan might be required for loan period dates or anticipated graduation dates. You can make multiple changes to a single loan that generates multiple change transaction types at the same time. The loan origination process determines when changes occur and generates change transaction records to be sent to loan service providers.

When a change causes a paid disbursement to be reduced, the disbursement is suspended. Disbursed funds remain disbursed and must be reviewed, reconciled, and possibly returned to the lender. Increases in loan eligibility may result in either an increase in the existing loan award, or the creation of a new loan if the borrower's requested amount exceeds the promissory note amount.

The change business processing flow for CommonLine FFELP and alternative loans using either CRC or CL 4 is as follows.

1. Changes are made to the student's loan eligibility.
2. Run the Loan Origination process with the Adjustments option selected. The system identifies the adjustments and changes the loan origination status.
3. When origination is complete, run the Loan Validation process to check the loan application for data discrepancies. Loans that fail validation are reprocessed in subsequent runs until validation is reached.
4. Run the CommonLine Loan Outbound process to process validated loans into outbound staging tables.
5. Run the File Creation process to create loan change files using the staging table information. CRC generates files in XML format and CL 4 uses ASCII files.

After you submit the change files to the loan servicers, they are processed and you are notified using receipt of response files for each loan processed (discussed in a previous section). After receiving the CommonLine response file from your loan servicer as an acknowledgment of the change transaction, run the CommonLine Inbound processes to inbound and process the response records.

The CommonLine 4 change process involves loan level and disbursement level changes as affected by disbursement status:

- Loan level changes include:
  - Loan Period Change (@1-07)
  - Loan Cancellation/Reinstatement (@1-08)
  - Loan Increase (@1-24)
- Disbursement level changes include:
  - Disbursement Cancellation/Changes (@1-09)
  - Disbursement Notification/Change (@1-10)

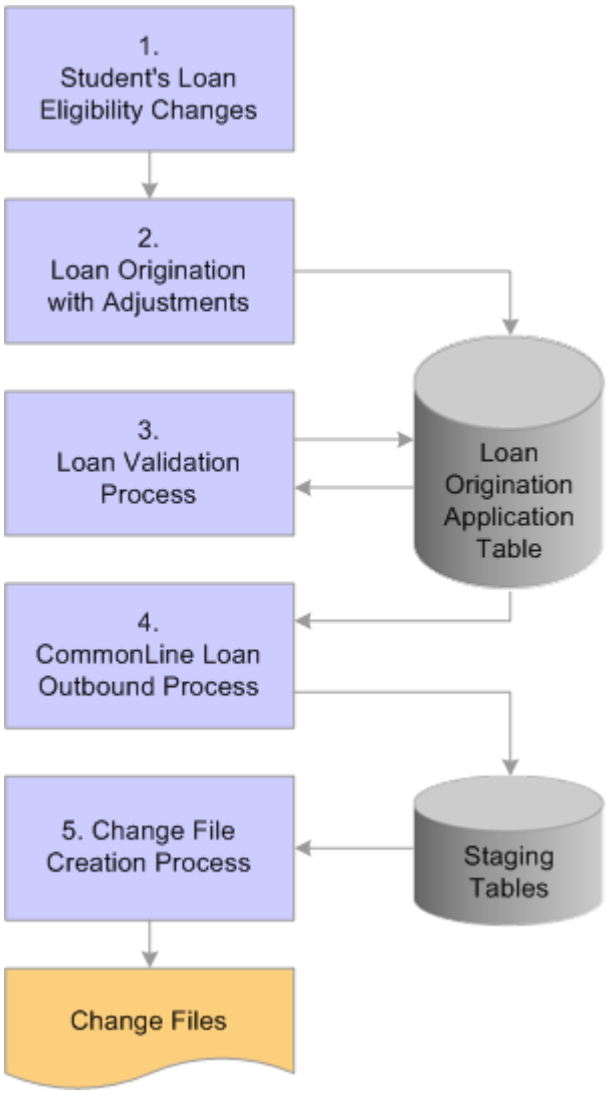
Whether disbursements have already been made to the school can also determine the change record type. An adjustment made to a borrower's loan can result in a single change record or a

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combination of change records. Because the loan origination program makes these decisions automatically, understanding the types of change records generated by an adjustment to a borrower's loan eligibility is useful for resolving any change record problems with your service providers.

The following illustration shows the flow of CommonLine loan change processing.

Loan change outbound process



Related Topics

- Setting Up Financial Aid Terms
  Access the FA Term Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Financial Aid Term**, and then **Setup Financial Aid Term**).
- Updating Borrower Information
  Access the Loan Origination 1 page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 1**).
- Managing Loan Origination Transmission Data
  This section discusses how to:

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- Processing Disbursement Level Changes
  Disbursement level changes occur when you make adjustments to individual disbursements of a guaranteed loan. Two types of CommonLine 4 change transaction record types communicate disbursement changes:
- Originating CommonLine Loans
  Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**).
- Viewing Loan Origination Information
  Access the Loan Origination Information page (click the **Origination Status** link on the Loan Application Summary page).
- Viewing Loan Origination Change
  Access the Loan Origination Change page (click the **Change** link on the Loan Origination Information page.
- Viewing Loan Period Change
  Access the Loan Period Change page (click the **Change** link on the Loan Origination Change page).

Pages Used to Process CommonLine Loan Changes

Page Name	Definition Name	Navigation	Usage
Loan Origination 2	SFA_CRC_LN_ORIG_FN	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 2**	Review and change loan start, end, certification, and scheduled disbursement dates. You can also hold loans or release loans from this page.
Loan Demographic Data	LOAN_ORIG_SEC2	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 1** Click the Loan Demographic link on the Loan Origination 1 page.	Update academic level, NSLDS loan year or graduation date for student records that have been updated on the FA Term record.
Loan Period Change	CL_CHX_DTL107_SEC	Click the **Detail 1-07** link on the Change Detail 2 page.	View 1-07 detail record information.
Loan Cancellation Loan Reinstatement	CL_CHX_DTL108_SEC	Click the **Detail 1-08** link on the Change Detail 2 page.	View 1-08 detail record information.
Disbursement Cancellation/Change	CL_CHX_DTL109_SEC	Click the **Detail 1-09** link on the Change Detail 2 page.	View 1-09 detail record information.
Disbursement Notification/Chng	CL_CHX_DTL110_SEC	Click the **1-10** button on the Change Detail 2 page.	View 1-10 detail record information.

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Page Name	Definition Name	Navigation	Usage
Loan Increase Detail	CL_CHX_DTL124_SEC	Click the **1-24** button on the Change Detail 2 page.	View 1-24 detail record information.
Trailer	CL_CHX_TRAL4	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CL 4 Change Records**, and then **Trailer**	View information contained in the trailer record for the CommonLine 4 change transaction send file.
Loan Application Summary	LOAN_ORIG_SUMM_DTL	**Financial Aid**, and then **Loans**, and then **View Loan Application Status**	View loan summary information and use links to access more detailed loan information.
Loan Origination Information	LOAN_ORIG_SEC	Financial Aid, Loans, View Loan Application Status. Click the **Origination Status** link on the Loan Application Summary page.	Determine whether the system has created a change transaction for the loan. View the CRC status codes and the corresponding CRC staging table information for the selected loan action row.
Origination Loan Disbursement	LOAN_DISBURSEMENT	Click the **Disbursement Status** link on the Loan Application Summary page.	Determine whether the system has created a disbursement level change transaction for the loan.
Loan Period Change	LN_CL_ORIG_CHG_07	Click the **Change** link on the Loan Origination Change page.	View 1-07 detail record information and CRC Recipient ID. This link or page is only available if a loan change has been processed in this category.
Loan Cancellation/ Reinstatement	LN_CL_ORIG_CHG_08	Click the **Change** link on the Loan Origination Change page.	View 1-08 detail record information and CRC Recipient ID. This link or page is only available if a loan change has been processed in this category.
Cancel/Reinstate Loan	LN_CL_ORIG_CHG_09	Click the **Change** link on the Loan Disbursement Change page.	View 1-09 detail record information. This link or page is only available if a loan change has been processed in this category.

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Page Name	Definition Name	Navigation	Usage
Post Disbursement Change	LN_CL_ORIG_CHG_10	Click the **Change** link on the Loan Disbursement Change page.	View 1-10 detail record information. This link or page is only available if a loan change has been processed in this category.
Loan Increase Change	LN_CL_ORIG_CHG_24	Click the **Change** link on the Loan Origination Change page.	View 1-24 detail record information and CRC Recipient ID. This link or page is only available if a loan change has been processed in this category.

Changing Loan Dates and Student Grade Level

You send information to loan agencies regarding changes to a borrower's loan period begin and end dates, student's grade level, and student's anticipated completion date through the transmission of the CommonLine 4 Change Transaction Loan Period Change @1-07 Detail record. This is a loan level adjustment. You can submit this loan change record before or after disbursement.

If you modify information in the Originate Loan component, the loan adjustment program automatically checks for changes to the student's program complete date (graduation date) and NSLDS loan year in the FA term record. You can then run the loan origination process with the **Adjustments** check box selected to generate an @1-07 change transaction record that reflects the changes.

To change the student's graduation date and NSLDS loan year without changing the loan award, or if you are not making other changes to the student's loan, follow the manual change processing instructions. You can use the Financial Aid Term component to change a student's graduation date and grade level.

Changes to the loan period start and end dates occur in the Originate Loan component. To change a student's graduation date, enter the expected graduation date. You can use the **NSLDS Loan Year** values to change the student's grade level.

> **Note**
>
> Changes to FA term information may require additional processing steps, such as running FA term build and student budget assignment.

After you change the expected graduation date and grade level for the appropriate FA term record, you must use the Originate Loan component to update any affected loan records. You can also change loan period begin and end dates in the component.

1. Click the **Loan Demographic** link to access the Loan Demographic Data page.
2. Select the **Demo Chg** (demo change) check box. Then select the changed term from the **Term**values.

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3. Click the **Update Term Data** button. Note that the system displays any changes made to the FA Term record. Click **OK** to return to the Loan Origination I page. Save the Loan Origination 1 page.

Related Topics

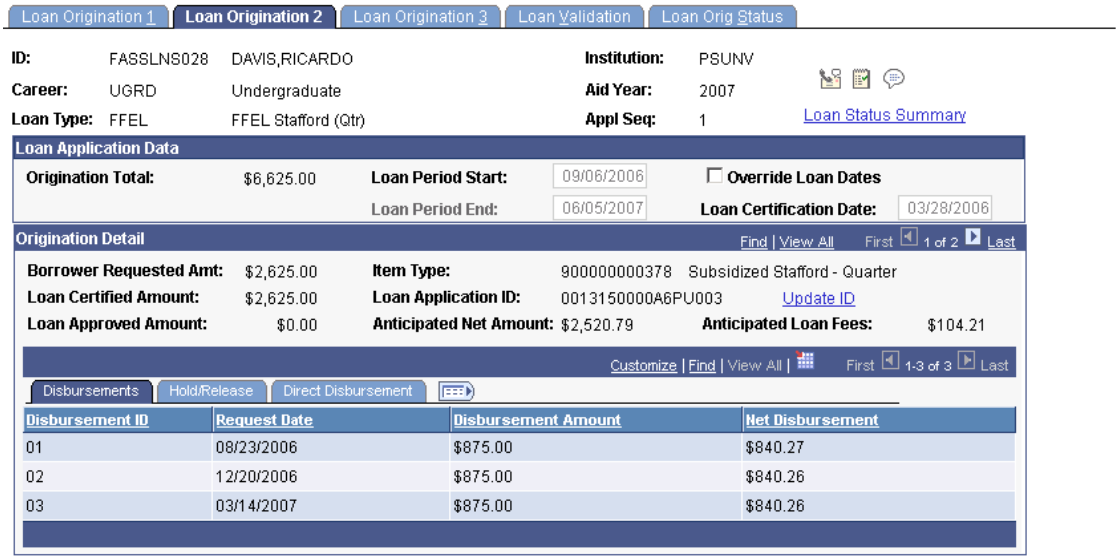
- Setting Up Financial Aid Terms
  Access the FA Term Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Financial Aid Term**, and then **Setup Financial Aid Term**).
- Updating Borrower Information
  Access the Loan Origination 1 page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 1**).
- Managing Loan Origination Transmission Data
  This section discusses how to:
- Processing Disbursement Level Changes
  Disbursement level changes occur when you make adjustments to individual disbursements of a guaranteed loan. Two types of CommonLine 4 change transaction record types communicate disbursement changes:
- Originating CommonLine Loans
  Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**).
- Viewing Loan Origination Information
  Access the Loan Origination Information page (click the **Origination Status** link on the Loan Application Summary page).
- Viewing Loan Origination Change
  Access the Loan Origination Change page (click the **Change** link on the Loan Origination Information page.
- Viewing Loan Period Change
  Access the Loan Period Change page (click the **Change** link on the Loan Origination Change page).

Changing Loan Period Start and End Dates

Access the Loan Origination 2 page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**, and then **Loan Origination 2**).

This example illustrates the fields and controls on the Loan Origination 2 page: Disbursements tab. You can find definitions for the fields and controls later on this page.

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You send information to loan agencies regarding changes to a borrower's loan period dates through the transmission of the CommonLine 4 Change Transaction Loan Period Change @1-07 Detail record. This is a loan level adjustment. You can submit this loan change record before or after disbursement.

After you make changes to the loan dates or disbursement dates, save the page.

Field or Control	Description
Override Loan Dates	Select this check box to make the date fields available for editing.
Loan Period Start and **Loan Period End**	Generated from the Valid Careers for Terms table. After changing the loan dates, save the page.

Disbursements

Use the Disbursements tab to change disbursement dates.

Field or Control	Description
Request Date	Change the disbursement date.

Changing the Student's Grade Level and Graduation Date

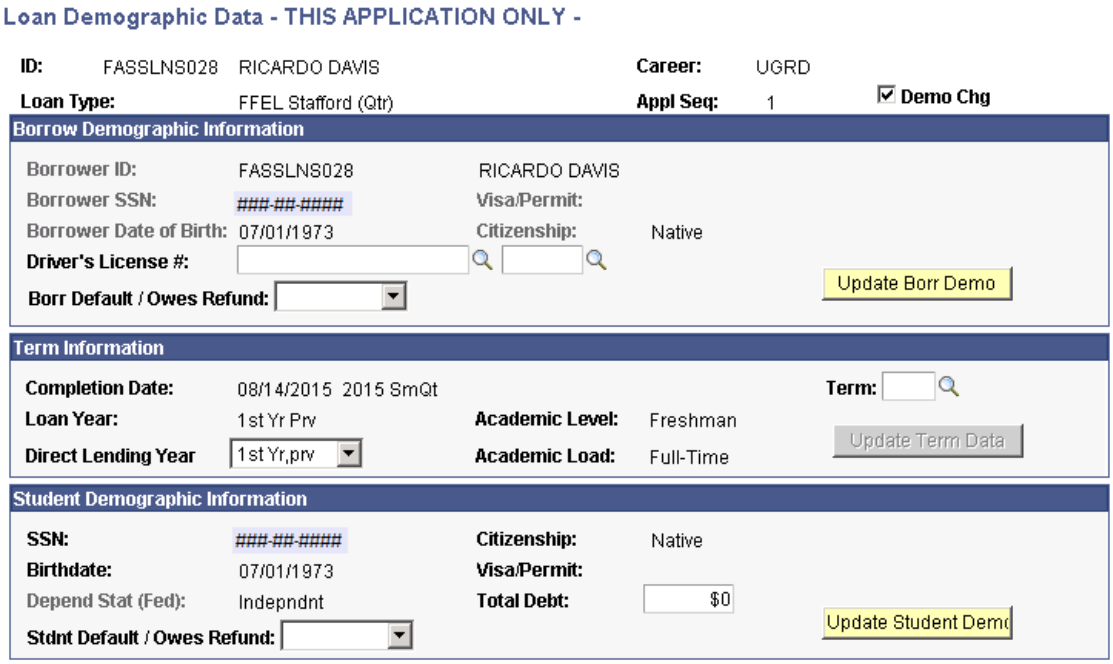
To update the student's loan origination record to reflect the certain changes, first make the changes in the FA Term record. Before you can update the Academic Level, NSLDS Loan Year or Anticipated Completion Date fields on the loan origination record, you must first update in FA Term, then bring those changes into the student's loan origination record.

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> **Note**
>
> Changes to FA term information can require additional processing steps, such as running FA term build and student budget assignment processes.

After updating the appropriate FA Term record, access the Loan Demographic Data page.

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



When you finish making changes to this page, save the Loan Origination 1 page.

Field or Control	Description
Demo Chg	Select this check box to make the fields and buttons available for processing loan demographic changes.

Term information

Field or Control	Description
Term	Enter the term you changed in the FA Term record. This field is available when the **Demo Chg** check box is selected.
Update Term Data	Click this button to pull in any changed information from the FA Term record into the loan origination application.

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Generating and Viewing @1-07 Loan Adjustment Information

Access the Loan Period Change page (click the **Detail 1-07** link on the Change Detail 2 page) .to view the Loan Period Change (07) changes that were recognized in loan origination. A **Change Status** value of *Ready* indicates that no other action is necessary to complete the loan period change transaction.

After you have saved your loan changes, run the loan origination process using the adjustments option. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted.

The action code values OC (origination changed) and OX (origination cancelled) indicate adjustments have been made.

Processing Cancellations and Reinstatements

Access the Student Aid Package page (**Financial Aid**, and then **Awards**, and then **Awards Processing**, and then **Assign Awards to a Student**, and then **Student Aid Package)**, manual award entry pages, or an award override page.

Loan cancellations and reinstatements (CommonLine Change @1-08 Detail record) are loan level adjustment changes that the system generates when you cancel or reinstate a loan before releasing the first disbursement. For reinstatements, if the lender has already processed the cancellation, the school can either fully or partially reinstate the loan. The cancellation or reinstatement change is initiated on the student's award package.

Canceling a Loan

To cancel a loan:

1. Click the **Look Up Action** button in the row of the loan that you want to cancel.
2. Select **Cancel.**
3. Press TAB to move out of the **Action** field.
4. Click the **Validate** button.
5. After validation is complete, click the **Post** button.

Reinstating a Loan

To reinstate a loan:

1. Click the **Look Up Action** button and select *Offer* or *Offer/Accept.*
2. Enter the amount of the loan reinstatement.
3. Click *Validate.*
4. After the validation is finished, click *Post.*

   The system saves the information and updates the student award tables. The system processes a partial reinstatement if the amount is less than the original cancelled loan amount.

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> **Note**
>
> For a loan reinstatement, you must use the same loan item type as the cancelled loan. If you add a new row and use a different loan item type, the system originates a new loan.

Generating and Viewing @1-08 Loan Change Information

After the loan changes have been made to the student's award package, run the loan origination process using the adjustments option. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted.

The action code values OC (origination changed) and OX (origination cancelled) indicate adjustments. A successfully reinstated loan has an action code value of OC.

Access the Loan Cancellation/Reinstatement page to view the CommonLine Change @1-08 Detail changes that were recognized in loan origination. The system populates the **Reinstated Loan Amount** field based on the amount of the reinstatement. A **Change Status** value of *Ready* indicates that no other action is necessary to complete the loan period change transaction.

Related Topics

- Using Auto Packaging and Auto Select Packaging
  Use the Student Aid Package page for Auto Packaging and Auto Select Packaging individual students. You select the packaging plan for Auto Packaging and the system selects the packaging plan for Auto Select Packaging:
- Originating CommonLine Loans
  Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**).

Processing Disbursement Level Changes

Disbursement level changes occur when you make adjustments to individual disbursements of a guaranteed loan. Two types of CommonLine 4 change transaction record types communicate disbursement changes:

- CommonLine Change @1-09 Detail records (Disbursement Cancellation/Change)

  The system generates the Disbursement Cancellation/Change @1-09 Detail record when you submit full or partial disbursement cancellations, reinstate previously cancelled disbursements, place disbursements on hold, place disbursements from hold to release status, and reschedule disbursement dates prior to the release of funds for the disbursement.
- CommonLine Change @1-10 Detail records (Disbursement Notification/Change)

  The system generates the Disbursement Notification/Change @1-10 Detail record when you submit full or partial disbursement cancellations, reissue requests, and reinstatements after the release of funds for the disbursement.

The loan origination process automatically determines the type of disbursement level change transaction record based on whether the disbursement was received.

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Disbursement Date Changes

Use the Loan Origination 2 page to adjust disbursement dates.

> **Note**
>
> You can only set disbursement dates equal to or after the current date. You cannot change a disbursement date to a past date.

Disbursement Hold and Release Changes

Use the Loan Origination 2 page to manually set individual loan disbursements to *Hold* or *Release.* You can also use the batch CommonLine Hold/Release process to automatically set the disbursement status for selected groups of disbursement records.

> **Note**
>
> To modify the process for setting hold/release status for your disbursements using Application Engine SQR, COBOL, and so on, set the PS_STDNT_AWARDS.OFFER_ACTIVITY_IND field to *A* for each employee ID that you change the PS_LOAN_DISBMNT.LN_HOLD_REL_STAT value to *H* (hold) or *R* (release). The PS_STDNT_AWARDS.OFFER_ACTIVITY_IND field is set automatically when you set the disbursement hold/release status online. It identifies a loan record as a potential change record.

Cancellations, Reinstatements, and Other Adjustments

You make disbursement date changes directly in the loan origination pages and all other disbursement changes on the awarding pages. Changes made to the student's loan disbursements on the award pages are recognized by the loan origination process and generate appropriate change transaction record types.

Changes to individual disbursements generally require changing split codes or the use of custom splits; this varies according to your institution's policies. Prior changes to a student's awards may require you to use the Award Entry/Manual or Award Override pages.

The following are examples of disbursement level changes:

- Canceling disbursements due to student non-enrollment.
- Reinstating previously canceled disbursements due to student re-enrollment.
- Decreasing a student's loan eligibility due to new funds awarded to the student.
- Increasing a student's loan eligibility due to the loss of expected financial aid awards.

Processing Post Disbursement Changes

When you reinstate a loan disbursement that has already been sent to the school by the disbursing agent, you must modify the original approved disbursement date before you can generate a post disbursement change transaction record.

The loan origination program also evaluates the status of the reinstated disbursement. If the school has already received a student's loan disbursement but has not yet applied the funds to

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the student's account, the system does not reinstate the disbursement until it either applies the funds to the student's account or returns them to the disbursing agent.

If either of the two conditions exists, the following error message 1021 appears in the Loan Origination message log:

The business rules established between your institution and your lending partners dictate the appropriate adjustment. To request a reissue and increase of the disbursement, adjust the disbursement date in the Originate Loan - Loan Origination 3 page before you run the loan origination process. Be sure to return the funds to the lender. Use the CommonLine Disbursement Maintenance page to document the return of funds.

Generating and Viewing @1-09 and @1-10 Loan Adjustment Information

After the loan changes have been made, run the loan origination process using the adjustments option. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted. The action code values of OC (origination changed) and OX (origination cancelled) indicate adjustments.

This is an example of loan change records calculated by the loan adjustment process (this example is specific to CL4).

- Access **Financial Aid**, and then **Loans**, and then **View Disbursement Status**, and then **Origination Loan Disbursement.** If a loan disbursement is adjusted or cancelled, the system displays a disbursement action message in the Description area. If the adjustment results in a CommonLine 4 change transaction record, the **Change** link is active.
- Click the **Change** link to open the Loan Disbursement Change page and view the type of CommonLine 4 change record that the system generates for the loan disbursement.
- Pre-Disbursement Charges:

  The system generates the Pre-Disbursement Change (09) record type if the school has not yet received the disbursement. Access the Cancel/Reinstate Loan page to view the CommonLine Change @ 1–09 Detail changes. The **Change Status** of *Ready* indicates that no other action is necessary to complete the Loan Period Change transaction.

  Click the active **Change** link to identify changes to the loan that require the system to create the Pre Disbursement Change (09) record type.
- Post-Disbursement Charges:

  The system identifies the Post Disbursement Change (10) record type if the school has received the disbursement. Access the Post Disbursement Change page to view the CommonLine Change @ 1–10 Detail changes. The **Change Status** value of *Ready* indicates that no other action is necessary to complete the Loan Period Change transaction.

  Click the active **Change** link to identify changes to the loan that require the system to create the Post Disbursement Change (10) record type

Although the loan adjustment process can calculate the amount of funds that must be returned to the lender, the school is responsible for initiating and completing the return of fund transactions. Running the CommonLine 4 EFT Reconciliation reports and the CRC EFT Discrepancy reports can identify post disbursement changes that require a return of funds. After the funds are returned to the lender or disbursing agent, update the returned amounts in the CommonLine Disbursement Maintenance page.

Related Topics

- Reviewing Loan Origination Information
  This section discusses how to:

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- Understanding the Hold/Release Process
  The Set Hold/Release Flag process uses equations to evaluate a student's eligibility for loan disbursement and then sets the disbursement to be held or released. Disbursements from loan servicers that do not participate in hold and release processing are not evaluated. The equations evaluate changes in the student's load level and verify their satisfactory academic progress status.
- Reviewing CommonLine Loan Status Information
  Access the Loan Status Summary Information page (click the **Loan Status Summary** link on any page in the Originate Loan component).
- Originating CommonLine Loans
  Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**).
- Reviewing Loan Disbursement Actions
  Access the Loan Disbursement Action page (click the **Detail** link on the Origination Loan Disbursement page).
- Reviewing Loan Disbursement Changes
  Access the Loan Disbursement Change page (click the **Disbursement Action Detail** button on the Loan Disbursement page).
- Reviewing Cancelled and Reinstated Loans
  Access the Cancel/Reinstate Loan page (click the **Change** link on the Loan Disbursement Change page).

Processing Loan Increases

Loan increases, CommonLine Change @1-24 Detail records, are another type of loan level adjustment change. If the amount of the increase exceeds the borrower's promissory note requested amount, the system generates a new loan instead of an increase. You can view the promissory note requested amount on the Loan Origination 3 page in the Maintain Originated Loans component.

Increasing a Loan Amount

To increase a loan amount, access the Student Aid Package page (**Financial Aid**, and then **Awards**, and then **Awards Processing**, and then **Assign Awards to a Student**, and then **Student Aid Package**), manual award entry pages, or an award override page.

1. Click the **Look Up Action** button and select *Offer* or *Offer/Accept*
2. Enter the new increased amount of the loan
3. Click the **Validate** button.
4. When the validation is finished, click the **Post** button.

> **Note**
>
> Loan increase transactions are most likely to occur with alternative loans. This is due to the elimination of the loan requested amount from the FFELP promissory notes. For FFELP loans, in most cases, the system originates a new loan for additional increases in loan eligibility rather than a loan increase transaction.

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Generating and Viewing @1-24 Loan Adjustment Information

After making changes to the loan awards, run the loan origination process with adjustments activated to process the changes. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted. The action code values of OC (origination changed) and OX (origination cancelled) indicate adjustments.

This is an example of loan change records calculated by the loan adjustment process.

1. Access the Loan Application Summary page (**Financial Aid**, and then **Loans**, and then **View Loan Application Status**).
2. Click the **Origination Status** link on the Loan Application Summary page to view the adjusted loan (Orig Change).

   The **Change** link is active because this is a loan level change.
3. Click the **Change** link to open the Loan Origination Change page that indicates that the system generated the Loan Increase (24) record and is ready for transmission.
4. Click the **Change** link on the Loan Origination Change page to open the Loan Increase page. The page shows the changed information that you transmitted to the loan servicer.

> **Note**
>
> If a message is associated with the record, the system displays a message link because the loan servicer has not received the change record. The link becomes active if the servicer rejects the change record and provides error messages.

Related Topics

- Awarding Online
  This section discusses how to:
- Originating CommonLine Loans
  Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**).
- Reviewing Loan Origination Information
  This section discusses how to:
- Processing Loan Changes
  The processes discussed in this section are for making changes for both CRC and CL4 unless indicated.

Processing Address, Phone, and Email Address Changes for CRC Loans

You have the option to submit address, phone, and email address changes for CRC change transactions. This option is part of the CRC Outbound process and functions only if you made another change and have calculated a change transaction for the loan. An address, phone, or email address change by itself does not trigger the system to generate a change transaction.

To process an address or phone change:

1. Make an address, phone, or email address change in Campus Community.
2. Make a change to the loan, such as loan period start and end dates.

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3. Run the Process CRC Outbound Records process with the Orig Change Outbound and Demographic Changes options selected.

   The CRC Outbound process determines whether this loan information has changed since the last time that you submitted information to the servicer. If so, the system submits the changed information in the change transaction record.

Related Topics

- Selecting Validated CL 4 Loan Files to Outbound
  Access the Process CL 4 Outbound Files page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CL 4 Outbound Records**, and then **Process CL 4 Outbound Files**).

Creating Change Transaction Files

To generate CRC change transaction files or CommonLine 4 (C004P) change transaction files, use the same outbound processes used to generate application send files, but use different run control options. As with application send records, change records must be originated and validated before you create change transaction files.

This is the change transaction outbound procedure for CommonLine FFELP and alternative loans using either CRC or CL 4:

1. Make changes to the student's loan.
2. Run the Loan Origination process, using Adjustments, to detect changes made to the student's loan and calculate new loan eligibility. The calculated information is stored on the loan origination application tables.
3. Run the Loan Validation process to check the loan changes for data discrepancies. Loans failing validation are reprocessed in subsequent runs until validation is reached.
4. Run the CommonLine Loan Outbound process to process validated loans processed into outbound staging tables. Be sure to select the appropriate Outbound Change run control options.
5. Run the Change File Creation process to create loan application files using the staging table information. CRC generates files in XML format while CL 4 uses ASCII files.

After you submit the change files to the loan servicers, they are processed and you are notified using receipt of response files for each loan change processed.

Related Topics

- Creating CL 4 Loan Files
  After you have originated and validated your FFELP and alternative loans, you create the files to send to the loan destination.

Receiving and Processing Change Application Response Files

After sending the loan change files to your loan servicers, you receive response files from the servicers to acknowledge the receipt of your changes and to report the status of each loan change record sent.

This is the inbound business processing flow for CommonLine FFELP and alternative loans using either CRC or CL 4:

1. School receives inbound loan files from loan servicers.
2. Run an inbound process to read the information from the files into the CommonLine staging tables.

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3. When the information is in the staging tables, run the CommonLine loan inbound process.

   This process takes information from the external loan record and updates the originated loan records in the database.

Related Topics

- Loading CL 4 Inbound Files to Staging Tables
  Access the Run Control Parameters page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Inbound EC Agent**, and then **Run Control Parameters**).

Accepting Change Transactions Manually

To accept change transactions manually if your guarantor does not send a response record to update the system, use the CommonLine Loan Origination Transmission page (Financial Aid, Loans, CommonLine Management, Override Loan Status). It is important to ensure that your change transactions are resolved in the system to allow subsequent change transactions to take place automatically if the student's eligibility changes further.

Related Topics

- Managing Loan Origination Transmission Data
  This section discusses how to:

Managing Disbursement Hold and Release Processing

The system automatically selects and reviews pending CommonLine loan disbursements. If your institution participates in disbursement hold and release processing, you can use the Hold/Release process (FAPLCLHR) to determine whether disbursements should be released to your institution or held until your institution requests the funds.

This section provides an overview of the Hold/Release process, lists prerequisites, and discusses how to run the Set Hold/Release process.

> **Note**
>
> Disbursement hold and release processing is an optional business process supported by CommonLine. You must establish agreements with your loan servicers to participate.

Understanding the Hold/Release Process

The Set Hold/Release Flag process uses equations to evaluate a student's eligibility for loan disbursement and then sets the disbursement to be held or released. Disbursements from loan servicers that do not participate in hold and release processing are not evaluated. The equations evaluate changes in the student's load level and verify their satisfactory academic progress status.

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> **Note**
>
> You can modify the delivered equations as necessary or create your own custom equations.

Records are selected for processing by using the run control settings. Using the delivered equations, each disbursement record is evaluated to meet the following criteria:

- The student's current calculated financial aid load is equal to the financial aid load set at the census date for the term the disbursement is intended.
- The student has a satisfactory academic progress status of *Meets SAP* or *Probation.*

If both conditions are true, the student is considered eligible for disbursement for the term and the disbursement hold/release status is set to *R* (release disbursement) if it was previously set to *H* (hold disbursement) on the Loan Orig CommonLine page.

If any condition is false, the student is considered ineligible and status for the disbursements is set to *H.*

After the system sets the disbursement hold/release status on loan disbursement records, the next time that you run the loan origination process with the adjustments option activated, CommonLine 4 @1-09 Change Transaction records are generated for each disbursement.

Related Topics

- Campus Solutions Application Fundamentals: Understanding Equations

Prerequisites

To use the CommonLine Hold/Release process, you must:

- Establish hold and release processing agreements with your loan servicers.
- Assign a default status of either Hold or Release for each eligible CommonLine 4 loan destination and No Support for nonparticipating loan destinations. The Set Hold/Release Flag process evaluates loan disbursements only when the **Disbursement Hold/Release** status is set to *Hold* or *Release.*
- If necessary, modify the hold and release equation delivered with the system to add additional eligibility criteria.

Related Topics

- Defining CommonLine Options
  Access the CommonLine Options page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **CommonLine 4**, and then **Create Loan Destinations**, and then **CommonLine Options**).
- Selecting Equations for Hold and Release
  Access the Hold/Release Equations page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Loans**, and then **Hold and Release Equations**, and then **Hold/Release Equations**).
- Campus Solutions Application Fundamentals: Understanding Equation Engine

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Pages Used to Manage the Hold/Release Process

Page Name	Definition Name	Navigation	Usage
Hold/Release	RUNCTL_CLHR	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Process Hold Release**, and then **Hold/Release**	Run the set hold/release process. Establish run control settings and execute the FAPLCLHR COBOL process.
Hold/Release Error Messages	LN_HR_MSG_LOG	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Review Hold/Release Errors**, and then **Hold/Release Error Messages**	View error messages for each loan disbursement for a selected student. Only messages generated from the most recent execution of the Hold/Release process (FAPLCLHR) can be viewed.

Running the Set Hold/Release Process

Access the Hold/Release page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Process Hold Release**, and then **Hold/Release**).

Field or Control	Description
Process Name	Select the Process Name equation set that you defined on the Hold/Release Equations setup page.
Hold/Release Option	Select a hold or release option. *Both Hold/Release:* Evaluate disbursements currently set to Release and reset to Hold, if ineligible, and evaluate disbursements currently set to Hold and reset to Release, if eligible. *Release:* Select to evaluate disbursements currently set to Release and reset to Hold, if ineligible.
From Date and **Thru Date**	Enter the earliest and latest dates for disbursement that you want to process.
Student Override	Select to activate the **ID** field. You can then select individual IDs for processing.
ID	When you run the process, the system evaluates only the loan disbursements for the entered IDs that fall within the **From Date** and **Thru Date** fields.

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Resolving Change Transaction Errors

When a change transaction record is rejected, the rejected record is sent to the school in the application response file as a Change Transaction Error @6 record. Up to five error messages can be provided on this record.

This section discusses how to:

- Identify change error records.
- Review error messages.
- Resolve error messages. and run loan adjustments.

Pages Used to Change Transaction Errors

Page Name	Definition Name	Navigation	Usage
CL Loans on Hold (FA901) Report	FA901	**Financial Aid**, and then **Loans**, and then **CommonLine Reconciliation**, and then **Loans on Hold Report**	Identify adjusted loans on hold.
Loan Origination Auth Sumry (FA850) Report	FA850		Identify loan cancellation charges that were rejected.
Loan Application Summary	LOAN_ORIG_SUMM_DTL	**Financial Aid**, and then **Loans**, and then **View Loan Application Status**	View loan summary information. Links are made available to more detailed loan information.
Loan Origination Information	LOAN_ORIG_SEC	**Click the Origination Status link on the Loan Application Summary page.**	Determine whether the system has created a change transaction for the loan. View the CRC status codes and the corresponding CRC staging table information for the selected loan action row.
Origination Loan Disbursement	LOAN_DISBURSEMENT	**Click the Disbursement Status link on the Loan Application Summary page.**	Determine whether the system has created a disbursement level change transaction for the loan.
Loan Origination Change	LN_CL_ORIG_CHG_SEC	**Click something on the Loan Origination Information page.**	Locate rejected loans identified on the Loan Origination Information page.
Loan Disbursement Change	LN_CL_DISB_CHG_SEC	**Click something on the Loan Origination Information page.**	Locate rejected loans identified on the Loan Origination Information page.

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Page Name	Definition Name	Navigation	Usage
CommonLine Loan Origination Transmission	LOAN_ORIG_TRANS	**Click something on the Loan Origination Information page.**	Remove the hold status on rejected loans that have been corrected.

Identifying Change Error Records

To identify change error records:

1. Run the CL Loans on Hold (FA901) report to identify adjusted loans on hold.
2. Run the Loan Origination Auth Sumry (FA850) report to identify loan cancellation changes that were rejected.

   Use *OX* for the loan action code and a loan action status of *R*.

Reviewing Error Messages

Use the Loan Origination Information page to identify loans with a loan action status of Rejected. Determine the change record types that were generated and navigate to the appropriate Loan Origination Change or Loan Disbursement Change pages to find the rejected record.

The rejected record has a change status of *Error.* The **Message** link should also be active. Click the **Message** link to view the error messages.

Related Topics

- Viewing Loan Origination Information
  Access the Loan Origination Information page (click the **Origination Status** link on the Loan Application Summary page).
- Viewing Loan Origination Change
  Access the Loan Origination Change page (click the **Change** link on the Loan Origination Information page.

Resolving Error Messages and Running Loan Adjustments

Make the necessary changes to correct the rejection. Required actions vary based on the error messages displayed. After you have taken corrective action, use the CommonLine Loan Orig Trans page to remove the hold.

After the hold has been removed—resetting the **Loan Processing Stat** field to *In Service*—run the loan origination process again. The process generates a new change transaction record for the loan. New change transactions for the rejected change transaction record, plus any additional changes made to the loan, are created. Then follow the normal procedures to complete the processing of the change: validate the loan, create outbound files, and send them.

Related Topics

- Managing Loan Origination Transmission Data
  This section discusses how to:

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Processing School Certification Request Applications

This section provides an overview of school certification requests and discusses how to:

- Process school certification requests for CRC.
- Process school certification requests for CL 4.

Understanding School Certification Requests

The certification request process is an optional CommonLine process for some alternative loans. The process differs from FFELP loan application processing in that the borrower applies for the loan directly with the lender instead of through the school's financial aid office. The lender or servicer then asks the school to certify the borrower's eligibility by initiating a CommonLine application response record to the school. The school might not have a record of the student in the financial aid system, either because the student did not apply for aid or the student does not exist in the school's database.

How school certification requests are handled depends on which CommonLine loan version initiates the process. The older CommonLine 4 process is handled manually, while the newer CRC process automates many of the steps.

Pages Used to Process Certification Requests

Page Name	Definition Name	Navigation	Usage
Inbound CRC XML Files	SFA_RUNCTL_CRC_IN	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CRC Inbound files**, and then **Inbound CRC Files**	Load school certification request XML files. Move files into the database
CRC Document Management	SFA_CRC_FILE_REV	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **CRC Document Management**, and then **CRC Document Management**	Review generated XML files, outbound to stage files, XML loaded to stage files, or XML processed files.
CRC Award Management	SFA_CRC_LOAD	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **CRC Award Management**	View process status and loan information.
View CRC Staging Table Records	SFA_CRC_DOCUMENT	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CRC Staging Table Records**	View information on school certification request XML files that have been loaded.

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Page Name	Definition Name	Navigation	Usage
Process CRC Inbound Files	SFA_RUNCTL_CRC_IN2	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CRC Inbound Files**	Process and load individual CRC certification request records into the CRC Certification Requests page.
CRC Certification Requests	SFA_CRC_CERT_RQ	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **CRC Certification Requests**	Review and update loan certification request records to originate.
Student Block Information	SFA_CRC_CERT_STDNT	Click the **Student** link on the CRC Certification Requests page.	View student's social security number, name, and birthdate to assist in identifying the EmplID.
Person Block Information	SFA_CRC_CERT_PERSN	Click the **Person** link on the CRC Certification Requests page.	View non-student borrower's social security number, name, and birthdate to assist in identifying the borrower ID.
Search Criteria	HCR_SM_SEARCH	Click the **Search Match** link on the CRC Certification Requests page.	Enter search criteria to determine whether the student is defined in the database.
Relationships	RELATIONSHIPS	Click the **Related IDs** link on the CRC Certification Requests page.	View relationship data.
Award Summary	STDNT_AWRD_INQUIRY	Click the Award Summary link on the CRC Certification Requests page.	Review annual award summary. View a student's awards and the offered, accepted, authorized for disbursement, and disbursed amounts for each award.
(Inbound EC Agent) Run Control	EC_RUN_INBOUND_01	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Inbound EC Agent**	Load the school certification request records.
CommonLine Inbound	RUNCTL_CLIN	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Process CL4 Inbound Files**	Identify the certification request records.

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Page Name	Definition Name	Navigation	Usage
Financial Aid Report (CL 4 App Response Load Errors Report)	RUN_CNTL_CL_RPT	**Financial Aid**, and then **File Management**, and then **CL4 Load Error Report**	List records with a load status of Error.
Financial Aid Report (CL 4 School Cert Requests Report)	RUN_CNTL_CL_RPT	**Financial Aid**, and then **Loans**, and then **CommonLine Reconciliation**, and then **CL4 Certification Request Rpt**	List the application information provided by the loan servicer.
CommonLine PNote - Stafford	SFA_CRC_PNOTE_STAF	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter Stafford Prom Notes**	Enter the certification request report information.
Promissory Note Plus	SFA_CRC_PNOTE_PLUS	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter PLUS Prom Notes**	Enter promissory note data for PLUS loans. The system uses this data for origination.
Promissory Note Alt	SFA_CRC_PNOTE_ALT	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Enter ALT Loan Prom Notes**	Enter the certification request report information.
CommonLine 4 Import	CL_IMP_MAIN4	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **View CL 4 Response Records**, and then **Application Detail**	Set the load status of each processed certification request record to Processed. Use Skipped if the student is not eligible.

Processing Certification Requests for CRC

To process school certification request applications for CRC loans:

1. To load the school certification request XML files, run the Inbound CRC XML Files process. Use the CRC Document Management, CRC Award Management, and View CRC Staging Table Records pages to monitor this information .
2. To process the individual records, run the Process Inbound CRC Files process, which loads the certification request records into the CRC Certification Requests page. If the lender or guarantor listed on the record is not a valid certification request participant with the school, the record does not load and receives an error status.

   During the load, the system uses the Search Match process to assign the student (and borrower) EmplID to the record, although the record loads if the system cannot identify the EmplID. For PLUS loans, you can create the parent EmplID and load parent information into the Campus Community core tables.

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3. To view the records that were successfully loaded, use the CRC Certification Requests page, which has various criteria fields on the search page to view only the records of interest. After you verify that the Aid Year, Loan Type, EmplID, and Borrower ID (for PLUS) fields are completed, select the **Ready to Use** check box. This allows the loan origination process to originate the loan using the certification request information.

   Use the CRC Document Management, CRC Award Management, and View CRC Staging Table Records pages to review the records loaded in *Error.*

4. Award the student the necessary loan eligibility. The student must be awarded in the same aid year with the appropriate item type(s) based on the aid year and loan type that has been assigned to the certification request record.

   See Awarding Online.

5. Originate the loan. The information entered on the CRC Certification Requests page is used during loan origination. After origination completes, access the Maintain Originated Loans pages (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans) to ensure the correct loan destination and process level are being used. The correct process level depends on what the loan servicer expects from the school.

   See Originating CommonLine Loans.

6. Run loan validation to check the loan origination application for discrepancies

   See Validating CommonLine Loans.

7. 11. Run the CommonLine Outbound processes to create the CRC application send file(s). Send the file(s) to your loan servicers for processing.

   See Processing CRC Loan Files.

Access the CRC Certification Requests page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **CRC Certification Requests**).

Field or Control	Description
Lender OPEID (lender office of postsecondary education identifier)	Indicates the numeric identifier assigned by the Department of Education.
Guarantor OPEID (guarantor office of postsecondary education identifier)	Indicates the numeric identifier assigned by the Department of Education.
Student	Click to access the Student Block Information page to view the student's social security number, name, and birthdate. Use to assist in identifying the EmplID.
Person	Click to access the Person Block Information page to view the non-student borrower's social security number, name, and birthdate. Use to assist in identifying the borrower ID.
Search Match	Click to access the Search Criteria page to enter search criteria to determine whether the student or borrower is defined in the database.
Related IDs	Click to access the Relationships page to review relationship data of the student and parent. Create the relationship if required for PLUS loan processing.

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Field or Control	Description
Award Summary	Click to access the Award Summary page to review annual award summary and to view a student's awards and the offered, accepted, authorized for disbursement, and disbursed amounts for each award. Use to verify the student's eligibility for the loan.

Related Topics

- Reviewing an Annual Award Summary
  Access the Award Summary page (**Financial Aid**, and then **Awards**, and then **View Term Award Summary**, and then **Award Summary**).

Processing School Certification Requests for CL4

To process school certification request applications for CommonLine 4 loans:

1. Load the school certification request records using the Inbound EC Agent process.
2. To process the individual records, run the CommonLine Inbound process.

   When this process is run, any certification request records are automatically set to *Error.*
3. Run the CL 4 App Response Load Errors report to list records with a load status of *Error.*
4. Run the CL 4 School Cert Requests report for information necessary to process the loan.

   The CL 4 School Cert Requests report selects only certification request records that have a load status of *Error.* The report lists the application information provided by the loan servicer.
5. Review the information from each report and process each certification request.
   a. Determine whether your school participates in the loan program identified on the report.
   b. If your school participates, verify that the appropriate financial aid item types, loan types, and loan destinations have been set up to process the loan.
6. Enter the certification request report information in the appropriate CommonLine Prom Note page for Stafford, PLUS, or Alt.
7. Award the student the necessary loan eligibility.

   See Awarding Online.
8. Originate the loan. The information entered on the Prom Note pages is used during loan origination. After origination completes, access the Maintain Originated Loans pages (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain Originated Loans**) to ensure the correct loan destination and process level are being used. The correct process level depends on what the loan servicer expects from the school.

   See Originating CommonLine Loans.
9. If the loan servicer has generated the unique loan ID, update the loan origination record by overriding the unique ID generated by the origination process with the loan servicer's ID.

   See Reviewing Loan Origination Information.
10. Run Loan Validation to check the loan origination application for discrepancies

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See Validating CommonLine Loans.

11. Run the CommonLine Outbound processes to create the CommonLine 4 application send file(s). Send the file(s) to your loan servicers for processing.

    See Creating CL 4 Loan Files.

12. In the CommonLine 4 Import page, set the load status of each processed certification request record to *Processed.* Use *Skipped* if the student is not eligible. A status of *Processed* or *Skipped* ensures that the student is not listed on future reports because the delivered reports key from a status of *Error.*

Adjusting Loan Disbursements Manually

This section discusses how to modify disbursements.

Pages Used to Adjust Loan Disbursements Manually

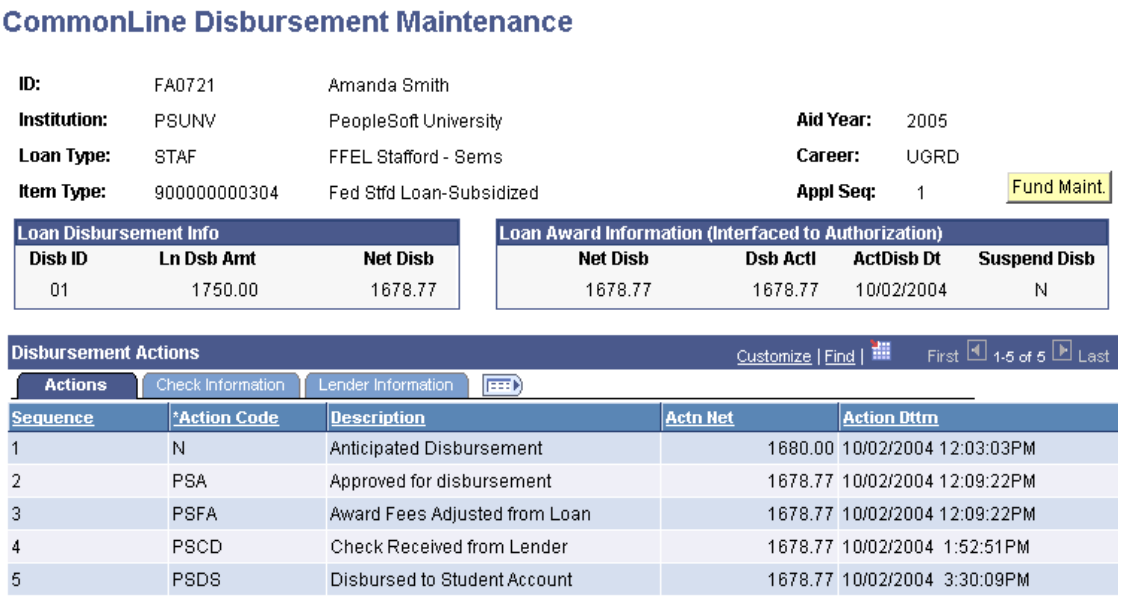
Page Name	Definition Name	Navigation	Usage
CommonLine Disbursement Maintenance	LOAN_FUND_MAINT	**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain CL Disbursements**, and then **CommonLine Disbursement Maintenance**	Adjust disbursements for all CommonLine loans and document the disbursement and return of funds. Suspend or release disbursements.
Comments	LN_DISBACT_COM_SEC	Click the **Comments** link on the CommonLine Disbursement Maintenance page.	Open a free-form comment page that is associated exclusively with the loan action code entered in the page.

Modifying Disbursements

Access the CommonLine Disbursement Maintenance page (**Financial Aid**, and then **Loans**, and then **CommonLine Management**, and then **Maintain CL Disbursements**, and then **CommonLine Disbursement Maintenance**).

This example illustrates the fields and controls on the CommonLine Disbursement Maintenance page: Actions tab. You can find definitions for the fields and controls later on this page.

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Loan Award Information (Interfaced to Authorization)

Field or Control	Description
Net Disb (net disbursement)	The total EFT or manual check balance for the disbursement ID. This is the maximum amount authorized. This can only be updated by the EFT load and this page.
Dsb Actl (disbursement actual)	Total amount disbursed to the student's account.
ActDisb Dt (account disbursement date)	The last date the student's account was updated for this loan disbursement.
Suspend Disb (suspend disbursement)	A value of *Y* indicates that the system is suspending disbursement processing for this loan disbursement. Authorization continues to function. *N* indicates the disbursement is not suspended. This is set in the loan adjustment program when loans are reduced and an EFT has been received. To set this value, enter the appropriate code in the **Action Code** field to make the field available.

Actions Tab

Field or Control	Description
Sequence	The origination action sequence is generated from the loan record activity.

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Field or Control	Description
Action Cd (action code)	Enter an action code for the task you want to perform (entering a check, for example). When you enter the code, appropriate fields become available. *PSAD:* Manual Fund Adjustment. Used to change disbursement amounts. The net disbursement is adjusted with the value of action net. *PSCD:* Check Received from Lender. Used for manual check entry. Updates Student Financials. Assumes the check has been endorsed by the borrower. The net disbursement is adjusted with the value of action net. *PSCR:* Funds Returned to Lender. Used when funds have been returned to the disbursing agent or lender. The net disbursement is adjusted with the value of action net. *PSCN:* Unendorsed Check Received. Used for manual check entry. Updates Student Financials. The check does not disburse to the student's account. The net disbursement is adjusted with the value of action net. The Suspend Disb (suspend disbursement) field is set to *Y.* *PSCE:* Check Endorsed. Used to indicate a previously received check has been endorsed by the borrower. The Suspend Disb (suspend disbursement) field is set to *N.* A previously unendorsed check can now be disbursed to the student's account. *PSFH:* Suspend Disbursement Processing. The Suspend Disb (suspend disbursement) field is set to *Y.* This prevents disbursement to the student's account. *PSRH:* Release Suspended Disbursement. The Suspend Disb (suspend disbursement) field is set to *N.* This permits disbursement to the student's account. *PSPR:* Pending Resolution. Informational only. Can be used in conjunction with reports to manage the timely disbursement and return of loan funds. *PSFN:* Funds Need to be Returned. Informational only. Can be used in conjunction with reports to manage the timely disbursement and return of loan funds.

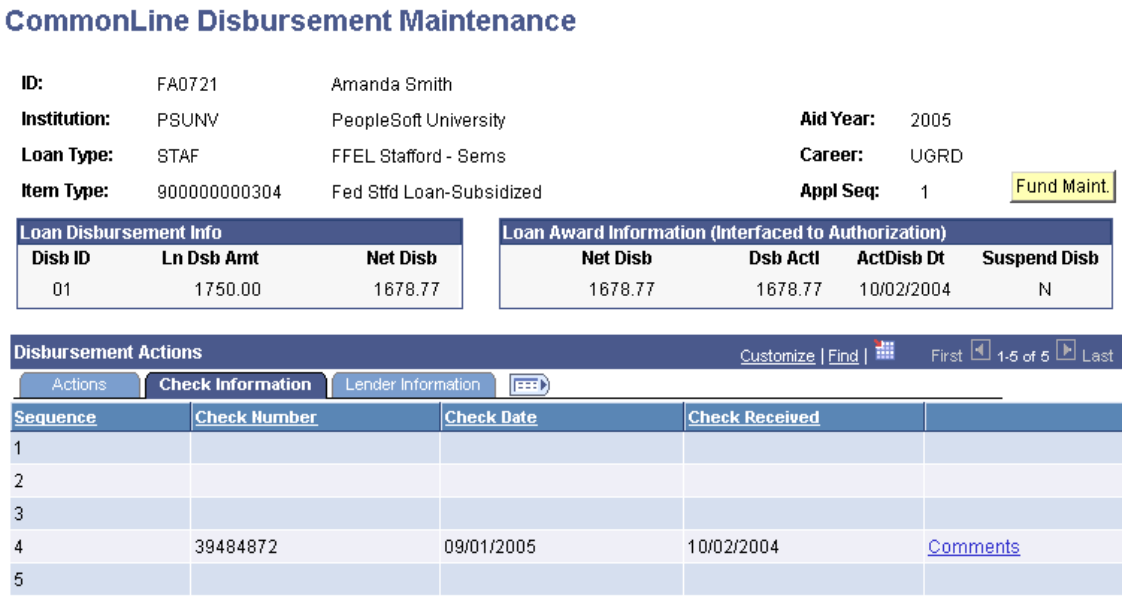
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Field or Control	Description
Actn Net (action net)	Indicates adjustments made to the disbursement. When the loan action code is initiated by the loan origination process or by the loading of an application response file, the value corresponds to the net disbursement. When loan action codes are manually inserted to reflect the receipt or adjustment of actual loan funds—loading of EFT records or manual check entry—the **Actn Net** value is used to adjust the net disbursement on the page.

Check Information Tab

Select the Check Information tab on the CommonLine Disbursement Maintenance page.

This example illustrates the fields and controls on the CommonLine Disbursement Maintenance page: Check Information tab. You can find definitions for the fields and controls later on this page.



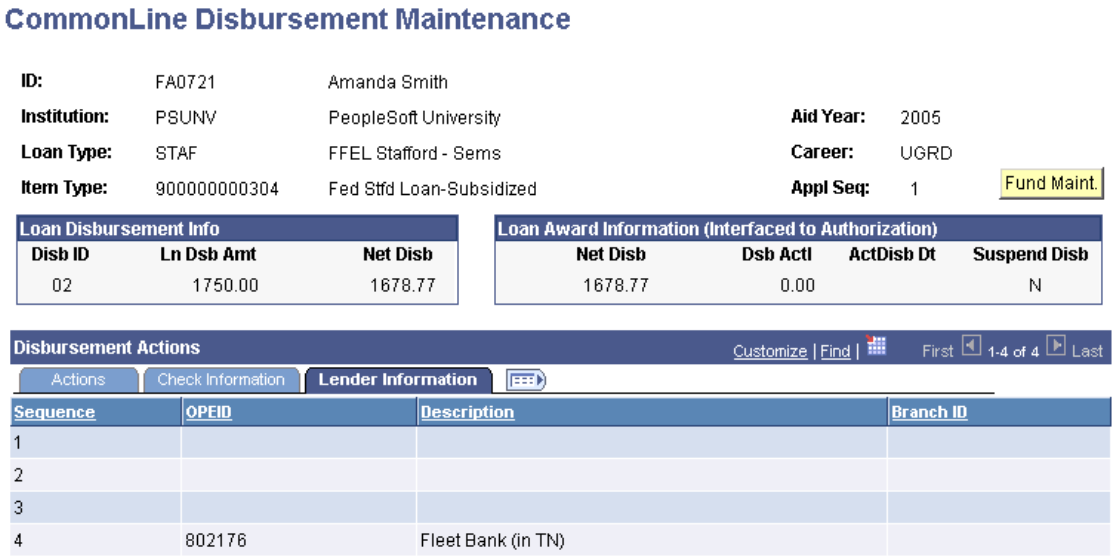
Field or Control	Description
Sequence	The origination action sequence is generated from the loan record activity.
Comments	Click to open a free-form comment page that is associated exclusively with the loan action code entered in the page.
Fund Maint (fund maintenance)	Click to enter transactions. When entering check transactions, the **Check Number, Check Date,** and **Check Received** fields can be updated with the check information.

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Lender Information Tab

Select the Lender Information tab.

This example illustrates the fields and controls on the CommonLine Disbursement Maintenance page: Lender Information tab. You can find definitions for the fields and controls later on this page.



The Lender Information tab reflects whether the loan is a CL4 or a CRC processed loan. **CL4 Lender Information** displays the lender ID in the **Loan Check Lender** column. **CRC Lender Information** displays the lender's OPEID and branch ID values.

Field or Control	Description
Loan Check Lender	For CL4 loans, the **Lender ID** value of the lender is displayed. The **OPEID** and **Branch ID** columns do not display.
OPEID	Displays the ID of the lender who issued the check as entered in the page. When entering check information, the field allows you to select the lender by OPEID.
Description	Displays the name of the lender who issued the check.
Branch ID	Indicates the branch number of the lender OPEID. This field is populated when inserting check information.

Entering Checks Manually

Enter all checks received on this page.

Use the following action codes:

- *PSCD* (Check Received from Lender) if the check is to be disbursed as soon as possible.
- *PSCN* (Unendorsed Check Received) if unendorsed checks need to be entered, but the funds should not be disbursed to the student's account until the endorsement has been

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received. After the endorsement is received, a new row must be inserted with the value of *PSCE* (Check Endorsed) to allow the funds to be disbursed.

Adjusting Amounts After Receipt of Funds

Enter the check for the entire amount for the first loan. Use action code *PSCD.* Next, enter a new action of *PSAD* (Manual Fund Adjustment) enter a negative net amount in the value of the first disbursement for the second loan. Enter a comment explaining that reduction.

Next, select the first disbursement of the second loan. Enter action *PSCD* and enter a net amount for the value of the check reduction. Enter a comment explaining the entry.

Tracking Disbursements Example

Here is an example of using the CommonLine Disbursement Maintenance page to track disbursements.

Loan funds are received using EFT roster. The EFT roster load date is assumed to be the date funds are received by the institution. Authorization and disbursements are run for all students on the roster.

Run the CommonLine reconciliation reports to select all EFT records not disbursed. Review each record not disbursed. Based on the status of each disbursement, you can determine whether:

- The disbursement needs to be returned or reissued. Update the loan and award if necessary. Run the loan adjustments process to calculate a return amount or reissue date. Insert an action code of *PSFN* (Funds Need to be Returned). Use the **Actn Net** field or the comment page to document the amount to be returned. After the funds have been returned, enter a new action code of *PSCR* (Funds Returned to Lender), and enter the amount. This reduces the net disbursement amount to zero. If the disbursement is to be reissued later, the new check is processed normally.
- The disbursement can be made after an issue is resolved. As an example, the student needs to enroll full time. Insert an action code of *PSPR* (Pending Resolution). Enter a comment documenting why the disbursement should be held. Continue to run the EFT Reconciliation reports to monitor the status of the disbursement. If, after ten days, you determine that the check must be returned, enter a new action of PSFN. After the funds have been returned, enter a new action code of *PSCR* and enter the amount.

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37

Processing Direct Loans

Understanding Direct Lending

The William D. Ford Federal Direct Loan program was established to provide long-term academic loans to qualified students who are enrolled in facilities of higher education, vocational, technical, business and trade schools. The Federal Government provides the funds for direct loans directly to the student, bypassing an outside lender. Schools participating in the Direct Loan program communicate direct loan origination and disbursement data using the Common Origination and Disbursement (COD) process.

The Oracle Financial Aid system supports COD processing for the Direct Loan and Pell Grant award programs. Once these award programs are awarded within the system, you run a process that creates distinct COD application records to support the maintenance and processing of COD data.

For each Common Record received and processed by the COD System, the COD System returns a Response document indicating the status of processing, including any rejected data elements and reasons. For Direct Loans, you must create the origination, change, and disbursement record so that the system can properly load and process corresponding inbound acknowledgement records (origination, change and disbursement). There must always be a one to one match between any Direct Loan outbound document and corresponding inbound response document.

> **Note**
>
> The system does not process COD web-initiated response files (document type WB) or the System-Generated PLUS Application Acknowledgment files (document type SP). The COD import process only loads the COD XML data from these document types into the COD staging tables to view and query.
>
> System-Generated Entrance Counseling files (document type EC) are loaded into the COD staging tables. A separate process to evaluate and update the Loan Counseling application table (SFA_LN_CNSL_TBL) with the COD Entrance Counseling data is available.

See Managing Loan Counseling Data.

The three types of direct loans are:

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Direct Loan Type	Loan Characteristics
Direct Subsidized Stafford Loan	A student's eligibility for a Direct Subsidized Stafford loan is determined entirely on the student's ability to demonstrate financial need. The U.S. Department of Education subsidizes the interest; therefore, borrowers are not charged interest while they are enrolled in school at least half time, and during grace and deferment periods.
Direct Unsubsidized Stafford Loan	A student is eligible for a Direct Unsubsidized Stafford loan regardless of their financial situation. Borrowers are responsible for paying the interest on these loans.
Direct PLUS Loan and Graduate PLUS Loan	Parents of dependent students may apply for a Direct PLUS loan to help pay for the student's educational expenses. Graduate and Professional students may apply for PLUS Loans for their own expenses. Dependent and Graduate/Professional students must be enrolled at least halftime. Applicant must not have adverse credit history.

The direct lending portion of the Financial Aid package is designed to help you process the Subsidized Stafford, Unsubsidized Stafford, PLUS, and Grad/PLUS loans awarded to students attending your institution.

Viewing Packaging Results Before Origination

This section discusses how to:

- View Packaging results before origination.
- Update school codes.

Page Used to Update School Codes

Page Name	Definition Name	Navigation	Usage
School Code Update	SFA_RUN_SCHLCD_UPD	**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Update School Code**	Use this page to change school code values on STDNT_AWRD_DISB and STDNT_AGGR_SCHL.

View Packaging Results

You should include a preliminary and periodic review of your packaging results, your loan amount, loan fees, and rebate information for each loan record. This minimizes the potential for incorrect information being originated and submitted to the common origination and disbursement processing center.

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Update School Codes

This section discusses how to update school codes for award disbursements and aggregate areas.

Access the School Code Update page (**Financial Aid**, and then **Awards**, and then **Award Processing**, and then **Update School Code**).

Use this page to update school code values on STDNT_AWRD_DISB and, for awards with an associated aggregate area defined on the financial aid item type setup, to also update the school code values on STDNT_AGGR_SCHL.

Field or Control	Description
Career	Enter the academic career to process. Awards are keyed by academic career.
From School Cd	Enter the school code that you want to be updated from for this selection and parameters. Valid values are retrieved from the Careers for School Code setup.
To School Cd	Enter the school code that you want award records to be updated to for this selection and parameters.

Re-awarding Direct Loans with New Disbursement Plans

The Packaging process does not allow you to change the disbursement plan for direct lending loans, even if the loan has not been originated. If you award a direct lending loan for two terms and then find that the student should only be awarded for one term, you must change disbursement plans. There are two ways to change disbursement plans for non-originated direct lending loans:

Option 1

1. Cancel the original loan (with the original disbursement plan and split code) on the Student Aid Package page.
2. Insert a row on the Student Aid Package page below the row for the canceled loan in Step 1.
3. Using the same financial aid item type as the original loan, award the loan with the new disbursement plan and split code.

> **Note**
>
> If you use professional judgement to override an award amount, ensure that your loan disbursements (amounts, fees, and rebates) are split correctly among your item types. Refer to the common origination and disbursement technical data for details.

Option 2

1. Using the original loan that you awarded (with the original disbursement plan), create a custom split so the money is allocated only to the new terms.

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2. Originate the loan.
3. Access the Application Financial page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**) and select the **Override Loan Dates** check box. Change the **Loan Period Start, Loan Period End,** and **Antc Date** (anticipated disbursement date) to match the new period for which the loan is awarded.

Originating Direct Loans and Viewing Loan Status Summary Information

This section discusses how to:

- Originate direct loans.
- View loan status summary information.

Pages Used to Originate Direct Loans and Display Loan Status Summary Information

Page Name	Definition Name	Navigation	Usage
Loan Origination	RUNCTL_LNORIG	**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**	Originate any Stafford or PLUS loans that have been awarded and have an award status of *Accepted.* The Stafford or PLUS loans must have the loan program indicated as *Direct.*
Loan Status Summary Information	LN_DLSTATSUM_SEC	Click the **Loan Status Summary** link on any Direct Lending processing page that has the link available.	View current loan summary information and quickly check the status of the loan.

Originating Direct Loans

This section discusses how to originate any Stafford or PLUS loans that have been awarded and have an award status of *Accepted.*

Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**).

Control Information

Use this page to run the Loan Origination process (FAPLBOG1). You can add additional rows to include different institution, aid year, and career combinations for originating loans.

Field or Control	Description
CL Orig Options (CommonLine origination options)	This field is used for CommonLine loans only.

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Field or Control	Description
Adjustments	Select to include origination adjustments when you run the origination process. When this check box is selected, origination adjustments are processed for loans for which the overall award or disbursement amounts have changed and the application has been flagged for Loan Change review based on use of the **Activate Change** button on the Application Acknowledgement page. Students who have origination adjustments are not included in the values for the **ID** field in the Student Override group box unless this check box is selected.

Selection Criteria – Population Selection

> **Note**
>
> Only *one* Selection Criterion can be selected: Population Selection, Student Override, *or* Last Name Range.

Field or Control	Description
Population Selection	Select this check box to enable Population Selection for this process. A Population Selection Context Definition (Context Name = Loan Origination, Process Name = SFA_LOANORIG) is delivered for use with this process.
Selection Tool	Select *External File* or *PS Query*.
Query Name	Appears only when PS Query is selected. Select a population selection query that joins with the bind record SCCPU_STDNT_BND.

For more information regarding the Population Selection process, seeCampus Community Fundamentals: Using the Population Selection Process.

Selection Criteria – Student Override

> **Note**
>
> Only *one* Selection Criterion can be selected: Population Selection, Student Override, *or* Last Name Range.

The **Student Override** group box is used to originate loans for a single student or a group of specific students within the selected **Institution, Aid Year,** and **Career.**

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Field or Control	Description
Student Override	Select this check box to originate specific students. When you select this check box, the **ID** field becomes available.
ID	Enter the unique ID of the student to originate. Only students with loans that have a loan award in the *Accepted* status are available. You can insert rows to originate multiple students.

Selection Criteria – Last Name Range

> **Note**
>
> Only *one* Selection Criterion can be selected: Population Selection, Student Override, *or* Last Name Range.

Use the fields in the **Selection Criteria** group box to originate loans for a group of students selected by last name. Only students with the selected **Institution, Aid Year,** and **Career** are selected. You can enter names in the **Selection Criteria** only if the **Student Override** check box is *not* selected.

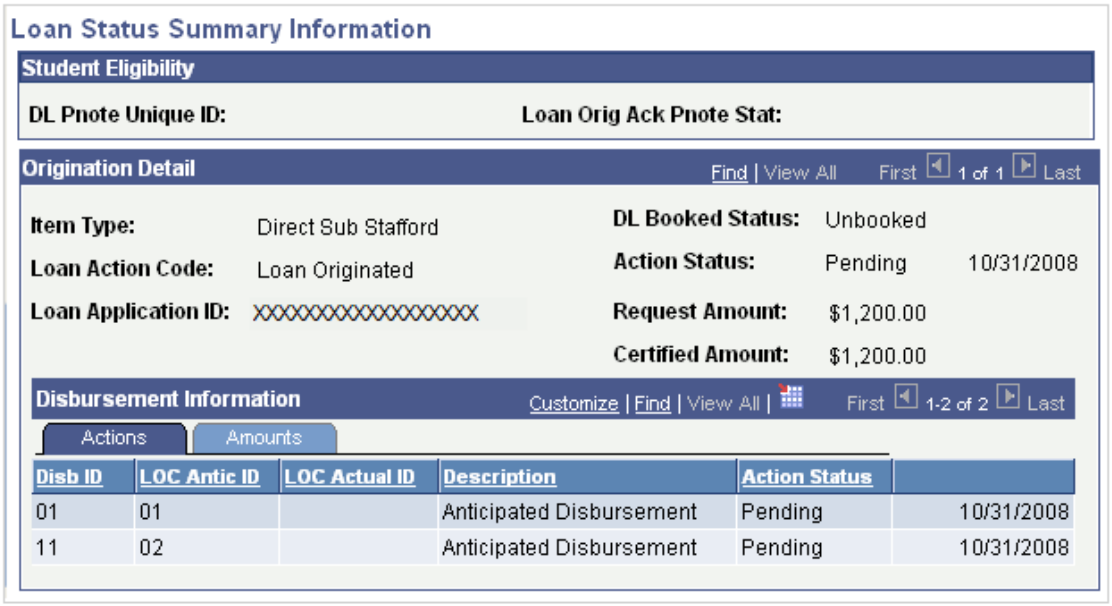
Field or Control	Description
Last Name FROM	Enter the beginning last name of the group of students to originate. Enter the names in alphabetical order. For example, Last Name FROM *Atkins* and Last Name TO *McMurphy*.
Last Name TO	Enter the ending last name of the group of students to originate. Enter the names in alphabetical order.

Viewing Loan Status Summary Information

Access the Loan Status Summary Information page (click the **Loan Status Summary** link on any Direct Loan page with an available link).

This example illustrates the fields and controls on the Loan Status Summary Information page. You can find definitions for the fields and controls later on this page.

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Student Eligibility

Field or Control	Description
DL Pnote Unique ID (direct lending promissory note unique ID)	Displays the promissory note identifier assigned to this loan.

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Field or Control	Description
Loan Orig Ack Pnote Stat (loan origination acknowledgement promissory note status)	Displays the current status of the promissory note. • *(blank)* – Value initially established when Stafford loans (Subsidized and Unsubsidized) origination record is created. System internally recognizes this value as 'no promissory note' available. • *Ack Pending*(acknowledgement pending) – Value represents the MPN Status as reported by COD or may indicate that a promissory note has been created internally by the system. System internally recognizes this value as 'promissory note pending'. • *Accepted* – COD has successfully linked a valid MPN to this loan application ID. Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. • *Closed* – Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. • *Endorser* – Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. This status is used beginning with the 2012–2013 aid year. • *Inactive* – Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. This status is used for the 2011–2012 and prior aid years. • *Print* – Value initially established when Direct PLUS loans (parent or graduate professional) origination record is created. System internally recognizes this value as 'no promissory note' available. • *Rejected* – Status is set when acknowledgment is received from COD and processed by the system. **Note:** *Closed, Endorser,* and *Inactive* MPN values are reported by COD. For disbursement purposes, the system treats *Closed, Endorser,* and *Inactive* MPNs as an *Accepted* MPN. For more information regarding how COD processes MPN's: See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference*

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Origination Detail

Field or Control	Description
Item Type	Displays the financial aid item type associated with this loan.
Loan Action Code	Displays the most recent loan origination action for the loan. For example, *Loan Origination, Loan Origination Change,* and so on.
Loan Application ID	Displays the unique ID that the Origination process generated for this loan. The loan application ID is comprised of the following elements: • Student's social security number. • A single-character code identifying the type of loan (Subsidized, Unsubsidized, PLUS). • A two-character code identifying the aid year. • Direct Loan school code. • A 3-digit sequence number, which is incremented by one each time the student receives an additional loan of the same type.
DL Booked Status (direct lending booked status)	Displays *Booked* if the origination, first disbursement, and promissory notes are accepted and acknowledged by the COD. Until this occurs, the status is *Unbooked.*
Action Status	Displays the current status of the action. The values are: *Accepted, Ac-NtApld* (accepted-not applied), *Authorized, Failed, Invalid, Pending, Received, Rejected,* and *Transmitted.* The **Action Status** for an Acknowledgement is always *Received.* If an origination or origination change is rejected, the system creates a new loan originated row to track the re-submission of the failed/rejected action.
Request Amount	Displays the amount derived from the accepted amount on the award and is equal to the scheduled disbursement amount.
Certified Amount	Displays the amount approved for the loan. This value is derived from the offer amount on the award.

Actions Tab

Field or Control	Description
Disb ID (disbursement ID)	Displays the Disbursement ID defined within the Disbursement Plan and Split Code assigned to the Direct Loan Award from Packaging.

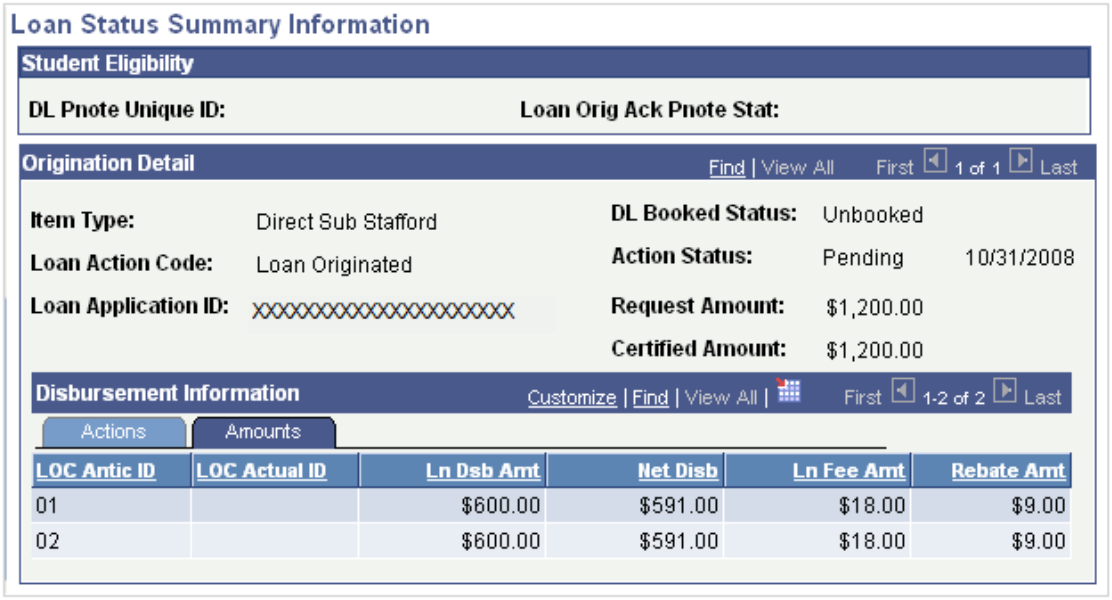
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Field or Control	Description
LOC Antic ID (loan origination center replaced by common origination and disbursement anticipated [disbursement] ID)	Displays the sequentially ordered ID for the anticipated disbursement. The system converts the Disbursement ID that comes from the award and the anticipated disbursement date defined in the Disbursement ID setup to assist in defining the disbursement sequencing requirements. The **LOC Antic ID** represents the Disbursement Number for anticipated disbursements (Disbursement Release Indicator set to 'false). The **LOC Antic ID** may change if additional disbursements are added. However, once an associated **LOC Actual ID** has been assigned, the **LOC Antic ID** does not change.
LOC Actual ID	Displays the numerically ordered disbursement ID, without skipping numbers. The LOC Actual ID represents the Disbursement Number for actual disbursements (Disbursement Release Indicator set to 'true').
Action Code	Describes the type of disbursement action for that row.
Action Status	Displays the status for this disbursement ID. See the description of the **Action Status** field above for more details.
(unlabeled)	Indicates the date of the disbursement action.

Amounts Tab

Select the Amounts tab.

This example illustrates the fields and controls on the Loan Status Summary Information page: Amounts tab. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Ln Dsb Amt (loan disbursement amount)	Displays the gross scheduled disbursement amount. This value is derived from the accepted balance on the loan award.
Net Disb (net disbursement)	Displays the amount derived from the loan amount minus the loan fee amount plus the rebate amount.
Ln Fee Amt (loan fee amount)	Displays the calculated loan fee for this disbursement.
Rebate Amt (rebate amount)	Displays the calculated rebate amount for this disbursement.

Processing and Reviewing Direct Lending Origination Information

Access to the Direct Loan Application component should be restricted to key personnel who are actively involved with the Direct Lending process. The information in this component is eventually transmitted to the common origination and disbursement processing center (COD) in the origination outbound file.

This section discusses how to:

- Process and review borrower bio/demo data.
- Process and review miscellaneous borrower data.
- Process and review financial data.
- Process and review loan application acknowledgement data.

Pages Used to View Loan Change Transmission Information

Page Name	Definition Name	Navigation	Usage
Application Bio/Demo	LOAN_ORIG_DMO_DL01	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Bio/Demo**	Review and correct borrower information, student information, and parent information for PLUS loans. This information comes from Campus Community as well from ISIR load information that the system populates on the Institutional Application pages.
Application Misc Data (application miscellaneous data)	LOAN_ORIG_ELG_DL01	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Misc Data**	Process and review information about student eligibility, promissory note printing, and loan credit.

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Page Name	Definition Name	Navigation	Usage
Application Financial	LOAN_ORIG_FIN_DL01	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Financial**	Review financial data and adjust the loan start, end, and certification dates. Use an override check box to change any of these dates.
Application Acknowledgement	LOAN_ORIG_STAT_DL0	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Acknowledgement**	Review loan process status, loan origination outbound, acknowledgement information, an data elements that go to the Origination files. Set and remove loans from Hold status. When the inbound files return from COD, the system acknowledges the data and populates the fields on this page.
Miscellaneous Loan Detail	LN_ORIG_TRNS_MISC	Click the **Misc Loan Detail** link on the Application Acknowledgement page.	View additional direct lending origination and acknowledgement information regarding the disclosure print option for the loan. The information displayed in this page represents an example of detail on an outbound file.
Loan Eligibility Detail	LN_ORIG_TRNS_ELIG	Click the **Eligibility Detail** link on the Application Acknowledgement page.	View origination and acknowledged direct lending eligibility detail information. The information displayed in this page represents an example of detail on an outbound file.
Borrower Detail	LN_ORIG_TRNS_BORR	Click the **Borrower Detail** link on the Application Acknowledgement page.	View origination and acknowledged detail information for the borrower. The information displayed in this page represents an example of detail on an outbound file.

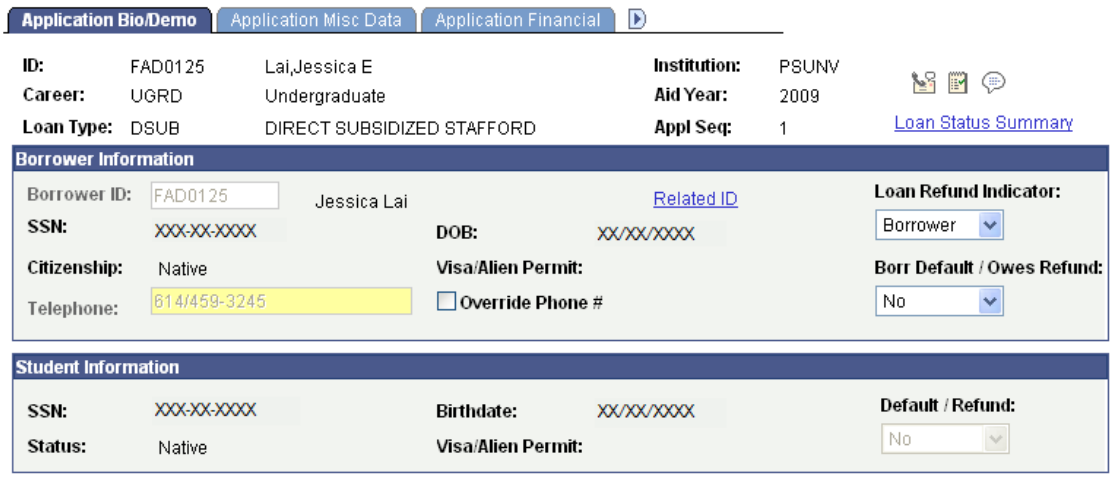
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Page Name	Definition Name	Navigation	Usage
Student Detail	LN_ORIG_TRNS_STU	Click the **Student Detail** link on the Application Acknowledgement page.	View origination and acknowledged detail information for the student. The information displayed in this page represents an example of detail on an outbound file.
Name Detail	LN_ORIG_TRNS_NAME	Click the **Name Detail** link on the Application Acknowledgement page.	View the origination and acknowledged name information for this loan. The information displayed in this page represents an example of detail on an outbound file.
Address Detail	LN_ORIG_TRNS_ADDR	Click the **Address Detail** link on the Application Acknowledgement page.	View origination and acknowledged address information for the borrower. The information displayed in this page represents an example of detail on an outbound file.

Processing and Reviewing Borrower Bio/Demo Data

Access the Application Bio/Demo page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Bio/Demo**).

This example illustrates the fields and controls on the Application Bio/Demo page. You can find definitions for the fields and controls later on this page.



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The **Appl Seq** (application sequence) number increases each time a new loan origination record is created for the ID, Career, Loan Type, Institution, and Aid Year combination.

Borrower Information

The fields in the Borrower Information group box contain information regarding the borrower of the loan. The borrower information for Stafford loans and PLUS loans for Graduate and Professional students automatically display the student's information. Information is display only.

When a PLUS for parent loan application is created, the Borrower Information is empty. Valid Borrower Information must be entered before the loan application can be communicated to COD.

Field or Control	Description
Borrower ID	For Stafford loans and PLUS loans for Graduate and Professional students, the Borrower ID is automatically populated with the student's ID. For PLUS loans for parents, if blank, select the 'Look Up' icon to view valid Borrower IDs already established as a valid Relationship to the student's ID. Only Relationship IDs defined with the Guardian attribute of Parent or Guardian appear in the Look Up results.
Related ID	Link to open the Campus Community Relationship component. Use this link to directly create a valid relationship ID, that can then be available to be entered in the Borrower ID field. When creating a relationship, the Guardian attribute must either defined as 'Parent' or 'Guardian'.
SSN (social security number)	Displays the social security number for the borrower.
DOB (date of birth)	Displays the date of birth for the borrower.
Loan Refund Indicator	Select a value if loan refunds go to the *Borrower* – the parent or guardian in the case of PLUS loan or to the *Student.*

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Field or Control	Description
Citizenship	Displays the **Citizenship** value applied to the loan application. Valid values are: *1 – Native, 2 – Naturalized,* and *3 – Alien Permanent.* For DL Stafford loans, the field is initially 'blank'. If the borrower's **Citizenship** is updated via the Override Loan Application Data component, the field displays any overridden **Citizenship** value. The field can also be updated for the loan application using the Population Update process. For DL PLUS for Graduate and Professional loans, the field displays the student's **Citizenship** defined in Campus Community. If the borrower's **Citizenship** is updated via the Override Loan Application Data component, the field displays any overridden **Citizenship** value. The field can also be updated for the loan application using the Population Update process. For DL PLUS for parent loan applications, the field displays the borrower's **Citizenship** defined in Campus Community. If the borrower's **Citizenship** is updated via the Override Loan Application Data component, the field displays any overridden **Citizenship** value. See Overriding Direct Loan Application Information. See Campus Community Fundamentals: Using the Population Selection Process.
Visa/Alien Permit	Displays whether a borrower who is not a U.S. citizen holds a valid Visa or Alien Permit. Field can be updated via the Override Loan Application Data component. See Overriding Direct Loan Application Information.
Override Phone # (override phone number)	Select this check box to activate the **Telephone** field and override the current information. If you select this check box and override the phone number, the new value remains regardless of changes made to Campus Community records. If you clear the check box, the system populates the **Telephone** field with the current Campus Community values and makes the field inaccessible.
Borr Default / Owes Refund (borrower default/owes refund)	Indicates whether a borrower is in default on a student loan or owes a refund to the federal government. Values are: *No*, *Overridden,* or *Yes.* For Stafford loans, this value is derived from the **NSLDS Match** field on the Packaging Status Summary page. **Note:** *Overridden* applies to PLUS origination files only. *Overridden* is not an acceptable value for Direct Stafford loan origination files. The values from the **NSLDS Match** field are translated to this field as shown in the following table.

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Original Match Field Value	Default/Refund Value
2. Default	Yes
3. Overpayment	
4. Default and Overpayment	
5. Eligible Partial Title IV Aid	Overridden
All other values	Not

Student Information

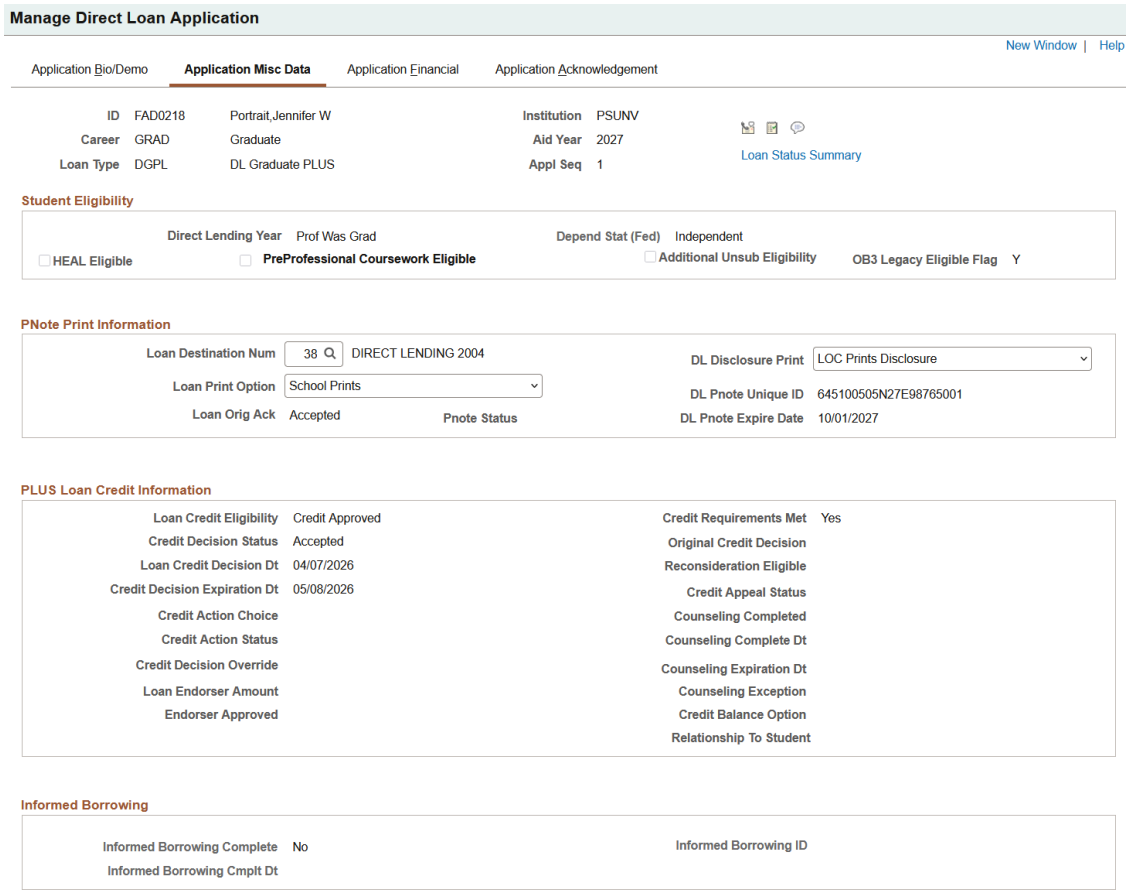
Field or Control	Description
SSN, Birthdate, Status, and **Visa/Alien Permit**	The values that appear are for the student associated with this loan. If the borrower is the student, this information is the same as the information in the **Borrower Information** group box.
Default / Refund	This is the same field as the **Borr Default / Owes Refund** field in the **Borrower Information** group box.

Processing and Reviewing Miscellaneous Borrower Data

Access the Application Misc Data page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Misc Data**).

This example illustrates the fields and controls on the Application Misc Data page. You can find definitions for the fields and controls later on this page.

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Student Eligibility

Field or Control	Description
Direct Lending Year	Contains the direct lending grade level for this student, as defined by the U.S. Department of Education's *COD Technical Reference.* The term in the **Direct Lending Year** field in FA Term on the FA Info page is related to the first distribution used in the award for this student. That term is used to derive this Direct Lending Year value.
Depend Stat (Fed) (dependency status, federal)	Displays the federal dependency status for the student. The status is derived from the FA Term table and is required on all established Direct Loans.
HEAL Eligible (Health Education Assistance Loan eligible)	Indicates whether the student is eligible for a HEAL loan, as determined on the Packaging Status Summary page and is valid only on Unsubsidized loans. HEAL loans are for health profession students who meet the HEAL program requirements. HPPA indicator tag reports a *true* value.

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Field or Control	Description
PreProfessional Coursework Eligible	Indicates whether the student is eligible for additional Unsubsidized Stafford due to participation in eligible undergraduate or graduate preparatory coursework. This value is derived from the Packaging Status Summary page. The student must have a Direct Lending Year of Fifth Year and above. Preprofessional Coursework indicator tag reports a *true* value.
Additional Unsub Eligible (additional unsubsidized eligible)	This field is checked if either of two circumstances arise: • The student is a dependent and the parent or guardian is denied a PLUS loan. This value is derived from a combination of the Plus Override check box (accessed on the Database Matches page via the Packaging Status Summary page) and the Additional Unsubsidized Eligibility option defined on the corresponding Loan Type. The Packaging process determines the eligibility for additional unsubsidized Stafford by evaluating the PLUS Override check box. It is the school's responsibility to ensure the additional unsubsidized award uses a unique Unsubsidized Stafford Financial Aid Item Type that has a corresponding Loan Type with the Additional Unsubsidized Eligibility option set. For NSLDS reporting, this ensures the loan application and specific amount is properly identified as an additional unsubsidized Stafford based on PLUS Denied. • The student is a dependent and the PreProfessional Coursewrk check box on the Packaging Status Summary page is checked. If either circumstance is met, then the Additional Unsubsidized Eligibility indicator tag reports a value of *True*.
OB3 Legacy Eligible Flag (One Big Beautiful Bill Legacy Eligible Flag)	Indicates whether the student qualifies for legacy loan limits. It is populated via COD inbound processing or the Loan Limit Exception report and stored on STDNT_FA_TERM.

PNote Print Information

(promissory note print information)

Field or Control	Description
Loan Destination Nbr (loan destination number)	Represents the EDI destination. Select the number that corresponds to direct loan COD.

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Field or Control	Description
Loan Print Option	Determines where the promissory note is printed. Select one of the following values: *Dest Prints (return to school):* Select this option to specify that the COD (the destination) prints the promissory note and sends it to the school. The school then sends the promissory note to the borrower. *Dest Prints (send to Borr):* Select this option to specify that the COD (the destination) prints the promissory note and sends it to the borrower. *Dest Reprint:* Select this option to specify that the COD (the destination) is reprinting a promissory note that was printed previously. *School Prints:* Select this option to specify that the school prints the promissory note and sends it to the borrower.

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Field or Control	Description
Loan Orig Ack Pnote Status (loan origination acknowledgement promissory note status)	Displays the current status of the promissory note. • *(blank)* – Value initially established when Stafford loans (Subsidized and Unsubsidized) origination record is created. System internally recognizes this value as 'no promissory note' available. • *Ack Pending*(acknowledgement pending) – Value represents the MPN Status as reported by COD or may indicate that a promissory note has been created internally by the system. System internally recognizes this value as 'promissory note pending'. • *Accepted* – COD has successfully linked a valid MPN to this loan application ID. Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. • *Closed* – Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. • *Endorser* – Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. This status is used beginning with the 2012–2013 aid year. • *Inactive* – Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. This status is used for the 2011–2012 and prior aid years. • *Print* – Value initially established when Direct PLUS loans (parent or graduate professional) origination record is created. System internally recognizes this value as 'no promissory note' available. • *Rejected* – Status is set when acknowledgment is received from COD and processed by the system. **Note:** *Closed, Endorser,* and *Inactive* MPN values are reported by COD. For disbursement purposes, the system treats *Closed, Endorser,* and *Inactive* MPNs as an *Accepted* MPN. For more information regarding how COD processes MPN's: See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference*
DL Disclosure Print (direct loan disclosure print)	Specifies whether the *COD* or *School* prints the disclosure. You can also select *Reprint* to indicate the disclosure was reprinted. Select *COD* unless the school has a custom print solution. Financial Aid does not support disclosure printing.

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Field or Control	Description
DL Pnote Unique ID (direct loan promissory note unique ID)	Displays the unique identifier assigned to the promissory note that is attached to the loan. The loan origination acknowledgement and the PNote acknowledgement files update this value. Beginning with 2003-2004, the direct loan application processing supports master promissory note requirements for the PLUS loan types. The system adds the letter "N" to the ID to indicate that the loan is PLUS Loan MPN. The system adds the letter "M" to indicate that the loan is a Stafford (subsidized or Unsubsidized) Loan MPN.

PLUS Loan Credit Information

These fields are used when a credit check is necessary for loan approval. This occurs with PLUS loans.

Field or Control	Description
Loan Credit Eligibility	Displays the current status of the credit check. Values are *A-Credit Approved, D-Credit Denied,* or *X-Credit Pending.*
Credit Decision Status	Displays The status of the PLUS credit decision for the loan on COD: • A = Accepted • D = Denied • P = Pending
Loan Credit Decision Dt (loan credit decision date)	Displays the date that the Loan Credit Eligibility decision occurs.
Credit Decision Expiration Dt (credit decision expiration date)	Displays the date on which a potential borrower's credit decision will expire, necessitating the need for another credit check prior to originating a PLUS loan.
Credit Action Choice	Displays the action a borrower plans once the borrower has failed the credit check: • A = Appeal Decision • E = Pursue Endorser • N = Not Pursue PLUS Loan (Process Additional Unsubsidized Loan if Eligible) • U = Undecided

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Field or Control	Description
Credit Action Status	Status of Endorser Pursuit: • D = Credit denied as a result of an endorser's denial • N = Credit denied after pending • L = Endorsed for a Lesser Amount **Note:** If Credit Action Status = L, check to see if Edit 184 is present. If it is, this means that the loan is endorsed for less than the Award Amount, and the institution must submit an Origination Change transaction that reflects an Award Amount equal to or less than the Endorsed Amount. Once COD accepts the Origination Change transaction for the lesser Award Amount (equal to or less than the Endorsed Amount), it sends an Acknowledgment with Edit 183.
Credit Decision Override	Displays the status of the credit checks for this loan on COD as a result of an override. The loan credit values table below dictates the setting of the Loan Credit Eligibility field.
Loan Endorser Amount	Displays the approved Endorser Amount from COD.
Endorser Approved	Displays True or False regarding whether an Endorser Addendum was received and the Endorser was approved:
Credit Requirements Met	Displays True or False regarding whether borrower has met all of the credit requirements for the PLUS loan. If the loan was originally denied, this also includes the PLUS Credit Counseling. Must be True before the loan may be disbursed.
Original Credit Decision	Displays the initial credit decision for a PLUS borrower. If denied, the borrower may choose to appeal the decision due to extenuating circumstances or seek an endorser for the loan. • A = Accepted • D = Denied
Reconsideration Eligible	Displays True or False regarding whether the applicant is eligible for reconsideration of the PLUS loan when the PLUS was originally denied.
Credit Appeal Status	Displays the current status of a credit appeal: • A = Appeal Accepted • D = Appeal Denied • P = Appeal Pending • R = Appeal Closed Without Final Decision
Counseling Completed	Displays True or False regarding whether the borrower has completed the requisite PLUS Counseling directly with COD – required for PLUS applicants who have obtained an approved endorser or an approved credit appeal due to extenuating circumstances. Must be complete before the loan may be disbursed.

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Field or Control	Description
Counseling Complete Dt (counseling complete date)	Displays the date on which PLUS Counseling was completed by the borrower.
Counseling Expiration Dt (counseling expiration date)	Date on which PLUS Counseling expires.
Counseling Exception	Reserved for future use by COD.
Credit Balance Option	Indicates whether a credit balance on a loan should be directed to the student or the borrower: • B = Borrower • S = Student
Relationship to Student	Displays the student's relationship to the PLUS borrower: • P — Biological Parent. • A — Legal Adoptive Parent. • S — Spouse of the Biological or Legal Adoptive Parent. • O — Other.

Loan Credit Value	Explanation
C – Credit overridden as a result of new credit information provided	Changes the Loan Credit Eligibility to Credit Approved.
D – Credit denied as a result of an endorser's denial	Changes the Loan Credit Eligibility to Credit Denied.
E – Credit overridden as a result of an endorser's approval	Changes the Loan Credit Eligibility to Credit Approved.

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Loan Credit Value	Explanation
L – Lower Endorser Amount	Changes the Loan Credit Eligibility to Credit Denied. Value represents a credit check where endorser is approved, but the endorsed amount is less than the award amount requested by the borrower. Edit 184 accompanies this Lower Endorsed Amount condition-- "Financial Award Amount exceeds Endorser Amount" is returned when a PLUS award is submitted with an existing valid Endorser linked and the Financial Award Amount is greater than the Endorser Amount." Credit eligibility remains denied with COD. School's action is to resubmit an award record with the award amount less than or equal to the endorser amount. COD requires an entire award record to be submitted. The Loan Origination Change process generates the appropriate award record. Schools should: 1) Reduce award amount in packaging; 2) Run Process Loans with adjustments (FAPLBOG1) to carry forward the new award amount to the loan application; 3) Generate an Origination Change. A entire award record is created only if the loan award amount is less than or equal to the endorser amount. All subsequent origination changes (except if the amount is set to zero) are held until the loan application has been updated with an accepted award adjustment by COD and response has been loaded into the system.
N – Denied after Pending	Changes the Loan Credit Eligibility to Credit Denied.

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> **Note**
>
> The COD Inbound process checks the **Credit Requirements Met** field to see if the loan is eligible to be disbursed. Based on the type of candidate being evaluated, Credit Appeal Candidate or Credit Action Candidate, the system uses the following criteria for disbursement eligibility:
>
> *Credit Appeal Candidate* – This is an applicant who pursued an appeal for extenuating circumstances for an originally denied PLUS Loan. If **Loan Credit Eligibility** equals Credit Approved and **Credit Requirements Met** equals Yes, the loan is eligible to be disbursed from a PLUS Credit Check perspective.
>
> *Credit Action Candidate* – This is an applicant who pursued an Endorser for an originally denied PLUS Loan. If **Loan Credit Eligibility** equals Credit Approved, **Credit Requirements Met** equals Yes, and Edit 184 is not present, the loan is eligible to be disbursed from a PLUS Credit Check perspective. However, if Edit 184 is present, then this indicates that COD endorsed the loan for an amount less than Award Amount. The institution must submit an Origination Change transaction that reflects an Award Amount reduction equal to or less than the Endorsed Amount. Once COD accepts the Origination Change transaction for the lesser Award Amount (equal to or less than the Endorsed Amount), it sends an Acknowledgment Response file with Edit 183 which replaces Edit 184. The loan is then eligible to be disbursed from a PLUS Credit Check perspective.

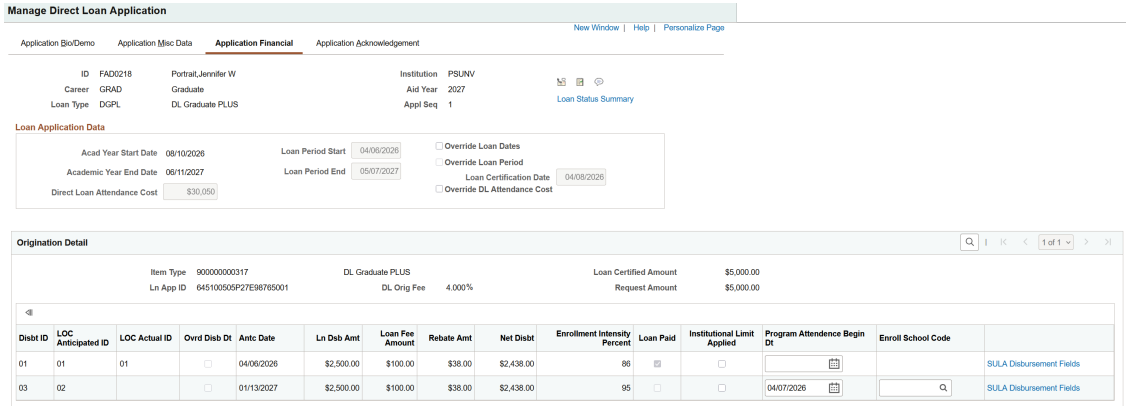
Informed Borrowing

This region displays the Informed Borrowing tags, which tells you whether the borrower (student or parent) has completed the Annual Student Loan Acknowledgment process.

Processing and Reviewing Financial Data

Access the Application Financial page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Financial**).

This example illustrates the fields and controls on the Application Financial page, Disbursement tab. You can find definitions for the fields and controls later on this page.



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Loan Application Data

Field or Control	Description
Acad Year Start (academic year start) and **Academic Year End Date**	These fields display the start and end dates for the academic year. These values are derived from the Aid Year table and can only be changed there.
Direct Loan Attendance Cost	Displays the calculated Direct Loan Cost of Attendance. This includes, but isn't limited to, tuition and fees, room and board, books and supplies, transportation, insurance, and miscellaneous personal expenses. This field can be manually updated by selecting the **Override DL Attendance Cost** check box.
Override DL Attendance Cost (override direct loan attendance cost)	Select this check box to enable editing of the **Direct Loan Attendance Cost** field. Once selected, the overridden value is maintained and used in all generated COD files regardless of other updates to Cost of Attendance in other areas.
Loan Period Start	Displays the start date for the loan period. This date is generated from the Valid Careers for Terms table. This date is derived using the first day of the first term in which the anticipated distribution of the student's award is to be made.
Loan Period End	Displays the end date for the loan period. This date is generated from the Valid Careers for Terms table. This date is derived using the last day of the final term in which the anticipated distribution of the student's award can be made.
Override Loan Dates	Select to override and edit the loan dates. The dates are for this loan record only. When you select the check box, the date fields become available. After you edit the date fields, you must save the record.
Override Loan Period	This check box is accessible only after you select the **Override Loan Dates** check box. Select to change the start and end dates for the loan period. In addition, when you select this check box you prevent loan adjustments from updating the changes you made to the loan period start and end dates.
Loan Certification Date	Indicates the date that the loan is originated.

Origination Detail

Field or Control	Description
Item Type	Displays the financial aid item type and description for the loan. If available, click the link next to this field to access the Award Entry and the Award Activity pages.

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Field or Control	Description
Ln App ID (loan application ID)	Displays the unique identifier that the Loan Origination process generated for this loan.
DL Orig Fee (direct lending origination fee)	Displays the fee charged to the borrower to originate the loan.
Loan Certified Amount	Displays the amount approved for the loan. This value is derived from the offer/accept amount for the award.
Request Amount	Displays the Accepted amount for the award and represents the Scheduled Disbursement Amount.
Disb ID (disbursement ID)	Displays the disbursement ID given to this disbursement in awarding.
LOC Antic ID (loan origination center anticipated ID)	Displays the sequentially ordered ID for the anticipated disbursement. The system converts the Disbursement ID that comes from the award and the anticipated disbursement date defined in the Disbursement ID setup to assist in defining the disbursement sequencing requirements. The **LOC Antic ID** represents the Disbursement Number for anticipated disbursements (Disbursement Release Indicator set to 'false). The **LOC Antic ID** may change if additional disbursements are added. However, once an associated **LOC Actual ID** has been assigned, the **LOC Antic ID** does not change.
LOC Actual ID (loan origination center actual ID)	Displays the numerically ordered disbursement ID, without skipping numbers. The **LOC Actual ID** represents the Disbursement Number for actual disbursements (Disbursement Release Indicator set to 'true'). This field is empty until the loan is disbursed to Student Financials. This field is populated when the authorization and disbursement processes are completed and the Direct Loan Out for the Disbursement Process has been run. The COD Actual ID is what is sent to the COD with the Disbursement file.
Ovrd Disb Dt (override disbursement date)	Select to override and change the current requested disbursement date. If you select this check box and edit the field, the new value remains in effect regardless of future adjustments.
Antc Date (anticipated date)	Displays the anticipated date for this loan disbursement. This date is derived from the disbursement date specified in the Disbursement ID table.
Ln Dsb Amt (loan disbursement amount)	Displays the gross scheduled disbursement amount. This value is derived from the Accepted balance on the award disbursement.
Ln Fee Amt (loan fee amount)	Displays the fee amount associated with the scheduled disbursement. This amount is derived from the Accepted fee balance.

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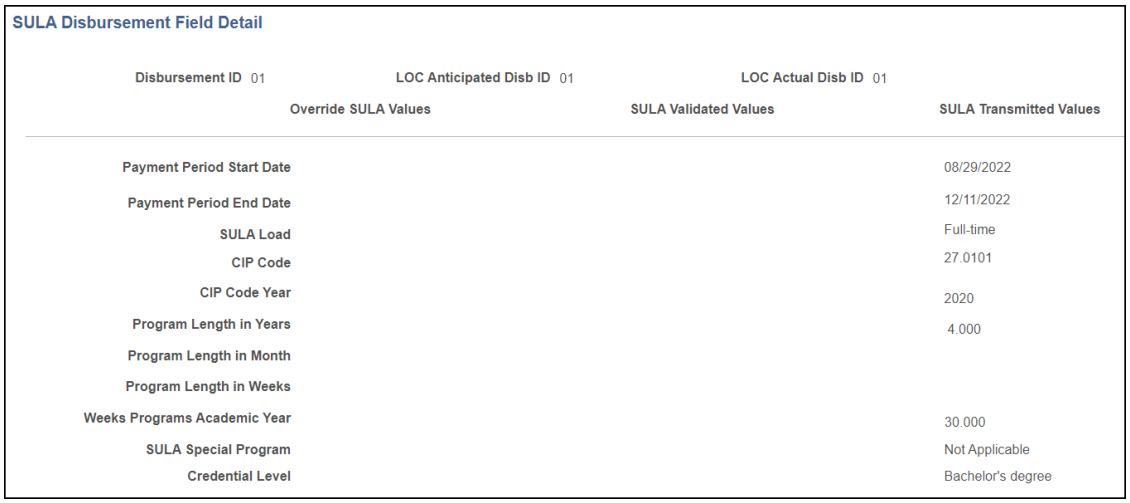
Field or Control	Description
Rebate Amt (amount)	Displays the interest rebate fee amount. The system populates this field from packaging fee information.
Net Disb (net disbursement)	Displays the amount scheduled for disbursement to the student. This value equals the loan disbursement amount minus the loan fee amount plus any rebate amount.
Enrollment Intensity Percent	Represents the student's enrollment level for the payment period. This value is required for new disbursements for aid year 2026–2027 and later.
Loan Paid	This check box is selected when the loan funds are disbursed to the student's account.
Institutional Limit Applied	Indicates whether the institution has applied a program-specific loan limit. This is a manually maintained field (true/false) and is not system-derived.
Program Attendance Begin Date	Represents the date when transferred credits are applied to an undergraduate program. This applies only to undergraduate loans. The format is CCYY-MM-DD.
Enroll School Cd (enrollment school code)	The Enrollment School Code represents the physical location of the student at the disbursement level. The Enrollment School Code reported is the OPEID of the Campus of the Financial Aid Term associated with the disbursement ID. • When the award is originated this field is blank and editable by default. • The Enrollment School Code can be overridden on the page or by Population Update for disbursements not yet reported to COD. • When a disbursement is transmitted to COD, the field becomes display only and is either *blank* to indicate that the setup value was used or displays the override value. See Defining Your Campus OPEID Codes.
SULA Disbursement Fields (subsidized usage limit applies disbursement fields)	Click this link to open the **SULA Disbursement Field Detail** page. From AY 2021 or later, you can override the CIP Code Year on this page.

> **Note**
>
> Oracle delivers the QA_CS_FA_DL_CROF query to compare cleaned-up loan fee data received from COD with a CROFyyOP message class to system loan application data to identify loans that have a mismatch in loan origination percentages and/or rebate amounts.

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Access the SULA Disbursement Field Detail page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Financial**, and then **SULA Disbursement Fields link**).

This example illustrates the fields and controls on the SULA Disbursement Field Detail page.



Use this page to override SULA Disbursement information. You can override any of the fields on this page until Disbursement Outbound occurs.

The SULA Validated Values column is populated after a validation process compares values in the Student Term View and the Override fields for Origination, Origination Change (on only the Disbursement block fields), and Disbursement.

The SULA Transmitted Values column reflects the SULA value during the Origination Outbound and Disbursement Outbound processes.

Field or Control	Description
CIP Code Year	This field appears if the award year is equal to or later than 2021. The value you enter here appears on the SULA Disbursement Field Detail page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Disbt Actions**).

The **Payment Period Start Date**, **SULA Load**, and **CIP Code** fields can be updated in batch via Population Update.

> **Note**
>
> For COD Originations and Origination Changes, all SULA Load values are reported to COD as "Full-time" for all loans unless there is a **SULA Load** override value entered on this page.
>
> For COD Disbursements, either the student's actual SULA Load or, if entered in this page, the **SULA Load** override is reported to COD.

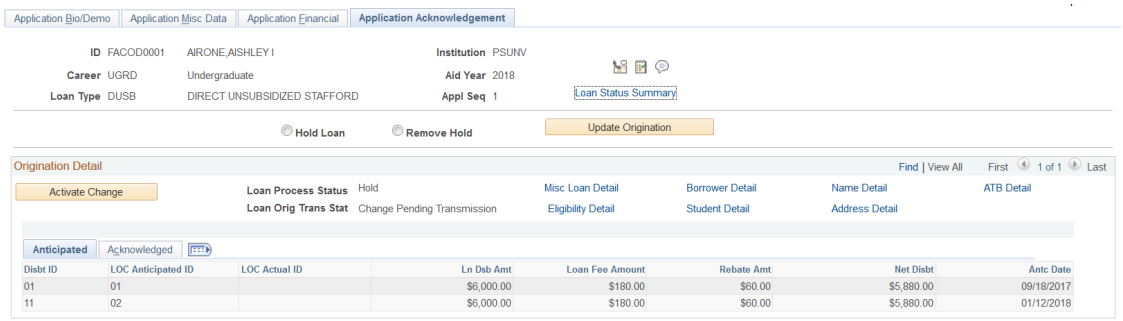
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> **Note**
>
> Once the amount associated with a particular Disbursement ID has been disbursed to the student's account, you are not permitted to override the disbursement-level SULA fields.

Processing and Reviewing Loan Application Acknowledgement Data

Access the Application Acknowledgement page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Acknowledgement**).

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



To perform one of the following actions, select the appropriate option and click the **Update Origination** button.

Field or Control	Description
Hold Loan	Select this option to manually change the loan processing status to *Hold.* Selecting this option suspends processing for this loan record. If you set a loan on hold, the system generates an exception message for this activity on the Loan Exception Messages page. After the exception message is generated, you can enter a comment for audit purposes.
Remove Hold	Select this option to manually remove a hold from a student's loan and permit loan processing to continue. If you remove a loan from hold, the system generates an exception message for this activity on the Loan Exception Messages page. After the exception message is generated, you can enter a comment for audit purposes.

> **Note**
>
> **Hold Loan** and **Remove Hold** can be updated using Population Update.

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See Campus Community Fundamentals: Using the Population Selection Process.

Origination Detail

Field or Control	Description
Activate Change	Click this button to have the Loan Adjustment process review the student for change transactions. Data changes in the Direct Loan Application component or the Award Entry page do not require you to manually start the Loan Adjustment process here. Click the **Activate Change** button to start the Loan Adjustment process for other data changes (for example, the student or borrower name).
Loan Process Status	Displays the current status of the loan. Values are: *Cancelled:* Not used for Direct Lending. *Hold:* Indicates the COD rejected an activity or a user manually set the loan status to Hold. The system suspends all loan processing until the hold is removed. *Offered and Not Accepted:* Indicates that a loan transmission based on an offer is not transmitted until the award is accepted. *Origination Pending:* Indicates a pending origination that has not been transmitted to the COD. *In Service:* Indicates the loan has been transmitted to the COD. *Terminated:* Indicates the award is cancelled and the Offer amount is set to zero prior to transmission to the COD.
Loan Orig Trans Stat (loan origination transmission status)	Indicates the current status of the loan origination. Values are: *Accepted:* Indicates the COD has accepted the loan. *Change Pending Transmission:* Indicates an adjustment generated a change transaction that has not been sent to the COD. Any further changes entered alter the change record until the transmission occurs. *Error:* Represents an acknowledgement from the COD indicating a rejection of an origination or origination change record. *Origination Pending Transmission:* Indicates an Origination that has not been transmitted to the COD. *Transmitted:* Indicates that an acknowledgement from the COD is due regarding an origination or an origination change record. All loan change activity is suspended until the acknowledgement arrives.
Misc Loan Detail (miscellaneous loan detail)	Click to access the Miscellaneous Loan Detail page, where you can review printing information, origination fees, and academic year start/end dates.

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Field or Control	Description
Eligibility Detail	Click to access the Loan Eligibility Detail page, where you can review information on the student's loan eligibility.
Borrower Detail	Click to access the Borrower Detail page, where you can review the borrower's demographic information.
Student Detail	Click to access the Student Detail page, where you can review the student's demographic information.
Name Detail	Click to access the Name Detail page, where you can review the name on the loan.
Address Detail	Click to access the Address Detail page, where you can review or override the address for the loan.
ATB Detail (ability to benefit detail)	Displays a link to Ability to Benefit information if present. Click the link to view Ability to Benefit data. See Managing Ability to Benefit.

Anticipated Tab

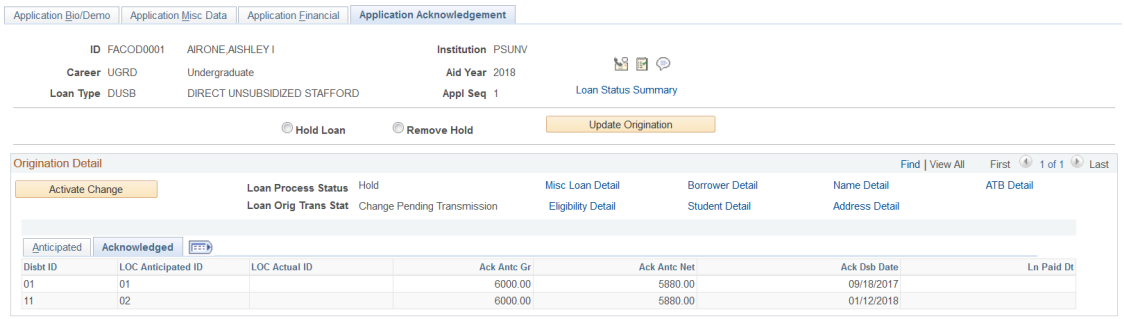
For definitions of the fields that appear on this tab:

See Processing and Reviewing Financial Data.

Acknowledged Tab

Select the Acknowledged tab.

This example illustrates the fields and controls on the Application Acknowledgement page: Acknowledged tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Ack Antc Gr (acknowledged anticipated gross)	Displays the acknowledged anticipated gross disbursement amount, as acknowledged by the COD. This amount is derived from the offer balance on the award. The sum of the anticipated gross amounts for this loan equals the loan certified amount.

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Field or Control	Description
Ack Antc Net (acknowledged anticipated net)	Displays the acknowledged anticipated net amount, which represents the maximum disbursement for the student, as acknowledged by the COD. This amount is equal to the difference between the anticipated gross and the anticipated fee amounts.
Ack Dsb Date (acknowledged disbursement date)	Displays the acknowledged disbursement date, which is the expected disbursement date, as specified on the acknowledgment record.
Ln Paid Dt (loan paid date)	Displays the actual date of the disbursement after the loan funds are disbursed to the student's account and the **Loan Paid** check box is selected.

Viewing Miscellaneous Loan Details

Access the Miscellaneous Loan Detail page (click the **Misc Loan Detail** link on the Application Acknowledgement page).

The field values are derived from the Origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the **ORIGINATED** and **ACKNOWLEDGED** sections are completed. If your institution has not received an acknowledgement or the Origination is rejected, only the **ORIGINATED** section is complete.

Viewing Loan Eligibility Details

Access the Loan Eligibility Detail page (click the **Eligibility Detail** link on the Application Acknowledgement page).

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the **ORIGINATED** and **ACKNOWLEDGED** sections are completed. If an acknowledgement has not been received or the origination is rejected, only the **ORIGINATED** section is complete.

Viewing Borrower Details

Access the Borrower Detail page (click the **Borrower Detail** link on the Application Acknowledgement page).

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the **ORIGINATED** and **ACKNOWLEDGED** sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the **ORIGINATED** section is complete.

Viewing Student Details

Access the Student Detail page (click the **Student Detail** link on the Application Acknowledgement page).

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the **ORIGINATED** and **ACKNOWLEDGED** sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the **ORIGINATED** section is complete.

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Viewing Name Details

Access the Name Detail page (click the **Name Detail** link on the Application Acknowledgement page).

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the **ORIGINATED** and **ACKNOWLEDGED** sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the **ORIGINATED** section is complete.

Viewing Address Details

Access the Address Detail page (click the **Address Detail** link on the Application Acknowledgement page).

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the **ORIGINATED** and **ACKNOWLEDGED** sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the **ORIGINATED** section is complete.

Viewing ATB Details

Access the Address Detail page (click the **ATB Detail** link on the Application Acknowledgement page).

The field values display the most current sequence row captured on the Manage Ability to Benefit component. The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the ORIGINATED and ACKNOWLEDGED sections are both populated. If your institution has not received an acknowledgement or the origination is rejected, only the ORIGINATED section is populated.

See Managing Ability to Benefit.

Viewing SULA Details

Access the SULA Loan Detail page (click the **SULA** link on the Application Acknowledgement page).

These are award-level fields that are reported to COD.

Field or Control	Description
Program Length in Months, **Program Length in Weeks**, **Program Length in Years**	Displays the Program Length based on Program Length Type and Program Length values in the Academic Plan setup. See Campus Solutions Application Fundamentals: Setting Up Taxonomy.
Weeks Programs Academic Year	Displays the number of weeks in a Program's Academic Year based on the following logic: 1. Check for a Student override for **Acad Base Weeks**. If it exists, use it. If not, 2. Check for an Academic Program-level **Acad Base Weeks**. If it exists, use it. If not, 3. Use Financial Aid Installation **Acad Base Weeks**.
SULA Special Program	Displays the SULA Special Program from the Financial Aid Term record.

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Field or Control	Description
Credential Level	Displays the Credential Level based on the Credential Level Cross Reference setup. See Setting Up 150 Percent Direct Subsidized Loan Limit (SULA).

Viewing and Overriding Bio/Demo Data for Direct Lending

This section discusses how to:

- View direct loan name information.
- Override direct loan phone information.
- View direct loan address information.
- Override direct loan email information
- Override direct loan application information.
- Override informed borrower information.

Changes you make here do not change the Campus Community data. You must save changes to data made on these pages. To commit the data you override to the Origination file and application pages, go to **Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **App Acknowledgement** and click the **Activate Change** button. Then re-run Origination with adjustments.

> **Note**
>
> The system sends Bio/Demo data to the COD. If you choose to override data on any of these pages, ensure the changes are accurate. If the student has more than one Stafford loan type such as a subsidized and unsubsidized loan and if both loans have been created and originated, you must ensure that changes are reflected on each loan type for the student.

Pages Used to Override Bio/Demo Data for Direct Lending

Page Name	Definition Name	Navigation	Usage
Direct Loan Name	LOAN_NAME	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Name**	View the current name information on a direct loan record. This is a view only page.

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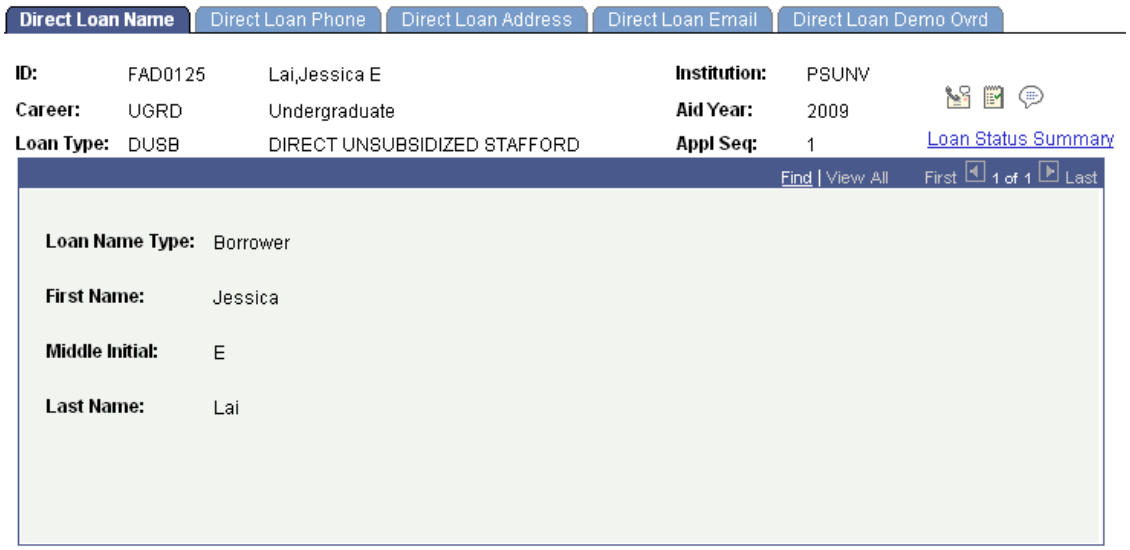
Page Name	Definition Name	Navigation	Usage
Direct Loan Phone	LOAN_PHONE	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Phone**	Override telephone information on the direct loan record.
Direct Loan Address	LOAN_ADDRESS	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Address**	View address information on the direct loan record.
Direct Loan Email	LOAN_EMAIL	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Email**	Override email information on the direct loan record. For direct lending, the email address is restricted to 50 characters and must follow email address identification protocol.
Direct Loan Demo Ovrd	LOAN_DMO_OVRD_DL	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Demo Ovrd**	Override Campus Community or institutional application information.
PLUS Credit Override	LOAN_ORIG_ELG_DL01	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **PLUS Credit Override**	Override PLUS Loan Credit Information fields.
Informed Borrower Override	SFA_LN_IBT_OVRD	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Informed Borrower Override**	Override informed borrower information.

Viewing Direct Loan Name Information

Access the Direct Loan Name page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Name**).

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



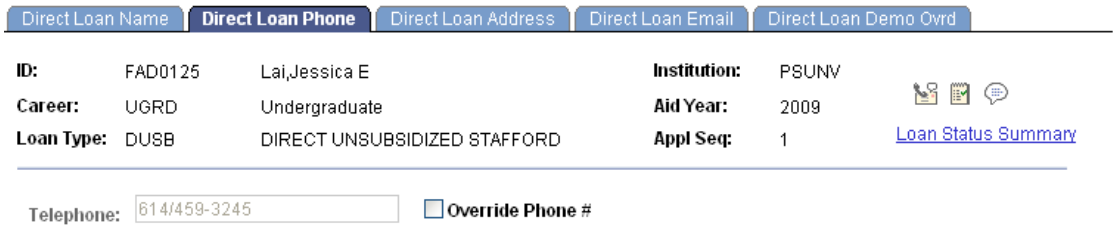
The system displays the **ID, Career, Loan Type, Institution, Aid Year,** and **Appl Seq** (application sequence).

The **Loan Name Type** and the full name of the borrower are displayed. If multiple name types are associated with the loan, all are displayed. These fields are display only.

Overriding Direct Loan Phone Information

Access the Direct Loan Phone page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Phone**).

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



Field or Control	Description
Telephone	Displays the current telephone number for the borrower. This phone number originates from Campus Community. This field is display only until you select the **Override Phone** check box.

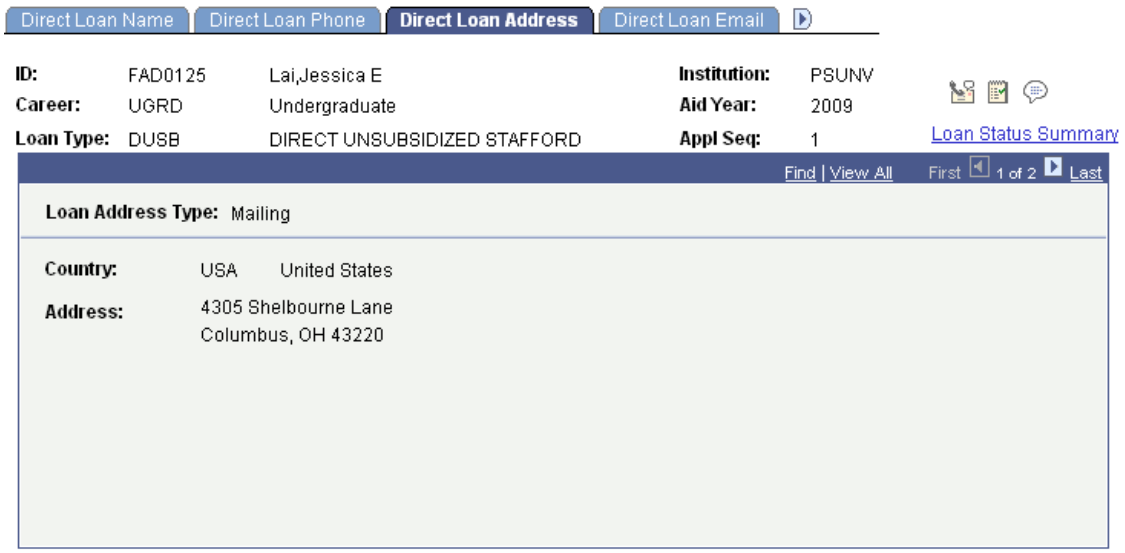
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Field or Control	Description
Override Phone	Select to override the current phone number on the loan record only. Selecting the check box activates the **Telephone** field. If you override this phone number, future adjustments to Campus Community information do not update this field. If you clear this check box, the system reinserts the telephone number originating from Campus Community.

Viewing Direct Loan Address Information

Access the Direct Loan Address page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Address**).

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



Field or Control	Description
Loan Address Type	Specifies the type of address displayed.
Country	The address fields change depending on the country you select. You can only select a country if you select the **Override Address** check box.

> **Note**
>
> To make address changes, use the Addresses page in Campus Community (Managing Biographical Information, Managing Addresses and Phone, Addresses).

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Overriding Direct Loan Email Information

Access the Direct Loan Email page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Email**).

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

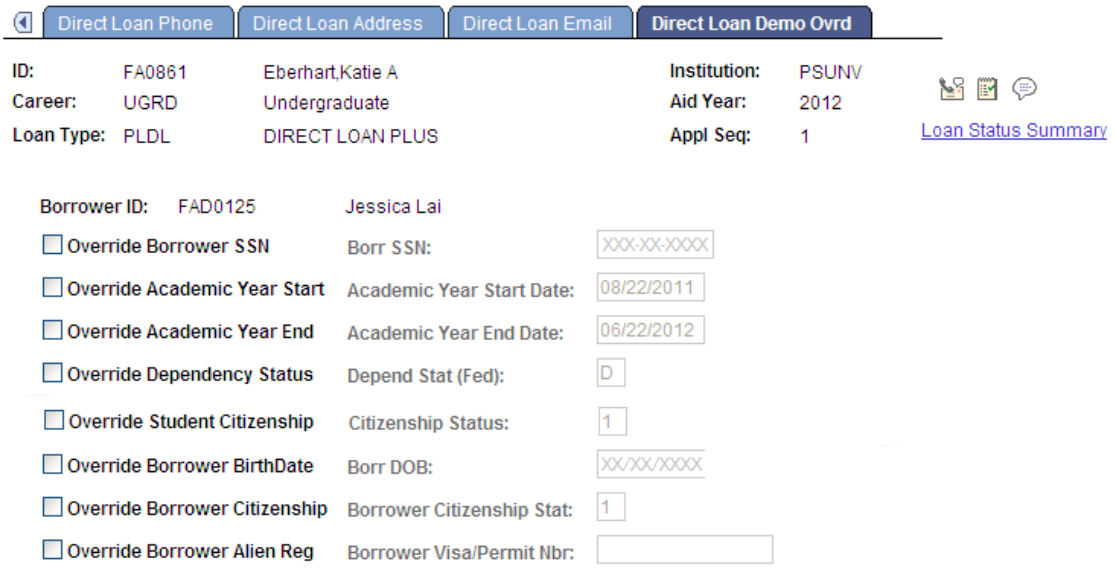


Field or Control	Description
Override Email Address	Select to override the student's email address. Enter the updated or changed email address in the field. If you override the student's email address, future adjustments to Campus Community information do not update this field. If you clear this check box, the system reinserts the email information originating from Campus Community.

Overriding Direct Loan Application Information

Access the Direct Loan Demo Ovrd page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Direct Loan Demo Ovrd**).

This example illustrates the fields and controls on the Direct Loan Demo Ovrd page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Override Borrower SSN	Select to change the borrower's social security number or date for the SSN.
Override Academic Year Start	Select to change the start date of the academic year for this borrower.
Override Academic Year End	Select to change the end date of the academic year for this borrower.
Override Dependency Status	Select to change the borrower's federal dependency status.
Override Student Citizenship	Select to change the student's citizenship status. The values acceptable to COD for Student Citizenship Stat are: • *1*- Native • *2*- Naturalized • *3*- Alien Permanent **Note:** This option only appears for parent PLUS loans.
Override Borrower BirthDate	Select to change the borrower's date of birth and to enter the date you changed the date of birth.
Override Borrower Citizenship	Select to change the borrower's citizenship status. The values acceptable to COD for Borrower Citizenship Stat are: *1: Native* *2: Naturalized* *3: Alien Permanent* **Note:** Override Borrower Citizenship can be updated using Population Update for Stafford and GRAD PLUS loans. Population Update can also update the 'student' citizenship field for a DL PLUS parent application. See Campus Community Fundamentals: Using the Population Selection Process.
Override Borrower Alien Reg (override borrower alien registration)	Select to change the borrower's alien registration or Visa/permit number.

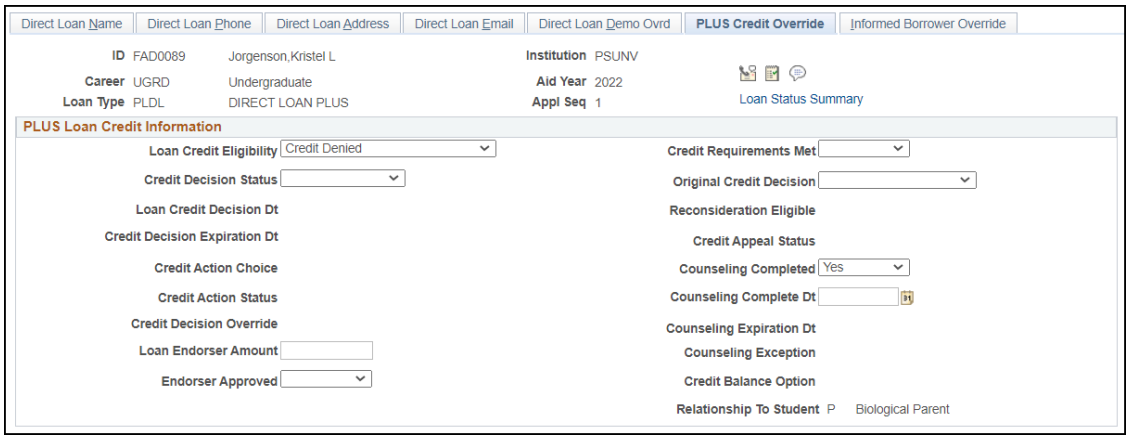
> **Warning**
>
> If you override these required fields, *your institution takes full responsibility* for the data you transmit that may be in conflict with existing institutional records. Access to this page should be limited to key personnel.

Overriding PLUS Credit Decisions

Access the Direct Loan Demo Ovrd page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **PLUS Credit Override**).

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This example illustrates the fields and controls on the PLUS Credit Override page. You can find definitions for the fields and controls later on this page.

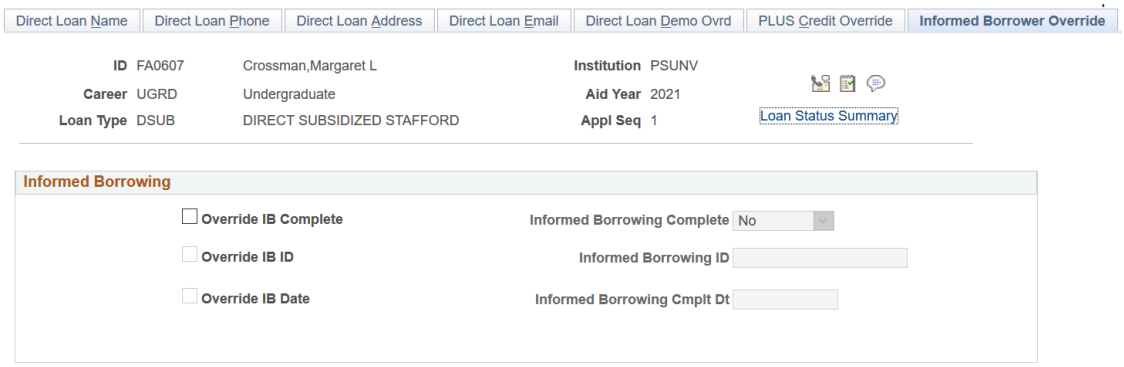


Use this page to override PLUS Loan Credit Information fields.

Overriding Informed Borrower Information

Access the Informed Borrower Override page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Loan Application Data**, and then **Informed Borrower Override**).

This example illustrates the fields and controls on the Informed Borrower Override page. You can find definitions for the fields and controls later on this page.



Use this page to override the Informed Borrowing tags, so that direct loan borrowers who complete the Annual Student Loan Acknowledgment process can receive the first disbursement on their direct loan.

Field or Control	Description
Override IB Complete	Select to override the value in the Informed Borrowing Complete field.

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Field or Control	Description
Informed Borrowing Complete	This is available only when you select the Override IB Complete check box. Select *Yes* to indicate that the student has completed the Informed Borrowing Confirmation process.
Override IB ID (Override Informed Borrowing ID)	Select to override the value in the Informed Borrowing ID field.
Informed Borrowing ID	This is available only when you select the Override IB ID check box. Enter the Informed Borrowing ID.
Override IB Date (Override Informed Borrowing Date)	Select to override the value in the Informed Borrowing Cmplt Dt field.
Informed Borrowing Cmplt Dt (Informed Borrowing Completion Date)	This is available only when you select the Override IB Date check box. Select the appropriate date.

> **Warning**
>
> If you override these required fields, *your institution takes full responsibility* for the data you transmit that may be in conflict with existing institutional records as well as any disbursements that occur in relation to this override. Access to this page should be limited to key personnel.

Overriding and Viewing Direct Loan Origination Data and Action Messages

This section discusses how to:

- Override direct loan origination data.
- View direct loan origination action messages.
- Review the loan origination action history.
- Review direct loan disbursement actions.
- Review loan exception messages.

Related Topics

- Reviewing COD Data for Pell Grants and Direct Loans
  The View COD Data component is used to view all COD data for all COD award programs supported by the system: Pell Grant and Direct Loan. The View COD Data component presents both inbound and outbound COD data.

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Pages Used to Override and View Direct Loan Origination Data and Action Messages

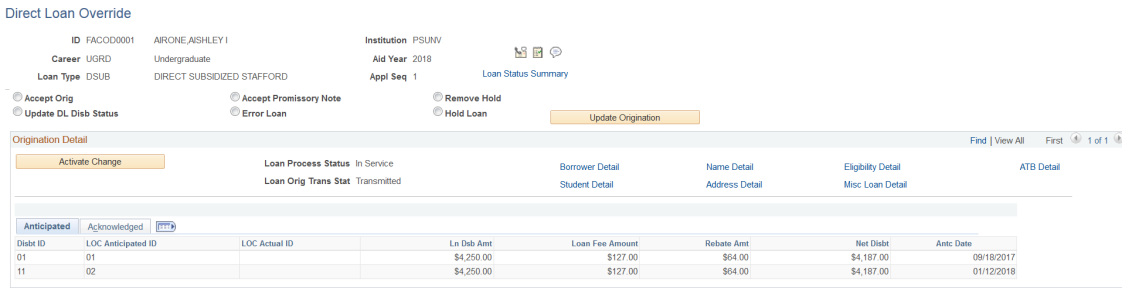
Page Name	Definition Name	Navigation	Usage
Direct Loan Override	LOAN_ORIG_ACK_DL01	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Processing Status**, and then **Direct Loan Override**	Manually accept a loan origination, manually accept a promissory note, update the disbursement status, put the loan in hold or error status, and remove a hold from the loan.
Direct Loan Orig Actions (direct loan origination actions)	LN_DL_ORIG_INQ	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Orig Actions**	Review actions and errors pertaining to origination, origination change, and validation.
Direct Loan Disbt Actions (direct loan disbursement actions)	LN_DL_DISB_INQ	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Disbt Actions**	View the disbursement actions associated with the loan.
Direct Loan SULA Response (direct loan subsidized usage limit applies response)	SFA_DL_SULA_ACTN	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Disbt Actions**	View SULA response associated with the loan.
Loan Exception Messages	LN_MSG_INQ	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Loan Exception Messages**	View messages pertaining to loan processing, such as why a loan is on hold or explanations for manual overrides performed. The information contained in this page is cumulative for the particular loan.

Overriding Direct Loan Origination Data

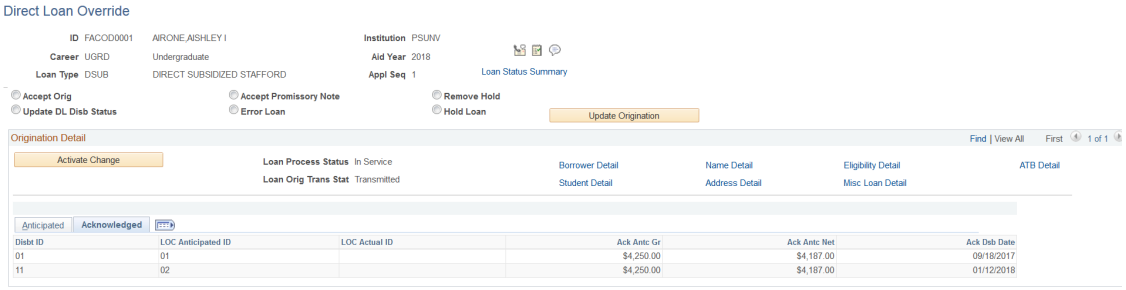
Access the Direct Loan Override page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Override Processing Status**, and then **Direct Loan Override**).

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This example illustrates the fields and controls on the Direct Loan Override page – Anticipated tab.



This example illustrates the fields and controls on the Direct Loan Override page – Acknowledged tab.



> **Warning**
>
> Use extreme caution when updating loan records with this page. Future processing and dollar amounts are based on these loan amounts and loan statuses.

> **Note**
>
> If you override these required fields, your institution must take full responsibility for the data you submit to Common Origination and Disbursement (COD) that may be in conflict with existing institutional records. Access to this page should be limited to key personnel.

With the exception of the fields listed below, the fields on this page are the same as those on the Application Acknowledgement page.

To perform one of the following actions, select the appropriate option and click the **Update Origination** button.

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Field or Control	Description
Accept Orig (accept origination)	Perform this action only if you do not expect to receive an acknowledgement file from the COD. Selecting this option accepts the current originated loan amounts. The system populates the transmitted fields with the same amount as the originated fields. This is the same as receiving a Loan Origination Acknowledgment file. Selecting this option also manually releases a loan from *Error* status.
Update DL Disb Status (update direct lending disbursement status)	If you select this option, the system reevaluates the disbursement status for a student. Perform this action when you manually override the credit status for a PLUS loan type or you change the switches on the loan type.

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Field or Control	Description
Accept Promissory Note	Select this option to override a promissory note acknowledgement by manually accepting a promissory note. Use this option if you did not or do not expect to receive a promissory note acknowledgement from the COD or if the promissory note was rejected and you want to authorize a disbursement and report and transmit the disbursed award to the COD on behalf of the borrower. When you click the **Update Origination** button, the system does the following: • The system checks the **Loan Pnote Stat** (promissory note status) field. If the status value is *Accepted,* no further processing occurs. If status is not *Accepted,* the system checks to see if a promissory note record has been created. If no promissory note record exists, the system creates an entry in the promissory note table for this loan. • The system updates the promissory note status on both the promissory note table and on the loan origination record to *A - Accepted.* • The system insets an entry into the promissory note action table to indicate that the promissory note was manually accepted. You can view this information on the Direct Loan PNote page **(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Review Promissory Note Actions**, and then **Direct Loan PNote)**or on the (view only) Direct Loan PNote Action page **(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Promissory Note Actions**, and then **Direct Loan PNote Action).** • The system inserts a message into the Loan Exception Messages page **(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Loan Exception Messages)** indicating that the promissory note was manually accepted. You can make additional comments to explain why you manually accepted the promissory note. • The system reevaluates the disbursement status. If the promissory note was the only criteria keeping the loan from being disbursed, the system updates the appropriate fields to allow for the disbursement of the loan funds.

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> **Important**
>
> Use the promissory note acknowledgement override with caution. If the COD rejects a promissory note after you have overridden the promissory note acknowledgement the loan's status is un-booked. To get the loan to a booked status and properly disburse the funds, this situation must be resolved directly with the COD.

Field or Control	Description
Error Loan	Perform this action only if you do not expect to receive an acknowledgement file from the COD. Selecting this option changes the Orig Trans Stat (origination transmission status) to *Error*. This simulates receiving an COD Acknowledgement that rejects the origination or origination change record. This results in loan adjustments reevaluating the loan for changes based on the current acknowledgement values.

> **Note**
>
> When you perform any of the above actions, the system generates an exception message that you can review on the Loan Exception Messages page. You are encouraged to note exceptions by adding your own detail.

Viewing Direct Loan Origination Action Messages

The Direct Loan Actions Inquiry component is view only and is designed to provide status and processing information to staff who may or may not be directly involved with the processing of Direct Lending files, but may need access to direct lending information.

You use the DL Actions Inquiry component to view origination and disbursement action history and loan exception messages.

For SULA processing, Oracle delivers a sample PS Query (QA_CS_FA_SULA_STUDENT) to assist you in evaluating the COD reporting readiness of your students as it relates to their SULA fields. You can run this before attempting to outbound an Origination, Origination Change, or Disbursement transaction. The query includes all of the SULA-related fields that are validated during the Outbound process.

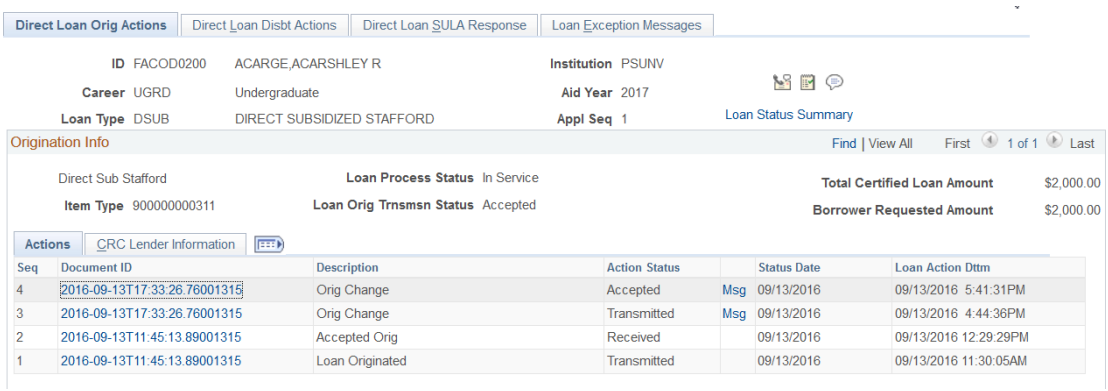
> **Note**
>
> For the SULA sample query, you must update the criteria to reflect the corresponding Aid Year's FA Terms and EMPLID list.

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Reviewing the Loan Origination Action History

Access the Direct Loan Orig Actions page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Orig Actions**).

Orig/Orig Chg Validate Errors – FA860A • > Disb Validation Error Report – FA860B This example illustrates the fields and controls on the Direct Loan Orig Actions page. You can find definitions for the fields and controls later on this page.



The system displays the **ID, Career, Loan Type, Institution, Aid Year,** and **Appl Seq** (application sequence) values. The application sequence number increases each time the system creates a new loan origination record for each ID, career, loan type, institution, and aid year combination.

The following fields are derived from the Loan Origination record.

Field or Control	Description
Item Type	Displays the financial aid item type associated with this loan.
Loan Process Status	Displays the current status of the loan. Values are: *Cancelled:* Not used for direct lending. *Hold:* Indicates the COD rejected an activity or a user manually set the loan to hold status. The system suspends all loan processing until the hold is removed. *Offered and Not Accepted:* Indicates that a loan transmission based on an offer is not be transmitted until the award is accepted. *Origination Pending:* Indicates a pending origination that has not been transmitted to the COD. *In Service:* Indicates the loan has been transmitted to the COD. *Terminated:* Indicates the award is cancelled and the Offer amount is set to zero prior to transmission to the COD.

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Field or Control	Description
Loan Orig Trans Stat (loan origination transaction status)	Indicates the current status of the loan origination. Values are: *Accepted:* Indicates the COD has accepted the loan. *Change Pending Transmission:* Indicates an adjustment generated a change transaction that has not been sent to the COD. Any further changes entered alter the change record until the transmission occurs. *Error:* Represents an acknowledgement from the COD indicating a rejection of an origination or origination change record. *Origination Pending Transmission:* Indicates an Origination that was not transmitted to the COD. *Transmitted:* Indicates that an acknowledgement from the COD is due regarding an origination or an origination change record. The system suspends all loan change activity until the acknowledgement arrives.
Total Certified Loan Amt (total certified loan amount)	Indicates the amount approved for the loan. This value is derived from the offer amount on the Award.
Borrower Requested Amount	Derived from the Accepted Amount on the Award and represents the Certified Amount to be reported to the COD.

Actions Tab

Field or Control	Description
Seq (sequence)	Displays the origination action sequence generated from the loan record activity. When multiple sequences exist for a loan, they display in reverse order; the most recent sequence displays at the top.
Document ID	Click this hyperlink to the View COD Data component which represents the COD Staging Table results. **Note:** This is the disbursement-related activity being sent to or received by COD.

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Field or Control	Description
Description	Displays the description of the action. Values are: *Accepted Orig* *Rejected Orig* *Accepted Orig/Credit Chk PLUS only* *Acpt Orig/Credit Chk Denied PLUS only* *Loan Originated* *Lower Endr* *Orig Change* *Manually Accepted* *Manually Rejected* *Rejected* *Orig not Proc, Rejected Doc* *Change not Proc, Rejected Doc* *Disb not Proc, Rejected Doc* **Note:** Regarding the *Orig not Proc, Rejected Doc*, *Change not Proc, Rejected Doc*, and *Disb not Proc, Rejected Doc* Actions: If the system receives a file whose entire document was rejected, instead of placing all impacted loans contained in the Rejected Document XML on Hold, the system resets the loan to its previous Loan Processing Status prior to the loan being transmitted to COD (for example, Orig Pending, Change Pending, or Disb Pending). This way, when you are able to identify and resolve the offending students in the Rejected Document, you can run the corresponding Outbound processes for inclusion in the transmission.
Action Status	Displays the current status of the action. Values are: *Accepted* *Ac-NtApld* (accepted-not applied) *Authorized* *Failed* *Invalid* *Pending* *Received* *Rejected* *Transmitted* The action status for an acknowledgement is always *Received.* If the COD rejects an origination or origination change record, the system creates a new *Loan Originated* row to track the re-submission of the failed/rejected action.

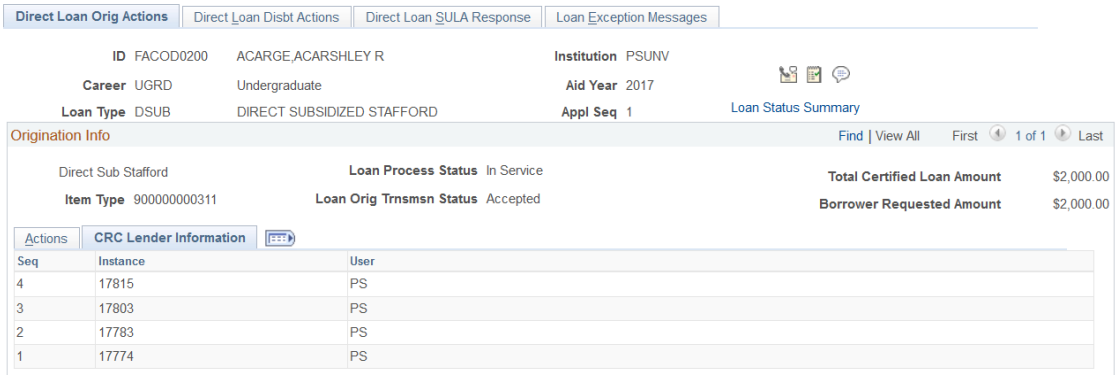
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Field or Control	Description
Msg (message)	**Note:** This column with no header only appears where there is a message to view for the action. Click this hyperlink to view: • Change transactions being generated to COD, • Origination or Origination Change Validation errors. • Origination or Origination Change Response Error Codes.
Status Date	For actions representing received information, the action status date is the COD acknowledgement date. For actions representing transmitted information, this date is the date the action is created.
Loan Action Dttm (loan action date/time)	For actions representing received information, the action date time field displays the date and time the acknowledgement is loaded to the system. For actions representing sent information, this field displays the date and time the transmission was sent.

CRC Lender Information Tab

Select the CRC Lender Information tab.

This example illustrates the fields and controls on the Direct Loan Orig Actions page: CRC Lender Information tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Instance	Displays the unique identifier assigned to the particular process that created the action row.
User	Displays the user ID for the individual who processed the action.

Explaining Direct Loan Origination Status and Action Codes

This section provides an explanation of the Direct Lending Status Codes for origination. This includes the processes run and the actions that generate each status code. The fields referenced in the following table display on the Direct Loan Orig Actions page.

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Loan Processing Status	Loan Origination Transmission Status	Loan Origination Action	Loan Origination Action Status	Status/Action Explanation
Orig Pend	Orig Pend	Loan Originated	Pending	You have not transmitted the loan to the COD. Any changes that you make to the source data are applied to the loan record by the loan adjustments. The system does not create a change transaction.
In Service	Trans	Loan Originated	Transmitted	You have run the Direct Loan Outbound process and sent the loan origination or loan origination change records to the COD. The system suspends Loan Origination Change Processing until you receive the acknowledgement from the COD. The system updates the action status.
In Service	Accepted	Accepted Orig, Accepted Orig/ Credit Chk, Acpt Orig/Crdt Chk Denied, or Acpt Orig/Crdt Chk Pending	Received	You received an origination acknowledgement and the COD accepted the loan origination. The system inserts a new origination action. If you change the origination data, the system generates an origination change record.

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Loan Processing Status	Loan Origination Transmission Status	Loan Origination Action	Loan Origination Action Status	Status/Action Explanation
Hold	Orig Pend	Rejected Orig	Received	You received an origination acknowledgement from the COD and ran COD Inbound. The COD rejected the origination. The system inserts two new actions (Rejected Orig and Loan Originated).
Hold	Orig Pend	Loan Originated	Pending	As a result of the previous action, the system inserts a new loan origination action to resubmit the origination.
Terminated	Origination Pending			The award was cancelled/ declined before transmitting the loan origination to the COD.

Explaining Direct Loan Origination Change Status and Action Codes

This section provides an explanation of the Direct Lending Status Codes for Origination Change. This includes the processes run and the actions that generate each status code. The fields referenced in the following table display on the Direct Loan Orig Actions page.

Loan Processing Status	Loan Origination Transmission Status	Loan Origination Action	Loan Origination Action Status	Status/Action Explanation
In Service	Change Pend	Orig Change	Pending	You changed origination data after the COD accepted the origination; therefore, the Loan Adjustment process created an origination change record. The Origination program inserts a new origination action.

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Loan Processing Status	Loan Origination Transmission Status	Loan Origination Action	Loan Origination Action Status	Status/Action Explanation
In Service	Transmitted	Orig Change	Transmitted	You have transmitted an origination change and the origination program inserts a new origination action.
In Service	Accepted	Orig Change	Accepted	You received an origination acknowledgment from the COD and the origination change is accepted. The Origination program inserts a new origination action.
In Service	Accepted	Orig Change	Accepted Lower Endr	Lower Endr – You sent a loan application based on a Credit Override of – Accept Endorser with an Endorser amount lower than the original loan award amount. You received an origination acknowledgement, and COD accepted the updated loan origination. The system inserts this row of data *and* a Accepted Origination Change row. Therefore, two loan action rows are inserted when a response to Lower Award amount is loaded. This is done to show that the award amount was reduced as a result of lower Endorser amount.

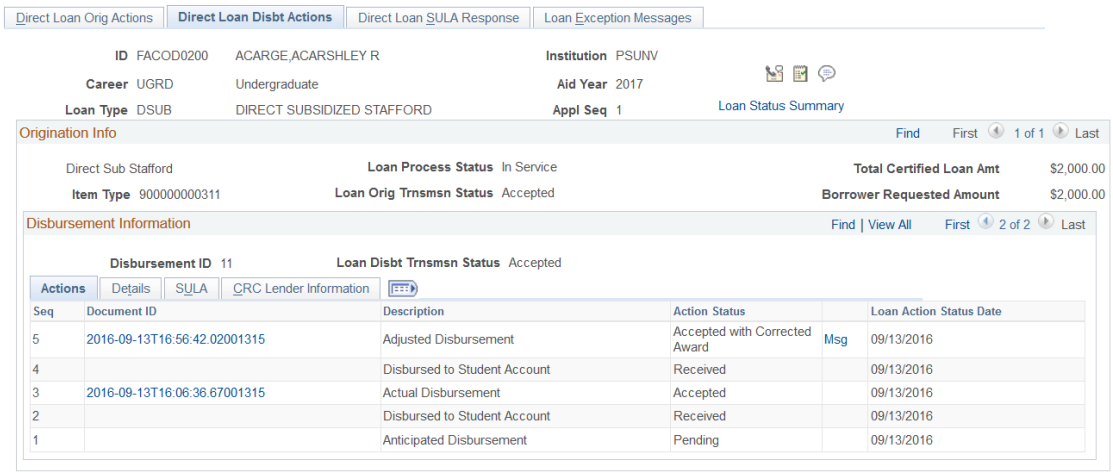
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Loan Processing Status	Loan Origination Transmission Status	Loan Origination Action	Loan Origination Action Status	Status/Action Explanation
Hold	Error	Orig change	Rejected	You received an origination change acknowledgement from the COD that rejects the origination change. The Origination program inserts a new origination action.

Reviewing Direct Loan Disbursement Actions

Access the Direct Loan Disbt Actions page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Disbt Actions**).

This example illustrates the fields and controls on the Direct Loan Disbt Actions page. You can find definitions for the fields and controls later on this page.



The item type, status, and amount fields are the same as those on the Direct Loan Orig Actions page.

Field or Control	Description
Disbursement ID	Displays the ID number assigned to this particular disbursement.

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Field or Control	Description
Loan Disb Trans Stat (loan disbursement transaction status)	Indicates the status for this disbursement. Values are: • Accepted • Actual (actual disbursement) • Chg Pend (change pending) • Disb Pend (disbursement pending) • Error • Trans (transmitted)

Actions Tab

Field or Control	Description
Seq (sequence)	Displays the disbursement action sequence generated from the loan record activity. When multiple sequences exist for a loan, the most recent sequence appears at the top.
Document ID	Click this hyperlink to the View COD Data component which represents the COD Staging Table results. **Note:** This is the data that gets sent to COD.
Description	Displays the description of the disbursement action type. The values are: • Adjusted Disbursement • Canceled Disbursement • Actual Disbursement • Booking Disbursement • Booking Adjustment • Anticipated Disbursement • Servicer Refund • Disbursed to Student Account
Action Status	Displays the current status of the disbursement action. The values are: • Accepted • Ac-NtApld (accepted-not applied) • Accepted with Corrected Award • Authorized • Failed • Invalid • Pending • Received • Rejected • Transmitted The action status for an Acknowledgement is always *Received.*
Msg (message)	**Note:** This column with no header only appears where there is a message to view for the action. Click this hyperlink to view: • Disbursement-level Validation errors, • Disbursement Response Error Codes.

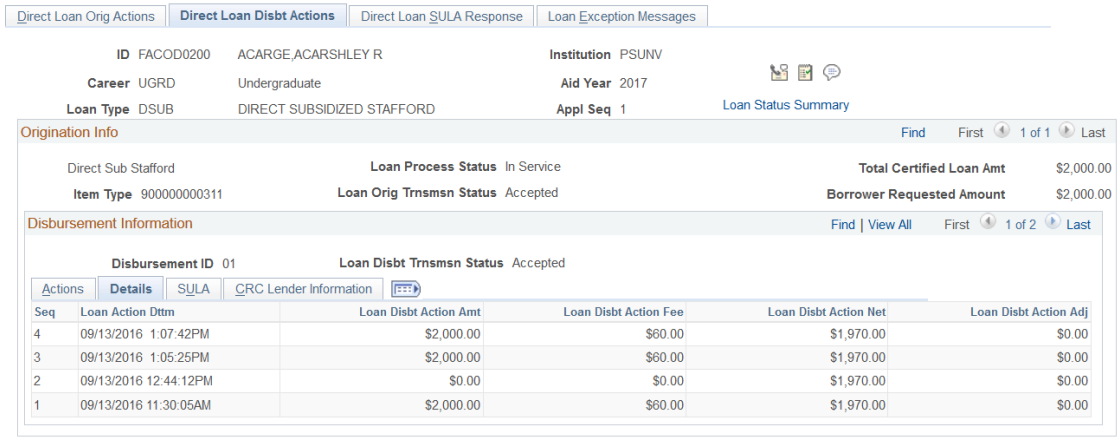
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Field or Control	Description
Loan Action Status Date	For actions representing received information, displays the COD acknowledgement date. For actions representing transmitted information, this is the date the action is created.

Details Tab

Select the Details tab.

This example illustrates the fields and controls on the Direct Loan Disbt Actions page: Details tab. You can find definitions for the fields and controls later on this page.



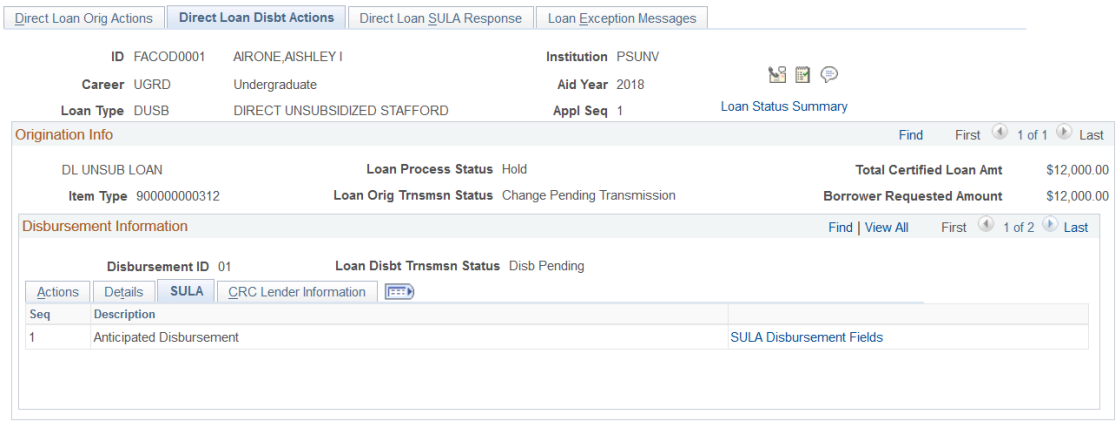
Field or Control	Description
Loan Action Dttm (loan action date/time)	For actions representing received information, the action date time is the date/time the acknowledgement is loaded to the system. For actions representing sent information, this is the date and time the transmission is sent.
Loan Disb Action Amt (loan disbursement action amount)	Displays the gross disbursement amount.
Loan Disb Action Fee (loan disbursement action fee)	Displays the loan fee amount for the disbursement.
Loan Disb Action Net (loan disbursement action net)	Displays the net disbursement amount, minus fees, plus rebate.
Loan Disb Action Adj (loan disbursement action adjustment)	Displays the adjusted disbursement amount reported.

SULA Tab

Select the SULA tab.

This example illustrates the fields and controls on the Direct Loan Disbt Actions page: SULA tab. You can find definitions for the fields and controls later on this page.

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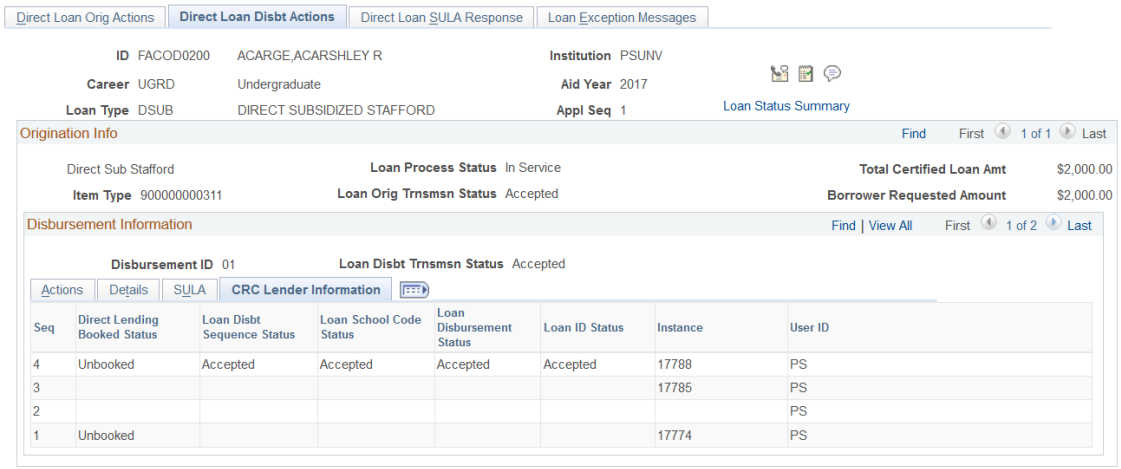


Field or Control	Description
SULA Disbursement Fields (subsidized usage limit applied disbursement fields)	Click this link to view the SULA disbursement field details.

CRC Lender Information Tab

Select the CRC Lender Information tab.

This example illustrates the fields and controls on the Direct Loan Disbt Actions page: CRC Lender Information tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Direct Lending Booked Status	Displays *Booked* if the COD has accepted and acknowledged the origination, first disbursement, and promissory notes. Until this occurs, the status is *Unbooked.*
Loan Disb Sequence Status (loan disbursement sequence status)	Displays one of the following values: *Accepted* *Invalid* (invalid sequence number) *AlrdyRecv* (already received)

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Field or Control	Description
Loan School Cd Status (loan school code status)	Displays one of the following values: *blank* if the school code is accepted and *I - Invalid* if the school code is invalid.
Loan Disbursement Status	Displays one of the following values: *Accepted* *Invalid* (invalid disbursement) *AlrdyRecv* (already received) *Reject*
Loan ID Status	Displays one of the following values: *I - Invalid Loan Identifier* *N - Loan Identifier Not on File* *blank - Accepted*
Instance	Displays the number used by the system to count the occurrences of the processes you run. Use this on the Messages page to select the particular instance of the process.
User ID	Displays the user ID for the individual who processed the action.

Explaining Direct Loan Disbursement Status and Action Codes

This section provides an explanation of the Direct Lending Status Codes for disbursements. This includes the processes run and actions that generate each status code. The fields referenced in the following table are located on the Direct Loan Disbt Actions page.

The **Loan Disbursement Transaction Status** field appears opposite the Disbursement ID. The loan disbursement action status refers to the **Action Status** field on the page.

Loan Disbursement Transmission Status	Loan Disbursement Action	Loan Disbursement Action Status	Status/Action Explanation
Disb Pend	Anticipated Disbursement	Pending	You originated the loan. This record represents the anticipated disbursement data at the time of disbursement. The Origination program inserts a new disbursement action row.
Disb Pend	Disbursed to Student Account	Received	You authorized and disbursed funds to the students account. The Disbursement program inserts a new disbursement action row.
Transmitted	Actual Disbursement	Transmitted	You transmitted an actual disbursement record to the COD. The Disbursement Outbound program inserts a new disbursement action.

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Loan Disbursement Transmission Status	Loan Disbursement Action	Loan Disbursement Action Status	Status/Action Explanation
Accepted	Actual Disbursement	Accepted	You received a disbursement acknowledgement from the COD that indicates the disbursement was accepted. The Disbursement Inbound program updates the disbursement action.
Error	Actual Disbursement	Rejected	You received a disbursement acknowledgement from the COD indicating the disbursement was rejected. The Disbursement program updates the disbursement action.
Transmitted	Adjusted Disbursement	Transmitted	You transmitted an adjusted disbursement record to the COD. The Disbursement Outbound program inserts a new disbursement action.
Accepted	Adjusted Disbursement	Accepted	You received a disbursement acknowledgement from the COD indicating the disbursement adjustment was accepted. The Disbursement Inbound program updates the disbursement action.
Error	Adjusted Disbursement	Rejected	You received a disbursement acknowledgement from COD indicating the disbursement adjustment was rejected. The disbursement program updates the disbursement action.
Accepted	Booking Disbursement	Accepted	You received a booking notification from COD. The booking notification indicates that the loan origination, promissory note and the first actual disbursement are accepted. The booking notification includes the Disbursement Activity Type L booking disbursement, the booked date and COD's total net booked amount.
Accepted	Booking Adjustment	Accepted	For each disbursement adjustment acknowledgement you receive from COD, you also receive a booking notification. The booking notification includes the Disbursement Activity Type M booking adjustment, booked date and COD's total net booked amount.
Accepted	Servicer Refund	Accepted	You received a servicer refund acknowledgement from COD.

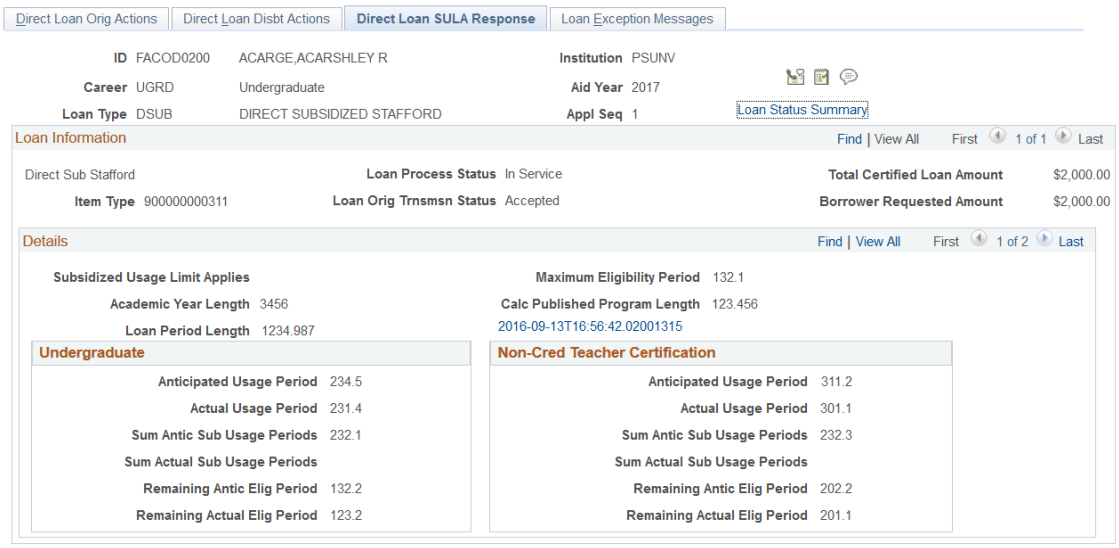
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Loan Disbursement Transmission Status	Loan Disbursement Action	Loan Disbursement Action Status	Status/Action Explanation
Accepted	Adjusted Disbursement	Accepted with Corrected Award	You received a disbursement acknowledgement from COD with Response Error Code 219 indicating that the student's award amount has been adjusted downward by COD to equal the sum of the actual and anticipated disbursements. Look for these values in the Response file: • ResponseCode tag = *C* • EditProcessResult tag = *219* • ResponseErrorField tag = *FinancialAwardAmount* • ResponseErrorValue tag = COD-corrected loan amount

Reviewing Direct Loan SULA Response

Access the Loan Exception Messages page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan SULA Response**).

This illustrates the Direct Loan SULA Response page.



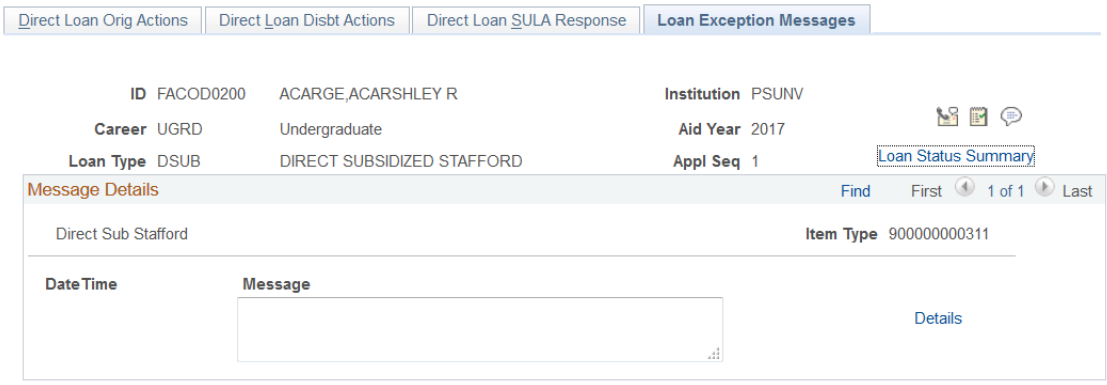
For Subsidized Usage Limit Applies (SULA) rules, COD calculates a borrower's Subsidized Usage for two categories of usage: *Undergraduate Subsidized Usage* and *Non-Credential Teacher Certification Usage*. Depending upon whether the Special Programs tag equals T (Non-Credential Teacher Certification), one or both of these categories may be populated with duration, consumption, and remaining eligibility values. Also displayed is either anticipated and/or actual values, depending upon whether at least one actual disbursement has taken place (driven by Disbursement Release Indicator equaling true or false).

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Reviewing Loan Exception Messages

Access the Loan Exception Messages page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Loan Exception Messages**).

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



Field or Control	Description
DateTime	Displays the date and time that the message was created.
Message	Displays the exception message logged for each transaction listed. You can enter further information regarding the exception message using the Loan Message Comment page.
Details	Click this link to view additional message information.

Updating Loan Dates

This section discusses updating Loan Period Start, Loan Period End, Academic Year Start and Academic Year End dates for CommonLine & Direct loans.

Page Used to Update Loan Dates

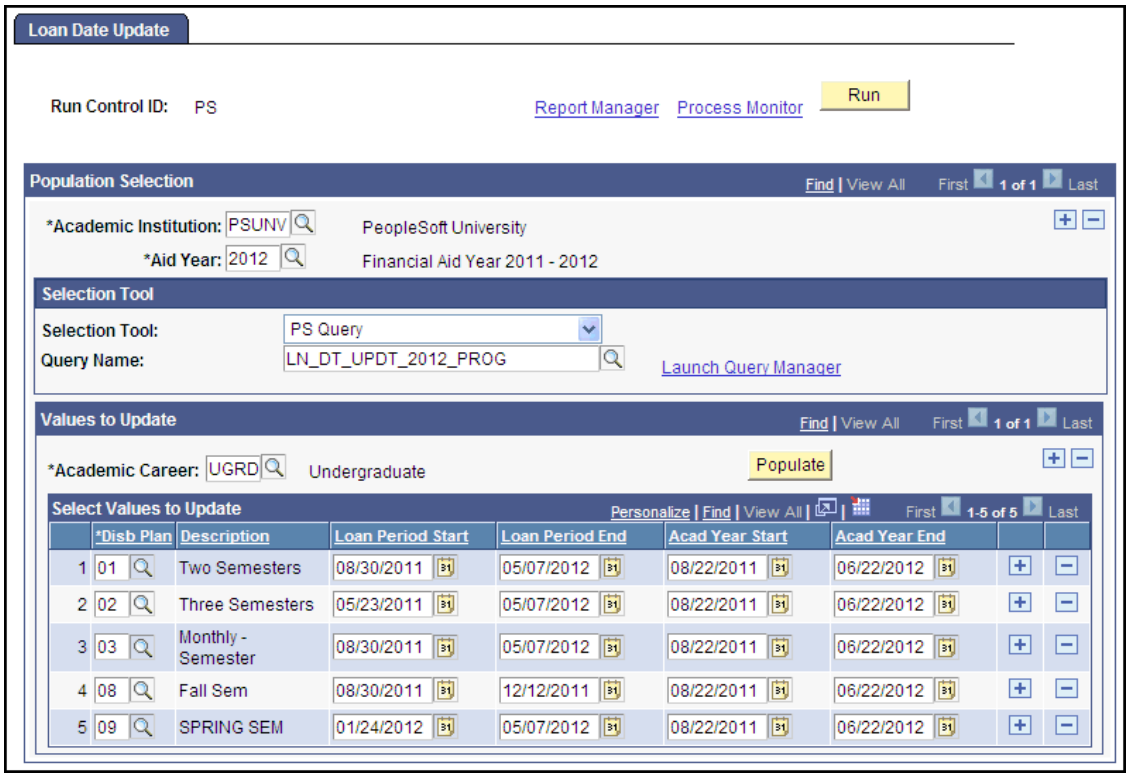
Page Name	Definition Name	Navigation	Usage
Loan Date Update	SFA_LNUPD_PG	Financial Aid, Loans, Process Loan Dates	Update Loan Period Start, Loan Period End, Academic Year Start and Academic Year End dates for CommonLine & Direct loans.

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Updating Loan Dates

Access the Loan Date Update page (**Financial Aid**, and then **Loans**, and then **Process Loan Dates**).

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



Use the Loan Date Update process to update Loan Period Start, Loan Period End, Academic Year Start and Academic Year End dates for CommonLine & Direct loans.

> **Note**
>
> This process only allows dates to be updated for eligible loan records. Since this process does not create change transactions, eligible loan records are those having a Loan Process Status of O (Origination Pending and a Transmission Status of O (Origination Pending Transmission). Oracle recommends running this process immediately after Loan Origination and/or just prior to the Loan Outbound process.

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Field or Control	Description
Query Name	Displays only when PS Query is selected in the Selection Tool field. Select a PS Query that uses the SFA_LNUPD_BND bind record. For updates to take place the first seven fields on the SFA_LNUPD_BND record **must** be selected in the query: • EMPLID • INSTITUTION • AID_YEAR • ACAD_CAREER • DISBURSEMENT_PLAN • LOAN_TYPE • LN_APPL_SEQ The other four fields in the SFA_LNUPD_BND are optional: • LN_PERIOD_START • LN_PERIOD_END • ACAD_YEAR_START • ACAD_YEAR_END
Equation Name	Select an equation that is defined with the application prompt Loan Date Update.
Populate	Click this button to automatically populate the grid with ALL valid Disbursement Plans and Dates based on the Academic Institution, Aid Year, and Academic Career combination. These are the default dates based on setup, you can then delete/modify rows as needed.
Disb Plan (disbursement plan)	Enter valid Disbursement Plans based on the Academic Institution, Aid Year, and Academic Career combination.

For the Date Fields (Loan Period Start, Loan Period End, Acad Year Start, and Acad Year End), enter the date value you want to be updated on the student's loan record for the Academic Institution, Aid Year, Academic Career, and Disb Plan combination.

> **Note**
>
> If a Date Field is left blank, no update is made for that Academic Institution, Aid Year, Academic Career, Disb Plan, and Date combination. In other words, the date that currently exists on the student's loan record remains.

If a Date field is updated during this process, the associated Override field is marked as "Y".

Loan Date Field	Override Field
Loan Period Start/Loan Period End	Loan Period Override (LN_PERIOD_OVRD)
Academic Year Start	Academic Year Start Override (LN_ACAD_ST_OVRD)
Academic Year End	Academic Year End Override (LN_ACAD_END_OVRD)

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Related Topics

- Campus Community Fundamentals: Using the Population Selection Process

Creating and Using Promissory Notes

Multi-year Master Promissory Notes allow a student to sign and use one promissory note throughout multiple loan years and for multiple schools participating in the multi-year master promissory notes.

All existing 1999-2000 and 2000-2001 master promissory notes, are treated as multi-year promissory notes. Schools that are eligible for multi-year promissory note functionality can use these existing master promissory notes for 2001-2002 loans for the same student. Borrowers who attend a school that is eligible for multi-year functionality are required to have only one master promissory note on file at the COD for all subsidized and unsubsidized loans disbursed for the academic year 2000-2001 and forward. An open master promissory note on file at the COD is assigned to the borrower and can be used by any school eligible for multi-year functionality.

> **Note**
>
> The Social Security Number, date of birth, and first name on the Loan Origination Record must match the same values on the master promissory note, otherwise the COD cannot link the existing master promissory note to the Loan Origination Record.

An open master promissory note is valid for up to ten years from the date of the first anticipated disbursement, if an actual disbursement is made. Students can close open master promissory notes by calling a customer service representative at the COD. After a master promissory note is closed, no new loans can be disbursed without generating a new master promissory note. However, all disbursements and booking activity for the loans already attached to the closed master promissory notes are processed.

Single-year schools are not eligible to use multi-year master promissory notes. For these schools, a borrower must sign a new master promissory note for each academic year. Single-year schools must use a master promissory note generated specifically for that institution. For these schools, subsidized and unsubsidized loans for the same student and the same academic year can be linked to a single master promissory note.

This section discusses how to:

- Create a promissory note communication record.
- Print direct loan master promissory notes.
- Sign and review direct loan promissory notes.
- Create batch signatures for DL promissory notes.

You use the same pages whether you are creating multi-year promissory notes or single year promissory notes.

For more information regarding the use of the Electronic Master Promissory Note and alternative print options to allow COD to print and communicate with borrowers regarding promissory note requirements,

For more information, see U.S. Department of Education's Common Origination and Disbursement (COD) Technical Reference.

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Pages Used to Create and Use Promissory Notes

Page Name	Definition Name	Navigation	Usage
Create DL PNote Communication (create direct loan promissory note communication)	RUNCTL_DLPN02	**Financial Aid**, and then **Loans**, and then **Create PNote Communication**, and then **Create DL PNote Communication**	Create promissory note communication records for the types of documents defined in the report package selected. The print process that produces the output for the promissory notes reads the communication record.
Print DL Promissory Note (print direct loan promissory note)	RUNCTL_DL_PN_PRT02	**Financial Aid**, and then **Loans**, and then **Print Promissory Note**, and then **Print DL Promissory Note**	Print promissory notes for direct lending.
Direct Loan Pnote (direct loan promissory note)	LN_DL_PNOTE	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Review Promissory Note Actions**, and then **Direct Loan PNote**	For an originated loan, indicate when a promissory note has been signed, adjust the status of the promissory note for the loan manifest, reprint the promissory note, create another promissory note, and cancel the promissory note.
DL Batch Signature (direct loan batch signature)	DL_BTCH_PNT	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Create Signatures in Batch**, and then **DL Batch Signature**	Record promissory note signatures in batch mode and remove signatures in batch. To record promissory note signatures, select the promissory note IDs and apply the signatures. You can sign a group of promissory notes or individual promissory notes. You can remove the signature from a promissory note.
Loan PNote Selection Criteria (loan promissory note selection criteria)	LN_DL_PNOTE_SLCT	Click the **Batch PNote Selection** button from the DL Batch Signature page.	Enter criteria to be used to select the promissory notes to sign or un-sign.

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Creating a Promissory Note Communication Record

Access the Create DL Pnote Communication page (**Financial Aid**, and then **Loans**, and then **Create PNote Communication**, and then **Create DL PNote Communication**).

Use this page to run the Create PNote Communication Rec process (FAPLDPN2). You can create direct lending (and non-Direct Lending) promissory note communication records that determine which promissory notes are printed, based on the criteria you enter. The fields in the **Selection Criteria** group box have a cumulative search effect. Each field that you enter narrows your search criteria.

The DL PNote Create program (FAPLDPN2.CBL) creates one VAR_DATA_LOAN record if it is assigning a Checklist and Communication at the same time and ensures consistent VAR_DATA_LOAN data. When you run the Loan Origination and the DL Pnote Create (FAPLDPN2.CBL) processes, the system populates the fields to be in sync. This accommodates users who run the CCLTRGEN routines. For loans other than direct loans, the system populates all fields except for LN_APPL_ID. As a result, the system only creates one VAR_DATA_LOAN record when the loan origination process is run along with the CCLTRGEN routine.

Selection Criteria

Select the institution, aid year, and academic career for which to create a promissory note communication record for loans originated for that group of students.

Field or Control	Description
Ln Output Type (loan output type)	Select a value to set the output format for your documents from *Delimited, External, Fixed,* and *Positional.* For direct lending, the system supports *External* (for institutions that use third-party software to generate documents) and *Positional* values.
Report Package	Specify your report package based on how you set up the Loan Report Packages page. The system evaluates the report package and assigns communications to any loan types the student may have that correspond to the document types defined in the package.

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Field or Control	Description
Document Type	Select from: *Hlth Pnote* *Mstr Pnote:* The system generates communications only for Subsidized Stafford or Unsubsidized Stafford loan types. *PNote:* The system generates communications for PLUS and Graduate PLUS loans. *Perk PNote* *Univ Pnote* All document types are linked to the loan category and loan program from the Loan Type Table. If you leave this field blank, the system assigns communications to any loan types that the student has that correspond to the document types defined in the report package. If you enter a value, the system assigns communications only to the loan type that matches the selected document type. For example, if *Pnote* is selected, the system generates communications only for PLUS loans.

> **Note**
>
> Although *Cover Ltr, TIL,* and *TIS* are listed, they are not valid selections for **Document Type** for this process.

Field or Control	Description
Print Option	Select which promissory notes to print. Values are: *Blank:* This option prints promissory notes for all loan types that have not had a promissory note printed. *New:* This option is similar to the *Blank* option processing promissory notes for all loan types, except when processing direct lending subsidized and unsubsidized loans. The *New* option only creates a master promissory note communication for students who do not have an accepted loan origination in a previous year and who do not have a MPN on file with the COD. *P Stat:* This option prints all promissory notes that the COD origination acknowledgment file has flagged to print.
From Date and **Thru Date**	Select a range of dates. The system generates communications for loans with origination dates that start with the **From Date** and end with the **Thru Date.**

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Field or Control	Description
Student Override	Select this check box to allow you to print a promissory note for specific students. If an existing promissory note is lost, use this method to create new communications.
ID	Select an ID for the students requiring their promissory note to be printed. Add a new row for each student for whom you want to create a promissory note communication.

> **Note**
>
> After you run the Create DL PNote Comm process once with the document type blank, you can create additional promissory notes and promissory note communications by running the process using singular document types or using the **From Date** and **Thru Date.** Otherwise, the communication continues to select all the promissory note types and populating the promissory note communication table with multiple rows.

Check the Batch Message Inquiry page in this component after you run the process to be sure it completed correctly.

Printing Direct Loan Master Promissory Notes

Access the Print DL Promissory Note page (**Financial Aid**, and then **Loans**, and then **Print Promissory Note**, and then **Print DL Promissory Note**).

Use this page to run the Print Packages/PNote Docs process (FALDPNT2).

You can use Master Promissory Notes (MPN) in making Subsidized and Unsubsidized Stafford, PLUS, and Graduate PLUS loans in the Direct Loan (DL) program. One promissory note can be used to make one or more loans to a parent borrower to help pay for the educational costs of one dependent student for one or more academic years.

If your institution collects signed promissory notes for the Direct Lending program, you can produce a manifest to send with the signed promissory notes to the Direct Lending common origination and disbursement processing center (COD).

A loan origination record must exist before you can create a promissory note. Set up your Manage Communication Tables in Campus Community, set up Loan Report Packages and DL Serial Pnote Tables in Process Loans. To print a promissory note, first create a promissory note communication record for the types of documents defined in the report package selected. The print process that produces the output for the promissory notes reads the communication record.

Campus Solutions uses an unlabeled format for printing promissory notes and only supports a positional print process. There is also an extract process.

> **Note**
>
> For details on how to set up a loan origination record, the Manage Communication Table, Loan Report Packages, and DL Serial Pnote Tables:

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See Creating and Using Promissory Notes.

Selection Criteria

The following fields are the same as those on the Create DL PNote Comm page: **Institution, Aid Year, Career, Ln Output Type, Student Override,** and **ID.**

Field or Control	Description
Ln Output Type (loan output type)	Select *Positional.* For Subsidized and Unsubsidized Stafford promissory notes, the system prints for unlabeled forms. For PLUS promissory notes, the system prints for labeled forms.
Report Package	Select *Positional.*
Document Type	If you leave this field blank, the system generates output for each type of document defined in the report package that has an unprocessed communication record. If a cover letter or truth-in-lending document(s) is defined in the package they are also produced. If you enter a value, the system generates output only for the document type selected (where an unprocessed communication record exists). If you select *Mstr Pnote,* the system generates output only for Subsidized and Unsubsidized Stafford Promissory Notes. If you select *Pnote,* the system generates output only for PLUS Promissory Notes.
From Date and **Thru Date**	Select the range of dates for the promissory note/package print process. The system processes communication records with dates that start with the date you enter in the **From Date** field and end with the date you enter in the **Thru Date** field. If you select the **Student Override** check box, the date fields do not appear.
Number of Copies	Enter the number of promissory notes to print.

> **Note**
>
> The system manages positional printing differently. When you run the process to create the communication record, the system processes all loan types associated with the package. It creates all of the communication records. If you are using positional printing, you can only print one document at a time. When you select the package you want to use, you must also specify which document type you want to run.

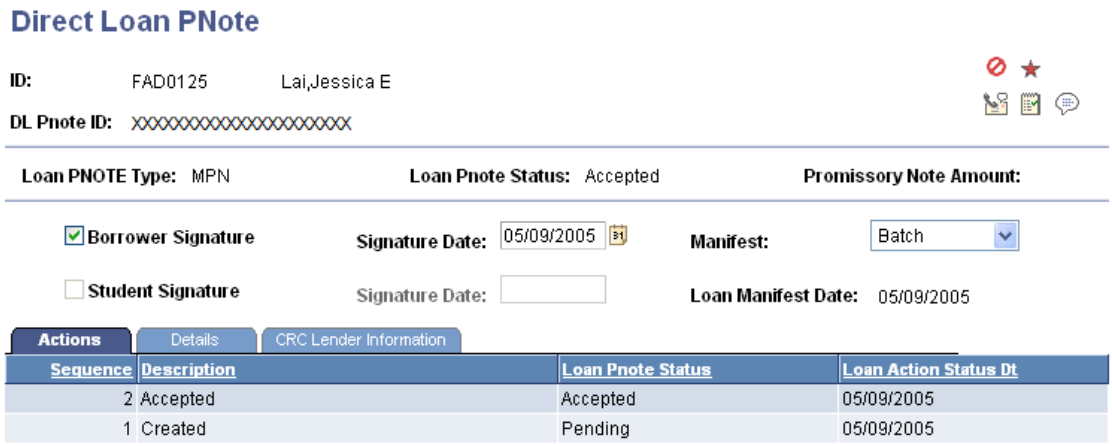
Signing and Reviewing Direct Loan Promissory Notes

Access the Direct Loan PNote page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Review Promissory Note Actions**, and then **Direct Loan PNote**).

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> **Note**
>
> The Direct Loan Pnote page can only be accessed if a Promissory Note Acknowledgement file is imported or if the school internally creates promissory notes to manage.

This example illustrates the fields and controls on the Direct Loan PNote page: Actions tab. You can find definitions for the fields and controls later on this page.



> **Note**
>
> Select the tabs on the page to access multiple views of this page. Fields common to all views are documented first.

Common Page Information

Field or Control	Description
DL Pnote ID	Beginning with 2003-2004, direct loan application processing supports master promissory note requirements for the PLUS loan types. The system adds the letter N to the ID to indicate that the loan is PLUS Loan MPN. The system adds the letter M to indicate that the loan is a Stafford (subsidized or unsubsidized) Loan MPN.
Loan PNOTE Type (loan promissory note type)	Displays the type of promissory note used for this loan.

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Field or Control	Description
Loan PNote Status (loan promissory note status)	Displays the current status of the loan promissory note. • *Ack Pending*(acknowledgement pending) – Status is set when the Promissory Note is created by the system. • *Accepted* – Status is set when acknowledgment is received from COD and processed by the system. • *Rejected* – Status is set when acknowledgment is received from COD and processed by the system. • *Closed* – Status is set when acknowledgment is received from COD and processed by the system. No additional loan awards can be associated with this promissory note, but disbursement and booking processing may continue with COD. • *Endorser* – Value represents the MPN Status as reported by COD on either the origination or promissory note acknowledgement files. This status is used beginning with the 2012–2013 aid year. • *Inactive* – Status is set when acknowledgment is received from COD and processed by the system. No additional loan awards can be associated with this promissory note, but disbursement and booking processing may continue with COD. **Note:** *Closed, Endorser,* and *Inactive* MPN values are reported by COD. For disbursement purposes, the system treats *Closed, Endorser,* and *Inactive* MPNs as an *Accepted* MPN. For more information regarding how COD processes MPN's: See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference*
Promissory Note Amount	Displays the amount of the promissory note.
Borrower Signature	Select this check box when the borrower has signed the promissory note. For a PLUS loan, the borrower is the parent or guardian. The system makes the **Student Signature** field unavailable.

> **Note**
>
> The Checklist associated with the loan type is inserted when the Promissory note Communication is assigned. In previous versions of Financial Aid, the Checklist associated with the loan was inserted at loan origination. Make sure you have assigned a 3Cs inquiry group to your communication category.

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Field or Control	Description
Student Signature	Select this check box when the student has signed the promissory note. The student signature is unavailable on the promissory note for PLUS loans only.
Signature Date	Displays today's date. You can edit the field if needed.
Manifest	Select the status of this promissory note in regards to the Loan Manifest. Use this check box when your institution collects signed promissory notes and sends them with a manifest to a loan service provider or the direct lending common origination and disbursement processing center (COD). The values are: *Authorize:* Indicates that the signature check boxes are selected. *Batch:* Indicates that the Manifest Generation process is complete. *Pending:* Indicates that the loan is originated.

Actions Tab

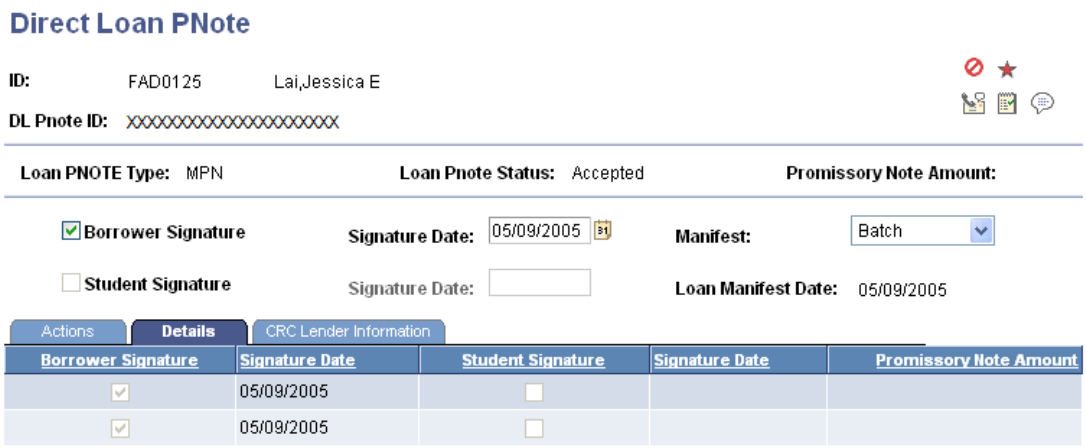
Field or Control	Description
Sequence	Displays the promissory note action sequence generated from the loan record activity. When multiple sequences exist for a promissory note, they display in reverse chronological order.
Description	Displays a description for the displayed action code.
Loan Pnote Status (loan promissory note status)	Displays the current status of the promissory note. Values are *Accepted*, *Pending*, and *Rejected*.
Loan Action Status Dt (loan action status date)	Indicates the date when the loan action status activity occurred.

Details Tab

Select the Details tab.

This example illustrates the fields and controls on the Direct Loan PNote page: Details tab. You can find definitions for the fields and controls later on this page.

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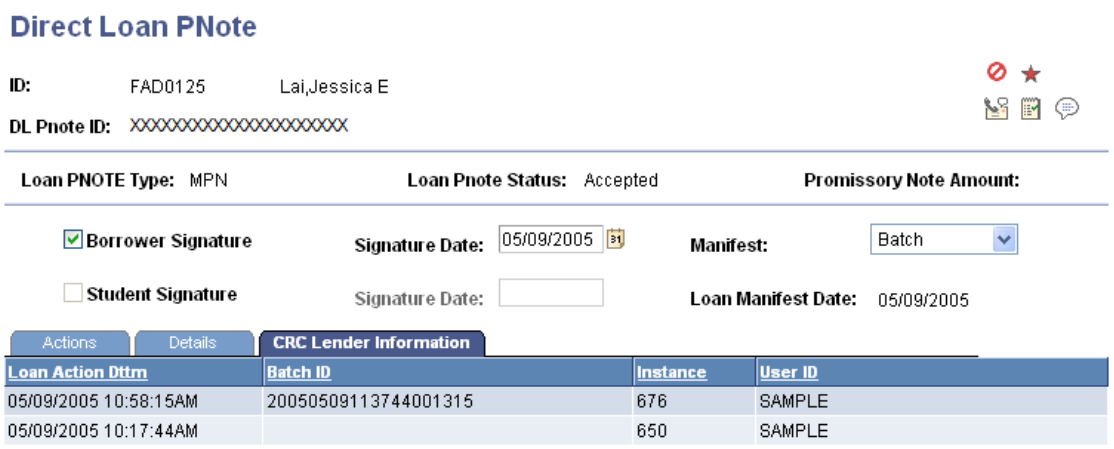
Field or Control	Description
Borrower Signature	Indicates whether the borrower has signed the promissory note.
Signature Date	Displays the date that the **Borrower Signature** check box was selected, or the actual date the borrower signed the promissory note if you edited the signature date.
Student Signature	This field is unavailable with PLUS loans when the borrower is not the student.
Signature Date	Displays the date that the **Student Signature** check box is selected, or the actual date the student signed the promissory note if you edited the signature date.
Promissory Note Amount	Displays the amount printed on the promissory note.

CRC Lender Information Tab

Select the CRC Lender Information tab.

This example illustrates the fields and controls on the Direct Loan PNote page: CRC Lender Information tab. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Loan Action Dttm (loan action date and time)	Displays the date and time the loan promissory note status was posted.
Batch ID	Displays the direct lending batch ID.
Instance	Displays the number that the system assigns incrementally to count the occurrences of the processes you run. You can use this number to select the particular instance of the process for which you want to view the process results.
User ID	Displays the ID of the person who ran the process.

Creating Batch Signatures for DL Promissory Notes

Access the DL Batch Signature page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Create Signatures in Batch**, and then **DL Batch Signature**).

Use this page to sort based on aid year by selecting it on the Selection Criteria page.

> **Note**
>
> This page is designed to select a cumulative list of outstanding unsigned promissory notes. To select the promissory notes to be signed, review the aid year designation in the DL Pnote ID. The two-digit aid year designation is located after the Borrower's Social Security Number and the *M* for a Stafford loan and the *P* for a PLUS.

Field or Control	Description
Description	Enter a description for the current batch of signatures that you are creating.
Batch Pnote Action (batch promissory note action)	Choose the *Select* option to specify the promissory notes to sign.

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Field or Control	Description
Batch PNote Selection (batch promissory note selection)	Click this link to access the Loan Pnote Selection Criteria page, where you can specify which promissory notes to sign. Click the **lightening bolt** to activate the selection.

The group box contains the promissory note ID numbers and names of the students you selected.

Field or Control	Description
DL PNote ID (direct lending promissory note ID)	Select the unique ID assigned to the promissory note.
Name	Displays the borrower name that is on the promissory note.
PNote Status	Displays the current status of the promissory note. Values are *Accepted, Pending,* and *Rejected.*
PNote Type	Specifies the type of promissory note. It displays either *MPN* for Stafford loans or *PNOTE* for PLUS loans.
Borrower Signature	Select this check box to indicate that the borrower signed the promissory note. The system automatically selects this check box when you sign a batch of promissory notes. Clearing the check box indicates that the borrower has not signed the promissory note. Use the date field to enter the date that the borrower signed the promissory note.
Student Signature	This check box is active for PLUS PNOTE types only.

The field that displays to the right of the student signature date field contains the status of the manifest. When you sign the promissory note, the status changes to *Authorize.* Prior to signing the promissory notes, the status is *Pending.* After the manifest generation process is complete, the status is *Batch.*

Signing or Un-signing a Group of Promissory Notes

To sign the entire group of promissory notes:

1. Select the *Sign* option in the **Batch PNote Action** field.
2. Click the lightening bolt to select all the active signature check boxes. For PLUS notes, both the **Borrower Signature** and **Student Signature** check boxes are active.

To un-sign the entire group of promissory notes:

1. Select the *Unsign* option in the **Batch PNote Action** field.
2. Click the lightening bolt to clear all the active signature check boxes.

The group box contains the promissory note ID numbers and names of the students you selected.

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Entering Loan Pnote Selection Criteria

Access the Loan PNote Selection Criteria page (click the **Batch PNote Selection** button from the DL Batch Signature page).

You can select promissory notes by the borrower's name or National ID number. For U.S. citizens this is the social security number. You can also specify whether to select promissory notes of a specific type.

Field or Control	Description
Aid Year	Select the aid year on which to sort the signature records.
Last Name FROM and **Last Name TO**	Use these fields to select a group of students by their last names. Enter the beginning name for the range in the **FROM** field and the ending name in the **TO** field.
National ID FROM and **National ID TO**	Use these fields to select a group of students by their national ID numbers. Enter the beginning national ID number for the range in the **FROM** field and the ending national ID in the **TO** field.
Loan PNOTE Type	Select the type of promissory note to sign. Select *MPN* for Stafford loans or *PNOTE* for PLUS loans. To include both types of promissory notes, select *Both*.

Viewing Promissory Note Action History and Loan Disbursement Messages

This section discusses how to:

- View promissory note action history.
- View loan disbursement messages.

Page Used to View Promissory Note Action History and Loan Disbursement Messages

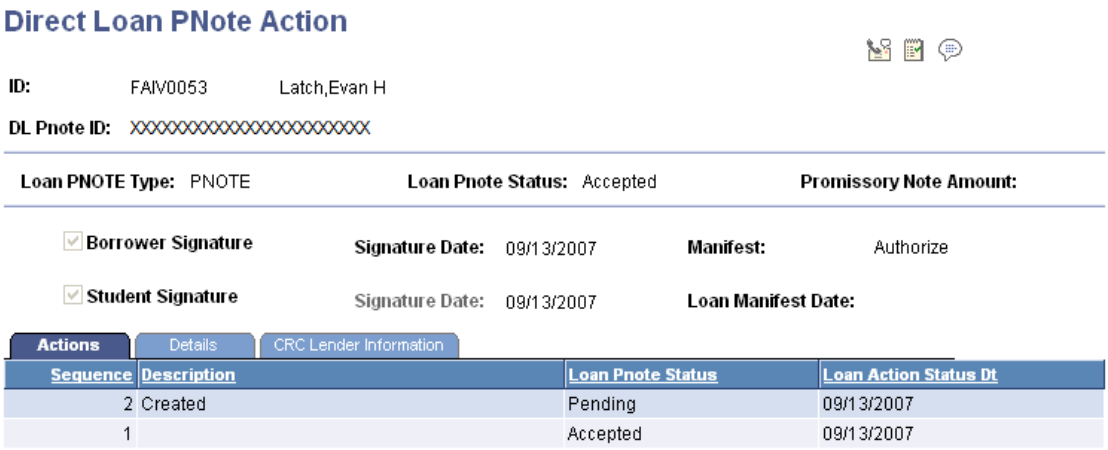
Page Name	Definition Name	Navigation	Usage
Direct Loan PNote Action	LN_DL_PNOTE_INQ	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Promissory Note Actions**, and then **Direct Loan PNote Action**	View promissory note action history. This is information the same information as on the Direct Loan PNote page, but this page cannot be updated. You can also review messages pertaining to rejected transactions.

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Viewing Promissory Note Action History

Access the Direct Loan PNote Action page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Promissory Note Actions**, and then **Direct Loan PNote Action**).

This example illustrates the fields and controls on the Direct Loan PNote Action page. You can find definitions for the fields and controls later on this page.



Actions Tab

Click the **Msg** (message) link to access the Loan Disbursement Messages page, where you can view messages that explain the problem with the promissory note.

Related Topics

- Signing and Reviewing Direct Loan Promissory Notes
  Access the Direct Loan PNote page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Review Promissory Note Actions**, and then **Direct Loan PNote**).

Viewing Loan Disbursement Messages

Access the Loan Disbursement Messages page (click the **Msg** link on the Direct Loan PNote Action page).

Field or Control	Description
PNt MsqSq (promissory note message sequence)	Displays the number generated from the promissory note record activity. Multiple sequences display, with the most recent sequence first.
Msg Code (message code)	Displays the code that the COD has assigned to this action message.
Msg (message)	Click this link to view the full text of the message.
Descr (description)	Displays the description of the action message.

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Processing Direct Loan Manifests

If your institution collects signed promissory notes for the direct lending program, you must produce a manifest to send with the signed promissory notes to the direct lending common origination and disbursement (COD) processing center. When you receive a signed promissory note, access the Direct Loan Pnote page and indicate that the promissory note is signed. The system sets the **Manifest Status** to *Authorize* and the promissory note is included the next time you create a loan manifest.

Next, create the data for the loan manifest by running the Populate Manifest process, which selects all students' promissory notes that have a manifest status of *Authorize.* You can review the selected promissory notes and delete any not to be included in the manifest before printing the manifest.

Then manually sort the signed promissory notes and attach the printed manifest to each group of fifty promissory notes. Financial Aid creates a manifest for every fifty promissory notes. Separate manifests are created for Stafford subsidized and unsubsidized and PLUS promissory notes as required by the COD.

This section discusses how to:

- Create a direct loan manifest.
- Edit a direct loan manifest.
- Print PLUS and Stafford loan manifests.

Pages Used to Process Direct Loan Manifests

Page Name	Definition Name	Navigation	Usage
Populate Manifest	RUNCTL_MANIFEST1	**Financial Aid**, and then **File Management**, and then **Direct Loans**, and then **Generate Direct Loans Manifest**, and then **Populate Manifest**	Select the students whose promissory notes are signed and ready to be added to the loan manifest.
Direct Loan Manifest	LOAN_MANIFEST	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Review Manifest Batches**, and then **Direct Loan Manifest**	View the list of students and their loan IDs that are in each manifest. There are separate manifests for Stafford and PLUS promissory notes. You can remove students that should not be included on the manifest.

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Page Name	Definition Name	Navigation	Usage
DL Print PLUS Manifest	RUNCTL_MANIFEST2	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Print Manifest Report PLUS**, and then **DL Print PLUS Manifest**	Print PLUS loan manifests.
DL Print Stafford Manifest	RUNCTL_MANIFEST3	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Print Manifest Report— Stafford**, and then **DL Print Stafford Manifest**	Print subsidized and unsubsidized Stafford loan manifests.

Creating a Direct Loan Manifest

Access the Populate Manifest page (**Financial Aid**, and then **File Management**, and then **Direct Loans**, and then **Generate Direct Loans Manifest**, and then **Populate Manifest**).

Use this page to run the DL Manifest Generation process for subsidized and unsubsidized loans (FAMANF01). The DL Manifest Generation process for PLUS loans is FAMAN2.

Select the academic institution and aid year of the promissory notes to be included on the manifest.

Editing a Direct Loan Manifest

Access the Direct Loan Manifest page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Review Manifest Batches**, and then **Direct Loan Manifest**).

Field or Control	Description
School Code	Displays the Central Processing Center (CPS)/ FAFSA Processing System (FPS) code for your institution.
Loan Manifest Date	Displays the date you created the manifest.
Manifest Group Number	Indicates each manifest group. A new manifest group is created for each Stafford or PLUS group of fifty promissory notes. You can view the different manifest groups.
DL Batch ID (direct lending batch identifier)	Displays a batch ID comprised of alphanumeric characters representing batch type, cycle year, school code, date, and time. This batch ID is used to monitor and control the number of promissory notes accepted by the Department of Education COD.
Seq Number (sequence number)	Indicates the order that you should organize the signed promissory notes you include with the manifest.

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Field or Control	Description
ID	Displays the student's ID.
Loan ID	Displays the identification number of the loan. The promissory note type is displayed next to this field.
Delete Row	Select this check box to remove a student from the manifest when it is printed. To include the student in future manifests, reset the manifest status to *Authorize* on the Direct Loan PNote page.

Printing PLUS and Stafford Loan Manifests

Different run control pages are available for printing PLUS loan manifests and Stafford loan manifests. Use the Plus Manifest page to print PLUS loan manifests and the Stafford Manifest page to print Stafford loan manifests that you have created. You can print or reprint the manifests by date or by manifest group.

Printing a PLUS Loan Manifest

Access the DL Print PLUS Manifest page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Print Manifest Report PLUS**, and then **DL Print PLUS Manifest**).

Use this page to run the Generate Manifest Report process for subsidized and unsubsidized (FAMANFS3). The process that runs the DL Manifest Generation for PLUS loans is FAMANFS2.

Field or Control	Description
Loan Manifest Date	Select the manifests to print by entering a loan manifest date. If you enter a value in this field, the **From Manifest Group Number** and **Thru Manifest Group Number** fields are not available.
From Manifest Group Number	Select a group of manifests to print, from this manifest group number through the group number in the **Thru Manifest Group Number** field. The system prints the most current instance of each manifest for that date selected. All loan manifest groups are available, even if they have been printed.
Thru Manifest Group Number	Enter the ending manifest group number to specify the manifests to print.

Printing a Stafford Loan Manifest

Access the DL Print Stafford Manifest page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Print Manifest Report— Stafford**, and then **DL Print Stafford Manifest**).

Use this page to run the Print Manifest Report Stafford process (FAMANFS3).

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Using EC Queue Status with Direct Loan Processing

This section discusses how to review the EC Queue status.

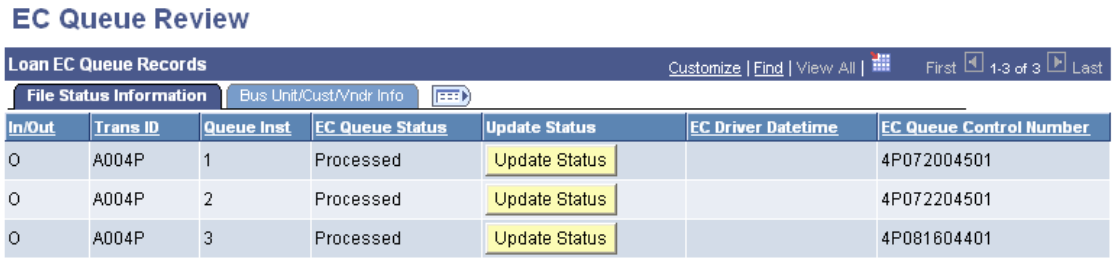
Page Used to Review the EC Queue Status

Page Name	Definition Name	Navigation	Usage
EC Queue Review (electronic commerce queue review)	FA_LN_EDI_ECQUEUE	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Review CL 4 File Transactions**, and then **EC Queue Review**	Review and edit the EC Queue Status for a file in the staging tables. FA_LN_EDI_ECQUEUE

Reviewing the EC Queue Status

Access the EC Queue Review page (**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **Review CL 4 File Transactions**, and then **EC Queue Review**).

This example illustrates the fields and controls on the EC Queue Review page. You can find definitions for the fields and controls later on this page.



Click the **Update Status** button to change the **EC Queue Status** field. The **Override** button toggles through the following values: *P- processed, E- error,* and *L- loaded.*

The **EC Queue Status** indicates the load status for the entire file. A file can contain one or many records. When the flat file is loaded into the EDI Manager staging tables, the EC Queue Status is set to *Loaded.* When the data in the file is moved from the staging tables to the database, the EC Queue Status is set to *Processed.* To prevent a specific file from being loaded to the database, set the EC Queue Status to *Processed* and the system ignores the file on subsequent loads to the database.

To reload a file to the database, set the **EC Queue Status** to *Loaded.*

A file with an **EC Queue Status** of *Error* is automatically recycled attempted to be loaded to the database the next time the inbound process is run.

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Viewing Direct Loan EC History

You can access Direct Loan EC history for aid years that were removed from the menu; it retrieves Direct Loan data from 2004 and earlier.

This section discusses how to enter data to review DL EC history.

Pages Used to View Direct Loan EC History

Page Name	Definition Name	Navigation	Usage
Direct Loan EC History Information	DL_EC_HIST_TRNSFR	**Financial Aid**, and then **Financial Aid History**, and then **View Archived Direct Loan Data**, and then **Direct Loan EC History Information**	Access Direct Loan History.
Batch Header	DL_HDR_ORIG_01	Click the **Originations** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Origination Export component for aid year 2001: Batch Header, Borrower Export Information, Student Export Information, Financial Export Information, and Batch Trailer.
Batch Header	DL_HDR_ORGACK_01	Click the **Originations Acknowledgements** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Origination Acknowledgment Import component for aid year 2001: Batch Header, Origination Acknowledgement, and Batch Trailer.
Batch Header	DL_HDR_CHG_01	Click the **Changes** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Change Export component for aid year 2001: Batch Header, Change Information, and Trailer.
Batch Header	DL_HDR_CHGACK_01	Click the **Change Acknowledgements** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Change Acknowledgment component for aid year 2001: Batch Header, Change Acknowledgement, and Batch Trailer.

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Page Name	Definition Name	Navigation	Usage
Batch Header	DL_HDR_CRD_01	Click the **Credit Decisions** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Credit Import 00/01 component for aid year 2001: Batch Header, Credit Decision, and Batch Trailer.
Batch Header	DL_HDR_PNT_01	Click the **PNote Acknowledgements** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Promissory Note Import component for aid year 2001: Batch Header, Pnote Acknowledgement, and Batch Trailer.
Batch Header	DL_HDR_DSB_01	Click the **Disbursements** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Disbursement Export component for aid year 2001: Batch Header, Disbursement Information, and Batch Trailer.
Batch Header	DL_HDR_DSBACK_01	Click the **Disbursement Acknowledgements** link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Disbursement Acknowledgement Import component for aid year 2001: Batch Header, Disbursement Acknowledgement, and Batch Header.

Entering Data to Review DL EC History

Access the Direct Loan EC History Information page (**Financial Aid**, and then **Financial Aid History**, and then **View Archived Direct Loan Data**, and then **Direct Loan EC History Information**).

Field or Control	Description
ID	Enter the student's ID.
Aid Year	Enter an aid year of 2004 or earlier.
Originations	Click to access the Direct Loan Origination Export component.
Origination Acknowledgements	Click to access the Direct Loan Origination Acknowledgement Import component.
Changes	Click to access the Direct Loan Change Export component.

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Field or Control	Description
Change Acknowledgements	Click to access the Direct Loan Change Acknowledgement component.
Credit Decisions	Click to access the Direct Loan Credit Import component.
Pnote Acknowledgements	Click to access the Direct Loan Promissory Note Import component.
Disbursements	Click to access the Direct Loan Disbursement Export component.
Disbursement Acknowledgements	Click to access the Direct Loan Disbursement Acknowledgement Import component.

Processing Direct Lending Origination Changes

This section discusses how to process Direct Lending origination changes.

Page Used to Process Direct Lending Origination Changes

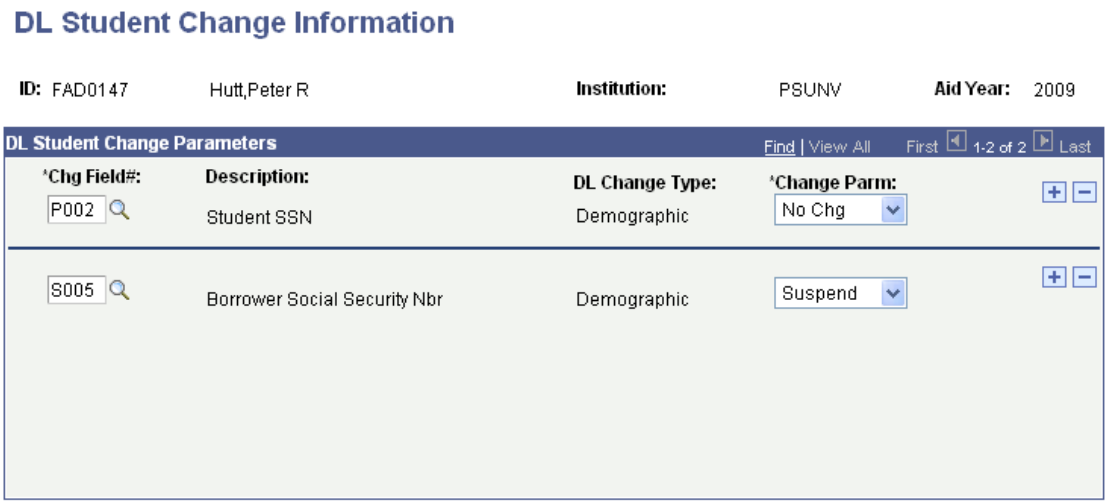
Page Name	Definition Name	Navigation	Usage
DL Student Change Information	LN_DL_EMPL_PARM	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Hold/Suspend Change**, and then **DL Student Change Information**	Set change parameters for a particular student. By setting change parameters for specific fields, you can determine how Direct Lending change processing handles the specified fields for the particular student.

Setting Change Parameters for Direct Loan Origination Changes

Access the DL Student Change Information page (**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Hold/Suspend Change**, and then **DL Student Change Information**).

This example illustrates the fields and controls on the DL Student Change Information page. You can find definitions for the fields and controls later on this page.

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Specify any change processing requirements for the selected student by entering the fields in the **DL Student Change Parameters** group box. The fields are the same fields as on the Ln Dl Inst Parm page.

> **Note**
>
> The above change parameters affect those loans that have been transmitted to the COD. Prior to submitting loans to the COD, you can change the fields on the loan record without generating a change transaction. Change transactions occur when you make changes to loans you have transmitted to the COD.

Understanding Direct Lending Change Processing

This section discusses three examples of the Direct Loan Origination Change process. Each example addresses a different type of change. The processing examples are:

- A bio/demo change.
- An award change.
- A rejected origination change.

Processing a Bio/Demo Change

The following steps represent the process for changing bio/demo data. For this example, the borrower's date of birth requires a change after you have originated the loan and transmitted it to the COD.

To change bio/demo data:

1. Enter and save a new date in the Birth date field on the Bio/Demo Data page (SA_BIO_DEMO_DATA3).
2. For the Loan Change process to recognize the changed field, you can flag the loan for change processing. Click the **Activate Change** button on the Application Acknowledgement page (LOAN_ORIG_STAT_DL0) **(Financial Aid**, and then **Loans**, and

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then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Acknowledgment).**

> **Note**
>
> Click the **Activate Change** button to trigger the Loan Adjustment process to review the student for change transactions. Data changes in the Direct Loan Application component or the Award Entry page do not require you to manually start the Loan Change process here. Click the **Activate Change** button for any other data changes (for example, the student or borrower name) to start the Loan Change process.

3. Initiate the Loan Change process by running the Loan Origination process. Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination**) select the **Adjustments** check box, and run the Loan Origination process.
4. Review the Application Acknowledgment page. At this point, the Loan Process Status is *In Service* and the Loan Orig Trans Stat (loan origination transaction status) is *Change Pending.*
5. Review the Direct Loan Orig Actions page**(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Orig Actions)** to ensure that the change was processed The latest sequence number should reflect an *Origination Change,* with an action status of *Pending.*
6. The change is complete and ready to send to the COD.

Processing an Award Change

The following steps represent the process for changing an award. For this example, you are canceling the borrower's unsubsidized loan after the loan was originated, transmitted, and acknowledged by the COD.

To process an award change:

1. Make the change to the award on the Student Aid Package page (STDNT_AWARD_ENTRY3). If you canceled the Unsubsidized loan, for example, the offered and accepted amounts are now zero.
2. Initiate the Loan Change process by running the Loan Origination process with the **Adjustments** check box selected.
3. Review the Application Acknowledgment page to verify the Loan Change process completed successfully. See Step 4 under Processing a Bio/Demo Change. At this point, the **Loan Process Status** is *In Service* and the **Loan Orig Trans Stat** (loan origination transaction status) is *Change Pending.*
4. Review the Direct Loan Orig Actions page **(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Orig Actions)** to ensure the change was processed The latest sequence number should reflect an *Origination Change,* with an **action status** of *Pending.*
5. At this point, the change is complete and you would create the Direct Loan Change Processing outbound file to send to the COD. View this file using the Direct Loan Change Export nn/nn component. The COD must acknowledge the change by sending a Direct Loan Change Acknowledgement file.

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Processing a Rejected Origination Change

The following steps represent the process when a change is sent to the COD and the COD rejects the change. In this example, you attempt to change the citizenship status of a student.

To process a rejected origination change:

1. Change the value of the **Citizenship Status** field on the Citizenship Detail page from the Bio/Demo Data page (SA_BIO_DEMO_DATA3).
2. For the Loan Change process to recognize the changed field, flag the loan for change processing. Click the **Activate Change** button on the Application Acknowledgement page **(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Manage Direct Loan Application**, and then **Application Acknowledgment).**

   > **Note**
   >
   > Click the **Activate Change** button to trigger the Loan Adjustment process to review the student for change transactions. Data changes in the Direct Loan Application component or the Award Entry page do not require you to manually start the Loan Change process here. Click the **Activate Change** button for any other data changes (for example, the student or borrower name) to start the Loan Change process.

3. Initiate the Loan Change process by running the Loan Origination process with the **Adjustments** check box selected. Access the Loan Origination page (**Financial Aid**, and then **Loans**, and then **Process Loans**, and then **Loan Origination).**). Select the **Adjustments** check box and run the Loan Origination process.
4. Review the Application Acknowledgment page to verify that the Loan Change process completed successfully. See Step 4 under Processing a Bio/Demo Change. At this point, the **Loan Process Status** is *In Service* and the **Loan Orig Trans Stat** (loan origination transaction status) is *Change Pending.*
5. Review the Direct Loan Orig Actions page **(Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **View Loan Processing Actions**, and then **Direct Loan Orig Actions)** to ensure the change was processed. The latest sequence number should reflect an *Origination Change,* with an **action status** of *Pending.*
6. Run the Origination Change Outbound and Outbound EC Agent (EDI outbound) processes to export the file to the COD.
7. The COD returns the acknowledgement file that includes the error code.
8. Run the COD Inbound processes to import the COD data.
9. Review the Exception Error, the DL Inbound Origination Acknowledgement Errors, and the DL Rejected Origination Changes reports to determine which records contain errors.
10. Review the Application Acknowledgment page to view the inbound file you determined has an error. See Step 4 under Processing a Bio/Demo Change.
11. Review the Direct Loan Orig Actions page (LN_DL_ORIG_INQ) to see details about the error. The latest sequence shows an origination change with an **action status** of *Rejected.*
12. Fix the error and resubmit the change record to the COD.

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Managing Direct Lending Cash Transactions

This section provides an overview of direct lending cash management and discusses how to manage Direct Lending cash transactions

Understanding Direct Lending Cash Management

Managing your Direct Lending cash transactions entails entering information for cash receipts, cash draw-downs, and return of excess cash, and then reconciling that information with similar information from the COD. You also reconcile individual student disbursements using the data in your Loan Application tables and the disbursement information from the COD. Reconciliation ensures on a monthly basis that your institution reviews and compares its Direct Lending origination and disbursements to student accounts against the cash balance reported by the COD.

For each reconciliation period, a comparison is made among Financial Aid, PeopleSoft Student Financials, and COD data. Data from all three sources should match. The Student Financials data shows dollars actually disbursed to students and the amount of each cash receipt and return of excess cash.

Your institution receives cash receipts from Grants Administration and Payment System (GAPS) and returns excess cash to GAPS. Usually, the Bursar's Office interacts directly with GAPS to request funds for Direct Loan disbursements to students. Work with your Bursar's Office or other appropriate office when using the Cash Reconciliation pages.

Understanding the Direct Loan School Account Statement

The COD sends the Direct Loan School Account Statement (DLSAS) to schools that participate in the Direct Lending program. The U.S. Department of Education's *COD Technical Reference* states that schools must reconcile their Direct Loan records on file at the COD with their internal Direct Lending records. This School Reconciliation process should be performed on a monthly basis.

Each school is responsible for reviewing the monthly statement to ensure the accuracy of the data. This data must also be reconciled to the school's internal student account records and bank records.

Managing Direct Lending Cash Transactions

The general steps used in the Direct Lending Cash Management process are:

1. Set up your Cash Transaction page for the aid year.
2. Receive cash receipts cash drawdowns and return excess cash.
3. Enter your cash receipt and return of excess cash information on the Cash Transaction page.
4. Enter your cash receipt and return of excess cash information on the Cash Detail page.
5. Use the online and report information to reconcile your institutional data with the COD data.
6. Repeat Steps 2 - 5 for each Reconciliation Period.

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Entering Cash Summary Data

Before you receive the SAS file, you can manually enter cash transactions, including information about your cash receipts from GAPS, and your excess cash returned to GAPS. The DL-SAS reports use the data you enter manually to compare and match reported fund levels from the DL-SAS file.

This section discusses how to enter institutional data for cash transactions.

> **Note**
>
> This page is used for the DLSAS processing.

Page Used to Enter Cash Summary Data

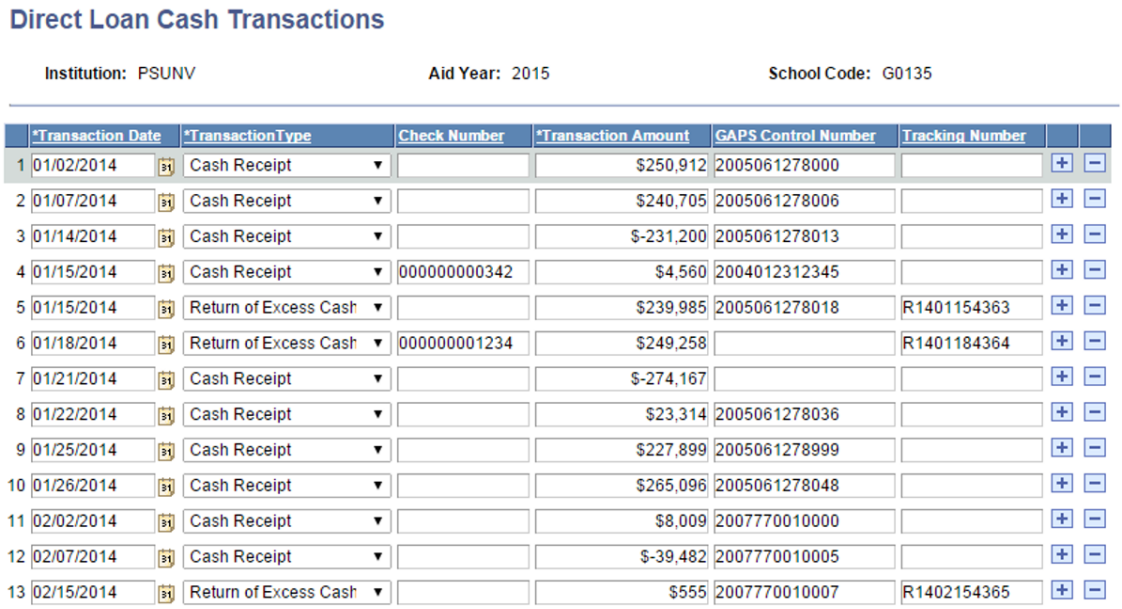
Page Name	Definition Name	Navigation	Usage
Direct Loan Cash Transactions	LN_DL_CASH_DTL	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **Manage DL Cash Transactions**, and then **Direct Loan Cash Transactions**	Enter your institutional data for cash transactions, including information about your cash receipts from GAPS and your excess cash returned to GAPS.

Entering Institutional Data for Cash Transactions

Access the Direct Loan Cash Transactions page (**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **Manage DL Cash Transactions**, and then **Direct Loan Cash Transactions**).

This example illustrates the fields and controls on the Direct Loan Cash Transactions page. You can find definitions for the fields and controls later on this page.

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Direct Loan Cash Transactions

Institution: PSUNV Aid Year: 2015 School Code: G0135

	*Transaction Date	*TransactionType	Check Number	*Transaction Amount	GAPS Control Number	Tracking Number
1	01/02/2014	Cash Receipt		$250,912	2005061278000	
2	01/07/2014	Cash Receipt		$240,705	2005061278006	
3	01/14/2014	Cash Receipt		$-231,200	2005061278013	
4	01/15/2014	Cash Receipt	000000000342	$4,560	2004012312345	
5	01/15/2014	Return of Excess Cash		$239,985	2005061278018	R1401154363
6	01/18/2014	Return of Excess Cash	000000001234	$249,258		R1401184364
7	01/21/2014	Cash Receipt		$-274,167		
8	01/22/2014	Cash Receipt		$23,314	2005061278036	
9	01/25/2014	Cash Receipt		$227,899	2005061278999	
10	01/26/2014	Cash Receipt		$265,096	2005061278048	
11	02/02/2014	Cash Receipt		$8,009	2007770010000	
12	02/07/2014	Cash Receipt		$-39,482	2007770010005	
13	02/15/2014	Return of Excess Cash		$555	2007770010007	R1402154365

To report your cash transactions, set up the Direct Loans Cash Transactions page for the new aid year.

Field or Control	Description
Transaction Date	Enter the date on which the cash transaction occurred at your institution.
Transaction Type	Select the cash transaction that you are entering: *Cash Receipt:* Your institution receives a cash draw down. *Return of Excess Cash:* Your institution returns excess cash.
Check Number	Enter the number of the check sent to the U.S. Department of Education for returned funds. This information typically comes from your Bursar's Office. This field is only used with cash return transactions. You or the Bursar Office can enter the data in this field.
Transaction Amount	Enter the total amount of funds received from GAPS or returned to GAPS for this transaction. This information typically comes from your Bursar's Office. You or the Bursar Office can enter the data in this field.
GAPS Control Number (Grants Administration and Payment System control number)	Enter the GAPS Control Number received from GAPS. This information typically comes from your Bursar's Office. You or the Bursar Office can enter the data in this field.
Tracking Number	Enter the Tracking Number returned from the U.S. Department of Education as confirmation that they have received a Return of Excess Cash Transaction. Populating this alphanumeric field has no bearing on any Direct Loan School Account Statement processing or reporting. It is for information only.

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Importing School Account Statement Data

Use the FA Inbound page to import the SAS file types (DSDFnnOP and/or DSLFnnOP, where nn is the processing year), and SAS Disbursement Detail On Demand file types (DSRFnnOP, DSMFnnOP and/orDSYFnnOP, where nn is the processing year). The FA_INBOUND Application Engine process loads the data into staging tables.

This section discusses how to load the SAS file.

Page Used to Load the SAS File

Page Name	Definition Name	Navigation	Usage
FA Inbound	RUNCTL_FA_INBOUND	**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**	Load external financial aid electronic commerce files.

Loading the SAS File

Access the FA Inbound page (**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**).

Use the **Inbound File** field to set the location and name of the file to be loaded. Make sure that your application server has access to the location of the file.

> **Note**
>
> The FA_INBOUND process automatically determines the file type by reading the header row of the file. It is important that the file be in its original, unaltered state. Opening the file with a text editor that automatically reformats the file—such as trimming blank spaces at the end of each row of data in the file—may cause the load to fail.

Viewing School Account Statement Data

This section lists the pages used to view School Account Statement data.

- View header information.
- View Direct Loan School Account Statement Disbursement Detail On Demand information.
- View cash summary information.
- View disbursement summary information.
- View cash detail information.
- View loan level detail information.
- View disbursement activity information.
- View trailer information.

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For descriptions of the School Account Statement fields displayed in these pages, refer to the U.S. Department of Education's *COD Technical Reference.*

Pages Used to View Data Import Information

Page Name	Definition Name	Navigation	Usage
Batch Header	DL_HDR_DLSAS_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **Batch Header**	View header information from the SAS file.
DLSAS On Demand (Direct Loan Student Account Statement on Demand)	DL_DLSAS_DEMAND_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **DLSAS On Demand**	View Direct Loan Student Account Statement Disbursement Detail On Demand disbursement, amount, and total information.
Cash Summary	DL_DLSAS_CSHSUM_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **Cash Summary**	View cash summary information from Sections I and II (Fixed Length)—Year-To-Date and Monthly Cash Summary (Record Type "T") of the SAS file.
Disbursement Summary	DL_DLSAS_DISSUM_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **Disbursement Summary**	View disbursement summary information from Sections III and IV (Fixed Length)—Year-To-Date and Monthly Disbursement Summary by Loan Type (Record Types "Y" and "M") of the SAS file.
Cash Detail	DL_DLSAS_CSHDTL_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **Cash Detail**	View cash detail information from Section V (Fixed Length)—Cash Detail (Record Type "C") of the SAS file.
Loan Level Detail	DL_DLSAS_LNLVL_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **Loan Level Detail**	View loan level detail information from Section VI (Fixed Length)—Loan Detail, Loan Level (Record Type "L") of the SAS file.

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Page Name	Definition Name	Navigation	Usage
Disbursement Activity	DL_DLSAS_LNDAL_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **Disbursement Activity**	View disbursement activity information from Section VII (Fixed Length)—Loan Detail, Disbursement Activity Level (Record Type "D") of the SAS file.
Batch Trailer	DL_TRL_DLSAS_nn	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **DLSAS Import 20nn-20nn**, and then **Batch Trailer**	View trailer information from the SAS file.

Importing the Loan Limit Exception Report

Access the FA Inbound page (**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**).

The FA_INBOUND Application Engine process loads the file contents into staging tables for subsequent review and processing.

Field or Control	Description
Inbound File	Specify the location and name of the file to be loaded. Ensure the application server has access to the specified file location.

The FA_INBOUND process identifies the file as a Loan Limit Exception Report by reading the first 14 characters of the file and verifying that the value is INSTITUTIONAL. The file must remain in its original, unaltered format.

Viewing the Loan Limit Exception Report Data

Access the Loan Limit Exception Report page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Loan Limit Exception Report**).

Campus Solutions loads data from the Loan Limit Exception Report into the SFA_LN_LMT_DTL table for inquiry.

Updating FA Term with Loan Limit Exception Report Data

Use Population Selection Update to move imported report data and update the OB3 Legacy Eligible Flag field on the OB3 Info page in FA Term.

Population selection enables you to use different tools to select IDs for a process. You can use a PS query, equation engine equation, or flat file or delimited file as a selection tool, or you can create other tools, to control which fields and records to use to identify the population. When you set up the tool in your system, you identify how many result rows to return and whether you want users to be able to preview results before running the process. Using contexts, you identify the processes for which the Population Selection feature will be available. Using

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context mapping, you can see which fields are mandatory or optional for the process. Inside the context, you also grant selection tool security to users.

For more information on using population selection, see Selecting the Update Parameters.

Related Topics

- Viewing One Big Beautiful Bill (OB3) Information
  Access the OB3 Info page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **OB3 Info**).

Working with the DL School Account Statement and the DL Reconciliation Reports

This section discusses how to:

- Generate the DL School Account Statement report.
- Generate the DL Reconciliation report.

Pages Used to Generate DL School Account Statement and Reconciliation Loan Destination Reports

Page Name	Definition Name	Navigation	Usage
DL School Account Statement	RUNCTL_DLSAS	**Financial Aid**, and then **Loans**, and then **DL School Account Statement**, and then **Generate DLSAS Report**, and then **DL School Account Statement**	Generate the DL School Account Statement Report. This report prints the data in the DLSAS flat file from the EDI Manager staging tables.
DL Reconciliation Report	RUNCTL_DL_RECON	**Financial Aid**, and then **Loans**, and then **DL School Account Statement**, and then **Generate Reconciliation Report**, and then **DL Reconciliation Report**	Generate the DL Reconciliation Report, which compares cash detail, loan detail, and disbursement activity with institutionally-entered information in the database.

Generating the DL School Account Statement Report

Access the DL School Account Statement page (**Financial Aid**, and then **Loans**, and then **DL School Account Statement**, and then **Generate DLSAS Report**, and then **DL School Account Statement**).

Use this page to run the DL School Account Statement (FADLSAS) process to print both file types, DSDFnnOP DL-SAS Import School Account Statement (Fixed-Length, Disbursement Level Loan Detail) and DSLFnnOP DL-SAS Import School Account Statement (Fixed-Length, Loan Level Loan Detail). where nn is the aid year.

This report prints the data in the DLSAS flat file from the EDI Manager staging tables. The original data the COD provides does not identify students by name, but by Loan ID number.

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When you run this report, the system matches the Loan IDs in the Loan Detail Records section of the report with the student ID to identify each student by name.

Field or Control	Description
DL Batch ID (direct lending batch ID)	Enter the direct lending batch ID that represents the DLSAS file to include on this report. This is the School Account Statement Batch ID defined in the U.S. Department of Education's *COD Technical Reference.*

> **Important**
>
> To maintain a historical archive of the DL School Account Statement Report, rename the files generated by the report. If you do not change the file names, the system writes over the existing files when you run subsequent reports.

> **Note**
>
> The School Account Statement (SAS) report options are year-specific; update your report options and preferences with the COD separately for each year to change the defaults. Ensure that you use the correct program year in the SAS Report Options page before updating your options.

For more information, see U.S. Department of Education's Common Origination and Disbursement (COD) Technical Reference

Generating the DL Reconciliation Report

Access the DL Reconciliation Report page (**Financial Aid**, and then **Loans**, and then **DL School Account Statement**, and then **Generate Reconciliation Report**, and then **DL Reconciliation Report**).

Field or Control	Description
DL Batch ID	Enter the DL Batch ID of a previously loaded SAS file. You cannot run this report without first loading one or more SAS files.

Reviewing the DL Reconciliation Report

The three main sections in the report are:

- Cash summary information
- Cash detail
- Loan detail

Cash Summary Information

This section of the report contains:

- Year-to-date cash summary.

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- Monthly cash summary.
- Year-to-date disbursement summary by loan type.
- Monthly disbursement by loan type.

Cash Detail

The content of this section of the report depends on the information in the SAS file.

If the file contains monthly cash detail (default), the system compares the data from the SAS file to data in PS_LN_DL_CASH_DTL for the month specified only.

This section reports any mismatches where:

- Cash transactions in the SAS file are not in the database.
- Cash transactions in the database are not in the SAS file.
- Year-to-date cash detail: The system compares the data from the SAS file to all data in PS_LN_DL_CASH_DTL for the specified aid year.

The section reports any mismatches where:

- Cash transactions in the SAS file are not in the database
- Cash transactions in the database are not in the SAS file.
- No cash detail: The section contains a *No Cash Detail* message.

Loan Detail

The content of this section of the report depends on the information in the SAS file.

If the file contains monthly disbursement detail without loan summary (default), the system compares the data from the SAS file to data in PS_LOAN_DISB_ACTION for the month specified only.

The section also reports any mismatches where:

- Disbursement transactions in the SAS file are not in the database.
- Disbursement transactions in the database are not in the SAS file.
- Disbursement transactions that match based on disbursement number and disbursement sequence number have differing amounts or dates.

> **Note**
>
> You can use the disbursement sequence number to compare information from the SAS file against the database.

- Year-to-date disbursement detail: The system compares the data from the SAS file with the sum of data in PS_LOAN_DISBMNT where LOAN_PAID_IND = "Y" and with data in PS_LOAN_DISB_ACTN.

The section reports any mismatches at the loan level where:

- Loan level records in the SAS file are not in the database.
- Loan level records in the database that have a disbursed amount greater than zero are not in the SAS file.

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- Loan level records that match based on loan ID have differing gross, fee, rebate, or net amounts.

  The section also reports any mismatches at the disbursement activity level where:

- Disbursement transactions in the SAS file are not in the database.
- Disbursement transactions in the database (that have a disbursed amount greater than zero) are not in the SAS file.
- Disbursement transactions that match based on disbursement number and disbursement sequence number have differing amounts or dates.
- Year-to-date loan level detail: The system compares the data from the SAS file with the sum of data in PS_LOAN_DISBMNT where LOAN_PAID_IND = "Y."

The section reports any mismatches where:

- Loan level records in the SAS file are not in the database.
- Loan level records in the database that have a disbursed amount greater than zero are not in the SAS file
- Loan level records that match based on loan ID have differing gross, fee, rebate, or net amounts.
- No loan detail: The section contains a "No Loan Detail" message.

The format of the loan detail section of the report also depends on the data included in the SAS file.

Reviewing SAS Files with Monthly Disbursement Level Detail Only

For SAS files with monthly disbursement level detail only (no loan level detail), the section contains the following information for each loan ID:

Field	Row 1	Row 2	Row 3	Row 4
EmplID	From system data.			
Student Name	From system loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)		
Loan ID	From system loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record		
Disbursement Number			From system disbursement transaction data.	From COD disbursement transaction data.
Disbursement Sequence Number			From system disbursement transaction data.	From COD disbursement transaction data.
Transaction Type			From system disbursement transaction data.	From COD disbursement transaction data.

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Field	Row 1	Row 2	Row 3	Row 4
Disbursement Date			From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Gross Amount	From system loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Loan Fee Amount	From system loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Interest Rebate Amount	From system loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Net Amount	From system loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From system disbursement transaction data.	From COD disbursement transaction data.
Disbursement Actual Net Adjustment Amount			From system disbursement transaction data	From COD disbursement transaction data.
Transaction Date			From system disbursement transaction data.	From COD disbursement transaction data.

> **Note**
>
> Rows 3 and 4 repeat for each disbursement transaction associated with the loan ID.

For SAS files with year-to-date disbursement level detail and loan level summary, the section contains the following information for each loan ID:

Field	Row 1	Row 2	Row 3	Row 4
EmplID	From system loan data.			
Student Name	From system loan data.	From COD loan data (pulled from loan level summary record		

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Field	Row 1	Row 2	Row 3	Row 4
Loan ID	From system loan data.	From COD loan data (pulled from loan level summary record		
Disbursement Number			From system disbursement transaction data.	From COD disbursement transaction data.
Disbursement Sequence Number			From system disbursement transaction data.	From COD disbursement transaction data.
Transaction Type			From system disbursement transaction data.	From COD disbursement transaction data.
Disbursement Date			From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Gross Amount	From system loan data.	From COD loan data (pulled from loan level summary record)	From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Loan Fee Amount	From system loan data.	From COD loan data (pulled from loan level summary record)	From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Interest Rebate Amount	From system loan data.	From COD loan data (pulled from loan level summary record)	From system disbursement transaction data.	From COD disbursement transaction data.
Loan/ Disbursement Actual Net Amount	From system loan data.	From COD loan data (pulled from loan level summary record)	From system disbursement transaction data.	From COD disbursement transaction data.
Disbursement Actual Net Adjustment Amount			From system disbursement transaction data.	From COD disbursement transaction data.
Transaction Date			From system disbursement transaction data.	From COD disbursement transaction data.

> **Note**
>
> Rows 3 and 4 repeat for each disbursement transaction associated with the loan ID.

For SAS files with year-to-date loan level detail (loan level detail only), the section contains the following information for each loan ID:

Field	Row 1	Row 2
EmplID	From system loan data.	

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Field	Row 1	Row 2
Student Name	From system loan data.	From COD loan data.
Disbursement Number		
Disbursement Sequence Number		
Transaction Type		
Disbursement Date		
Loan/Disbursement Actual Gross Amount	From system loan data.	From COD loan data.
Loan/Disbursement Actual Loan Fee Amount	From system loan data.	From COD loan data.
Loan/Disbursement Actual Interest Rebate Amount	From system loan data.	From COD loan data.
Loan/Disbursement Actual Net Amount	From system loan data.	From COD loan data.
Disbursement Actual Net Adjustment Amount		
Transaction Date		

Running Direct Loan Reports

Most Direct Lending reports are generated from a generic run control page, but some reports have their own run control pages.

This section discusses how to:

- Use the generic run control page for Direct Lending reports.
- Generate the Direct Lending Loan Booking Status Report.
- Use demographic data selection for loan origination.

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Pages Used to Run Direct Lending Reports

Page Name	Definition Name	Navigation	Usage
Financial Aid Reports	RUN_CNTL_DL_RPT	• **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Disbursement Errors Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Accepted Originations Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Loans on Hold Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **PLUS Credit Decisions Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Rejected Originations Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending**	Generate many of the Direct Lending reports. The navigation path varies depending on the report that you generate.

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Page Name	Definition Name	Navigation	Usage
		Reconciliation, and then **Origination Export Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Change Pending Status Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Validation Errors Report**, and then **Financial Aid Reports** • **Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Inbound Errors Report**, and then **Financial Aid Reports** • You can access the Financial Aid Reports page through multiple navigation paths in addition to the paths listed above.	
DL Booking Status Report	RUN_CNTL_FADLBOOK	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Booking Status Report**, and then **DL Booking Status Report**	Generate the Direct Lending Originations Booking report (FADLBOOK).

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Using the Generic Run Control Page for Direct Lending Reports

Access the Financial Aid Reports page (**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Disbursement Errors Report**, and then **Financial Aid Reports**).

Select the **Academic Institution** and **Aid Year** for which to run the report.

Generating the Direct Lending Loan Booking Status Report

Access the DL Booking Status Report page (**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Booking Status Report**, and then **DL Booking Status Report**).

Select the **Academic Institution** and **Aid Year** for this report. For the **Direct Lending Booked Status,** select *Booked* or *Unbooked* loans.

Using Demographic Data Selection for Loan Origination

The loan processes use three types of demographic data, address, phone number, and name. The views used to access this data are:

- LN_MAIL_ADDR_VW
- LN_PERM_ADDR_VW
- LN_PHONE_VW
- LN_NAME_VW

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38

Managing Loan Counseling

Managing Loan Counseling Data

Use these pages to manage loan counseling data.

Pages Used to Manage Loan Counseling Data

Page Name	Definition Name	Navigation	Usage
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary	Display of loan counseling data depends on selected Loan Counseling Version defined on the Financial Aid Installation Defaults setup.
Entrance/Exit Loan Counseling	SFA_LN_CNSL_TBL	Financial Aid, Loans, Manage Loan Counseling Data, Entrance/Exit Loan Counseling Financial Aid, View Packaging Status Summary, Packaging Status Summary page, Loan Counseling Status link	Add and manage loan counseling requirements. The Loan Counseling Status link is available when the **Loan Counseling Version** in the Financial Aid Installation Defaults is set to *Expanded.*
Add Loan Counseling Data	SFA_RUN_LN_CNSL	Financial Aid, File Management, Loan Counseling, Add Loan Counseling Data	Process to automate creating loan counseling data. Process can be used to supplement the Process COD (Entrance) Counseling Data and Process (NSLDS) Exit Counseling Data processes.
Process COD Counseling Data	SFA_CNSL_UPD_RC	Financial Aid, File Management, Loan Counseling, Process COD Counseling Data	Load and evaluate COD Counseling data from the COD staging tables to the application Loan Counseling table.

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Page Name	Definition Name	Navigation	Usage
Manage COD Counseling Suspense	SFA_CNSL_UPD_SUSP	Financial Aid, File Management, Loan Counseling, Manage COD Counseling Suspense	Review and resolve COD Counseling data that did not load into the Loan Counseling table.
View DL Loan Counseling Data	SFA_ENTRANCE_SUMM	Financial Aid, File Management, Loan Counseling, View DL Loan Counseling Data	View Direct Loan counseling data loaded from message classes DECFENOP and DLFFEXOP.
Process Exit Counseling Data	SFA_RUN_EXITCNSL	Financial Aid, File Management, Loan Counseling, Process Exit Counseling Data	Evaluates NSLDS loan exit counseling data to match with students.
Manage Exit Counseling Suspense	SFA_EXIT_CNSL_SUSP	Financial Aid, File Management, Loan Counseling, Manage Exit Counseling Suspense	Review and manage suspended NSLDS loan exit counseling records.
View Exit Counseling Staging Header/Trailer	SFA_EXIT_CNSL_HDR	Financial Aid, File Management, Loan Counseling, View Exit Counseling Staging	View NSLDS exit counseling header/ trailer data in the staging table.
View Exit Counseling Staging Detail	SFA_EXIT_CNSL_DTL	Financial Aid, File Management, Loan Counseling, View Exit Counseling Staging, Detail tab	View NSLDS exit counseling detail data in the staging table.

Viewing Loan Counseling Data

Access the Packaging Status Summary (**Financial Aid**, and then **View Packaging Status Summary**).

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Field or Control	Description
Loan Entrance Interview Status	Indicates whether the student has completed a loan entrance interview for the corresponding aid year. If you select the Loan Entrance Intervw Req (loan entrance interview required) check box on the Disbursement Rules: Item Type - Indicators page, the interview status value affects how the authorization process treats the student's award. *(blank):* The authorization process automatically determines whether the student has satisfied the loan entrance counseling requirement using the process activated when you select the Loan Entrance Intervw Req check box. *Complete:* The student has completed a loan entrance interview. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized. Set this value after confirmation of the student's completion of loan entrance counseling. *Inst Req (institution required):* Your institution requires the student to have a loan entrance interview, regardless of whether the authorization process requires an interview for loan awards. If the Loan Entrance Intervw Req check box is selected, the authorization process fails until you reset the status to Complete or Pending. Students with prior loan history also fail authorization until you reset the status to blank, Complete, or Pending. *Pending:* The student's loan entrance interview is pending. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized. **Note:** This field appears when the Loan Counseling Version is set to "Simple" on the Financial Aid Installation Defaults page.
Exit Interview	Indicates whether the student has completed a loan exit interview for the corresponding aid year. This field is for informational use only because no delivered process currently uses the value of this field. *Complete:* The student has completed a loan exit interview. *Inst Req (institution required):* our institution requires the student to have a loan exit interview. Pending: The student's loan exit interview is pending. **Note:** This field appears when the Loan Counseling Version is set to "Simple" on the Financial Aid Installation Defaults page.

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Field or Control	Description
Loan Counseling Status	Click this link to open the Entrance/Exit Counseling page. **Note:** This link appears when the **Loan Counseling Version** is set to *Expanded* on the Financial Aid Installation Defaults page.

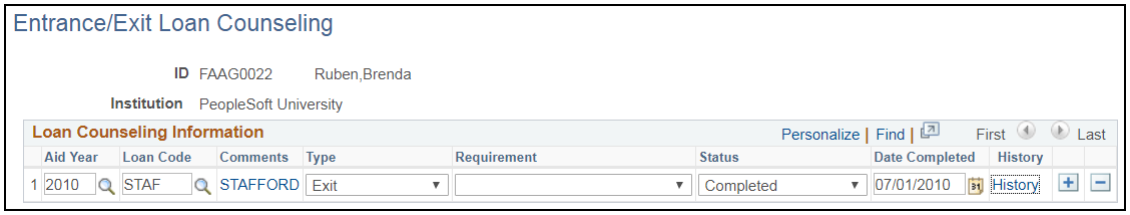
For a complete description of the Packaging Status Summary page:

See Reviewing the Student's Packaging Status.

Entrance/Exit Counseling Data

Access the Entrance/Exit Counseling Data (**Financial Aid**, and then **Loans**, and then **Manage Loan Counseling Data**, and then **Entrance/Exit Loan Counseling**) or (**Financial Aid**, and then **View Packaging Status Summary**, and then **Packaging Status Summary page**, and then **Loan Counseling Status link**).

This example illustrates the fields and controls on the Entrance/Exit Loan Counseling page. You can find definitions for the fields and controls later on this page.



Use this page to enter entrance and exit loan counseling requirements. If you set the **Loan Counseling Version** to *Expanded* in the Financial Aid Defaults page and select the *Loan Entrance Intervw Req* (loan entrance interview required) check box on the Disbursement Rules: Item Type - Indicators page, then the authorization process evaluates this record to determine if the entrance loan counseling requirement has been satisfied. The combination of a valid *Date Completed* value and loan counseling type (*Annual* or *Multi-Year* is used to evaluate whether the entrance loan counseling requirement has been satisfied.

Use this page to enter entrance or exit loan counseling requirements.

Field or Control	Description
Loan Code	Select user defined Loan Code. Loan Code associated to the Federal Stafford type impacts the authorization and disbursement of Stafford Subsidized and Unsubsidized item types.
Comments	Click link to enter any notes about the loan.
Type	Select the type of loan counseling: *Entrance* or *Exit.*

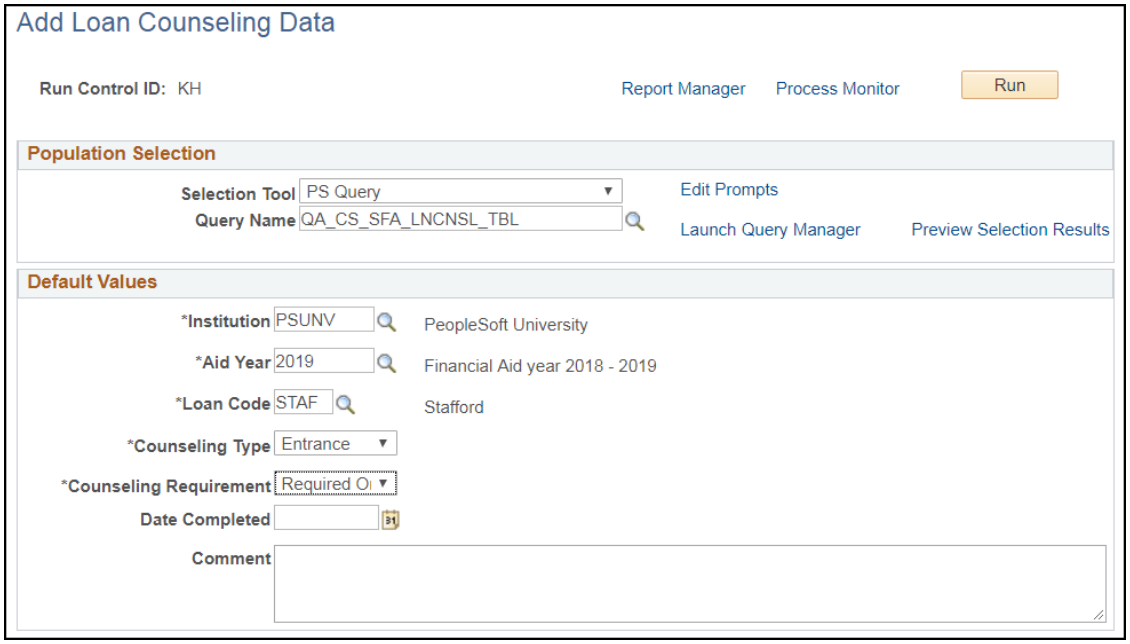
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Field or Control	Description
Requirement	Select the interval for loan counseling: *Required Annually* or *Required Once*. **Note:** This is only relevant for loan entrance counseling. When processing COD or NSLDS exit counseling data, the Requirement field is left blank.
Status	Select the status of the loan counseling requirement. The default status is *Pending*. **Status** is up dated to *Completed* if a valid **Date Completed** is entered.
Date Completed	Select the date that the requirement was completed. The **Date Completed** can be updated during the Process COD Counseling data process when COD Counseling data is evaluated.
History	Click this link to view the student's history of loan counseling transactions. The **History** link is created during the Process COD Counseling and the Process Exit Counseling Data for NSLDS. When the process encounters a condition to update and retain history for a specific aid year update, the **History** link appears. Click on the link to display the history of transactions.

Adding Loan Counseling Data

Access the Add Loan Counseling Data page (**Financial Aid**, and then **File Management**, and then **Loan Counseling**, and then **Add Loan Counseling Data**).

This example illustrates the fields and controls on the Add Loan Counseling Data page. You can find definitions for the fields and controls later on this page.



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Use this page to add loan counseling data into the Loan Counseling table, SFA_LN_CNSL_TBL, in batch.

During Population Selection, if any of the **Default Value** fields are blank or not provided, then the specified default value is inserted into the field value for each loan counseling record added. If any of the **Default Value** fields already contain a valid value from the Population Selection, the default value is ignored.

Field or Control	Description
Selection Tool	Select from *Equation Engine, PS Query,* or *External File.* Additional parameters are displayed for your selected tool. **Note:** You may design your population selection to retrieve only student ID's and leave all other fields blank. If you do this, use the **Default Values** to populate the field values in the Loan Counseling records. If you retrieve values other than the student ID's with population selection, all valid values are used to create the Loan Counseling records, ignoring the corresponding **Default Values.** The Default Value for a particular field is only used to populate a Loan Counseling record if the retrieved value is invalid or blank.
Query Name	Appears only when PS Query is selected. Select a population selection query that joins with the bind record SFA_LNCNSL_BIND.
Institution	Enter the academic institution for the students of the loan counseling data you wish to add.
Aid Year	Enter the **Aid Year** of the loan counseling data you wish to add.
Loan Code	Enter the **Loan Code** (for example, Stafford) of the loan counseling data you wish to add.
Counseling Type	Enter the **Counseling Type,** *Entrance* or *Exit,* of the loan counseling data you wish to add.
Counseling Requirement	Enter the **Counseling Requirement,** *Required Annually* or *Required Once,* of the loan counseling data you wish to add.
Date Completed	Enter the date that the loan counseling requirement was completed. **Date Completed** is the only **Default Value** field that can be left blank. If a Loan Counseling record is created and no **Date Completed** is provided, the loan counseling requirement's **Status** remains *Pending*. Pending records can be updated using the Process COD Counseling Data process.
Comment	Enter a comment to update each counseling transaction added or updated during this run instance.

Processing COD Loan Counseling Data

Access the Process COD Counseling Data page (**Financial Aid**, and then **File Management**, and then **Loan Counseling**, and then **Process COD Counseling Data**).

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Students can complete Direct Loan Entrance and Exit Counseling on the StudentLoans.gov website and indicate to which schools COD should send the loan counseling acknowledgments.

There are two types of Direct Loan Entrance Counseling records:

- DLSCounseling indicates that the student has completed Sub/Unsub Stafford Loan Entrance Counseling.
- DLPCounseling indicates that the student has completed Sub/Unsub Stafford and PLUS Loan (for Graduate and Professional Students) Entrance Counseling.

There is one type of Direct Loan Exit Counseling that covers all Direct Loan types.

> **Note**
>
> Direct Loan Exit Counseling Data from COD differs from Loan Exit Counseling Data from NSLDS in that the COD data reports the counseling type and date completed while NSLDS data provides the information reported by the student in regards to contact information, employer information, etc.

This process evaluates the COD Direct Loan Counseling data from the COD staging tables to add to or update the Loan Counseling application table (SFA_LN_CNSL_TBL).

For more information on NSLDS Exit Counseling, please see Processing NSLDS Loan Exit Counseling Data.

Field or Control	Description
Override COD Routing ID and **Routing ID**	Select the **Override COD Routing ID** check box and enter a **Routing ID** to process data for a single COD Routing ID. If you do not select the check box, the process runs for all Active Routing ID's mapped to the selected Institution.
Counseling Option	Select *Both*, *Entrance*, or *Exit* to indicate which type of loan counseling data you want to process.
Update/Insert Option	*Update Only:* Select this option if you want to only update existing loan counseling records that do not have a valid **Date Completed** value. When no existing record is found, the COD Counseling data is suspended with a reason of "No Stafford record found" for DLSCounseling data or "No Grad PLUS record found" for DLPCounseling data. *Insert/Update:* Select this option if you want to create new Loan Counseling records as well as update existing loan counseling records that do not have a valid **Date Completed** value.

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Field or Control	Description
Selection Option	Use the **Selection Option** to choose whether you want to evaluate unprocessed COD loan counseling records, suspended COD loan counseling records, or both. *All:* Select this option to evaluate both Suspended and Unprocessed records. *Suspended Only:*Select this option to evaluate only Suspended records. *Unprocessed:*Select this option to evaluate only Unprocessed records.
Use latest awarded Aid Year	Select this check box to direct the process to document the students' exit counseling completions to the most recent aid year for which the student has been awarded. This overrides the financial aid award year that is reported in the COD loan counseling file.
Process GradPLUS	For Entrance Counseling, selecting this option evaluates DLPCounseling records for possible update or insert to both Stafford *and* Graduate PLUS loan counseling types. The presence of a DLPCounseling type indicates that the student completed entrance counseling as a graduate student. If this option is selected, the DLPCounseling record is evaluated to determine if both the GradPLUS *and* Stafford loan counseling requirements are met. If this option is not selected, the DLPCounseling record is evaluated *only* to determine if the Stafford loan counseling requirement is met. For Exit Counseling, selecting this option updates the exit counseling requirement as completed for Stafford *and* GradPLUS. If this option is not selected, the process will mark *only* the Stafford exit counseling requirement as being completed.
Select Within Aid Year	Select this option to evaluate a specific **Aid Year** of COD counseling transactions. Selecting this option activates an **Aid Year** field to identify the **Aid Year** to be evaluated.

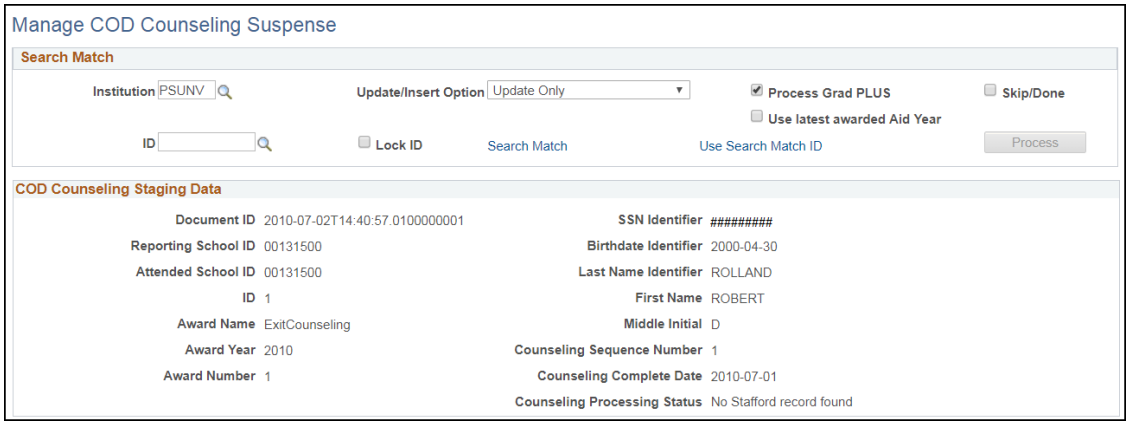
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> **Note**
>
> The process has logic that accounts for existing entrance counseling data. Here are some examples:
>
> Example 1: A student has an existing Loan Entrance Counseling record for the current **Aid Year** that is defined as an *Multi-Year* requirement and is *Complete,* the Process determines that student has satisfied the loan entrance counseling requirement and updates the *Unprocessed* COD Counseling transaction to *Processed.* The Loan Counseling record is not be updated.
>
> Example 2: A student has an existing Loan Entrance Counseling record for the prior **Aid Year** that is defined as an *Annual* requirement and is *Completed.* If the Process COD Counseling Data process is setup to *Insert/Update,* then a new loan counseling record for the current **Aid Year** (defined in the Run Control) is added.
>
> Example 3: A student has an existing Loan Entrance Counseling record for a prior **Aid Year** that is defined as a *Multi-Year* requirement and *is not* equal to *Completed.* If the Process COD Counseling Data process is setup to run *Insert/Update* or *Update Only,* then the existing record is updated with the date associated with the COD Counseling record being evaluated.

Managing Suspended COD Loan Counseling Records

Access the Manage COD Counseling Suspense page (**Financial Aid**, and then **File Management**, and then **Loan Counseling**, and then **Manage COD Counseling Suspense**).

This example illustrates the fields and controls on the Manage COD Counseling Suspense page. You can find definitions for the fields and controls later on this page.



Use this page to resolve suspended COD Counseling records.

Field or Control	Description
ID	Click the search icon to a page to search for a student ID to match to the COD loan counseling record.

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Field or Control	Description
Lock ID	Select to lock the selected ID to match to the suspended COD loan counseling record.
Process GradPLUS	For Entrance Counseling, select this option to update or insert a completion date for loan codes defined as Stafford *and* Graduate PLUS loan types when evaluating COD loan entrance counseling records of type DLPCounseling. The presence of a DLPCounseling type indicates that the student completed entrance counseling as a graduate student. If this option is selected, the DLPCounseling record is evaluated to determine if both the GradPLUS *and* Stafford loan entrance counseling requirements are met. If this option is not selected, the DLPCounseling record is evaluated *only* to determine if the Stafford loan entrance counseling requirement is met. For Exit Counseling, select this option to update the exit counseling as completed for Stafford *and* GradPLUS. If this option is not selected, the process will mark *only* the Stafford exit counseling requirement as being completed.
Use latest awarded Aid Year	Select this check box to direct the process to document the students' exit counseling completions to the most recent aid year for which the student has been awarded. This overrides the financial award year that is reported in the file in relation to exit counseling.
Skip/Done	Select this option and click the **Process** button to set the COD loan counseling record as *Processed.* This removes the COD loan counseling record from any future evaluation by the Process COD Counseling Data process. Once checked, all ID options are ignored and the record is set to *Processed* in the COD loan counseling staging table.
Process	Click this button to run the Process COD Counseling Data process for the selected COD loan counseling record.
Counseling Process Status	Displays the reason that the COD loan counseling record is suspended. • *Student Not found.* • *Multiple Student matches.* • *No Setup* – No setup for **Aid Year** being processed. • *No Stafford record found* – COD record evaluated for *Update Only,* but no existing Stafford loan counseling record exists. • *No Grad PLUS record found* – COD record evaluated for *Update Only,* but no existing Grad PLUS loan counseling record exists. • *No Aid Year* – Student is not Aid Year-activated for the **Aid Year** being processed.

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Processing NSLDS Loan Exit Counseling Data

Access the Process Exit Counseling Data page (**Financial Aid**, and then **File Management**, and then **Process Exit Counseling Data**).

The Process Exit Counseling Data process provides the option to import the Loan Exit Counseling Completion report records sourced from the National Student Loan Data System (NSLDS). This process incorporates the File Parser utility. As part of system data, File Mapping ID 'Exit Counseling Import' has been provided to support the import of the NSLDS Loan Exit Counseling Completion report formats: EXTC01 and EXTC05.

Field or Control	Description
Override OPEID and **OPEID**	Select the **Override OPEID** check box and an **OPEID** to process data for a single OPEID. If you do not select the check box, the process runs for all Active OPEID's mapped to the selected Institution.
Assign Aid Year	**Note:** NSLDS loan exit counseling data does not include an **Aid Year**. Select this check box and enter an **Aid Year** if you want to designate the Aid Year the processed loan exit counseling data is associated with. If you do not select an **Aid Year**, the process evaluates record STDNT_AWARDS to determine the most current **Aid Year** and use it to designate the Aid Year the processed loan exit counseling data is associated with.
Update/Insert Option	Select an Update/Insert Option. • *Insert/Update:* If there is no existing row for the Aid Year being used in the process, insert a new row. If there is an existing row for the Aid Year being used in the process, compare the **Date Completed**. If the new transaction's **Date Completed** is greater than the existing record's **Date Completed**, then insert the new transaction and move the existing record to History. When records are moved to History, a **History** hyperlink is displayed on the Manage Loan Counseling Data page. The **History** hyperlink is only created during the Process NSLDS Exit Loan Counseling process. • *Update Only:* If there is an existing row for the Aid Year being used in the process, the record is updated.
Process Grad PLUS	Select this option to update or insert an loan exit counseling completion date for the loan code defined as Stafford loan type and the loan code defined as the Graduate PLUS loan type. If this option is not selected, only the Stafford loan exit counseling requirement is evaluated.

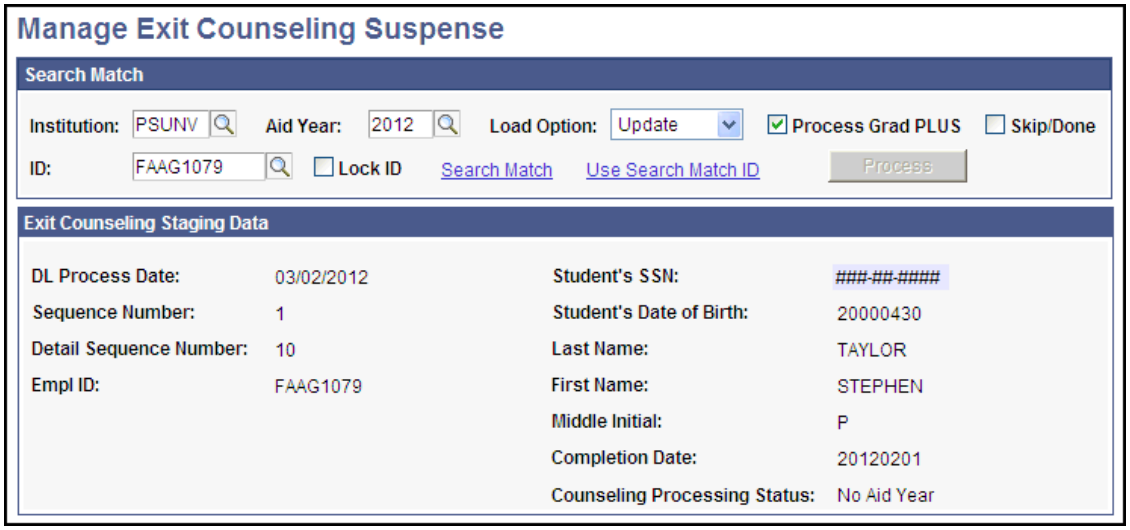
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Field or Control	Description
Selection Option	Use the **Selection Option** to choose whether you want to evaluate unprocessed NLSDS loan exit counseling records, suspended NSLDS loan exit counseling records, or both. *All:* Select this option to evaluate both Suspended and Unprocessed records. *Suspended Only:*Select this option to evaluate only Suspended records. *Unprocessed:*Select this option to evaluate only Unprocessed records.
File Mapping ID	Use the system-provided **File Mapping ID** '*Exit Counseling Import*'. This **File Mapping ID** has been specifically defined to map the NSLDS EXTC01 and EXTC05 Exit Loan Counseling report formats.

Managing Suspended NSLDS Loan Exit Counseling Records

Access the Manage Exit Counseling Suspense page (**Financial Aid**, and then **File Management**, and then **Loan Counseling**, and then **Manage Exit Counsel Suspense**).

This example illustrates the fields and controls on the Manage Exit Counseling Suspense page. You can find definitions for the fields and controls later on this page.



Use this page to resolve suspended NSLDS loan exit counseling records.

Field or Control	Description
Aid Year	Enter an **Aid Year**. An **Aid Year** value must be entered to execute the Process Exit Counseling Data process from this component.

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Field or Control	Description
Load Option	Select a Load Option. • *Insert/Update:* If there is no existing row for the Aid Year being used in the process, insert a new row. If there is an existing row for the Aid Year being used in the process, compare the **Date Completed**. If the new transaction's **Date Completed** is greater than the existing record's **Date Completed**, then insert the new transaction and move the existing record to History. When records are moved to History, a **History** hyperlink is displayed on the Manage Loan Counseling Data page. The **History** hyperlink is only created during the Process NSLDS Exit Loan Counseling process. • *Update Only:* If there is an existing row for the Aid Year being used in the process, the record is updated.
Process Grad PLUS	Select this option to update or insert an loan exit counseling completion date for the loan code defined as Stafford loan type and the loan code defined as the Graduate PLUS loan type. If this option is not selected, only the Stafford loan exit counseling requirement is evaluated.
Skip/Done	Select this option and click the **Process** button to set the NSLDS exit loan counseling record as *Processed.* This removes the NSLDS loan exit counseling record from any future evaluation by the Process Exit Counseling Data process. Once checked, all ID options are ignored and the record is set to *Processed* in the NSLDS loan exit counseling staging table.
ID	Click the search icon to a page to search for a student ID to match to the NLSDS loan exit counseling record.
Lock ID	Select to lock the selected ID to match to the suspended NSLDS loan exit counseling record.
Process	Click this button to run the Process Exit Counseling Data process for the selected NLSDS loan exit counseling record.

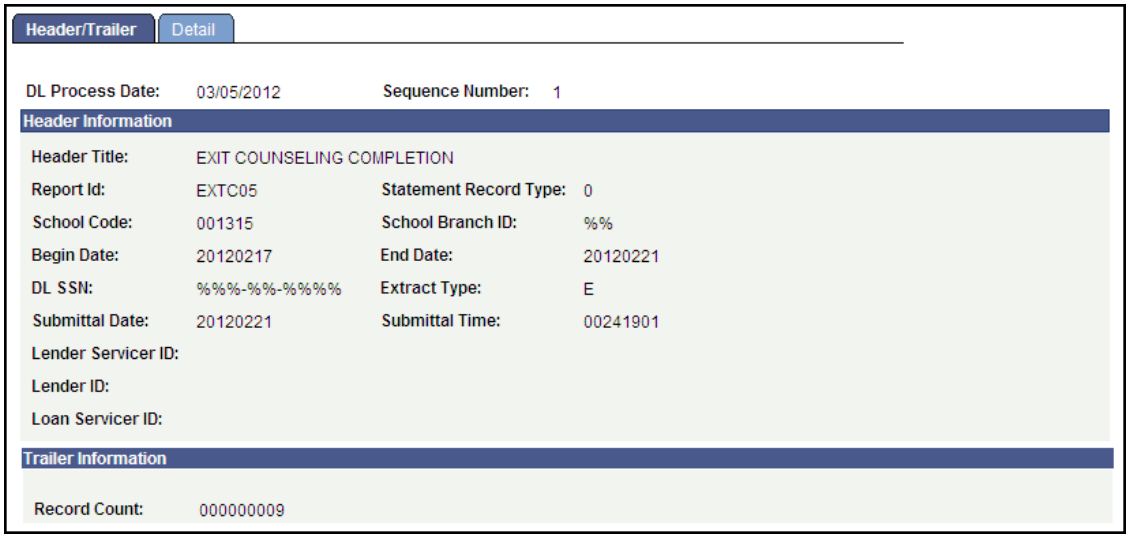
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Field or Control	Description
Counseling Process Status	Displays the reason that the NSLDS loan exit counseling record is suspended. • *Student Not found.* • *Multiple Student matches.* • *No Setup* – No setup for **Aid Year** being processed. • *No Stafford record found* – Stafford counseling records evaluated for *Update Only,* but no existing Stafford loan counseling record exists. • *No Grad PLUS record found* – PLUS counseling records evaluated for *Update Only,* but no existing Grad PLUS loan counseling record exists. • *No Aid Year* – Student is not Aid Year–activated for the **Aid Year** being processed.

Viewing NSLDS Loan Exit Counseling Staging Table Data

Access the View Exit Counseling Staging Header/Trailer page (**Financial Aid**, and then **File Management,**, and then **Loan Counseling**, and then **View Exit Counseling Staging**).

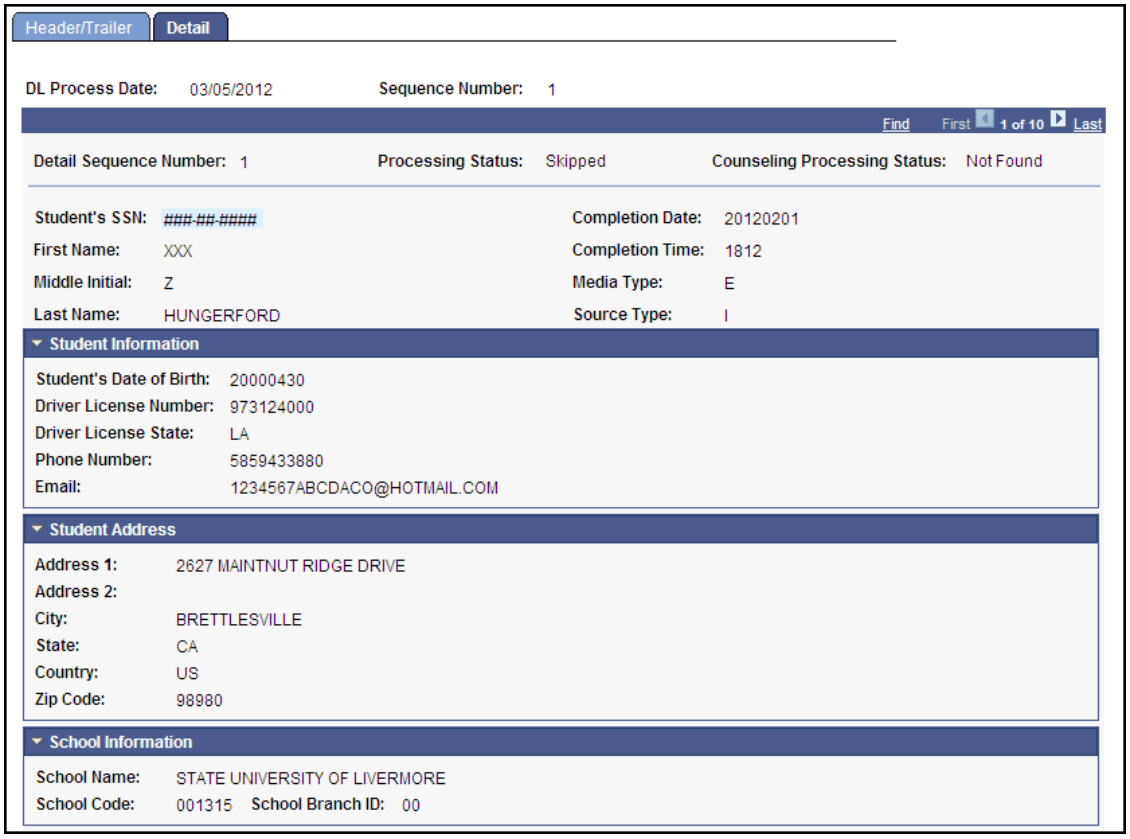
This example illustrates the fields on the Header/Trailer page.



Access the View Exit Counseling Staging Detail page (**Financial Aid**, and then **File Management**, and then **Loan Counseling**, and then **View Exit Counseling Staging**, and then **Detail tab**).

This example illustrates the fields on the View Exit Counseling Staging Detail page (1 of 2).

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This example illustrates the fields on the View Exit Counseling Staging Detail page (2 of 2).



Use the **View Exit Counseling Staging** component to view all Loan Exit Counseling data evaluated during the **Process Exit Counseling Data** process. Pages and sections support data based on the NSLDS report formats EXTC01 and EXTC05. Reports contain the school-related header and trailer details, student's demographic data including addresses for borrower, employer references, and next of kin data.

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39

Processing Pell Payments

Understanding Pell Payment Processing

This section discusses:

- Pell payment processing.
- Pell processing action codes.

Pell Payment Processing

The Pell payment process begins with the submission of an origination or origination and disbursement record for payment. You use origination data to verify a student's eligibility, identify possible conflicts with other institutions, and initiate disbursement record processing. After the origination record is received and processed, you can import an acknowledgment and response into the Campus Solutions system. The response contains the status, such as accepted, accepted with corrections, duplicate, or rejected.

Use the disbursement record to report a disbursement or expected disbursement for each student. After origination is accepted, you can process a disbursement record. If you send both records simultaneously, the system processes originations before disbursement.

Pell Processing Action Codes

This table lists Pell processing action codes:

Process Type	Pell Processing Status	Pell Transaction Status	Pell Origination Status	Pell Origination Action	Pell Disbursement Status	Action Code	Disbursement Detail
After award not originated	Pending	NA	NA	NA	NA	Blank	NA
Origination	Selected	Ready	Originated	Originated	Originated	Blank	Originated
Origination without Originate Offered Awards option checked.	Pending	NA	NA	NA	NA	Blank	NA
Outbound origination	Reported	Transmitted	Transmitted	Origination transmitted	Originated	Blank	Originated

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Process Type	Pell Processing Status	Pell Transaction Status	Pell Origination Status	Pell Origination Action	Pell Disbursement Status	Action Code	Disbursement Detail
Inbound origination with action code of A.	Reported	Ready	Accepted	Origination acknowledgment received.	Originated	Blank	Originated
Inbound origination with action code of C.	Reported	Ready	Corrected	Origination acknowledgment with corrections.	Originated	Blank	Originated
Inbound origination with action code of C and Pell setup Option is Hold Corrections.	Reported	On Hold	Corrected	Origination acknowledgment with corrections.	Originated	Blank	Originated
Inbound origination with action code of E.	Reported	On Hold	Rejected	Origination acknowledgment rejected.	Originated	Blank	Originated
Outbound disbursement	Reported	Transmitted	Accepted	Origination acknowledgment received.	Trans.	Blank	Disbursement transmitted
Inbound disbursement with action code of A.	Reported	Ready	Dep. on origination status.	Dep. on origination status.	Disbursed	Accepted	Disbursement acknowledgment
Inbound disbursement with action code of C.	Reported	Ready	Dep. on origination status.	Dep. on origination status.	Disbursed	Corrected	Disb. Acc with Corrections

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Process Type	Pell Processing Status	Pell Transaction Status	Pell Origination Status	Pell Origination Action	Pell Disbursement Status	Action Code	Disbursement Detail
Inbound disbursement with action code of C and Pell setup option is Hold Corrections.	Reported	On Hold	Dep. on origination status.	Dep. on origination status.	Disbursed	Corrected	Disb. Acc with Corrections
Inbound disbursement with action code of E.	Reported	On Hold	Dep. on origination status.	Dep. on origination status.	Rejected	Rejected	Disbursement rejected

Note

A corrected status shows a new row indicating that the corrected row was replaced. A rejected disbursement record enables the Resend button which resets the Pell disbursement status to *Originated.*

Creating Pell Origination Records

The origination record establishes a student's eligibility for a specific annual award of federal Pell Grant program funds. It includes the student's annual amount calculated by your institution and cost of attendance.

This section discusses how to generate Pell origination records.

Page Used to Create Pell Origination Records

Page Name	Definition Name	Navigation	Usage
Origination	RUNCTL_PELLORIG	**Financial Aid**, and then **Pell Payment**, and then **Originate Pell Payment**, and then **Origination**	Generate Pell origination records.

Generating Pell Origination Records

Access the Origination page (**Financial Aid**, and then **Pell Payment**, and then **Originate Pell Payment**, and then **Origination**).

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> **Note**
>
> Only *one* Selection Criterion can be selected: Population Selection *or* Student Override List.

Population Selection

Field or Control	Description
Population Selection	Select this check box to enable Population Selection for this process. A Population Selection Context Definition (Context Name = Pell Origination, Process Name = SFA_PELLORIG) is delivered for use with this process. PELL_ORIG_OVD_VW must be included in the PSQuery for it to appear on the Originate Pell Payment component when the Population Selection option is selected.
Selection Tool	Select *External File* or *PS Query*.
Query Name	Appears only when PS Query is selected. Select a population selection query that joins with the bind record SCCPU_STDNT_BND. PELL_ORIG_OVD_VW must also be included in the PSQuery for it to appear on the Originate Pell Payment component when the Population Selection option is selected.

Student Override List

Use this page to initiate the Pell Origination COBOL SQL process (FAPPLBLO). You can insert a new row to process additional students.

Field or Control	Description
Student Override	Select to originate a Pell Grant for an individual student or a select group of students.
ID	Select to process an individual student or a group of students. Only students who have been awarded Pell and have a Pell process status of pending appear in the values.

Managing Pell Origination

The origination process creates a unique ID for the student, sets the Pell processing status to selected, sets the Pell transaction status to ready, and displays the date and time that the process was run.

This section discusses how to:

- Review results of Pell origination.
- Review Pell processing status.
- Review Pell origination action detail.

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- Review Pell origination message detail.

Pages Used to Manage Pell Origination

Page Name	Definition Name	Navigation	Usage
Pell Origination	PELL_ORIG_1	**Financial Aid**, and then **Pell Payment**, and then **Manage Pell Payment**, and then **Pell Origination**	Review results of Pell origination including Workforce Pell eligibility for aid year 2026–2027 and later.
Pell Information	PELL_INFO_SEC	Click the **Pell Info** button on the Pell Origination page.	Review or change the Pell processing status.
Origination Ed Use Flags (origination education use flags)	PELL_ORG_EDUSE_SEC	Click the **Ed Flags** link on the Pell Origination page.	View notification that modifications have been made to your database.
Pell Orig Action Detail (Pell origination action detail)	PELL_ORIG_SEC	Click the **Orig Status** link on the Pell Origination page.	Review Pell origination action detail, including the ID, action sequence, and batch number.
Pell Orig Message Detail (Pell origination message detail)	PELL_ORIG_MSG_SEC	Click the **Origination Message** link on the Pell Orig Action Detail page.	Review Pell origination message detail.

Reviewing Results of Pell Origination

Access the Pell Origination page (**Financial Aid**, and then **Pell Payment**, and then **Manage Pell Payment**, and then **Pell Origination**).

Field or Control	Description
Pell Info (Pell information)	Click to access the Pell Information page to view or change the Pell processing status.
Orig Status (origination status)	Click to access the Pell Orig Action Detail page to view the Pell origination ID, action sequence, and batch number.
Update Pell Origination	Select to run origination again. This changes the Pell processing status back to pending. The origination process does not pick up anything with a status other than pending. The **Pell Trans Status** field must be set to *Ready* to run origination again.

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Field or Control	Description
Pell Transac Status (Pell transaction status)	Select a value to reset the status. Values are: *Review, On Hold, Ready, Transmitted,* and *Cancel.* For example, if you receive a rejected record, the Pell transaction status is set to *On Hold.* You can correct the record, change the status to *Ready,* and resend the origination. After the system has transmitted the record, this field is unavailable until you receive an acknowledgment of the process.
Pell Origination Status	Displays the Pell origination status when the system transmits records. Values are: *Accepted:* Indicates an accepted acknowledgment record. *Canceled:* Indicates a canceled Pell award from the system. Run origination again to resend. *Change to Origination:* Indicates that a change was made to the student's origination record. The origination build program sets this status after you run origination. This occurs if you cancel an award or if you select the student's record using the **Update Pell Origination** check box. *Corrected:* Indicates an accepted record with corrections. *Originated:* Indicates that the origination process ran successfully. *Rejected:* Indicates a rejected record. If the record is rejected, the system sets the processing status to *Review* and the transmitted status to *On Hold.* *Transmitted:* Indicates that a transmit record has been built and can be exported. A corresponding response record for the student must be received before you can run another process for the student. This includes running the origination build program, requesting an outbound of a subsequent origination record, or running the outbound disbursement process.

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Field or Control	Description
Pell MRR Status (multiple reporting record status)	Displays originations and disbursements reported by more than one institution for the same student. Use this information to identify and resolve potential over award payments and concurrent enrollments before they occur. When you request multiple reporting records and load them into the system, the status of the data updates this field. Values are: *Blocked Institution* *Blocked and Concurrent* *Blocker Institution* *Blocker/Concurrent Enrlm* (blocker and concurrent enrollment) *Concurrent Enrollment Institution* *Disbursed Institution* *None Found* *Originated Institution* *Shared SAR ID* (shared student aid report ID) *Unblocked Institution* *Verification W* (verification without documentation)

Org Detail

Field or Control	Description
Original SSN (original social security number)	Displays the student's social security number from the original Free Application for Federal Student Aid (FAFSA).
Name Code	Displays the student's name code from the original FAFSA. If the social security number and name code do not match the origination ID, the system rejects the record.
Attended Pell ID	Displays the Pell ID of the campus that the student is attending.
Action Code	Displays a code to indicate the status of an acknowledgment record. Values are: *A:* Accepted—all fields accepted. *C:* Corrected—one or more fields corrected. *D:* Duplicate. *E:* Rejected—record was rejected.
Total Pell	Displays the student's total award amount for the school year.

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Field or Control	Description
Additional Pell	Displays *Y* if the student has been awarded Pell Grant in an amount greater than 100% of their Scheduled Federal Pell Grant amount for the year. In the Pell outbound file, the Additional Eligibility Indicator displays as TRUE. Displays *N* if the student has *not* been awarded Pell Grant in an amount greater than 100% of their Scheduled Federal Pell Grant amount for the year *or* if the Pell Grant award has been canceled in its entirety for the year. In the Pell outbound file, the Additional Eligibility Indicator displays as FALSE. Only displayed for Aid Years 2010 through 2012 and 2018 and beyond.
Workforce Pell Eligible	For aid year 2026–2027 and later, this displays whether the student is enrolled in an eligible workforce program and is potentially eligible for Workforce Pell processing. Campus Solutions derives this value from SFA_ISIR_CONT.SFA_WF_PROG_IND and uses the following mappings in COD processing: • 1 = true • 2 = false • Blank indicates that no determination has been made.
ED Verification Status Code (department of education verification status code)	Displays the verification status of the applicant's data. Values are: *A:* Accurate *C:* Calculated *T:* Tolerance *R:* Reprocessed *V:* Verified *W:* Without documentation *S:* Selected but not verified Blank. **Note:** When the system builds origination, it builds the value defined on the student aid attribute record or Packaging Status Summary. When you outbound the data, the system sets the value to that required by the technical reference record layout. The system sets the values V, W, S, or Blank.

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Field or Control	Description
Enroll Stat (enrollment status)	**Note:** This field is hidden beginning with the 2018 Aid Year. Enrollment status information is available via the Pell Disbursement page. Not required to be reported. Displays the code that applies to the student's expected enrollment status for the award year. Values are: • *1:* Full-time • *2:* Three-quarter-time • *3:* Half-time • *4:* Less than half-time • *5:* No Load. This value is not evaluated for 2017 and earlier aid years.
SAI (student aid index)	**Note:** Applicable to the 2024-2025 and future Aid Years only. Displays the Student Aid Index.
Pell EFC (Pell expected family contribution)	**Note:** Applicable to the 2023-2024 and prior Aid Years only. Not required to be reported. Displays the student's EFC from the Institutional Student Information Record (ISIR) or Student Aid Report (SAR).
Sec EFC (secondary expected family contribution)	**Note:** Applicable to the 2023-2024 and prior Aid Years only. Displays a code to indicate which expected family contribution value is used to determine the award amount. Values are: *0:* Pell award was reported previously based on the secondary EFC. Award is now based on the original EFC. *S:* The Pell Grant award is based on the secondary EFC.
Citizen Ovrd (citizenship override)	Select to report a local override of the student's citizenship status. This field is display only when the record is transmitted, corrected, or acknowledged or when a Multiple Reporting Record file is loaded. Valid values are *Ineligible, NonCitizen* and, *US Citizen.*

Setup Info

Select the Setup Info tab.

Field or Control	Description
Pell Enroll Dt (Pell enrollment date)	Displays the first date on which the student was enrolled in an eligible program for the designated school year.

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Field or Control	Description
Low T&F Flag (low tuition and fees flag)	The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category as mandated by the Department of Education for each award year. Values are: *(none), O, Range 1, Range 2, Range 3,* and *Range 4.*
Trans Num (transaction number)	Displays the transaction number from an eligible ISIR or SAR used to calculate the award.
Pay Method	Not required to be reported. Displays the payment method formula.
Pell COA (Pell cost of attendance)	Displays the cost of attendance used to calculate the Pell award amount. It must equal the COA calculated by the institution following the Pell Grant payment regulations.
Sched Pell (schedule Pell)	Displays the maximum amount of the Pell award for which a student is eligible based on full-time enrollment. The student cannot exceed the scheduled Pell award amount.
Weeks Calc (weeks calculated)	Not required to be reported. Displays the number of weeks of instructional time in which the student is enrolled and paid, as part of the academic year or program as defined for each payment methodology.
Weeks Acad Yr (weeks academic year)	Not required to be reported. Displays the number of weeks of instructional time in the program's academic year.

Other Information

Select the Other Information tab.

Field or Control	Description
Hours Credits Paid	Not required to be reported. Displays the number of credit or clock hours that the student is expected to complete and receive payment.
Hours Credits in Acad Yr (hours credits in academic year)	Not required to be reported. Displays the number of hours or credits in the program’s academic year.
Acad Calender (academic calendar)	Not required to be reported. Indicates the calendar that applies to the student's educational program and determines which payment methodology is accepted. Credit hours with standard terms of quarters or credit hours with standard terms of semesters or trimesters are examples of academic calendars.
Ed Flags (department of education flags)	The system activates this link when a record is inbound. Click to view the education use flags from the inbound record. These are set to inform you of modifications that were made to your database. Education use flags are also activated when the record is rejected, and they require immediate action.

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Field or Control	Description
Prev ISIR Transac (previous institutional student information record transaction)	Displays the previous ISIR transaction, if a change has been made.
Prev EFC (previous expected family contribution)	Displays the previous expected family contribution, if a change has been made.
Prev Sec EFC Cd (previous secondary expected family contribution code)	Displays the previous secondary expected family contribution.
Prev COA (previous cost of attendance)	Displays the previous cost of attendance based on a change to the student's cost of attendance.
ATB (ability to benefit)	Displays a link to Ability to Benefit information if present. Click the link to view Ability to Benefit data. See Managing Ability to Benefit.

Reviewing Pell Processing Status

Access the Pell Information page (click the **Pell Info** button on the Pell Origination page).

The origination process defines the students for Pell payment processing, sets the Pell processing status to selected, sets the Pell transaction status to ready, and displays the date and time that the process was run. You can override the transaction after you originate, but you must do this before you run any outbound process.

Field or Control	Description
Pell Processing Status	Displays the Pell processing status. The system changes this field based on the process that you run for a student. Values are: *Pending:* When a student is awarded a Pell Grant, the system sets the status to pending, regardless of whether the award is in offer status or accepted status. When you run origination, the system looks for students whose status is set to pending and whose Pell Grant is accepted. *Reported:* When you outbound the Pell origination record, the system changes the status from selected to reported. *Send:* The system changes the status from pending to send if the process was successful.

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Field or Control	Description
Transaction Nbr (transaction number)	Select the transaction number. The system retrieves the latest effective-dated row for the student. You can override this by selecting the ISIR transaction number to originate. For example, if you have multiple official ISIRs for a student, you can select the ISIR transaction to send. If you know that the student is eligible for more Pell awards using a prior ISIR, you can enable the system to use that transaction instead of the last official one. **Note:** When you initially run Pell origination, the system retrieves the latest effective-dated row with an official EFC status for the student. After you originate, but before you run any outbound processes, you can override the transaction by selecting a value, setting the students' Pell processing status to pending and running origination again. The system reoriginates the record with the data from the selected transaction. The record includes the appropriate student identifier such as SSN, date of birth, and last name.
Effective Date	Select an effective date that matches the transaction number that you selected. For example, if a student has three official ISIRs, a transaction number is assigned to each effective date. If you decide to use transaction 2, select the effective date from the values with the matching transaction number.
Effective Sequence	Select an effective sequence that coincides with the ISIR transaction number and effective date.
Academic Career	Select the student's academic career defined by your institution.
Primary Academic Program	Select the primary academic program defined by your institution.
Academic Plan	Select the academic plan defined by your institution.
Pell Student Level Override	Select to override the payment information at the student level that you set up on the Payment Setup page.
Low T&F Flag (low tuition and fees flag)	The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category as mandated by the Department of Education for each award year. Values are: *(none),O,Range 1, Range 2, Range 3,* and *Range 4.*

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Field or Control	Description
Academic Calendar	Not required to be reported. Select the academic calendar type. Values are: *Clock Hour* *Crdt Hr NS* (credit hour nonstandard terms) *Quarter* *Semester* *Trimester* *Hr w/o Terms* (hour without terms)
Payment Methodology	Not required to be reported. Select the payment methodology or the formula used to calculate the student's Pell Grant award. Values are: *Formula 1, Formula 2, Formula 3, Formula 4, Formula 5*, and *(none).*
Hours/Credits in Acad Year (hours or credits in academic year)	Not required to be reported. Enter the number of hours or credits in the program's academic year.
Weeks in Program Acad Year (weeks in program academic year)	Not required to be reported. Enter the number of weeks of instructional time in the program's academic year.
Use Fulltime Enrollment	Select to use full-time enrollment. The system builds the field for all originated students using full-time enrollment, regardless of the student's actual enrollment. For example, if you select this check box and a student is enrolled part-time, the system reports the student as full-time. To report and originate a student as full-time with maximum Pell, you must also select the Originate Max Pell Award check box.
Originate Offered Awards	Select to originate Pell awards with an award status of offered. If this check box is cleared, the system only originates Pell awards when the award status is accepted.
Originate Max Pell Award (originate maximum Pell award)	Select to originate Pell awards based on the maximum Pell award defined on the Pell Payment Setup page. The system originates the maximum Pell amount regardless of how much the student was offered for the Pell award.

Reviewing Pell Origination Action Detail

Access the Pell Orig Action Detail page (click the **Orig Status** link on the Pell Origination page).

This page displays the history of the student's origination record. If the student's record has been originated, the system displays the status as originated. If the record has been transmitted, the system displays the status as transmitted. The system maintains a historical record of the action that you take when processing a student and increases the Pell origination sequence number for each action. The first sequence is when you originate the record, the second sequence is when you transmit the origination, and the third sequence is when the origination is received or acknowledged. If a change occurs to the origination record, the system inserts a new sequence with an appropriate description of the action.

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Field or Control	Description
Seq (sequence), **Code,** and **Date**	Displays the action sequence number, the description of the action, and the date and time that the action was performed. Whenever an action takes place that affects the student with regard to a process, the system inserts a row. For example, the system inserts a row for the outbound origination and for an origination.
User	Displays the name of the person who performed the action.
Origination Message	Click this link to access the Pell Origination Message Detail page, where you can view Pell origination action messages.

Viewing Pell Disbursement Data

This section discusses how to review Pell disbursement results.

Related Topics

- Understanding Pell Payment Processing

Page Used to View Pell Disbursement Data

Page Name	Definition Name	Navigation	Usage
Pell Disbursement	PELL_DISB_2	**Financial Aid**, and then **Pell Payment**, and then **Manage Pell Payment**, and then **Pell Disbursement**	Review Pell disbursement results.
GEPL Action Detail	SFA_PL_DISB_GE_ACT	Select **Disbursement Detail** on the Pell Disbursement page, then select **GEPL Action Detail**.	Review disbursement-level GEPL values, including Workforce Pell Tuition and Fees for aid year 2026–2027 and later.
COD Disbursement	SFA_COD_DISB	**Financial Aid** , and then **File Management** , and then **COD Full Participant** , and then **View COD Data** , and then **COD Disbursement**	View disbursement information, including disbursement amount and disbursement date. See Viewing Disbursement Information

Reviewing Pell Disbursement Results

Access the Pell Disbursement page (**Financial Aid**, and then **Pell Payment**, and then **Manage Pell Payment**, and then **Pell Disbursement**).

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Disbursement Detail

Field or Control	Description
Item Type	Displays the code for the financial aid item type.
Disbt ID (disbursement ID)	Indicates the ID number assigned to the disbursement record.
Pell Disbt Amount (Pell disbursement amount)	Displays the amount of the disbursement.
Pell Disbt Date	Displays the disbursement date that is set up in your system for the disbursement ID.
Pell Actual Disbt Date (Pell actual disbursement date)	When you select **Disb Prior to Transmitting Rec** on the Pell Institution Address page, this field displays the actual date that Pell was disbursed to the student's account.
Pell Disbt Status (Pell disbursement status)	Displays the Pell disbursement status, based on origination, disbursement, or any other outbound process. Values are: *Originated*, *Disbursed*, and *Transmitted*.
Action Code	Displays the action. The value is a result of the acknowledgment record. Values are: *Accepted:* All fields accepted. *Corrected:* One or more fields corrected. *Duplicate:* Duplicate record or field. *Rejected:* Record was rejected.
Pell YTD Dsbt (Pell year-to-date disbursements)	Displays the total year-to-date amount of Pell Grant disbursements received and accepted by your institution.
Incarcerated Student Code	Displays: • Y = Incarcerated, but eligible. • N = Not incarcerated.
Disbursement Detail	Click this link to view Pell Disbursement Action Detail page

Pell Disbursement Action Detail

Click the Disbursement Detail link.

The fields on this page function similarly to the fields on the Pell Orig Action Detail page, except for these elements:

Field or Control	Description
Document ID	Displays the document identification that the system assigns to each student receiving a Pell Grant.
GEPL Action Detail (gainful employment Pell action detail)	Click to view GEPL Action Detail page. For aid year 2026–2027 and later, **Workforce Pell Tuition & Fees** displays the Workforce Pell Tuition and Fees value for the disbursement when available.
Disbursement Messages	Click to view the Pell Disbursement Message Detail page.

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COD Info

Select the COD Info tab.

Field or Control	Description
Item Type	Displays the code for the financial aid item type
Disbt ID (disbursement ID)	Indicates the ID number assigned to the disbursement record.
COD Disbt Num (common origination and disbursement number)	Displays the disbursement number reported for a particular disbursement sequence.
COD Disbt Seq (common origination and disbursement sequence)	Displays the number that determines the order in which transactions must be processed for a particular disbursement number.
COD Disbt Amt(common origination and disbursement amount)	Displays the amount of funds credited or expected to be credited to a student's account.
Enrollment Intensity	**Note:** Applicable to the 2024-2025 and future Aid Years only. Displays the Enrollment Intensity percentage for this disbursement.
Enroll School Code (enrollment school code)	The Enrollment School Code represents the physical location of the student at the disbursement level. The Enrollment School Code reported is the OPEID of the Campus of the Financial Aid Term associated with the disbursement ID. • When the award is originated this field is blank and editable by default. • The Enrollment School Code can be overridden on the page or by Population Update for disbursements not yet reported to COD. • When a disbursement is transmitted to COD, the field becomes display only and is either *blank* to indicate that the setup value was used or displays the override value. See Defining Your Campus OPEID Codes.
GEPL Detail (gainful employment Pell action detail)	Click this link to access the GEPL Details page. You can enter override values in the **GEPL Value** fields on this page until Pell disbursement information is transmitted to COD. After transmission, the page is display-only. If override values are entered and transmitted, they appear in these fields after transmission. **GEPL Value** fields that are not overridden display blank after transmission. If you run in Validate only mode regardless if the fields were overridden, the Validated GEPL Value fields are populated and display with the Validated value. The **Transmitted GEPL Value** fields show the values transmitted to COD. From AY 2021 or later, you can override the CIP Code Year on this page. This information appears on the GEPL Action Detail page.

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Changing Career Statuses

This section provides an overview of changing career statuses and discusses how to change a student's career.

Understanding Changing Career Statuses

You change a student's Pell award based on changes in the student's career. For example, assume that after you award a student a Pell Grant using an undergraduate career for the year —fall and spring terms, the student changes to an undergraduate engineering career for the spring term. You must cancel the spring Pell under the undergraduate career and award the spring Pell again, this time with the undergraduate engineering career on the award entry page. You can then use the Pell Disb/Career page to make the change to the career for the spring term before running the origination process.

After you revise the student's Pell award, the system resets the Pell processing status to pending. However, because no changes have been made to the student's origination or disbursement detail, the origination process does *not* find this student. Career is not used by Pell for payment acceptance, so the system does not outbound this data.

If you do not correct the **Career** field after a career change, the system picks up the cancelled award under the old career, and if that award was disbursed, the Pell process returns a negative disbursement.

> **Note**
>
> You should correct the **Career** field after a career change. Otherwise, the system sends a disbursement request under the new career. This can result in confusion with the Department of Education, because you are simultaneously cancelling a disbursement and requesting a disbursement for the same disbursement period for the same student.

Page Used to Change Careers

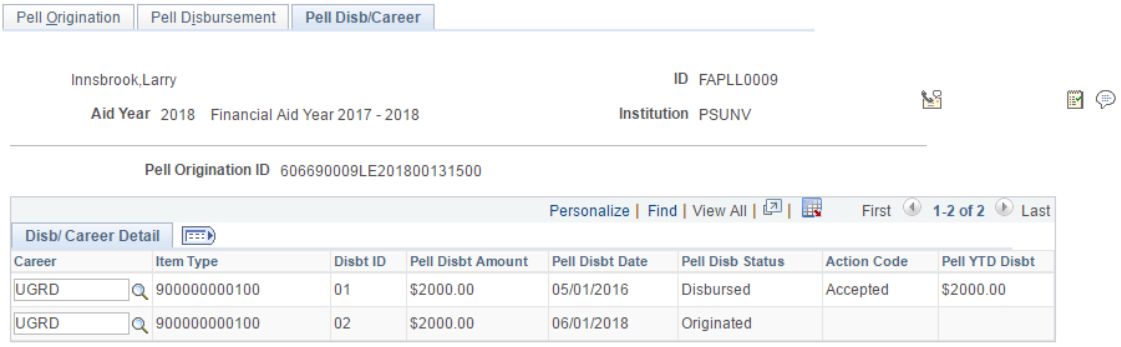
Page Name	Definition Name	Navigation	Usage
Pell Disb/Career (Pell disbursement and career)	PELL_DISB_1	**Financial Aid**, and then **Pell Payment**, and then **Manage Pell Payment**, and then **Pell Disb/Career**	Change a career on any disbursement row that was previously processed using an old career.

Changing a Student's Career

Access the Pell Disb/Career page (**Financial Aid**, and then **Pell Payment**, and then **Manage Pell Payment**, and then **Pell Disb/Career**).

This example illustrates the fields and controls on the Pell Disb/Career page: Disb/Career Detail tab. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Career	Displays the code that represents the type of academic work done by the student.
Item Type	Displays the code for the financial aid item type
Pell Dsbt Amount (Pell disbursement amount)	Displays the amount of the disbursement.
Pell Disb Status (Pell disbursement status)	Displays the Pell disbursement status based on the origination, disbursement, or any other outbound process. Values are: *Originated,* *Disbursed,* and *Transmitted.*
Action Code	Displays the action code, which indicates an action to be taken. The action code value is a result of the acknowledgment record. Values are: *A:* Accepted, all fields accepted. *C:* Corrected, one or more fields corrected. *D:* Duplicate. *E:* Rejected, record was rejected.
Pell YTD Dsbt (Pell year-to-date disbursed)	Displays the total year-to-date number of disbursements received and accepted by your institution.

Related Topics

- Reviewing COD Data for Pell Grants and Direct Loans
  The View COD Data component is used to view all COD data for all COD award programs supported by the system: Pell Grant and Direct Loan. The View COD Data component presents both inbound and outbound COD data.

Selecting Pell Data Request Types

This section provides an overview of Pell data requests and discusses how to select data requests.

Understanding Pell Data Requests

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

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After you select the type of data request and run the Pell Data Request process, you then run the Pell Out process to stage the data before generating an outbound file.

Pages Used to Create Pell Data Request Types

Page Name	Definition Name	Navigation	Usage
Pell Data Request	PELL_DATA_REQUEST	**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **Create Pell Data Request**, and then **Pell Data Request**	Select the type of data request that you want.
By Institution	PELL_DATA_INST_SEC	Click the **Institution** button on the Pell Data Request page.	Request multiple reporting from other institutions.
Year to Date Request IDs	PELL_DATA_ORIG_SEC	Click the **YTD Request ID** button on the Pell Data Request page.	List students for whom to review year-to-date data.
By Student	PELL_DATA_STDT_SEC	Click the **Student** button on the Pell Data Request page.	Request multiple reporting by student.

Selecting Data Requests

Access the Pell Data Request page (**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **Create Pell Data Request**, and then **Pell Data Request**).

Field or Control	Description
Request Type	Select the request type. Values are: *Multiple Reporting:* Select for multiple reporting information. *Reconciliation Request:* Select for reconciliation information. *Statement of Account:* Select to receive your funding levels and transactions with GAPS. *Year-to-Date:* Select to receive a summary of how many originations and disbursements were sent out and how many rejections and message codes you received based on year-to-date. You can run multiple requests. Insert a row for the next request and select the type. Each record consists of one request with a header and a trailer.
Multiple Report Request Code 1 (multiple reporting request code 1)	Select *Disbursed Records* or *Originated Records*. For example, to determine whether a student or all of your students are conflicting with other schools, you can base the request on disbursements to see if another school has disbursed to a student.

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Field or Control	Description
Multiple Report Request Code 2 (multiple reporting request code 2)	Select *All Students, Selected Institution,* or *Selected Students.* To determine whether a student or all of your students are conflicting with other schools, you can base the request on disbursements to see if another school has disbursed aid to a student.
Reset	Click to refresh the page and to display the **Multiple Report Request Code 1** and **Multiple Report Request Code 2** fields.
Institution, YTD Request ID (year-to-date request ID), and **Student**	These fields are available depending on the criteria that you set in the **Request Type, Multiple Report Request Code 1,** and **Multiple Report Request 2** fields. For example, if you select *Multiple Reporting* as the request type, *Disbursed Records* or *Originated Records* as the multiple report request code 1, and *Selected Students* as the multiple report request code 2, then the **Student** field is available. If you select *Selected Institution* as the multiple report request code 2, then the **Institution** field is available. If you select *Year-to-Date* as the request type, then the **YTD Request ID** field is available. Click **Institution** to request multiple reporting from other institutions. You can select the institution for which you are requesting data. Click **YTD Request ID** to list students for whom you want year-to-date data. Click **Student** to request multiple reporting by student.

Sending Pell Data Requests

This section discusses how to send Pell data requests.

Pages Used to Send Pell Data Requests

Page Name	Definition Name	Navigation	Usage
Pell Out	RUNCTL_PELLOUT0	**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **Generate Pell Data Request**, and then **Pell Out**	Create and populate request for data in the outbound staging table.
FA Outbound	RUNCTL_FA_OUT	**Financial Aid**, and then **File Management**, and then **Create Federal Data Files**, and then **FA Outbound**	Generate outbound files.

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Selecting Outbound Pell Data Requests

Access the Pell Out page (**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **Generate Pell Data Request**, and then **Pell Out**).

Running this process populates the staging table with your data request.

Field or Control	Description
Pell Data Request Outbound	Select this check box to move Pell data request records to the staging tables where the flat files are created.

Save the page. Then click the Run button to initiate the Pell Outbound Driver process (FAPP0DRO) to move the selected files from the database to the staging tables.

Verifying Outbound Pell Data Requests

You can review data in the staging tables for Pell data requests and make corrections before sending these records.

This section discusses how to review Pell data requests.

Pages Used to Verify Outbound Pell Data Requests

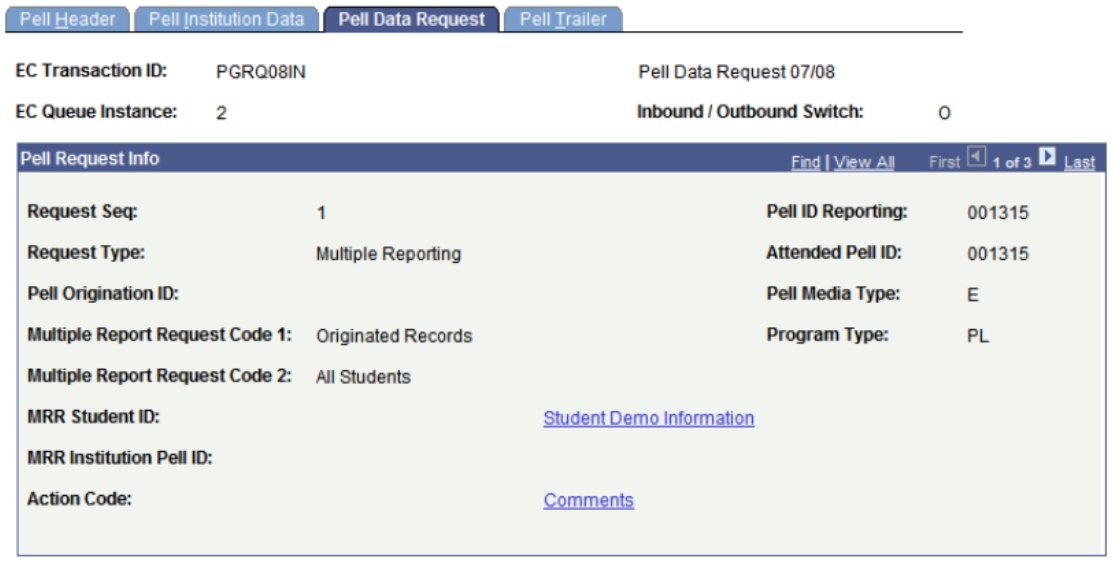
Page Name	Definition Name	Navigation	Usage
Pell Header	PELL_HEADER_00	**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **View Pell Data Request**, and then **Pell Header**	View Pell data requests.
Pell Data Request	PELL_DREQ_00	**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **View Pell Data Request**, and then **Pell Data Request**	Review Pell data requests.
Pell Trailer	PELL_TRAILER_00	**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **View Pell Data Request**, and then **Pell Trailer**	View the data that is reported and accepted from the inbound batch.

Reviewing Outbound Pell Data Requests

Access the Pell Data Request page (**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **View Pell Data Request**, and then **Pell Data Request**).

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This example illustrates the fields and controls on the Pell Data Request page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Request Seq (request sequence)	Displays the number of times that the data request was run.
Request Type	Displays a code identifying the type of request. Values are: *Multiple reporting* *Statement of account* *Year-to-date* *Reconciliation*
Multiple Report Request Code 1 (multiple reporting request code 1)	Indicates whether the institution is requesting originated or disbursed institutions. Values are: *Originated Records* or *Disbursed Records.*
Multiple Report Request Code 2 (multiple reporting request code 2)	Indicates whether the institution is requesting by selected student, selected institution, or all students. Values are: *All Students, Selected Students,* and *Selected Institutions.*
MRR Student ID (multiple reporting record student ID)	Displays the student's social security number and name code for which a multiple report is requested.
MRR Institution Pell ID (multiple reporting record institution Pell ID)	Displays the code for which multiple report listings are requested.
Pell ID Reporting	Displays the ID of the reporting institution.
Attended Pell ID	Displays the attending campus ID code assigned to your institution by the Department of Education.
Pell Media Type	Displays the code for the type of tape to use when sending output data. This is available for aid years prior to 2001. *E:* Send output by electronic file

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Field or Control	Description
Student Demo Information	Click to view the student's first name, last name, middle initial, date of birth, and social security number.
Comments	Click to view the message codes on the Pell Data Request Comment page.

Generating Outbound Pell Data Requests

Page Used for Generating Outbound Pell Data Requests

Page Name	Definition Name	Navigation	Usage
FA EC File Outbound	RUNCTL_FA_OUT	**Financial Aid**, and then **File Management**, and then **Create Federal Data Files**, and then **FA EC File Outbound**	Run this process to generate a data request file for submission to COD.

Generate the Outbound Pell Data Request

Running this process generates a data request file for submission to COD.

Access the FA EC File Outbound page (**Financial Aid**, and then **File Management**, and then **Create Federal Data Files**, and then **FA EC File Outbound**.

Field or Control	Description
Outbound File Path	Enter the path where the file is to be stored.
Aid Year	Select the aid year for which to run the process.
Institution	Select the institution for which to run the process.

Receiving Inbound Pell Data Requests

This section discusses how to import Pell data requests.

Pages Used to Receive Inbound Pell Data Requests

Page Name	Definition Name	Navigation	Usage
FA Inbound	RUNCTL_FA_INBOUND	**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**	Load inbound data request files from COD to staging tables.

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Page Name	Definition Name	Navigation	Usage
Pell Process In	RUNCTL_PELLIN0	**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **Import Pell Multiple Reporting**, and then **Pell Process In**	Move data from the staging tables to the database.

Loading Pell Acknowledgment Files

Navigation:

Access the FA Inbound page (**Financial Aid**, and then **File Management**, and then **Import Federal Data Files**, and then **FA Inbound**).

The system provides two run options on the FA Inbound page: Single File and File List.

Field or Control	Description
Run Option	Select one of the following run options: • *Single File*: The FA Inbound process expects the file listed in the Inbound File field to be one of the supported EDI files. • *File List*: The FA Inbound process expects the file listed in the Inbound File field to be a list of files to be processed. The default option is *Single File*.

Moving a Pell Data Request to the Database

Navigation:

Access the Pell Process In page (**Financial Aid**, and then **File Management**, and then **Pell Grants**, and then **Import Pell Multiple Reporting**, and then **Pell Process In**).

Use this page to run the Pell Inbound Driver COBOL SQL process (FAPPIDRO).

Field or Control	Description
Pell Multiple Reporting Record	Select to inbound any MRRs previously requested by more than one institution for the same student. This process is required only for MRR data requests.

Verifying Inbound Pell Data Requests

COD sends report files based on the data request files submitted by the institution for Multiple Reporting, Statement of Account, Year-To-Date and Reconciliation. Use the FA Inbound process (RUNCTL_FA_INBOUND) to load these files into their respective staging tables. The FA Inbound process determines the type of file based on the content of the Batch ID field in the header. Importing the Multiple Report Request requires running Import Pell Multiple Reporting Data for load completion. Use the provided inquiry pages to view the file data. Use the search

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

After you request origination, disbursement, multiple reporting, statement of account, or year-to-date acknowledgment files, you can view the data received before loading the files to the database.

For detailed information about inbound data from COD:

See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference*

Pages Used to Verify Inbound Pell Data Requests

Page Name	Definition Name	Navigation	Usage
Pell Header	PELL_HEADER_00	• **Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Review Statement of Account**, and then **Pell Header** • **Financial Aid**, and then **Pell Payment**, and then **Multiple Reporting**, and then **Review MRR**, and then **Pell Header** • **Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Review Reconciliation**, and then **Pell Header** • **Financial Aid**, and then **Pell Payment**, and then **Year to Date Reports**, and then **Review YTD Records**, and then **Pell Header**	View the values from the inbound process.

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Page Name	Definition Name	Navigation	Usage
Pell Statement of Acct Summ (Pell statement of account summary)	PELL_SAR_00	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Review Statement of Account**, and then **Pell Statement of Acct Summ**	Review statement of account summary and GAPS information.
Pell Statement of Acct Detail (Pell statement of account detail)	PELL_SARD_00	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Review Statement of Account**, and then **Pell Statement of Acct Detail**	Review statement of account detail, including data about adjustment amount, report date, process date, batch number, and adjustment description.
Pell Multiple Report	PELL_MRR_00	**Financial Aid**, and then **Pell Payment**, and then **Multiple Reporting**, and then **Review MRR**, and then **Pell Multiple Report**	Review multiple reporting data for students for whom you originate awards and who might also have awards originated at other institutions.
Pell MRR Institution Info	PELL_MRR_00_INST	**Financial Aid**, and then **Pell Payment**, and then **Multiple Reporting**, and then **Review MRR**, and then **Pell MRR Institution Info**	View demographic and financial aid administrator data.
Pell YTD Originations (Pell year-to-date originations)	PELL_YTDORG_00	**Financial Aid**, and then **Pell Payment**, and then **Year to Date Report**, and then **Review YTD Records**, and then **Pell YTD Originations**	Review Pell year-to-date originations.
Student Demo Information	PELL_STDT_YTD_SEC	Click the **Student Demo Information** link on the Pell YTD Originations page.	View the student's name, date of birth, and SSN.
Estimated Disbursement Dates	PELL_YTDORG_00_SEC	Click the **Estimated Disbursement** link on the Pell YTD Originations page.	View approximate disbursement dates.
Pell YTD Disbursements (Pell year-to-date disbursements)	PELL_YTDSB_00	**Financial Aid**, and then **Pell Payment**, and then **Year to Date Reports**, and then **Review YTD Records**, and then **Pell YTD Disbursements**	Review Pell year-to-date disbursements.

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Page Name	Definition Name	Navigation	Usage
Pell YTD Summary (Pell year-to-date summary)	PELL_YTDSUM_00	**Financial Aid**, and then **Pell Payment**, and then **Year to Date Reports**, and then **Review YTD Records**, and then **Pell YTD Summary**	Review Pell year-to-date summary of originations and disbursements.
Comment Code	PELL_YTDSUM_00_SEC	Click the **Comment Codes**link on the Pell YTD Summary page.	View the number of times that a comment code was returned to your institution on an acknowledgment.
Pell Reconciliation	PELL_RECON_00	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Review Reconciliation**, and then **Pell Reconciliation**	Review Pell reconciliation records. Reconcile the total disbursement amount per student.
Pell Trailer	PELL_TRAILER_00	• **Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Pell Statement of Acct**, and then **Pell Trailer** • **Financial Aid**, and then **Pell Payment**, and then **Multiple Reporting**, and then **Review MRR**, and then **Pell Trailer** • **Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Review Reconciliation**, and then **Pell Trailer** • **Financial Aid**, and then **Pell Payment**, and then **Year to Date Reports**, and then **Review YTD Records**, and then **Pell Trailer**	View inbound data.

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Importing Pell Grant Reports

This section discusses how to:

- Import and Review Lifetime Eligibility Used (LEU) files.
- Import and Review School Account Statement (SAS) and SAS Disbursement on Demand files.

Warning

This report functionality utilizes File Parser back-end processing to import grant header, report detail, and grant trailer data into the system. The delivered Context Definitions and File Mappings should not be changed.

Important

For detailed information regarding data received from Common Origination and Disbursement in these reports, reference the latest COD Technical Reference from the U.S. Department of Education.

Pages Used to Import Pell Grant Reports

Page Name	Definition Name	Navigation	Usage
Import Pell LEU Files (import pell lifetime eligibility used files)	SFA_PG_LEU_IMP	**Financial Aid**, and then **Pell Payment**, and then **LEU Reports**, and then **Import Pell LEU Files**	Import Pell Lifetime Eligibility Used files.
Review Pell LEU Records (review pell lifetime eligibility used records)	SFA_PG_LEU_HDR	**Financial Aid**, and then **Pell Payment**, and then **LEU Reports**, and then **Review Pell LEU Records**	Review a display of Pell Lifetime Eligibility Used information.
Generate Pell LEU Reports (generate pell lifetime eligibility used reports)	SFA_PG_LEU_RUN	**Financial Aid**, and then **Pell Payment**, and then **LEU Reports**, and then **Generate Pell LEU Reports**	Create a PDF of Pell Lifetime Eligibility Used report information.
Import SAS Files (import school account statement files)	SFA_PG_SAS_IMP	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Import SAS Files**	Import SAS and SAS Disbursement on Demand files.

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Page Name	Definition Name	Navigation	Usage
Review Pell SAS Summary (review pell school account statement summary)	SFA_PG_SAS_HDR	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Review Pell SAS Summary**	Review a display of Pell SAS Summary information.
Generate SAS Reports (generate school account statement reports)	SFA_PG_SAS_RUN	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Generate SAS Reports**	Create a PDF of Pell SAS report information.
Review Pell SAS DOD Summary (review pell school account statement disbursement on demand summary)	SFA_PG_SASOD_HDR	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Review Pell SAS DOD Summary**	Review a display of Pell Disbursement on Demand Summary information.
Generate SAS DOD Reports (generate school account statement disbursement on demand reports)	SFA_PG_RUN_DOD	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Generate SAS DOD Reports**	Create a PDF of Pell Disbursement on Demand report information.

Importing and Reviewing Lifetime Eligibility Used (LEU) Files

Importing Pell LEU Files

Access the Import Pell LEU Files page (**Financial Aid**, and then **Pell Payment**, and then **LEU Reports**, and then **Import Pell LEU Files**).

Use the run control page to import Pell Lifetime Eligibility Used files from Common Origination and Disbursement (COD).

Field or Control	Description
File Mapping ID	Select *Pell LE Import*. The Pell Lifetime Eligibility Report identifies Pell eligible CPS/FPS applicants for the award year that are approaching or have exceeded the 600.000% LEU limit. Records displayed on the Pell Lifetime Eligibility Used report are a snapshot of data on the COD System as of the report run time.

Review Pell LEU Records

Access the Review Pell SAS Summary page (**Financial Aid**, and then **Pell Payment**, and then **LEU Reports**, and then **Review Pell LEU Records**).

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This page displays data import detail for Pell LEU Records.

> **Important**
>
> For detailed information regarding data received from Common Origination and Disbursement in these reports, reference the latest COD Technical Reference from the U.S. Department of Education.

Generate Pell LEU Reports

Access the Generate Pell LEU Reports page (**Financial Aid**, and then **Pell Payment**, and then **LEU Reports**, and then **Generate Pell LEU Reports**).

This page creates a PDF file of the Pell LEU reports.

> **Important**
>
> For detailed information regarding data received from Common Origination and Disbursement in these reports, reference the latest COD Technical Reference from the U.S. Department of Education.

Importing and Reviewing School Account Statement (SAS) and SAS Disbursement on Demand Files

Importing SAS Files

Access the Import SAS Files page (**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Import SAS Files**).

Use the run control page to select and import SAS and SAS Disbursement on Demand files from Common Origination and Disbursement (COD).

Field or Control	Description
File Mapping ID	Select one: • *Pell SAS Import*: A monthly statement, similar to a bank statement, which summarizes your school's processing activity for that month and/or Year-to-Date (YTD). This statement can be used as a reconciliation tool to compare to both your financial aid and business office records. • *Pell SAS On Demand Import*: An on-demand report retrieved from requests made through the Reports Request page on the COD Website. The report is limited to the Disbursement Level Detail Section.

Review Pell SAS Summary

Access the Review Pell SAS Summary page (**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Review Pell SAS Summary**).

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This page displays data import detail for Cash Summary, Cash Detail, Disbursement Level, or Award Level information contained in the report provided by COD. Disbursement Level and Award Level display depends on school report option setup with COD. Award Level reporting is only available to schools that elect to receive YTD reports. If a school elects to receive both YTD Disbursement Level and Award Level the reports will come in separate message classes.

> **Important**
>
> For detailed information regarding data received from Common Origination and Disbursement in these reports, reference the latest COD Technical Reference from the U.S. Department of Education.

Generate SAS Reports

Access the Generate SAS Reports page (**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Generate SAS Reports**).

This page creates a PDF file of the Pell SAS YTD, Monthly, or YTD Award Level reports.

> **Important**
>
> For detailed information regarding data received from Common Origination and Disbursement in these reports, reference the latest COD Technical Reference from the U.S. Department of Education.

Review Pell SAS DOD Summary

Access the Review Pell SAS DOD Summary page (**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Review Pell SAS DOD Summary**).

This page displays an on-demand report retrieved from requests made through the Reports Request page on the COD Website. The report is limited to the Disbursement Level Detail Section.

> **Important**
>
> For detailed information regarding data received from Common Origination and Disbursement in these reports, reference the latest COD Technical Reference from the U.S. Department of Education.

Generate SAS DOD Reports

Access the Generate SAS DOD Reports page (**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **SAS Reports**, and then **Generate SAS DOD Reports**).

This page creates a PDF file of the Pell SAS DOD report.

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> **Important**
>
> For detailed information regarding data received from Common Origination and Disbursement in these reports, reference the latest COD Technical Reference from the U.S. Department of Education.

Tracking Requests for Funds From GAPS

This section discusses how to:

- Review requests for funds from GAPS.
- Manage item type detail.
- Enter cash transaction notes.

Pages Used to Track Requests for Funds From GAPS

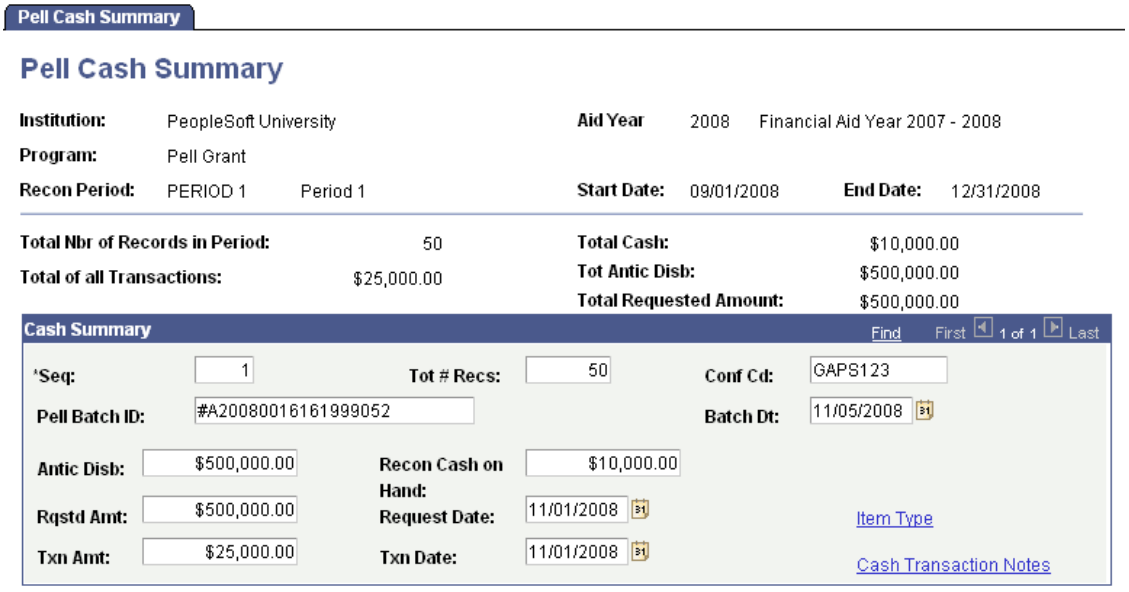
Page Name	Definition Name	Navigation	Usage
Pell Cash Summary	PROG_CASH_SUMM_PG	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Cash Summary**, and then **Pell Cash Summary**	Track requests for funds from GAPS. Enter applicable cash management detail.
Item Type	PRG_CSH_ITM_PG_SEC	Click the **Item Type** button on the Pell Cash Summary page.	Manage item type detail. Enter specific item type information for this cash summary. This enables you to divide each cash summary into the item types for which it is associated.
Cash Transaction Notes	PROG_CSH_NT_PG_SEC	Click the **Cash Txn Notes** button on the Pell Cash Summary page.	Enter cash transaction notes specific to this cash summary detail.

Reviewing Requests for Funds From GAPS

Access the Pell Cash Summary page (**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Cash Summary**, and then **Pell Cash Summary**).

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

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Field or Control	Description
Total Nbr of Records in Period (total number of records in period)	Displays the total number of cash summary detail records included in this reconciliation period.
Total of all Transactions	Displays the total of all the transaction amounts for this reconciliation period for each cash summary detail record.
Total Cash	Displays the total of all cash on hand amounts for this reconciliation period for each cash summary detail record.
Tot Antic Disb (total anticipated disbursement)	Displays the total of all anticipated disbursement amounts for this reconciliation period for each cash summary detail record.
Total Requested Amount	Displays the total of all requested amounts for this reconciliation period for each cash summary detail record.

Cash Summary

Field or Control	Description
Seq (sequence)	Displays a number that increases each time that you insert a new row. The sequence counts each cash summary detail record in this reconciliation period.
Tot # Recs (total number of records)	Indicates the total number of records in the reconciliation period. You can change this number to correct a mismatch with the data.
Conf Cd (confirmation code)	Displays the confirmation code for this cash drawdown request, which is received from GAPS.
Pell Batch ID	Displays the batch ID associated with this cash summary detail.

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Field or Control	Description
Batch Dt (batch date)	Displays the date on which the batch was created. This is recorded when you run outbound disbursements.
Antic Disb (anticipated disbursement)	Displays the amount that you anticipate to disburse to students for Pell Grants during the reconciliation period.
Recon Cash on Hand (reconciliation cash on hand)	Displays the amount of cash that you have on hand.
Rqstd Amt (requested amount)	Displays the amount of money that you requested for this disbursement period. The requested amount typically equals the anticipated disbursement minus your cash on hand.
Request Date	Displays the date on which you request the amount.
Txn Amt (transaction amount)	Displays the amount of the transaction for this request.
Txn Date (transaction date)	Displays the date on which this cash summary detail occurred.
Item Type	Click to enter specific item type information for this cash summary. You can divide each cash summary into the item types with which it is associated.
Cash Transaction Notes	Click to enter comments specific to this cash summary detail.

Managing Item Type Detail

Access the Item Type page (click the **Item Type** button on the Pell Cash Summary page).

Select an item type. Edit the other fields as needed. The system updates the **User** and **Cash Action Datetime** (cash action date and time) fields when you insert a new row.

Entering Cash Transaction Notes

Access the Cash Transaction Notes page (click the **Cash Txn Notes** button on the Pell Cash Summary page).

Field or Control	Description
Note Seq (note sequence)	Displays a number that increases each time that you add a row for a new note. The system updates the **User** and **Cash Action Datetime** (cash action date and time) fields when you insert a new row.
Note Text	Enter comments about the requests that you made. For example, you can enter a notation about sending a memo to the main accounting office requesting an electronic funds transfer.

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40

Using Perkins MPN Functionality

Understanding Perkins MPN Functionality

Regulatory changes require that institutions must use the Perkins MPN for new Perkins loans and for former National Direct Student Loan borrowers made on or after November 1, 2004. The Perkins MPN functionality enables institutions to participate as an annual MPN or multi-year MPN school by tracking a signed MPN before a student can receive any Perkins loan funds. For the annual MPN, the borrower is required to sign a note once each award year for all loans made for that award year. For a multi-year MPN, the borrower signs a note once for all loans made until that note expires at your institution.

In addition to providing annual or multi-year options, the system provides institutions the means to offer students the option of completing and signing an electronic Perkins MPN (eMPN). Campus Solutions Self Service provides students multiple entry points to begin the process to complete and electronically sign the Perkins MPN. Perkins MPN notifications and disclosures are incorporated into the Perkins electronic MPN process. The Perkins eMPN process incorporates the guidance and recommendations in accordance with the Department of Education Federal Student Aid.

The system provides a way to track the date that the MPN was signed by the borrower, the date that the MPN was received by the school, the date that the school received a request from the student to cancel an MPN, and the expiration date. Schools can close the status of the expiration date on the Perkins MPN record if they receive a written request from the student to cancel additional multi-year MPN loans.

Schools can print and track Perkins MPNs by groups, career, or for a single student. They can control printing of MPNs at the time of award notification (offered award status) or after the student has accepted their Perkins loan award. They can select a sort order when printing for large groups of students. The print MPN process utilizes the Forms Engine routine.

The disbursement authorization process accommodates the Perkins MPN record and process, but you must ensure that the MPN requirement flag is set at the financial aid item type level. For the financial aid item types that are flagged, the disbursement authorization process assesses whether or not a student with a Perkins Loan award satisfies the MPN requirement.

> **Note**
>
> This process does not require a checklist to be established for funds to be disbursed. See "Changes to Authorization and Disbursement for Perkins MPN Awards" in this document.

Determining a Valid Perkins MPN

The Perkins eMPN self-service process, print Perkins MPN process, and disbursement authorization process all need to determine whether a student who is awarded a financial aid item type with the MPN required flag has a valid Perkins MPN on file to proceed. Each process

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determines whether a valid Perkins MPN is on file for the student by first checking for the type of MPN. If it is a multi-year note or an annual note, and is signed and not expired, the process determines that a valid MPN exists. If it is a multi-year or annual note and is signed but expired, the process determines that a valid MPN does not exist and proceeds appropriately. The expiration date is based on any one of the following:

- The date that the institution receives the borrower's written request for no additional MPN loans.
- Twelve months after the signature date if no disbursements were made under that MPN.
- Ten years after the signature date or the date of institution's receipt of MPN.

Printing the Perkins MPN

This process utilizes the Forms Engine routine. The Forms Engine's primary function is to enable high speed and high volume printing to PostScript printers. The print Perkins MPN process sends the student data directly to the printer, which prints out to the Perkins MPN form layout, based on the department approved note, dated August 2003. This section discusses how to print the Perkins MPN.

Page Used to Print Perkins MPN

Page Name	Definition Name	Navigation	Usage
Print Perkins Master Promissory Note	SFA_RUN_PERK_MPN	**Financial Aid**, and then **Loans**, and then **Print Perkins MPN**, and then **Print Perkins Master Promissory Note**	Generate the Perkins MPN.

Printing the Perkins MPN

Access the Print Perkins Master Promissory Note page (**Financial Aid**, and then **Loans**, and then **Print Perkins MPN**, and then **Print Perkins Master Promissory Note**).

Field or Control	Description
Sort by	Select from the following to determine the order that the system prints the MPN: *ID:* Select to print by student EmplID. *Name:* Select to print by student names. The order is last name, first name, middle initial. *SSN:* Select to print by student social security numbers.
Printer Name	Select the printer for which you want to print the MPN. See Using Forms Engine for more information about defining printers.
Print Via Script	Select to allow for multi-platform printing. See Using Forms Engine for more information about defining printers.

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Field or Control	Description
Student Override	Select this check box and an individual student ID to print a Perkins MPN. The search result only displays students with a financial aid item type with the MPN Required flag and an award status of *Offer* or *Accept*. The process does not allow you to select students who at a minimum do not have an offered Perkins financial aid item type with the **MPN Required** check box selected on the FA Item Type 1 page.

Tracking Perkins MPN Information

This section provides an overview of Perkins MPN information and discusses how to:

- View Perkins MPN information.
- Review and enter data.
- Review and enter references.

Understanding Tracking Perkins MPN Information

The Perkins MPN record tracks and records key dates and information. The system creates a Perkins MPN record if a student has been awarded a financial aid item type with the MPN Required flag and under the following conditions:

1. The MPN format is electronic and the student has completed and electronically signed the Perkins MPN.
2. A paper MPN has been generated. You can generate paper MPNs in batch by running the Print Perkins MPN process or a student can request a paper MPN within the eMPN process.

Pages Used to Track Perkins MPN Information

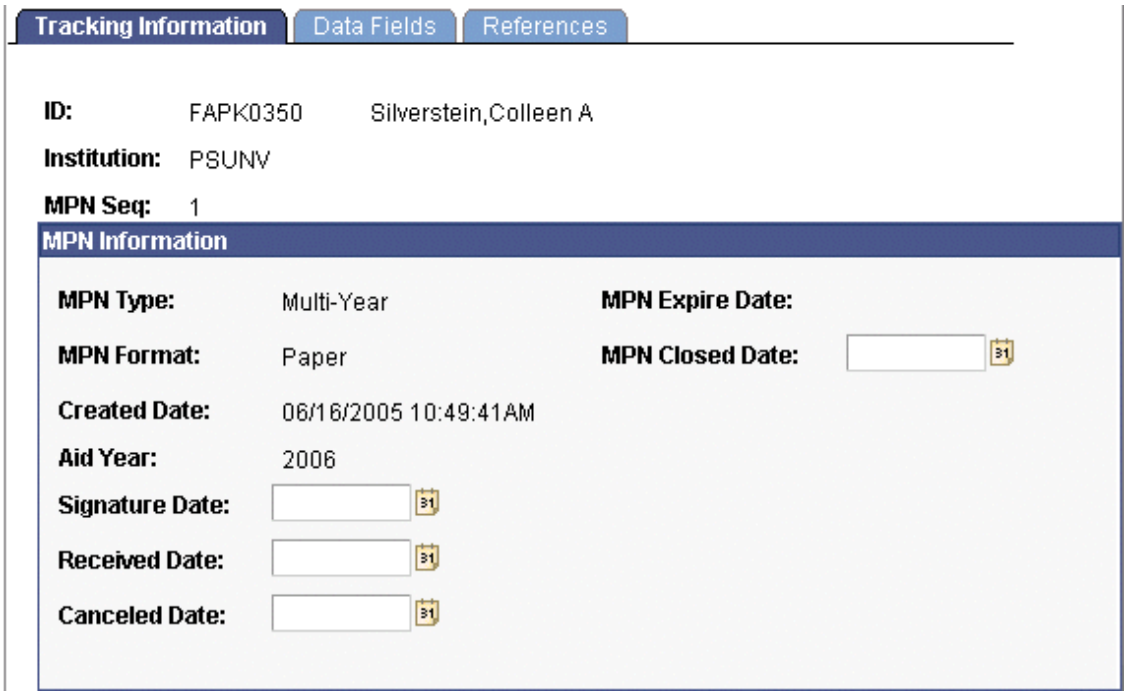
Page Name	Definition Name	Navigation	Usage
Tracking Information	SFA_PERK_MPN_TRACK	**Financial Aid**, and then **Loans**, and then **View Perkins MPN**, and then **Tracking Information**	View Perkins MPN information.
Data Fields	SFA_PERK_MPN_DATA	**Financial Aid**, and then **Loans**, and then **View Perkins MPN**, and then **Data Fields**	View borrower and school information. Reprint Perkins promissory note.
References	SFA_PERK_MPN_REFER	**Financial Aid**, and then **Loans**, and then **View Perkins MPN**, and then **References**	Manually enter MPN reference information or view information captured from the Perkins eMPN process.

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Viewing Perkins MPN Information

Access the Tracking Information page (**Financial Aid**, and then **Loans**, and then **View Perkins MPN**, and then **Tracking Information**).

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



Field or Control	Description
MPN Seq (master promissory note sequence)	Displays the sequence number. The sequence number tracks the number of times the system created an MPN record.
MPN Type (master promissory note type)	Displays the option (annual or multi-year) the institution selected.
MPN Format (master promissory note format)	Displays the format that the system used to create the MPN.
Created Date	Displays the date on which the system created the note.
Aid Year	Displays the aid year in which the system generated the record.
Signature Date	Displays the date on which the borrower signed the note.
Consent Date	Displays the date on which the borrower acknowledged consent to electronically sign the MPN. The consent date appears only for MPNs signed electronically.
Received Date	Displays the date on which the school received the master promissory note.

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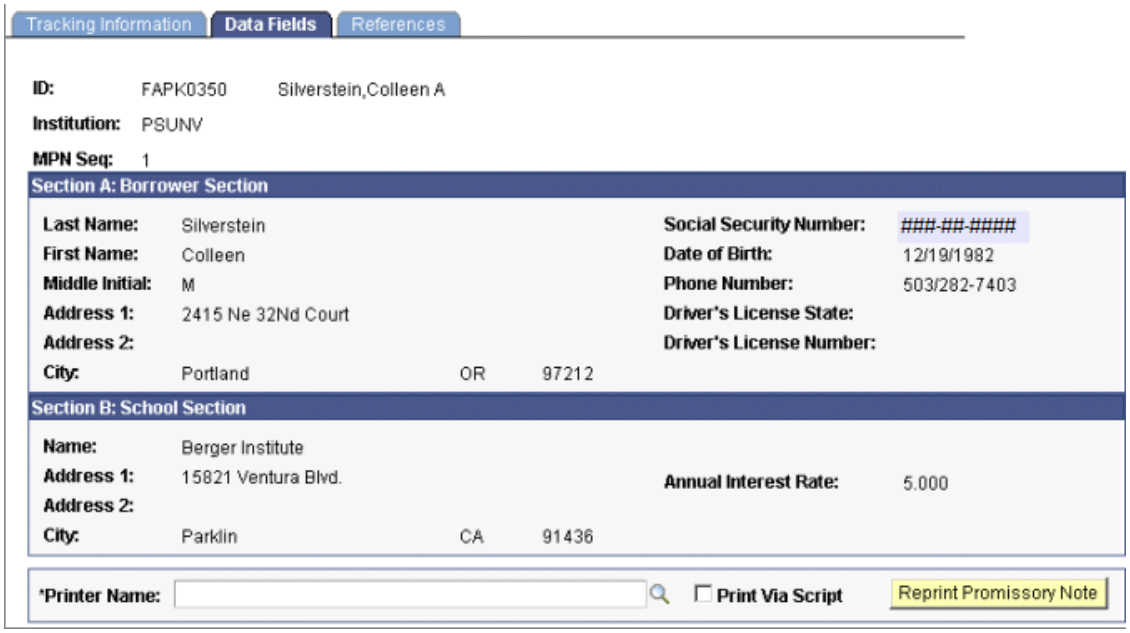
Field or Control	Description
Canceled Date	Displays the date on which the borrower cancelled the loan. You (administrative user) can update this field to cancel loans that may have inadvertently been created, or if the loan was cancelled after the note was generated. After you update the **Canceled Date** field and save, the data on the record becomes display only. This allows you to account for that note, but it does not prohibit you from generating a new note if required. Because sequence number is a key, the system generates new notes provided that the student does not have a valid MPN on record.
MPN Expire Date (master promissory note expire date)	Displays the expiration date for a multi-year MPN. This is required only for schools that are using the multi-year note. The expiration date is based any one of the following federal definitions: • Date the school receives borrower's written request for no additional MPN loans. • Twelve months after signature date if no disbursements are made under the eMPN. • Ten years after signature date or date of school's receipt of the MPN. **Note:** The system maintains this field. The user does not update it. When the system updates a Perkins MPN signature date, it automatically sets the **MPN Expire Date** to twelve months after the signature date. After a disbursement has occurred, the system updates and changes the **MPN Expire Date** to ten years after the signature date.
MPN Closed Date (master promissory note closed date)	Displays the date on which the school closed a loan based on the written request of the student to cancel further loans for the multi-year MPN.

Reviewing and Entering Data

Access the Data Fields page (**(Financial Aid**, and then **Loans**, and then **View Perkins MPN**, and then **Data Fields**).

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

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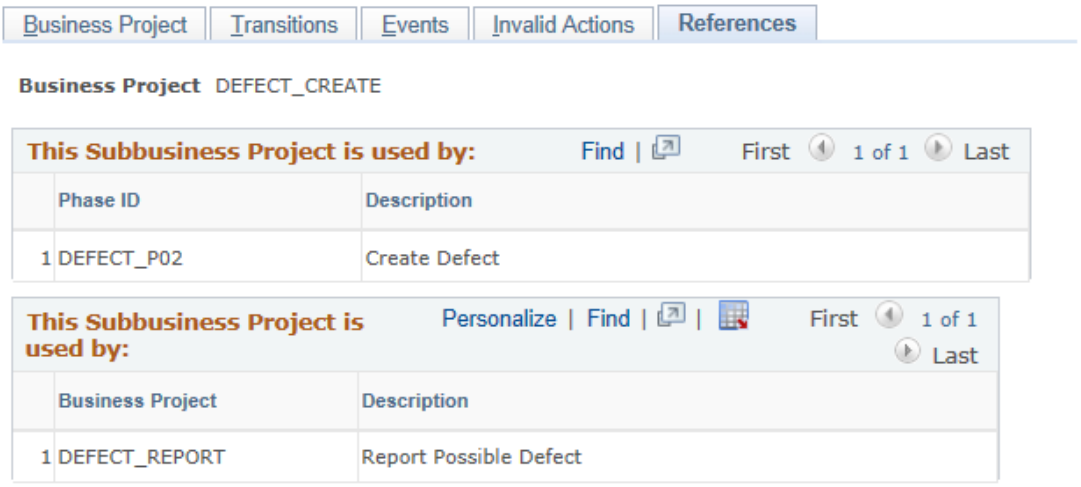
Field or Control	Description
Printer Name	Select the printer from which you want to print the MPN.
Print Via Script	Select to allow for multi platform printing. You should select this check box if you are printing from a UNIX application server or process scheduler environment.
Reprint Promissory Note	Click to reprint the promissory note. You must provide a printer name prior to invoking this process.

Reviewing and Entering References

Access the References page (**Financial Aid**, and then **Loans**, and then **View Perkins MPN**, and then **References**).

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

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Use this page to enter reference information required for students who have been awarded a Perkins loan. You can insert rows based on the number of references required by your institution. If the system created the Perkins MPN record based on the Perkins eMPN process, the system posts the reference information that the student entered using self service.

Viewing Perkins MPN Data

You can view Perkins MPN data from several pages within the system. This section discusses how to:

- View Perkins MPN loan indebtedness information.
- View Perkins MPN dates, history, and repayment schedules.

Pages Used to View Perkins Loan Information

Page Name	Definition Name	Navigation	Usage
Perkins Loan Indebtedness	SFA_PERK_MPN_INDEB	**Financial Aid**, and then **Loans**, and then **View Perkins Loan Indebtedness**, and then **Perkins Loan Indebtedness**	Review the MPN type, format, dates, and loan indebtedness history that the student has incurred at your institution.
Perkins MPN	SFA_PERK_MPN_SEC	Click the Perkins MPN link on the Financial Aid Status page.	Review Perkins MPN information, loan history, and sample repayment schedules.

Viewing Perkins MPN Loan Indebtedness Information

Access the Perkins Loan Indebtedness page (**Financial Aid**, and then **Loans**, and then **View Perkins Loan Indebtedness**, and then **Perkins Loan Indebtedness**).

This page provides the key MPN dates along with the student's detailed Perkins loan indebtedness history at your institution.

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MPN Information

Field or Control	Description
MPN Type (master promissory note type)	Displays the option (annual or multi-year) the institution selected.
MPN Format (master promissory note format)	Displays the format.
Created Date	Displays the date on which the system generated the note.
Signature Date	Displays the date on which the borrower signed the note.
MPN Expire Date (master promissory note expire date)	Displays the expiration date for a multi-year MPN. This is only required for schools who are using the multi-year note. The expiration date is based on any one of the following federal definitions: • The date that the school receives the borrower's written request for no additional MPN loans. • Twelve months after the signature date if no disbursements are made under the MPN. • Ten years after the signature date or the date of school's receipt of the MPN. **Note:** The system maintains this field. The user does not update it. When the system updates a Perkins MPN signature date, it automatically sets the **MPN Expire Date** to twelve months after the signature date. After a disbursement has occurred, the system updates and changes the **MPN Expire Date** to ten years after the signature date.
MPN Closed Date (master promissory note closed date)	Displays the date on which the school closed a loan based on the written request of the student to cancel further loans for the multi-year MPN.

Loan History

Field or Control	Description
Aid Year	Displays the aid year for the expected and actual Perkins award.
Expected Award	Displays the expected Perkins award amount.
Actual Award	Displays the actual or disbursed Perkins award amount.

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> **Note**
>
> The awards in the list are any financial aid item type where the aggregate area is tied to Perkins, even if the item type is not flagged as MPN required. The system keys loan history amounts by school code. Therefore, the system consolidates and displays only loan amounts associated to valid school codes for the institution.

Viewing Perkins MPN Dates, History, and Repayment Schedules

Access the Perkins MPN page (**Financial Aid**, and then **View Financial Aid Status**, and then **Financial Aid Status**, and then **click the Perkins MPN Required link**).

> **Note**
>
> The system displays **Perkins MPN Required** without a link if the system determines that a Perkins MPN is required and a Perkins MPN record does not exist.

MPN Information

Field or Control	Description
MPN Type (master promissory note type)	Displays the option (annual or multi-year) that the institution selected.
MPN Format (master promissory note format)	Displays the format.
Created Date	Displays the date on which the system generated the note.
Signature Date	Displays the date on which the borrower signed the note.
MPN Expire Date (master promissory note expire date)	Displays the expiration date for a multi-year MPN. This is only required for schools who are using the multi-year note. The expiration date is based on any one of the following federal definitions: • The date that the school receives borrower's written request for no additional MPN loans. • Twelve months after the signature date if no disbursements are made under the MPN. • Ten years after the signature date or the date of school's receipt of the MPN. **Note:** The system maintains this field. The user does not update it. When the system updates a Perkins MPN signature date, it automatically sets the **MPN Expire Date** to twelve months after the signature date. After a disbursement has occurred, the system updates and changes the **MPN Expire Date** to ten years after the signature date.

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Field or Control	Description
MPN Closed Date (master promissory note closed date)	Displays the date on which the school closed a loan based on the written request of the student to cancel further loans for the multi-year MPN.

Loan History

Field or Control	Description
Aid Year	Displays the aid year and total indebtedness for the expected and actual award.
Expected Award	Displays the aid year and total indebtedness for the expected and actual award.
Expected Award	Displays the expected award amount.
Actual Award	Displays the actual award amount.

> **Note**
>
> The awards in the list are any financial aid item type where the aggregate area is tied to Perkins, even if the item type is not flagged as MPN required. The system keys loan history amounts by school code. Therefore, the system consolidates and displays only loan amounts associated to valid school codes for the institution.

Sample Repayment Schedule

Field or Control	Description
Total Amount Borrowed	Displays examples of a total amount borrowed.
Monthly Payment	Displays examples of a monthly payment based on the borrowed amount.
Interest Paid	Displays examples of the interest paid based on the borrowed amount.
Total Repaid	Displays examples of the amount repaid based on the borrowed amount.

> **Note**
>
> The information in the **Sample Repayment Schedule** group box cannot be changed or updated.

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41

Authorizing and Disbursing Financial Aid

Understanding Authorizing and Disbursing Financial Aid

This section lists prerequisites and discusses:

- Authorization and disbursement.
- Background authorization and disbursement.
- Online authorization and disbursement.
- Anticipated aid.
- Service impacts on disbursement authorization.

Prerequisites

Before you can authorize and disburse a student's aid, accepted financial aid awards must exist for the student. You must also set up global disbursement rules and financial aid item type disbursement rules for each eligible career before authorizing or disbursing awards.

Related Topics

- Defining Basic Global Rules for Authorization
  Access the Disbursement Rules: Global - Indicators page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Disbursement**, and then **Define Global Rules**, and then **Indicators**).

Authorization and Disbursement

After a student is awarded financial aid and accepts the award, you authorize each payment disbursement and disburse the money into the student's account. That is, disbursing financial aid to students includes two distinct steps:

1. The authorization process uses rules to determine whether a particular award can be disbursed to a student's account. The rules can be set up to apply to all students in a particular career or to particular awards for a career.
2. Disbursement is the transfer of funds from the Financial Aid system to the student's account in the Campus Solutions Student Financials system.

Financial aid awards can appear on the student's account:

- Before disbursement, as anticipated aid on a student's account.
- After disbursement, as actual awards credited to the student's account.

Related Topics

- Student Financials: Entering Groups of Transactions

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Background Authorization and Disbursement

Financial Aid enables you to authorize and disburse aid to individual students or to a group of students. You authorize and disburse aid for a group of students using two background (batch) processes:

1. Authorize awards using background authorization.
   - Use the authorization calendar and background authorization run control page to determine which accepted awards are processed.
   - The background authorization process uses the global disbursement rules and any item type disbursement rules that you set up for the disbursement process, using the award's disbursement date to select the valid effective-dated global rules to enforce, item-type rules to enforce, or both.
   - You can run the authorization process first in test mode to identify potential unauthorized disbursements After resolving problems by making changes to student records, you can run the process again in update mode.
2. Disburse awards using background disbursement.
   - Authorized awards defined in the disbursement calendar are selected for the batch disbursement process.

     Use the background disbursement run control page to further control the records to be processed.
   - Awards that are authorized online but not disbursed online are included in the batch disbursement.
   - Awards for which the authorized amount equals the current disbursed amount are skipped.

Online Authorization and Disbursement

Authorization and disbursement can be done online for individual students and the disbursement process immediately credits the student's account. If the authorization of an award is not successful, the system provides a message explaining each failure. You can revise the student's record and attempt to authorize the award again. If you are unable to authorize an award and want to override the rules that are set up for the career and the award, you can access another page and authorize the award using an override. Authorizing with an override should be done only in very special circumstances because after the award has been authorized, it is easily disbursed. An award can be disbursed only after it is successfully authorized.

> **Warning**
>
> When the system disburses financial aid in batch, it appears in Financial Aid pages as if the funds have been applied to the students' accounts. This is not true. The students' accounts are not actually credited until Student Financials Posting processes apply the funds to the students' accounts. The scheduling of batch disbursement processing should be coordinated with the student financial office to ensure that aid is promptly applied to the students' accounts.

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> **Note**
>
> The *online* authorization and disbursement processes do *not* use the authorization and disbursement calendars. Security for the online authorization and disbursement pages should be closely controlled because aid can be disbursed at any time in the aid year.

Anticipated Aid

When you define financial aid item types, you choose whether the award should be reflected on a student's account in Student Financials as anticipated aid prior to disbursement. Anticipated aid is financial aid that you have awarded but not disbursed to a student.

You can view anticipated aid for a student in one of two ways:

- Use the Anticipated Aid by Term page to view the anticipated financial aid for the student, by term, for a designated aid year.

  You can use this page to determine which awards in each term have yet to be disbursed to a student. A net award amount of zero indicates that the award has been disbursed.
- Use the Anticipated Aid by Item Type page to view a student's anticipated financial aid for a particular term by financial aid item type.

Related Topics

- Reviewing Anticipated Aid
  When each financial aid item type is defined, one of the decisions that you make is whether this aid should be reflected on a student's account in PeopleSoft Student Financials as anticipated aid before the actual disbursement of the aid. The pages that are discussed in this section enable you to view the awards that have been designated as anticipated aid. You can also use these pages to determine whether financial aid awards have been disbursed to students for any term in the aid year.

Service Impacts on Disbursement Authorization

You can use service impacts to prevent disbursement of financial aid funds. Disbursement authorization verifies whether an active service indicator exists for the disbursement term. If the service indicator has been assigned a service impact intended to stop the disbursement of funds, the item type fails authorization. Generally, negative service indicators should be used to hold disbursements.

Related Topics

- Campus Community Fundamentals: Viewing, Assigning, or Removing Service Indicators

Managing User Edit Messages

User edit messages are financial aid office communication records that can be assigned to students for a given aid year. Financial aid offices can use these messages to track financial aid-related events for a student to supplement (or to use as an alternative to) the Campus Community 3C's communication records.

To withhold the disbursement of financial aid funds, assign message codes to global or item type disbursement rules in user edit messages. User edit messages can be assigned manually, in batch, or automatically in the NSLDS Transfer Monitoring Alert file process.

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This section discusses how to:

- Assign user edit messages manually.
- Assign user edit messages in batch.

Related Topics

- Defining User Edit Messages
  To set up user edit messages, use the Create User Edit Messages (USER_EDIT_MSGS) component.

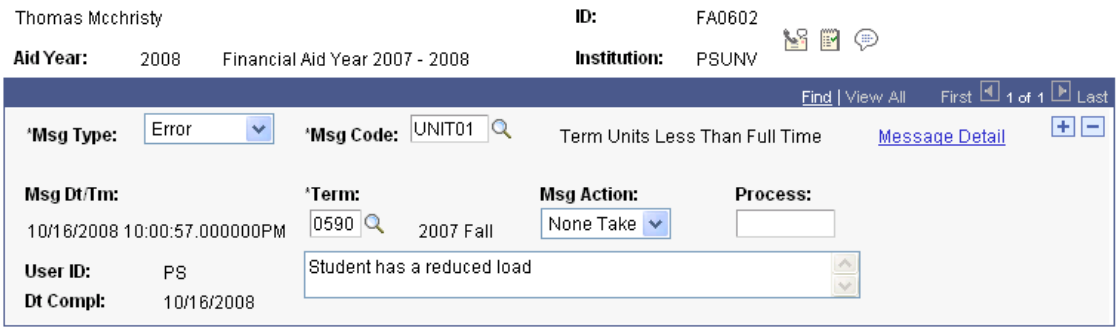
Pages Used to Assign User Edit Messages

Page Name	Definition Name	Navigation	Usage
Review User Edit Messages	STDNT_FA_EDIT_MSGS	• **Financial Aid**, and then **Disbursement**, and then **Maintain User Edit Messages**, and then **Review User Edit Messages** • **Financial Aid**, and then **Awards**, and then **Maintain User Edit Messages**, and then **Review User Edit Messages**	Assign new user edit messages or update existing ones for a student for a given aid year and term.
Process User Edit Messages	SFA_RUN_EDITMSG	**Financial Aid**, and then **Disbursement**, and then **Process User Edit Messages**, and then **Process User Edit Messages**	Assign, update, or delete user edit messages for groups of students.

Assigning User Edit Messages Manually

Access the Review User Edit Messages page (**Financial Aid**, and then **Disbursement**, and then **Maintain User Edit Messages**, and then **Review User Edit Messages**).

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



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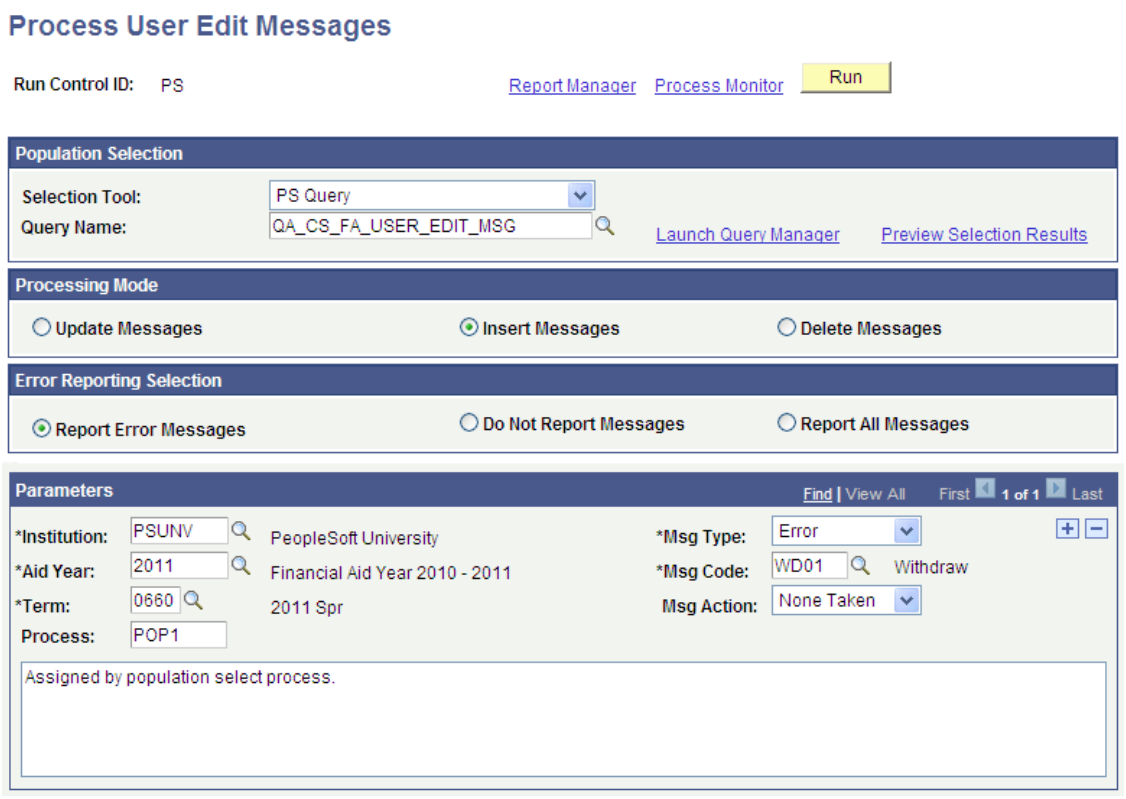
Field or Control	Description
Msg Type (message type)	Enter a message type. Values are: *Error:* A severe message type category that indicates a problem that might necessitate halting financial aid processing for the student. *Informtnl* (informational): Indicates a student event that has no effect on the student's financial aid processes. *Warning:* Indicates a student event that might negatively affect the student's financial aid processes.
Msg Code (message code)	After a message type is selected, the available message codes are limited to those with a matching message type.
Msg Dt/Tm (message date and time)	Displays the date and time that the record was first assigned.
Term	Enter the term for which the user edit message applies. This is a required field.
Msg Action (message action)	Enter the current action taken on the edit message. Values are *None Taken, Pending,* and *Resolved.* Edits set to a resolved status do not hold financial aid disbursements.
Process	User-defined field.
User ID	Displays the ID of the user who entered the record.
Dt Compl (date completed)	Displays the date that the **Msg Action** field is set.

Assigning User Edit Messages in Batch

Access the Process User Edit Messages page (**Financial Aid**, and then **Disbursement**, and then **Process User Edit Messages**, and then **Process User Edit Messages**).

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

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Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. The **Population Selection** group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool (PS Query, Equation Engine, or external file) to identify IDs for a specific transaction, you must use it.

> **Note**
>
> For a PS Query, include EMPLID as part of the criteria to be used by the run control. Your query must also include the bind record PS_SCCPU_STDNT_BND, which requires EMPLID.

See Campus Community Fundamentals: Using the Population Selection Process.

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Processing Mode

Field or Control	Description
Update Messages	Select this option to have the process update the **Msg Action** or **Process** fields or the comments for existing user edit messages for a group of students.
Insert Messages	Select this option to have the process insert new user edit messages for a group of students.
Delete Messages	Select this option to have the process delete existing user edit messages for a group of students.

Error Reporting Selection

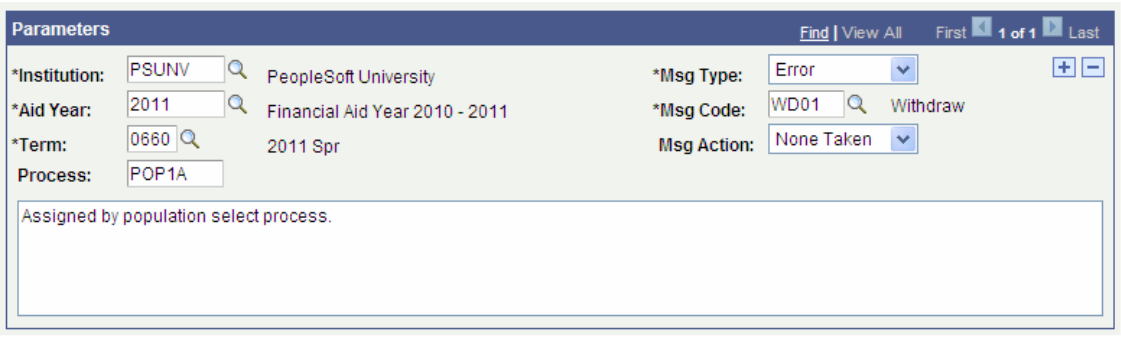
You can select to display error messages only, no messages, or all the messages that the process encounters as it runs. If you display at least the error messages, you can decide whether to investigate and resolve the problems.

Parameters

The fields in the **Parameters** group box are used differently depending on the processing mode that you select.

Here is an example of the **Parameters** group box when the processing mode is **Insert Messages:**

This example illustrates the fields and controls on the Parameters group box - Insert Messages processing mode example. You can find definitions for the fields and controls later on this page.



The fields in the **Parameters** group box are used to create the user edit messages for the selected students.

A user edit message is not inserted if a record with the same **Institution, Aid Year, Term, Msg Type,** and **Msg Action** already exists.

In addition, a user edit message is inserted only if the student is active for the aid year of the intended term.

Here is an example of the **Parameters** group box when the processing mode is **Update Messages:**

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This example illustrates the fields and controls on the Parameters group box - Update Messages processing mode example. You can find definitions for the fields and controls later on this page.



The fields that are located above the **Update Fields** section are criteria fields. Any records that are selected by the selection tool must also meet these additional criteria to be updated.

Only the fields that appear in the **Update Fields** section can be updated: **Process, Msg Action,** and comments.

Here is an example of the **Parameters** group box when the processing mode is **Delete Messages:**

This example illustrates the fields and controls on the Parameters group box - Delete Messages processing mode example. You can find definitions for the fields and controls later on this page.



The fields in the **Parameters** group box are criteria fields. Records that are selected by the selection tool must also meet these additional criteria to be deleted.

Running Background Authorization and Disbursement

This section provides an overview of background authorization and disbursement, lists common elements, and discusses how to:

- Authorize financial aid in batch.
- Disburse financial aid in batch.

Understanding Background Authorization and Disbursement

In most situations, you run authorization and disbursement as background processes for all students who have not had their awards authorized or disbursed.

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Before running these processes, ensure that all terms and careers are specified in your authorization and disbursement calendars and that all financial aid item types needed are correctly defined in the disbursement calendar. You can review a summary of your authorization calendar and disbursement calendar using the View Calendar Settings (DISB_AUTH_CAL_SMRY)component.

The background processes use the authorization and disbursement calendars and the **Disbursement Date** field on the Disbursement ID page to control whether awards can be disbursed. You can also use the Authorize Aid page and the Disburse Aid page to further refine the group of students and the financial aid item types. These pages provide more flexibility than using only the calendars and provide an improvement in performance.

Using these pages, you can redesign a background process previously defined by the disbursement and authorization calendars as a single run control with multiple rows that runs more efficiently. Also, a commit to the database occurs as each row of run parameters is processed, rather than waiting for the entire background process to finish.

The **Term** and **Item Type** fields on the Authorize Aid and Disburse Aid pages act as a filter against the criteria defined in the calendar. For example, you set up your disbursement calendar for aid year 2006 to select all valid terms and all item types. You can set up the batch authorization and disbursement processes to run for only one of the valid terms by creating a run control row that selects only that term. If you select specific financial aid item types for processing using the **Item Type** field, remember that:

- The authorization process allows any financial aid item type to be processed.
- The disbursement process processes only financial aid item types that are defined in the authorization and disbursement calendars.

If you do not use the **Term** and **Item Type** fields, use the authorization and disbursement calendars to define the records to be processed, and not the batch run settings on the Authorize Aid and Disburse Aid pages.

Related Topics

- Authorization and Disbursement Calendars
  Authorization and disbursement calendars are used by the background authorization and disbursement processes only. If you do not use background authorization and disbursement, you do not need to create these calendars. If you set up these calendars, they are not used if you authorize and disburse awards manually (online). For this reason, ensure that access to your online disbursement pages is carefully determined.

Common Elements Used in This Section

Field or Control	Description
Process Instance	Displays the unique identifying number assigned by Process Scheduler to each active row when the authorization process runs.
Run Date and **Time**	Displays the most recent date and time that the process has been run.

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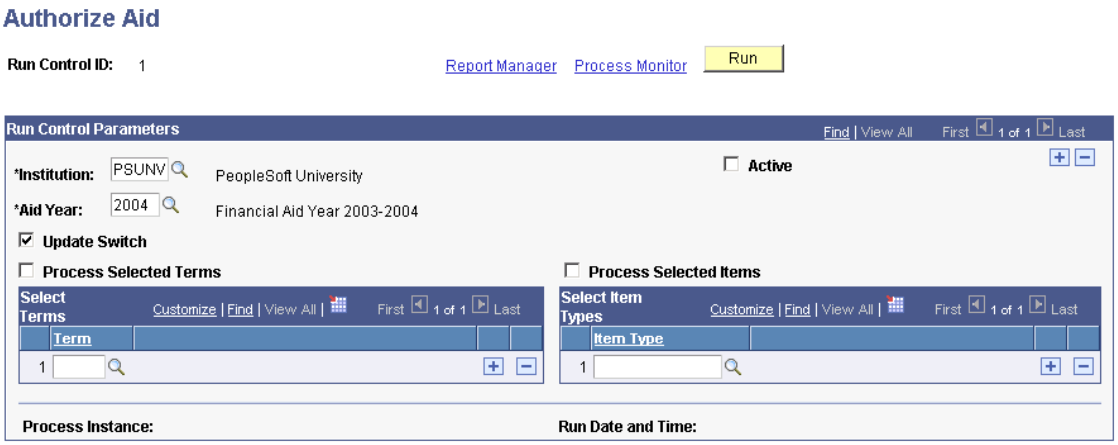
Pages Used to Run Background Authorization and Disbursement Processes

Page Name	Definition Name	Navigation	Usage
Disbursement Calendar Summary	DISB_CAL_SUMRY	**Financial Aid**, and then **Disbursement**, and then **View Calendar Settings**, and then **Disbursement Calendar Summary**	Review your institution's disbursement calendar for a particular financial aid year by effective-dated row.
Authorize Calendar Summary	AUTH_CAL_SUMRY	**Financial Aid**, and then **Disbursement**, and then **View Calendar Settings**, and then **Authorize Calendar Summary**	Review your institution's authorization calendar for a particular financial aid year by effective-dated row.
Authorize Aid	RUNCTL_AUTHRIZE	**Financial Aid**, and then **Disbursement**, and then **Process Award Authorizations**, and then **Authorize Aid**	Authorize financial aid in batch by selecting records for authorization and then running the Background Mass Authorization process.
Disburse Aid	RUNCTL_DISBURSE	**Financial Aid**, and then **Disbursement**, and then **Process Disbursements**, and then **Disburse Aid**	Disburse financial aid in batch by selecting records to disburse and then running the Background Mass Disbursement process.

Authorizing Financial Aid in Batch

Access the Authorize Aid page (**Financial Aid**, and then **Disbursement**, and then **Process Award Authorizations**, and then **Authorize Aid**).

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



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You can restrict the authorization process to specific terms and financial aid item types, as well as set up and process multiple institutions and aid years using the same run control ID. If you do not restrict the authorization process, the process evaluates all students defined in the authorization calendar that have awards with a status of *Accepted* (where the current disbursement amount does not match the current authorized amount—unless the reauthorize option is selected). The process then uses the global and financial aid item type disbursement rules to determine whether an award can be authorized. If an award requires manual authorization, you receive an error message during background processing.

Field or Control	Description
Active	Select to indicate that this row of settings can be processed. You can insert additional rows and have more than one aid year active at the same time. When you run the authorization process, all active rows are processed. The authorization process cannot update rows that have this check box cleared.
Update Switch	Select to have the background authorization process update the database. To perform a test run of the authorization process, clear this check box.
Select Awards in Offered Stat (select awards in offered status)	This check box is available when the **Update Switch** check box is cleared. Select to have the authorization process review only awards in *Offered* status. This option is available only when you are performing a test run so that you do not inadvertently authorize and disburse offered awards.
Process Selected Terms	Select to authorize only selected terms instead of all terms defined for this aid year in the authorization calendar. If cleared, all terms defined in the authorization calendar are authorized.
Term	List the terms defined in the authorization calendar for this aid year that you want to authorize. Only terms defined in the authorization calendar are available for selection.
Process Selected Items	Select to process only selected financial aid item types instead of all financial aid item types. **Note:** The authorization calendar does not define which financial aid item types to authorize. If you do not select this check box, all financial aid item types are processed.
Item Type	Select the financial aid item types that you want to authorize.
Run	Run the Background Mass Authorization process (FAPAUTHS) when you are ready to authorize students in batch. Authorization results done in test mode can be viewed on the Student Authorize/Disburse page. See Reviewing Authorization and Disbursement Results.

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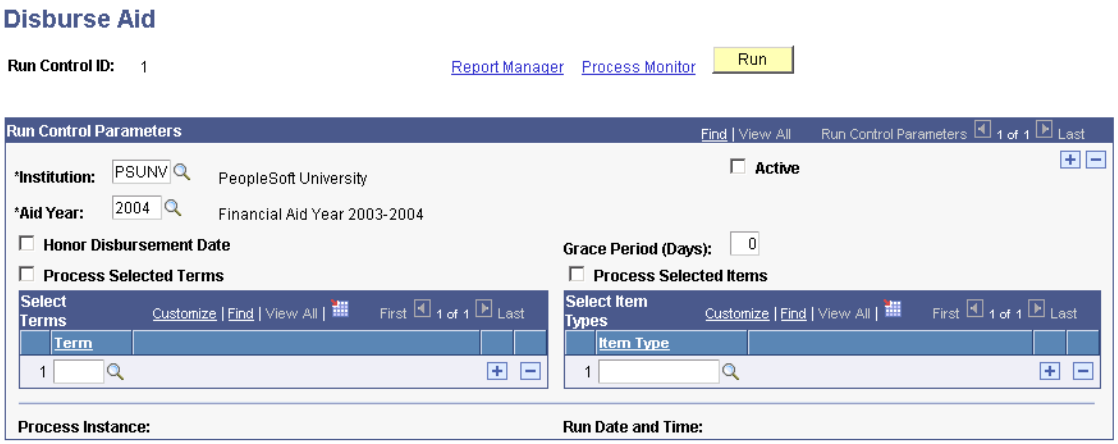
Related Topics

- Defining Disbursement and Anticipated Aid
  Access the FA Item Type 3 page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Awards**, and then **Financial Aid Item Types**, and then **FA Item Type 3**).

Disbursing Financial Aid in Batch

Access the Disburse Aid page (**Financial Aid**, and then **Disbursement**, and then **Process Disbursements**, and then **Disburse Aid**).

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



Only awards that have been authorized (but the disbursed amount does not match the authorized amount) are included in the batch for disbursement. You can restrict the disbursement process to specific terms and financial aid item types. You can also set up and process multiple institutions and aid years using the same run control ID.

Field or Control	Description
Active	Select to indicate that this row is active for the current aid year. You can insert additional rows and have more than one aid year active at the same time. The disbursement process skips rows that have this check box cleared.
Honor Disbursement Date	Select to have the disbursement process compare the disbursement date on the Disbursement ID page against the current date for all selected financial aid item types. The process disburses only those awards that have a disbursement date that is earlier than or equal to the current date. Use the **Grace Period (Days)** field to allow disbursement dates within a specified number of days to be disbursed as well.

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Field or Control	Description
Grace Period (Days)	This field is available only if you select the **Honor Disbursement Date** check box. Enter a limit to the number of days before the disbursement date that funds can be processed for disbursement. For example, if you never want funds to be disbursed more than five days before the scheduled disbursement date, enter *5* in the field. If you want the disbursement date to be earlier than or equal to the current date without exception, enter *0* in this field. For example, assume that you are running the disbursement process on 09/11/00, and you want to process all awards with disbursement dates of 09/15/00 and earlier. You would enter *4* in this field for these disbursement dates to be processed.
Process Selected Terms	Select to disburse only selected terms instead of all terms within the aid year.
Term	Enter the terms defined in the disbursement calendar for this aid year that you want to disburse.
Process Selected Items	Select to disburse only selected financial aid item types instead of all the financial aid item types selected on the disbursement calendar. **Important:** The financial aid item types that you select on the Disburse Aid page do not override the disbursement calendar settings. For example, if the disbursement calendar indicates that all financial aid item types except 900000000001 should be processed, and the Disburse Aid page specifies that only item type 900000000001 should be processed, then no disbursements are made.
Item Type	Select the financial aid item types that you want to disburse. Although all financial aid item types are available for selection in this field, only financial aid item types defined in the disbursement calendar are eligible for processing.
Run	Run the Background Mass Disbursement process (FAPDISBS) when you are ready to disburse aid in batch.

Disbursing Aid Manually

Although you generally run authorization and disbursement for large numbers of students as a background process, you can use the Disburse Aid page to authorize and disburse aid online for an individual student. You can authorize and disburse all of the aid for a term or for a particular award for the term. The page requires you to authorize each award individually.

This section discusses how to:

- Authorize and disburse aid manually.
- Review authorization and disbursement failure messages.

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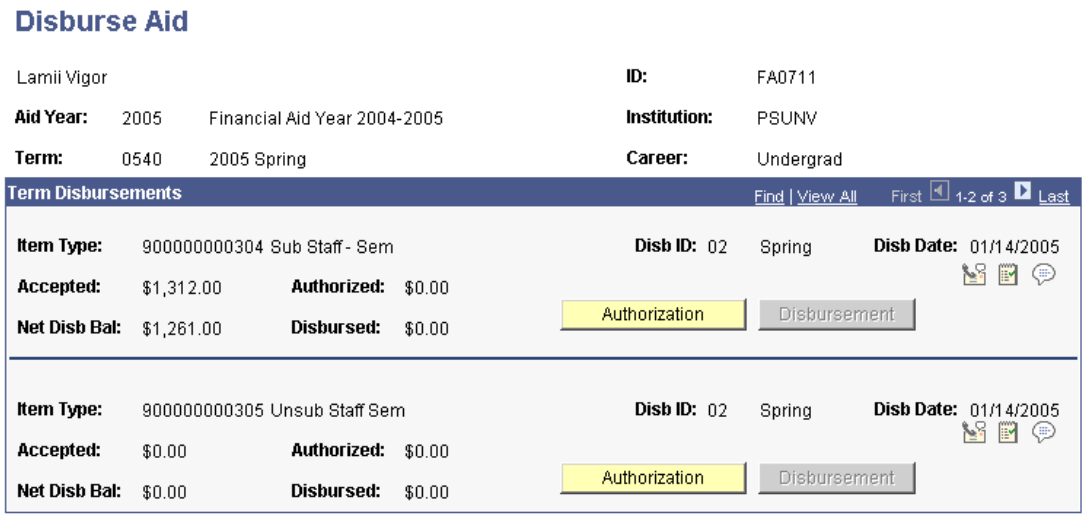
Pages Used to Disburse Aid Manually

Page Name	Definition Name	Navigation	Usage
Disburse Aid	STDNT_DISB_PROCESS	**Financial Aid**, and then **Disbursement**, and then **Disburse Aid**, and then **Disburse Aid**	Authorize and disburse aid manually for a single student, one award at a time.
Disburse Aid - Message Detail	STDNT_DISB_MSG_SP	Click the **Messages** link on the Disburse Aid page or the Disburse Aid with Overrides page.	Review messages for authorization failure, disbursement failure, and disbursement success, as well as override messages.
Disburse Aid - Message Detail: Description	STDNT_DISB_MSG1_SP STDNT_DISB_MSG1	Click the **Messages** link on the Disburse Aid - Message Detail page or on the Student Authorize/Disburse page.	View further information about the displayed message.

Authorizing and Disbursing Aid Manually

Access the Disburse Aid page (**Financial Aid**, and then **Disbursement**, and then **Disburse Aid**, and then **Disburse Aid**).

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



This page displays all of the student's financial aid awards for the selected term. The financial aid award must have a status of *Accepted* for the **Authorization** button to be available. The page shows awards by term, so you can disburse aid only for one term at a time. This can help prevent disbursing aid for subsequent terms unintentionally.

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Field or Control	Description
Disb ID (disbursement ID)	Displays the disbursement ID for the award that falls within the selected term. If the award (such as a Direct Loan) has more than one disbursement that falls within the term, multiple disbursement IDs for the award are on this page.
Disb Date (disbursement date)	Displays the date that the disbursement ID is scheduled for disbursement.
Accepted	Displays the award amount that the student has accepted.
Authorized	Displays the amount that has been authorized for disbursement for that disbursement ID. This amount is zero until you have successfully authorized the award, using either the **Authorization** button on this page or the background authorization process.
Net Disb Bal (net disbursement balance)	Displays the net disbursement balance, which differs from the accepted amount if the actual amount that the student receives is reduced by any administrative fees. This situation occurs for many student loan programs. The amount reflects the net disbursement after fees are taken out.
Disbursed	Displays the amount that has been disbursed to the student for that disbursement ID. This amount is zero until you have successfully disbursed the award, using either the **Disbursement** button on this page or the background disbursement process.
Authorization	Click to run the authorization process for the disbursement ID of a specific financial aid item type for the displayed term. Authorization uses global and financial aid item type disbursement rules to determine whether the award can be authorized. If authorization is not successful, the process generates a message explaining the reason for failure. If authorization fails, your institution's business processes determine whether any corrective action is required by the student, financial aid office, or another department to resolve the failure. After authorization is successful, the **Disbursement** button becomes available.
Disbursement	Click to disburse a specific financial aid item type for the term. This button is available for use only after successful authorization of the award. Click this button to start a disbursement program and send a *quick post* of funds to the student's account in Student Financials. If the student does not already have a student account set up, sending the disbursement also establishes the student's account.

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Field or Control	Description
Messages	Click to access the Disburse Aid - Message Detail page and review messages for authorization failure, disbursement failure, and disbursement success. If authorization passes successfully, no messages appear.

Reviewing Authorization and Disbursement Failure Messages

Several loan types have special authorization rules that are not set up in the Global Disbursement (Disbursement Rules: Global - Indicators page) or Item Type (FA Item Type 5 page, Disbursement Rules: Item Type - Indicators, Groups/Thresholds, Checklists/Tracking) disbursement rules setup pages.

Messages for these special loan item types and missing term data are described in this section.

Error Messages for FFEL, Direct, and Alternative Loan Item Types

The authorization process checks the LOAN_STDNT_AWD record to verify that funds have been received for the student. If funds have not been received, the following authorization error message is sent: Funds for this disbursement have not been recorded in the system.

After funds have been received by electronic roster or by manual entry in the CommonLine Disbursement Maintenance page, the authorization process can reevaluate the item type.

You cannot use the Disburse Aid with Override page to override this authorization error.

Error Messages for Perkins Loan Item Types

If a Perkins loan item type is set up in the Financial Aid Item Type page to require a completed master promissory note, the authorization process checks whether the requirement has been met. If not, one of these error messages is sent:

- A valid Perkins MPN is required to authorize the loan.

  This message indicates that either the school has not yet generated a Perkins MPN or the school generated the Perkins MPN but has not yet signed and received it.

- Perkins MPN setup for this institution is incomplete or missing.

  This message indicates that setup information for Perkins MPN processing has been altered or deleted.

You cannot use the Disburse Aid with Override page to override this authorization error.

Error Message for Missing Term Data

If you manually change a student's career, program, or both in the Financial Aid Term record and do not populate all corresponding fields in that record, you create a condition that prevents disbursements from occurring. Packaging the student with missing term data causes the **STDNT_AWRD_DISB** field to be incomplete.

When you attempt to disburse any monies, you receive the error message: *Fatal Error - Business Unit Not Passed.* This indicates that the business unit is missing from the **STDNT_AWRD_DISB** field. The **STDNT_AWRD_DISB** field is populated as part of the Financial Aid Term record and then propagated to the student award table as a result of award posting.

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To resolve this error, you must populate the Financial Aid Term record completely, post the student's awards, and then authorize and disburse the aid.

Disbursing Aid with Overrides

If you want to disburse the student's award even though it has failed authorization, you can use the Disburse Aid with Override page to override the authorization rules. Disbursing aid by overriding the authorization rules should be done only in special cases.

> **Warning**
>
> Because the Disburse Aid with Override page enables you to override both the global and financial aid item type disbursement rules, you might want to limit the number of users who have access to this page.

This section discusses how to authorize and disburse aid using overrides.

Pages Used to Disburse Aid with Overrides

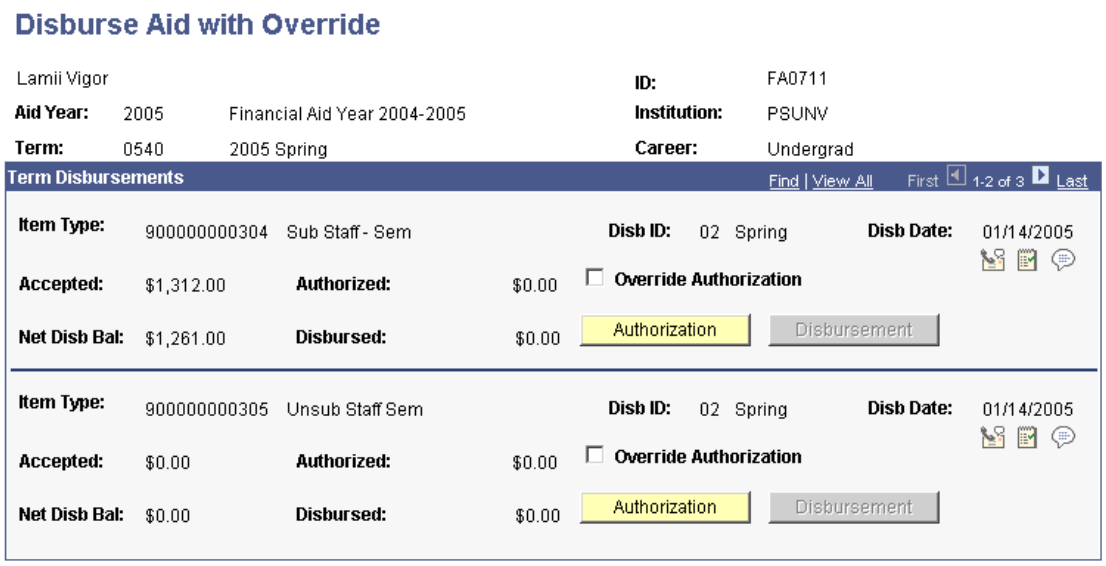
Page Name	Definition Name	Navigation	Usage
Disburse Aid with Override	STDNT_DISB_PROC_WO	**Financial Aid**, and then **Disbursements**, and then **Disburse Aid with Override**, and then **Disburse Aid with Override**	Authorize and disburse aid using overrides. These overrides prevent global and financial aid item type rules from being enforced.
Disburse Aid with Overrides - Message Detail (inquiry)	STDNT_DISB_MSG_SP	Click the **Messages** link on the Disburse Aid page or the Disburse Aid with Override page.	Review messages for authorization failure, disbursement failure, disbursement success; review override messages.
Disburse Aid with Overrides - Message Detail: Description (inquiry)	STDNT_DISB_MSG1_SP STDNT_DISB_MSG1	Click the **Messages** link on the Disburse Aid - Message Detail page or on the Student Authorize/Disburse page.	View further information about the displayed message.

Authorizing and Disbursing Aid Using Overrides

Access the Disburse Aid with Override page (**Financial Aid**, and then **Disbursements**, and then **Disburse Aid with Override**, and then **Disburse Aid with Override**).

This example illustrates the fields and controls on the Disburse Aid with Override page. You can find definitions for the fields and controls later on this page.

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The Disburse Aid with Override page displays all of the student's financial aid awards for the selected term. The financial aid award must have a status of *Accepted* for the **Authorization** button to be available. The page shows awards by term, so you can disburse aid only for one term at a time. This helps to prevent disbursing aid for subsequent terms unintentionally.

Field or Control	Description
Override Authorization	Select to have the authorization process ignore the global and financial aid item type disbursement rules. Then click the **Authorization** button to run authorization and make available the **Disbursement** button. After you have authorized an award with overrides, the system clears this check box. The only way to determine whether the amount was authorized with overrides is to click the **Messages** link. The message *Authorization has been Overridden!* indicates that overrides were used. **Note:** If you attempt to override authorization for external loans, such as the FFEL Stafford, Plus, and Alternative loans, the funds must be received at your institution or the authorization process fails, regardless of the override.

The descriptions for the other fields on this page match those on the Disburse Aid page.

Related Topics

- Disbursing Aid with Overrides
  If you want to disburse the student's award even though it has failed authorization, you can use the Disburse Aid with Override page to override the authorization rules. Disbursing aid by overriding the authorization rules should be done only in special cases.

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Reviewing Authorization and Disbursement Results

This section discusses how to:

- Review a student's authorization and disbursement activity.
- Review award summary information.

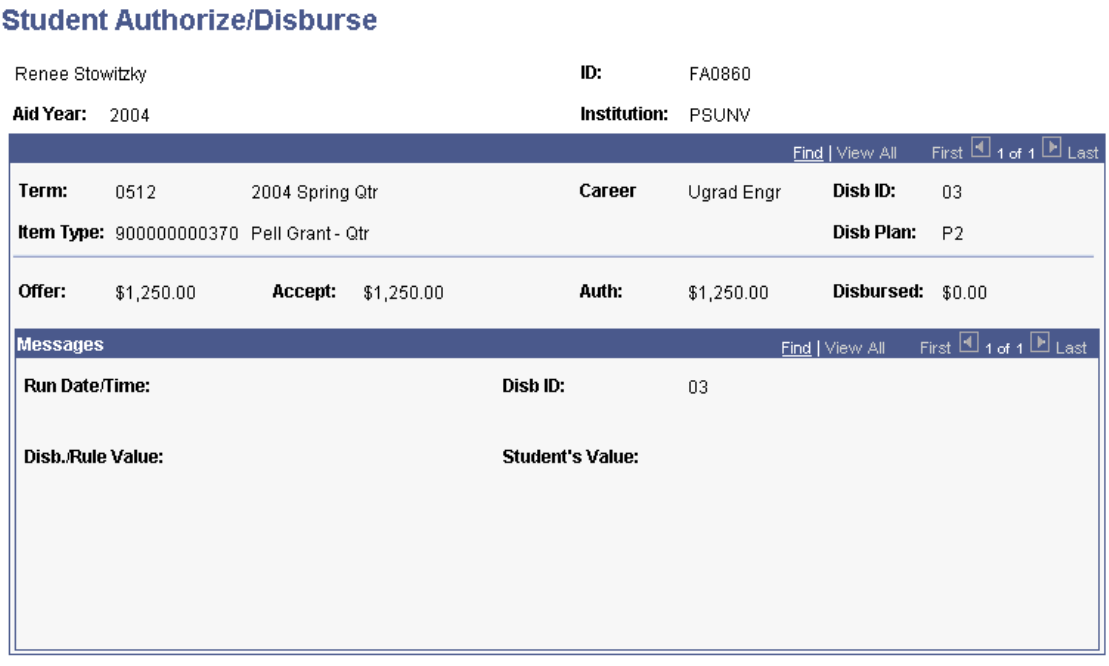
Page Used to Review Authorization and Disbursement Results

Page Name	Definition Name	Navigation	Usage
Student Authorize/ Disburse	STDNT_DISB1	**Financial Aid**, and then **Disbursement**, and then **View Disbursement Status**, and then **Student Authorize/Disburse**	Review a student's authorization and disbursement activity by term. The page displays only the awards that you have authorized or tried to authorize.

Reviewing a Student's Authorization and Disbursement Activity

Access the Student Authorize/Disburse page (**Financial Aid**, and then **Disbursement**, and then **View Disbursement Status**, and then **Student Authorize/Disburse**).

This example illustrates the fields and controls on the Student Authorize/Disburse page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Disb ID (disbursement ID)	Displays the disbursement ID for the award that occurs within the selected term. If the award has more than one disbursement that occurs within the term, and these disbursement IDs have been authorized, use the scroll arrows to view the other disbursement IDs.
Disb Plan (disbursement plan)	Displays the disbursement plan associated with the award.
Offer	Displays the award amount offered by the financial aid office to the student when the student was packaged.
Accept	Displays the award amount that the student has accepted.
Auth (authorized)	Displays the total amount that has been authorized for disbursement for that disbursement ID. This amount is zero until you have successfully authorized the award.
Disbursed	Displays the total amount that has been disbursed to the student for that disbursement ID. This amount is zero until you have successfully disbursed the award.

Messages

You can view any authorization or disbursement messages for this disbursement ID in this group box.

Reviewing Award Summary Information

You view summary information regarding a student's financial aid awards and the authorized and disbursed amounts on several pages. These pages all include the authorized and disbursed amounts but vary in additional information and format.

Award Summary By Date

Use the As of Award Summary page **(Financial Aid**, and then **Awards**, and then **View by Date**, and then **As of Award Summary)** to review a student's aid information as of a particular date. The page displays information for the entire aid year, including the financial aid item type, the career, and the offered, accepted, authorized, and disbursed amounts for each award in that aid year. The information is from student award information and the authorization and disbursement processes.

See Reviewing Award Summary by Date.

Award Summary Information

Use the Award Summary page **(Financial Aid**, and then **Awards**, and then **View Term Award Summary**, and then **Award Summary)** to view a student's awards and the offered, accepted, authorized, and disbursed amounts for each award for the entire aid year. Totals for each type of amount are displayed at the bottom of the page. Authorized and disbursed amounts might not equal the accepted amount if not all terms have been disbursed.

See Reviewing an Annual Award Summary.

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Award Summary Information By Category

Use the Award Category Totals page **(Financial Aid**, and then **Awards**, and then **View Award Category Summary)** to view awards by award category for the entire aid year. Totals for each award category and information about unmet need (including both federal and institutional calculations of need) are available. If the student has been overawarded by either federal or institutional calculations, the unmet need information is highlighted in red. You can click the drill-down button to view the awards included in each category—and the award status, offered, accepted, authorized, and disbursed amounts, and career, disbursement plan and split codes.

See Reviewing Award Summary Information by Category.

Earnings Summary and Awards

Use the Awards/Earnings Summary component to view a student's financial aid awards and campus earnings. Information for each award includes the associated career, offered amount, accepted amount, authorized amount, and disbursed amount. The campus earnings information includes hours worked and gross earnings expressed in year-to-date, month-to-date, and quarterly amounts.

See Managing Work-Study Jobs.

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42

(GBR) Using Student Loans Company

Common Elements Used in Student Loans Company

Field or Control	Description
HEI Code (higher education institution code)	Select the code for which you want to load the data. The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.
SLC Acad Year (Student Loans Company academic year)	Select the SLC academic year for which you want to load the data. The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.
File Path and Name	Enter one or more files to import. If a file is not entered, the process considers only unprocessed records. **Note:** The definitions for **HEI Code, SLC Acad Year,** and **File Path and Name** relate to importing files.
UCAS Course Code (Universities & Colleges Admissions Service course code)	Displays the UCAS code assigned to the course.
SLC Course Code (Student Loans Company course code)	Displays the SLC code assigned to the course.
Year of Course	Displays the year of the course in which student is currently enrolled.
Course Tuition Fee Amt (course tuition fee amount)	Displays the course fee that applies to the course.
Tuition Fee Loan Payable	Displays the portion of the fee paid by TFL.
Tuition Fee Grant Payable	Displays the portion of the fee paid by TFG.
Tuition Fee Student Payable	Displays the portion of the fee that the SLC expects to be paid directly by student.
Course Start Date	Displays date that the student commenced the course.
Grant Payable	Indicates whether the student is entitled to a supplementary grant.
Bank Details Held	Indicates whether the student has supplied bank details.
Valid NINO Flag (valid national insurance number flag)	Indicates whether the student has provided a valid national insurance number or a valid reason for not supplying it.
Disabled Distance Learner	Indicates whether the applicant is a distance learner due to a disability.

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Field or Control	Description
Bursary Student Flag	Indicates whether the student has a bursary.
FSN Status or **Student Status**	Displays the student notification status as notified by the awarding authority. Values are: • *B (Living Costs and Fees).* • *L (Living Costs).* • *F (Final).* • *P (Provisional).* • *D (Deceased).* • *K (Resumption).* • *N (Resumption).* • *S (Suspended).* • *T (Transfer fees to previous institution).* • *V (Transfer fees to new institution).* • *W (Withdrawn-final).* • *Y (Withdrawn-provisional).* • *Z (Study in second term only).*
Student Support Nbr (student support number)	Displays an identifier assigned by the SLC to a student who applies for financial assistance.
SSAR	Student Support Attendance Request
SSAC	Student Support Attendance Confirmation
HEBSS	Higher Education Bursaries and Scholarship Scheme
ACR	Attendance Confirmation Request
SISF	Student Information Summary File

Importing SSAR Files

This section provides an overview of SSAR files and discusses how to load SSAR files.

Understanding SSAR Files

After the SLC receives applications for financial assistance from students, the SLC sends SSAR reports to the HEIs. These reports list individual students attending the HEI and include biographic and demographic data, information about the students' courses of study, and the amount of Tuition Fee Grant (TFG) and Tuition Fee Loan (TFL) assistance that each student can expect. The amounts for the TFG and TFL are used to offset students' tuition fee charges.

SSAR reports require a response from the HEI in the form of an SSAC.

When you import the Registration Confirmation report (SSAR) from the SLC, the filename is defaulted to 'Registration Confirmation Report', and the sequence number field is zeros. Overwrite the file name before saving or importing the file into your system. Ensure that the file is always imported with a unique name as per the naming convention. Do not re-import the same data or the same data file more than once either with same file name or a different file name.

The Import SSAR File process:

1. Loads data into a staging table.
2. Attempts to match on Student Support Number (SSN).

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If a match exists, the record is loaded to the application table for use in the system. A student with a match is aid-year activated for the aid year selected in the Student Loans Company Setup (SFA_SLC_SETUP) component.

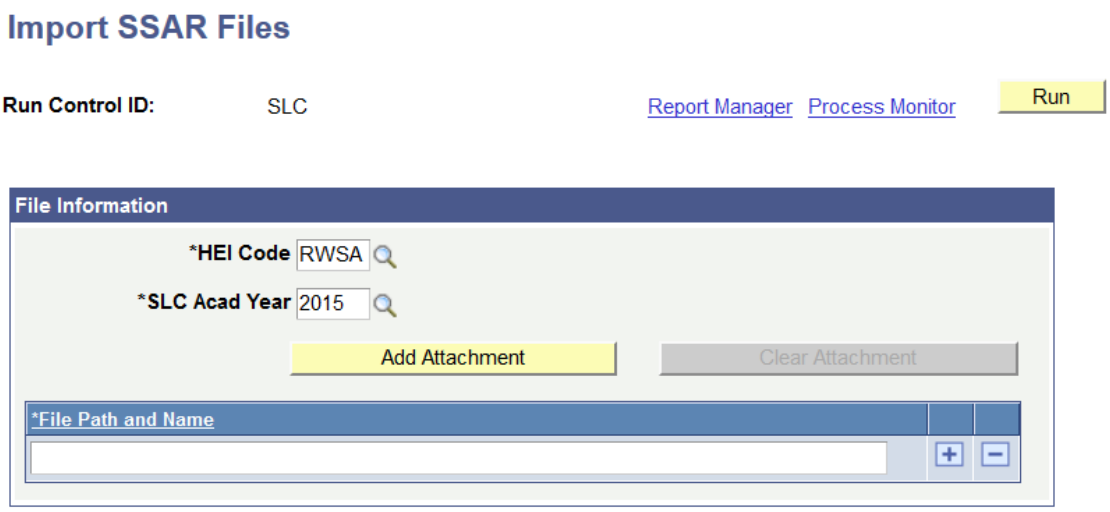
Page Used to Load SSAR Files

Page Name	Definition Name	Navigation	Usage
Import SSAR Files	SFA_SLC_RC_SSAR	**Financial Aid**, and then **Student Loans Company**, and then **Import SSAR Files**, and then **Import SSAR Files**	Load SSAR files.

Loading SSAR Files

Access the Import SSAR Files page (**Financial Aid**, and then **Student Loans Company**, and then **Import SSAR Files**, and then **Import SSAR Files**).

This example illustrates the fields and controls on the Import SSAR Files page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
File Path and Name	Enter the location of the file to be imported. The file name must be unique. **Warning!** Do not attempt to reload a file with the same data or the same file name.

Managing SSAR Suspensions

This section provides an overview of SSAR suspensions and discusses how to review and manage unmatched or unprocessed SSAR data.

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Understanding SSAR Suspensions

Use the Manage SSAR Suspense (SFA_SLC_SSAR_DTL) component to review and manage unmatched or unprocessed SSAR data.

The system does not provide an option for adding a new person to the system as a result of reviewing unmatched or unprocessed data.

Also, this process does not update Campus Community Person biographic and demographic data.

Page Used to Review and Manage Unmatched or Unprocessed SSAR Data

Page Name	Definition Name	Navigation	Usage
Manage SSAR Suspense	SFA_SLC_SSAR_DTL	**Financial Aid**, and then **Student Loans Company**, and then **Manage SSAR Suspense**, and then **Manage SSAR Suspense**	Review and manage unmatched or unprocessed SSAR data.

Reviewing and Managing Unmatched or Unprocessed SSAR Data

Access the Manage SSAR Suspense page (**Financial Aid**, and then **Student Loans Company**, and then **Manage SSAR Suspense**, and then **Manage SSAR Suspense**).

This example illustrates the fields and controls on the Manage SSAR Suspense page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Manage SSAR Suspense page (2 of 2). You can find definitions for the fields and controls later on this page.

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After a match is identified, you can load the data in the Student SLC Data table used for SSAC generation and award packaging.

Field or Control	Description
Status	If the status is *Processed*, you can only view the field. If the status is one of the following values, you can select a different value and click **Save** to update the SSAR status: • *Skipped:* This record will not be considered for matching in any future runs of the Import SSAR Files process. • *Suspended:* No match was found for this record. The record will be considered for matching the next time that the Import SSAR Files process is run. • *Unprocessed:* The record will be considered for matching the next time that the Import SSAR Files process is run. You can update students with a *Skipped* status to *Unprocessed* so they can be considered for matching the next time that the Import SSAR Files process is run.

Search Match

Field or Control	Description
Search Match	Click this link to access the Person Search Match page and search for a student ID to match the SSAR record.
ID	The EMPLID of the existing person with whom you want to match this record.
ID Lock	After you enter an ID, select this check box to force the SSAR load process to use the ID.
Use Search/Match ID	Click this link to populate the **ID** field with the result from the Person Search/Match.

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Field or Control	Description
Process SSAR (process Student Support Attendance Requests)	Click to force the SSAR record to be matched with the EmplID that you selected. If the match is successful, the SSAR record is loaded. If the match is not successful, a message appears in the page header message area: • *Student Not Found* • *Multiple Student Matches Found* • *Match Option Set to Suspend:* A match was found after Search/Match was run, but the Search/Match rule set the record to *Suspended.* • *ID Linked to Another SSN:* EmplID already has an external ID type of *SLC.* • *SSN Linked to Another ID:* The SSN in this record is already associated with an EmplID.
Max Match Level (maximum match level)	Displays the highest Search Match Level rule that was met for this SSAR record.
Matches	Displays the number of matches found by the Search Match process.

Course/SLC Data

Field or Control	Description
Issue Date	Displays the date that the SLC issued the SSAR to the HEI.
Loan Applied For	Displays the type of loan for which the student applied. Values are: • *F (Full Entitlement)* • *P (Part Entitlement)* • *N (No loan applied for)*

Generating SSAC Data

This section provides an overview of SSAC data and discusses how to:

- Add SSAC data manually.
- Generate SSAC data.

Understanding SSAC Data

SSARs can be received daily and are usually responded to the same day with an extract of data, the SSAC file, that is sent back to SLC. Occasionally, schools may also need to include students for whom no SSAR has been received in an SSAC extract. The SSAC confirms the physical attendance of each student on the campus. The HEIs must ultimately record that a student has been seen and report that information to the SLC in an SSAC file.

The receipt of the SSAC by the SLC authorizes the beginning of maintenance (living expense) payments directly to the student by government authorities. This assistance is different from the TFGs and TFLs, which are for tuition fees only and paid directly to the institution. The HEI

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does not determine what the maintenance payments are and does not need to monitor these payments.

For a student to be automatically included in the SSAC extract, the student must:

- Have a SSAR record loaded.
- Have no previous SSAC processed.
- Be included in the selected Population Selection option.
- Meet requirements in the SLC setup:
  - If the **Use Physical Attendance Flag** check box is selected on the Student Loans Company-Options (setup) page, the **Physical Attendance Confirmed** check box must be selected for the student on the SSAC page in the View SLC Student Data (SFA_SLC_STUDENT) component for the student to be included in the SSAC extract.
  - If a checklist is selected in the **Use Checklist** field on the Student Loans Company-Options (setup) page, the student must have that checklist assigned and completed to be included in the SSAC Extract.

If the **Complete SSAR Checklist** check box on the Student Loans Company–Options page is selected, students who were assigned an SSAR Checklist during the Import SSAR Files process and are added to the SSAC extract have their SSAR Checklists marked as complete.

For a student to be manually included in an SSAC extract, add the student to the SSAC Manual Entry table using the Manual SSAC Manual Entry page.

Pages Used to Generate SSAC Data

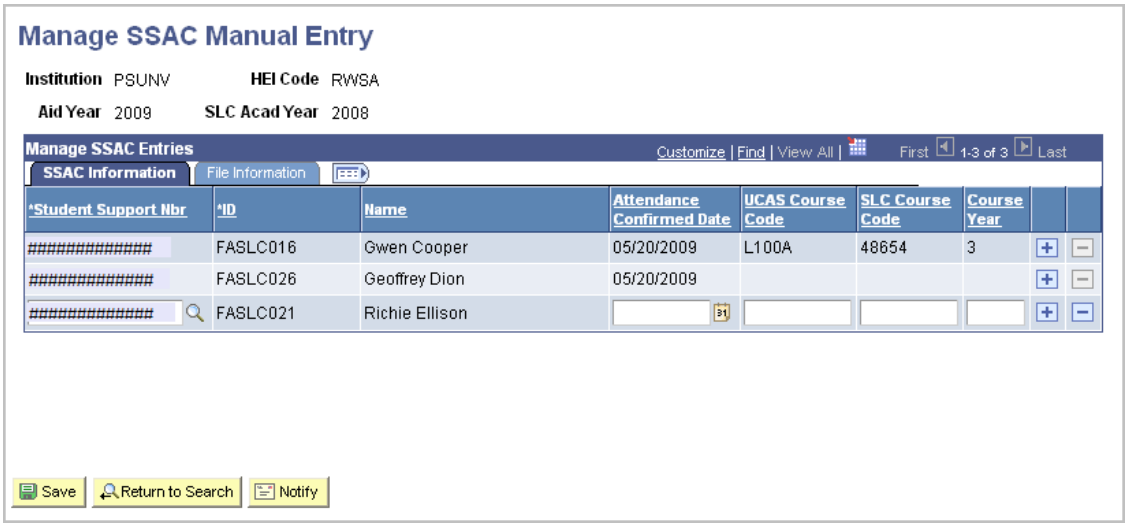
Page Name	Definition Name	Navigation	Usage
Manage SSAC Manual Entry	SFA_SLC_SSACMAN	**Financial Aid**, and then **Student Loans Company**, and then **Manage SSAC Manual Entry**, and then **Manage SSAC Manual Entry**	Add a student manually for inclusion in an SSAC extract file.
Generate SSAC Data	SFA_SLC_RC_SSAC	**Financial Aid**, and then **Student Loans Company**, and then **Generate SSAC Data**, and then **Generate SSAC Data**	Define SSAC parameters and generate SSAC data in an extract file.

Adding SSAC Data Manually

Access the Manage SSAC Manual Entry page (**Financial Aid**, and then **Student Loans Company**, and then **Manage SSAC Manual Entry**, and then **Manage SSAC Manual Entry**).

This example illustrates the fields and controls on the Manage SSAC Manual Entry page. You can find definitions for the fields and controls later on this page.

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Use this page when you want to include a student in an SSAC extract but no SSAR record has been received for the student.

Field or Control	Description
Student Support Nbr (student support number)	Add a new row and enter a student's SSN. • If the SSN is already in the External System ID table, the ID and name are automatically entered when you tab out of the **Student Support Nbr** field. • If the SSN is not in the system, you must manually enter the ID. The name is automatically entered when you tab out of the **ID** field. When the row is saved, the SSN is added to the External System ID table for that student ID.

The **Attendance Confirmed Date, UCAS Course Code, SLC Course Code,** and **Course Year** fields are optional. If both a **UCAS Course Code** and **SLC Course Code** are entered, the UCAS Course Code is used in the SSAC file.

When the Generate SSAC Data process is run, it includes any unprocessed SSAC manual entries in the SSAC file that is created by the process. These entries remain on the Manage SSAC Manual Entry page in view–only mode after being processed and included in an SSAC file.

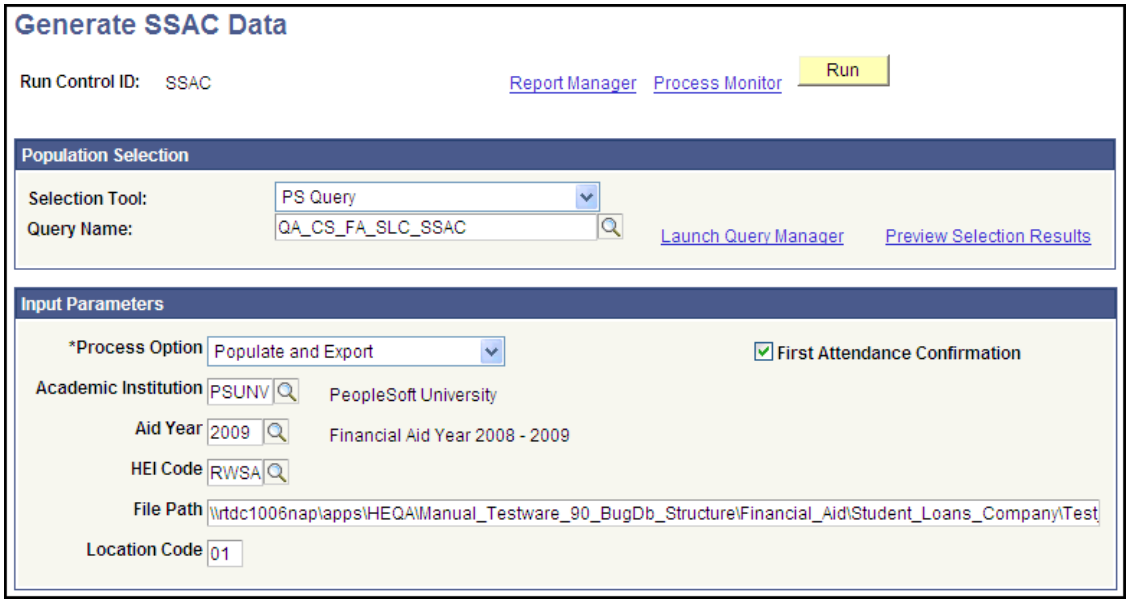
When the Import SSAR Files process is run and SSAR data is imported for a student whose SSAC data was entered manually, the process checks to see if a SSAC record exists. If the SSAC record does not exist, the process creates a SSAC record using the manually entered SSAC data.

Generating SSAC Data

Access the Generate SSAC Data page (**Financial Aid**, and then **Student Loans Company**, and then **Generate SSAC Data**, and then **Generate SSAC Data**).

This example illustrates the fields and controls on the Generate SSAC Data page. You can find definitions for the fields and controls later on this page.

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Use this page to create an extract file to send to the SLC to confirm a student's physical attendance.

The Population Selection process is used to determine which students are included in the SSAC extract file that is sent to the SLC. The **Population Selection** group box appears if you select either the *Populate* process option or the *Populate and Export* process option.

See Campus Community Fundamentals: Queries for Population Selection.

See Campus Community Fundamentals: Equations for Population Selection

Input Parameters

Field or Control	Description
Process Option	Select a process option. Values are: • *Populate Only:* Populate the SSAC table. • *Export Only:* Create only an extract file of populated SSAC data to send to the SLC. • *Populate and Export:* Populate the SSAC table and create an extract file of SSAC data to send to the SLC.
First Attendance Confirmation	Select this check box to indicate that you want the SSAC report to confirm attendance for the SLC First Liability Period.
File Path	Enter the location for the extract file. This field is activated if a value of *Export Only* or *Populate and Export* is selected in the **Process Option** field. The file path must end with a backslash (\).
Location Code	Enter the location code for the specific location at the HEI. The values range from *01* to *99*.

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Importing HEBSS Files

This section provides an overview of HEBSS files and discusses how to load HEBSS files.

Understanding HEBSS Files

HEIs in the United Kingdom can elect to participate in the HEBSS with the SLC. The scheme determines student eligibility for and disburses various bursaries and scholarships.

Schools can choose to provide criteria to the SLC and let the SLC determine eligibility for and disburse bursaries and scholarships on their behalf. Alternatively, schools might use financial circumstances data collected by the SLC and included in the HEBSS report to determine bursary and scholarship eligibility and disburse these funds to the students themselves. This report does not require a response from the HEI.

The Import HEBSS Files process:

1. Loads the data to a staging table.
2. Attempts to match on SSN:
   - If a match exists, the record is loaded to an application table for use in the system.
   - If no match exists, the process attempts a match using the Search Match Criteria page in the Student Loans Company Setup component.

     If a match is found, the record is loaded to the application table for use in the system.

Page Used to Load HEBSS files

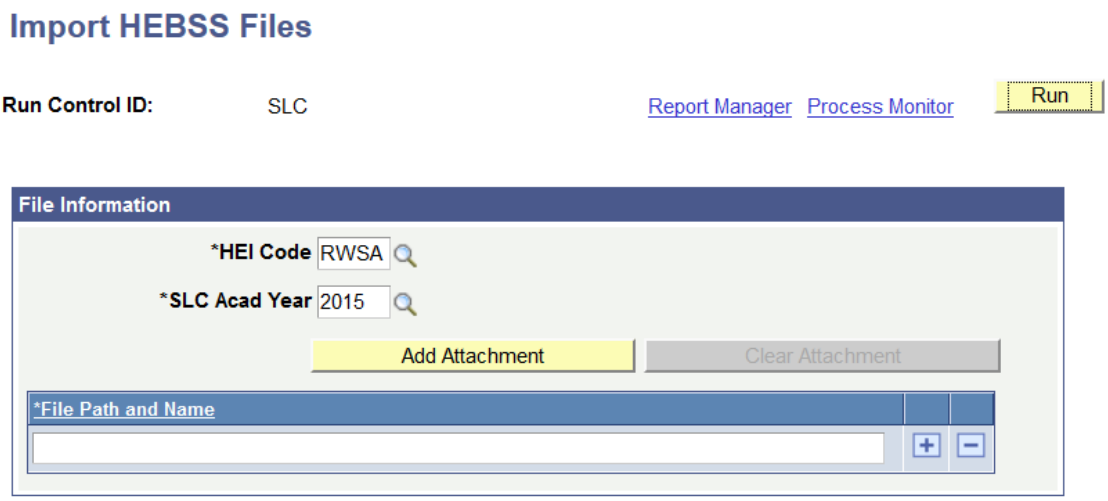
Page Name	Definition Name	Navigation	Usage
Import HEBSS Files	SFA_SLC_RC_HEBSS	**Financial Aid**, and then **Student Loans Company**, and then **Import HEBSS Files**, and then **Import HEBSS Files**	Load HEBSS files.

Loading HEBSS Files

Access the Import HEBSS Files page (**Financial Aid**, and then **Student Loans Company**, and then **Import HEBSS Files**, and then **Import HEBSS Files**).

This example illustrates the fields and controls on the Import HEBSS Files page.

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Managing HEBSS Suspensions

This section provides an overview of HEBSS suspensions and discusses how to review and manage unmatched or unprocessed HEBSS data.

Understanding HEBSS Suspensions

Use the Manage HEBSS Suspense (SFA_SLC_HEBSS_DTL) component to review and manage unmatched or unprocessed HEBSS data.

The system does not provide an option for adding a new person to the system as a result of reviewing unmatched or unprocessed data.

Also, this process does not update Campus Community Person biographic and demographic data.

Page Used to Review and Manage Unmatched or Unprocessed HEBSS Data

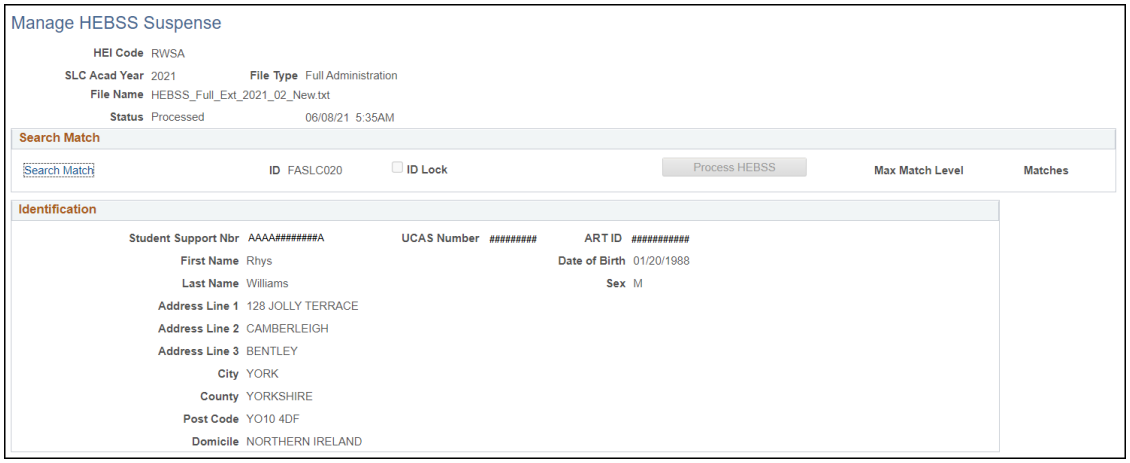
Page Name	Definition Name	Navigation	Usage
Manage HEBSS Suspense	SFA_SLC_HEBSS_DTL	**Financial Aid**, and then **Student Loans Company**, and then **Manage HEBSS Suspense**, and then **Manage HEBSS Suspense**	Review and manage unmatched or unprocessed HEBSS data.

Reviewing and Managing Unmatched or Unprocessed HEBSS Data

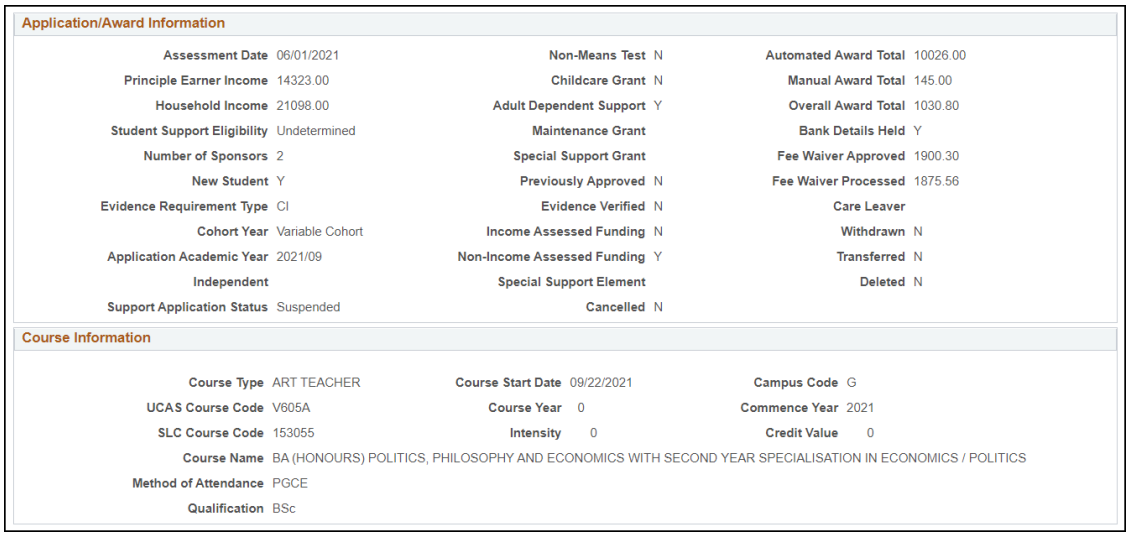
Access the Manage HEBSS Suspense page (**Financial Aid**, and then **Student Loans Company**, and then **Manage HEBSS Suspense**, and then **Manage HEBSS Suspense**).

This example illustrates the fields and controls on the Manage HEBSS Suspense page (1 of 2). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Manage HEBSS Suspense page (2 of 2). You can find definitions for the fields and controls later on this page.



> **Note**
>
> For information about the **Status** field and the fields in the **Search Match** group box, refer to the information provided about similar fields on the Manage SSAR Suspense page.

Identification

Field or Control	Description
ART ID (Automated Response Technology Identification)	The ART ID is an eleven-digit number that is used to uniquely identify a student's SLC student finance account. It is automatically issued when the student applies for financial support.

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Application/Award Information

Field or Control	Description
Automated Award Total	Displays the student's total approved automated award entitlement as awarded by SLC using HEI rules.
Manual Award Total	Displays the student's total approved manual award entitlement, which is manually entered in the SLC system by the HEI.
Overall Award Total	Displays the student's total overall approved award entitlement.
Non-Means Test	Indicates whether the student is applying for only non-means-tested support.
Evidence Verified	Indicates whether all financial evidence has been received to validate the student's application.
Income Assessed Funding	Indicates whether the student has applied for income assessed NHS funding.
Non-Income Assessed Funding	Indicates whether the student has applied for non-income assessed NHS funding.

Course Information

Field or Control	Description
Course Type	Displays the course type. Values are: • *ACCELERATED (Course compresses a two year course into one year of study)* • *ART TEACHER* • *EMERGENCY* • *FRANCHISED* • *OTHER* • *PART TIME* • *PGCE (Post Graduate Certificate In Education)*
Method of Attendance	Displays the method of attendance. Values are: • *Full Time* • *Part Time* • *PGCE* (post graduate)
Qualification	Displays the qualification achieved upon course completion.
Commence Year	The year that the student commenced studying.

Importing ACR and SISF Files

This section provides an overview of ACR and SISF files and discusses how to load ACR and SISF files.

Understanding ACR and SISF Files

The ACR and SISF files contain TFG and TFL information for individual students.

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The ACR file requires a response from the HEI to the SLC. When the HEI responds, it confirms student data to the SLC, including attendance and course of study information. These files are sent to the HEI from the SLC starting in December of each academic year.

The SISF file is informational only and does not require a response from the HEI. It is sent to the HEI from the SLC in October and November of each academic year.

Use the Import ACR/SISF (SFA_SLC_RC_ACR) component to set up and run the batch import of ACR/SISF files.

The process looks at the value in the **File Type** field to identify the type of file that is being imported.

The Import ACR/SISF process:

1. Loads the data into a system table.
2. Attempts to match on SSN:
   - If a match exists, the record is loaded to the application table for use in the system.
   - If no SSN match exists, the process attempts to match using Search/Match criteria designated in Student Loans Company Setup component.

     If a match exists, the record is loaded to the application table for use in the system.

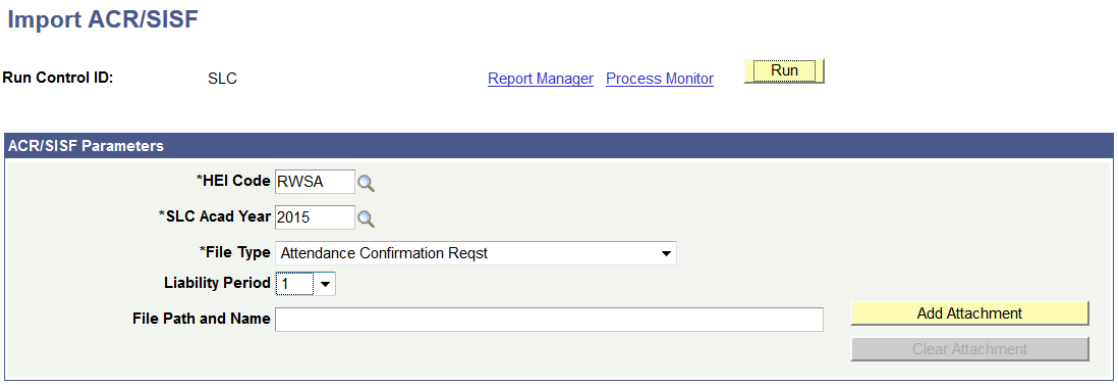
Page Used to Load ACR and SISF Files

Page Name	Definition Name	Navigation	Usage
Import ACR/SISF	SFA_SLC_RC_ACR	**Financial Aid**, and then **Student Loans Company**, and then **Import ACR/SISF**, and then **Import ACR/SISF**	Load ACR and SISF files.

Loading ACR and SISF Files

Access the Import ACR/SISF page (**Financial Aid**, and then **Student Loans Company**, and then **Import ACR/SISF**, and then **Import ACR/SISF**).

This example illustrates the fields and controls on the Import ACR/SISF page. You can find definitions for the fields and controls later on this page.



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ACR/SISF Parameters

Field or Control	Description
File Type	Select the **File Type** you want to import: • Attendance Confirmation Reqst (attendance confirmation request). • Extended SISF. • Short Course Attendance. • Student Information Service.
Liability Period	Select the Liability Period for which you want to import ACR data. This field is required if you select a **File Type** of *Attendance Confirmation Reqst*. The **Liability Period** should be set to **1** for Short Course Attendance files. Either an Attendance Confirmation Request file **or** a Short Course Attendance file can be imported for a particular Issue Data and Liability Period but not both. Ensure that the Export Creation Date for a Short Course Attendance file doesn't conflict with the Issue Data of an Attendance Confirmation Request file that has already been imported.

Managing ACR and SISF Suspensions

This section provides an overview of ACR and SISF suspensions and discusses how to review and manage unmatched or unprocessed ACR and SISF data.

Understanding ACR and SISF Suspensions

Use the Manage ACR/SISF Suspense (SFA_SLC_ACR_DTL) component to review and manage unmatched or unprocessed ACR and SISF data.

The system does not provide an option for adding a new person to the system as a result of reviewing unmatched or unprocessed data.

Also, this process does not update Campus Community Person biographic and demographic data.

Page Used to Review and Manage Unmatched or Unprocessed ACR and SISF Data

Page Name	Definition Name	Navigation	Usage
Manage ACR/SISF Suspense	SFA_SLC_ACR_DTL	**Financial Aid**, and then **Student Loans Company**, and then **Manage ACR/SISF Suspense**, and then **Manage ACR/SISF Suspense**	Review and manage unmatched or unprocessed ACR and SISF data.

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Reviewing and Managing Unmatched or Unprocessed ACR and SISF Data

Access the Manage ACR/SISF Suspense page (**Financial Aid**, and then **Student Loans Company**, and then **Manage ACR/SISF Suspense**, and then **Manage ACR/SISF Suspense**).

This example illustrates the fields and controls on the Manage ACR/SISF Suspense page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Manage ACR (Attendance Confirmation Report)/SISF (Student Information Service File) Suspense page 2 of 2.

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> **Note**
>
> For information about the **Status** field and the fields in the **Search Match** group box, refer to the documentation about the similar fields on the Manage SSAR Suspense page.

Field or Control	Description
File Type	Displays the **File Type**: • Attendance Confirmation Reqst (attendance confirmation request). • Extended SISF. • Short Course Attendance. • Student Information Service. If the value is *Extended SISF*, the **Extended SISF Data** group box appears.

Course/SLC Data

Field or Control	Description
Course Start Period	Displays the period when the course starts, for example *AUT (Autumn).*
Course Code	Displays the UCAS code or SLC code that is assigned to the course.
Student Status Date	Displays the date that the student status was assigned or updated.
New Record	Indicates whether the record appeared on a previous ACR/SISF.
Revision Indicator	Indicates whether the record has changed since a previous ACR/SISF.
Attendance Indicator	If an At Fee Code was returned in a previous ACR Response, it appears here.

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Running the ACR At Fee Evaluation Process

This section provides an overview of ACR At Fee Evaluation and discusses how to calculate the At Fee Code for ACR records.

Understanding ACR At Fee Evaluation

Use the ACR At Fee Evaluation (SFA_SLC_RC_ACR_EQ) component to determine the At Fee Code to be returned to the SLC in the file created by the ACR Export File process.

The ACR At Fee Evaluation process uses the **File Type** field to identify the imported file as ACR.

The ACR At Fee Evaluation process uses any equations defined in the **ACR Processing** group box in the Student Loans Company Setup component to populate variables that can be used by the At Fee Equation and also executes the At Fee Equation. The At Fee Equation populates a student's ACR Attendance Indicator (on the ACR/SISF page), which determines what At Fee Code is returned to the SLC with the ACR Response.

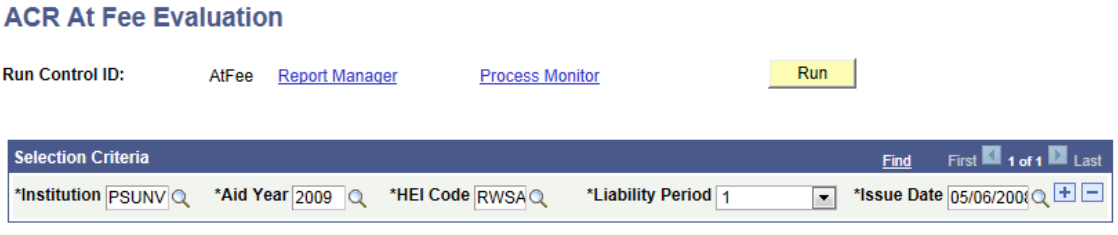
Page Used to Calculate the At Fee Code for ACR Records

Page Name	Definition Name	Navigation	Usage
ACR At Fee Evaluation	SFA_SLC_RC_ACR_EQ	**Financial Aid**, and then **Student Loans Company**, and then **ACR At Fee Evaluation**, and then **ACR At Fee Evaluation**	Calculate the At Fee Code value for ACR records.

Calculating the At Fee Code for ACR Records

Access the ACR At Fee Evaluation page (**Financial Aid**, and then **Student Loans Company**, and then **ACR At Fee Evaluation**, and then **ACR At Fee Evaluation**).

This example illustrates the fields and controls on the ACR At Fee Evaluation page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Liability Period	Select a Liability Period. You can run this process for multiple Liability Periods with the same Issue Date.
Issue Date	Enter the issue date of the ACR file that you want to evaluate.

The following table describes the At Fee Code values as defined by the SLC:

At Fee Code	Description
A	HEI agrees that the student is in attendance for the attendance date, course and course year shown and they agree with the Course Tuition Fee amount and the Liability (combination of Tuition Fee Loan and Student Pays). It is important that the HEI ensure that the fee liability is correct, because using code A results in the fee loan and/or grant showing on the Attendance Confirmation Report as being paid.
C	The student is in attendance at the institution but for a different course and/or year of course to those shown on the schedule. (For example, the year of course is shown as *2* on the schedule but the student is repeating the first year).
F	Student is in attendance; however the HEI disagrees with the course fee.
L	Student is in attendance at the HEI, for the course and course year indicated, however the HEI disagrees with the Liability (combination of Tuition Fee Loan and Student Pays) but undertakes to make reparations to the student such that the liability is correctly discharged and no overpayment of Tuition Fee support to that institution exists.
N	Student is in attendance at the HEI, for the course and course year indicated, however the HEI disagrees with the Liability (combination of Tuition Fee Loan and Student Pays) but does not undertake to make reparations to the student such that the liability would be correctly discharged and no overpayment of Tuition Fee support to that institution would exist.
X	Student is not in attendance on the relevant attendance date, except where the non attendance is due to the student suspending their studies.
S	Studies suspended.

Running the Calculate FTE Process

This section provides an overview of the Calculate FTE process for SLC.

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Understanding the Calculate FTE Process

Use the Calculate FTE (SSR_HE_CALC_FTE) component to calculate students' full-time equivalent enrollment for reporting via the ACR Response process.

In order to meet the reporting requirements of the SLC Attendance Confirmation Report (ACR) for part-time students, institutions must calculate a value that represents the student's academic load for the Aid Year expressed as a percentage of full-time equivalence (FTE). A student who has been studying full-time for the period is returned with an FTE of 100. A student studying part-time is returned with a value of less than 100 to represent the proportion of full-time study they have undertaken. For example, a student with half the load of a full-time student is returned with FTE of 50.

The FTE result is used by the Export ACR File process to determine whether the student with an Academic Load of part-time meets the 25% FTE threshold for ACR reporting. The determination of Full time and Part time Academic load is based upon the HESA Mode of Study value mapping.

Page Used to Calculate FTE

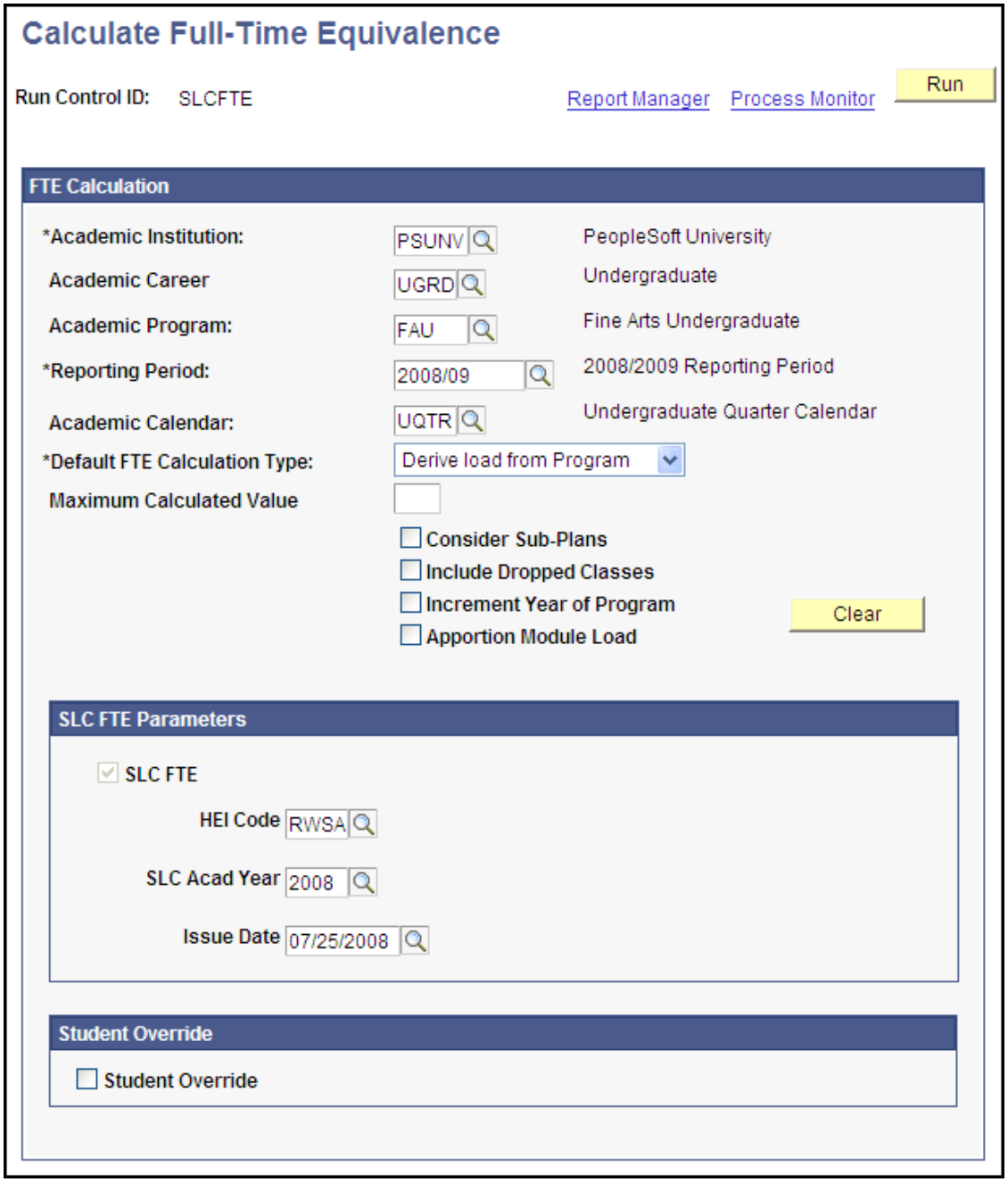
Page Name	Definition Name	Navigation	Usage
Calculate Full-Time Equivalence	SSR_HE_CALC_FTE	**Financial Aid**, and then **Student Loans Company**, and then **Calculate FTE**, and then **Calculate SLC FTE**	Calculate FTE for students for reporting with the ACR response.

Calculating FTE for SLC Reporting

Access the Calculate Full-Time Equivalence page (**Financial Aid**, and then **Student Loans Company**, and then **Calculate FTE**, and then **Calculate SLC FTE**).

This example illustrates the fields and controls on the Calculate Full-Time Equivalence page. You can find definitions for the fields and controls later on this page.

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This process uses the same FTE logic as the FTE process for student records with the addition of the **SLC FTE Parameters** to determine if there is an ACR record which requires a response. For more information about calculating FTE for HESA and SLC:

See Student Records: Calculating Full-Time Equivalence for Students.

For this process to calculate the FTE for SLC ACR reporting properly, you should follow the set up guidelines in the (GBR) Setting Up Student Loans Company.

In the **SCL FTE Parameters** group box, all 3 parameters, **HEI Code**, **SLC Acad Year**, and **Issue Date** are required.

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Related Topics

- Completing Prerequisites for SLC FTE Calculation
  This section discusses the Campus Solution Student Records and Enrollment HESA (Higher Education Statistics Agency) setup required to use the SLC FTE Calculation.

Exporting the ACR Response File

This section provides an overview of the ACR Response File and discusses how to export the ACR Response File.

Understanding the ACR Response File

Use the Export ACR File (SFA_SLC_RC_ACR_EXP) component to create an extract file to send to the SLC.

The Export ACR File process uses the **Issue Date and Liability Period** to identify the record as either Attendance Confirmation Record (ACR) or Short Course Attendance (SCA).

The Export ACR File process creates the ACR Response File using the values in the **Attendance Indicator** field. This field contains the At Fee Code values.

The process does not export a SISF.

The process does not create a file for an ACR for which a previous response has been created.

Page Used to Export the ACR Response File

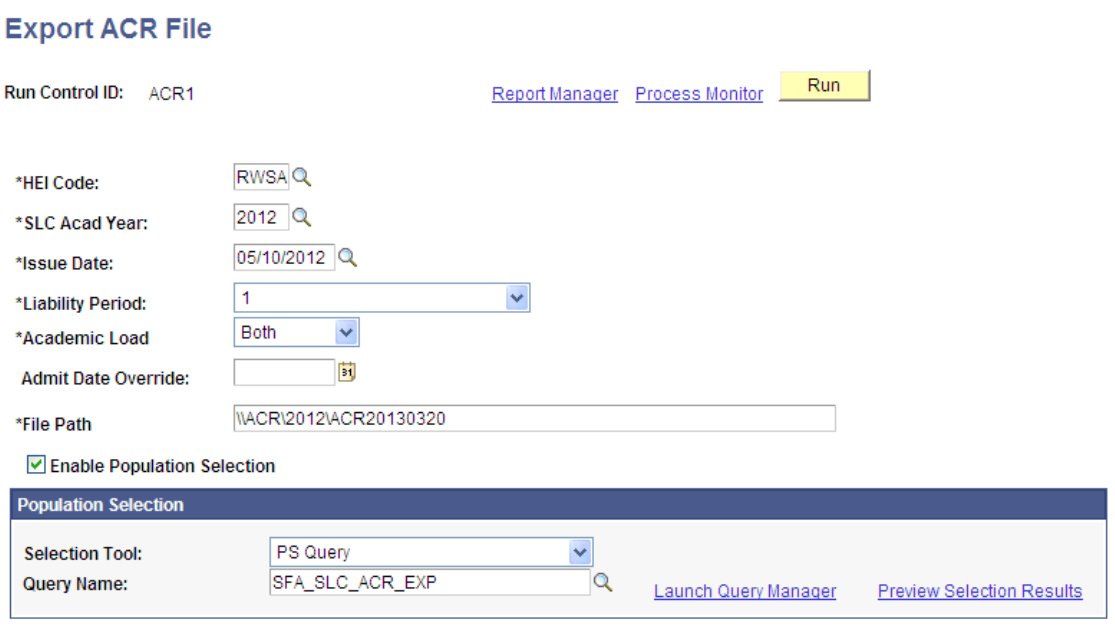
Page Name	Definition Name	Navigation	Usage
Export ACR File	SFA_SLC_RC_ACR_EXP	**Financial Aid**, and then **Student Loans Company**, and then **Export ACR File**, and then **Export ACR File**	Export the ACR Response file.

Exporting the ACR Response File

Access the Export ACR File page (**Financial Aid**, and then **Student Loans Company**, and then **Export ACR File**, and then **Export ACR File**).

This example illustrates the fields and controls on the Export ACR File page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Issue Date	Enter the issue date of the ACR file that you want to process.
Liability Period	Select the SLC Liability Period for which you are reporting.
Academic Load	Select the Academic Load that you are reporting: *Full-time*, *Part-time*, *Both*, or *None*.
Admit Date Override	Enter an alternative Admit Term Start Date here if you want to export information for a part-time population with an Admit Term Start Date prior to September 1, 2012. The **Admit Date Override** field is activated when the selected **Academic Load** is *Part-time* or *Both*.
File Path	Enter a path to indicate where to store the extract file.
Enable Population Selection	Select this check box to activate additional Population Selection parameters if you want to define your own population selection criteria for this process. This is optional.

Related Topics

- Campus Community Fundamentals: Using the Population Selection Process

Importing Remittance Report Files

This section provides an overview of Remittance Report files and discusses how to load Remittance Report files.

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Understanding Remittance Report Files

Remittance reports are sent to the HEI from the SLC and correspond with the receipt of Tuition Fee payments from the SLC to the HEI. These reports do not require a response from the HEI.

The major Remittance Report files are sent to the HEI from the SLC in February and April of each academic year. The HEI might also receive additional Remittance Report files that contain adjustments to the data that was previously sent.

Use the Import Remittance Report Files (SFA_SLC_RC_TFRA) component to load Remittance Report files to a staging table and use them for reconciliation with system data.

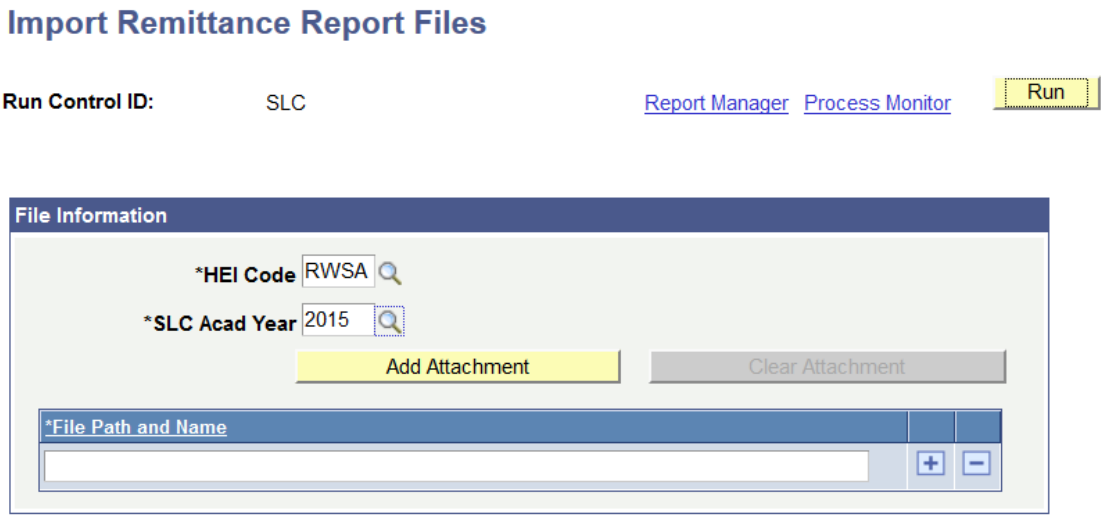
Page Used to Load Remittance Report Files

Page Name	Definition Name	Navigation	Usage
Import Remittance Report Files	SFA_SLC_RC_TFRA	**Financial Aid**, and then **Student Loans Company**, and then **Import Remittance Report Files**, and then **Import Remittance Report Files**	Load Remittance Report files.

Loading Remittance Report Files

Access the Import Remittance Report Files page (**Financial Aid**, and then **Student Loans Company**, and then **Import Remittance Report Files**, and then **Import Remittance Report Files**).

This example illustrates the fields and controls on the Import Remittance Report Files page.



Viewing Remittance Staging Data

This section discusses how to view Remittance imported data.

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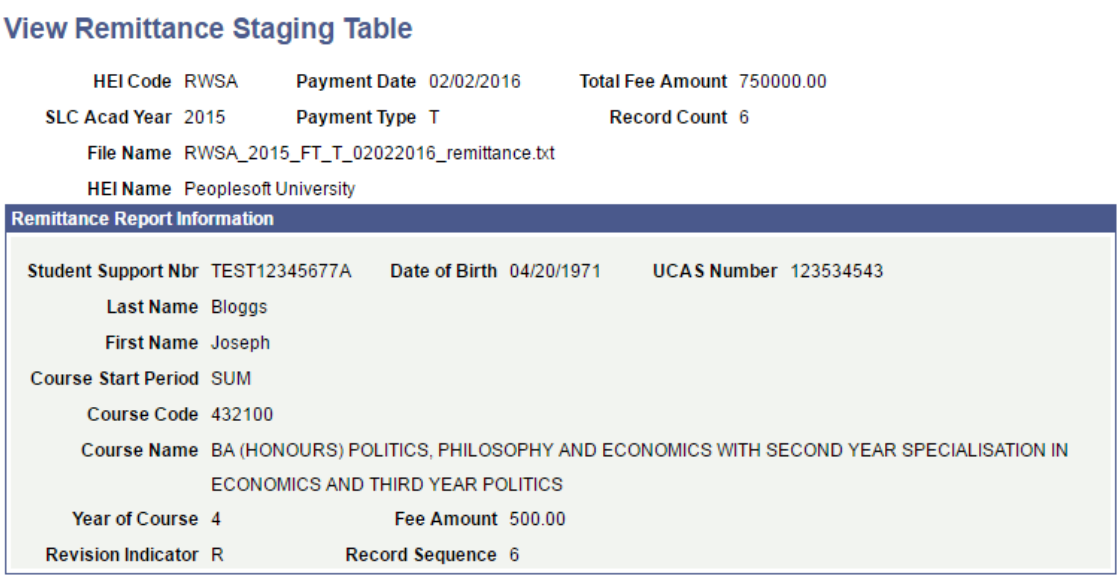
Page Used to View Remittance Imported Data

Page Name	Definition Name	Navigation	Usage
View Remittance Staging Table	SFA_SLC_TFRA_DTL	**Financial Aid**, and then **Student Loans Company**, and then **View Remittance Staging Table**, and then **View Remittance Staging Table**	View Remittance imported data.

Viewing Remittance Imported Data

Access the View Remittance Staging Table page (**Financial Aid**, and then **Student Loans Company**, and then **View Remittance Staging Table**, and then **View Remittance Staging Table**).

This example illustrates the fields and controls on the View Remittance Staging Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Payment Date	Displays the date that the funds are transferred to HEI.
Payment Type	Displays the type of funds being transferred: • *T: Loan* • *G: Grant* This field is blank if the information was not provided in the Remittance Report file.
Total Fee Amount	Displays the total net amount of fees in this roster.

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Field or Control	Description
Record Count	Displays the total number of records in this roster.

Remittance Report Information

Field or Control	Description
Course Start Period	Displays the period when the course starts, for example *AUT (Autumn).*
Course Code	Displays the UCAS code that is assigned to the course.
Revision Indicator	Indicates a change in entitlement since a previous ACR.
Fee Amount	Displays the fee amount for the student.

Viewing SLC Student Data

This section discusses how to:

- View SSAR student data.
- View SSAR name and address data.
- View SSAC student data.
- View SSAC export data.
- View ACR and SISF data.
- View Attendance Confirmation by Liability Period.
- View HEBSS student data.

Pages Used to View Student Data

Page Name	Definition Name	Navigation	Usage
SSAR	SFA_SLC_SSAR	**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **SSAR**	View SSAR data.
SLC SSAR Name and Address	SFA_SLC_SSAR_SEC	Click the **Name/ Address** link on the SSAR page.	View SSAR name and address data.
SSAC	SFA_SLC_SSAC	**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **SSAC**	View SSAC student data.

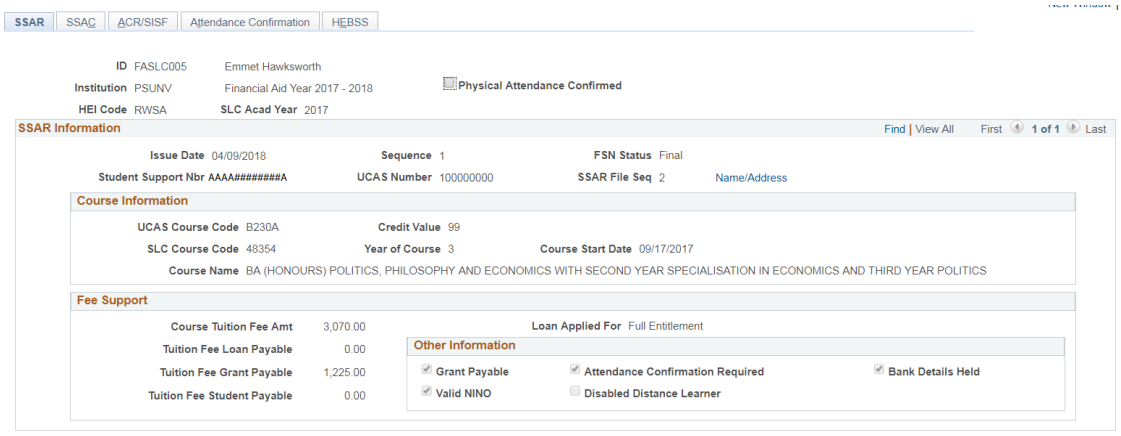
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Page Name	Definition Name	Navigation	Usage
View SSAC Export Data	SFA_SLC_SSAC_DTL	**Financial Aid**, and then **Student Loans Company**, and then **View Exported SSAC Data**	View SSAC export data.
ACR/SISF	SFA_SLC_ACR	**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **ACR/SISF**	View ACR and SISF student data.
Attendance Confirmation	SFA_SLC_ATD_CFR	**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **Attendance Confirmation**	View Attendance Confirmation data for SLC Liability Period.
HEBSS	SFA_SLC_HEBSS	**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **HEBSS**	View HEBSS student data.
SLC HEBSS Name and Address	SFA_SLC_HEBSS_SEC	Click the **Name/Address** link on the HEBSS page.	View HEBSS name and address data.

Viewing SSAR Student Data

Access the SSAR page (**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **SSAR**).

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



Use this page to view the details of students' SSAR records. The page is view-only with the exception of the **Tuition Fee Loan Payable** and **Tuition Fee Grant Payable** fields. These fields can be updated for Scottish students whose SSNs begin with SAAS.

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Field or Control	Description
Physical Attendance Confirmed	Select this check box to indicate that a student's physical attendance on the campus has been confirmed. This check box can be selected on this page or set by the institution's custom process.

SSAR Information

Field or Control	Description
Issue Date	Displays the issue date of the SSAR.
Sequence	Displays the internal sequence number used to indicate the version of the individual student's SSAR file.
SSAR File Seq (Student Support Attendance Requests file sequence number)	Displays the sequence number, which is unique within the SLC for the HEI, academic year, and file type.

Fee Support

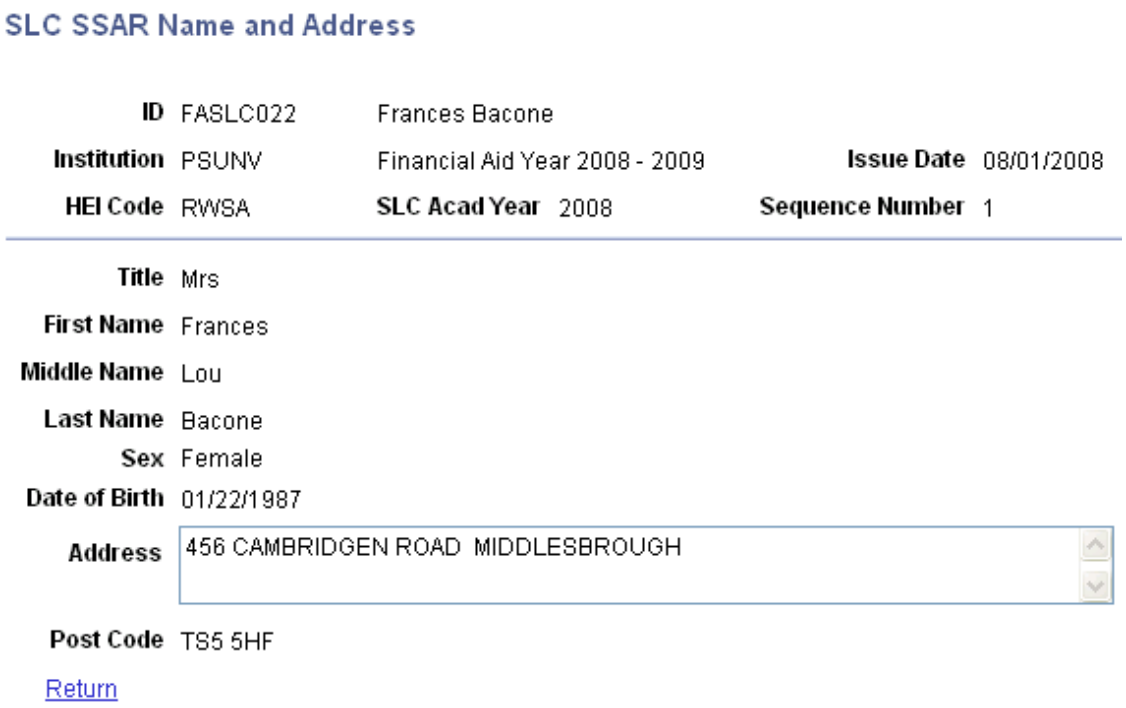
Field or Control	Description
Tuition Fee Loan Payable	Displays the portion of the fee paid by TFL. **Note:** You can update this field for Scottish students whose SSNs begin with SAAS.
Tuition Fee Grant Payable	Displays the portion of the fee paid by the TFG. **Note:** You can update this field for Scottish students whose SSNs begin with SAAS.
Loan Applied For	Displays the type of loan for which the student applied. Values are: • *F (Full Entitlement)* • *P (Part Entitlement)* • *N (No loan applied for)*

Viewing SSAR Name and Address Data

Access the SLC SSAR Name and Address page (click the **Name/Address** link on the SSAR page).

This example illustrates the fields and controls on the SLC SSAR Name and Address page.

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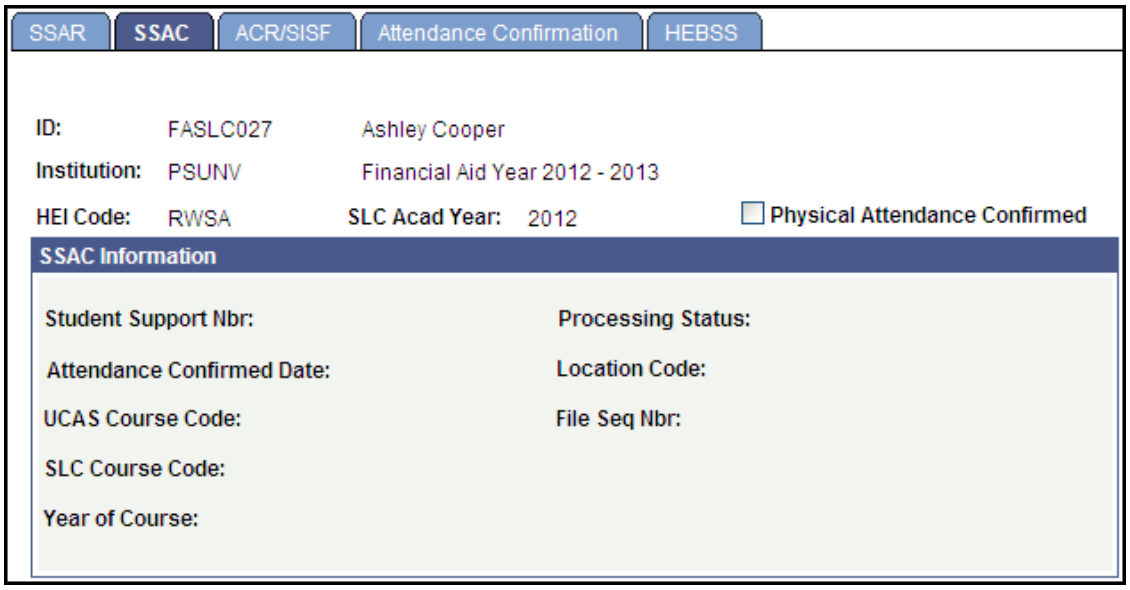


Use this page to help determine whether you are matching to the correct person.

Viewing SSAC Student Data

Access the SSAC page (**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **SSAC tab**).

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



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You can view the details of SSAC data for students on this page. This page is view-only with the exception of the **SLC Course Code** and **Year of Course** fields. These fields can be updated after the SSAC data is populated but before exporting the data. After the SSAC data is exported, these fields are also view-only.

Field or Control	Description
Physical Attendance Confirmed	Select this check box to indicate that a student's physical attendance on the campus has been confirmed. This check box can be selected on this page or set by the institution's custom process.

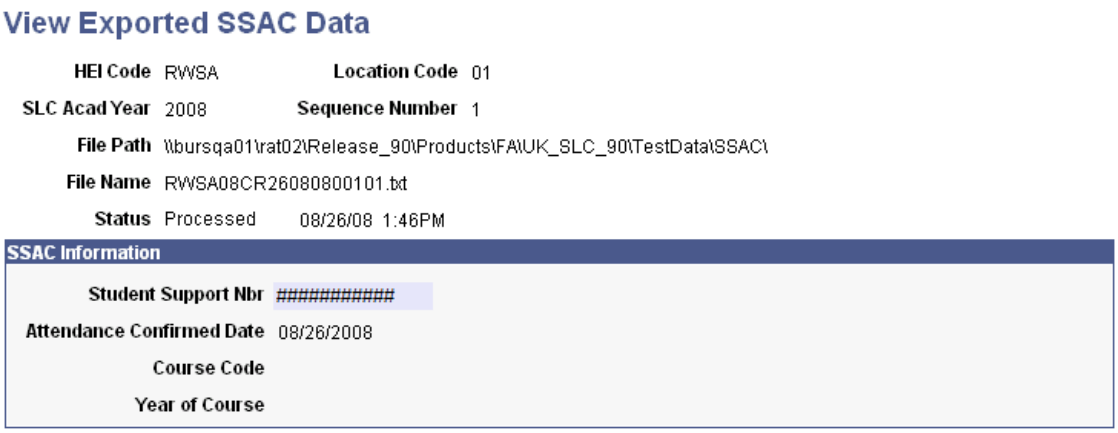
SSAC Information

Field or Control	Description
Processing Status	A status of *Processed* indicates that the SSAC data has been exported to a file. A status of *Unprocessed* indicates that the SSAC data has not been exported to a file.
Attendance Confirmed Date	Displays the date that the **Physical Attendance Confirmed** check box was selected for the student.
Location Code	Displays a two-digit location code representing a specific location at the HEI. The default value is *01* and the range is *01* to *99*.
File Sequence Nbr (file sequence number)	Displays an internal sequence number.

Viewing SSAC Export Data

Access the View Exported SSAC Data page (**Financial Aid**, and then **Student Loans Company**, and then **View Exported SSAC Data**).

This example illustrates the fields and controls on the View Exported SSAC Data page. You can find definitions for the fields and controls later on this page.



Use this page to view the details of the students' exported SSAC data.

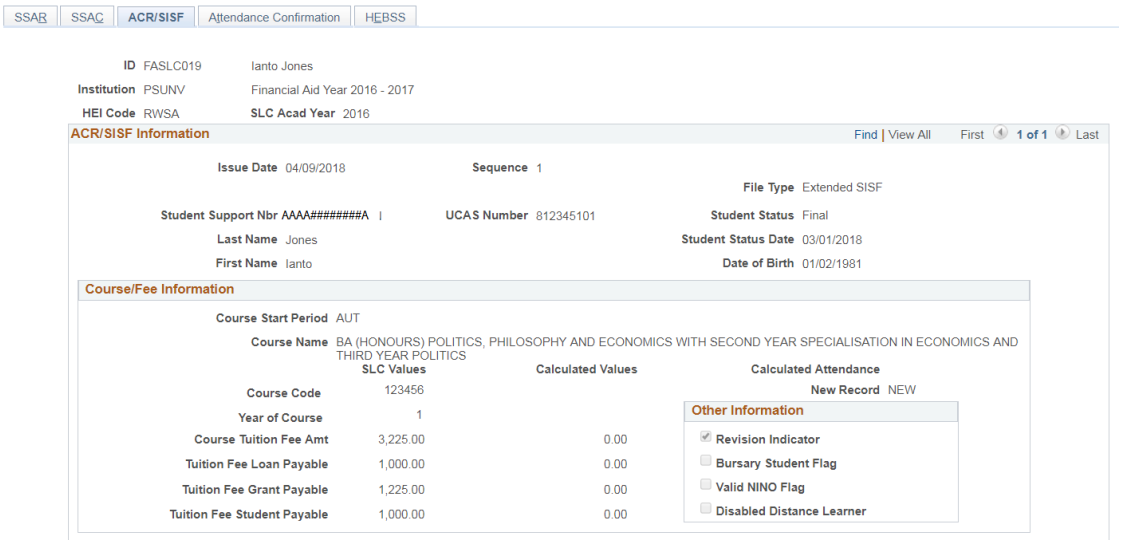
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Field or Control	Description
Attendance Confirmed Date	Displays the date that the **Physical Attendance Confirmed** check box was selected for the student.

Viewing ACR and SISF Student Data

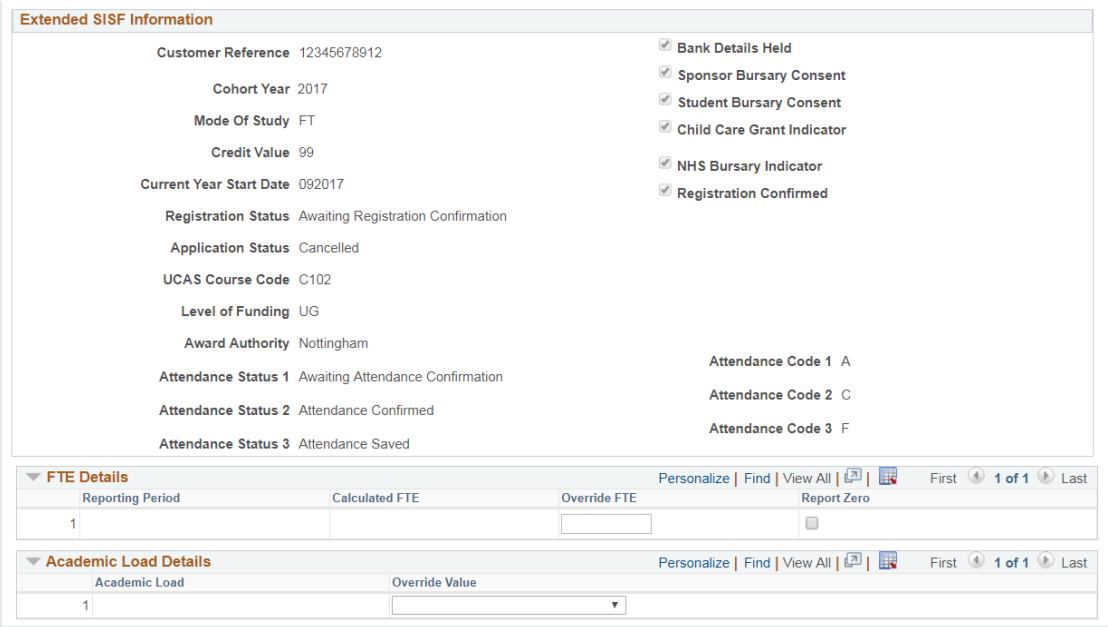
Access the ACR/SISF page (**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **ACR/SISF tab**).

This example illustrates the fields and controls on the ACR/SISF page 1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the ACR/SISF page 2 of 2). You can find definitions for the fields and controls later on this page.

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Use this page to view the details of ACR or SISF data for students.

All fields on this page, except for the **Attendance Indicator** field, are view-only.

ACR/SISF Information

Field or Control	Description
Issue Date	Displays the date that the ACR/SISF was issued.
Attendance Indicator	This field appears only if the value in the **File Type** field is *Attendance Confirmation Reqst.* The field contains a list of At Fee Code values that can be manually set on this page. You can manually set this field instead of running the Evaluate ACR process.
File Type	Displays the **File Type**: • Attendance Confirmation Reqst (attendance confirmation request). • Extended SISF. • Short Course Attendance. • Student Information Service. If the value is *Extended SISF*, the **Extended SISF Data** group box appears.
Student Status Date	Displays the date that the student's status was assigned or updated.

Course/Fee Information

Field or Control	Description
Course Start Period	Displays the period when the course starts, for example *AUT (Autumn).*

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Field or Control	Description
New Record	Indicates whether the record appeared on a previous ACR.
Course Code	Displays the UCAS code or SLC code that is assigned to the course. **Note:** For this field, and the remaining fields in this group box, values appear in both the **SLC Values** and **Calculated Values** columns. The values in the **SLC Values** column come from the context ACR or SISF record. The values in the **Calculated Values** column appear after the ACR At Fee Evaluation process is run.

Other Information

Field or Control	Description
Revision Indicator	Indicates whether the record has changed since a previous ACR/SISF.

FTE Details

Field or Control	Description
Override FTE	Enter a value here and save to override the **Calculated FTE**.
Report Zero	Select this check box to report FTE of zero.

> **Note**
>
> Once you have overridden a student's FTE or selected **Report Zero** for a student's FTE for a Liability Period then that overridden or zero value remains until manually removed, even if the Calculate FTE process is rerun.

Academic Load Details

Field or Control	Description
Academic Load	Displays the student's **Academic Load** from the ACR.
Override Value	Enter a value here and save to override the student's **Academic Load**.

Viewing Attendance Confirmation Data by Liability Period

Access the Attendance Confirmation page (**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **Attendance Confirmation tab**).

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

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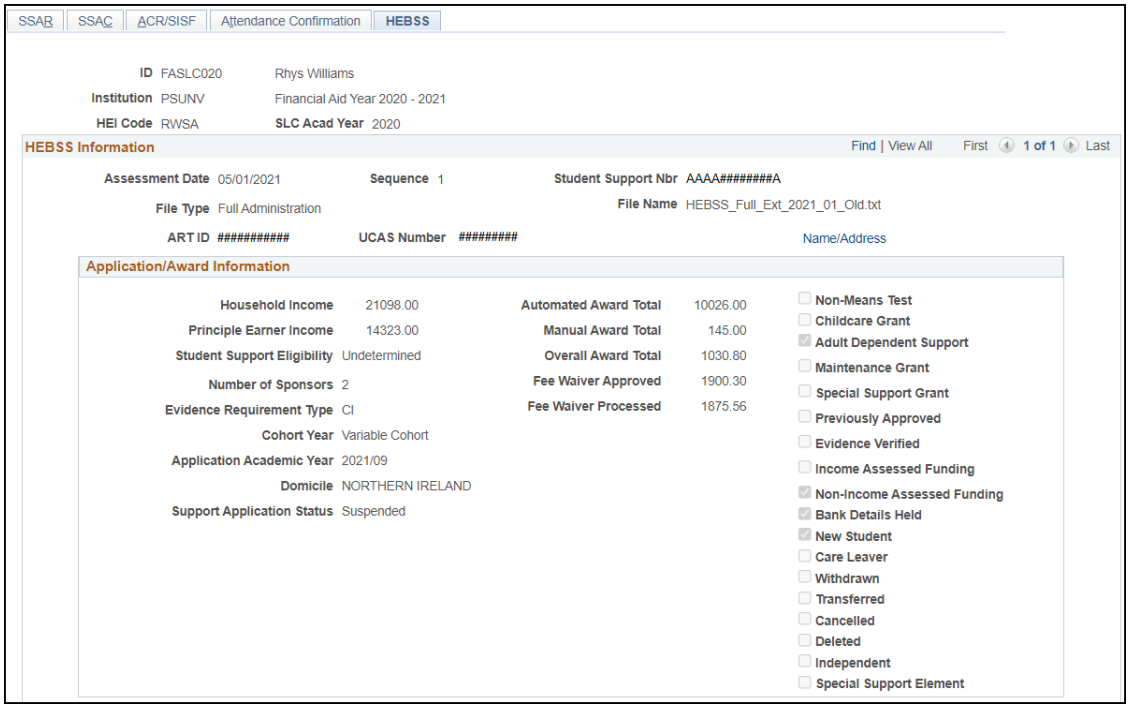


You can use this page to view details of attendance confirmation file information sent for the three SLC Liability Periods. There is a group box for each of the Liability Periods: **Attendance Reporting 1**, **Attendance Reporting 2**, and **Attendance Reporting 3**.

Viewing HEBSS Student Data

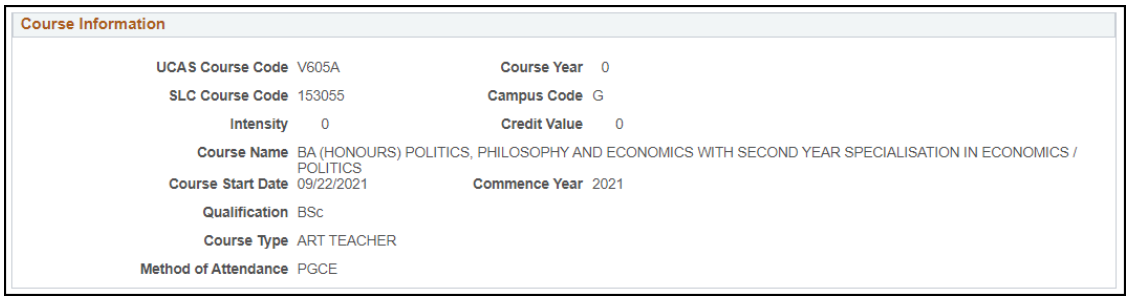
Access the HEBSS page (**Financial Aid**, and then **Student Loans Company**, and then **View SLC Student Data**, and then **HEBSS tab**).

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



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This example illustrates the fields and controls on the HEBSS page (2 of 2). You can find definitions for the fields and controls later on this page.



You can view the details of the student's HEBSS data on this page. This page is view-only.

> **Note**
>
> For information about the fields in the **Application/Award Information** group box, refer to the information about the group box in the Manage HEBSS Suspensions section.

HEBSS Information

Field or Control	Description
Assessment Date	Displays the date the customer record was entered or updated on the Higher Education (HE) portal.
File Name	Displays the data file name from SLC.

Course Information

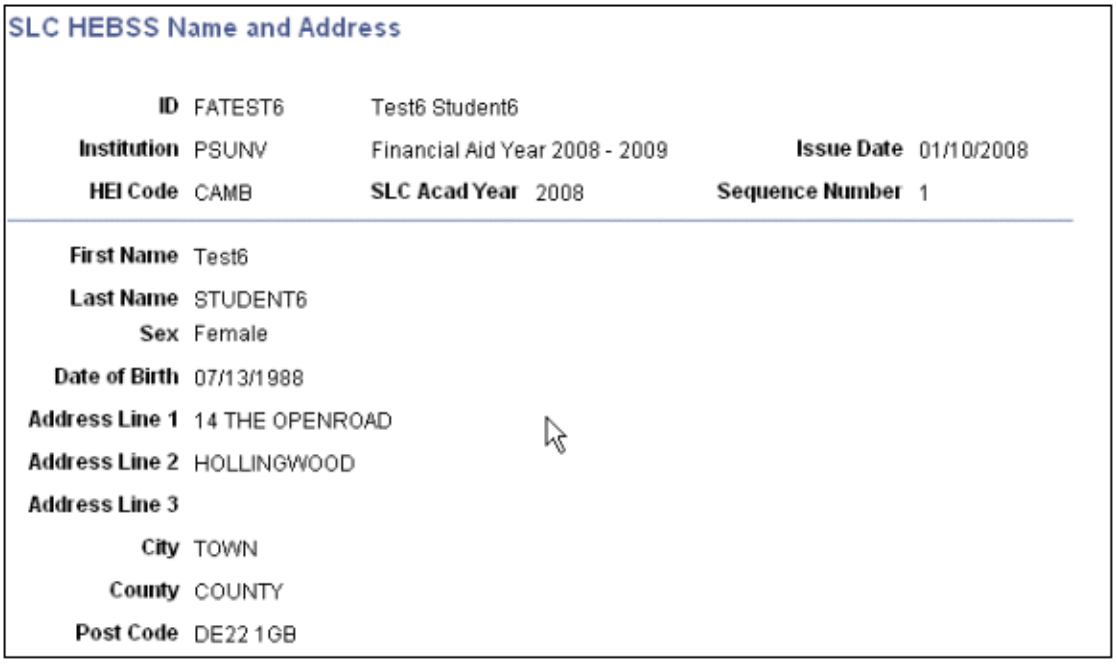
Field or Control	Description
Qualification	Displays the qualification achieved.
Method of Attendance	Displays the method of attendance. Values are: • *Full Time* • *Part Time* • *PGCE* (post graduate)

Viewing HEBSS Name and Address Data

Access the SLC HEBSS Name and Address page (click the **Name/Address** link on the HEBSS page).

This example illustrates the fields and controls on the SLC HEBSS Name and Address page.

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Use this page to help determine whether you are matching to the correct person.

Reconciling Tuition Fee Payments

This section provides an overview of reconciling Tuition Fee payments to HEI's from the SLC and discusses how to:

- View the Remittance Report File Summary.
- View Remittance Data to Student Award Data Comparison.
- View Student Award Details.
- View FA Disbursement Data to SF Item Data Comparison.
- View FA/SF Details.

Understanding Tuition Fee Payments Reconciliation

You can configure the system to use SLC Tuition Fee Loan and Tuition Fee Grant payment data to pay students' tuition fees. HEI's can use the system to reconcile actual payments received from the SLC, represented by Remittance Report file data, with payments that have been made to students.

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Pages Used to Reconcile Tuition Fee Payments

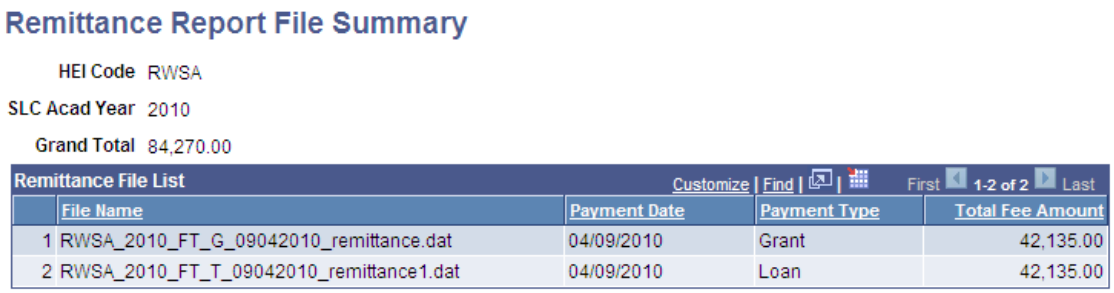
Page Name	Definition Name	Navigation	Usage
Remittance Report File Summary	SFA_SLC_TFRA_SUMRY	**Financial Aid**, and then **Student Loans Company**, and then **Remittance Report File Summary**, and then **Remittance Report File Summary**	View the Remittance Report files that have been loaded for a HEI/SLC academic year.
Remittance Reconciliation	SFA_SLC_TFRA_RECON	**Financial Aid**, and then **Student Loans Company**, and then **Remittance Reconciliation**, and then **Remittance Reconciliation**	View a comparison of Remittance data and Student Award Data for an Institution/Aid Year/HEI, which maps to the HEI/SLC academic year.
Remittance /Student Awards	SFA_SLC_TFRA_AWARD	**Financial Aid**, and then **Student Loans Company**, and then **Remittance Reconciliation**, and then **Remittance/ Student Awards**	View the details for student remittance and award data.
Disbursement Reconciliation	SFA_DISB_SF_RECON	**Financial Aid**, and then **Student Loans**, and then **Company**, and then **Disbursement Reconciliation**, and then **Disbursement Reconciliation**	View a comparison of FA Disbursement data and SF Item data.
FA/SF Details	SFA_DISB_SF_RECON1	**Financial Aid**, and then **Student Loans Company**, and then **Disbursement Reconciliation**, and then **FA/SF Details**	View the details for student Financial Aid Disbursement data and Student Financials Item data.

Viewing the Remittance Report File Summary

Access the Remittance Report File Summary page (**Financial Aid**, and then **Student Loans Company**, and then **Remittance Report File Summary**).

This example illustrates the fields on the Remittance Report File Summary page.

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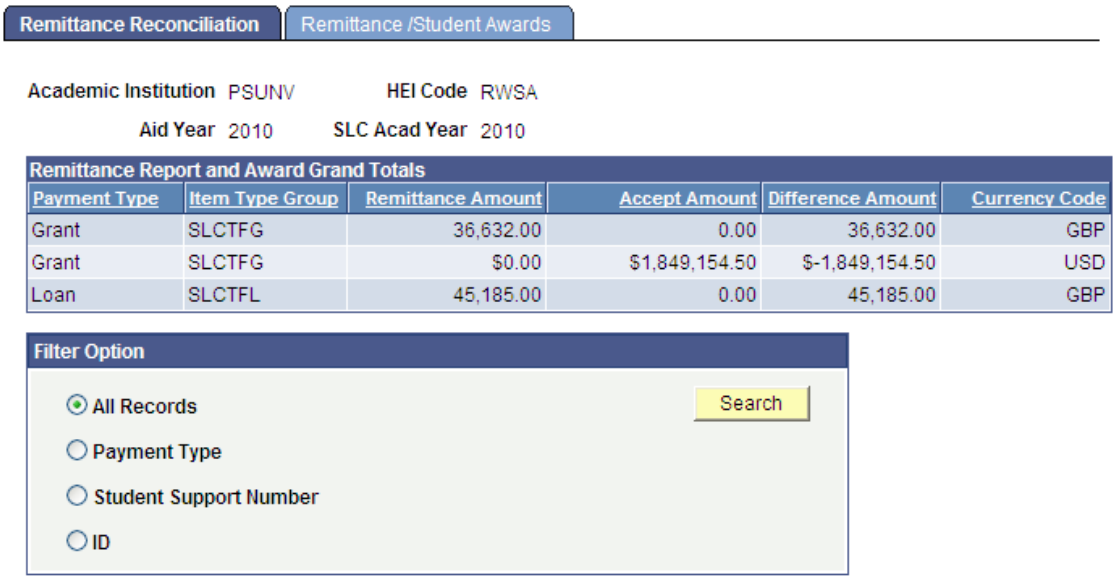


Use this page to learn which files have been loaded for the current HEI and SLC academic year.

Viewing the Remittance Data to Student Award Data Comparison

Access the Remittance Reconciliation page (**Financial Aid**, and then **Student Loans Company**, and then **Remittance Reconciliation**).

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



Use this page to compare Remittance data to Student Award Data for a particular institution, aid year, and HEI combination.

Remittance Report and Award Grand Totals

This group box lists the totals by payment type, such as grant or tuition. The page uses the values in the **Remittance Report Parameters** group box on the Student Loans Company Setup - Options page to associate item type groups with payment types.

Filter Option

Use the **Filter Option** group box to filter results by **Payment Type, Student Support Number,** or **ID.** Click the **Search** button to access the Remittance /Student Awards page.

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Viewing Student Award Details

Access the Remittance/Student Awards page (**Financial Aid**, and then **Student Loans Company**, and then **Remittance Reconciliation**, and then **Remittance/Student Awards**).

This example illustrates the fields and controls on the Remittance/Student Awards page. You can find definitions for the fields and controls later on this page.

Remittance Reconciliation | Remittance /Student Awards

Academic Institution PSUNV HEI Code RWSA

Aid Year 2010 SLC Acad Year 2010

Remittance Report Records with no Student ID or Awards Customize | Find | View All | First 1-10 of 35 Last

Student Information | Course Information | Other Information

	ID	Student Support Nbr	Last Name	First Name	Remittance Amount	Payment Type
1	FASLC011	##############	Lucas	Dick	1,500.00	Grant
2	FASLC011	##############	Lucas	Dick	1,225.00	Loan
3	FASLC012	##############	Harman	Beverley	3,100.00	Grant
4	FASLC012	##############	Harman	Beverley	3,000.00	Loan
5		##############	Grainger	Ernest	1,578.00	Grant
6		##############	Grainger	Ernest	3,070.00	Loan
7	FASLC014	##############	Spooner	Bert	1,100.00	Grant
8	FASLC014	##############	Spooner	Bert	1,225.00	Loan
9	FASLC015	##############	Harkness	Jack	2,324.00	Grant
10	FASLC015	##############	Harkness	Jack	3,070.00	Loan

Student Awards with no Remittance Report Data Customize | Find | View 100 | First 1-15 of 237 Last

	ID	Student Support Nbr	Name	Item Type Group	Accept Amount	Disbursed Amount
1	FA0861		Eberhart,Katie A	SLCTFG	$3,950.00	$0.00
2	FA0862		Asby,Aisha T	SLCTFG	$4,000.00	$0.00
3	FA0864		Ramirez,Ana L	SLCTFG	$0.00	$0.00
4	FA0866		Carr,Shane P	SLCTFG	$3,950.00	$0.00
5	FA0867		Murray,Rebecca F	SLCTFG	$0.00	$0.00
6	FA0869		Minor,James Z	SLCTFG	$0.00	$0.00
7	FA0871		Carter,Raven R	SLCTFG	$0.00	$0.00
8	FAAG0001		Benning,Angel H	SLCTFG	$1,000.00	$1,500.00
9	FAAG0002		Page,Abbey G	SLCTFG	$4,110.00	$600.00
10	FAAG0007		Peters,Kenneth W	SLCTFG	$0.00	$0.00
11	FAAG0008		Billington,Jon H	SLCTFG	$0.00	$0.00
12	FAAG0010		Hanning,Tristi N	SLCTFG	$0.00	$0.00
13	FAAG0011		Frost,Liane S	SLCTFG	$0.00	$0.00
14	FAAG0019		Quinton,Nancy H	SLCTFG	$0.00	$0.00
15	FAAG0020		Young,Jillian K	SLCTFG	$0.00	$0.00

Remittance Report and Award Data Comparison Customize | Find | View All | First 1 of 1 Last

	ID	Student Support Nbr	Payment Type	Remittance Amount	Accept Amount	Difference	Disbursed Amount
1	FAPKPEL0058	RCHD07000012N	Grant	2,770.00	12,850.00	-10,080.00	0.00

Remittance Report Records with no Student ID or Awards

This group box lists Remittance Report data that is not associated with a student ID or does not have a matching SLC Financial Aid Award. For example, a Remittance Report record was received but could not be matched with a student in the system. Or a Remittance Report record with a Student Support Number is matched to a student ID, but that student does not have any SLC Financial Aid Awards. You can view details about the Remittance Report

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records in this group box by clicking on the Student Information, Course Information, and Other Information tabs.

Student Awards with no Remittance Report Data

This group box lists students who have SLC Financial Aid awards that do not have matching Remittance Report data.

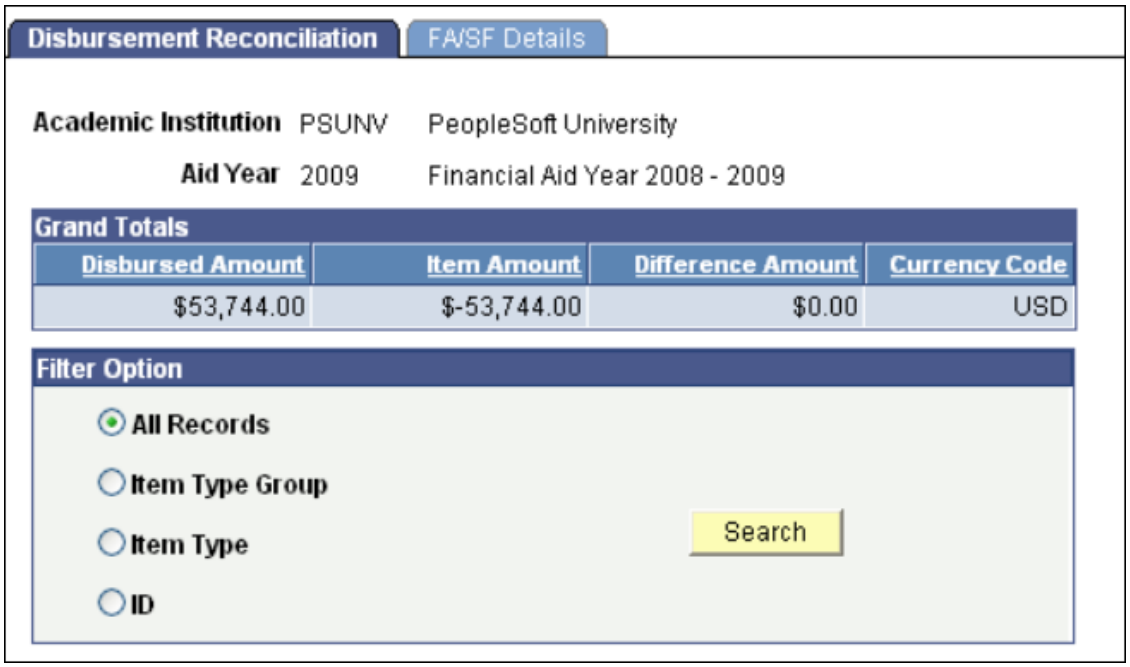
Remittance Report and Award Data Comparison

This group box lists students who have Remittance Report data and SLC Financial Aid award data and displays differences, if any, between the two.

Viewing the FA Disbursement Data to SF Item Data Comparison

Access the Disbursement Reconciliation page (**(Financial Aid**, and then **Student Loans Company**, and then **Disbursement Reconciliation**).

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



Use this page to compare Financial Aid disbursement data to Student Financials item data.

Filter Option

Use the **Filter Option** group box to filter results by **Item Type Group, Financial Aid Item Type,** or **ID.** Press the **Search** button to access the FA/SF Details page.

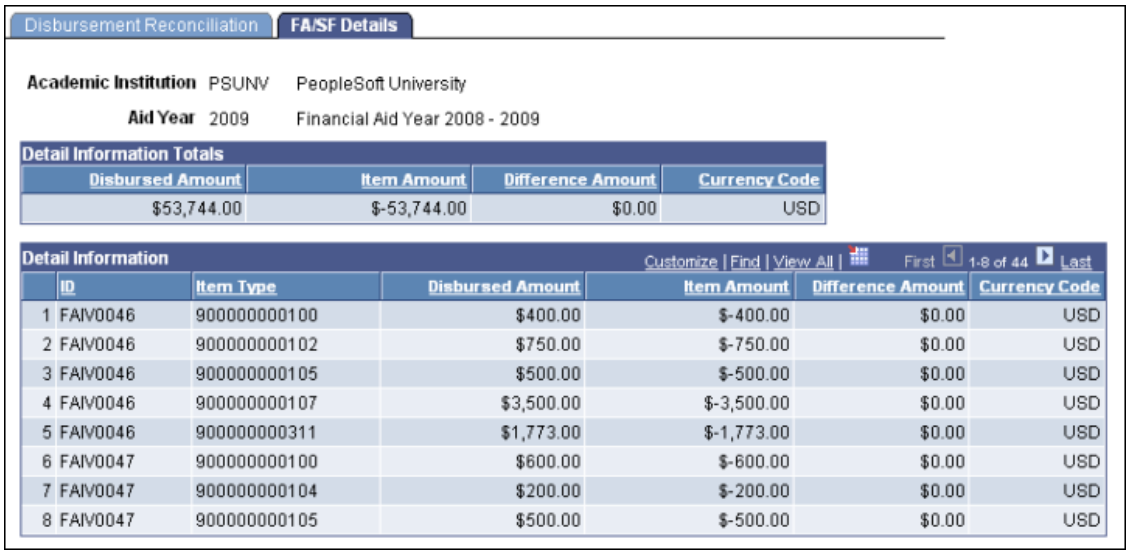
> **Note**
>
> You can use this page to access information about any Financial Aid Item Types. It is not limited to SLC Item Types.

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Viewing FA/SF Details

Access the FA/SF Details page (**Financial Aid**, and then **Student Loans Company**, and then **Disbursement Reconciliation**, and then **click Search**).

This example illustrates the fields and controls on the FA/SF Details page.



Disbursement Reconciliation | FA/SF Details

Academic Institution PSUNV PeopleSoft University

Aid Year 2009 Financial Aid Year 2008 - 2009

Detail Information Totals

Disbursed Amount	Item Amount	Difference Amount	Currency Code
$53,744.00	$-53,744.00	$0.00	USD

Detail Information Customize | Find | View All | First 1-8 of 44 Last

	ID	Item Type	Disbursed Amount	Item Amount	Difference Amount	Currency Code
1	FAIV0046	900000000100	$400.00	$-400.00	$0.00	USD
2	FAIV0046	900000000102	$750.00	$-750.00	$0.00	USD
3	FAIV0046	900000000105	$500.00	$-500.00	$0.00	USD
4	FAIV0046	900000000107	$3,500.00	$-3,500.00	$0.00	USD
5	FAIV0046	900000000311	$1,773.00	$-1,773.00	$0.00	USD
6	FAIV0047	900000000100	$600.00	$-600.00	$0.00	USD
7	FAIV0047	900000000104	$200.00	$-200.00	$0.00	USD
8	FAIV0047	900000000105	$500.00	$-500.00	$0.00	USD

Use this page to view disbursement details.

Updating HEI Course Database Data

This section provides an overview of the HEI Course Database and discusses how to exchange HEI Course Database data.

Understanding the HEI Course Database

HEIs in the United Kingdom report information on all their courses of study (programmes) to the SLC. This data must be updated annually.

The course data is general, such as costs or descriptions of courses of study, and is not specific to the student. The SLC uses this course data when processing students' applications for support.

The SLC provides an XML-based web service to exchange this information with HEIs. The SLC provides the current HEI Course Database data to the HEI, and the HEI must provide the SLC with updated information.

The SLC requests the HEI Course Database updates from HEIs each academic year.

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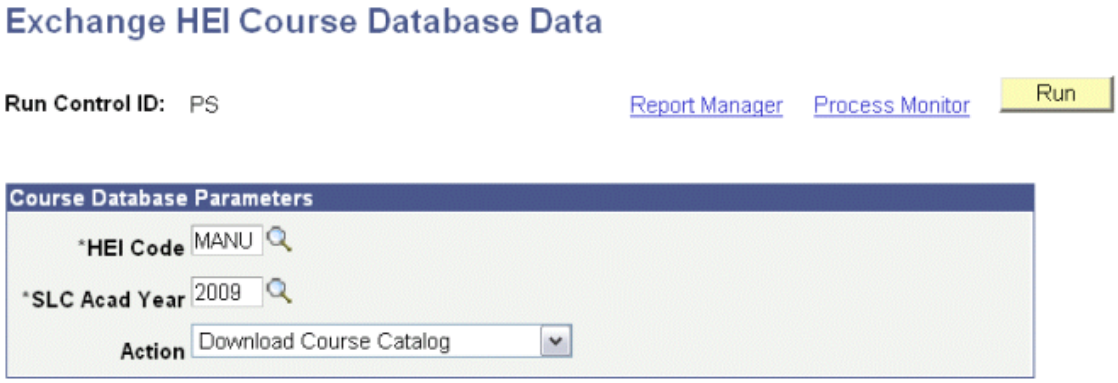
Page Used to Exchange HEI Course Database Data

Page Name	Definition Name	Navigation	Usage
Exchange HEI Course Database Data	SFA_SLC_RC_CD	**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Exchange HEI Course DB Data**, and then **Exchange HEI Course Database Data**	Exchange HEI Course Database data.

Exchanging HEI Course Database Data

Access the Exchange HEI Course Database Data page (**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Exchange HEI Course DB Data**, and then **Exchange HEI Course Database Data**).

This example illustrates the fields and controls on the Exchange HEI Course Database Data page. You can find definitions for the fields and controls later on this page.



Course Database Parameters

Field or Control	Description
HEI Code (higher education institution code)	Select a value in this mandatory field. The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.
SLC Acad Year (Student Loans Company academic year)	Select a value in this mandatory field. The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.

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Field or Control	Description
Action	Select a web service action from the following: • *Download Course Catalog:* Select to use the web service to retrieve HEI Course Database data for the designated HEI code and SLC academic year and store the data in system tables. You can then update data in the Maintain HEI Institution Data (SFA_SLC_CD_INST), Maintain HEI Location Data (SFA_SLC_CD_LOC), and Maintain HEI Course Data (SFA_SLC_CD_CRSE) components. Selecting this action retrieves Qualification values (the *Fetch Qualifications* action) as well as downloading course catalog data. **Note:** *Download Course Catalog* should be the first action taken in the HEI Course Database process. • *Fetch Qualifications:* Select to use the web service to retrieve only the valid values that can be used to update the **Qualifications** field on the Maintain HEI Courses page. Select this action if the Qualifications list of values needs to be updated after the initial Download Course Catalog completes. • *Submit Data Changes:* Select to use the web service to send updates for any changed Location, Institution, Year, or Course data.

Maintaining HEI Data

This section provides an overview of HEI data and discusses how to:

- View and update HEI institution data.
- View and update HEI location data.
- View and update HEI course data.

Understanding HEI Data

Use the Maintain HEI Institution Data, Maintain HEI Locations, and Maintain HEI Courses components to:

- Retrieve HEI Course Database data from the SLC using the web service.
- Maintain HEI Course Database data.
- Send HEI Course Database data updates to the SLC.

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Common Elements Used in this Section

Field or Control	Description
Get SLC Data	Click this button to retrieve the latest information from the SLC.
Send to SLC	To send updated data to the SLC, add a row, update the relevant editable fields, and click the **Send to SLC** button. When the SLC receives updated information, it sends a result number and result message.
Result Number	Displays the result code number that the SLC sends to the HEI when it receives updated information from the HEI.
Result Message	Displays an explanation of the result reply from the SLC.

Pages Used to View and Update HEI Data

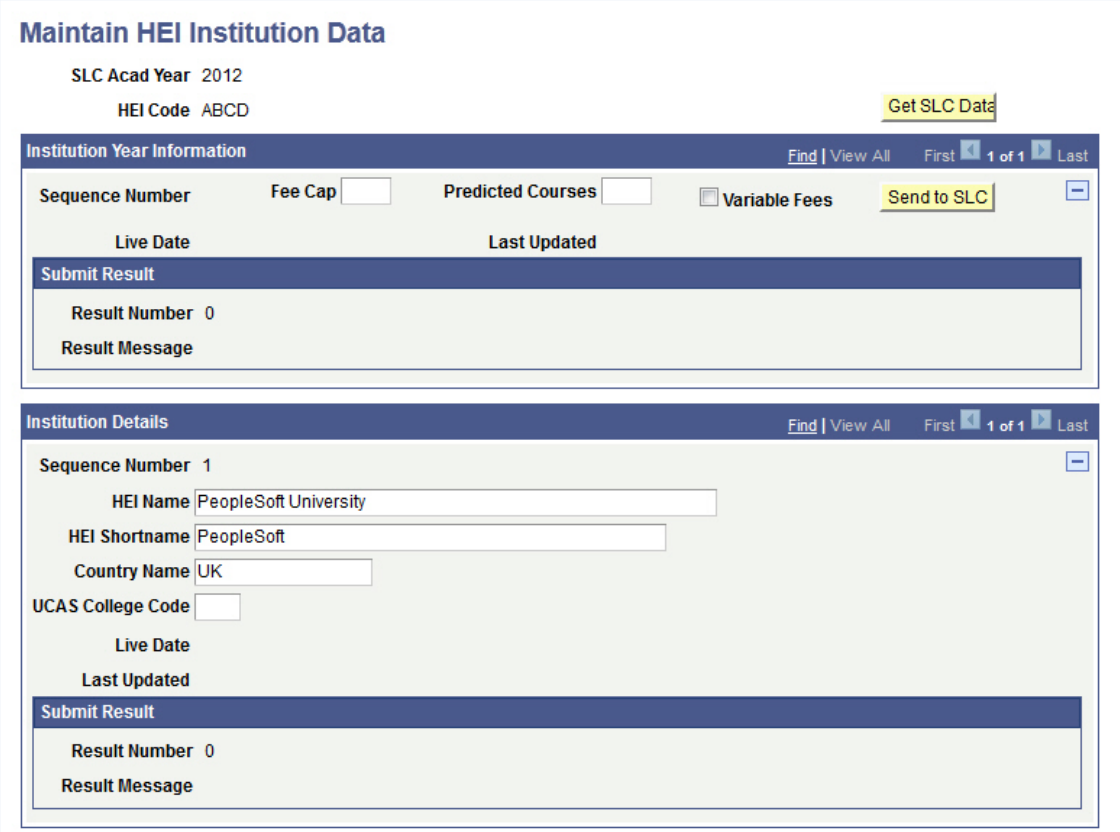
Page Name	Definition Name	Navigation	Usage
Maintain HEI Institution Data	SFA_SLC_CD_INST	**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Maintain HEI Institution Data**, and then **Maintain HEI Institution Data**	View and update HEI institution data.
Maintain HEI Locations	SFA_SLC_CD_LOC	**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Maintain HEI Locations**, and then **Maintain HEI Locations**	View and update HEI location data.
Maintain HEI Courses	SFA_SLC_CD_CRSE	**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Maintain HEI Courses**, and then **Maintain HEI Courses**	View and update HEI course data.

Viewing and Updating HEI Institution Data

Access the Maintain HEI Institution Data page (**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Maintain HEI Institution Data**, and then **Maintain HEI Institution Data**).

This example illustrates the fields and controls on the Maintain HEI Institution Data page. You can find definitions for the fields and controls later on this page.

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Institution Year Information

Field or Control	Description
Fee Cap	Enter the Office for Fair Access cap for fees.
Predicted Courses	Enter the predicted number of courses offered by the institution.
Variable Fees	Select to indicate that the institution offers variable fees.
Last Updated	Displays the date and time that this record was last updated.

Institution Details

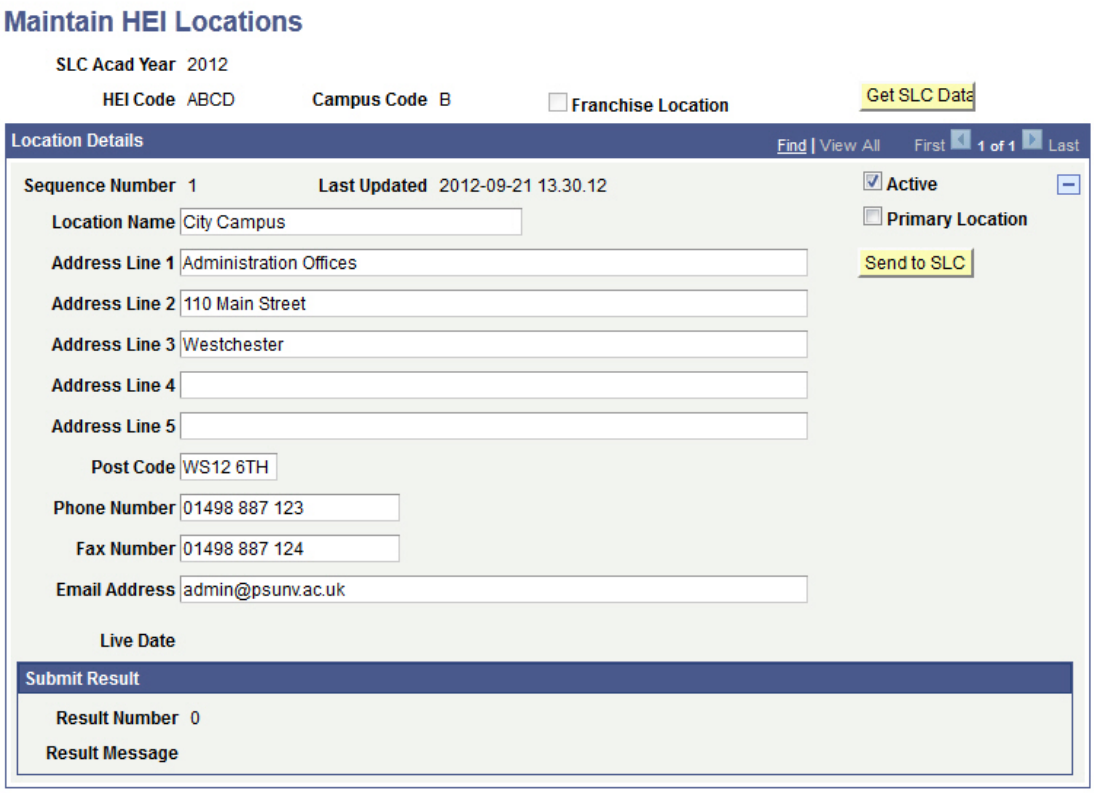
Field or Control	Description
HEI Name, Country Code, and **UCAS College Code**	Enter the institution name, country code, and UCAS college code.
Live Date	Displays the date that the Course became available for selection in the live portal.

Viewing and Updating HEI Location Data

Access the Maintain HEI Locations page (**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Maintain HEI Locations**, and then **Maintain HEI Locations**).

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This example illustrates the fields and controls on the Maintain HEI Locations page. You can find definitions for the fields and controls later on this page.



Location Details

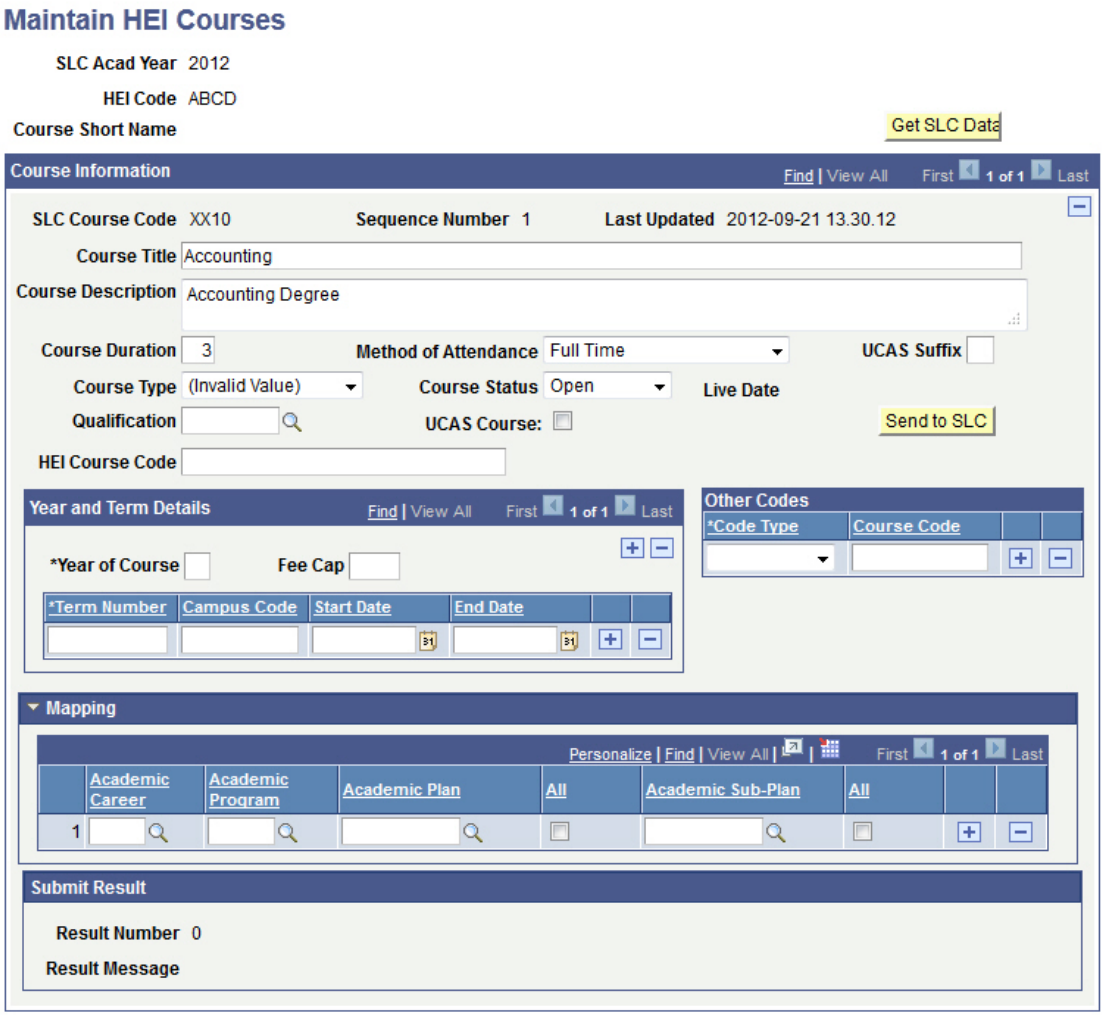
Field or Control	Description
Active	Select to indicate that the location is active.
Primary Location	Select to indicate that the location is a primary location for the institution.

Viewing and Updating HEI Course Data

Access the Maintain HEI Courses page (**Financial Aid**, and then **Student Loans Company**, and then **HEI Course Database**, and then **Maintain HEI Courses**, and then **Maintain HEI Courses**).

This example illustrates the fields and controls on the Maintain HEI Courses page. You can find definitions for the fields and controls later on this page.

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Course Information

Field or Control	Description
SLC Course Code (Student Loans Company course code)	The value in this field is assigned by the SLC. The value is blank when a HEI sends information about a new course to the SLC.
Method of Attendance	Enter a method of attendance. Values are: • *FE (Full Time and Extended Attendance)* • *FP (Full Time and Part Time Attendance)* • *FS (Full Time Plus Sandwich Attendance)* • *FT (Full Time Attendance)* • *OT (Unknown Method of Attendance)* • *PT (Part Time Attendance)*
UCAS Suffix	Displays the campus code/location.

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Field or Control	Description
Course Type	Enter a course type. Values are: • *ACCELERATED (Course compresses a two year course into one year of study)* • *ART TEACHER* • *EMERGENCY* • *FRANCHISED* • *OTHER* • *PART TIME* • *PGCE (Post Graduate Certificate In Education)*
Course Status	Enter a course status. Values are: • *C (Closed)* • *O (Open)*
Qualification	Select from a list of values that appear by default from the SLC web service. The value indicates the type of degree to which the course leads.
UCAS Course	Select this check box if the course is a UCAS course.

Year and Term Details

Field or Control	Description
Fee Cap	Enter the maximum tuition fees to be charged for the designated year of the course.
Term Number	Enter the term number within the year of the course.
Campus Code	Enter the campus code that applies to the term for which you entered a number in the **Term Number** field.
Start Date and **End Date**	Enter the start date and end dates for the term for which you entered a number in the **Term Number** field.

Other Codes

Field or Control	Description
Code Type	Enter a code type. Values are: • *ucas* • *jacs* • *ucasSuffix*

Mapping

Field or Control	Description
Academic Career	Enter the Academic Career to map to the Course.

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43

Processing Return of Title IV Funds

Common Elements Used in Processing Return of Title IV Funds

Field or Control	Description
Date of Withdrawal	Indicates one of the following: the last date of recorded attendance, the date the student began the withdrawal process, the date the student provided your school with the intent to withdraw, or the midpoint of the payment period if the student unofficially withdraws. The system displays the default date based on the date that was established in Campus Solutions Student Records.
Undetermined Withdrawal Date	Select for students who have withdrawn unofficially. The system displays the midpoint of the payment period in the **Date of Withdrawal** field if the student unofficially withdraws. Update this field if you want to use a different withdrawal date. For example, you can use the date when the student last attended an academic-related event if this date was verified by your institution.
Institutional Determination Dt (institutional determination date)	Indicates the withdrawal date determined by the financial aid office.
ID	Indicates the unique identification code for the student.
Name	Displays the name of the student.
Days Elapsed	After an institution determines the date of withdrawal, the system displays the number of days passed since the student withdrew.

Managing Data to Calculate Return of Title IV Aid

This section discusses how to manage data to calculate the return of Title IV aid.

Pages Used to Manage Data to Calculate Return of Title IV Aid

Page Name	Definition Name	Navigation	Usage
Return TIV Session	STDNT_RT_TIV_AID_M	**Financial Aid**, and then **Return to TIV Funds**, and then **Return TIV Session**, and then **Return TIV Session**	Manage return of Title IV aid enrollment session data.

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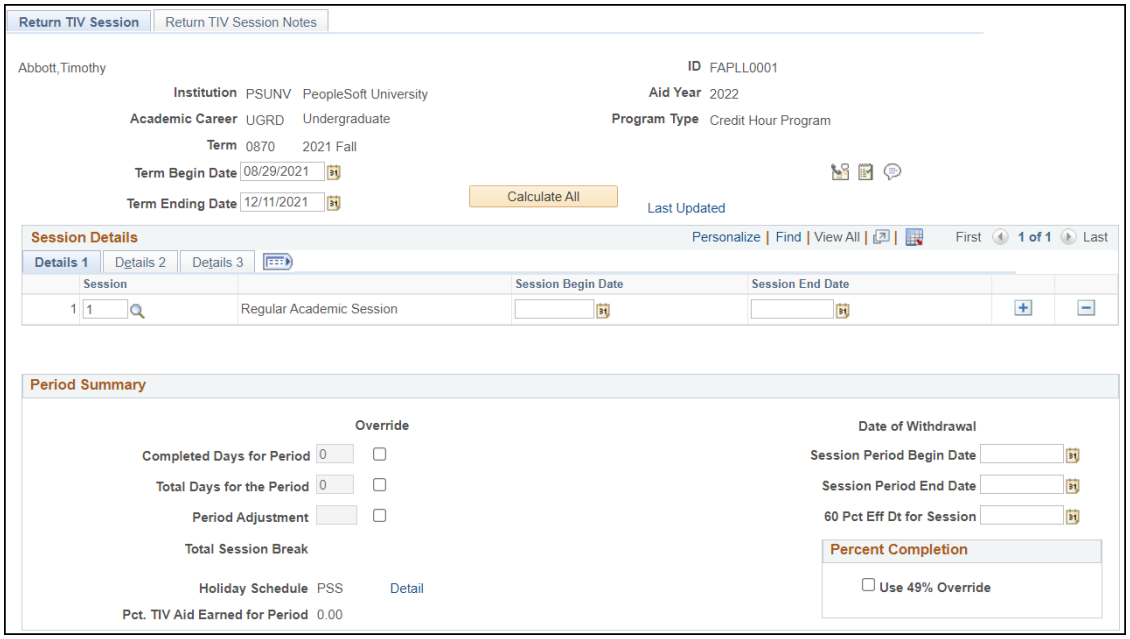
Page Name	Definition Name	Navigation	Usage
Return TIV Session Notes	SFA_RTN_SES_NOTES	**Financial Aid**, and then **Return to TIV Funds**, and then **Return TIV Session**, and then **Return TIV Session**, and then **Return TIV Session Notes**	Use this page to add notes about the student's withdrawal.
Return TIV Aid	STDNT_RTRN_TIV_AID	**Financial Aid**, and then **Return to TIV Funds**, and then **Create Worksheet**, and then **Return TIV Aid Funds Worksheet**, and then **Return TIV Aid**	Manage the return of Title IV aid. Add a student who has withdrawn, calculate the withdrawal percentage, view various dates from different sources, view the payment or enrollment period, or view term information.
Packaging Status Summary	STDNT_AID_PACKAGE	Click the **Student Status** link on the Return TIV Aid page.	Review the student's need, budget, and award or to change the student's packaging status.
FA Term	STDNT_FA_TERM	Click the **FA Term** link on the Return TIV Aid page.	View a student's term information, add a new term for a student, or build the student's financial aid term.
Last Updated	STDNT_RTRN_TIVSEC5	Click the **Last Updated** link on the Return TIV Aid page.	View the user's ID and the date and time of the last update made to the Return Title IV Aid page.

Managing Return of Title IV Aid Enrollment Session Data

Access the Return TIV Session page (**Financial Aid**, and then **Return to TIV Funds**, and then **Return TIV Session**, and then **Return TIV Session**).

This example illustrates the fields and controls on the Return TIV Session page. You can find definitions for the fields and controls later on this page.

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On the initial add, this page is populated with data from the Term Session table and Student Records. This data can be adjusted for the first and subsequent withdrawals based on student changes and/or your school's business process.

Field or Control	Description
Calculate All	Click to populate the Period Summary information with the student's calculated withdrawal information for days and percent earned.
Last Updated	Click to access the Last Updated page to view the user ID, last update timestamp, and other information for the last update made to the page.

Session Details

Field or Control	Description
Session	Enter the **Session** from the **Term** in context to populate the **Session Begin Date, Session End Date,** and **Holiday Schedule** fields.

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Field or Control	Description
Session Break	Displays number of days in **Session Break**. **Session Breaks** greater than 4 days are deducted from total number of calendar days *and* completed calendar days, if withdrawal occurs after the Break. **Sessions** must be entered in order by start date, then end date. Student enrollment in non-unique Sessions may warrant grouping of Sessions in order to calculate the percent of aid earned. Sessions that overlap display as a negative number of days to show that those days are offset in the calculation. **Note: Completed Days** and **Total Days** are gross days for the Session Period; deductions for Holiday or Session Break are not accounted for in this group box.
Status	Select the status for the Session. • *Cancel* – This status cannot be manually selected but is populated from Term History Session Withdraw. • *Completed* – Student has completed all classes for the **Session.** • *In Progress* – Student is actively attending classes for the **Session.** • *Not Enrolled* – Student not enrolled in any classes for the **Session.** • *Not Started* – Session has not started. • *Rescind* – Student previously qualified for and had a RTIV calculation processed. Due to re-enrollment or proof of intent to enroll in a future session, the withdraw has been rescinded. • *Withdraw* – Populated from Term History Session Withdraw. Can be manually selected.
Completed Days	Displays number of days completed in the Session. **Note: Completed Days** and **Total Days** are gross days; deductions for Holiday or Session Break are not accounted for in this group box.
Total Days	Displays total number of days in the Session. **Note: Completed Days** and **Total Days** are gross days; deductions for Holiday or Session Break are not accounted for in this group box.

Period Summary

Period Summary is populated from calculated Session Detail information. It summarizes the dates, days, and percent earned to be used in Create Worksheet to complete the withdrawal calculation process.

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Field or Control	Description
Completed Days for Period	Displays calculated earned days. **Note:** Holiday and/or Session breaks of 5 days or more are deducted from Completed days based on withdrawal date and passage of break period.
Completed Days for Period Override	Select to override calculated completed days.
Total Days for Period	Displays calculated total days for entire span of sessions as determined by the institution. **Note:** Holiday and/or Session breaks of 5 days or more are deducted from Total Days.
Total Days for Period Override	Select to override calculated total days.
Period Adjustment	Displays the adjustment that is required for scheduled holidays of five consecutive days or more. The system displays 0 if no holidays are scheduled consecutively for 5 or more days.
Total Session Break	Displays the total of all breaks between sessions greater than 4 days.
Period Adjustment Override	Select to override the Period Adjustment.
Holiday Schedule and **Detail**	Displays the name of the **Holiday Schedule**. Click **Detail** link for detailed **Holiday Schedule** information.
Pct. TIV Aid Earned for Period(Percent Title IV aid earned for period)	Displays calculated percent of aid earned.
Date of Withdrawal	Displays highest date of withdrawal from **Session Details.**
Session Period Begin Date	Enter the lowest session begin date based on session rows inserted in **Session Details.**
Session Period End Date	Enter the highest session begin date based on session rows inserted in **Session Details.**
60 Pct Eff Dt for Session (60 percent effective date for session)	Enter the 60 percent date for the Session Period Begin and Session Period End dates.
Use 49% Override	Select this check box to use the 49% Override.

Return TIV Session Notes

Access the Return TIV Session page (**Financial Aid**, and then **Return to TIV Funds**, and then **Return TIV Session**, and then **Return TIV Session**, and then **Return TIV Session Notes tab**).

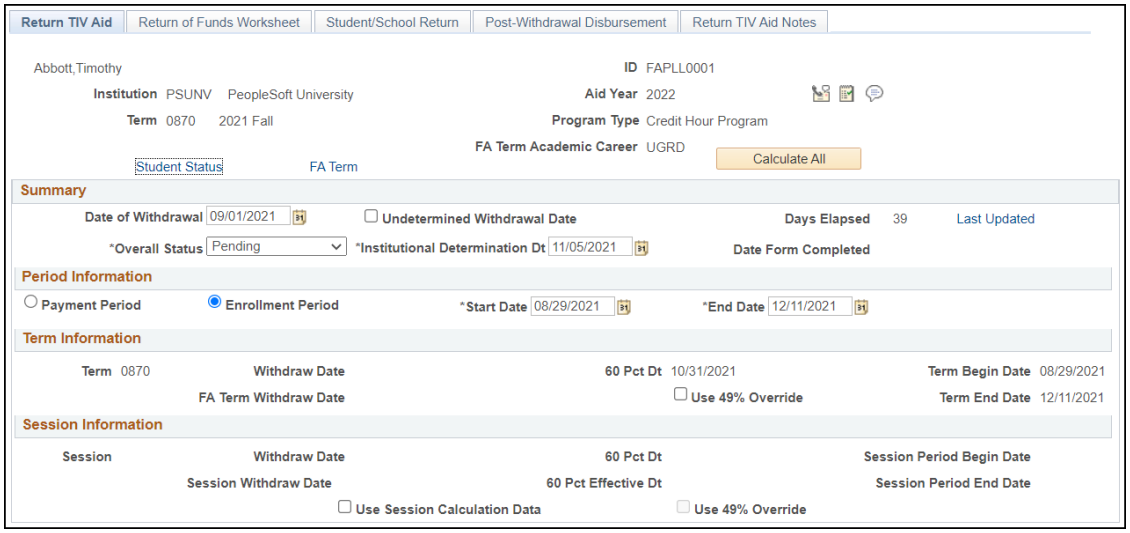
Use this page to add notes about the student's withdrawal.

Managing the Return of Title IV Aid

Access the Return TIV Aid page (**Financial Aid**, and then **Return to TIV Funds**, and then **Create Worksheet**, and then **Return TIV Aid Funds Worksheet**, and then **Return TIV Aid**).

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

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The fields are populated with data generated by the Return to TIV Session component.

Field or Control	Description
Student Status	Click to access the Packaging Status Summary page to review the student's need, budget, and award or to change the student's packaging status.
FA Term	Click to access the Financial Aid Term page to view a student's term information, add a new term for a student, or build the student's financial aid term. If the student withdraws and the withdrawal date defined by Student Records changes, you must rebuild the FA Term.
Calculate All	Click to update and populate the fields with the student's calculated withdrawal information. The system displays the withdrawal status of the student for the specified term or sessions within a term and calculates the actual values for the amount of earned aid, amount of unearned aid, and amount of aid to be returned. When you click this link, the system uses the setup and award data specific to the student. If you change the start and end dates from the Return TIV Aid page or Return TIV Session page, click the **Calculate All** button to update the values on the Return of Funds Worksheet page.

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Summary

Field or Control	Description
Days Elapsed	After an institution determines the date of withdrawal, the system calculates and displays the number of days passed since the student withdrew. The days are calculated using the **Institutional Determination Date** field as a starting date.
Overall Status	Select the student's withdrawal status. The values are: *Pending:* The calculation and the return of Title IV funds are still in progress. The default status is *Pending* until you manually change the status to *Complete*. *Complete:* Indicates that the calculation, the student notification, and the return of Title IV funds has occurred. After you set the status to *Complete*, affected fields and pages become view-only.
Date Form Completed	Displays the date when the **Calculate All** button is clicked on this page to calculate the student's withdrawal percentage. The date is set to the current date by default when you change the overall status to *Complete*. The **Oprid** is also updated when you change the status to *Complete* and save. You can view the **Oprid** updates on the **RTIV Calculation History** page when you click the **Last Updated** link.
FA Term Academic Career	Displays the grouping of all academic work undertaken by a student at an institution. This information is from the Financial Aid Term table.
Last Updated	Click this link to access the RTIV Calculation History page and view the **Oprid,** last update timestamp, and other information for each time the **Overall Status** has been updated to *Complete* and saved on this page. Access the RTIV Calculation History page (**Financial Aid**, and then **Return to TIV Funds**, and then **Create Worksheet**, and then **Return TIV Aid Funds Worksheet**, and then **Return TIV Aid**, and then **click the Last Updated link**).

Period Information

Field or Control	Description
Payment Period	Select to indicate nonstandard periods or terms. A nonstandard period or term is defined as a term that is not a quarter, semester, or trimester. It can be a payment period or a period of enrollment. A payment period can consist of more than one term.

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Field or Control	Description
Enrollment Period	Select to indicate the academic period determined by an institution for which charges are assessed. The enrollment period is the length of the term.
Start Date and **End Date**	Displays the beginning and ending date of the payment or enrollment period. The system uses the start and end date in the actual Return of Title IV Funds calculation for term processing. **Note:** Because you can change the enrollment period start and end dates that are used by the system to calculate the Title IV percentage, you should establish procedures to define how these dates should be changed.

Term Information

Field or Control	Description
Term	Displays the identification number for the term. A term is a period of time designated as an instructional accounting period.
Withdraw Date	Displays the date the student withdrew from the term. The value is from the Student Records Student Career Term table.
FA Term Withdraw Date	Displays the date the student withdrew from the term. The Financial Aid Term table provides the FA term withdrawal date. Student Records determines the date.
60 Pct Dt (60 percent date)	Displays the default value from the Term Session table. This is the date when a student would have completed 60% of the credit/clock hour of the program for the term.
Use 49% Override	Select this check box to use the 49% Override.
Term Begin Date	Displays the beginning date of the term.
Term End Date	Displays the ending date of the term.

Session Information

Field or Control	Description
Session	Displays the session from which the student has withdrawn.
Withdraw Date	Displays the date the student withdrew from the Session Period. The value is from the Student Records Student Career Term table.
Session Withdraw Date	Displays the date the student withdrew from the Session Period from the Return TIV Session Table.
60 Pct Dt (60 percent date)	Displays the default value from the Term Session table. This is the date when a student would have completed 60% of a single session.

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Field or Control	Description
60 Pct Effective Dt (60 percent effective date)	Displays the 60 percent date for the Session Period Begin and Session Period End dates.
Session Period Begin Date	Displays the lowest beginning date of the Session Period as entered in the Return TIV Session table.
Session Period End Date	Displays the highest ending date of the Session Period as entered in the Return TIV Session table.
Multiple Session Details	Click this link to access the Return TIV Session component. This link displays only for Session records and is not displayed for regular Term withdraws.
Use Session Calculation Data	Select to use session information for calculating a session withdraw. Not selecting results in a term withdraw calculation.
Use 49% Override	Displays whether or not the 49% Override is used in the Return TIV Session calculation.

Related Topics

- Reviewing Student Packaging Status by Date
  The student's financial aid award package as well as the information used to award a student can change over time. The As Of Status component enables you to view information about a student's ISIR information and award package by a particular date in time. As new ISIR data is loaded, a student's award package may change. Use the pages in the As Of Status component to review changes over time. This can be particularly important for explaining a reduced award to a student or for reviewing changes to student's awards.
- Viewing Withdrawal Information
  Access the Withdrawal Info page (**Financial Aid**, and then **Financial Aid Term**, and then **Maintain Student FA Term**, and then **Withdrawal Information**, and then **Withdrawal Info**).

Using the Return of Funds Worksheet

This section discusses how to:

- Generate a valid calculation.
- Recalculate TIV aid information.
- Recalculate percentage of TIV aid earned using credit hours.
- View institutional and budget charges.
- Calculate return amounts.
- Review loan debts for withdrawn students.

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Pages Used to Generate a Valid Calculation

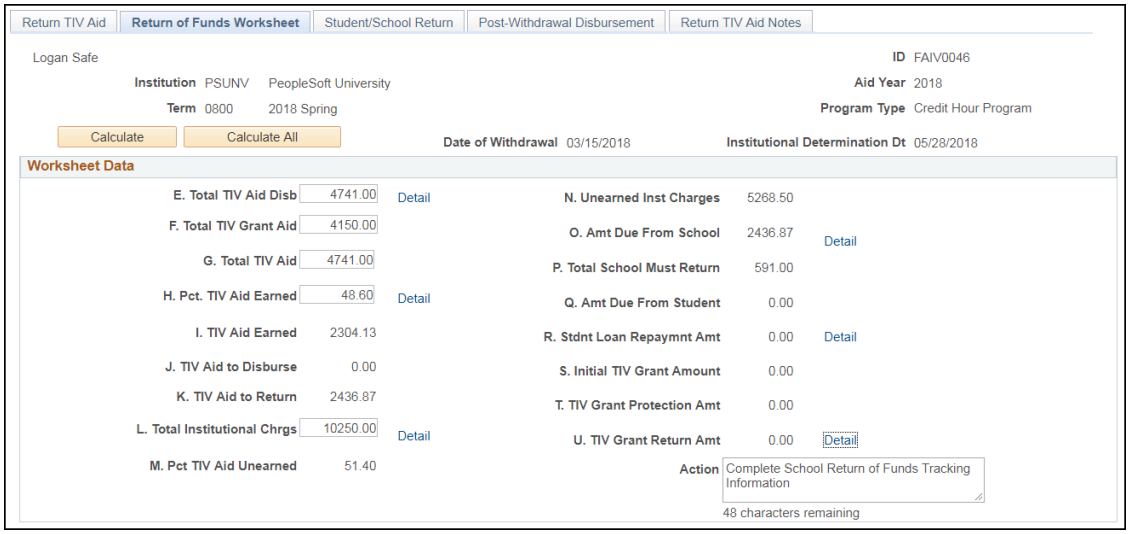
Page Name	Definition Name	Navigation	Usage
Return of Funds Worksheet	STDNT_RTRN_TIV_WK1N	**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Return of Funds Worksheet**	Enter values in the editable fields to generate a valid calculation or to recalculate the totals due by the student and school.
Calculate TIV Aid Information	STDNT_RTRN_TIVSEC1	Click the **Detail** link to the right of the E. Total TIV Aid Disb field on the Return of Funds Worksheet page.	Recalculate or view the E. Total TIV Aid Disb field. The information displayed under Student's TIV Aid Information is from the Student Award Disbursement table and is used to populate the fields under Student's TIV Aid Amounts.
Calculate Pct. TIV Aid Earned	STDNT_RTRN_TIVSEC2	Click the **Detail** link to the right of the H. Pct. TIV Aid Earned field on the Return of Funds Worksheet page.	Recalculate the Percentage of Title IV Aid Earned field and view the Holiday Adjustment field.
Calculate Charge Information	STDNT_RTRN_TIVSEC6	Click the **Detail** link to the right of the L. Total Institutional Chrgs (charges) field on the Return of Funds Worksheet page.	View institutional and budget charges.
Calculate Return Amounts	STDNT_RTRN_TIVSEC4	Click the **Detail** link to the right of P. Total School Must Return field on the Return of Funds Worksheet page.	View amounts to returned by the institution.
Return of Loan Funds	STDNT_RTN_TIVSEC7N	Click the **Detail** link for the **R. Student Loan Repayment Amount** field on the Return of Funds Worksheet.	Enter debt totals for various loan types for withdrawn students to reviewing loan debts.

Generating a Valid Calculation

Access the Return of Funds Worksheet page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Return of Funds Worksheet**).

This example illustrates the fields and controls on the Return of Funds Worksheet page. You can find definitions for the fields and controls later on this page.

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Use the Detail links to view or recalculate specific amounts.

Click **Calculate** to recalculate the values based on the adjustments you made to the percentages.

Click **Calculate All** to update and populate the fields with the student's calculated withdrawal information. The system displays the withdrawal status of the student for the specified term and calculates the actual values for the amount of earned aid, unearned aid, and aid to be returned. The system uses the setup and award data specific to the student.

If you change the start and end dates from the Return of TIV Aid page, click **Calculate All** to update the values on the Return of Funds Worksheet page.

Field or Control	Description
E. Total TIV Aid Disb (E. total Title IV aid disbursed)	Displays Title IV Grant and Loan Programs amounts to be disbursed for grants, amounts that could have been disbursed for grants, net amounts disbursed for loans and net amounts that could have been disbursed for loans. Totals based on the actual federal worksheet are also displayed.
F. Total TIV Grant Aid (F. total Title IV grant aid)	Displays grant aid disbursed and amount that could have been disbursed.
G. Total TIV Aid (G. total Title IV aid)	Displays grant and loan aid disbursed and amount that could have been disbursed.
H. Pct. TIV Aid Earned (H. percent Title IV aid earned)	Displays percentage of period of enrollment completed.
I. TIV Aid Earned (I. Title IV aid earned)	Displays aid earned by the student based on percentage of enrollment period completed.
J. TIV Aid to Disburse (J. Title IV aid to disburse)	Displays amount of aid that could have been disbursed.
K. TIV Aid to Return (K. Title IV aid to return)	Displays amount aid to be returned.

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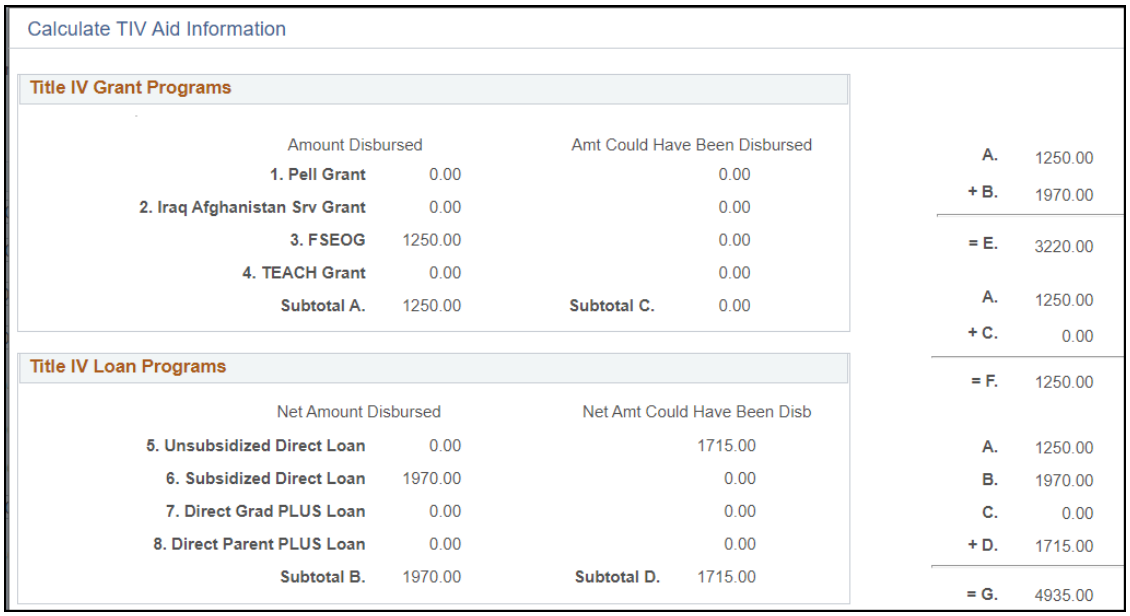
Field or Control	Description
L. Total Institutional Chrgs (L. total institutional charges)	Displays the value of the charges your institution set up in the Institutional Charges setup page. Institutional costs are defined as charges—the cost of attendance—a student must pay to the institution directly. Whether you use the actual or budgeted charges, the system displays the value for the institutional charges you defined in your setup.
M. Pct TIV Aid Unearned (M. percent title IV aid unearned)	Displays the amount to be returned based on the percentage of the unearned aid.
N. Unearned Inst Charges (N. unearned institutional charges)	Displays the amount of aid that must be returned for unearned institutional charges. For example, tuition is an institutional charge. If a student withdraws at 10% of the term, the student earns 10% of the charges for tuition. The remaining 90% is unearned.
O. Amt Due From School (O. amount due from school)	Displays the amount of aid the institution must return to the Title IV program. The institution determines its share of unearned funds first.
P. Total School Must Return:	Displays the total loans the school must return.
Q. Amt Due From Student (Q. amount due from student)	Displays the amount of aid the student must return to the Title IV program. The student returns the difference between the Title IV aid to be returned and the amount of Title IV aid due by the institution. For example, if the returned aid is 1000.00 USD and your institution returns 600.00 USD, the initial unearned calculation for the student to return is 400.00 USD.
R. Stdnt Loan Repaymnt Amt: (R. Student loan repayment amount)	Displays the total amount the student must repay, which consists of loan funds the student has earned, or unearned loan funds that the school is not responsible for repaying, or both.
S. Initial TIV Grant Amount: (S. initial Title IV grant amount)	Displays the Initial amount of Title IV grants the student must return.
T. TIV Grant Protection Amt: (T. Title IV grant protection amount)	Displays the amount of Title IV grant protected using the value in F. Total TIV Grant Aid and applying the 50 percent grant protection.
U. TIV Grant Return Amt: (U. Title IV grant return amount)	Displays the net Title IV grant funds that the student must return.
Action	After you calculate the Return of Title IV Funds, the system displays a note as a reminder to update the tracking fields on the Student/School Return page or the Post-Withdrawal Disbursement page based on what has occurred with the student.

Recalculating TIV Aid Information

Access the Calculate TIV Aid Information page (click the **Detail** link to the right of the E. Total TIV Aid Disb field on the Return of Funds Worksheet page).

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This example illustrates the fields and controls on the Calculate TIV Aid Information page. You can find definitions for the fields and controls later on this page.



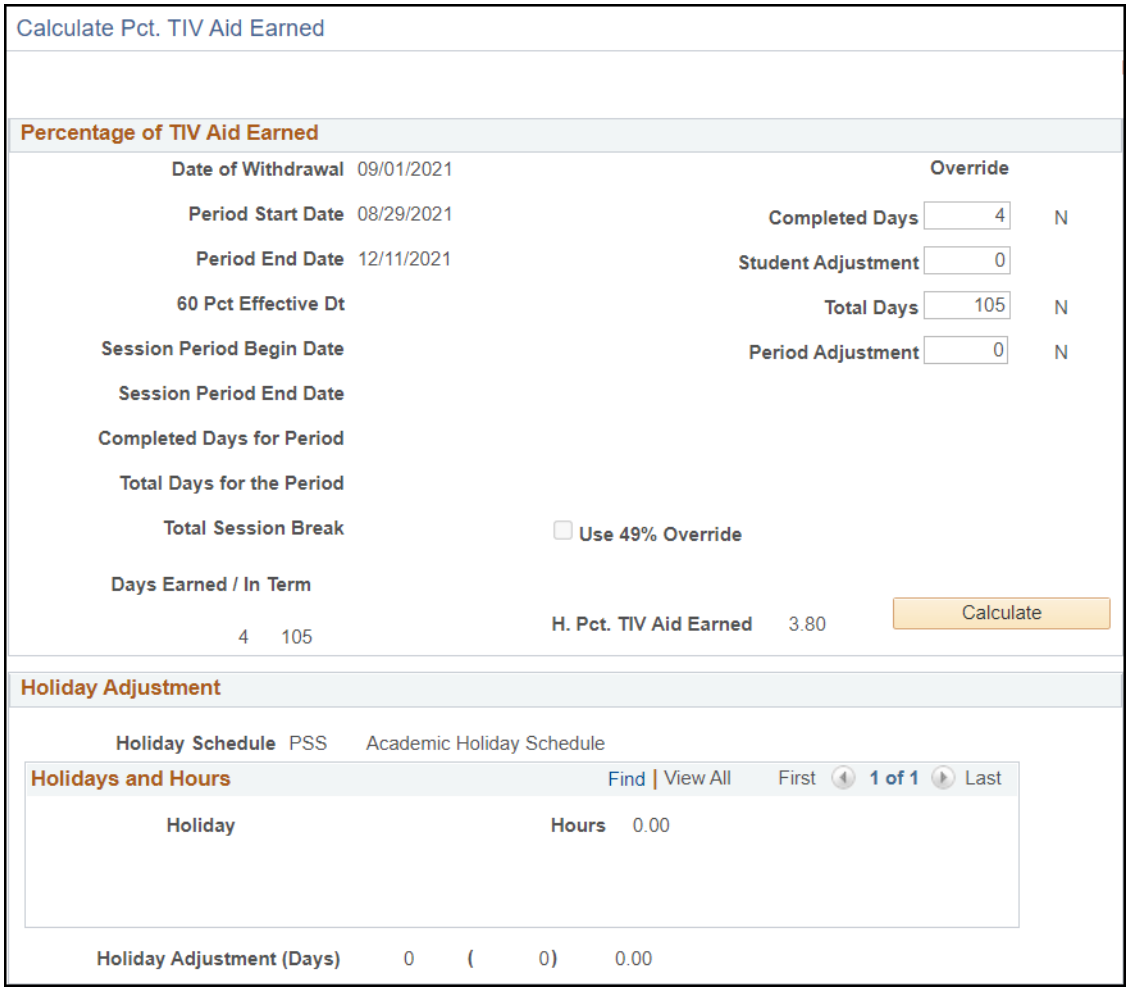
The system displays grant and net loan amounts that are disbursed and that could have been disbursed. Totals based on the actual federal worksheet are also displayed

Recalculating Percentage of TIV Aid Earned Using Credit Hours

Access the Calculate Pct. TIV Aid Earned page (click the **Detail** link to the right of the H. Pct. TIV Aid Earned field on the Return of Funds Worksheet page).

This example illustrates the fields and controls on the Calculate Pct. TIV Aid Earned page. You can find definitions for the fields and controls later on this page.

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Percentage of Title IV Aid Earned

Field or Control	Description
Date of Withdrawal	Displays the student's day of withdrawal as entered on the Return of TIV Aid page.
Period Start Date	Displays the first day of the term or payment period.
Period End Date	Displays the last day of the term or payment period.
60 Pct Effective Date(60 percent effective date)	Displays the 60 percent date for the session in which the withdraw is taking place as recorded in the Term/Session Table or as entered in the Return TIV Session table. **Note:** This date is not necessarily a 60 percent point in time for the span of multiple sessions.
Session Period Begin Date	Displays the lowest beginning date of the Session Period as entered in the as entered in the Return TIV Session table.
Session Period End Date	Displays the highest end date of the Session Period as entered in the Return TIV Session table.

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Field or Control	Description
Completed Days for Period	Displays calculated earned days for a session.
Total Days for Period	Displays calculated total days for a session period.
Total Session Break	Displays the total of all breaks between sessions greater than 4 days.
Completed Days	Displays the number of days between the **Period Start Date** and student's **Date of Withdrawal.** Enter a value in this field to manually override and set the **Override** flag to "Y". **Note: Completed Days** are net days considering eligible **Session Break**s. Holiday Breaks are not reflected in this total. They are, however, accounted for in the **Period Adjustment** to provide a point of reference.
Student Adjustment	Enter a value in this field to exercise professional judgment by adjusting the student's completed days. **Note: Completed Days** are net days considering eligible **Session Break**s. Holiday Breaks are not reflected in this total. They are, however, accounted for in the **Period Adjustment** to provide a point of reference when making an adjustment to a student's **Completed Days**.
Total Days	Displays the number of days between the **Period Start Date** and **Period End Date,** inclusive. Enter a value in this field to manually override and set the **Override** flag to "Y". **Note: Total Days** are net days considering eligible **Session Break**s. Holiday Breaks are not reflected in this total. They are, however, accounted for in the **Period Adjustment** to provide a point of reference.
Period Adjustment	Displays the adjustment that is required for scheduled holidays of five consecutive days or more. The system displays *0* if no holidays are scheduled consecutively for 5 or more days. Enter a value in this field to manually override and set the **Override** flag to "Y". **Note: Total Days** are net days considering eligible **Session Break**s. Holiday Breaks are not reflected in this total. They are, however, accounted for in the **Period Adjustment** to provide a point of reference when making an adjustment to a student's **Total Days**.
Use 49% Override	Displays whether or not the 49% Override is used in the Return TIV calculation. If the **Use 49% Override** is enabled, then the Override fields for **Completed Days**, **Student Adjustment**, **Total Days**, and **Period Adjustment** are read only.

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Field or Control	Description
Days Earned / In Term	Displays the number of completed days divided by the total days after performing a calculation. **Note:** This field is reset to zero every time you access the component. Click **Calculate** to update.
H. Pct TIV Aid Earned (H. percent Title IV aid earned)	Displays the percentage of the period of enrollment or payment period that the student completed.
Calculate	Click to recalculate the percentage of the period of enrollment or payment period that the student completed if updating **Completed Days, Student Adjustment, Total Days,** or **Period Adjustment.**

Holiday Adjustment

Field or Control	Description
Holiday Schedule	Displays the name of the holiday schedule defined on the Holiday Schedule page (**Set Up Common Objects**, and then **Foundation Tables**, and then **Organization**, and then **Holiday Schedule**) for that term. Student Records associates this schedule to terms and sessions used in Campus Solutions. See Campus Community Fundamentals: Setting Up Holiday Schedules.
Holiday	Displays the date of the holiday. The system lists all holidays, not just those that are consecutive.
Hours	Displays the number of clock hours for the holiday.
Holiday Adjustment (Days)	Displays the number of consecutive holidays defined in the holiday schedule.
Calculate	Click to recalculate the adjustment for holidays if you made a change to the start and end dates of the payment or enrollment period. The system determines whether there are any changes to the holiday schedule based on the new start and end dates.

> **Note**
>
> The system does not support clock hours even though you can select clock hours as a program type when you enter the access requirements to enter the Return of TIV Aid page.

Viewing Institutional and Budget Charges

Access the Calculate Charge Information page (click the **Detail** link to the right of the L. Total Institutional Chrgs (charges) field on the Return of Funds Worksheet page).

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Field or Control	Description
Charge Type	Displays institutional charges for the student associated with an item type group for the term.
Category	Displays the budget category for which the charge type is associated.
Academic Career	Displays the grouping of all academic work undertaken by a student at an institution.
Item Code	Displays a budget item within a budget category.
Amount	Displays the charge amount for the charge type.
Override Amount	Enter an amount to override institutional charges when 'Use Actual Charges' is selected in Define Rules for Return.
L. Total Institutional Chrgs (L. total institutional charges)	• Displays actual budgeted charges if *Use Budget Charges* is selected in setup. • Displays actual institutional charges *or* the combined Override amounts of actual institutional charges if'*Use Actual Charges* is selected in setup and Override amounts are used.
Total Institutional Charges	• Displays actual budgeted charges if *Use Budget Charges* is selected in **Define Rules of Return**. • Displays actual institutional charges if *Use Actual Charges* is selected in **Define Rules of Return**.
Calculate	Click to recalculate total institutional charges and to update the Return of Funds Worksheet page.

Related Topics

- Defining Budget Items
  Access the Create Budget Items page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **Budgets**, and then **Budget Items**, and then **Create Budget Items**).

Calculating Return Amounts

Access the Calculate Return Amounts page (click the **Detail** link to the right of O. Amt. Due From School or P. Amount Due From Student fields on the Return of Funds Worksheet page).

Field or Control	Description
School Return of Funds	Displays the amount to be returned by the school by aid fund and amount.
O. By School	Displays total amount from the School Return of Funds group box.
P. School Rtrn (school return)	Displays total loans to be returned by school from the School Return of Funds group box.
Q. By Student	Displays initial grant amount student must return.

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Field or Control	Description
R. Repayment	Displays loan amount student must repay.
Calculate	Click to recalculate the totals if you updated or modified the values.

Reviewing Loan Debts for Withdrawn Students

Access the Return of Loan Funds page (click the **Detail** link for the **R. Stdt Loan Repaymnt Amount** field on the Return of Funds Worksheet).

Enter the totals for any Unsubsidized Direct Loan, Subsidized Direct Loan, Graduate PLUS, or PLUS loans for which the student is responsible.

This worksheet is useful when counseling a withdrawn student on loan indebtedness.

Reviewing Grant Funds for Withdrawn Students

Access the Return of Grant Funds page (click the **Detail** link for the **U. TIV Grant Return Amt** field on the Return of Funds Worksheet).

Displays the amount of grant funds being returned.

Tracking Student and School Return Information

This section discusses how to:

- Track return information.
- Track post-withdrawal disbursement.
- View allocation of post-withdrawal disbursements.
- Review post-withdrawal disbursements.
- Enter return of TIV aid notes.

Pages Used to Track Student and School Return Information

Page Name	Definition Name	Navigation	Usage
Student/School Return	STDNT_RTRN_TIV_WK2N	**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Student/School Return**	Track return information for the student and school.
Post-Withdrawal Disbursement	STDNT_RTRN_TIV_WK3A	**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Post-Withdrawal Disbursement**	Track post-withdrawal disbursements a student was entitled to at the time of withdrawal.

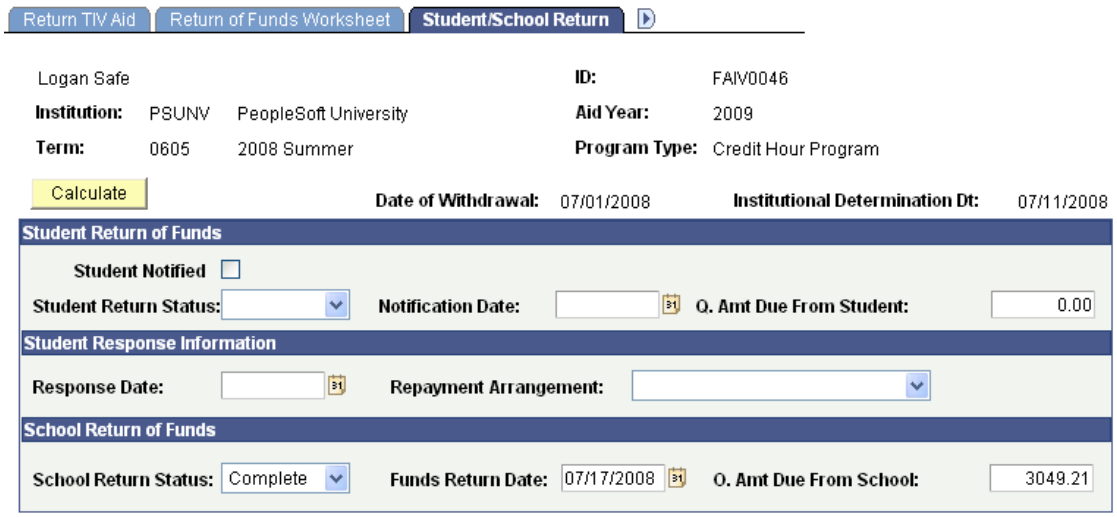
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Page Name	Definition Name	Navigation	Usage
Allocation of PWD	STDNT_PWD_SEC1AN	Click the **Part IV Allocation of PWD** link on the Post-Withdrawal page.	Enter post-withdrawal disbursement amounts for grants and loans.
Post-Withdrawal Disbursements (detail)	STDNT_PWD_SEC1	Click the **PWD Detail** link on the Post-Withdrawal page.	Review post-withdrawal disbursements. Includes the amount of eligible aid not yet disbursed, eligible aid to be disbursed late, and remaining eligible aid to be disbursed.
Return TIV Aid Notes	STDNT_RTRN_TIV_WK4	**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Return TIV Aid Notes**	Enter return of Title IV aid notes. Document information regarding the processing of Title IV Return of Funds.

Tracking Return Information

Access the Student/School Return page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Student/School Return**).

This example illustrates the fields and controls on the Student/School Return page. You can find definitions for the fields and controls later on this page.



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Student Return of Funds

Field or Control	Description
Student Notified	Select this check box to indicate the student has been notified of their Title IV overpayment obligation.
Student Return Status	Displays the student's return of Title IV funds status. *Pending:* Indicates that the calculation and the return of Title IV funds are still in progress. The default status is *Pending* until you manually change the status to *Complete*. *Complete:* Indicates that calculation, student notification, and the return of Title IV funds has occurred. **Note:** You should update the **Student Return Status** field to *Complete* when a student does not need to return funds.
Notification Date	Displays the date the student was notified of Title IV overpayment.
Q. Amt Due From Student(Q. amount due from student)	Displays the amount of Title IV funds the student must return. If a student owes a return, the system populates this value from the Return of Funds Worksheet page.

Student Response Information

Field or Control	Description
Response Date	Displays the date the student responded to the notification from the institution about Title IV overpayment.
Repayment Arrangement	Select from available values to indicate the student's action taken in response to repayment arrangements. Values include: *Arrangement not Complied* *Make Arrangements DOE* *Make Arrangements School* *No Satisfactory Arrangements* *Pay School in Full* *Title IV Loans Only*

School Return of Funds

Field or Control	Description
School Return Status	Indicates the institution's repayment status as pending or complete. The default status is pending until you manually change the status to complete.
Funds Return Date	Indicates the date the funds were returned.

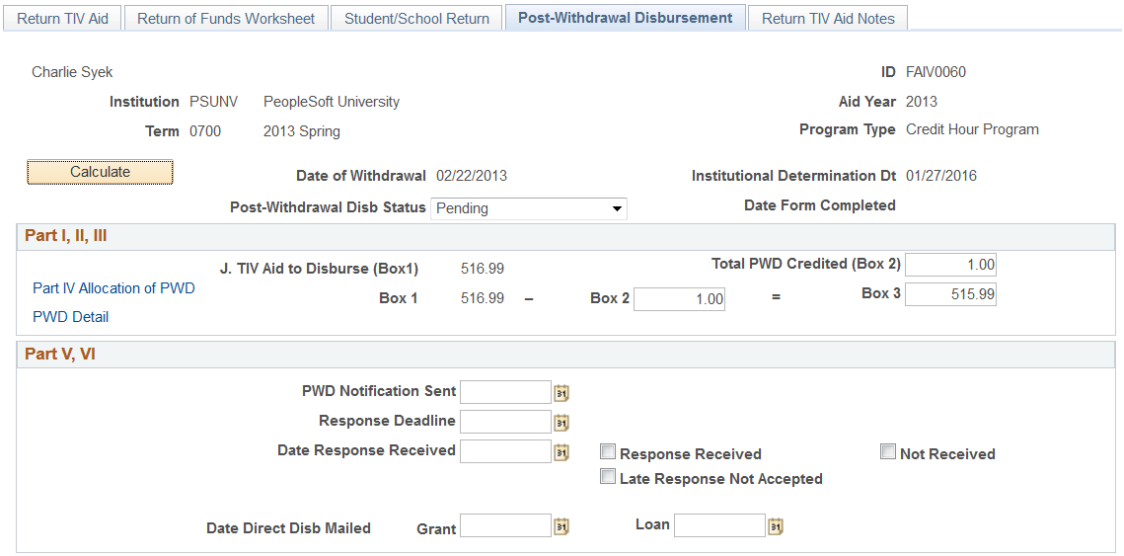
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Field or Control	Description
O. Amt Due From School	Indicates the amount of Title IV funds the institution must return. If the school owes a return, the system automatically populates this value from the Return of Funds Worksheet page.
Calculate	Click to recalculate the amount the school and student have to return if you made a change to the percentage on the Return of Funds Worksheet page.

Tracking Post-Withdrawal Disbursement

Access the Post-Withdrawal Disbursement page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Post-Withdrawal Disbursement**).

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



Field or Control	Description
Calculate	Click to recalculate the amount of aid to a post-withdrawal student if you made a change to the percentage.
Post-Withdrawal Disb Status (post-withdrawal disbursement status)	Indicates whether or not post-withdrawal disbursement calculations are complete or pending. The *Pending* status is set when the worksheet is created. Select *Complete* when appropriate for the current stage of processing.

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Part I, II, III

Field or Control	Description
J. TIV Aid to Disburse (Box 1)	Displays the total amount of post-withdrawal disbursement due. This field is from Step J. Post Withdrawal Disbursement on the Return of Funds Worksheet page.
Total PWD Credited (Box 2)	Enter the total outstanding charges scheduled to be paid from Post Withdrawal Disbursement.
Box 3	The amount to offer directly to the student is derived from the TIV Aid to Disburse amount less the Total PWD Credited amount. Box 3 = Box 1 - Box 2.
Part IV Allocation of PWD (part 4 allocation of post withdrawal disbursement)	Click this link to access the Allocation of Post Withdrawal Disbursement page.
PWD Detail (post withdrawal disbursement detail)	Click this link to view Post Withdrawal Disbursement Allocation details.

Part V, VI

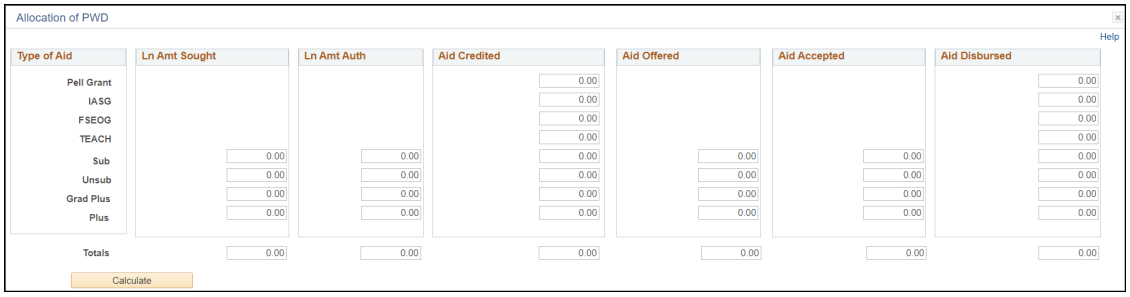
Field or Control	Description
PWD Notification Sent	Select the date that the post-withdrawal disbursement loan notification was sent to the student or parent.
Response Deadline	Select the date by which the student, parent, or both must respond.
Date Response Received	Select the date that the response was received from the student or parent.
Response Received	Select this check box if the response was received from the student or parent.
Not Received	Select this check box if the response was not received from the student or parent.
Late Response Not Accepted	Select this check box if the response was received from the student or parent after the date in the **Response Deadline** field.
Date Direct Disb Mailed (date direct disbursement mailed)	Select the date for grant, loan, or both that the direct disbursement was mailed or transferred.

Viewing Allocation of Post-Withdrawal Disbursements

Access the Allocation of PWD page (click the **Part IV Allocation of PWD** link on the Post-Withdrawal page.)

This example illustrates the fields and controls on the Allocation of PWD page. You can find definitions for the fields and controls later on this page.

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Enter appropriate amounts for each column and type of aid:

Field or Control	Description
Ln Amt Sought (loan amount sought)	Enter the loan amount school seeks to credit to the account.
Ln Amt Auth (loan amount authorized)	Enter the loan amount authorized to credit to the account
Aid Credited	Enter the aid credited to the account.
Aid Offered	Enter an amount of aid offered as direct disbursement.
Aid Accepted	Enter an amount of aid accepted as direct disbursement.
Aid Disbursed	Enter amount of aid disbursed directly to the student
Calculate	Click this button to total the columns.

Reviewing Post-Withdrawal Disbursements

Access the Post-Withdrawal Disbursements detail page (click the **PWD Detail** link on the Post-Withdrawal Disbursements page).

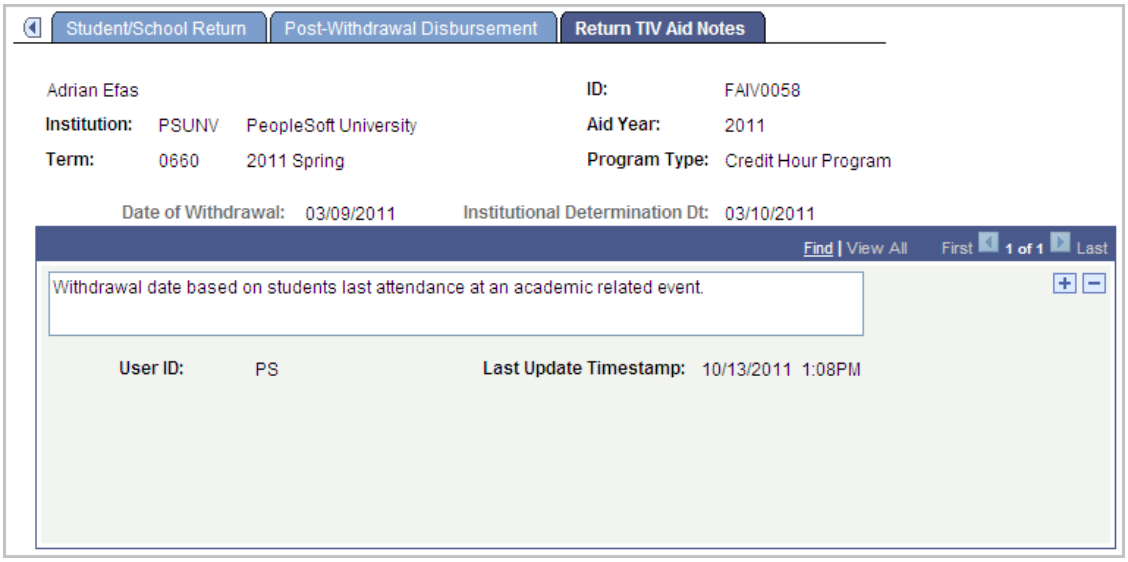
Field or Control	Description
Eligible Aid Not Disbursed	Displays aid not disbursed at time of withdrawal.
Aid To Be Late Disbursed	Displays aid amounts eligible for a post-withdrawal late disbursement.
Remaining To Be Disbursed	Displays aid amounts eligible for a post-withdrawal late disbursement.

Entering Return TIV Aid Notes

Access the Return TIV Aid Notes page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Create Worksheet**, and then **Return TIV Aid Notes**).

This example illustrates the fields and controls on the Return TIV Notes page.

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Enter comments of any length into the text area.

Tracking Return of Title IV Funds

This section discusses how to:

- Track student return of Title IV funds.
- Track school return of Title IV funds.
- Review post-withdrawal disbursement tracking data.

Pages Used to Track Return of TIV Funds

Page Name	Definition Name	Navigation	Usage
Track Student Returns	SFA_TIV_RTN_TRACK	**Financial Aid**, and then **Return of Title IV Funds**, and then **Track TIV Funds Return**, and then **Track Student Returns**	Track student return of Title IV funds. View the status of funds for all students where a calculation exists.
Return of Funds Detail	STDNT_RTOF_SEC1NA	Click the **Detail** link from the Track Student Returns Summary 2 page or Track School Returns Summary page.	View student aid amount and the return of funds for both the student and school.
Track School Returns	SFA_TIV_RTN_TRACK2	**Financial Aid**, and then **Return of Title IV Funds**, and then **Track TIV Funds Return**, and then **Track School Returns**	Track school return of TIV funds. View the status of funds for your institution.

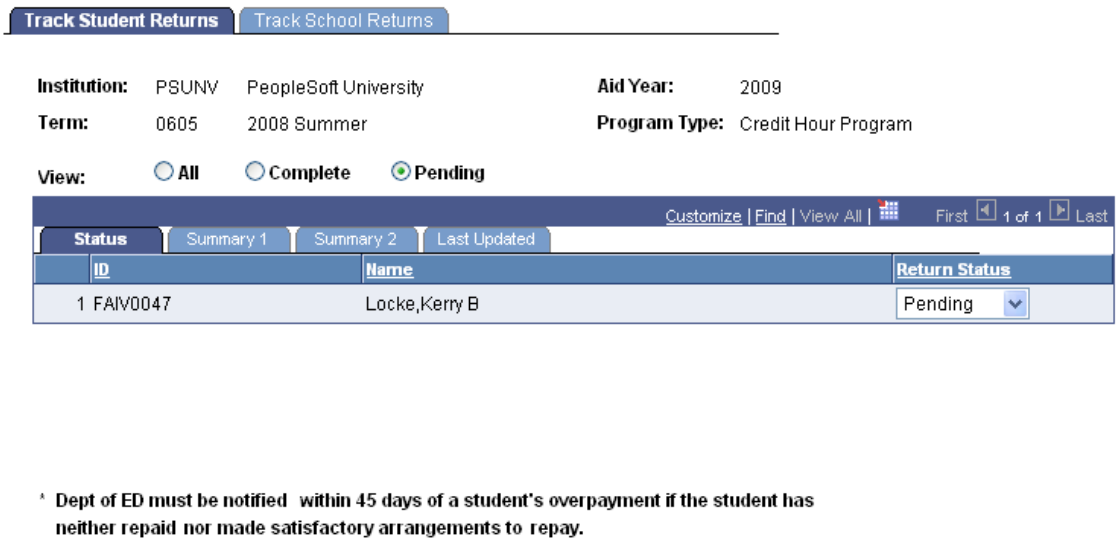
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Page Name	Definition Name	Navigation	Usage
Post Withdrawal Disb Tracking	SFA_TIV_PWD_TRACK	**Financial Aid**, and then **Return of Title IV Funds**, and then **Track PW Disbursement**, and then **Post Withdrawal Disb Tracking**	Review post-withdrawal disbursement tracking data.

Tracking Student Return of Title IV Funds

Access the Track Student Returns page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Track TIV Funds Return**, and then **Track Student Returns**).

This example illustrates the fields and controls on the Track Student Returns page: Status tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
View	Select one of the following: *All:* View students with a status of pending or completed. *Complete:* View students who have completed the Return of Title IV Funds process. *Pending:* View students who are being processed.

Status Tab

Field or Control	Description
ID	Indicates a unique identification code for a student associated with your institution.

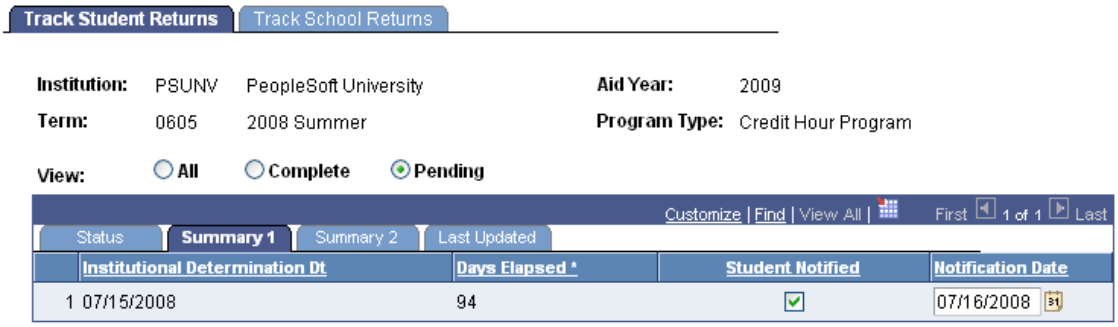
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Field or Control	Description
Name	Displays the name of a student.
Return Status	Displays the student's return of Title IV funds status. This status comes from the Student/ School Return page. If a student does not have a return, the student does not appear in the list. *Pending:* The calculation and the return of Title IV funds are still in progress. This status comes from the Student/School Return page; you can change it manually on this page. *Complete:* The calculation, student notification, and the return of Title IV funds has occurred.

Summary 1 Tab

Select the Summary 1 tab.

This example illustrates the fields and controls on the Track Student Returns page: Summary 1 tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Institutional Determination Dt (institutional determination date)	Displays the withdrawal date determined by the financial aid office.
Days Elapsed	After an institution determines the date of withdrawal, the system calculates and displays the number of days passed since the student withdrew. The days are calculated using the **Institutional Determination Dt** field as the starting date.
Student Notified	If selected, indicates the student has been notified of their Title IV overpayment obligation.

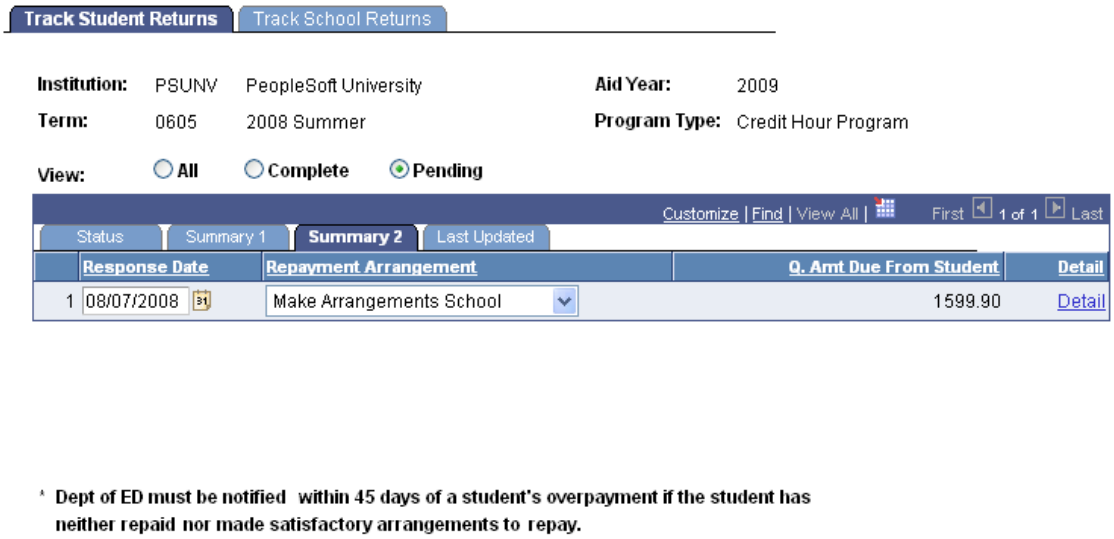
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Field or Control	Description
Notification Date	Displays the date the student was notified of Title IV overpayment.

Summary 2 Tab

Select the Summary 2 tab.

This example illustrates the fields and controls on the Track Student Returns page: Summary 2 tab. You can find definitions for the fields and controls later on this page.



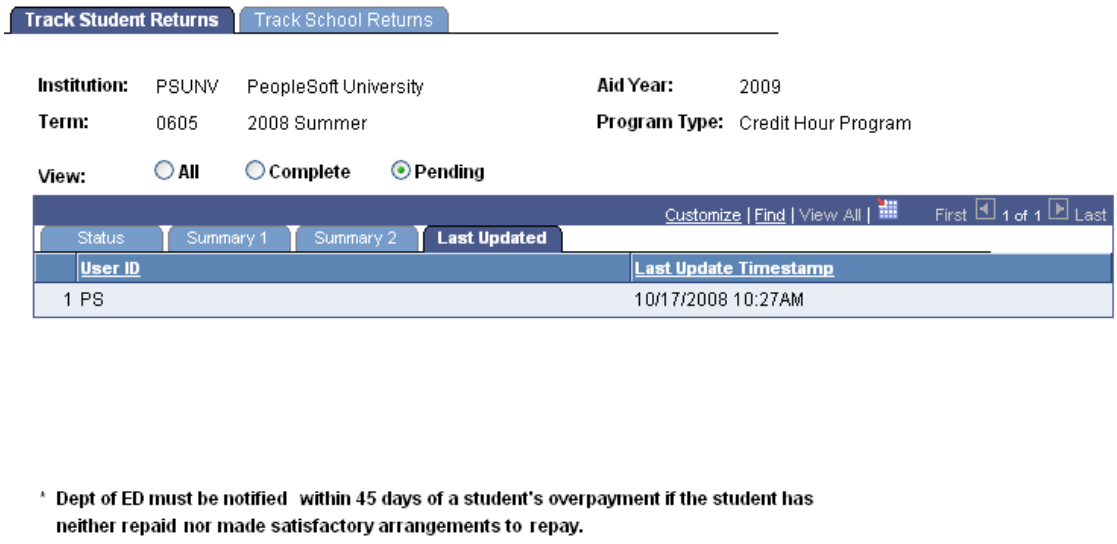
Field or Control	Description
Response Date	Displays the date the student responded to the notification from the institution about Title IV overpayment.
Repayment Arrangement	Displays one of the student response options from the Student/School Return page. The values are: *Arrangement not Complied* *Make Arrangements DOE* *Make Arrangements School* *No Satisfactory Arrangements* *Pay School in Full* *Title IV Loans Only*
Q. Amt Due From Student (Q. amount due from student)	Displays the amount of funds needed to be returned by the student.
Detail	Click to view the Return of Funds Detail page.

Last Updated Tab

Select the Last Updated tab.

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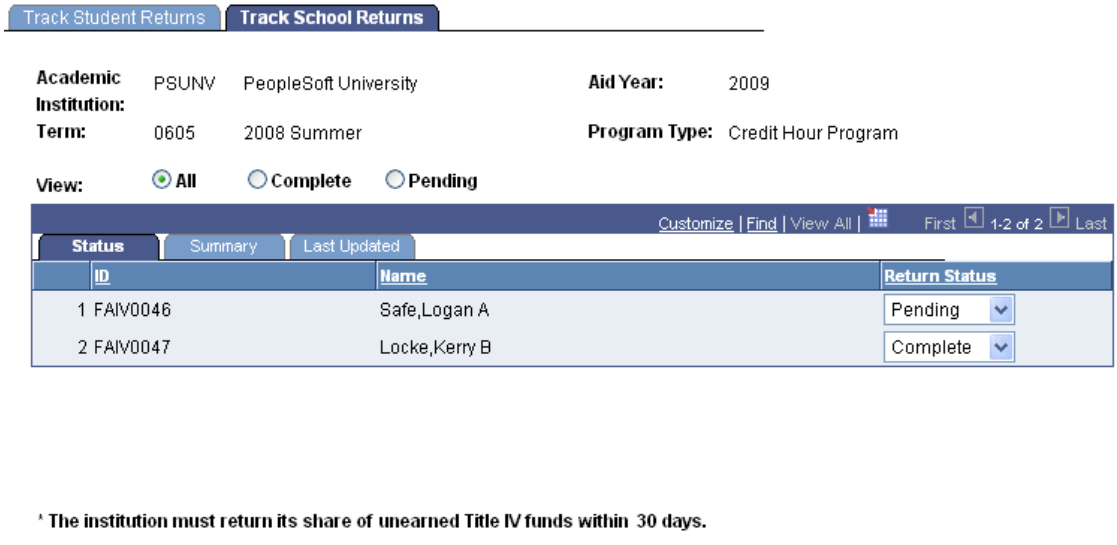
This example illustrates the fields and controls on the Track Student Returns page: Last Updated tab.



Tracking School Return of Title IV Funds

Access the Track School Returns page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Track TIV Funds Return**, and then **Track School Returns**).

This example illustrates the fields and controls on the Track School Returns page: Status tab. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
View	Select one of the following: *All:* View students with a status of pending or completed. *Complete:* View students who have completed the Return of Title IV Funds process. *Pending:* View students who are being processed.

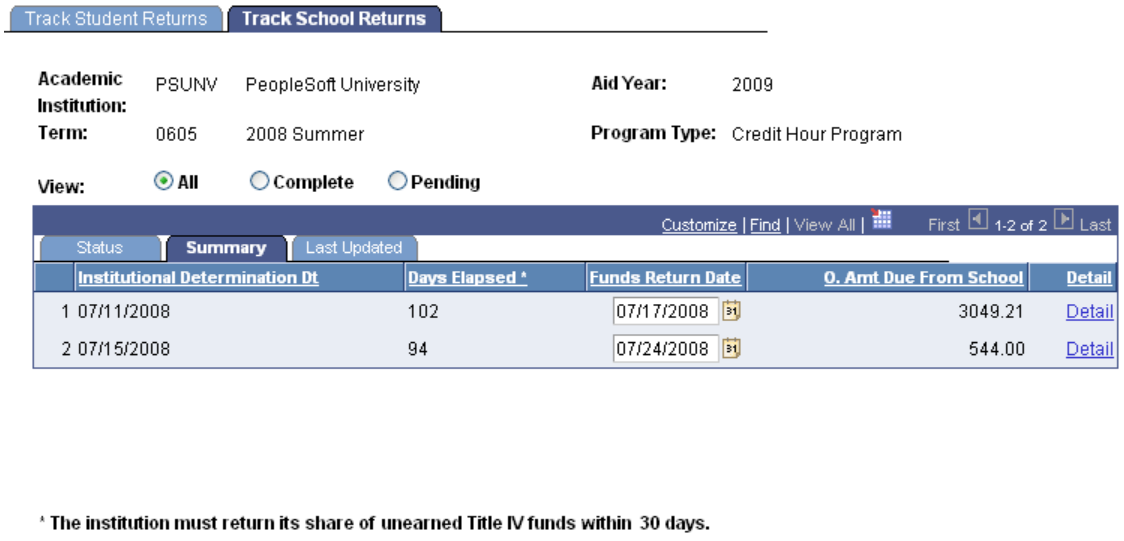
Status Tab

Field or Control	Description
Return Status	Displays the school's return of Title IV funds status. *Pending:* Indicates that the calculation and the return of Title IV funds are still in progress. This status comes from the Student/School Return page; you can change it manually on this page. *Complete:* Indicates that calculation and the school return of Title IV funds has occurred.

Summary Tab

Select the Summary tab.

This example illustrates the fields and controls on the Track School Returns page: Summary tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Institutional Determination Dt (institutional determination date)	Displays the withdrawal date determined by the institution.

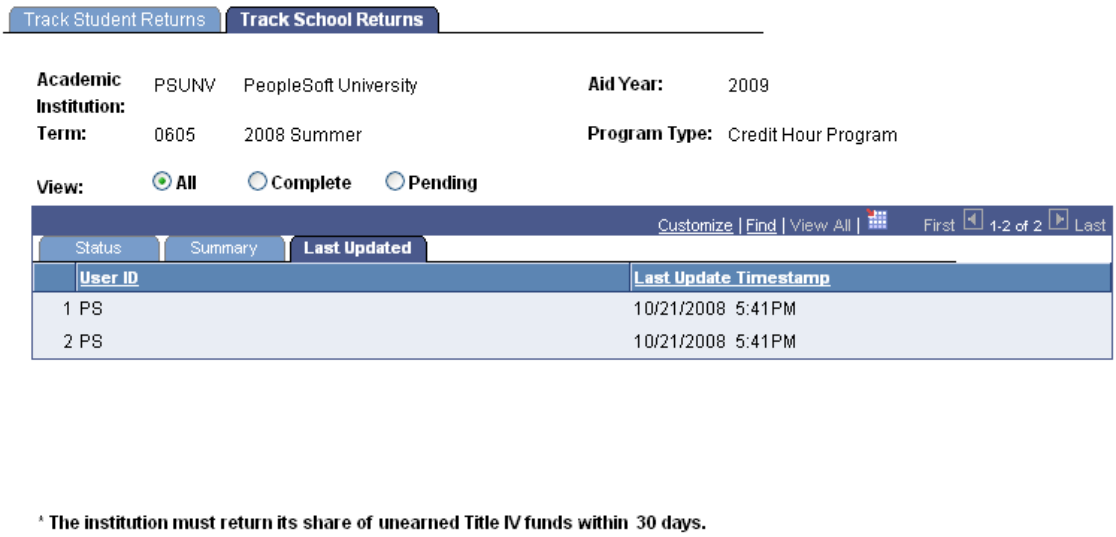
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Field or Control	Description
Funds Return Date	Displays the date the user updated the **Funds Return Date** field on the Student/School Return page.
O. Amt Due From School (O. amount due from school)	Displays the amount of aid the institution must return to the Title IV program.
Detail	Click to view the Return of Funds Detail page.

Last Updated Tab

Select the Last Updated tab.

This example illustrates the fields and controls on the Track School Returns page: Last Updated tab.

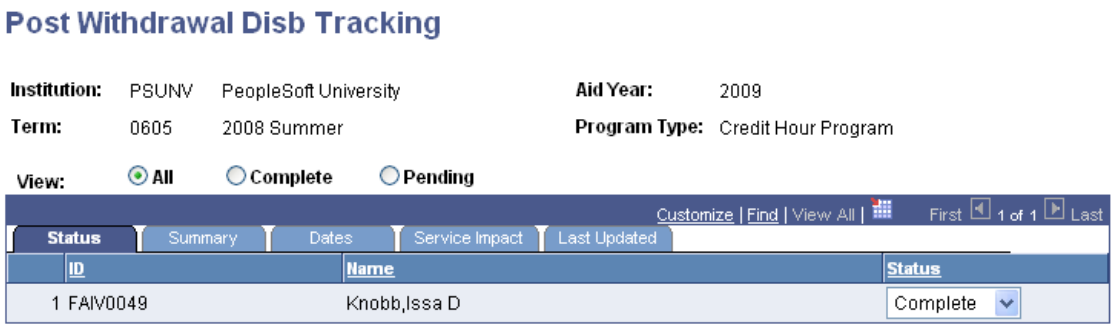


Reviewing Post-Withdrawal Disbursement Tracking Data

Access the Post Withdrawal Disb Tracking page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Track PW Disbursement**, and then **Post Withdrawal Disb Tracking**).

This example illustrates the fields and controls on the Post Withdrawal Disb Tracking page: Status tab. You can find definitions for the fields and controls later on this page.

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Note

The Calculate link is not available when you access the Post-Withdrawal Disbursements page from the Post Withdrawal Disb Tracking page.

Field or Control	Description
View	Select one of the following: *All:* View students with a status of *Pending* or *Completed.* *Complete:* View students who have completed the Return of Title IV Funds process. *Pending:* View students who are being processed.

Status Tab

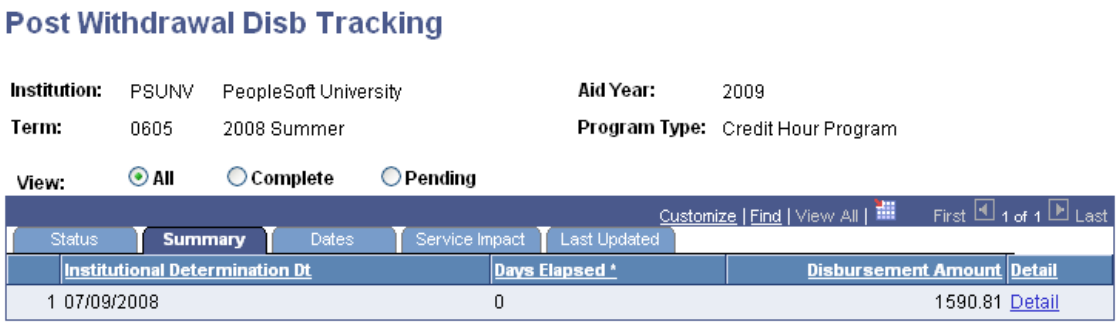
Field or Control	Description
Status	Displays the student's post-withdrawal disbursement status. The system displays a status of *Pending* to indicate that the calculation and the post-withdrawal disbursement are still in progress. A status of *Complete* indicates that calculation, student notification, and the post-withdrawal disbursement has occurred. The status is from the Post-Withdrawal Disbursement page.

Summary Tab

Select the Summary tab.

This example illustrates the fields and controls on the Post Withdrawal Disb Tracking page: Summary tab. You can find definitions for the fields and controls later on this page.

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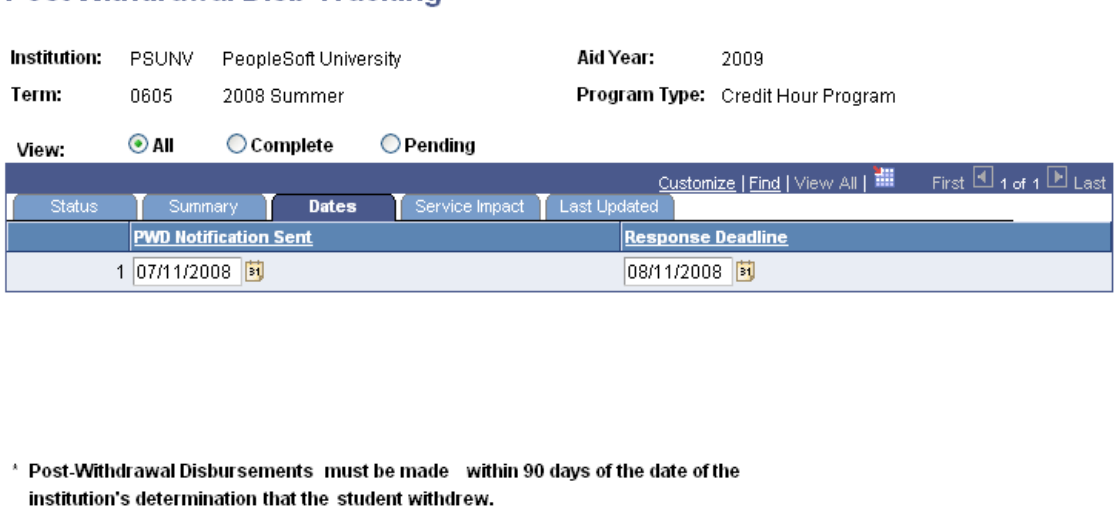


Field or Control	Description
Disbursement Amount	Displays the amount of funds the institution can offer the student as a post-withdrawal disbursement.
Detail	Click to view the Post-Withdrawal Disbursements page.

Dates Tab

Select the Dates tab.

This example illustrates the fields and controls on the Post Withdrawal Disb Tracking page: Dates tab. You can find definitions for the fields and controls later on this page.



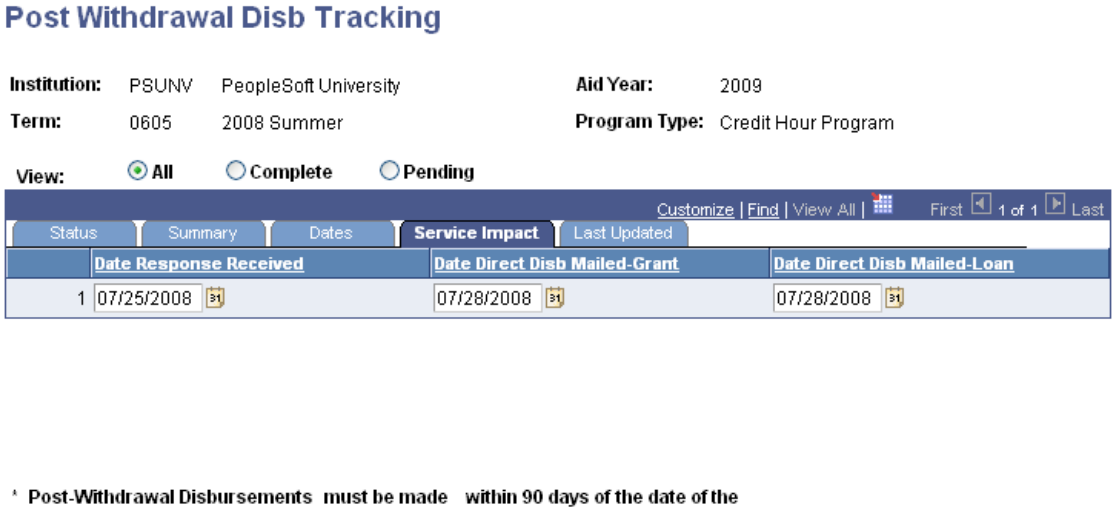
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Field or Control	Description
PWD Notification Sent	View or edit the date that the post-withdrawal disbursement loan notification was sent to the student, parent, or both.
Response Deadline	View or edit the date by which the student, parent, or both must respond.

Service Impact Tab

Select the Service Impact tab.

This example illustrates the fields and controls on the Post Withdrawal Disb Tracking page: Service Impact tab. You can find definitions for the fields and controls later on this page.



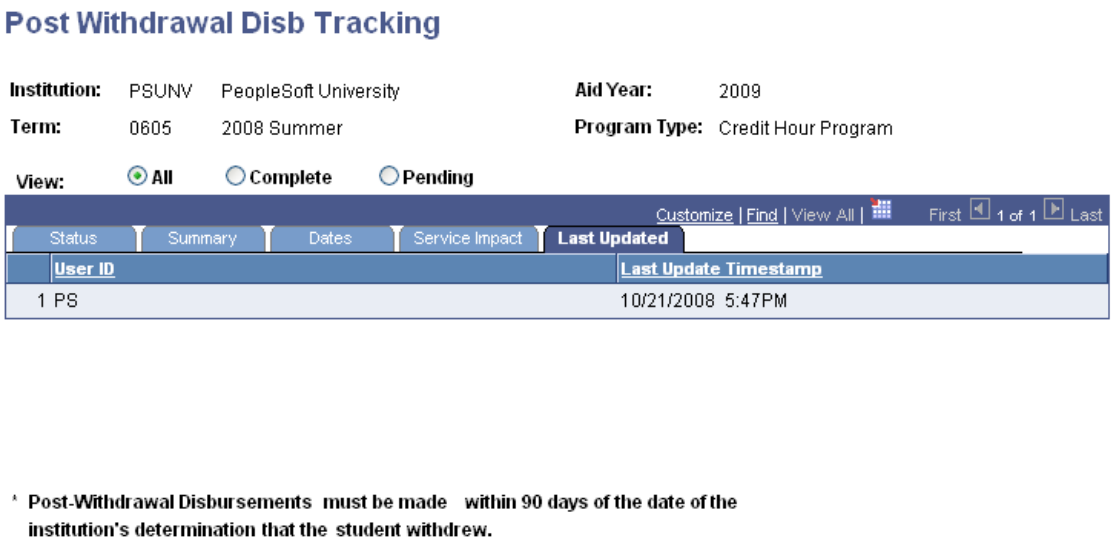
Field or Control	Description
Date Response Received	View or edit the date that the school received the response from the student.
Date Direct Disb Mailed-Grant (date direct disbursement mailed for a grant)	View or edit the date that the direct disbursement was mailed or transferred.
Date Direct Disb Mailed-Loan (date direct disbursement mailed for a loan)	View or edit the date that the direct disbursement was mailed or transferred.

Last Updated Tab

Select the Last Updated tab.

This example illustrates the fields and controls on the Post Withdrawal Disb Tracking: Last Updated tab.

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Reviewing Return of Title IV Funds Student Summary

This section discusses how to review the summary student return of TIV funds.

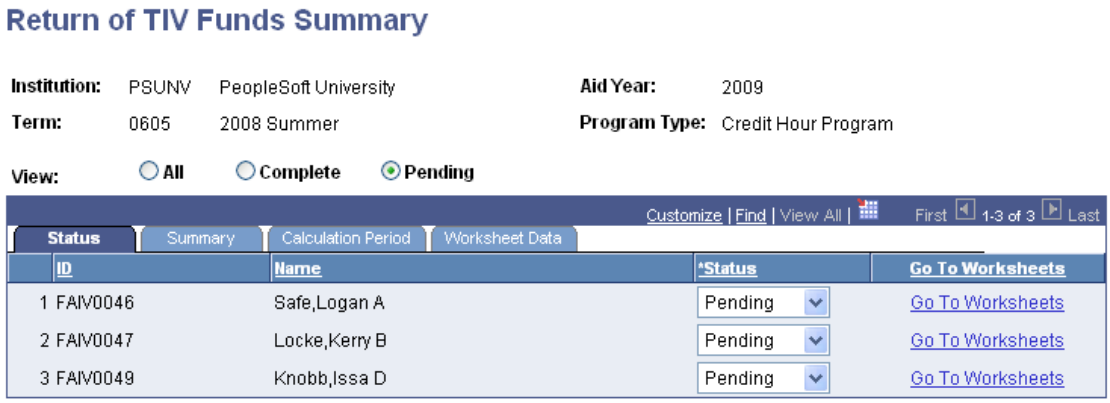
Page Used to Review Return of TIV Funds Student Summary

Page Name	Definition Name	Navigation	Usage
Return of TIV Funds Summary	RTRN_TIV_STU_TRACK	**Financial Aid**, and then **Return of Title IV Funds**, and then **Review Summary of TIV Return**	View summary of the student's return of TIV funds calculation.

Reviewing the Summary of Student Return of TIV Funds

Access the Return of TIV Funds Summary page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Review Summary of TIV Return**).

This example illustrates the fields and controls on the Return of TIV Funds Summary page: Status tab. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
View	Select one of the following: *All:* View students with a status of *Pending* or *Complete.* *Complete:* View students who have completed the Return of Title IV Funds process. *Pending:* View students who are being processed.

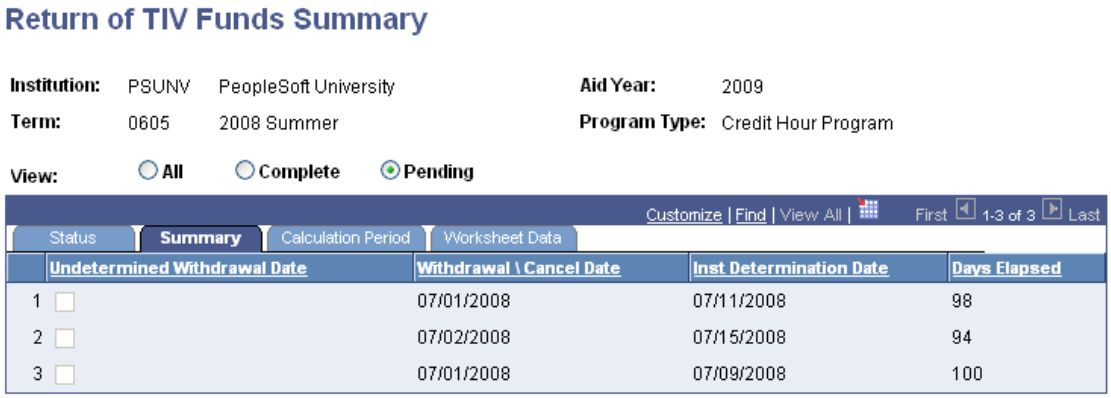
Status Tab

Field or Control	Description
Status	Indicates the student's overall status of the Return of Title IV calculation. *Pending:* The calculation and the return of Title IV funds are still in progress. *Complete:* The calculation, student notification, and the return of Title IV funds has occurred.
Go To Worksheets	Click to access the Return TIV Aid page.

Summary Tab

Select the Summary tab.

This example illustrates the fields and controls on the Return of TIV Funds Summary page: Summary tab. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Undetermined Withdrawal Date	If the student withdrew unofficially, the system displays this check box as selected. This information comes from the Return TIV Aid page. The system displays a date to indicate the midpoint of the payment period if the student unofficially withdraws. You can update this field if you want to use a different withdrawal date. For example, you can use the date the student last attended an academic-related event if this date was verified by your institution.
Withdrawal/Cancel Date	Displays the last date of recorded attendance, the date the student began the withdrawal process, the date the student provided to your school with the intent to withdraw, or the midpoint of the payment period if the student unofficially withdraws. The system displays the default date based on the date that was established in Student Records.

Calculation Period Tab

Select the Calculation Period tab.

This example illustrates the fields and controls on the Return of TIV Funds Summary page: Calculation Period tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Period Used for Calculation	Displays the time period the system uses to define the start and end date of the payment period or enrollment period.
Period Start Date	Displays the first day of the term or payment period. The system uses the payment period or enrollment period start date from the Return of TIV Aid page.

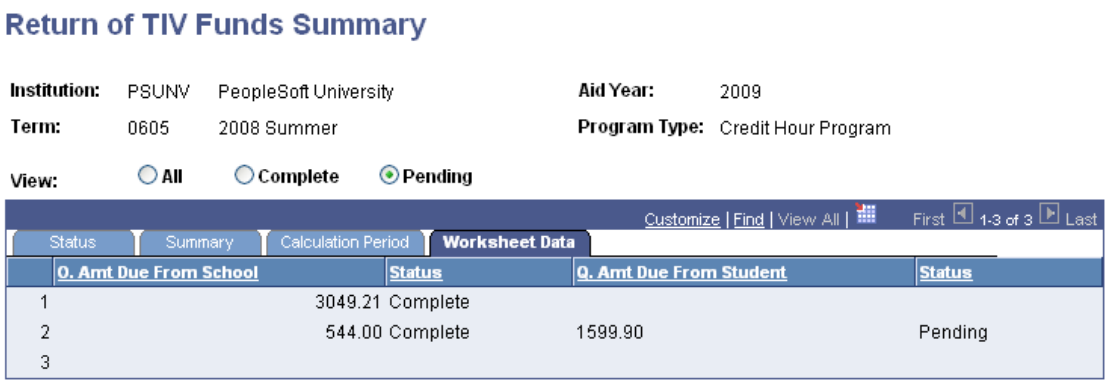
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Field or Control	Description
Period End Date	Displays the last day of the term or payment period. The system uses the payment period or enrollment period end date from the Return of TIV Aid page.
Date Form Completed	Displays the date when you calculated the student's withdrawal percentage and changed the overall status to *Complete* from the Return of TIV Aid page.
J. TIV Aid to Disburse	Displays the amount of aid the student may be eligible for as a post-withdrawal disbursement. If the student received less than his or her eligibility, the system displays the amount to be disbursed.
Status	Displays the status of the post-withdrawal disbursement calculation for Title IV aid to be disbursed as *Pending* or *Complete*.

Worksheet Data Tab

Select the Worksheet Data tab.

This example illustrates the fields and controls on the Return of TIV Funds Summary page: Worksheet Data tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
O. Amt. Due From School (O. amount due from school)	Displays the amount of aid the institution must return to the Title IV programs. The institution allocates its share of unearned funds first.
Status	Displays the school's return status of the calculation for the amount due from the school as *Pending* or *Complete*.
Q. Amt. Due From Student (Q. amount due from student)	Displays the amount of aid the student must return to the Title IV programs.
Status	Displays the student's return status of the calculation for the amount due from the student as *Pending* or *Complete*.

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Generating Return of Title IV Funds Withdrawal Report

This section discusses how to:

- Generate the Return of Title IV Funds Report.
- View career totals.

Pages Used to Generate the Return of Title IV Aid Report

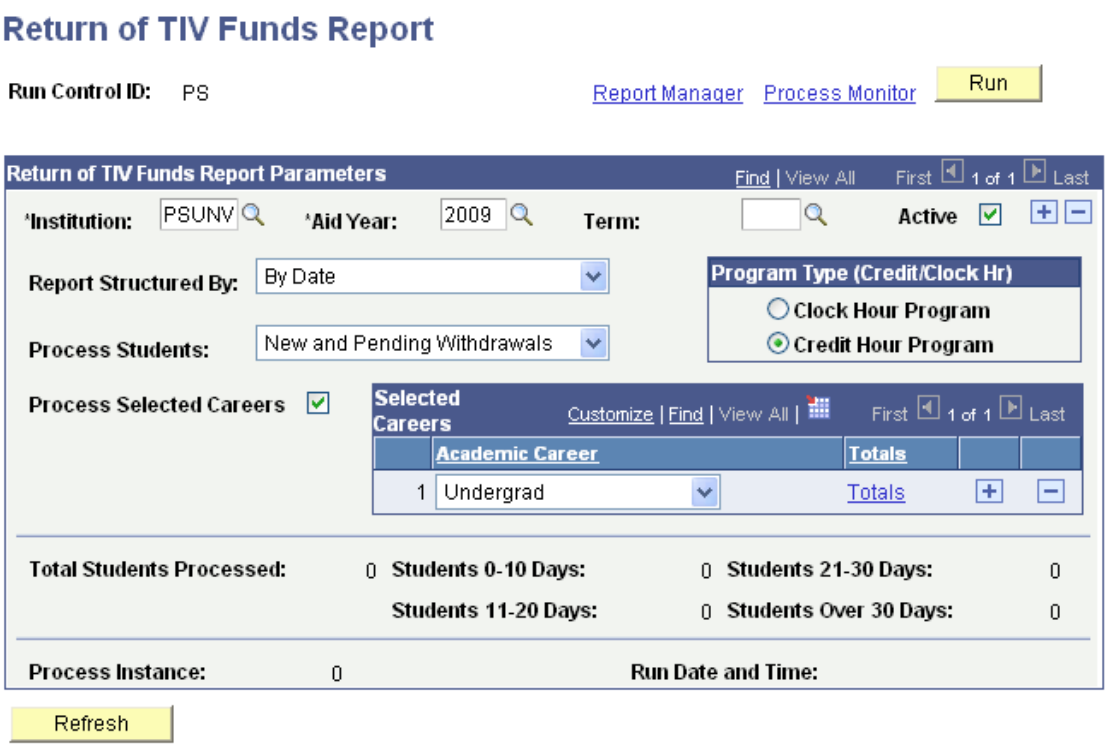
Page Name	Definition Name	Navigation	Usage
Return of TIV Funds Report	RUN_CNTL_FATIVRTN	**Financial Aid**, and then **Return of Title IV Funds**, and then **Return of TIV Aid Report**, and then **Return of TIV Funds Report**	Generate the Return of Title IV Funds Withdrawal report.
Totals for Career	RUN_CNTL_CARTOLS	Click the **Totals** link on the Return of TIV Funds Report page.	View the total number of days passed for each aging agent category and view the total number of students processed.

Generating Return of TIV Funds Report

Access the Return of TIV Funds Report page (**Financial Aid**, and then **Return of Title IV Funds**, and then **Return of TIV Aid Report**, and then **Return of TIV Funds Report**).

This example illustrates the fields and controls on the Return of TIV Funds Report page. You can find definitions for the fields and controls later on this page.

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The report displays the most recent withdrawal dates first and the oldest last. The system displays the information based on how you define your run control options. It includes worksheet calculations, return of funds by the school and student, institutional charges, and number of days since the withdrawal date.

Field or Control	Description
Active	Select to activate the run control for that row.
Report Structured By	Select from the following options how the report was structured: *By Date* *By Name* *By Date Range/Name*
Process Students	Select from the following status options. *Completed Withdrawals:* Select to view students who have completed withdrawal worksheets. *New Withdrawals Only:* Select to view students who have a withdrawal date but no withdrawal worksheet records. *New and Pending Withdrawals:* Select to view students who have a withdrawal date, but the withdrawal process is not complete. *Pending Withdrawals:* Select to view students whose Return of Title IV calculations are not complete.
Process Selected Careers	Select to process the report by specific careers. If this check box is clear, the system processes all careers.

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Field or Control	Description
Clock Hour Program	Select to view records with a program type by clock hours.
Credit Hour Program	Select to view records with a program type by credit hours.
Students 0-10 Days, Students 11-20 Days, Students 21-30 Days, and **Students Over 30 Days**	Used as an aging agent to indicate how many days have passed since the institution determined the date of withdrawal.
Total Students Processed	Displays the total number of students processed for this report.
Process Instance	Displays an increment counting of the last time the process was run.
Run Date and Time	Displays the date and time the process was run.
Refresh	Click to refresh the totals after each time you run the process.
Totals	Click to view the total number records based on career.

Viewing Career Totals

Access the Totals for Career page (click the **Totals** link on the Return of TIV Funds Report page).

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44

Managing Work-Study

Understanding Work-Study

Managing work-study requires a bridge between the institution's payroll department and the financial aid office to provide an overall view of student employment. Students who are classified as *employees* are identified and accessed in the institution's payroll department to track compensated wages. Wages may come from various forms of employment such as academic, staff, or work-study. When each type of compensation is identified, the information is updated and can be viewed within Financial Aid. This allows the institution to report and monitor student earnings to ensure that total earnings do not exceed the work-study award.

Work-study is an important part of a financial aid package for students. The federal work-study program provides jobs for undergraduate and graduate students with financial need, enabling them to earn money to pay educational expenses. Students receive work-study awards from participating institutions after filing a Free Application for Federal Student Aid (FAFSA) to determine their financial need. Students can be employed by the institution; by a federal, state, or local public agency; by private nonprofit organizations; or by private organizations. The program encourages community service work and work related to the student's course of study.

The minimum requirement to access a work-study placement record is an accepted work-study award. The hiring department then records the student's placement on the Work-Study Placement page. After placement, you can review the placement records of students who are active as employees.

> **Note**
>
> If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations.
>
> See:
>
> Campus Solutions Application Fundamentals: Integrating Person Data
>
> Campus Solutions Application Fundamentals: Integrating Setup Data
>
> Campus Solutions Application Fundamentals: Monitoring Integrations Using the Integrity Utility
>
> *Campus Solutions to Human Capital Management Integration* in My Oracle Support (ID 1553319.1).

Managing Work-Study Jobs

This section discusses how to:

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- Assign a work-study job.
- View a student's total award package.
- View earnings summary.
- View general job information, work location, and compensation.
- View salary components.

Pages Used to Manage Work-Study Jobs

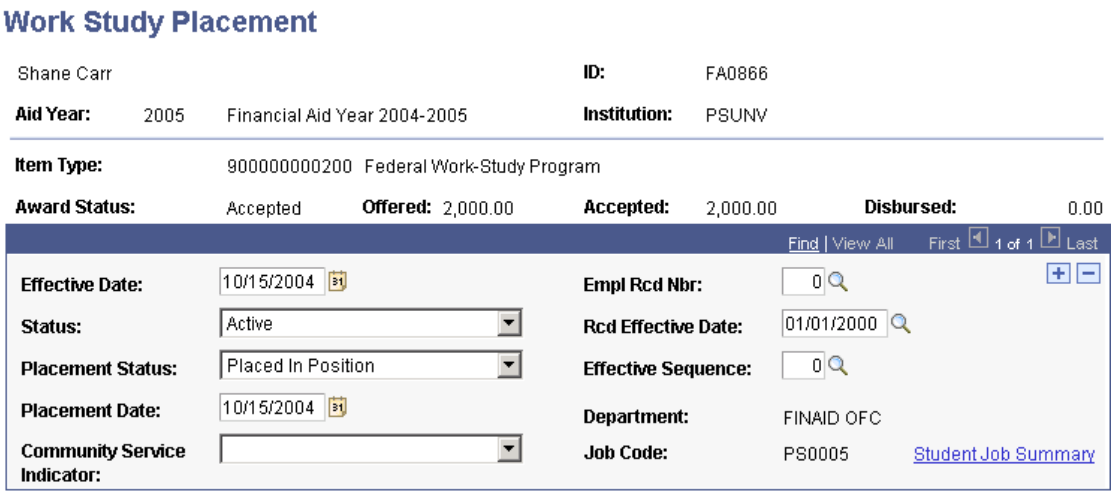
Page Name	Definition Name	Navigation	Usage
Work Study Placement	STDNT_WRKSTUDY_AWD	**Financial Aid**, and then **Awards**, and then **View Work Study Approval**, and then **Work Study Placement**	Assign a work-study job to an approved student and verify that the student has a posted work-study award.
Award Summary	FA_EARNINGS1	**Financial Aid**, and then **Awards**, and then **View Award Earnings Summary**, and then **Award Summary**	View the student's total award package and the status of each award. This page lists each of the student's awards, providing the financial aid item type, career associated with the award, and the offered, accepted, authorized, and disbursed amounts.
Award Detail	AWARD_DETAIL_SEC	Click the **Award Details** link on the Award Summary page.	View offered and accepted amounts, net disbursement balance, and authorized and disbursed amounts.
Earnings Summary	FA_EARNINGS2	**Financial Aid**, and then **Awards**, and then **View Award Earnings Summary**, and then **Earnings Summary**	View a student's campus earnings. Campus earnings information includes hours worked and gross earnings in year-to-date, month-to-date, and quarterly amounts.
Job Information	JOB_SUMMARY	**Financial Aid**, and then **Awards**, and then **View Campus Jobs**, and then **Job Information**	View job information, work location, and compensation.
Salary Components	COMP_JOB_SUMM_SEC	Click the **Components** link on the Job Information page.	View compensation rate and frequency and other payment information.

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Assigning a Work-Study Job

Access the Work Study Placement page (**Financial Aid**, and then **Awards**, and then **View Work Study Approval**, and then **Work Study Placement**).

This example illustrates the fields and controls on the Work Study Placement page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Item Type	Displays the item type number and description for the work-study award.
Award Status	Displays acceptance of work-study award by student.
Offered	Displays the amount of work-study earnings offered to the student.
Accepted	Displays the amount of work-study earnings that the student accepted.
Disbursed	Displays the amount of work-study earned by the student.
Placement Status	Select the value that indicates the current status of the student's job placement. Values are: *Appointment Terminated:* The student is no longer in the work-study job. *Earned Maximum for Award:* The student has earned the annual awarded work-study maximum. *Eligible for Placement:* The student is eligible for placement. *Not Placed in Position:* The student is not placed in a work-study position. *Placed in Position:* The student is placed in a work-study position.

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Field or Control	Description
Placement Date	Enter the date on which the hiring department enters the placement status.
Community Service Indicator	Indicates whether the student's job fulfills the community service requirement for your institution. Values are: *Community Service:* Fulfills a community service requirement. *Not Community Service:* Does not satisfy the community service requirement.

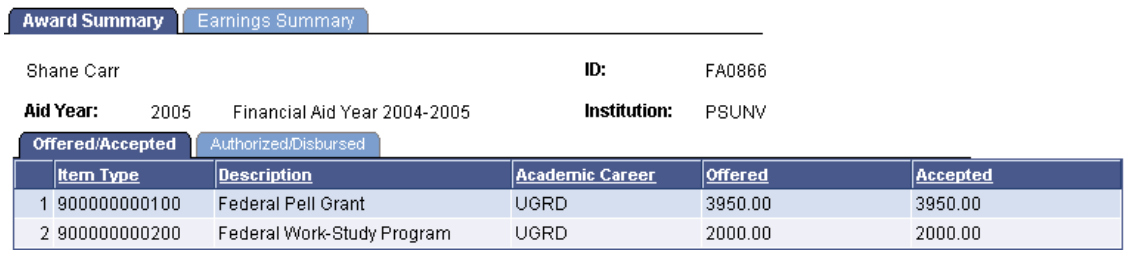
> **Note**
>
> The following fields become available when the student's placement status is *Eligible for Placement, Placed in Position,* or *Appointment Terminated.*

Field or Control	Description
Empl Rcd Nbr (employment record number)	Select the employment record number that corresponds to the assigned job.
Rcd Effective Date (record effective date)	Enter the date when the student's employment record was initialized.
Effective Sequence	Enter the sequence number for the particular employment record number.
Department	Displays the department of the student's job. This value comes from the employment record.
Job Code	Displays the job code for the student's job. This value comes from the employment record.

Viewing a Student's Total Award Package

Access the Award Summary page (**Financial Aid**, and then **Awards**, and then **View Award Earnings Summary**, and then **Award Summary**).

This example illustrates the fields and controls on the Award Summary page: Offered/Accepted tab.

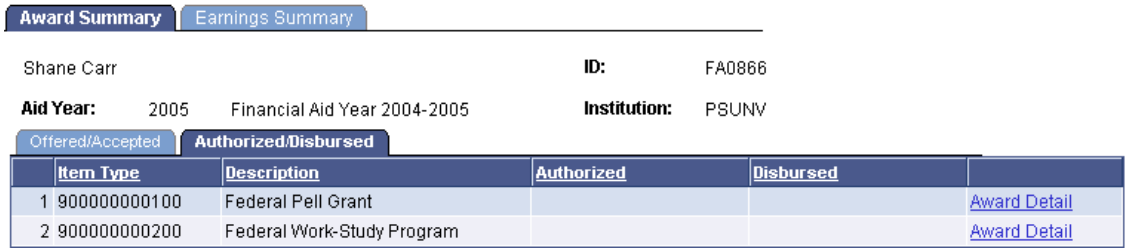


Authorized/Disbursed Tab

Select the Authorized/Disbursed tab.

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This example illustrates the fields and controls on the Award Summary page: Authorized/ Disbursed tab. You can find definitions for the fields and controls later on this page.

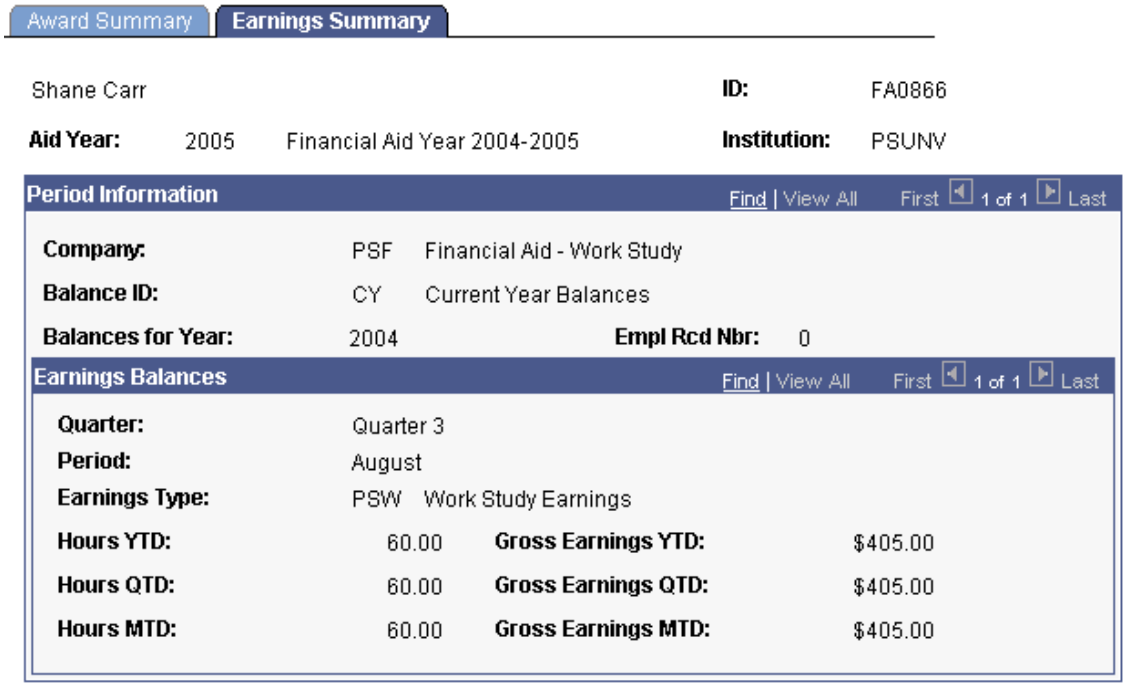


Field or Control	Description
Award Detail	Click to access the Award Detail page.

Viewing Earnings Summary

Access the Earnings Summary page (**Financial Aid**, and then **Awards**, and then **View Award Earnings Summary**, and then **Earnings Summary**).

This example illustrates the fields and controls on the Earnings Summary page.

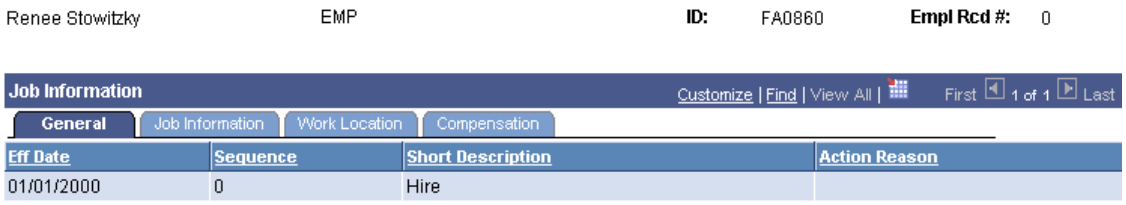


Viewing General Job Information, Work Location, and Compensation

Access the Job Information page (**Financial Aid**, and then **Awards**, and then **View Campus Jobs**, and then **Job Information**).

This example illustrates the fields and controls on the Job Information page: General tab.

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Renee Stowitzky EMP ID: FA0860 Empl Rcd #: 0

Job Information Customize | Find | View All | First 1 of 1 Last

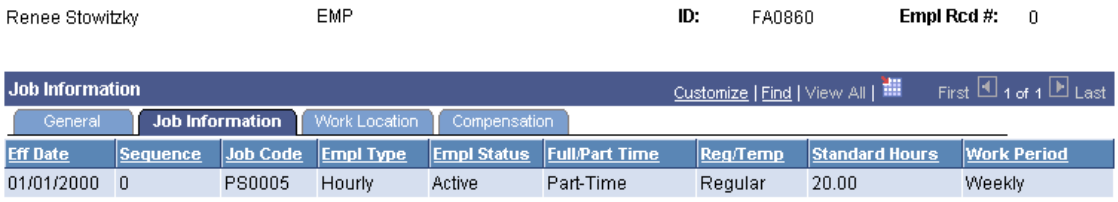
General | Job Information | Work Location | Compensation

Eff Date	Sequence	Short Description	Action Reason
01/01/2000	0	Hire	

Job Information Tab

Select the Job Information tab.

This example illustrates the fields and controls on the Job Information page: Job Information tab.


Renee Stowitzky EMP ID: FA0860 Empl Rcd #: 0

Job Information Customize | Find | View All | First 1 of 1 Last

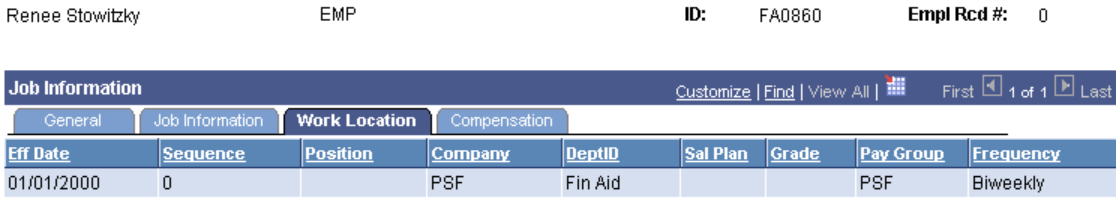
General | Job Information | Work Location | Compensation

Eff Date	Sequence	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
01/01/2000	0	PS0005	Hourly	Active	Part-Time	Regular	20.00	Weekly

Work Location Tab

Select the Work Location tab.

This example illustrates the fields and controls on the Job Information page: Work Location tab.


Renee Stowitzky EMP ID: FA0860 Empl Rcd #: 0

Job Information Customize | Find | View All | First 1 of 1 Last

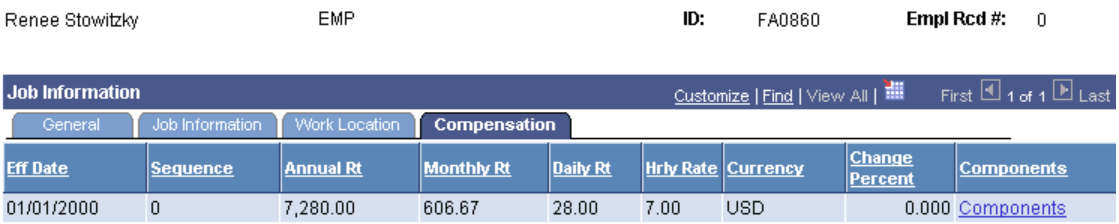
General | Job Information | Work Location | Compensation

Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
01/01/2000	0		PSF	Fin Aid			PSF	Biweekly

Compensation Tab

Select the Compensation tab.

This example illustrates the fields and controls on the Job Information page: Compensation tab. You can find definitions for the fields and controls later on this page.


Renee Stowitzky EMP ID: FA0860 Empl Rcd #: 0

Job Information Customize | Find | View All | First 1 of 1 Last

General | Job Information | Work Location | Compensation

Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
01/01/2000	0	7,280.00	606.67	28.00	7.00	USD	0.000	Components

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Field or Control	Description
Components	Click to access the Salary Components page.

Viewing Salary Components

Access the Salary Components page (click the **Components** link on the Job Information page).

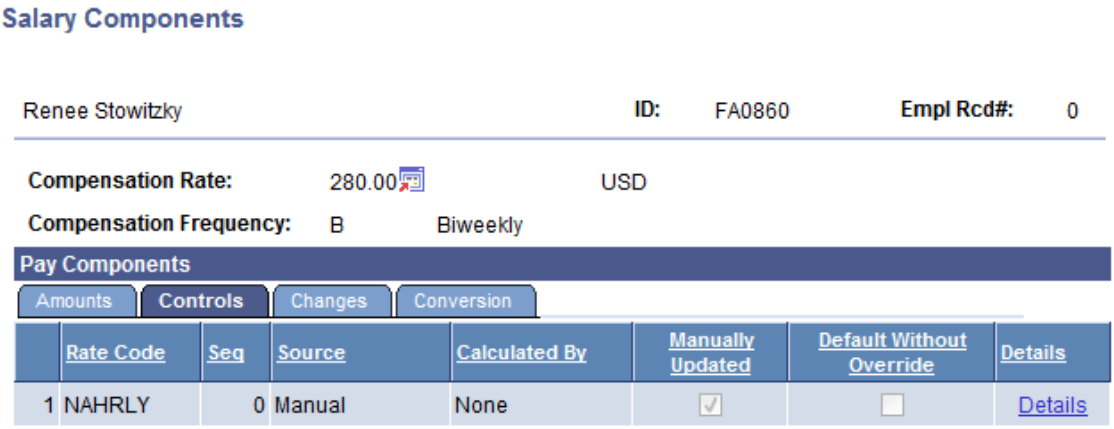
This example illustrates the fields and controls on the Salary Components page: Amounts tab.



Controls Tab

Select the Controls tab.

This example illustrates the fields and controls on the Salary Components page: Controls tab.

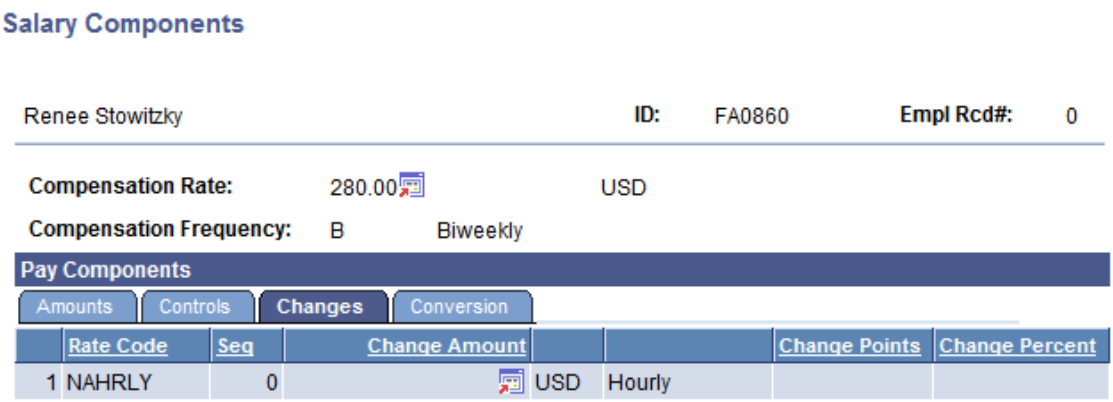


Changes Tab

Select the Changes tab.

This example illustrates the fields and controls on the Salary Components page: Changes tab.

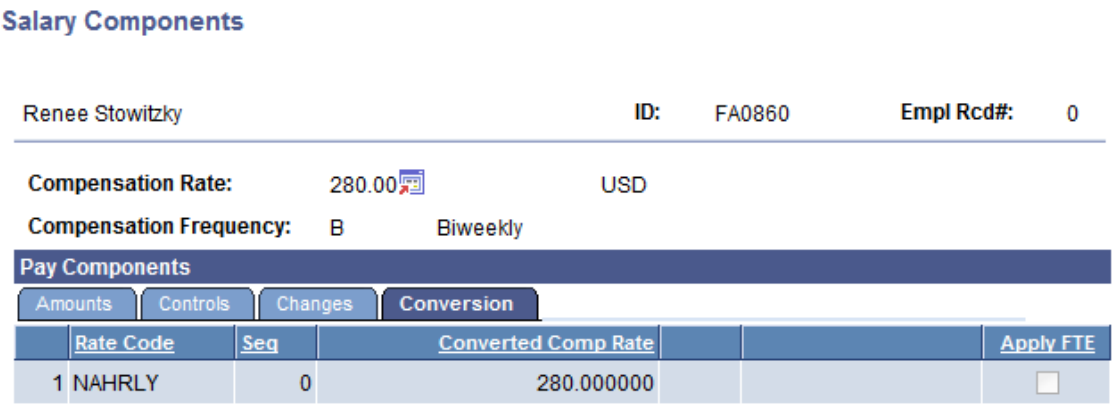
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Conversion Tab

Select the Conversion tab.

This example illustrates the fields and controls on the Salary Components page: Conversion tab.



Viewing the Student's Work History

For information about viewing a student's work history, refer to your Human Resources documentation, see *PeopleSoft HCM: Human Resources Administer Workforce*.

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45

Using the Fiscal Operations Report and Application to Participate

Understanding the FISAP Report

Using the FISAP process, you report expenses for Federal Campus-Based programs—the Federal Supplemental Education Opportunity Grant (FSEOG), Federal Work-Study, and Federal Perkins Loan programs. The Department of Education uses the distribution of expenditures to evaluate whether institutions are appropriating their federal allocation of Campus-Based funds to applicants with the most need. The reported spending levels affect subsequent year allocations. The programs enable you to transfer certain percentages of funds back to last year or forward to the next year to best use unexpended funds.

For your school to transmit, receive, and report FISAP data, you must submit your FISAP expenditures to the Department of Education through the Common Origination and Disbursement (COD) website at www.cod.ed.gov.

Use the provided structured query report (SQR) to print and to enter the calculated values into the Department of Education FISAP Report through the COD website. For audit purposes, the Department of Education requires that you keep data logs and backups of your final FISAP reports and any records necessary to support their data (for example, the source data for the income grid) for three years from the end of the award year for which you submitted the FISAP.

The following FISAP report information is generated:

- Part II, Section E. Assessment and Expenditures: Total Federal Pell Expenditures, and Total Expended for State Grants and Scholarships Made to Undergraduates.
- Part II, Section F. Information on Eligible Aid Applicants for Award Year.
- Part IV, Section C. FSEOG Program: Total Funds to FSEOG Recipients and Non-Federal Share of Funds to FSEOG Recipients.
- Part IV, Section D. Federal Funds Spent for FSEOG Program: Federal Share of Funds to FSEOG Recipients.
- Part VI, Section A. Distribution of Program Recipients and Expenditures by Type of Student.

This section discusses:

- Students selected for the report.
- Assessments and expenditures.
- Information on eligible aid applicants.
- Distribution of program recipients and expenditures by type of student.

Students Selected for the Report

The FISAP report includes only students who:

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- Have an FA Term (financial aid term) build source of *T-Term* or *M-Manual.* You can view the source on the FA Term Build Statistics page.
- Have an official Institutional Student Information Record (ISIR) on file. You can view the status of a student's ISIR using the **SAI Status** (Student Aid Index status) field on the Federal SAI Summary page.
- Are eligible citizens based on the Social Security Administration (SSA) Citizenship Indicator database match, DHS/INS database match, and secondary DHS/INS database match. You can view the student's citizenship status in the **SSA Citizenship Indicator** field on the Database Matches page. Additional logic allows either the **DHS/INS Match Override** or **SSA Citizenship Indicator Override** on the Database Matches page to determine eligible citizenship status. To do this, select either the **SSA Citizenship Override** check box or the **DHS/INS Match Override** check box or both on the Eligible Aid Applicants for Award Year 20nn-20nn page.
- Have awards with financial aid item types of *FSEOG, Federal Perkins Loan, Federal Work-Study,* or *Federal Pell Grant* at the time of disbursement. Even if the institution changes the financial aid item type of the award after disbursing the award, the FISAP report still counts the student and the award amount in the proper category.

The FISAP report uses the following rules when categorizing the selected students:

- The most recent effective-dated sequenced ISIR row for students who meet the above report selection criteria.
- The student's National Student Loan Data System (NSLDS) loan year value determines whether the report counts the student as an undergraduate or graduate for the FISAP report.
- If a student is less than full-time based on enrollment status in the final term of the award year, the system counts the student as less than full-time for the entire year for FISAP purposes.
- Total FISAP income is derived directly from the student's ISIR.
- Aid Year 2023-2024 and prior: The Central Processing System (CPS)/FAFSA Processing System (FPS) assigns students who meet certain tax filing and income criteria for an automatic EFC of zero. These students have an automatic zero EFC flag set to yes on their ISIR. If set to yes, this flag is on the EFC/DB Matches page in the ISIR Corrections component.

  To qualify as an Auto Zero EFC candidate on the report, the CPS/FPS must process the student's ISIR as official and must flag it with a *Y* in the Auto Zero EFC field. If you make changes to the student's ISIR record, and the FM NAC (Needs Analysis Calculator) determines that the student qualifies as an Auto Zero EFC candidate, schools must have the ISIR reprocessed by the CPS/FPS. The FISAP report identifies Auto Zero EFC candidates as all students with a *Y* value for AUTO_ZERO_EFC on the ISIR_COMPUTED table and an *O* value in EFC_STATUS on the ISIR_CONTROL table.
- Aid Year 2024-2025 and after: The FAFSA Processing System (FPS) assigns students who meet certain tax filing status, adjusted gross income (AGI) (if tax filer), state of legal residence, and applicable poverty guidelines criteria a Max Pell Indicator of 1, 2, or 3. To qualify as a Max Pell Indicator record on the report, FPS must process the student's ISIR as official and the Max Pell Indicator field must have a value of 1, 2, or 3. If you make changes to the student's ISIR record and the FM NAC (Needs Analysis Calculator) determines that the student qualifies for a Max Pell Indicator of 1, 2, or 3, schools must have the ISIR reprocessed by FPS. The FISAP report identifies Max Pell Indicator recipients as all students with a 1, 2, or 3 value for SFA_MAX_PELLIND on the ISIR_COMPUTED table and an O value in the EFC_STATUS on the ISIR_CPONTROL table.

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- The third page of the FISAP report identifies graduate students who received an FSEOG as an undergraduate student in a previous term in the same award year. This page is for your information, because these students are included and reported in the appropriate sections of Application Part VI of the Program Summary Grid, based on the Department of Education's instructions. These instructions stipulate that the funds received by these FSEOG recipients should be categorized in the appropriate undergraduate category (dependent or independent by income). If the student received only FSEOG, the student is also included in the undergraduate category for the unduplicated count. If the recipient also received Federal Perkins or Federal Work-Study funds, only the student's undergraduate FSEOG funds must be reported in the appropriate undergraduate category.

  The student is then reported in the unduplicated recipients column only once by using the student's career in the final term of the award year (in this case, as a graduate student). For Federal Perkins and Federal Work-Study students, a student's career for the final term of the award year determines a student's career for FISAP purposes. To verify manually that these students are categorized correctly, use the information on the third page of the SQR report. The system does not generate a third page if no graduate students with an FSEOG exist.

Assessments and Expenditures

Part II, Section E of the FISAP report lists total expenditures in dollar amounts. The report process gathers award disbursement information based on financial aid item type setup to calculate the total Pell Grant expenditures for the aid year. Financial aid item type is defined with a **Source** value of *Federal* and a Federal ID value of *Pell* on the Financial Aid Item Type 1 page. These totals include all students who received a Pell Grant award, regardless of NSLDS loan year.

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

Related Topics

- Defining Financial Aid Item Types
  To set up financial aid item types, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM).
- Reviewing Authorization and Disbursement Results
  This section discusses how to:

Information on Eligible Aid Applicants

Part II, Section F of the report lists the number of eligible aid applicants in an institution by income level. At various taxable and untaxed income levels, it tracks the following information:

FISAP Report Column	Eligible Aid Applicants
A	Dependent undergraduates without degrees.
B	Dependent undergraduates with degrees.
C	Independent undergraduates without degrees.
D	Independent undergraduates with degrees.

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FISAP Report Column	Eligible Aid Applicants
E	Graduate and professional students.

Distribution of Program Recipients and Expenditures by Type of Student

Part VI, Section A lists the number of students receiving FSEOG and Federal Work-Study awards at various undergraduate dependent, undergraduate independent, and graduate and professional income levels. You can view both the number of recipients and amount of funds for each aid type. This section also lists totals for each aid type and for "automatic" zero EFC students, and provides a summary of funds and recipients at each income level.

The counts in this section of the FISAP report are unduplicated counts because the system counts each student once, whether or not a student receives multiple types of awards.

FISAP Report Column	Distribution of Program Recipients
A	Federal Perkins Loan Recipients (no longer required)
B	Federal Perkins Loan Funds (no longer required)
C	FSEOG Recipients
D	FSEOG Funds
E	FWS Recipients
F	FWS Funds
G	Unduplicated Count of Students

Producing the FISAP Report

This section discusses how to:

- Generate the FISAP report.
- (Optional) Use FISAP queries.

Page Used to Produce the FISAP Report

> **Note**
>
> Before you use a FISAP run control component for the first time in a new aid year, be sure to update your security profiles for correct viewing and use.
>
> The aid year for this page is indicated by *20nn - 20nn* in the page name and navigation path, and *nn* in the object name.

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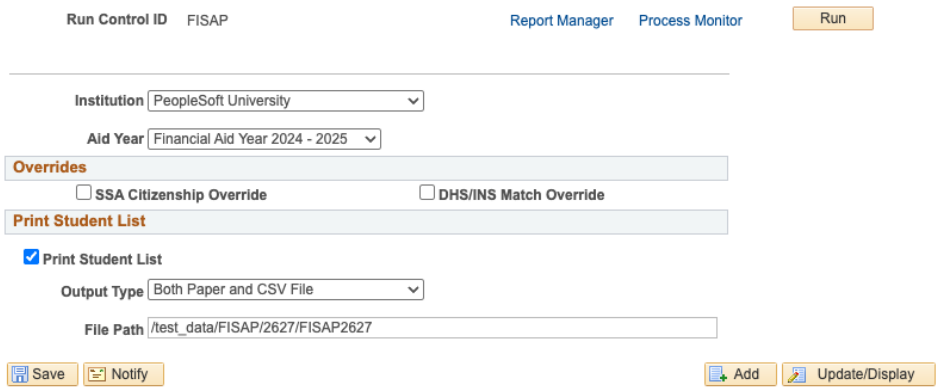
Page Name	Definition Name	Navigation	Usage
Report on Eligible Aid Applicants for Award Year 20nn - 20nn	RUNCTL_FA_FISAPnn	**Financial Aid**, and then **Fund Management**, and then **Generate FISAP Reports**, and then **FISAP Report 20nn-20nn**	Generate the FISAP report.

Generating the FISAP Report

Access the Report on Eligible Aid Applicants for Award Year 20nn - 20nn page (**Financial Aid**, and then **Fund Management**, and then **Generate FISAP Reports**, and then **FISAP Report 20nn-20nn**).

This example illustrates the fields and controls on the Report on Eligible Aid Applicants for Award Year 20nn - 20nn page. You can find definitions for the fields and controls later on this page.

Report on Eligible Aid Applicants for Award Year 2024 - 2025



The system populates, by default, the run controls set up on the Financial Aid Run Controls page. The file name for reports that are generated by this SQR is FAPFSPnn_XX.PDF, where *nn* is the aid year and *XX* is the processing instance.

Field or Control	Description
Institution	Select the institution for which you want to generate the FISAP report. This list reflects those institutions or satellite campuses that you have previously identified.
Aid Year	Select the aid year for which you are reporting, not the aid year for which you are applying.

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Field or Control	Description
SSA Citizenship Override	Select if you want the report to include students with an SSA Citizenship Indicator override on the Database Matches page as eligible citizens on the FISAP.
DHS/INS Match Override	Select if you want the report to include students with a DHS/INS Match override on the Database Matches page as eligible citizens on the FISAP.
Print Student List	When you select this check box, the system prints an itemized list of all students in these two sections: Part II Section F and Part VI Section A.
Output Type	Select from: *Both Paper and CSV File, CSV File,* and *Paper*. When you select *Both Paper and CSV File,* the system creates five separate and distinct comma delimited files in the location entered in the **File Path** field. The details are described as follows: ELIGAPPL: Eligible Applicant Detail: This file is an itemized list of the student data counted in Part II Section F. The file is sorted in the following order: by report column letter, by FISAP Total Income, and then by EMPLID. After the system prints the details of each report column letter, it prints a row with the totals for that column letter. The remaining four files are itemized details of Part VI Section A by fund. DISTFWSP: Federal Work Study Distribution Detail DISTSEOG: SEOG Distribution Detail DISTUNDP: Unduplicated Count Detail ELIGAPPL: Max Pell Indicator Students The four distribution files are sorted in the following order: by Student Type, by FISAP Total Income, and then by EMPLID. Student Type is defined as follows: 1DUG: Dependent Undergraduate Students 2IUG: Independent Undergraduate Students 3GRAD: Graduate Students 4LTFT: Less Than Full Time Students 50EFC: Automatic Zero EFC Students
File Path	Enter the file path and directory name where the CSV file should be written. The process scheduler server must be able to read and write to this path.

After running this report, check the SQR log for messages. If a student has a blank NSLDS loan year or a student with an FSEOG award has a graduate or professional NSLDS loan year for the final term of the award year, the system generates an error in the SQR log when you run the FISAP report. These errors do not prevent the system from generating the FISAP report.

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Using FISAP Queries

These queries are provided as data analysis tools only and are not supported by functionality.

The queries in the following table are available as a baseline data verification tool with which you can define additional queries to meet your institution's needs. No menu path is available. Instead, access the People Tools Query. Use the queries to analyze and compare data after the FISAP SQR has been processed.

> **Note**
>
> To run the FISAP queries, you might need to add tables to either the query tree QUERY_TREE_FA or to a custom query tree, which is accessible to the person who runs the FISAP queries. FISAP queries access the tables in the following list, which are included in the QUERY_TREE_FA. Review your implemented QUERY_TREE_FA, your custom query tree, or both to ensure that all tables accessed by the FISAP queries are included in either of these query trees. Add only those tables that are not already there.
>
> DISB_ID_TBL
>
> FISAP_STDNT_VW
>
> ISIR_COMPUTED
>
> ISIR_CONTROL
>
> ISIR_STUDENT
>
> ITEM_TYPE_FA
>
> PERSONAL_DTSAVW
>
> STDNT_AID_ATRBT
>
> STDNT_AWARDS
>
> STDNT_AWRD_DISB
>
> STDNT_FA_TERM
>
> TERM_TBL

Query ID	Query Objective and Description	Note
QUERIES TO SUPPORT APPLICATION PART II - Section F		
FISAP_ELIG_APP_GRAD_IND	This query identifies graduate professional students for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column E.
FISAP_ELIG_APP_UGRD_DEP_DEG	This query identifies dependent undergraduate students with a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column B.

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Query ID	Query Objective and Description	Note
FISAP_ELIG_APP_UGRD_DEP_NOT_FT	This query identifies dependent undergraduate students who are less than full-time in the final term of their award year for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F.
FISAP_ELIG_APP_UGRD_DEP_NO_DEG	This query identifies dependent undergraduate students without a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column A.
FISAP_ELIG_APP_UGRD_IND_DEG	This query identifies independent undergraduate students with a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column D.
FISAP_ELIG_APP_IND_NO_DEG	This query identifies independent undergraduate students without a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column C.
QUERIES TO SUPPORT APPLICATION PART VI - PROGRAM SUMMARY - Section A		
FISAP_DISTRIBUTION_AUTO_0_EFC	This query identifies students who received Campus-Based funds and whose EFC is considered to be an Auto Zero EFC. The Auto Zero EFC is based on data that is obtained from the student's ISIR record.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Item #18.
FISAP_DISTRIBUTION_GRAD	This query identifies Campus-Based funds that are disbursed to graduate and professional students for Application Part VI - Section A on a detail level.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Item #15.
FISAP_DISTRIBUTION_UGRD_DEPEND	This query identifies Campus-Based funds that are disbursed to dependent undergraduate students for Application Part VI - Section A on a detail level.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Items #1-7.
FISAP_DISTRIBUTION_UGRD_IND	This query identifies Campus-Based funds that are disbursed to independent undergraduate students for Application Part VI - Section A on a detail level.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Items #8-14.
FISAP_NO_DISB_IN_GRAD_MAX_TERM	This query identifies graduate students who did not receive Campus-Based funds in the final term of their award year. This same group of students, however, received Campus-Based funds as undergraduates in previous terms in the same award year.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data.

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Query ID	Query Objective and Description	Note
FISAP_NO_DISB_NOT_FT_MAX_TERM	This query identifies students who did not receive Campus-Based funds and whose enrollment status is classified as less than full-time in the final term of their award year.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data.
FISAP_DISTRIBUTION_LTHT	This query identifies every disbursement for all students who have Perkins, Federal Work-Study, or FSEOG awards, and whose enrollment status for the last term of the award year is less than *full-time*.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data.

Note

The following queries have been updated and new version has been delivered to support FISAP reporting for 2026-2027 and forward:

- FISAP_25_DISTRIBUTION_GRAD
- FISAP_25_DISTRIBUTION_LTHT
- FISAP_25_DISTRIBUTION_UGRD
- FISAP_25_DIST_MAX_PELLIND: This query identifies students who have a Max Pell Indicator value of 1, 2, or 3 on their official ISIR record.
- FISAP_25_DIST_ELIG_APP_GRAD_IND
- FISAP_25_ELIG_APP_UGRDINDNODEG
- FISAP_25_ELIG_APP_UGRD_DEPNOFT
- FISAP_25_ELIG_APP_UGRD_DEP_DEG
- FISAP_25_ELIG_APP_UGRD_IND_DEG

See also

- *PeopleTools: Query*, "PeopleSoft Query Security"
- *PeopleTools: Security Administration*

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46

Using Common Origination and Disbursement

Overview and Setup for COD for Pell Grants and Direct Loans

Common Origination and Disbursement (COD) is the system you use to communicate with U.S. Department of Education (ED) for Pell Grant (Pell) and Direct Loan (DL) awards and disbursements.

> **Note**
>
> For information about using COD to report Federal Work-Study earnings to ED, see Overview and Setup for COD for Federal Work-Study Earnings Reporting.

Before processing COD files for Pell and DL, you must complete the appropriate COD award program setup options for Pell Payment and Direct Loans. Verify that you have done these setups:

> **Warning**
>
> Do not change Pell ID Reporting values in the middle of an aid year. The Pell Grant payment and origination processes reference student awards which are in an Institution context and not directly related to a Pell ID. The Pell ID Reporting for Pell Grant processing is derived from the Institution using the Pell Payment Setup.

Process	Steps
Pell Payment	Select the COD Full Participant check box on the Pell Payment Setup page (PELL_PMT_OPTION) and enter your SFA Common School ID. Enter the corresponding Common School ID for each Attended Pell ID on the Pell Attending page (PELL_ATTENDING).
Direct Loan	Select the COD Full Participant check box on the Loan Institution Table (LOAN_INST_TABLE) and enter your SFA Common School ID in the **COD Common ID** field. Establish reporting/attended school relationships by associating Attended School Routing IDs with Reporting school Routing ID on Loan Attended Routing ID page (SFA_COD_LN_ATTEND)
Campus OPEID for Direct Loans and Pell Payments	Link Campuses with OPEID codes on the Campus OPEID page (SFA_COD_CAMP_OPEID).

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See Defining Pell Payment Setup.

See Setting Up Loan Institution Table for Direct Lending COD.

See Setting Up Attended School Routing ID's.

See Defining Your Campus OPEID Codes.

Creating COD Files for Pell Grants and Direct Loans

Each COD award program has its own outbound process. Run the appropriate outbound process to create XML records in the Common Record format for the type of COD award program for which you want to exchange data.

This section lists common elements and discusses how to:

- Create a COD file for Pell.
- Create a COD file for Direct Loans.
- Process COD names and addresses.

Page Used to Create COD Files

Page Name	Definition Name	Navigation	Usage
Pell Outbound	SFA_RUNCTL_PL_OUT	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Generate Pell Data**, and then **Pell Outbound**	Generates COD Origination and Disbursement records for Pell, inserts data in the COD staging tables, and creates an XML file that contains Common Records.
Direct Loan Outbound	SFA_RUNCTL_DL_OUT	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Generate Direct Loan Data**, and then **Direct Loan Outbound**	Generates COD Origination and Disbursement records for Direct Loan, inserts data in the COD staging tables, and creates an XML file that contains Common Records.

Creating a COD File for Pell

Access the Pell Outbound page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Generate Pell Data**, and then **Pell Outbound**).

The Pell Outbound process (PELLOUT) updates Pell origination tables, updates the COD staging table, and creates an XML file that contains Common Records. You can run this process for multiple attending school IDs by inserting additional rows. The process has two steps:

1. FAPPLOUT selects all originated Pell grants that are ready for transmission. If all data required to transmit the award is present, the data is moved to the COD staging tables. Selected records that are not processed are documented in the message log of the process.

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2. SFA_COD_OUT creates the common record XML file in the location and name specified in the run control.

Field or Control	Description
SFA Common School ID (student financial assistance common school identification)	Select your institution's identification number.
Schema Version	**Schema Version** is populated based on Aid Year.
File Path and Name	Enter the file path for which the process should create the XML file in and the name of the XML file. File names must include '.xml' at the end of each filename.
Pell Origination Outbound	Select this check box to process Pell origination outbound records.
Pell Disbursement Outbound	Select this check box to process Pell disbursement outbound records. When you select Pell disbursement, the system automatically activates the **Pell Origination Outbound** check box.
Send Disb if Verification "W" (send disbursement if verification "W")	Select this check box to send the disbursement if the verification status code is W (without documentation). This value is used only for disbursement.
Validate Only	Select this check box along with the **Pell Origination Outbound** or **Pell Disbursement Outbound** check boxes to run the process in simulation mode. Use this feature to check your origination and disbursement data in Manage Pell Payment component for statuses and failed validation errors. After you verify your data, deselect the **Validate Only** check box, then run your process again.

Pell Grant Origination Outbound Validation Edits

Validation Edits
Address invalid or incomplete
Citizenship not U.S. citizen or eligible non-citizen
Date of Birth format invalid
SSN not all numeric or at least 9 digits
Student Eligibility Code not present or invalid

Pell Grant Disbursement Outbound Validation Edits

Validation Edits
CIP Code not populated
Credential Level is missing
Enrollment Status is not F, Q, H, or L
Payment Period Start Date format is invalid
Program Length missing or contains more than one value

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Validation Edits
Special Program Flag is missing
Student Eligibility Code not present or invalid
Weeks Program Academic Year is less than 26

Creating a COD File for Direct Loans

Access the Direct Loan Outbound page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Generate Direct Loan Data**, and then **Direct Loan Outbound**).

The Direct Loan Outbound process DLOUT) updates Direct Loan origination tables, updates the COD staging table, and creates an XML file that contains Common Records. You can run this process for multiple Academic Careers within an Academic Institution/Aid Year. You need a new run control row for each combination of required parameters.

1. FAPDLOUT selects all originated Direct Loans that are ready for transmission. If all data required to transmit the award is present, the data is moved to the COD staging tables. Selected records that are not processed are documented in the message log of the process.
2. SFA_COD_OUT creates the common record XML file in the location and name specified in the run control.

Field or Control	Description
Attended School Routing ID	Select appropriate Attended School Routing ID. **Note:** DLOUT generates separate files for each unique **Attended School Routing ID.** If your institution supports multiple Attending School IDs, then separate **Selection Criteria** rows must be added for each.
Schema Version	**Schema Version** is populated based on Aid Year.
File Path and Name	Enter the file path where the XML file should be created and the name of the XML file. File names must include '.xml' at the end of each filename. **File Path and Name** must be a unique XML file based on the unique combination of **Selection Criteria** values or the process overwrites the contents of the existing XML file.
Originations	Select this check box to process Direct Loan origination outbound records.
Origination Changes	Select this check box to process changes to Direct Loan origination outbound records.
Disbursements	Select this check box to process Direct Loan disbursement outbound records.

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Field or Control	Description
Validate Only	Select this check box along with the **Originations**, Origination Changes, or **Disbursements** check box to run the process in simulation mode. Use this feature to check your origination and disbursement data on the View Direct Loan, Loan Processing Actions component for statuses and failed Validation errors. After you verify your data, deselect the **Validate Only** check box, then run your process again.

Direct Loan Outbound Validation Edits

Validation Edits
Invalid or missing Student SSN
Invalid Student Birthdate
Invalid Student Name
Invalid Student Middle Initial
Student Address is Incomplete
Student is not eligible (Citizenship Status)
Loan Period greater than 12 months. (Edit no longer evaluated for Aid Year 2009 and beyond.)
Loan Period End Date before Start Date
Disb Date < Loan Period Start Date (-10 Days)
Disb Date > Loan Period End Date (+120 Days)
Sum of Disbursements > Loan Approved Amount
Invalid Dependency Status
Invalid Student Default/Overpay
Incorrect Disbursement Net Amount
Incorrect Disbursement Rebate Amount
Invalid or missing Borrower SSN
Borrower and Student SSN are the same
Invalid Borrower Birthdate
Invalid Borrower Name
Invalid Borrower Middle Initial
Borrower Address is Incomplete
Invalid Borrower Default/Overpay
Borrower is not eligible (Citizenship Status)
Preprof and Health cannot be selected on same loan.
Dependency Status set to D and Grade Level >= 6
Total Disbursed amount cannot be greater than the lesser of the Award Amount or the Endorser Amount. Applicable only for PLUS loans (parent and graduate student).
No ATB Record Data is Present. Evaluated beginning with Aid Year 2014 and beyond.
ATB values 03 (State Process) and 05 (Other) are no longer valid reporting values. Effective with Aid Year 2012 and beyond.

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Validation Edits
No SULA data is available
Published Program Length is missing
More than one value of Special Program Length
Weeks Program Acad Year less than 26
Change to Special Pgm causes Grade Level mismatch
Credential Level does not match Student Grade Lvl
Payment Period Start Dt outside Award Begin/End Dt
Enrollment Status is Invalid
CIP Code is Blank
Change to Grade Level causes Special Pgm mismatch
Special Program is missing
Special Program/Program Length combo mismatch
Special Program/Grade Level combo mismatch
Invalid Payment Period Start Date
Credential level missing

Processing COD Names and Addresses

The system retrieves student name information that is submitted to the COD for processing from ISIR tables and Campus Community. To process a name change, change the name on the Campus Community Bio/Demographic pages and process an ISIR correction through the Correct ISIR records component (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR Records).

COD returns a warning edit (Edit 120) when a complete student address does not exist on the incoming record. Therefore, both Direct Lending and Pell COD addresses must come from the same sources:

- Campus Community (Managing Biographical Information, Managing Addresses and Phone, Addresses)
- Address Usage page that is based on your ISIR Address Usage parameters and the owning School Code that you select.

You cannot override the address using the Direct Loan Address page. Process any changes to the student's address in Campus Community using the override or correction functionality in ISIR address.

Related Topics

- Reviewing FAFSA Student Information
  Access the Student Information page (**Financial Aid**, and then **Federal Application Data**, and then **Correct 20nn-20nn ISIR records**, and then **Student Information**).

Reviewing COD Data for Pell Grants and Direct Loans

The View COD Data component is used to view all COD data for all COD award programs supported by the system: Pell Grant and Direct Loan. The View COD Data component presents both inbound and outbound COD data.

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This section discusses how to:

- View COD document information.
- View document response information.
- View COD school information.
- View reporting school summary information.
- View reporting school response.
- View attended school response.
- View student biographical and demographic information.
- View student address information.
- View student phone number information.
- View student response data.
- View a student's award information.
- View responses to award rejections and corrections.
- View additional loan information.
- View loan response information.
- View borrower information.
- View borrower address information.
- View borrower phone number information.
- View borrower response data.
- View disbursement information.
- View responses to disbursement rejections and corrections.

Common Elements Used in This Section

Field or Control	Description
Document ID	Displays the date and time stamp with the Source Entity ID.
Document Type	Displays the type of document being returned from COD. Values are: *BN:* Booking Notification *CO:* Credit Decision Override *EC:* Entrance Counseling *ND:* Negative Disbursement *PS:* Payment to Servicing *PN:* Promissory Note *RS:* Response *SG:* System Generated *SP:* PLUS Application Acknowledgement *SU:* SULA Calculation Acknowledgement (system generated) *WB:* Web Initiated

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Field or Control	Description
Processing Status	Displays the status of the batch: *Outbound and Generated for outbound files* *Processed and Loaded for inbound files*
Reset	Available when you outbound a file to allow you to regenerate the XML file. When you select **Reset,** the system opens the **File Path and Name** field and updates the processing status from *Generated* to *Outbound.* You can correct and update the path if necessary. You must save the page before exiting to save the status change. Then when you rerun PELLOUT or, DLOUT, the system regenerates an XML file using the same Document ID. Running this process only calls the Application Engine section of the outbound process (PELLOUT/ DLOUT). The system creates an XML file only for records with the same Document ID associated with the reset process. You can update the File and Name path in the run control if you are certain that these are the *only* records to be picked up by the PELLOUT/ DLOUT process. **Note:** You must use a unique file path and name when you run the PELLOUT or DLOUT process. If they are not unique, the new records overwrite the reprocessed records in the XML file creation. File names must include '.xml' at the end of the filename.
Receipt Date	Displays the date and time stamp indicating receipt of the document at COD.
Document Status	Displays the status of the processed document on COD. Values are: *A:* Accepted *R:* Rejected *D:* Duplicate
Process Date	Displays the date the document information was processed at COD.
ID	Displays the student's unique identification.
Reporting School ID	Displays an identification that provides a logical grouping of elements related to Reporting School Entity Information.
Attending School ID	Displays an identification that provides a logical grouping of elements related to Attending School Entity Information.
Response Indicator	Displays the result of processing the COD. Values are: *A:* Accepted *R:* Rejected *D:* Duplicate *C:* Corrected

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Field or Control	Description
Address Sequence	Identifies the order in which address updates occurred. Values are *1* and *2*.
Phone Sequence	Identifies the order in which phone number updates occurred. Values are *1*, *2*, and *3*.
Response Sequence Number (error code sequence)	Identifies the order in which error codes were received. Values are *1* through *999*.

> **Note**
>
> For additional field descriptions in this topic, refer to the U.S. Department of Education Common Origination and Disbursement Technical Reference.

Pages Used to Review COD Data

Page Name	Definition Name	Navigation	Usage
COD Document	SFA_COD_DOCUMENT	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Document**	View information at the COD document level on your outbound and inbound XML record transmissions.
Document Response	SFA_COD_DOC_RSP	Click the **Response Information** link on the COD Document page.	View document level response rejection or correction information from COD.
COD School Information	SFA_COD_SCHOOL_INF	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD School Information**	View summary and response information at the reporting and attending school level.
Reporting School Summary	SFA_COD_RPRTSCHL_SUM	Click the **Reporting School Summary**link on the COD School Information page.	View document summary totals by award type.
Reporting School Response	SFA_COD_REPORT_RSP	Click the **Reporting School Response** link on the COD School Information page.	View reporting school level response rejection or correction information.
Attended School Response	SFA_COD_ATTEND_RSP	Click the **Response Information** link on the COD School Information page.	View attending school level response rejection or correction information.

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Page Name	Definition Name	Navigation	Usage
COD Student	SFA_COD_STUDENT	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Student**	View a student's biographical and demographic information.
Student Address	SFA_COD_ADDRESS	Click the **Address Information** link on the COD Student page.	View student address information.
Student Phone	SFA_COD_PHONE	Click the **Phone Number Information** link on the COD Student page.	View student phone number information.
Student Response	SFA_COD_STU_RSP	Click the **Response Information** link on the COD Student page.	View response data for rejections or corrections.
COD Award	SFA_COD_AWARD	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Award**	View a student's award information.
Award Response	SFA_COD_AWARD_RSP	Click the **Response Information** link on the COD Award page.	View responses to award rejections and corrections.
Loan Information	SFA_COD_LOANINFO	Click the **Additional Loan Information** link on the COD Award page.	View additional loan information.
Loan Response	SFA_COD_LN_RSP	Click the **Response Information** link on the Loan Information page.	View loan level response rejection or correction information.
Borrower Information	SFA_COD_BORROWER	Click the **Borrower Information** link on the COD Award page.	View borrower information.
Borrower Address	SFA_COD_BORR_ADDR	Click the **Address** link on the Borrower Information page.	View borrower address information.
Borrower Phone	SFA_COD_BORR_PHONE	Click the **Phone Number Information** link on the Borrower Information page.	View borrower phone information.
Borrower Response	SFA_COD_BORR_RSP	Click the **Response Information** link on the Borrower Information page.	View borrower level response rejection or correction information.

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Page Name	Definition Name	Navigation	Usage
COD Disbursement	SFA_COD_DISB	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Disbursement**	View disbursement information, including disbursement amount and disbursement date.
Disbursement Response	SFA_COD_DSB_RSP	Click the **Response Information** link on the COD Disbursement page.	View responses to disbursement rejections and corrections.

Viewing COD Document Information

Access the COD Document page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Document**).

This page displays information at the COD document level on your outbound and inbound XML record transmissions.

Field or Control	Description
Inbound Date Time	Indicates the date and time that the file was loaded into your system.
Outbound Date Time	Indicates the date and time that the file was created for outbound transmission to the COD system.
Response Information	Click this link to access the Document Response page to review document level response rejection or correction information.

Viewing Document Response Information

Access the Document Response page (click the **Response Information** link on the COD Document page).

This page displays rejection or correction information from COD.

Viewing COD School Information

Access the COD School Information page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD School Information**).

This page displays summary and response information at the reporting and attending school level.

Field or Control	Description
Reporting School Summary	Click this link to access the Reporting School Summary page to review document summary totals.

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Field or Control	Description
Response Information	Click this link to access the Attended School Response page to review attending school level response rejection or correction information.
Reporting School Response	Click this link to access the Reporting School Response page to review reporting school level response rejection or correction information.

Viewing Reporting School Summary Information

Access the Reporting School Summary page (click the **Reporting School Summary** link on the COD School Information page).

This page displays document summary totals by award type.

Viewing Reporting School Response

Access the Reporting School Response page (click the **Reporting School Response** link on the COD School Information page).

This page displays reporting school level response rejection or correction information.

Viewing Attended School Response

Access the Attended School Response page (click the **Response Information** link on the COD School Information page).

This page displays attended school level response rejection or correction information.

Viewing Student Biographical and Demographic Information

Access the COD Student page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Student**).

Field or Control	Description
Undergraduate Sum Actual Sub Usage Periods	Displays a borrower's Subsidized Usage for undergraduate Subsidized Usage with values at a student level. Displayed values are actual values. meaning that at least one actual disbursement has taken place.
Non-Credential Teacher Certification Sum Actual Sub Usage Periods	Displays a borrower's Subsidized Usage for non-credential teacher certification Subsidized Usage with consumption values at a student level. Displayed values are actual values. meaning that at least one actual disbursement has taken place.
Address Information	Click this link to access the Student Address page to review student address information.
Phone Number Information	Click this link to access the Student Phone page to review student phone number information.

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Field or Control	Description
Response Information	Click this link to access the Student Response page to review response data for rejections or corrections.

Viewing Student Address Information

Access the Student Address page (click the **Address Information** link on the COD Student page).

This page displays address information that you report for the student.

Viewing Student Phone Number Information

Access the Student Phone page (click the **Phone Number Information** link on the COD Student page).

This page displays phone number information that you report for the student.

Viewing Student Response Data

Access the Student Response page (click the **Response Information** link on the COD Student page).

This page displays student level response rejection or correction information.

Viewing a Student's Award Information

Access the COD Award page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Award**).

The COD Award tab provides detailed data for each COD award program: Pell Grant and Direct Loans. Each COD award program has its own separate information section.

> **Note**
>
> The system does not process COD web-initiated response files (document type WB) or the System-Generated PLUS Application Acknowledgment files (document type SP). The COD import process only loads the COD XML data from these document types into the COD staging tables to view and query.
>
> The system does import Entrance Counseling records (Document Type EC) from COD which are processed by the Process COD Counseling Data process to update the Loan Counseling application table (SFA_LN_CNSL_TBL).
>
> The system does import the SULA Calculation Acknowledgement file (Document Type SU) from COD.

See Managing Loan Counseling Data.

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Links

Field or Control	Description
Additional Loan Information	Click this link to access the Loan Information page to review additional loan information.
Borrower Information	Click this link to access the Borrower Information page to review borrower information.

DL Subsidized

COD calculates a borrower's Subsidized Usage for two categories of usage: *Undergraduate Subsidized Usage* and *Non-Credential Teacher Certification Usage*. Depending upon whether the Special Programs tag equals T (Non-Credential Teacher Certification), one or both of these categories may be populated with duration, consumption, and remaining eligibility values. Also displayed is either anticipated and/or actual values, depending upon whether at least one actual disbursement has taken place (driven by Disbursement Release Indicator equaling true or false).

Counseling Information

View data provided on the CRECMYOP message class or document type = EC.

Viewing Responses to Award Rejections and Corrections

Access the Award Response page (click the **Response Information** link on the COD Award page).

This page displays student award level response rejection or correction information.

Viewing Additional Loan Information

Access the Loan Information page (click the **Additional Loan Information** link on the COD Award page).

Field or Control	Description
Response Information	Click this link to access the Loan Information Response page to review rejection or correction information.

Viewing Loan Response Information

Access the Loan Response page (click the **Response Information** link on the Loan Information page).

This page displays student loan award level response rejection or correction information.

Viewing Borrower Information

Access the Borrower Information page (click the **Borrower Information** link on the COD Award page).

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This page displays borrower information and provides access to the borrower's address, telephone number, and response information.

Field or Control	Description
Address Information	Click this link to access the Borrower Address page to view the borrower's address.
Response Information	Click this link to access the Borrower Response page to view the borrower's response information.
Phone Number Information	Click this link to access the Borrower Phone Number page to view the borrower's telephone number.

Viewing Borrower Address Information

Access the Borrower Address page (click the **Address** link on the Borrower Information page).

This page displays the borrower's address information.

Viewing Borrower Phone Number Information

Access the Borrower Phone page (click the **Phone Number Information** link on the Borrower Information page).

This page displays the borrower's telephone information.

Viewing Borrower Response Data

Access the Borrower Response page (click the **Response Information** link on the Borrower Information page).

This page displays the borrower's response to rejection or correction information.

Viewing Disbursement Information

Access the COD Disbursement page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View COD Data**, and then **COD Disbursement**

Field or Control	Description
Workforce Pell Tuition & Fees	For aid year 2026–2027 and later, review this field.
Response Information	Click this link to access the Disbursement Response page to view responses for disbursement rejections and corrections.

Viewing Responses to Disbursement Rejections and Corrections

Access the Disbursement Response page (click the **Response Information** link on the COD Disbursement page).

This page displays student disbursement level response rejection or correction information.

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Loading COD XML Files for Pell Grants and Direct Loans

This section discusses how to load an XML file. The Import COD Response Data component loads any COD XML file in the COD tables regardless of the COD award program,

Page Used to Load COD XML Files

Page Name	Definition Name	Navigation	Usage
Common Origination and Disbursement Inbound	SFA_RUNCTL_COD_INB	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Import COD Response Data**, and then **Common Origination and Disbursement Inbound**	Load a COD response or system-generated file into your system.

Loading a COD XML File

Access the Common Origination and Disbursement Inbound page (**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Import COD Response Data**, and then **Common Origination and Disbursement Inbound**).

Enter the location and name of the file to import into your system.

The COD Inbound process (CODIN) is a two-step PSJob:

- The SFA_COD_IN process loads the XML file into the COD staging tables.
- The FAPCODIN process is a common process for DL and PELL, and it updates different application data depending on what document type you are loading.

Submitting Documents for Pell Grants and Direct Loans

You can submit common record documents to the COD System using the COD website or by batch processing. For batch processing, use the SAIG Electronic Data Exchange.

> **Note**
>
> The system does not process COD web-initiated response files (document type WB) or the System-Generated PLUS Application Acknowledgment files (document type SP). The COD import process only loads the COD XML data from these document types into the COD staging tables to view and query.
>
> The system does import Entrance Counseling records (Document Type EC) from COD which are processed by the Process COD Counseling Data process to update the Loan Counseling application table (SFA_LN_CNSL_TBL).

See Managing Loan Counseling Data.

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> **Note**
>
> There must be a one-to-one match between a system generated outbound record and the corresponding inbound acknowledgement record. For example, a Direct Loan Origination must be created (and sent to COD) using the Oracle Campus Solutions Financial Aid system. COD provides a corresponding response acknowledgement record using the same Document ID that is used to match and update the appropriate document and award programs.

Overview and Setup for COD for Federal Work-Study Earnings Reporting

Common Origination and Disbursement (COD) is the system you use to communicate with U.S. Department of Education (ED) to report Federal Work-Study (FWS) earnings.

> **Note**
>
> For information about using COD to report Federal Work-Study earnings to ED, see Overview and Setup for COD for Pell Grants and Direct Loans.

This section discusses how to:

- Setup Equation Engine Tables.
- Setup Equation Engine Authorizations.

Before using the application to report FWS earnings to COD, add or confirm the required Equation Engine setups.

Pages Used to Setup FWS Earnings Reporting

Page Name	Definition Name	Navigation	Usage
Equation Data Tables	EQTN_DATA_TBL	**Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Data Tables**	Setup Equation Data Tables for Population Select.
Equation Table Authorization Node	EQTN_TBAUTH_NODE	**Setup SACR**, and then **Security**, and then **Tables and Views**, and then **Tables and Views**	Setup bind records in the Equation Security Tree.

Setup Equation Data Tables

Setup Equation Data Tables for FWS Earnings reporting.

Access the Equation Data tables: **Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Equation Data Tables**.

Add the Bind and Target Records:

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- Bind Records are:
  - SFA_FWS_OUT_BND.
  - SFA_FWS_STG.
- Target Record is SFA_FWS_OUT_TGT.

.

Setup Equation Table Authorizations

You can setup Equation Table Authorizing Node for FWS Earnings reporting.

Access the Tables and View page: **Set Up SACR**, and then **Security**, and then **Tables and Views**, and then **Tables and Views**

Open the **PUBLIC** Equation Table Authorization Class and add rows for the Bind and Target **Data Records**:

- SFA_FWS_OUT_BND with an **Authorization Level** of **Read**.
- SFA_FWS_OUT_TGT with an **Authorization Level** of **Write**.

Managing COD Federal Work-Study Earnings Data

You can create and report Federal Work-Study (FWS) Earnings data with Common Origination and Disbursement (COD).

This section discusses how to:

- Manually add FWS Earnings data.
- Create a file to transmit FWS Earnings data to the U.S. Department of Education (ED).
- Import a FWS Earnings response file from ED.
- View FWS COD data.

Pages Used to Manage FWS Earnings Reporting Data

Page Name	Definition Name	Navigation	Usage
Run File Parser	SCCFP_RUNCNTL	**Setup SACR**, and then **System Administration**, and then **Utilities**, and then **File Parser**, and then **Run File Parser**	Run the File Parser process to populate the FWS Earnings staging tables.
Federal Work Study Data	SFA_FWS1	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Federal Work Study Data**	Create or update FWS Earnings data by student.

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Page Name	Definition Name	Navigation	Usage
Generate Federal Work Study	SFA_RUNCTL_FWS_OUT	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Generate Federal Work Study**	Create a FWS Earnings file to report to COD.
Import FWS Response Data (import federal work study response data)	SFA_RUNCTL_FWS_INB	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Import FWS Response Data**	Import the FWS Response file from COD.
View FWS COD Data (view federal work study common origination and disbursement data)	SFA_FWS_INQUIRY	**Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View FWS COD Data**	View data from the FWS COD response file.

Run File Parser to Load FWS Earnings Data

You can use File Parser to load FWS Earning Data into staging tables.

File Parser setup is delivered with the application. Here is a description of the delivered setups for the **Context Definition** and **File Mapping Definition** pages.

Access the Context Definition page: **Setup SACR**, and then **System Administration** , and then **Utilities**, and then **File Parser**, and then **Context Definition**.

These are the delivered values in the **Context Definition** page:

- **Context Name** = FWS Reporting to COD
- **Record** = SFA_FWS_STG
- **Sort Order** = 1

In the **Staging Table Fields**, and then **Mapping** tab:

- The **Visible for Mapping** check box is selected for these fields:
  - EMPLID
  - CALENDAR_YEAR
  - SFA_FWS_SEQ
  - INSTITUTION
  - AID_YEAR
  - ISIR_TXN_NBR
  - SFA_FWS_AMOUNT
- SFA_FWS_SEQ field **Mapping Action** is set to **Calculated**.
- SFA_FWS_AWRD_TYPE field **Mapping Action** is set to **Default Value** and "FWS" is set as the **Value**.

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- SFA_FWS_STATUS field **Mapping Action** is set to **Default Value**and "P" is set as the **Value**.

In the **Staging Table Fields**, and then **Calculated Field Application Class** tab, these values are set for the SFA_FWS_SEQ field:

- **Root Package ID** = SFA_FWS.
- **Qualified Package/Class Path** = FileParser.
- **Application Class ID** = FWSSeqNumber.

For more information on Context Definition setup, see Campus Community Fundamentals: Setting Up Context Definitions.

Access the File Mapping Definition page: **Setup SACR**, and then **System Administration** , and then **Utilities**, and then **File Parser**, and then **File Mapping Definition**.

These values are set for the **File Mapping Definition** page:

- **Map Name** = FWS Reporting to COD Import.
- **Context Definition** = FWS Reporting to COD.
- **File Type** = Delimited.
- **Status** = Active.
- **Delimiter** = Comma.
- **Qualifier** = ".

In the **File Layout** tab, the **Staging Table** is set to SFA_FWS_STG.

In the **Mapping** tab, the **Mapping Action** for all fields is set to **Direct from File** except for SFA_FWS_SEQ. This field has a mapping action of **Calculated**.

In the **Mapping**, and then **Field Mapping Detail**, and then **Calculated Field Application Class** tab, delivered values are:

- **Root Package** = SFA_FWS.
- **Qualified Package/Class Path** = FileParser.
- **Application Class ID** = FWSSeqNumber.

In the **Preview Data** tab, you can attach a test file to preview the data. The file must be in a .csv format without column headers.

For more information about File Mapping Definition setup see, Campus Community Fundamentals: Setting Up File Mapping Definitions.

Access the Run File Parser page: **Setup SACR**, and then **System Administration**, and then **Utilities**, and then **File Parser**, and then **Run File Parser**.

Setup run control:

1. Use **File Mapping ID** = FWS Reporting to COD.
2. Enter the path to file you want to upload.
3. After file upload is completed, navigate to **Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Federal Work Study Data** to review Federal Work Study Data page and verify record was uploaded.

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Manually Enter or Update FWS Earnings Data

Create or update a student's FWS Earnings data.

Access Federal Work Student Data page: **Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Federal Work Study Data**.

This page displays biographic information, calendar year, and award data by Aid Year. You are also able to enter data when adding a new record or update data for existing records. When entering new records, the key fields are EmplID, Calendar Year, and Financial Award Type, for example FWS.

Field	Description
Edit Award Information	Select this check box to update fields in the **Awards** table. If you are adding a new record or for an existing row in the **Awards** table with a **Status** of **Pending Transmission**, you can edit the following fields: • **CPS/FPS Transaction Number** • **Aid Year** • **Earnings Amount** • **Status**. For this field, the options for updating are dependent upon the existing **Status**.
CPS/FPS Transaction Number	Enter the **CPS/FPS Transaction Number**.
Aid Year	Enter the **Aid Year**. You may use multiple rows for multiple Aid Years.
Earnings Amount	Enter the FWS earnings.
Status	Select a **Status**: • **Accepted** • **Error** • **Pending Transmission** • **Transmitted** For new records, **Status** defaults to **Pending Transmission**.

Generate FWS Earnings Reporting Files

You can generate an XML file to report FWS Earnings to send to COD.

Access the Generate Federal Work Study page: **Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Generate Federal Work Study**

> **Note**
>
> Make sure you have completed the required Equation Engine setup before using this process. For more information, see Pages Used to Setup FWS Earnings Reporting.

Use these Fields and Controls in the **Federal Work Study Data** tab.

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Field or Control	Description
Calendar Year	Enter the **Calendar Year** for which you want to report FWS Earnings.
Attended School Routing ID	Select appropriate **Attended School Routing ID**. **Note:** The application generates separate files for each unique **Attended School Routing ID.** If your institution supports multiple Attending School IDs, then separate **Selection Criteria** rows must be added for each.
Campus Based Schema Version	The **Campus Based Schema Version** is populated based on Aid Year. FWS uses a different schema than Pell and Direct Loan.
File Path and Name	Enter the file path where the XML file should be created and the name of the XML file. File names must include '.xml' at the end of each file name. **File Path and Name** must be a unique XML file based on the unique combination of **Selection Criteria** values or the process overwrites the contents of the existing XML file.
FWS Outbound	Select this check box to process FWS Earnings outbound records.
Validate Only	Select this check box to run the process in simulation mode. Use this feature to check your data on the View FWS COD Data page for statuses and failed Validation errors. After you verify your data, deselect the **Validate Only** check box, then run your process again.
Log Messages	Select this check box to log any errors encountered when generating the FWS Earnings data; for example, missing student address, SSN, invalid values or format for certain fields, and so on. This is useful for debugging purposes but not suggested for use in production.

The **FWS Processing Actions** tab displays a history of **Status** changes for the sequence.

Importing FWS Response Data

You can import the FWS Response File from COD.

Access the Import FWS Response Data page: **Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **Import FWS Response Data**.

Enter the **File Path and Name** and run the process.

Viewing FWS Response Data

You can view FWS COD File Data.

Access the View FWS COD Data page: **Financial Aid**, and then **File Management**, and then **COD Full Participant**, and then **View FWS COD Data**.

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You can view the FWS COD XML file data on this page.

Click the **Reset** button on the **COD Document** tab to regenerate the XML file. This allows the File Path and Name to be edited. If you edit the File Path and Name, you must also update the path on the View COD Data page and the Generate FWS page before rerunning the process. New students aren't selected by rerunning the process.

Using Common Origination Message Classes

Various message classes are to be used by Full Participants for sending and receiving data to and from the Common Origination and Disbursement (COD) System for each current processing year. Oracle supports the message classes listed in the following table. The aid year is indicated by *nn.*

See the U.S. Department of Education's *Common Origination and Disbursement System (COD) Technical Reference*.

Message Class	Description
CRIBnnOP	Responses sent from COD System to school to update the Informed Borrower tag associated to a student for each loan origination record on COD's file.
COMRECOP	Responses containing data from any or multiple programs for any or multiple award years sent from COD System.
COMRECIN	Common Record Documents containing data from any or multiple programs for any or multiple award years sent from school to COD System.
CRAAnnOP	Responses sent from COD System to school for data received in the CRAAnnIN message class.
CRAAnnIN	Common Record Documents containing data from any or multiple programs for the specific Award Year sent from school to COD System.
CRPGnnOP	Responses sent from COD System to school for Pell Grant data for award year received in the CRPGnnIN message class.
CRPGnnIN	Common Record Documents containing Pell Grant data for specific award year sent from school to COD System.
CRDLnnOP	Responses sent from COD System to school for Direct Loan data for award year received in the CRDLnnIN message class.
CRDLnnIN	Common Record Documents containing Direct Loan data for specific award year sent from school to COD System.
CRAGnnOP	Responses sent from COD System to school for ACG data for award year received in the CRAGnnIN message class.
CRAGnnIN	Common Record Documents containing ACG data for specific award year sent from school to COD System.

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Message Class	Description
CRSGnnOP	Responses sent from COD System to school for National SMART Grant data for award year received in the CRSGnnIN message class.
CRSGnnIN	Common Record Documents containing National SMART Grant data for specific award year sent from school to COD System.
CRRCnnOP	Receipts sent from COD System to school for the incoming message classes CRAAnnIN, CRPGnnIN, CRAGnnIN, CRSGnnIN, or CRTHnnIN.
CRBNnnOP	Booking Notification
CRCOnnOP	Credit Decision Override (retired beginning with the 2015-2016 Aid Year).
CRNDnnOP	Negative Disbursement
CRPSnnOP	Payment to Servicing
CRPNnnOP	MPN Response
CRWBnnOP	Responses for activity performed on the COD website. Data is only imported into COD Staging tables
CRSPnnOP	DL PLUS Application Acknowledgement. Data is only imported into COD Staging tables.
CRSUnnOP	Subsidized Usage System Generated Response. Sent for students whose Subsidized Usage Limit Applies flag = Y. Schools cannot opt-out of receiving these Subsidized Usage System Generated Responses.
CRECMYOP	Entrance Counseling.
PGASnnOP	Pell Electronic Statement of Account (ESOA)
PGMRnnOP	Pell Multiple Reporting Record (MRR)
PGRCnnOP	Pell Reconciliation Report
PGYRnnOP	Pell Year-to-date Record
AGASnnOP	ACG Electronic Statement of Account (ESOA)
AGMRnnOP	ACG Multiple Reporting Record (MRR)
AGRCnnOP	ACG Reconciliation Report
AGYRnnOP	ACG Year Year-to-date Record
SGASnnOP	National SMART Grant Electronic Statement of Account (ESOA)
SGMRnnOP	National SMART Grant Multiple Reporting Record (MRR)
SGRCnnOP	National SMART Grant Reconciliation Report
SGYRnnOP	National SMART Grant Year
DSDFnnOP	Import School Account Statement (Fixed-Length)
DSLFnnOP	Import School Account Statement (Fixed-Length)
PGRQnnIN	Pell Data Request file

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Message Class	Description
AGRQnnIN	ACG Data Request file
SGRQnnIN	SMART Data Request file
CROFnnOP	Identifies a clean-up of Direct Loan records that COD identifies as having the wrong *interest rate or amount* and/or *interest rebate or amount*.
CRCSnnOP	Credit Status Response File indicates whether the borrower has met federally prescribed PLUS credit requirements.
PGLEnnOP	Pell Grant Lifetime Eligibility Used
PGSMnnOP	Pell Grant School Account Statement (Monthly Disbursement Level Detail)
PGSYnnOP	Pell Grant School Account Statement (Year-to-Date Disbursement Level Detail)
PGSAnnOP	Pell Grant School Account Statement (Year-to-Date Award Level Disbursement Detail)
PSOMnnOP	Pell Grant School Account Statement Disbursement Detail on Demand (Month-to-Date)
PSOYnnOP	Pell Grant School Account Statement Disbursement Detail on Demand (Year-to-Date)
PSORnnOP	Pell Grant School Account Statement Disbursement Detail on Demand (Date Range)
CRCBMYIN	Campus Based Record Documents containing data from any or multiple programs for any or multiple award years sent from school to COD System.
CRCBMYOP	Responses containing data from any or multiple programs for any or multiple award years sent from COD System.
CRCBnnIN	Campus Based Record Documents containing data from any or multiple programs for the specific Award Year send from school to COD System.
CRCBnnOP	Responses containing data from any or multiple programs for the specific Award Year sent from the COD System to school.

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47

Using Forms Engine

Using the Components of Forms Engine

The Forms Engine consists of several components. This section discusses how to:

- Use the application designer.
- Create and modify forms.
- Use the form image text repository.
- Using form image text.
- Upload form image text.
- Review form groups.
- Use output destination formats.
- Specify font names.
- Using PostScript fonts.
- Use the Inquire On Form Data page.

Pages Used with the Forms Engine Components

Page Name	Definition Name	Navigation	Usage
Form Editor	FORM_EDITOR	**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **Form Editor**, and then **Form Editor**	Create and modify forms.
Form Image Text Viewer	FE_IMAGE_TEXT	**Set Up SACR**, and then **Common Definition**, and then **Forms Engine**, and then **Set Up**, and then **Form Image Text**, and then **Form Image Text Viewer**	Update **Description** and **Cache From On Printer** fields.
Upload EPS Image File	FE_UPIMG_RUNCTL	**Set Up SACR**, and then **Common Definition**, and then **Forms Engine**, and then **Process**, and then **Upload EPS Image File**, and then **Upload EPS Image File**	Modify an image that you are rendered on a page by making a new or modified file in encapsulated Postscript (EPS) format.

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Page Name	Definition Name	Navigation	Usage
Form Groups	FORM_GROUP_TABLE	**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **Form Groups**, and then **Form Groups**	Use to tie a list of forms together.
Output Destination Formats	FE_OUTDESTFMT	**Set Up SACR**, and then **Common Definition**, and then **Forms Engine**, and then **Set Up**, and then **Out Dest Formats**, and then **Output Destination Formats**	View parameters for various output formats usable by programs that use the Forms Engine.
Font Names	FONT_NAME_TABLE	**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **Font Names**, and then **Font Names**	Lists all PostScript font names that you can specify within Form Editor.
PostScript Fonts	POSTSCRIPT_FONTS	**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **PostScript Fonts**, and then **PostScript Fonts**	View a list of translations using font names as specified in the Application Designer and translate to a PostScript font name.

Using the Application Designer

The Application Designer is not part of the Forms Engine. However, page layouts defined within the Application Designer can be imported into the Form Editor. You can make all of your changes to a form using Application Designer. If you use Application Designer to make changes, you do not need to make changes in Form Editor.

Creating and Modifying Forms

You can create or modify forms using the Form Editor either by importing a page layout from the Application Designer or by manually adding objects to the page definition. If you import a page layout from the Application Designer, the entire contents of the form definition are replaced by the imported page definition.

Access the Form Editor page (**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **Form Editor**, and then **Form Editor**).

Select **Set Page Device** to force the form to start on a new piece of paper. This is important when you are duplex printing (printing on both sides of the paper). If you do not select **Set Page Device,** a new form might print on the backside of a piece of paper.

You can add types of objects to forms such as Box, Data Field, Image, Line, Long Text, and Text. You can set attributes for each of these objects such as color, font, position, length, style, scale, spacing, justification, line thickness, dashes, image ID, and literal text. Not all attributes

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apply to all form child objects. You can specify to have sample text values appear in data fields when you preview the form.

To preview the form that you are editing, click the **Preview** link. This saves any unsaved changes, generates the PostScript print data stream, and sends the data to your browser. If your browser is configured to display this type of data, it displays the image of the form. If your browser is not configured to display this type of data, you can save the data to a disk directory. If you save the data to a disk directory and give it a file name, give it a (.ps) extension indicating that it is a PostScript file. Copy this file to a postscript printer. The page image renders graphically to that printer.

If you want to view the PostScript preview page image on your browser, click the **Get PostScript Viewer** link on the Form Editor page. The system displays a website where you can obtain a PostScript View program.

Using the Form Image Text Repository

Access the Form Image Text Viewer page (**Set Up SACR**, and then **Common Definition**, and then **Forms Engine**, and then **Set Up**, and then **Form Image Text**, and then **Form Image Text Viewer**).

The form image text is the actual PostScript text that is sent to the PostScript printer. To access the Form Image Text page, select **Design Student Administration**, and then **Forms Engine**, and then **Setup**, and then **Form Image Text**.

The only fields that you can update on the setup page are **Description** and **Cache Form On Printer. Cache Form On Printer** indicates whether the form is sent to the printer only once at the beginning of the print run or each time that the image is needed.

When you save a form layout in the Form Editor, it generates two corresponding entries in the Form Image Text table. The entry that starts with FEP followed by the form name is the static page layout. It is automatically set to cache on the printer. The other entry is the one that starts with FER followed by the form name. It is the runtime portion of the page and is sent each time that the page is printed. The runtime portion combines the page layout with images and wrapped text.

Uploading Form Image Text

To modify an image that is being rendered on a page, you must create a new or modified form image text file in encapsulated PostScript (EPS) format and upload it to an FTP site that you choose. You can then run the process to upload this text into the Form Image Text repository.

Access the Upload EPS Image File page (**Set Up SACR**, and then **Common Definition**, and then **Forms Engine**, and then **Process**, and then **Upload EPS Image File**).

Follow these steps to upload form image text.

1. Create a run control record.

   The URL is the name of the FTP domain to which you had previously uploaded the EPS file. If you uploaded it to the FTP server called MYFTPSITE, then you would enter MYFTPSITE into this field.

2. Enter the ID and password that you used to log on to the FTP site.
3. Retype the password in the **Confirm Password** field.

   The unique system file name should be a file name in 8.3-format without any blank spaces.

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> **Note**
>
> Do not enter path information. For example, MYLOGO.EPS is used for the MYLOGO form image text file. The remote file name is the path and name of the file that you specified when you uploaded it to your FTP site. The form image name is the name that Oracle uses as the key to the Form Image Text repository. Our example is MYLOGO.

4. Submit the process.
5. Access the Form Image Text page after the process finishes successfully. Enter a description for the image and select the **Cache Form On Printer** check box.

To create or modify form image text, you can create or modify the corresponding EPS file in the data directory of **ps_home.** For example, to create a graphic image called MYLOGO, copy the FAPSULGO.EPS file from the data directory to a file called MYLOGO.EPS. Use a simple text editor to edit it and change every occurrence of FAPSULGO with MYLOGO. You can modify the contents of the image text using a simple text editor and enter PostScript command text to construct an image.

An alternative technique for creating an EPS file for your image is to use some other program to generate the PostScript file. Some JPG files convert to EPS files that are too large to cache on the printer. You have to clear the **Cache Form On Printer** check box if your image is converted from a JPG file.

Reviewing Form Groups

A form group ties a list of forms together. The **Form Group Relative Sequence** field indicates the relative order for form groups to be rendered when more than one form group is output into a single print stream. The forms are tied to the form groups within an application program. Because of this, you should not modify these settings unless you are customizing a program.

Access the Form Groups page (**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **Form Groups**).

Using Output Destination Formats

Access the Output Destination Formats page (**Set Up SACR**, and then **Common Definition**, and then **Forms Engine**, and then **Set Up**, and then **Out Dest Formats**, and then **Output Destination Formats**).

This page specifies parameters for various output formats usable by programs, which in turn use the Forms Engine. For example, a program looks at the **Print Script** field to determine the name of a command script for printing. In the case of the PostScript output destination format, the print script PSPRINTFILE.CMD requires two arguments: the printer name and the file name.

Specifying Font Names

Access the Font Names page (**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **Font Names**, and then **Font Names**).

This page contains the list of all PostScript font names that you can specify within the Form Editor.

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Using PostScript Fonts

Access the PostScript Fonts page (**Set Up SACR**, and then **Common Definitions**, and then **Forms Engine**, and then **Set Up**, and then **PostScript Fonts**, and then **PostScript Fonts**).

This page displays a list of translations that uses a font name as specified in the Application Designer and translates it into a PostScript font name. You must install the font names specified on all of the PostScript printers at your installation.

Using the Inquire On Form Data Page

This page is normally hidden. You should restrict access to this page. It enables you to view any page printed by the Forms Engine and retained in the Form Data tables. Functions that refer to this data have pages and views that restrict the content to data relating to just that function. Use this page to debug problems.

Purging Form Data

To purge form data, you must first write to the Form Data tables and assign an expiration date for every page printed with the Forms Engine. Schedule a daily purge job to run the process to purge expired pages. To determine whether such a job exists, use your query tool to issue this query:

```
SELECT

*

FROM PSPRCSRQST

WHERE PRCSNAME = 'FE_FORM_PUR'

AND RUNSTATUS = 5
```

If no such process is scheduled to run, you must schedule it. Use the following steps to schedule a process.

1. Select **Design Student Administration**, and then **Forms Engine**, and then **Process**, and then **Form Data Purge.**
2. Create a run control.
3. Click the **Run** button.
4. Set the server name.
5. Set the **Recurrence** value to a daily purge schedule. If you do not have a recurrence, create a new one by selecting **PeopleTools**, and then **Process Scheduler Manager**, and then **Use**, and then **Recurrence Definitions** to create a new one.
6. Click OK.

Modifying a Form

You can modify a form in two ways. You should use the Application Designer. You can also edit the form with the Form Editor. If you modify the form by modifying the related page in the Application Designer (AD), click the **Import Page** button to import the modified page to the Form Editor.

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In the AD, page fields are not tied to record fields, and the page size matches the paper size in units of ENs. 72 ENs are in an inch. If you want to lay out a page in landscape format, you must change the page size so that the width is larger than the length. An 8 ½ by 11 inch piece of paper in portrait layout has the page size of 612 wide by 792 tall. To view or set this, access page properties and select the Use tab.

Currently, no recurring fields are permitted by the Forms Engine. Instead, each field on the page must have a unique name. View or set the PAGEFIELDNAME in the field properties and select the General tab. To see all of the PAGEFIELDNAMEs on a page, select the Order tab in AD for the page. You can rearrange, hide, or delete page fields. However, you cannot move fields to a different page or add new fields without changing the application program.

Adding Data to the Form Data Tables

To change the application program, you need to understand the nature of the various tables that store the form data. A computer programmer typically performs the following application program steps.

1. Obtain the next available FORM_PROC_INST by incrementing the field LAST_FORM_PROCINST in table PS_INSTALLATION_FA.
2. Insert one row into the PS_FORM_INSTANCES table corresponding to a single batch of output to be collated into one output stream.
3. Insert multiple rows into the PS_FORM_COLLATEGRP table, one per unique value of the FORM_GROUP_SEQ field.

   This is the description of the FORM_GROUP_SEQ field from its property in AD: *Form Group Sequence enables the sequencing of form groups within a FORM_PROC_INST. Each time a group of forms begins to print, this value is incremented and stays the same within that form group. If the same form group prints again, it is incremented again, so that it is not the same value if the same form group prints twice.*
4. Insert multiple rows into the PS_FORM_DATA table, one per data value.

   If the length of the data value exceeds 40 characters, you must also insert a related row into one of these tables: PS_FORM_DATA_C128, PS_FORM_DATA_C254, or PS_FORM_DATA_LONG. Set the value of the FORM_FIELD_LTYPE accordingly. Set the appropriate value for the FORM_GROUP_SUB_SEQ field. This is the description of that field from its property in AD: *Form Group Sub Sequence is a sequence number within a form group, one per form. When a new form group begins to print, this sequence number starts back at one.*

Setting Up Images

An image must exist in the Form Image Text table. You can use a Adobe PostScript rendering utility to generate a related bitmap or JPG file. Some examples of utilities that you can use are Ghostscript® or Adobe® Distiller.

This section discusses how to:

- Set up a background image.
- Set up a foreground image.

See ghostscript.com.

See adobe.com.

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Setting Up a Background Image

If you want to use Application Designer to modify the background image, you must create a modified style sheet and set the background image there. Refer to the *PeopleSoft Application Designer Developer's Guide.*

If you want to use the Form Editor to modify the background image, enter the image name in the **Image** field located to the right of the **Background Color** group box on the Form Editor page. The name that you enter here must be one of the names in the Form Image Text table.

Setting Up a Foreground Image

If you want to use Application Designer to add, modify, or create a foreground image, you must first create an image object, which you subsequently place on your page. Follow these steps if you want to use the Form Editor to modify or create a foreground image.

1. Insert a row into the list of form field objects.
2. Set form field type to *Image.*
3. Click the **Edit Field Attributes** link.
4. Set the image name, position, and scaling factor.
5. Click **OK.**

Changing a Logo

You can convert an image (for example, the Financial Aid PeopleSoft Univ Logo FAPSULGO) to encapsulated PostScript (eps) format suitable for use by the Forms Engine. To upload your image in eps format, you must first convert your logo from jpeg format to eps format. You must also convert your jpeg to gif format to view it in Application Designer. You must use the same naming convention for all three formats. The only change to the file name is the format extension (for example, Univ_Logo.jpg/Univ_Logo.eps/Univ_Logo.gif).

> **Note**
>
> If you are converting an image other than FAPSULGO, use that name in place of FAPSULGO.

You may want to consult your technical support group before implementing this procedure.

To change FAPSULGO:

Phase 1 – Converting the Application Designer Image to EPS Format

Perform the following 26 steps before proceeding with Phase 2.

1. Install Microsoft Photo Editor, GhostScript (http://www.ghostscript.com) and GsView, and JPEG2PS Utility (http://umn.dl.sourceforge.net/sourceforge/gnuwin32/jpeg2ps-1.9-bin.zip).
2. In Application Designer, open image FAPSULGO.
   - To add a new image:

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When prompted to select the image, select the gif. (for example, FAPSULGO.gif). The system displays the message, *Image format cannot be displayed in Windows. Do you want to import an alternate image?*

Click **Yes** and then select the .jpg (for example, FAPSULGO.jpg).

Right click and select image properties.

Enter a description. On the Use tab, omit the Image URL.

Click **OK** and save.

- To export an existing image:

  Click **File, Export Image.**

  Save it to a temporary location (for example, c:\temp\FAPSULGO.GIF) in GIF format.

- Close Application Designer.

3. Use Microsoft Photo Editor to convert the GIF to JPG format. Double-click the GIF file in Windows Explorer to invoke Photo Editor and open this file. Select **File, Save As** and select Jpeg format. Use the **MORE** button to reduce the size of the jpg file. Alternatively, you can override the scaling factor in step 13 to avoid losing image resolution.
4. Reopen the jpg file in Photo Editor to confirm that you like the way it looks in jpg format and then close Photo Editor.
5. If you are using the jpeg2ps utility, issue the command jpeg2ps FAPSULGO jpg > FAPSULGO eps.
6. Edit FAPSULGO.eps in Notepad.
7. Save the file as FAPSULGO.ps. Note. It is '.ps', not '.eps'.
8. Remove the comments at the start of the file that start with '%'.
9. Remove the language level test and the 'save' line.
10. At this point, all of the lines prior to the /RawData line have been deleted. The first line of the file now starts with /RawData.
11. Remove the 'showpage' line.
12. Remove the 'restore' line.
13. Change the 'scale' line to specify the width (65) and height (54) of the image (for example, 65 54 scale). The width and height can be seen in the image attributes three lines down. You can override the scaling factors here to resize your image without losing resolution.
14. Change the 'translate' to locate the image on the page. A page of 8.5 by 11 inches would have the dimensions in Ens' of 612 by 792 (multiply inches by 72). For example, to place the image 1/2 inch from the top and 1/2 inch from the left, change the translate line to 36 702 translate. The 702 = 792 – 36 – 54 (image height).
15. Insert this comment line after the 'scale' line: % /BBox [0 0 1 1] def.
16. Although this file does not need a /BBox statement, the Form Editor looks for a /BBox statement when it is importing a page's image.
17. Add a 'showpage' line at the end of the file.
18. File FAPSULGO.ps.
19. Display FAPSULGO.ps using Ghostview. Verify that this looks like what you want.
20. Print FAPSULGO.ps by copying it to your printer from a command line: copy FAPSULGO.ps\\prtserver\printername.
21. Confirm that the output looks good.

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22. Using Notepad, edit FAPSULGO.ps. Save it as FAPSULGO.eps (note it is '.eps', not '.ps').
23. Remove the 'showpage' at the end of the file.
24. Comment out the scale and translate lines near the top of the file by inserting a '%' at the front of each of those lines.
25. Add a comment at the very top of the file starting with a '%' describing this image. for example, % PeopleSoft Logo Icon.
26. File FAPSULGO.eps.

Phase 2 – Uploading and Editing Form Image Text

Perform steps 1 through 6 before proceeding with Phase 3.

1. Upload FAPSULGO.eps into the form image text FAPSULGO:
   - Select **Design Student Administration**, and then **Forms Engine**, and then **Process**, and then **Upload EPS Image File.**
   - URL: ftp.myserver.com
   - File Transfer ID: ftpid
   - Operator Password: ftppw
   - Unique System Filename: FAPSULGO.eps
   - Remote File Name: FAPSULGO.eps
   - Form Image Name: FAPSULGO
   - Submit
2. Edit the eps image file settings. For example, select **Design Student Administration**, and then **Forms Engine**, and then **Setup**, and then **Form Image Text.**
3. Open FAPSULGO.
4. For the description, enter the description of the image. For example: PeopleSoft Logo Icon.
5. Do not enable the **Cache Form On Printer** check box.
6. Save.

Phase 3 – Using Application Designer to Establish Field Properties and Create a New Image

Perform the following 17 steps.

1. Open Application Designer.
2. Open the page FA_AWD_NOTIF_LTR1 in Application Designer.
   - In the page field properties, change the existing image to the image that you just created.
   - In the Image/Format Size section, set the width and the height. See Step 13 in Phase 1 for values.
   - Click **OK** and save your changes.
3. Right-click the image on the page.
4. Select **Page Field Properties.**
5. Select the image ID FAPSULGO.
6. Select the 'Size' option on the image.

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7. Set the width to 65 and the height to 54. Refer to Step 13 in Phase 1.
8. Click **OK.**
9. The image on the page in Application Designer should now show the new logo.
10. Save the page.
11. Click **OK** to all the prompts for *Warning: Page field with label "not related to database field.* You can hold down the **Enter** key and let it auto-repeat the enter.
12. Close Application Designer.
13. Access Form Editor. Select **Design Student Administration**, and then **Forms Engine**, and then **Setup**, and then **Form Editor.**
14. Open the form FA_AWD_NOTIF_LTR1.
15. Click the **Import Page** button.
16. Click the **Preview** link. This automatically saves the form with the newly imported page values.
17. If the icon looks good here, you are ready to test.

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48

Using Financial Aid Web Services

Understanding Financial Aid Web Services

Technical developers, consultants and, implementers should use this document to learn about the technologies used by the web service and to determine the scope of data that the web service can exchange between a self service user interface (that the academic institution may build) and the Campus Solutions system. Business and functional analysts should use this document to understand how the web services function.

This topic is intended for users who are familiar with:

- A tool or technology to build and deploy the user interface.
- PeopleCode.
- Web services concepts, mainly XML, SOAP, and WSDL.
- PeopleSoft Integration Broker.
- Campus Community ‘Entity Registry’ functionality.
- Campus Solutions Financial Aid functionality.

Financial Aid Web Service can be used by end user devices (such as a mobile phone or a tablet), enterprise applications or any other third party software that can interface through standards based means.

Financial Aid Web Service can be used by:

- Oracle presentation technologies (such as PORTAL, Application Development Framework [or ADF], and PeopleSoft components and pages).
- Oracle Middleware, such as Enterprise Service Bus and BPEL.
- Oracle Applications, such as Enterprise, EnterpriseOne, and E-Business Suite.
- Third-party presentation technologies.
- Third-party middleware and applications.

Overview

Institutions have different needs, requirements and preferences for interacting with their students during the financial aid process. It is essential that the interaction between the student and institution is convenient, simple to use, and powerful for both the institution and the student. The User interface (UI) through which a student interacts with the institution can vary. For many campus audiences the interface of choice could be a range of current generation handheld devices (smart phone, tablets, blackberry, etc). However, options like conventional web browser based access (such as Campus Solutions Self Service Financial Aid) need to also be supported. In order to facilitate this flexibility a new web service has been delivered to support the Self Service Financial Aid process regardless of the user interface technology deployed at an institution.

The Financial Aid Web Service offers access to the Campus Solutions Financial Aid information through service operations.

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Using the SFA_FINANCIAL_AID Web Service

The SFA_FINANCIAL_AID web service includes different service operations that allow an external user interface to access student financial aid information.

This section discusses:

- Entity Registry
- Description Language
- Service Operations
- Setting up the Web Service

Entity Registry

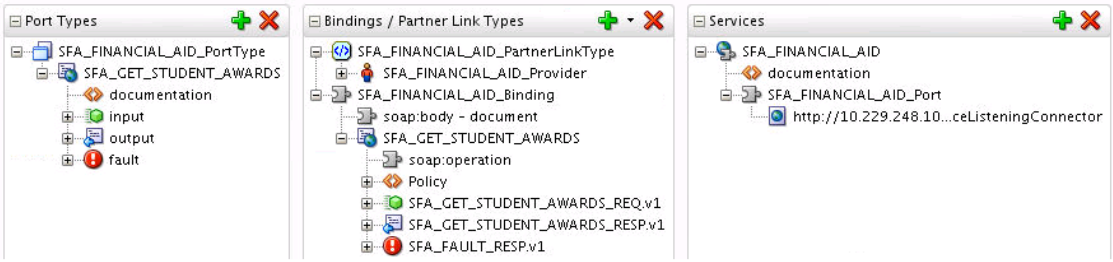
The SFA_FINANCIAL_AID web service uses the Entity Registry to provide the structure for returning student financial aid data. SFA_FINANCIAL_AID provides basic and work entities to represent Financial Aid student award data. These entities are not directly related to existing records.

Description Language

During setup, the system generates the Web Services Description Language (WSDL) for SFA_FINANCIAL_AID.

The following diagram lists the SFA_FINANCIAL_AID web service operations and their messages:

This example illustrates SFA_FINANCIAL_AID Web Service Operations and Messages.



Service Operations

The SFA_FINANCIAL_AID web service provides the following SOAP and REST services that enable you to access student Campus Solutions Financial Aid information:

Service	Service Operation	Description
SFA_FINANCIAL_AID	SFA_GET_STUDENT_AWARDS	SOAP Service. Allows the student to view award information for an Institution and Aid Year.

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Service	Service Operation	Description
SFA_FINANCIAL_AID_R	SFA_GET_STUDENT_AWARDS_R_POST	REST Service. Allows the student to view award information for an Institution and Aid Year.

The service operations use PeopleTools Integration Broker. Any user interface that is web-service enabled and complies with web service standards can access the service operations. The SFA_FINANCIAL_AID web service adheres to open web service standards that are currently supported in the latest release of PeopleTools. Before you develop your own user interface, it is recommended that you use a SOAP service tester to become familiar with how the web services process the student account data and user information. One way to use a service tester is to pass the input parameters to a service operation, and then view the service operation output.

Setting Up the SFA_FINANCIAL_AID Web Service

The PeopleTools Integration Broker applies to the SFA_FINANCIAL_AID web service and must be set up.

Review the following documentation as part of your Financial Aid Web Service implementation:

See *PeopleTools: Integration Broker Testing Utilities and Tools*.

See Campus Community Fundamentals: Setting Up the Service Tester.

Using SFA_FINANCIAL_AID Service Operations

This section discusses the service operations that are delivered with SFA_FINANCIAL_AID.

Using the SOAP Get Student Awards Service Operation

This section describes the SFA_FINANCIAL_AID SOAP service operation SFA_GET_STUDENT_AWARDS.

> **Note**
>
> There is no difference in the request/response messages for SOAP and REST. The information contained in this section is also true for REST.

SOAP Service Name

SFA_FINANCIAL_AID

Service Operation

SFA_GET_STUDENT_AWARDS

Summary

Allows the student to view award information for an Institution and Aid Year

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Description

The Get Student Awards request enables the user to retrieve student financial aid award details. This operation is designed to return full award data for only one Institution and Aid Year combination at a time. This data includes:

- Aid Year Totals
- Award (Item Type) Information
- Term Information
- Disbursement Information

Although only one year's full data is returned, the operation also retrieves a List of Values (LOV) of other Institution and Aid Year combinations where the student has award information available for viewing. The LOV allows the user to easily know which other combinations are available, which can then be used to submit a new request in order to see full award data for a different Institution/Aid Year.

The operation determines what award data to pull and how to organize it based on existing Campus Solutions Financial Aid Self Service setup options and security access.

See Configuration Considerations.

Users

This service can be consumed by schools and third-party providers to render custom user interface on a tablet, mobile or any other device.

Processing

This service operation:

- Accepts the input parameters: EmplID, Institution and Aid Year. The EmplID must match the operator ID.
- Verifies that the operator has financial aid award information available for viewing based on Financial Aid Self Service options and security access.
- Retrieves and organizes the data requested based on Financial Aid Self Service options and security access.

Output

The following explains the layout of the response message.

- STUDENT_AWARD_SUMMARY

  This section contains the highest level of data and summation by Institution & Aid Year.

- SFA_AWARD_PER

  This attribute shows which display option has been chosen: Aid Year or Award Period.

  If Award Period is chosen, there is a different STUDNT_AWARD_SUMMARY section for each existing award period for the student (Academic and Non-Standard). This option controls how the data is divided within the response.

- STUDENT_AWARD_DETAIL

  This section contains the next level of detail from STUDENT_AWARD_SUMMARY, which is the Award and Award Totals. There is one STUDENT_AWARD_DETAIL section for

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every Award (Item Type) that the student has for that specific Institution and Aid Year (and Award Period, if that display option is chosen).

- STUDENT_TERM_DETAIL

  This section contains the next level of detail from STUDENT_AWARD_DETAIL, which is the Term and Term Totals. There is one STUDENT_TERM_DETAIL section for every Term associated with the Award for that specific Institution and Aid Year (and Award Period, if that display option is chosen).

- STUDENT_DISB_DETAIL

  This section contains the next level of detail from STUDENT_TERM_DETAIL, which is the Disbursement Date & Totals. There is one STUDENT_DISB_DETAIL for every Disbursement ID within the associated Term for that specific Institution and Aid Year (and Award Period, if that display option is chosen).

  Data in the STUDENT_DISB_DETAIL section is only returned for Awards that have a status of Accepted, Partially Disbursed or Fully Disbursed (see SFA_AWARD_STATUS_LOVDescr attribute).

- LOV

  The List of Values (LOV) section returns ALL Institutions and Aid Years the student has access to based on their user security, self-service setup and other related setup options. This provides a valid listing of only those Institution/Aid Years that can have full award data returned by the service.

- VALUE

  This section contains the next level of detail from LOV and repeats for each Institution and Aid Year for which the student has Award data and required security.

Error Conditions

If the student has no award data and/or no security to the award data requested, the service operation returns the following message:

"'You have no financial aid awards available for viewing.'"

Entity Registry Details for SFA_GET_STUDENT_AWARDS

Entity	DB Record	Message
StudentAwardRequest (Request Entity)	SFA_STD_AWD_WRK	SFA_GET_STUDENT_AWARDS_REQ
StudentAwardSummary (Response Entity)	SFA_STD_AWDSWRK	SFA_GET_STUDENT_AWARDS_RESP
StudentAwardDetail	SFA_STD_AWDDWRK	
StudentAwardTerm	SFA_STD_TERMWRK	
StudentAwardDisbursement	SFA_STD_DISBWRK	

This is this SFA_FINANCIAL_AID Entity Hierarchy display:

This example illustrates the SFA_FINANCIAL_AID Entity Hierarchy.

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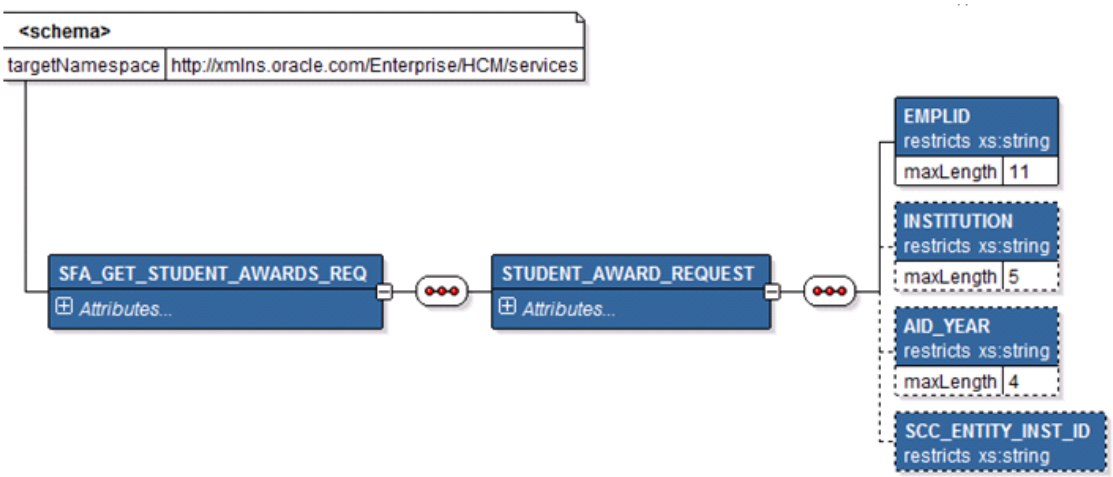
- SFA_GET_STUDENT_AWARDS_REQ
  - StudentAwardRequest (0,Unbounded)

- SFA_GET_STUDENT_AWARDS_RESP
  - StudentAwardSummary (0,Unbounded)
    - StudentAwardDetail (0,Unbounded)
      - StudentAwardTerm (0,Unbounded)
        - StudentAwardDisbursement (0,Unbounded)
  - StudentAwardLOV (0,Unbounded)
    - StudentAwardLOVValue (0,Unbounded)

Input Message: SFA_GET_STUDENT_AWD_REQ

The following diagram shows the input message structure that the SFA_GET_STUDENT_AWARDS_REQ service option receives from an application:

This example illustrates the SFA_GET_STUDENT_AWD_REQ Message Structure.



The following input parameters are required for an application to pass to the service operation:

Data	Description
EmplID (Employee ID)	Required. Defaults to operator's EmplID.
Institution	Optional
Aid Year	Optional

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The following is an example of the SFA_GET_STUDENT_AWARDS_REQ message that the SFA_GET_STUDENT_AWARDS service operation receives from the an application:

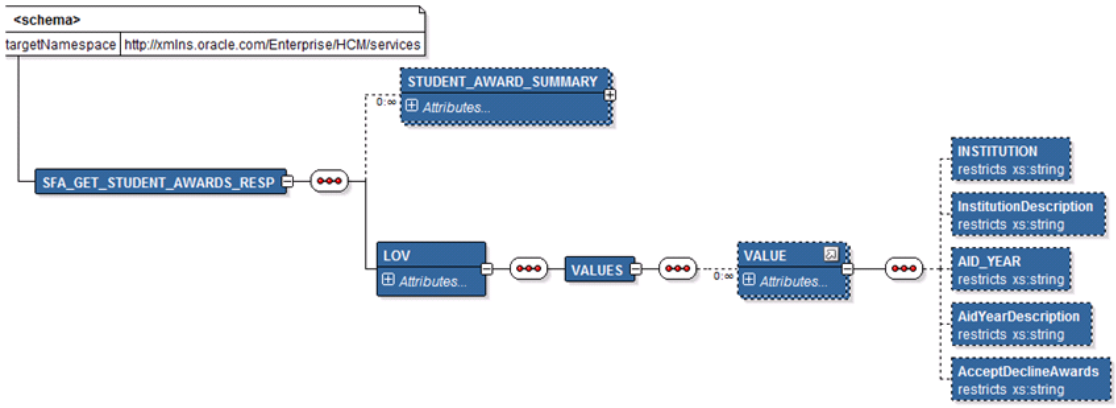
```
<?xml version="1.0"?>
<SFA_GET_STUDENT_AWARDS_REQ xmlns="http://xmlns.oracle.com/Enterprise/HCM/
services">
  <STUDENT_AWARD_REQUEST>
    <EMPLID>FAFUSE002</EMPLID>
    <INSTITUTION>PSUNV</INSTITUTION>
    <AID_YEAR>2013</AID_YEAR>
  </STUDENT_AWARD_REQUEST>
</SFA_GET_STUDENT_AWARDS_REQ>
```

Output Message: SFA_GET_STUDENT_AWD_RESP

When the Integration Broker receives the SFA_GET_STUDENT_AWD_REQ message, it responds with the SFA_GET_STUDENT_AWD_RESP message.

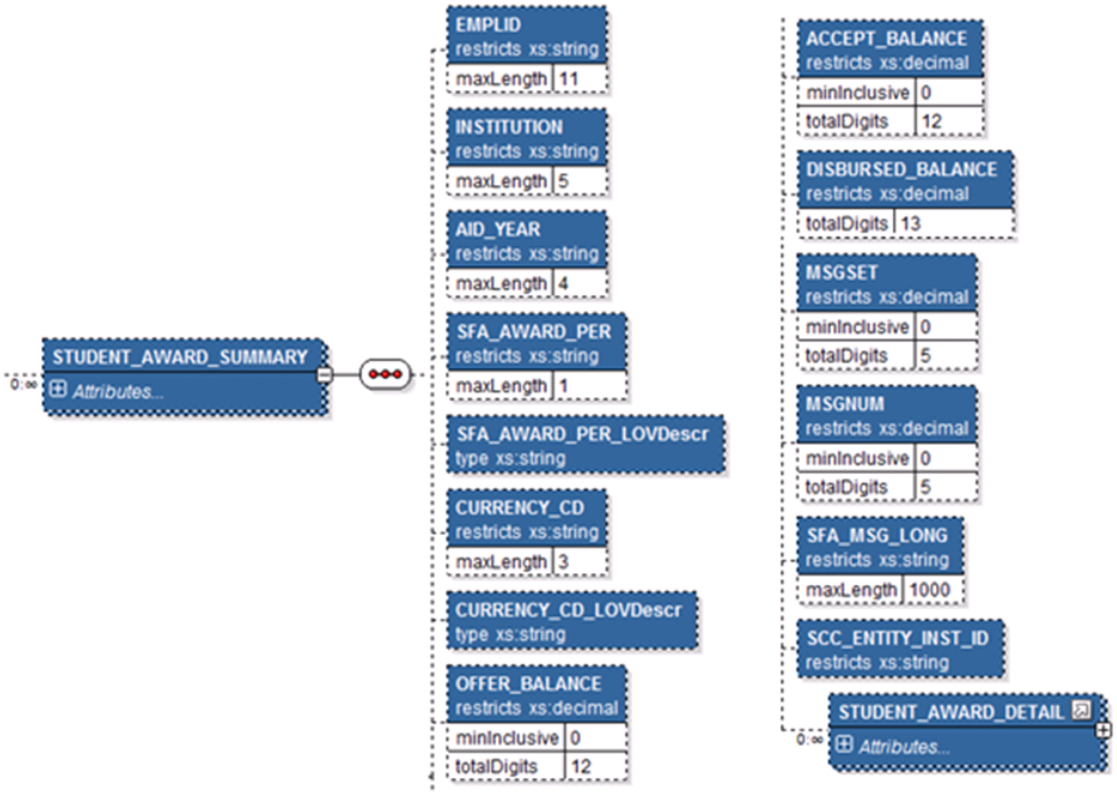
The following diagram shows the output message structure that the SFA_GET_STUDENT_AWARDS service operation passes to an application:

This example illustrates the SFA_GET_STUDENT_AWD_RESP List of Values Message Structure.

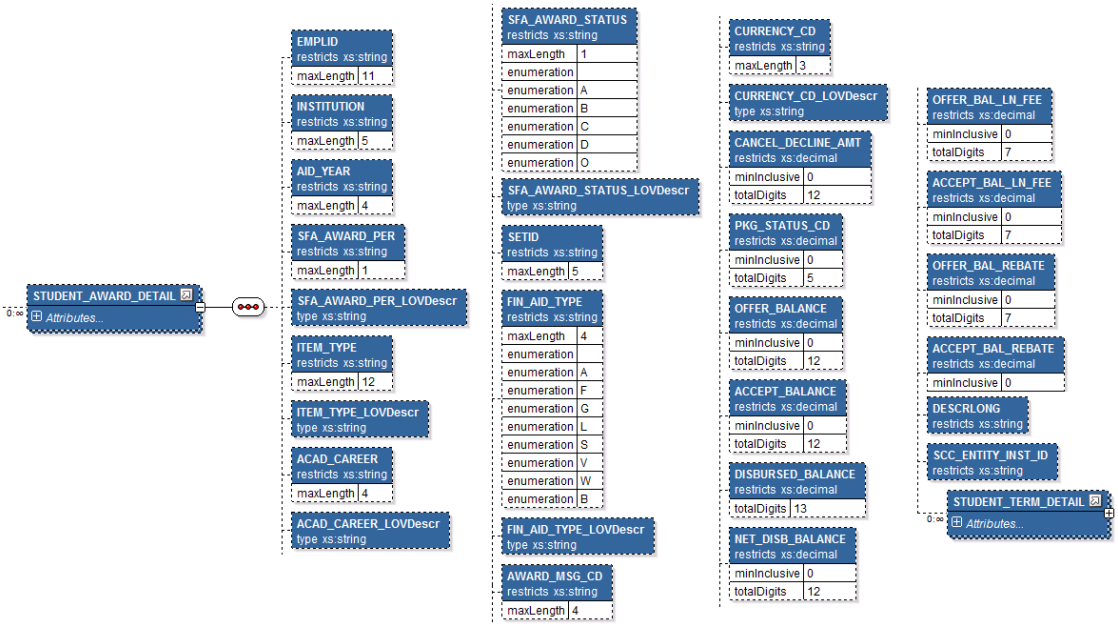


This example illustrates the SFA_GET_STUDENT_AWD_REQ Student Award Summary Message Structure.

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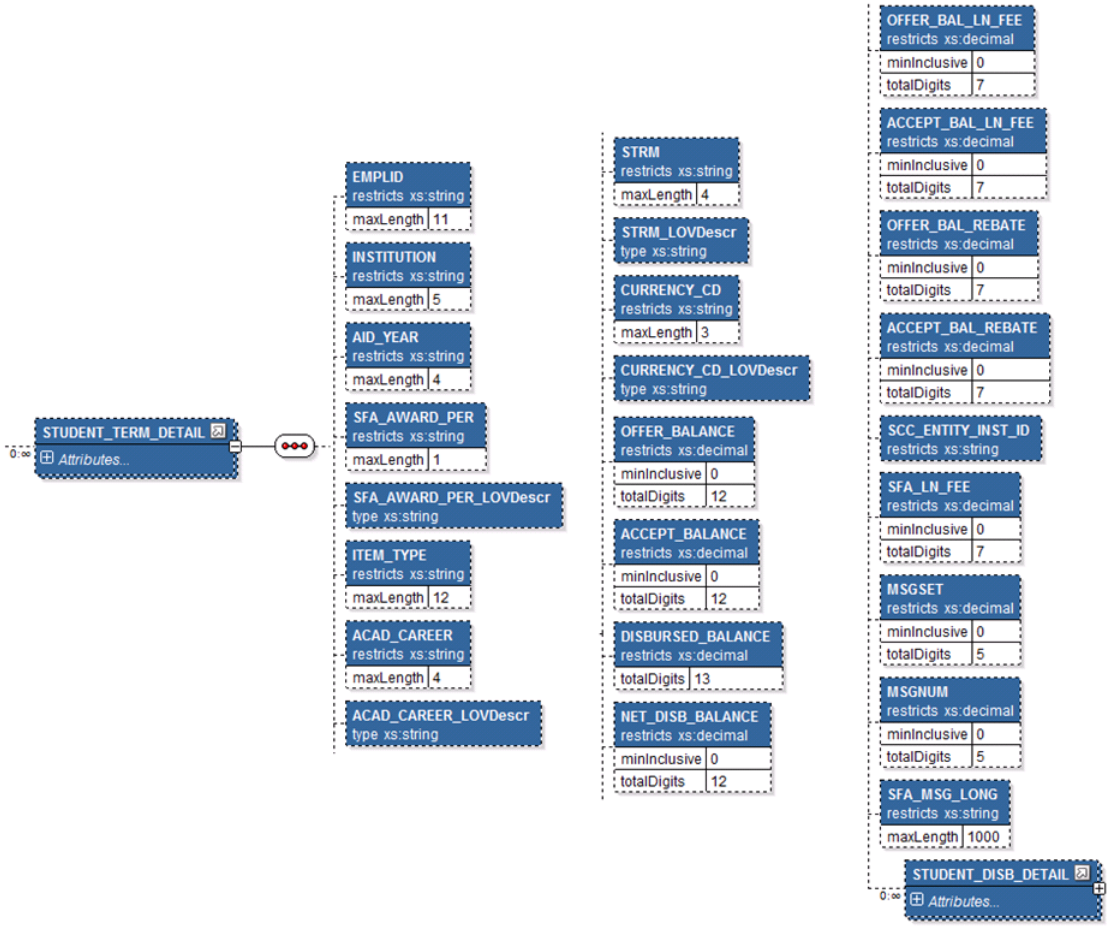


This example illustrates the SFA_GET_STUDENT_AWD_REQ Student Award Detail Message Structure.



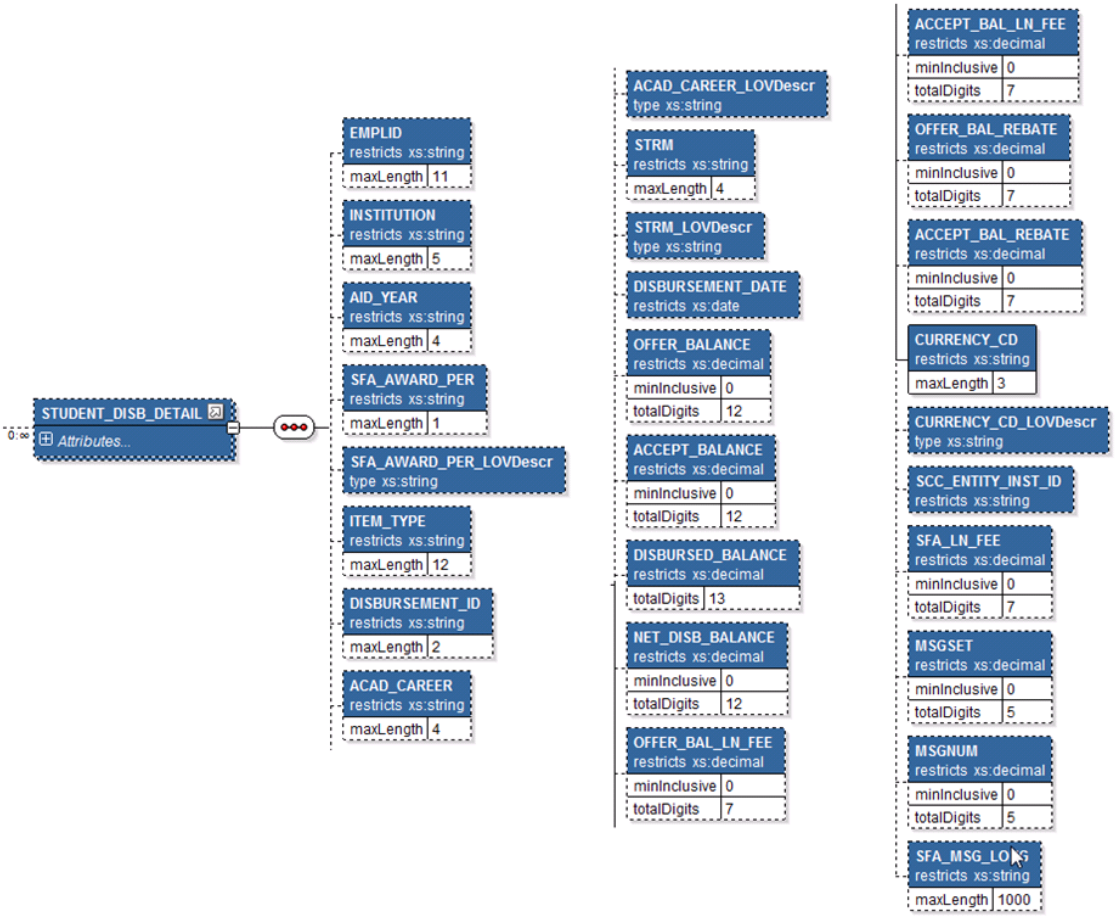
This example illustrates the SFA_GET_STUDENT_AWD_REQ Student Term Detail Message Structure.

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This example illustrates the SFA_GET_STUDENT_AWD_REQ Student Disbursement Detail Message Structure.

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The following is an example of the SFA_GET_STUDENT_AWARDS_RESP message that the SFA_GET_STUDENT_AWARDS service operation transmits to an application:

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    <SFA_AWARD_PER_LOVDescr>Academic Year</SFA_AWARD_PER_LOVDescr>
    <CURRENCY_CD>USD</CURRENCY_CD>
    <CURRENCY_CD_LOVDescr>US Dollar</CURRENCY_CD_LOVDescr>
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      <INSTITUTION>PSUNV</INSTITUTION>
      <AID_YEAR>2013</AID_YEAR>
      <SFA_AWARD_PER>A</SFA_AWARD_PER>
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        <ACCEPT_BAL_REBATE>0</ACCEPT_BAL_REBATE>
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time load, if your
         actual enrollment load changes your award will be adjusted
accordingly.</DESCRLONG>
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          <EMPLID>FAFUSE002</EMPLID>
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      </STUDENT_TERM_DETAIL>
    </STUDENT_AWARD_DETAIL>
```


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    <VALUES>
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        <AidYearDescription>2013-2014</AidYearDescription>
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      <VALUE>
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        <InstitutionDescription>PeopleSoft University</InstitutionDescription>
        <AID_YEAR>2013</AID_YEAR>
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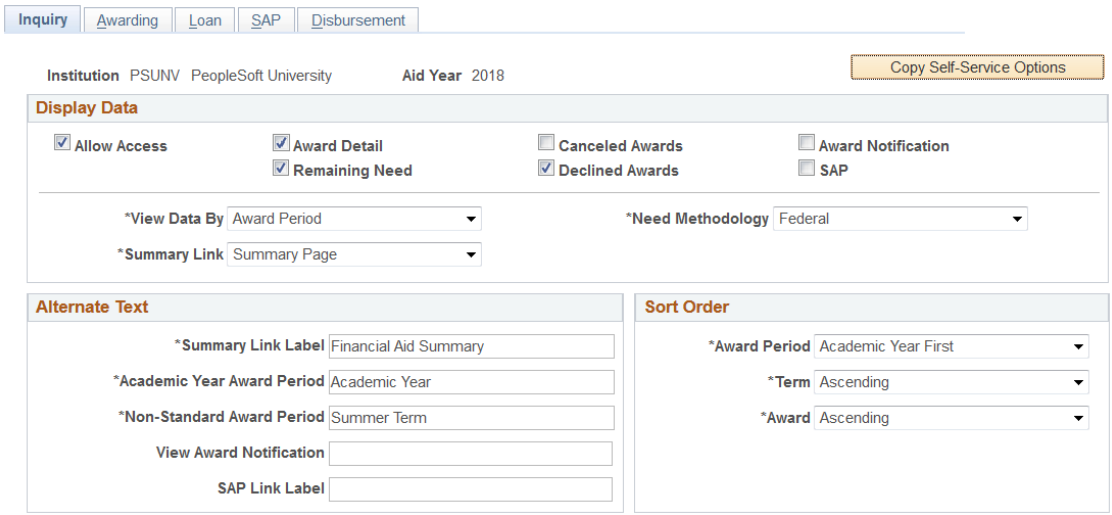
Configuration Considerations

The Get Student Awards service operation depends upon a number of existing Campus Solutions system configuration options. Many of the configuration options used to control which data and how that data is organized are the exact same options used to control existing Campus Solutions Financial Aid Self Service. Configuration considerations are at the follow places in the system:

- Self Service Inquiry Options
- Financial Aid Item Type setup
- Student Packaging Status Summary

Navigate to the Financial Aid Self Service Inquiry page (**Set Up SACR**, and then **Common Definitions**, and then **Self Service**, and then **Financial Aid**, and then **Self Service Options**, and then **Inquiry**).

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



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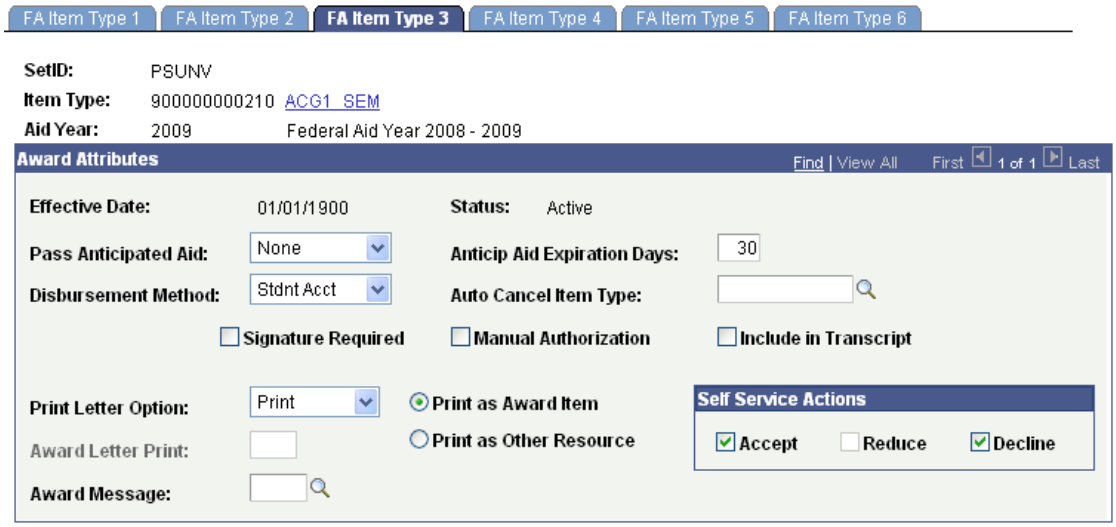
Field or Control	Description
Allow Access	This option must be selected in order for the response message to return data for this Institution and Aid Year.
Award Detail	This option must be selected in order for the response message to return award data for this Institution and Aid Year.
Cancelled Awards	If selected, the response message returns any award with a status of 'Cancelled' in the STUDENT_AWARD_DETAIL section. The response also retrieves any message contained within Message Catalog 14409/547. This is the same message displayed within Campus Solutions Financial Aid Self Service for Cancelled awards.
Declined Awards	If selected, the response message returns any award with a status of 'Declined' in the STUDENT_AWARD_DETAIL section. The response also retrieves any message contained within Message Catalog 14409/547. This is the same message displayed within Campus Solutions Financial Aid Self Service for Declined awards.
View Data By	This option controls how the data is organized within the response message. If 'Aid Year' is selected, there is only one STUDENT_AWARD_SUMMARY section within the response message. If 'Award Period' is selected, there can be multiple STUDENT_AWARD_SUMMARY sections within the response. This is based on how many award periods the student's awards are associated to. If the student has awards only for the Academic period, only one STUDENT_AWARD_SUMMARY section is returned. If the student has awards for both the Academic and Non-Standard periods, two STUDENT_AWARD_SUMMARY sections are returned.
Academic Year Award Period	If the View Data By option is set to 'Award Period', the value entered in this field is returned in the SFA_AWARD_PER_LOVDescr attribute for the Academic award period.
Non-Standard Award Period	If the View Data By option is set to 'Award Period', the value entered in this field is returned in the SFA_AWARD_PER_LOVDescr attribute for the Non-Standard award period.
Award Period	If the View Data By option is set to 'Award Period', this option controls the order in which award periods are returned (in the STUDENT_AWARD_SUMMARY section) when multiple award periods exist.

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Field or Control	Description
Term	If the View Data By option is set to 'Award Period', this option controls the order in which terms are returned (in the STUDENT_AWARD_TERM section) when multiple terms exist

Navigate to Financial Aid Item Type Self Service options (Set Up SACR > Product Related > Financial Aid > Financial Aid Item Types, FA Item Type 3 tab)

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



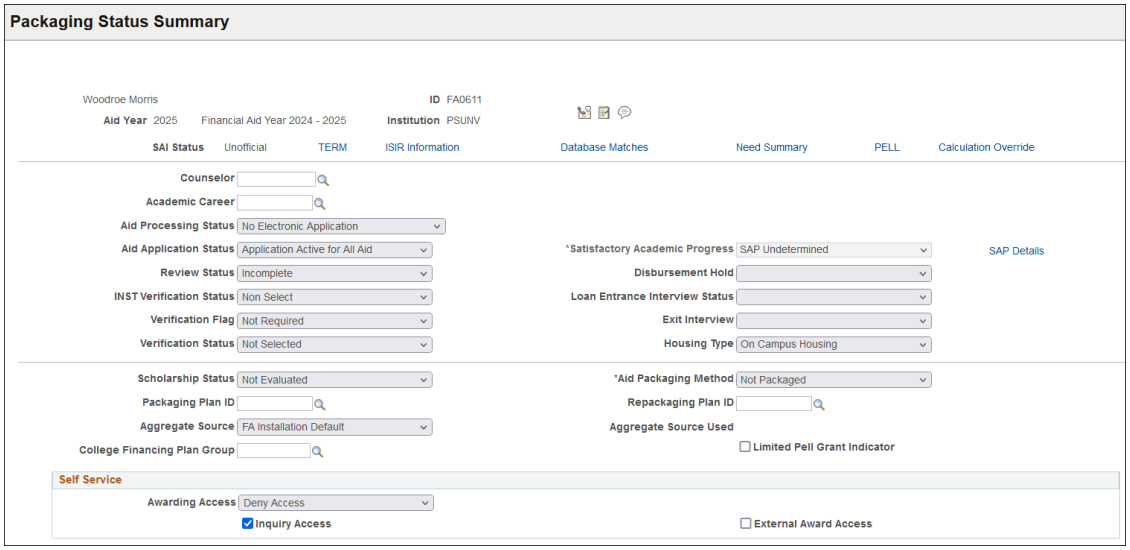
Field or Control	Description
Print Letter Option	Only Awards (Item Types) that have a Print Letter Option of 'Print' are returned as part of the response message. This mimics how Campus Solutions Financial Aid Self Service operates.

See Defining Financial Aid Item Types.

Navigate to the Packaging Status Summary page (Financial Aid, View Packaging Status Summary).

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

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Field or Control	Description
Award Access	This option controls what value is returned in the AcceptDeclineAwards attribute of the LOV section of the response message. For each Institution and Aid Year combination returned, this attribute displays if the student has access to Accept/Decline their awards in Campus Solutions Self Service.
Inquiry Access	This option must be selected in order for the response message to return award data for this Institution and Aid Year.

Post Installation Troubleshooting

This section discusses how to:

- Verify web service security settings.
- Publish the web services.

Verifying Web Service Security Settings

For the SFA_FINANCIAL_AID web service, the service operations are delivered with FULL ACCESS to the HCCPCS01000 – All Pages permission list.

To verify whether the HCCPCS01000 permission list is assigned to a service operation with FULL ACCESS:

1. Access the General page (**PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations**, and then **General**).
2. Click the Service Operation Security link to access the Web Service Access page.
3. On the Web Service Access page, verify whether the permission list has full access.

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Publishing the Web Services

To publish the SFA_FINANCIAL_AID (SFA_GET_STUDENT_AWARDS) web service, access the Provide Web Service page. Go to PeopleTools, Integration Broker, Web services, Provide Web Service.

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49

(CAN) Using Canadian Financial Aid Applications and Canadian Need Analysis

Understanding Using CNAS

CNAS application allows entry of full-time or part-time Canadian student loan applications. You invoke calculation routines from the application pages and can view the results online. Auditing is available for all fields on the application pages. The system stores calculation results in effective-dated tables.

Defining the CNAS File Load Parameters

This section discusses how to define data load parameters.

Page Used to Define the CNAS File Load Parameters

Page Name	Definition Name	Navigation	Usage
File Load Setup	CSL_CONTROL	**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **CSL File Load Control**, and then **File Load Setup**	Define the parameters of the file load.

Defining Data Load Parameters

Access the File Load Setup page (**Set Up SACR**, and then **Product Related**, and then **Financial Aid**, and then **File Management**, and then **CSL File Load Control**, and then **File Load Setup**).

Field or Control	Description
Input/Output file	Enter the file path and file name of the input/output file that you want to load.
Error file	Enter the file path and file name for the error file.
Name ID and **SIN** (social insurance number)	Select a check box to indicate which criteria to use in matching incoming student records to existing records in the database.

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Field or Control	Description
Record Add Level and **Record Suspend Level**	Indicates the admit level required to add a student record to the database or place it in suspense. The values are as follows: *0:* Load Everyone *1:* Recruits or Higher *2:* Inactive Admits or Higher *3:* Applicants or Higher *4:* Active Admits or Higher *5:* Accepted/Continuing Only Student records meeting criteria below the suspense admit level are not loaded from the OSAP file.
CSL Numeric Variable (Canada student loan numeric variable), **Prov Loan Numeric Variable** (province loan numeric variable), and **CSG Numeric Variable** (Canada study grant numeric variable)	Select a value. Variables enable the system to assign load data to numeric packaging variable fields. **Note:** Verify that the variable chosen is not already in use. This process overwrites any existing data in the chosen numeric packaging variable fields.

Loading and Viewing CNAS Data

This section discusses how to:

- Load CNAS data.
- View CNAS Load Results 1.
- View CNAS Load Results 2.

Pages Used to Load and View CNAS Data

Page Name	Definition Name	Navigation	Usage
Data Load	RUNCTL_OSAP	**Financial Aid**, and then **File Management**, and then **Canadian**, and then **Process Data Load**, and then **Data Load**	Load eligibility data from the provincial Student Services Bureau into the system.
Load Results 1	OSAP_RESULTS1	**Financial Aid**, and then **File Management**, and then **Canadian**, and then **View Load Results**, and then **Load Results 1**	View data load record layout results, in the format of the new or previous version, that are successfully loaded to your database.

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Page Name	Definition Name	Navigation	Usage
Load Results 2	OSAP_RESULTS2	**Financial Aid**, and then **File Management**, and then **Canadian**, and then **View Load Results**, and then **Load Results 2**	View new version data load record layout results successfully loaded to your database.

Loading CNAS Data

Access the Data Load page (**Financial Aid**, and then **File Management**, and then **Canadian**, and then **Process Data Load**, and then **Data Load**).

Field or Control	Description
Academic Institution	Select the institution to populate the load data.
Aid Year	Select to process the data load.

Click the **Run** button to run the process.

On the Process Scheduler Request page, select *New OSAP Data Load* (FAOSPLDN) to load files supported by the new record layout. If you select and run the *Old OSAP Data Load,* your process and results display in the format of the previous version.

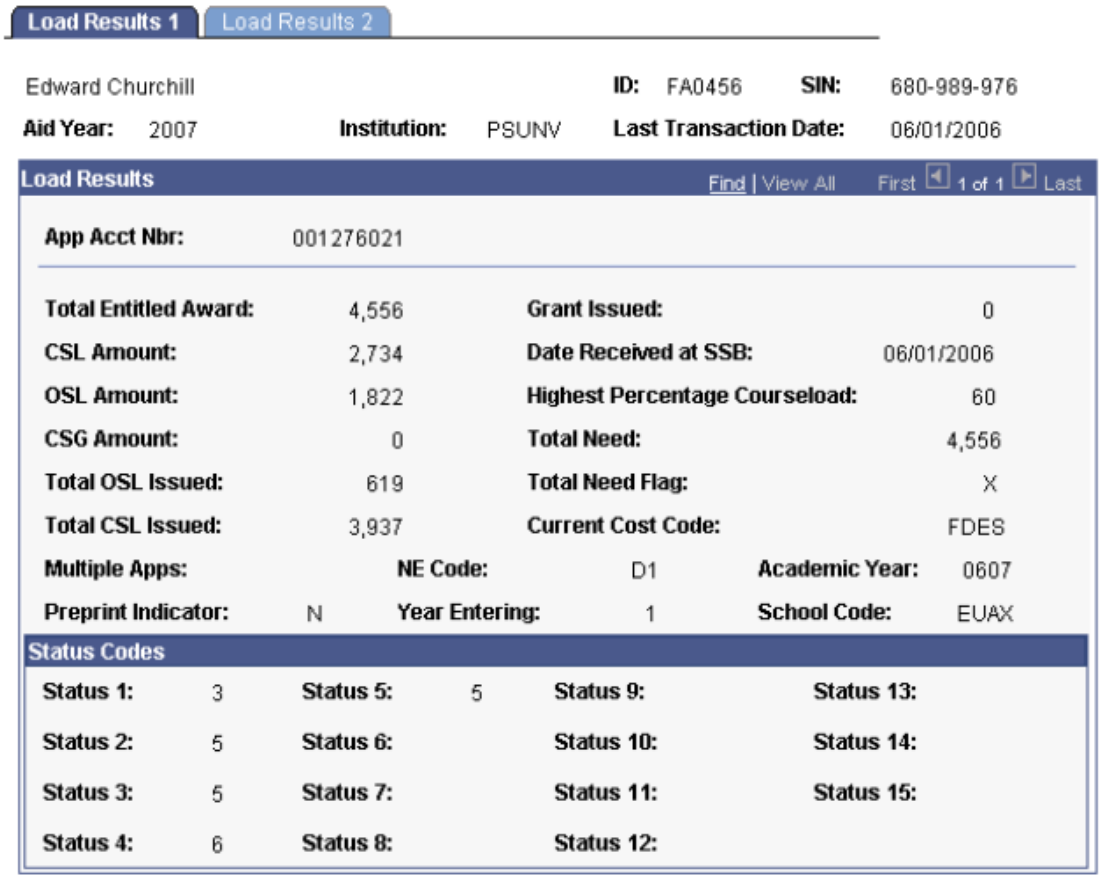
Viewing CNAS Load Results 1

The Load Results 1 page contains the data load results for either format of the record layout for applications received by the Ministry of Training, Colleges and Universities.

Access the Load Results 1 page (**Financial Aid**, and then **File Management**, and then **Canadian**, and then **View Load Results**, and then **Load Results 1**).

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

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The system displays the student name, **ID, SIN** (social insurance number), **Aid Year, Institution,** and **Last Transaction Date.**

Field or Control	Description
App Account Nbr (application account number)	The number assigned to the application. A student can have multiple application rows.
Total Entitled Award	Displays the student's total award amount.
CSL Amount (Canada student loan amount)	Displays the loan amount from CSL.
OSL Amount (Ontario student loan amount)	Displays the loan amount from OSL.
CSG Amount (Canada study grant amount)	Displays the grant amount from CSG.
Total OSL Issued (total Ontario student loan issued)	Displays the amount issued to the student from OSL.
Total CSL Issued (total Canada student loan issued)	Displays the amount issued to the student from CSL.
Grant Issued	Displays the grant amount issued.
Date Received at SSB (date received at student support branch)	Displays the date received at SSB.
Highest Percentage Courseload	Displays the course load percentage.
Total Need	Displays the amount of the student's total financial aid need.
Total Need Flag	Displays the total need flag.

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Field or Control	Description
Current Cost Code	Displays the current cost code. Cost code is based on the number of weeks of financial aid and the student's career, program, and year in school.
Multiple Apps (multiple applications)	Indicates multiple applications.
Preprint Indicator	Indicates preprint.
NE Code	Displays the NE code.
Year Entering	Displays the year that the student is entering the program. For example if the student is entering second year, this field displays a 2.
Academic Year	Displays the academic year.
School Code	Displays the school code.

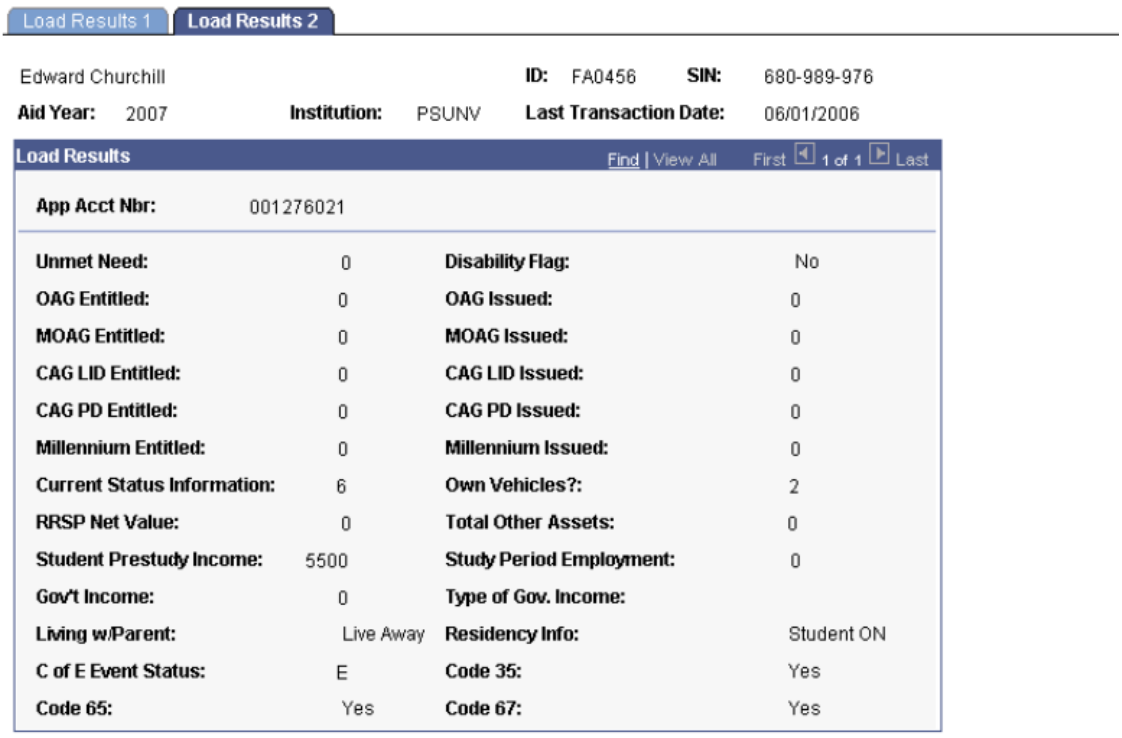
In the **Status Codes** group box, the system displays any applicable status codes.

Viewing CNAS Load Results 2

The Load Results 2 page contains the data load results using the new record layout for applications received by the Ministry of Training, Colleges and Universities.

Access the Load Results 2 page (**Financial Aid**, and then **File Management**, and then **Canadian**, and then **View Load Results**, and then **Load Results 2**).

This example illustrates the fields and controls on the Load Results 2 page.



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Managing CNAS Suspense

This section discusses how to:

- Review CNAS suspense.
- Process CNAS suspense.

Pages Used to Manage CNAS Suspense

Page Name	Definition Name	Navigation	Usage
Suspense Management	FA_OSAP_SUSP	**Financial Aid**, and then **File Management**, and then **Canadian**, and then **Manage Suspended Records**, and then **Suspense Management**	Manage the applications that did not to load during an incoming application process.
Suspense Maintenance	RUNCTL_SUSP	**Financial Aid**, and then **File Management**, and then **Canadian**, and then **Process Suspense Files**, and then **Suspense Maintenance**	Move records that have been marked as add, pending or delete on the Suspense Management page.

Reviewing CNAS Suspense

Access the Suspense Management page (**(Financial Aid**, and then **File Management**, and then **Canadian**, and then **Manage Suspended Records**, and then **Suspense Management**).

Field or Control	Description
Academic Institution	Indicates the institution for data that you want to maintain.
Aid Year	An awarding cycle with defined disbursement periods.
FA Student ID	Displays the student's unique identification.
Last Transaction Date	Displays the date of the last transaction.
Application Account Number	Displays the application account number.
Social Insurance Number	Displays the social insurance number.
Date of Birth	Displays the student's date of birth.
Student's Admit Level	Displays admission level. Values are: *0 - Student Not Found, 1 - Has Not Applied, 2 - Inactive, 3 - Applied/Pending, 4 - Admitted,* and *5 - Accepted/ Continuing.*

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Field or Control	Description
OSAP Suspend Reason (Ontario Student Assistance Program suspend reason)	Displays reason for suspense. Values are: *EmplID not matched, SIN not matched, Name not matched, EmplID/SIN not matched, EmplID/ Name not matched, SIN/Name not matched, EmplID/SIN/Name not matched,* and *Student not at load level.*
ID	Enter the student's unique identification.
Add to Results	Select to move the student's record from suspense to the load results table.
Pending	Select to keep the student's record in suspense. For example, if your institution only loads admitted students and you know that a student is not yet admitted, you would select **Pending** to keep the student in suspense.
Delete from Suspense	Select to move the student from suspense.

Processing CNAS Suspense

Access the Suspense Maintenance page (**Financial Aid**, and then **File Management**, and then **Canadian**, and then **Process Suspense Files**, and then **Suspense Maintenance**).

Field or Control	Description
Academic Institution	Select the institution for the suspense data you want to move.
Aid Year	Select the aid year for the suspense data you want to move.

Click the **Run** button to run the process.

For Financial Aid Year 2005-2006 and forward, two formats are available for the data load.

On the Process Scheduler Request page, select *New OSAP Suspense Processing* (FAOSPSPN) to process files supported by the new record layout. If you select and run the *Old OSAP Suspense Processing,* your process and results display in the previous format.

Adding an Application Source Code for Canadian Applications

This section discusses how to add an application source code.

Page Used to Add an Application Source Code

Page Name	Definition Name	Navigation	Usage
Add Institutional Application	INST_ADD	**Financial Aid**, and then **Canadian Application Data**, and then **Add Institutional Application**, and then **Add Institutional Application**	Add or view the application source code for a student's full-time or part-time Canadian application.

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Adding an Application Source Code

Access the Add Institutional Application page (**Financial Aid**, and then **Canadian Application Data**, and then **Add Institutional Application**, and then **Add Institutional Application**).

Field or Control	Description
Application Source Code	Select one or more of the options to associate this type of application with the student. The verification process uses the application source code. *8:* Profile *9:* Institutional Application *O:* FT Canada Student Loan (full time) *P:* PT Canada Student Loan (part time)

> **Note**
>
> Part-time applications must have an **Application Source Code** of *P* (part-time) for correct CNAS calculation.

Maintaining Full-Time Student Data

Different Canadian financial aid applications are available for full-time and part-time students. Use the Full-time Application component to enter and maintain data for full-time students.

This section lists common elements and discusses how to:

- Enter student personal information.
- Override institutional CNAS options.
- Enter student family status and residency information.
- Enter student study period information.
- Enter student financial data.
- Enter parent data.
- Enter spouse information.
- Enter signature and next of kin information.

Common Elements Used in This Section

Field or Control	Description
Student Extensions	Click to access the Student Extensions Page where you can override the institutional CNAS setup options for the student.

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Field or Control	Description
CNAS Calc (Canadian Need Analysis System calculation)	Click to calculate an unofficial federal and institutional family contribution and award amounts using CNAS. RFC invokes a COBOL function to perform the CNAS calculation.

Pages Used to Maintain Full-Time Student Data

Page Name	Definition Name	Navigation	Usage
Student Personal Info	INST_STDNT_CSL_A	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Personal Info**	Enter and view demographic and school data for a student's full-time Canadian application.
Student Extensions	STDNT_CNAS_EXT_SBP	Click the **Student Extensions** button on the Student Personal Info page.	Override institutional level options.
Student Current Stat/ Residency	INST_STDNT_CSL_BC	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Current Stat/Residency**	Enter or view a student's family and residency information.
Student Study Pd Info (student study period information)	INST_STDNT_CSL_D	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Study Pd Info**	Enter or view data regarding the academic program in which the student is enrolled for the study period.
Student Financial Data	INST_STDNT_CSL_E	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Financial Data**	Enter or view a student's pre-study and study period financial data.
Parent Data	INST_PARENT_CSL_J	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Parent Data**	Enter or view information about a parent's family status, income, and taxes.
Spouse Info	INST_STDNT_CSL_K	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Spouse Info**	Enter or view spouse information.

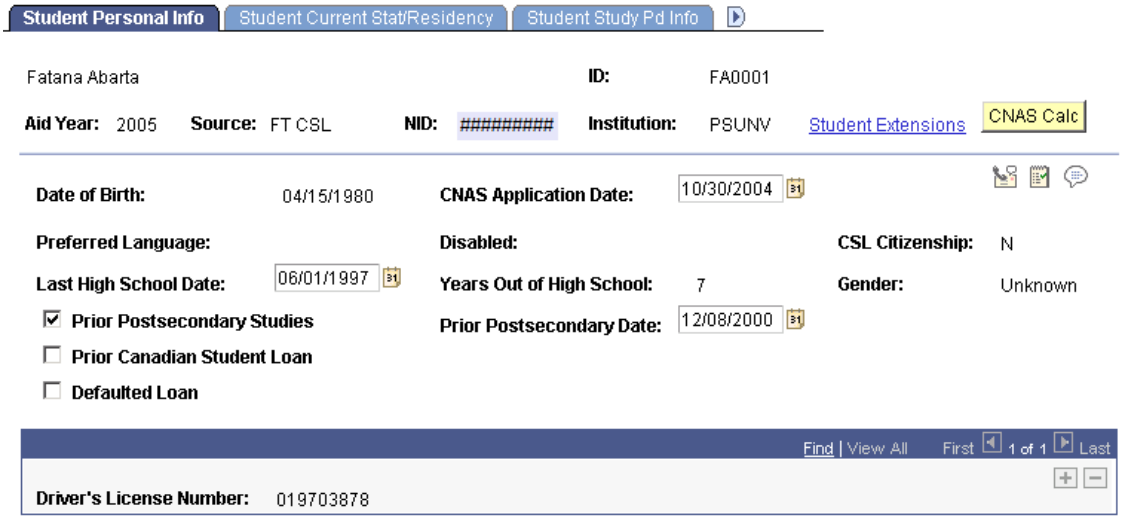
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Page Name	Definition Name	Navigation	Usage
Signature / Next of Kin	INST_STDNT_CSL_M	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Signature/Next of Kin**	Enter or view family and signature information.

Entering Student Personal Information

Access the Student Personal Info page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Personal Info**).

This example illustrates the fields and controls on the Student Personal Info page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Date of Birth	Displays the student's date of birth.
CNAS Application Date (Canadian Need Analysis System application date)	Select the date that the CNAS application was filed.
Preferred Language	Displays the preferred language for the student.
Disabled	Displays whether the student is disabled.
CSL Citizenship (Canada student loan citizenship)	Displays whether CSL citizenship is established.
Last High School Date	Displays the date that the student last attended high school.
Years Out of High School	Displays the number of years the student has been out of high school.
Gender	Displays the student's gender.

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Field or Control	Description
Prior Postsecondary Studies	Select to indicate that the student has prior postsecondary studies.
Prior Postsecondary Date	Enter the date the student was last studying at the postsecondary level.
Prior Canadian Student Loan	Select to indicate that the student received a Canadian student loan in the past.
Defaulted Loan	Select to indicate that the student defaulted on a Canadian student loan.
Driver's License Number	Displays the student's driver's license number.

Overriding Institutional CNAS Options

Access the Student Extensions page (click the **Student Extensions** button on the Student Personal Info page).

The values on this page override institutional level options.

> **Note**
>
> Although many options can be entered and calculated, there might be only one value used to update federal need and family contribution (FC) values and only one value used to update institutional need and FC values. The most recent option entered is used in the calculation.

Field or Control	Description
CNAS Rule Set (Canadian Need Analysis System rule set)	Select the CNAS Rule Set to use for this student. Select *OSL* or *CSL*.
Status	Select the effective status of the extension. Values include *Active* and *Inactive*. Only active extensions are processed.
CSL-OSL (Canada student loan — Ontario student loan)	Select the type of calculation to perform. *O – OSL:* Invokes OSAP special rules for parent tax table use and parental contribution calculations. *C – CSL:* Invokes Canadian rules for parent tax table use and parental contribution calculations.
Enrollment Override	Optionally select a value to override enrollment values for federal or institutional need calculation. Values are: *Full-Time* or *Part-Time*.

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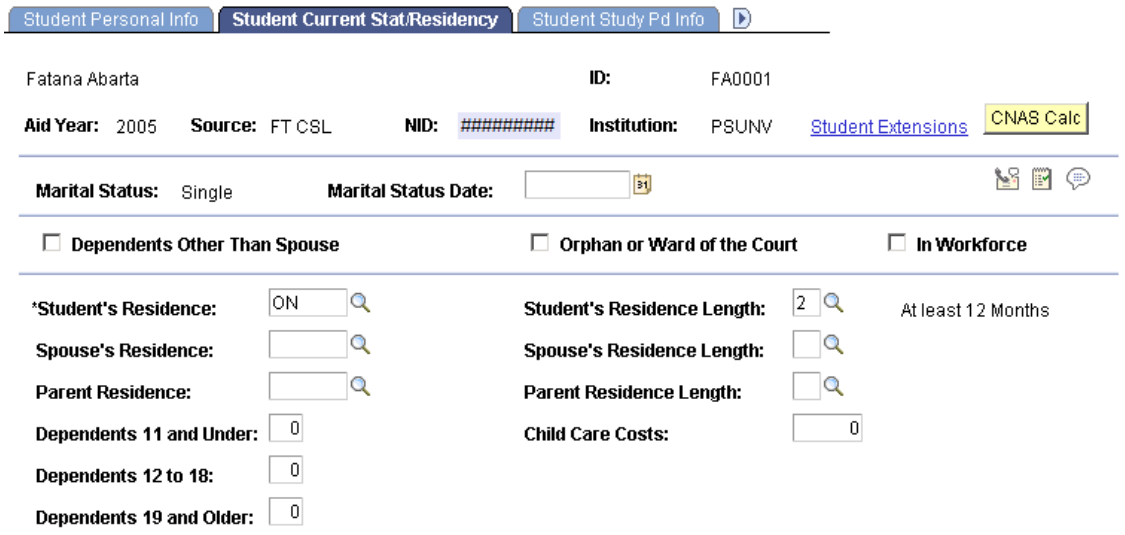
Field or Control	Description
Override Standard Category	Optionally select a value to override standard category values for federal or institutional need calculation. Values are: *Married:* Indicates the student is married. *Sng Dep:* Indicates the student is single and a dependent. *Sng Ind:* Indicates the student is single and independent. *Sole Supp:* Indicates the student is the sole supporter of the household.
Prestudy Weeks Override	Optionally enter a value to override prestudy weeks values for federal or institutional need calculation.
Prestudy Housing Override	Optionally select a value to override prestudy housing values for federal or institutional need calculation. Values are*O – Other* or *P – Parents.*
Car Allowance Override	Enter a dollar amount to override car allowance values for federal or institutional need calculation.
Asset Allowance Override	Enter a dollar amount to override asset allowance values for federal or institutional need calculation.
Spouse Disabled	Select to indicate that the student's spouse is disabled and to override the values for federal or institutional need calculation.
FM/IM Use (federal methodology/institutional methodology use)	Select one of the following: *F – FM EFC:* Use to calculate family contributions and to store information in federal methodology fields in Financial Aid. *I – IM EFC:* Use to calculate family contributions and to store information in institutional methodology fields. *B – Both FM and IM:* Use to store information in both FM and IM fields.
Use Cost of Attendance	Indicates whether *F – fed year coa* (federal year cost of attendance) or *I – inst year coa* (institutional year cost of attendance) is used in calculation of need.
Award Period Use	Indicates whether *A - Academic, B – Both,* or *N – Nonstandard* award periods are updated with calculation results.

Entering Student Family Status and Residency Information

Access the Student Current Stat/Residency page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Current Stat/ Residency**).

This example illustrates the fields and controls on the Student Current Stat/Residency page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Marital Status	Displays the student's marital status.
Marital Status Date	If not single, select the date of the marriage.
Dependants Other Than Spouse	Select if the student has dependents other than a spouse.
Orphan or Ward of the Court	Select if the student is an orphan or a ward of the court.
In Workforce	Select if the student is in the workforce.
Student's Residence	Select the province in which the student lives.
Student's Residence Length	Select the length of time student has lived in the province. Values are: *1:* less than 12 months. *2:* at least 12 months.
Spouse's Residence	Select the province in which the student's spouse lives.
Spouse's Residence Length	Select the length of time the student's spouse has lived in the selected province from the following options: *1:* less than 12 months. *2:* at least 12 months.
Parent Residence	Select the province in which the student's parent lives.
Parent Residence Length	Select the length of time the student's parent has lived in the selected province from the following: *1:* less than 12 months. *2:* at least 12 months.
Dependents 11 and Under	Enter the number of dependents aged eleven or younger.
Dependents 12 to 18	Enter the number of dependents aged twelve to eighteen.

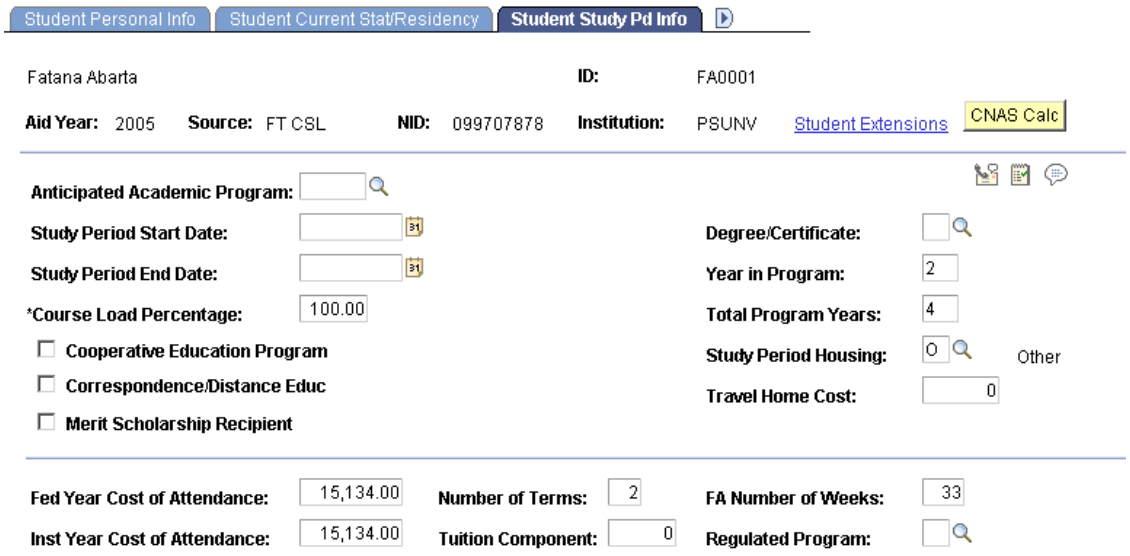
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Field or Control	Description
Dependents 19 and Older	Enter the number of dependents aged nineteen or older.
Child Care Costs	Enter a dollar amount if the student pays child care costs.

Entering Student Study Period Information

Access the Student Study Pd Info page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Study Pd Info**).

This example illustrates the fields and controls on the Student Study Pd Info page. You can find definitions for the fields and controls later on this page.



Data in many of the fields on this page default from setup tables and from FA Term data. You can overwrite the default data on this page.

Field or Control	Description
Anticipated Academic Program	Select an academic program in which the student plans to enroll.
Study Period Start Date and **Study Period End Date**	Enter the dates on which the study period begins and ends.
Course Load Percentage	Enter the percentage of a full-time course load in which the student is enrolled. For example, if the student is enrolled half-time, enter *50.00*.
Cooperative Education Program	Select if the student is enrolled in a co-op program.
Correspondence/Distance Educ (correspondence/distance education)	Select if the student is enrolled in a correspondence or distance education program.

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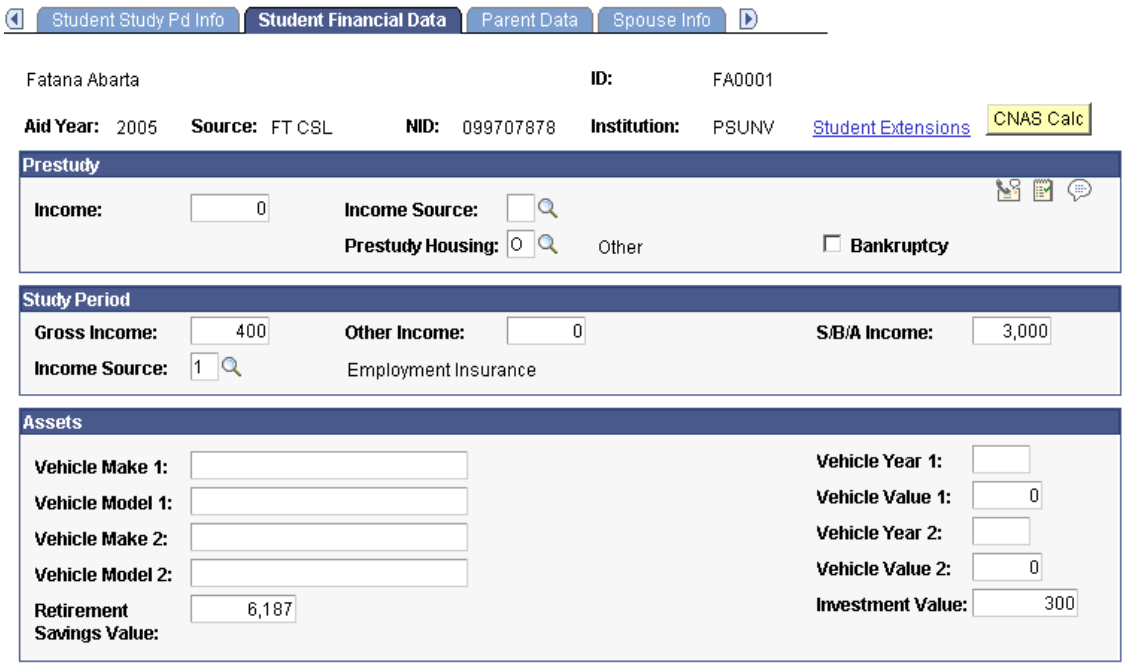
Field or Control	Description
Merit Scholarship Recipient	Select if the student is receiving a merit scholarship.
Degree/Certificate	Select the degree or certificate that the student is working toward at the institution. Values are: *1:* Diploma *2:* Certificate *3:* Bachelor's Degree *4:* Master's Degree *5:* Doctoral Degree
Year in Program	Enter the year of the program in which the student is currently enrolled.
Total Program Years	Enter the total number of years that it takes to complete the program.
Study Period Housing	Select a value to indicate whether a student is living with parents *(P – parents)* or living elsewhere *(O – Other).*
Travel Home Cost	Enter an amount allowed for a student to travel home from school during the study period.
Fed Year Cost of Attendance (federal year cost of attendance)	Enter the federal methodology amount for a yearly cost of attendance.
Inst Year Cost of Attendance (institutional year cost of attendance)	Enter the institutional methodology amount for a yearly cost of attendance.
Number of Terms	Enter the number of terms for use in the resource calculation for Additional Cost Recovery, which is a deregulated program.
Tuition Component	Enter tuition and fees data to be used by the Additional Cost Recovery program.
FA Number of Weeks (financial aid number of weeks)	Enter the number of weeks that are considered part of the study period for financial aid purposes.
Regulated Program	Indicate whether a program is regulated *(R – Regulated Program)* or non-regulated *(N – Non-Regulated Program)* based on criteria from the Ministry of Education and Training.

Entering Student Financial Data

Access the Student Financial Data page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Student Financial Data**).

This example illustrates the fields and controls on the Student Financial Data page. You can find definitions for the fields and controls later on this page.

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Prestudy

Field or Control	Description
Income	Enter the student's pre-study income amount.
Income Source	Select from the following values: *1:* Ontario Disability Pgm *2:* Family Benefits *3:* General Welfare *4:* Other
Prestudy Housing	Select from the following values: *O:* Other *P:* With Parents
Bankruptcy	Select if the student has declared bankruptcy in the past.

Study Period

Field or Control	Description
Gross Income	Enter an amount for the student's gross income during the study period.
Other Income	Enter an amount for any other income the student receives during the study period.
S/B/A Income (scholarship, bursary, and award income)	Enter the gross income recorded on the student assistance application for income from scholarships, bursaries and awards the student is to receive during the study period.

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Field or Control	Description
Income Source	Select a source of income received during the study period from the following: *1:* Employment Insurance *2:* Loss of Earnings Benefits *3:* Extended Care & Maint Alwnc (maintenance allowance) *4:* Ontario Disability Support Pgm (program) *5:* Ontario Works *6:* Family Benefits *7:* Natv Post-Sec Stu Sup Pgm (Native Post-secondary Student Support Program) *8:* Canada Pension Plan *9:* Other

Assets

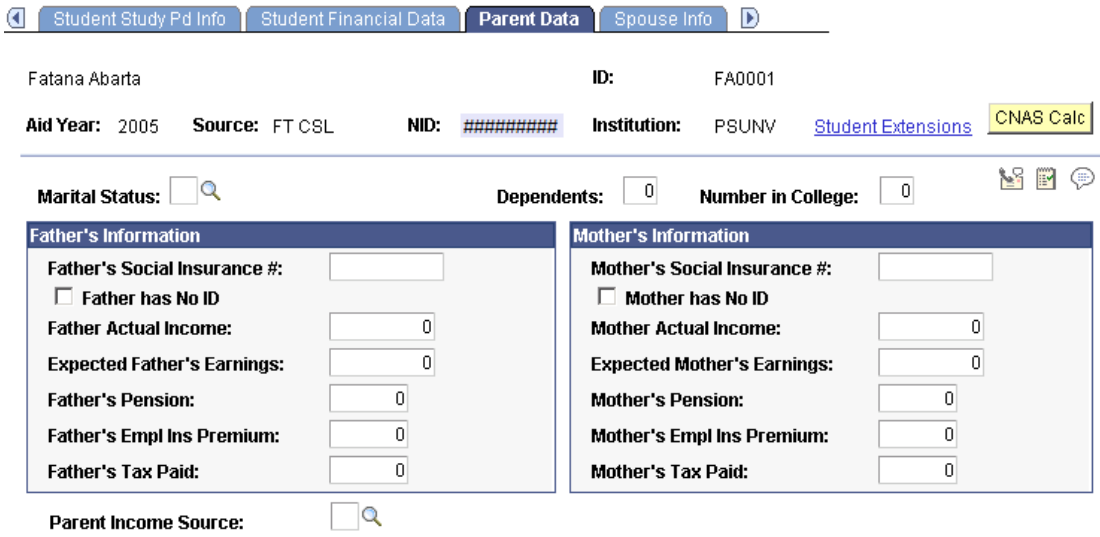
Field or Control	Description
Vehicle Make 1 and **Vehicle Make 2**	Enter the makes of the cars that the student owns.
Vehicle Model 1 and **Vehicle Model 2**	Enter the models of the cars that the student owns.
Vehicle Year 1 and **2**	Enter the years of the cars the student owns.
Vehicle Value 1 and **Vehicle Year 2**	Enter the values of the cars that the student owns.
Retirement Savings Value	Enter the student's retirement savings amount.
Investment Value	Enter the student's investment value amount.

Entering Parent Data

Access the Parent Data page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Parent Data**).

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

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Field or Control	Description
Marital Status	Select from: *C – Common-law, D – Divorced, E – Separated, H – Head of Household, M – Married, S – Single, U – Unknown,* and *W – Widowed.*
Dependents	Enter the number of dependents that the parents have.
Number in College	Enter the number of people in college in the parent's household.

Father's Information

Field or Control	Description
Father's Social Insurance #	Enter the father's social insurance number.
Father Has No ID	Select this check box if the father has no social insurance number.
Father Actual Income and **Expected Father's Earnings**	Enter an amount for either the father's actual income or the father's expected earnings.

Field or Control	Description
Father's Pension	Enter an amount for the father's pension if he receives one.
Father's Empl Ins Premium (father's employment insurance premium)	Enter an amount of employment insurance for the father.
Father's Tax Paid	Enter the amount of tax that the father paid.

Mother's Information

The fields in the **Mother's Information** group box are the same as those in the **Father's Information** group box.

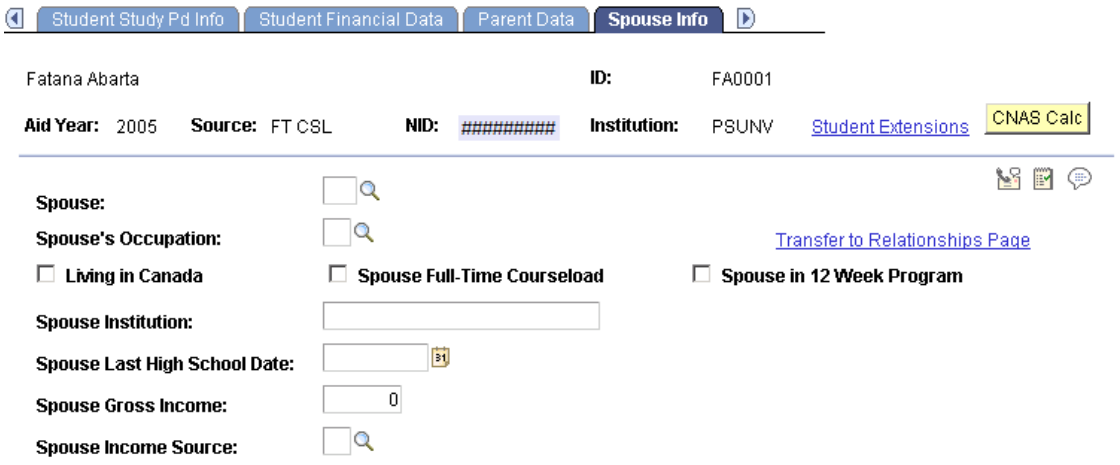
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Field or Control	Description
Parent Income Source	Select the parent's income source from the following: *1:* Ontario Disability Program *2:* Family Benefits *3:* General Welfare *4:* Other

Entering Spouse Information

Access the Spouse Info page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Spouse Info**).

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



Field or Control	Description
Spouse	Select the student's spouse. The student's spouse is identified by an ID number, a relationship number, and relationship name. If the spouse is not among the options, enter the spouse's information on the Relationships page.
Spouse's Occupation	Select from the following values: *1:* Full−time Student *2:* Employed, full-time *3:* Employed, part-time *4:* Unemployed *5:* Other
Transfer to Relationships Page	Click this link to access the Relationships page to enter a person's relationship to a student in your system.
Living in Canada	Select if the student's spouse lives in Canada.

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Field or Control	Description
Spouse Full-Time Course load	Select if the student's spouse is taking a full-time course load in school.
Spouse 12 Week Program	Select if the student's spouse is enrolled in a 12 week program.
Spouse Institution	Enter the name of the spouse's institution if the student's spouse is enrolled in a program.
Spouse Last High School Date	Enter the date that the spouse last attended high school.
Spouse Gross Income	Enter the amount of the spouse's gross income.
Spouse Income Source	Select from the following values: *1:* Ontario Disability Prgm *2:* Family Benefits *3:* General Welfare *4:* Other

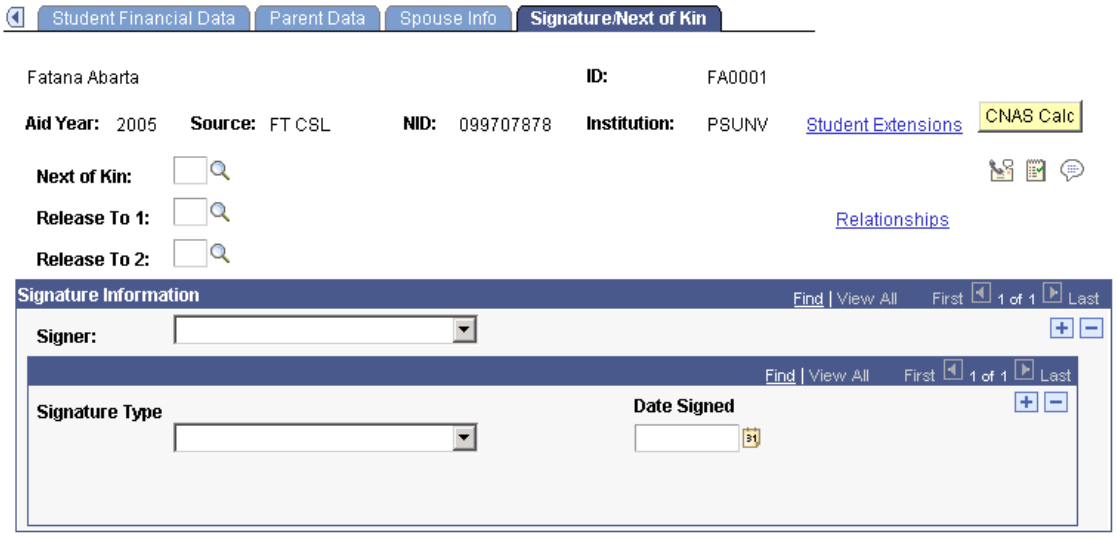
Related Topics

- Campus Community Fundamentals: Understanding Biographical Information

Entering Signature and Next of Kin Information

Access the Signature/Next of Kin page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update FT Application**, and then **Signature/Next of Kin**).

This example illustrates the fields and controls on the Signature/Next of Kin page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Next of Kin	Select the next of kin for the student. You may need to go the Relationship page to add a person before you can select the person.
Release To 1 and **Release To 2**	Select the first and second person to whom your institution releases information about the student. You may need to go the Relationship page to add a person before you can select the person.
Relationships	Click this link to access the Relationships page where you can enter a person's relationship to a student in your system.

Signature Information

Field or Control	Description
Signer	Select a signer. Values are: *Applicant, Father, Mother,* and *Spouse.* You can have multiple signature information by adding additional rows.
Signature Type	Select a signature type. Values are: *Collect Income Tax Info, Collect Personal Info, Part-time Appl Signature,* and *Release Personal Info.* You can have multiple signature types by adding additional rows.
Date Signed	Enter the date signed for each signature type.

Maintaining Part-Time Student Data

Different Canadian financial aid applications are available for full-time and part-time students. Use the Part-time Application component to enter and maintain data for part-time students. If you have full-time application data in your system for a student, the system populates this data in the fields on the part-time application.

This section lists common elements and discusses how to:

- Enter student and dependency information.
- Enter student and spousal financial information.
- Enter study period information.

Common Elements Used in This Section

Field or Control	Description
Part-time Student Extension	Click to access the Student Extensions page where you can override the institutional CNAS options for the student.

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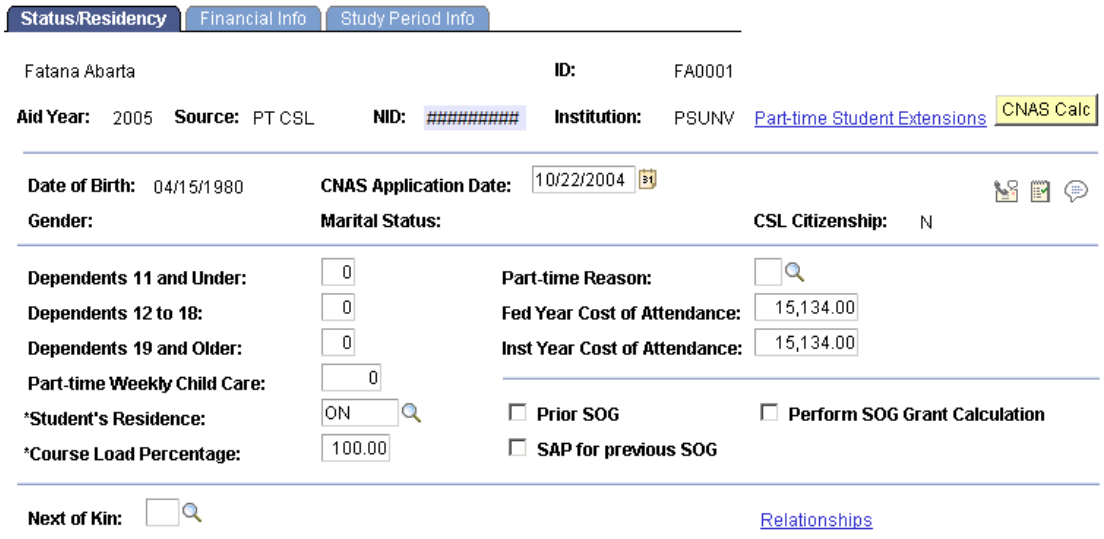
Pages Used to Maintain Part-Time Student Data

Page Name	Definition Name	Navigation	Usage
Status/Residency	INST_PT_STDNT_A	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update PT Application**, and then **Status Residency**	Enter or view student and dependency information.
Student Extensions	STD_CNAS_PT_EXT	Click the **Part-time Student Extensions** link on the Status/ Residency page.	Override institutional level options.
Financial Info	INST_PT_STDNT_CD	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update PT Application**, and then **Financial Info**	Enter or view student and spousal financial information.
Study Period Info	INST_PT_STDNT_EF	**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update PT Application**, and then **Study Period Info**	Enter or view study period information.

Entering Student and Dependency Information

Access the Status/Residency page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update PT Application**, and then **Status Residency**).

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



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Field or Control	Description
Date of Birth	Displays the student's date of birth.
CNAS Application Date (Canadian Need Analysis System application date)	Displays the date of the CNAS application.
Gender	Displays the student's gender.
Marital Status	Displays the student's marital status.
CSL Citizenship (Canada student loan citizenship)	Indicates whether the student is a citizen.
Dependents 11 and Under	Enter the number of dependents aged eleven or younger.
Dependents 12 to 18	Enter the number of dependents aged twelve to eighteen.
Dependents 19 and Older	Enter the number of dependents aged nineteen or older.
Part-time Weekly Child Care	Enter an amount if applicable.
Student's Residence	Select the province in which the student lives.
Course Load Percentage	Enter the course load percentage the student is taking.
Part-time Reason	Select from the following values: *1:* Single Parent. *2:* Elderly Dependents. *3:* Restricted Mature Student. *4:* Disabled. *5:* Grade Improvement. *6:* Excessive Debt. *7:* Financial. *8:* Course Not Available. *9:* Program Almost Complete. *0:* Other.
Fed Year Cost of Attendance (federal year cost of attendance)	Enter an amount for the federal year cost of attendance.
Inst Year Cost of Attendance (institutional year cost of attendance)	Enter an amount for the institutional year cost of attendance.
Prior SOG (prior special opportunity grant)	Select if the student has a prior special opportunity grant.
SAP for Previous SOG (student assistance program for previous special opportunity grant)	Select if the student has a student assistance program for previous special opportunity grant.
Perform SOG Grant Calc (perform special opportunity grant calculation)	Select to perform a calculation for SOG eligibility. **Note:** Eligibility for SOG is calculated only if you select the **Perform SOG Grant Calc** check box.
Next of Kin	Select a number for the next of kin. You may need to go into the relationship page to add a person before you can select the number for next of kin.

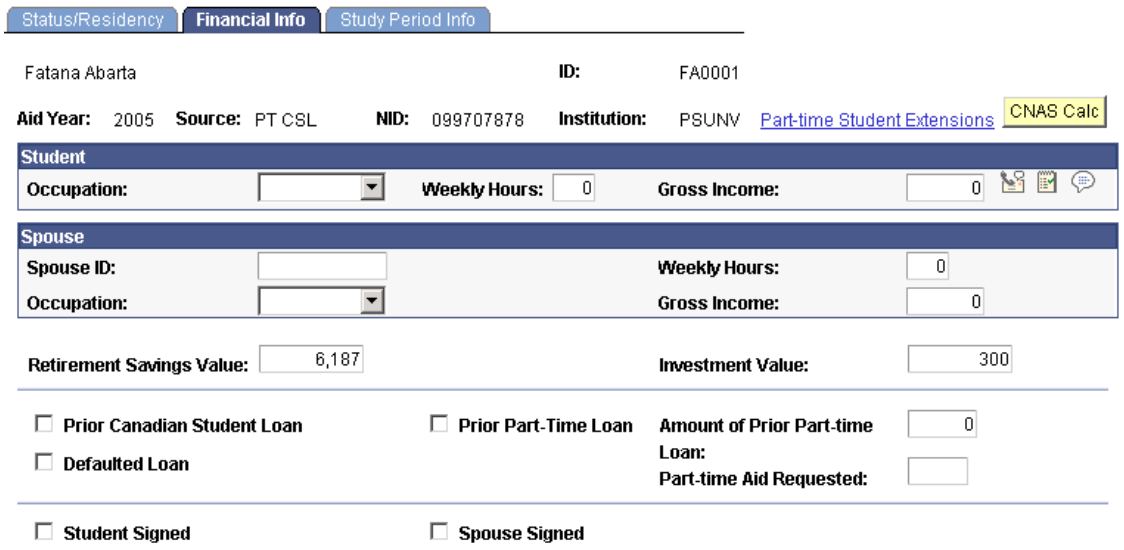
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Field or Control	Description
Relationships	Click this link to access the Relationships page where you can enter a person's relationship to a student in your system.

Entering Student and Spouse Financial Information

Access the Financial Info page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update PT Application**, and then **Financial Info**).

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



Student

Field or Control	Description
Occupation	Select from the following options: *Empl FT* (employed full-time), *Empl PT* (employed part-time), *FT Std* (full-time student), *Other*, and *Unemp* (unemployed).
Weekly Hours	Enter the student's weekly hours worked.
Gross Income	Enter the student's gross income.

Spouse

Field or Control	Description
Spouse ID	Enter the spouse's unique identification.
Weekly Hours	Enter the spouse's weekly hours worked.

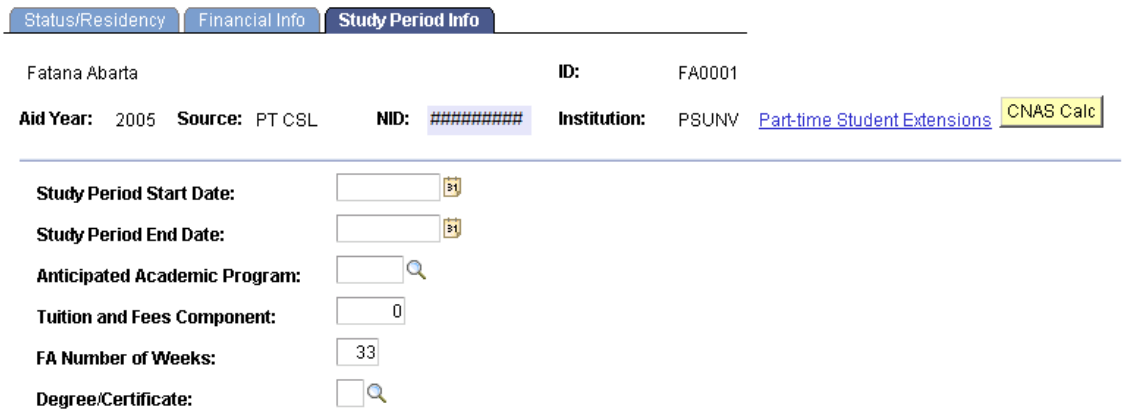
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Field or Control	Description
Occupation	Select from the following options: *Empl FT* (employed full-time), *Empl PT* (employed part-time), *FT Std* (full-time student), *Other*, and *Unemp* (unemployed).
Gross Income	Enter the spouse's gross income.
Retirement Savings Value	Enter the value of the student's retirement savings.
Investment Value	Enter the value of the student's investments.
Prior Canadian Student Loan	Select if the student has a prior Canadian student loan.
Prior Part-time Loan	Select if the student has a prior part-time loan.
Amount of Prior Part-time Loan	Enter the student's prior part-time loan amount.
Defaulted Loan	Select if the student has defaulted on a loan.
Part-time Aid Requested	Enter the amount of part-time aid requested.
Student Signed	Select if the student signed the application.
Spouse Signed	Select if the student's spouse signed the application.

Entering Study Period Information

Access the Study Period Info page (**Financial Aid**, and then **Canadian Application Data**, and then **Create/Update PT Application**, and then **Study Period Info**).

This example illustrates the fields and controls on the Study Period Info page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Study Period Start Date and **Study Period End Date**	Enter or view the dates on which the study period begins and ends.

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Field or Control	Description
Anticipated Academic Program	Select an anticipated program for the student.
Tuition and Fees Component	Enter a tuition and fee amount.
FA Number of Weeks (financial aid number of weeks)	Enter the number of financial aid weeks.
Degree/Certificate	Select a degree or certificate for the student. Values are: *1:* Diploma *2:* Certificate *3:* Bachelor's Degree *4:* Master's Degree *5:* Doctoral Degree

Reviewing CNAS Calculation Results

This section discusses how to:

- View results of CNAS calculation 1.
- View results of CNAS calculation 2.
- View results of CNAS calculation 3.

Pages Used to Review CNAS Calculation Results

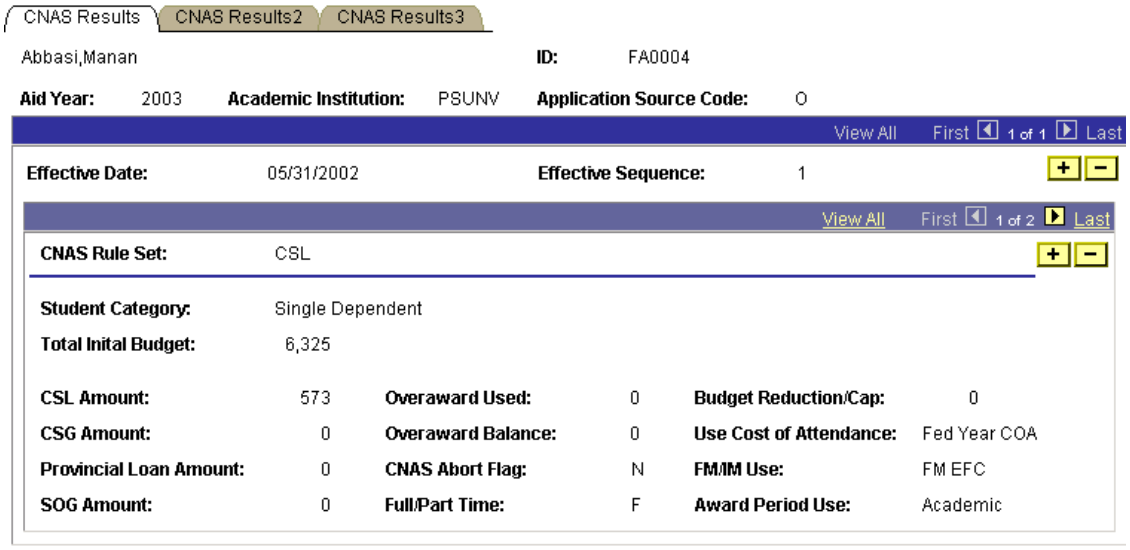
Page Name	Definition Name	Navigation	Usage
CNAS Results	CNAS_RESULTS	**Financial Aid**, and then **Canadian Application Data**, and then **View CNAS Results**, and then **CNAS Results**	View results of the calculations performed. You can run multiple calculations for a single student and view them by effective date and effective sequence.
CNAS Results 2	CNAS_RESULTS2	**Financial Aid**, and then **Canadian Application Data**, and then **View CNAS Results**, and then **CNAS Results2**	View results of the calculations performed.
CNAS Results 3	CNAS_RESULTS3	**Financial Aid**, and then **Canadian Application Data**, and then **View CNAS Results**, and then **CNAS Results3**	View results of the calculations performed.

Viewing Results of CNAS Calculation 1

Access the CNAS Results page (**Financial Aid**, and then **Canadian Application Data**, and then **View CNAS Results**, and then **CNAS Results**).

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



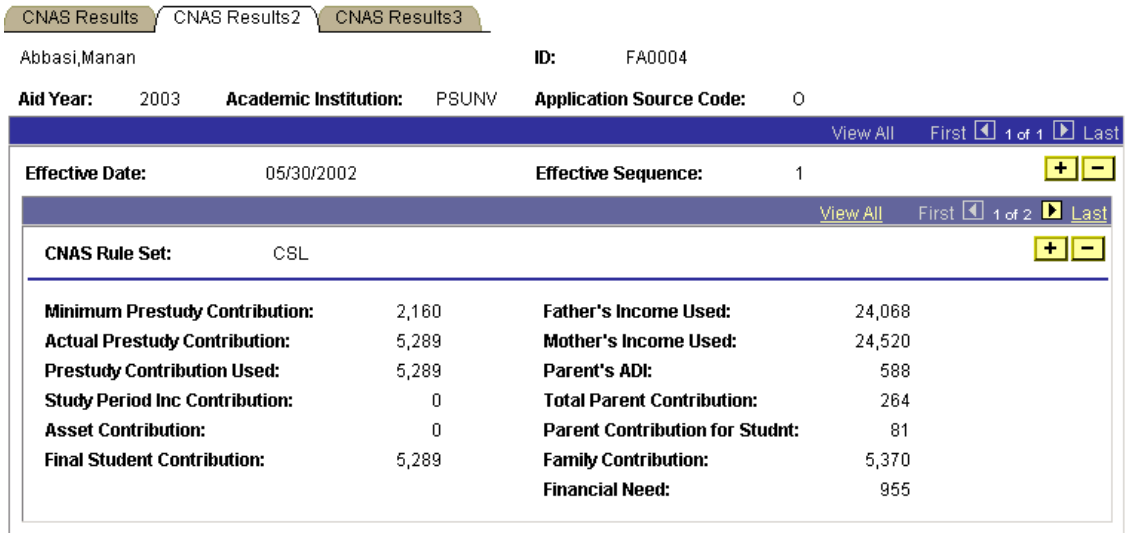
Field or Control	Description
CNAS Rule Set (Canadian Need Analysis System rule set)	Displays the rule set of the CNAS calculation.
Student Category	Indicates the student's dependency status.
Total Initial Budget	Displays the student's budget.
CSL Amount (Canadian student loan amount)	Displays the CSL loan eligibility amount.
CSG Amount (Canadian study grant amount)	Displays the CSG eligibility amount.
Provincial Loan Amount	Displays the provincial loan eligibility amount.
SOG Amount (special opportunity grant amount)	Displays the SOG eligibility amount.
Overaward Used	Indicates whether overaward was used in the calculation.
Overaward Balance	Displays the overaward balance amount.
CNAS Abort Flag (Canadian Need Analysis System abort flag)	Displays the CNAS abort flag.
Full/Part Time	Indicates whether the student is full-time or part-time.
Budget Reduction/Cap	Displays the budget reduction amount.
Use Cost of Attendance	Displays the type of COA.
FM/IM Use (Federal methodology/institutional methodology use)	Displays whether the system used FM or IM in the calculation.
Award Period Use	Displays the award period that the system used for the calculation.

Viewing Results of CNAS Calculation 2

Access the CNAS Results2 page (**Financial Aid**, and then **Canadian Application Data**, and then **View CNAS Results**, and then **CNAS Results2**).

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This example illustrates the fields and controls on the CNAS Results2 page. You can find definitions for the fields and controls later on this page.



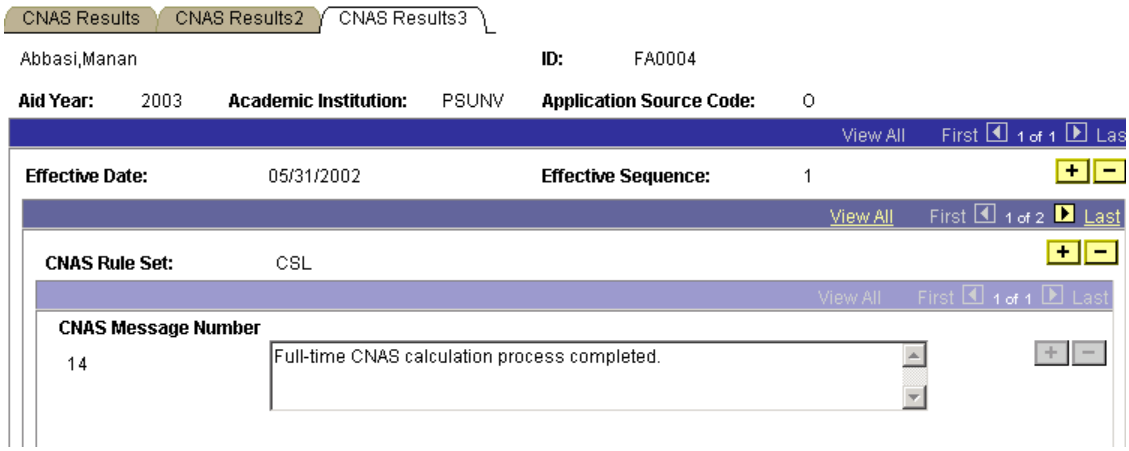
Field or Control	Description
Minimum Prestudy Contribution	Displays the student's minimum prestudy contribution.
Actual Prestudy Contribution	Displays the student's actual prestudy contribution from income.
Prestudy Contribution Used	Displays the amount of prestudy contribution used from income.
Study Period Inc Contribution (study period income contribution)	Displays the expected study period contribution from income.
Asset Contribution	Displays the contribution amount based on assets.
Final Student Contribution	Displays the student's final contribution amount.
Father's Income Used	Displays the father's income used for calculation.
Mother's Income Used	Displays the mother's income used for calculation.
Parent's ADI (parent's annual discretionary income)	Displays the parent's annual discretionary income.
Total Parental Contribution	Displays the total parent contribution.
Parent Contribution for Student	Displays the parent contribution for the student.
Family Contribution	Displays the total family contribution.
Financial Need	Displays the financial need for the student.

Viewing Results of CNAS Calculation 3

Access the CNAS Results3 page (**Financial Aid**, and then **Canadian Application Data**, and then **View CNAS Results**, and then **CNAS Results3**).

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This example illustrates the fields and controls on the CNAS Results3 page.



Viewing Audits

This section discusses how to:

- View changes made to applications.
- View changes made to extension data.

Pages Used to View Audits

Page Name	Definition Name	Navigation	Usage
Application Audit	CSL_AUDIT	**Financial Aid**, and then **Canadian Application Data**, and then **View Application Audit**, and then **Application Audit**	View a history of changes made to entries for the student application record.
Extension Audit	EXT_AUDIT	**Financial Aid**, and then **Canadian Application Data**, and then **View Extension Audit**, and then **Extension Audit**	View changes made to the Student Extension record.

Viewing Changes Made to Applications

Access the Application Audit page (**Financial Aid**, and then **Canadian Application Data**, and then **View Application Audit**, and then **Application Audit**).

Field or Control	Description
Date and Time Stamp	Displays the date and time changes were made to the application.
Field Name	Displays the changed field name.
Old Value	Displays the previous value before change.

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Field or Control	Description
New Value	Displays the new value.
User ID	Displays the unique identification of the person who made the change.
Record (Table) Name	Displays the record/table name of the changed field.

Viewing Changes Made to Extension Data

Access the Extension Audit page (**Financial Aid**, and then **Canadian Application Data**, and then **View Extension Audit**, and then **Extension Audit**).

Field or Control	Description
Date and Time Stamp	Displays the date and time changes were made to the extension record.
Field Name	Displays the changed field name.
Old Value	Displays the previous value before the change.
New Value	Displays the new value.
User ID	Displays the unique identification of the person who made the change.
Record (Table) Name	Displays the record/table name of the changed field.

Inserting an ISIR Row

This section discusses how to create ISIR records for mass packaging.

Related Topics

- Awarding Online
  This section discusses how to:

Page Used to Insert an ISIR Row

Page Name	Definition Name	Navigation	Usage
ISIR Row Insert	RUNCTL_CAN_APP	**Financial Aid**, and then **Canadian Application Data**, and then **Insert ISIR Rows**, and then **ISIR Row Insert**	Create ISIR records for mass packaging.

Create ISIR Records for Mass Packaging

Access the ISIR Row Insert page (**Financial Aid**, and then **Canadian Application Data**, and then **Insert ISIR Rows**, and then **ISIR Row Insert**).

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Field or Control	Description
Institution	Enter the institution for which to run the process.
Aid Year	Enter the aid year for which to run the process.

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50

Financial Aid Reports

Financial Aid Reports: A to Z

This table lists the Financial Aid reports, sorted alphabetically by Report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
FA753 Equation Report	Print the complete content of a selected equation. Reporting Tool: Oracle BI Publisher	**Set Up SACR**, and then **Common Definitions**, and then **Equation Engine**, and then **Print Equations**	EQTN_PRT_RUN_CNTL
FA801 Award Data by Item Type	Reports to whom each financial aid item type was awarded as well as whether the award has been disbursed to the student. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Fund Management**, and then **FA801 Award Data by Item Type**	RUNCTL_FA_RPT_801
FA822 Batch Packaging Detail	Used to review the award package for each student awarded during a Mass Packaging run. The students are organized by packaging plan. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Awards**, and then **Mass Packaging**, and then **Mass Packaging Detail Report**	RUNCTL_FA_RPT_822
FA850 Direct Loan Origination Authorization Summary	Provides a summary of Originated records which passed the Origination Validation and are ready to be sent to COD. This report should be run after running the Loan Origination and Direct Loan Outbound processes having origination and Validate check box checked on the run control page. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Origination Auth Report**	RUNCTL_FA_LN_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FA853 DL Accepted Originations	Reports originated loans accepted by the LOC. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Accepted Originations Report**	RUN_CNTL_FA853_RPT
FA854A DL Loans on Hold	Reports loans placed on hold. Loans are placed on hold by the system when rejected origination acknowledgement, origination change acknowledgement, and disbursement acknowledgement files are received. You can also place loans on hold manually. Use after every import function. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Loans on Hold Report**	RUN_CNTL_FA854_RPT
FA855 DL PLUS Credit Decision	Reports decision statuses for PLUS loans, allowing you to advise the parent whether they qualify, need a cosigner, etc. Use after you receive the PLUS origination acknowledgement file. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **PLUS Credit Decision**	RUN_CNTL_FA855_RPT
FA856A DL Rejected Originations	Reports origination and origination change acknowledgements rejected by the LOC. This report assists you in identifying the reject reason(s). Use after the origination acknowledgement file is imported. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Rejected Originations Report**	RUN_CNTL_FA856_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FA857 DL Transmitted Originations	Reports originations submitted to the LOC. The report is a cumulative list of originations. This allows you to track transmitted origination files and identify transmitted origination files that may have outstanding acknowledgments. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Origination Export Report**	RUN_CNTL_FA857_RPT
FA858 DL Pending Origination Changes	Reports transmitted changes made to previously originated loans. Use after sending out Origination Change files. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Origination Changes Report**	RUN_CNTL_FA858_RPT
FA860A DL Validation Errors	Reports validation rejects. This report is designed to assist you in resolving potential errors prior to outbounding Origination records. Use after you run the validation process. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Validation Errors Report**	RUN_CNTL_FA860_RPT
FA866 DL Disbursement Errors	Reports disbursements rejected by the LOC. The report assists you in resolving errors reported on the Disbursement Acknowledgement file. Use after the disbursement acknowledgement has been imported. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Disbursement Errors Report**	RUN_CNTL_FA866_RPT
FA867 DL Disbursement Status	Reports disbursement status and booked status for loans. Use weekly. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Disbursement Status Report**	RUN_CNTL_FA867_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FA868 DL Disbursement Booking Stat	Reports Disbursement Booked and Unbooked status. Designed for use with Reconciliation Processing. Use weekly. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Disbursement Booking Report**	RUN_CNTL_FA868_RPT
FA870 Print Pell Grant ESOA	Reports Federal Pell Grant Fund allocations. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Cash Management Reports**, and then **Print Grant ESOA**	RUN_CNTL_PG_ESOA
FA871 YTD Originations	Reports students who are in an origination year-to-date file sent by COD. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Year To Date Reports**, and then **YTD Originations**	RUN_CNTL_PGOYTD_AL
FA873 YTD Disbursements	Reports students who have been disbursed as of the year to date. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Year To Date Reports**, and then **YTD Disbursements**	RUN_CNTL_PGDYTD_AL
FA875 Pell MRR Report by Batch	Reports POP (potential overaward payment) and Blocked Institution situation by specific batches. Use after the MRR inbound file is imported. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Multiple Reporting**, and then **MRR by Batch**	RUN_CNTL_FA_875_RPT
FA875A Pell MRR Report	Reports POP (potential overaward payment) and Blocked Institution situation. Use after the MRR inbound file is imported. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Multiple Reporting**, and then **MRR Report**	RUN_CNTL_PG_MRR
FA875B Pell MRR Report by MRR Status	Reports POP (potential overaward payment) and Blocked Institution situation by specific Status codes. Use after the MRR inbound file is imported. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Multiple Reporting**, and then **MRR by Status**	RUN_CNTL_FA875B_RP

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Report ID and Report Name	Description	Navigation	Run Control Page
FA876 Pell Originations by Action Code	Reports students' originations by action code. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Origination Reports**, and then **Originations by Action Code**	RUN_CNTL_PG_OACTN
FA877 Pell Disbursements by Action Code	Reports students' disbursements by action code. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Disbursement Reports**, and then **Disbursements by Action Code**	RUN_CNTL_PG_DACTN
FA878 Pell Origination Records	Reports from your Pell Grant population what has been originated and whether the records have been imported or exported from the application tables. Use after you have run the origination process and after origination records have been exported, or after origination acknowledgement files have been imported. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Origination Reports**, and then **Origination Import and Export**	RUN_CNTL_FA878_RPT
FA879 Pell Origination by Orig Stat	Reports originations and current origination status. Displays status of all origination records. You can run the report for one of seven different statuses: Accepted, Corrected, Originated, Rejected, Transmitted, Changed to Origination, and Cancelled. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Origination Reports**, and then **Origination Status**	RUN_CNTL_FA879_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FA882 Pell Records by Trans Stat	Reports students in different transaction statuses. You can run the report by using one of five different statuses: Cancel, On Hold, Ready, Review, and Transmitted. Depending on the status, the report can be run after origination or disbursement inbound records have been imported. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Origination Reports**, and then **Transaction Status**	RUN_CNTL_FA882_RPT
FA883 Pell Disbursement Records	Reports which student records have either had disbursement requests made or actual disbursements acknowledged. Reports consist of all disbursement status types. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Disbursement Reports**, and then **Disbursement Records**	RUN_CNTL_FA883_RPT
FA884 Disbursements by Dsb Stat	Reports the status of disbursement records that have been imported or exported. You can run the report for one of seven different statuses. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Disbursement Reports**, and then **Disbursements by Status**	RUN_CNTL_FA884_RPT
FA888 Pell Awds w/o Orig	Reports all students who have Pell awards (on the Awards pages) who do NOT have Pell Origination records. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **Origination Reports**, and then **Records With No Origination**	RUN_CNTL_FA888_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FA901 CommonLine Loans on Hold	Reports FFELP and Alternative loans placed on hold. Holds can be placed automatically by the CommonLine Loan In, CommonLine Loan Out and manually through the CommonLine Loan Orig Trans page. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Commonline Reconciliation**, and then **Loans on Hold Report**	RUN_CNTL_FA901_RPT
FA902 CommonLine Validation Errors	Reports originated loans that have failed the loan validation process. The report selects records that have failed validation and those that failed when run in simulation mode. Use post validation. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Commonline Reconciliation**, and then **Validation Error Report**	RUN_CNTL_FA902_RPT
FA903 CommonLine 4 Application Response Load Errors	Reports all CommonLine 4 application response records that erred when the CommonLine Loan In process was run. The report displays information necessary to clear the error conditions so that the record loads. Use after loading Application Response files. Setting the Load Status to Processed removes records from the report. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **File Management**, and then **CommonLine Loans**, and then **CL4 Load Error Report**	RUN_CNTL_FA903_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FA904 CommonLine 4 School Certification Requests	Reports all School Certification requests delivered on a CommonLine 4 Application Response file. The report provides the information necessary to process the loan request. You must enter enough information about the borrower and loan so that the loan can be originated by the loan system. Use after running FA903 and detecting school certification request load errors. Setting the Load Status to Processed removes records from the report. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **Commonline Reconciliation**, and then **CL4 Certification Request Rpt**	RUN_CNTL_FA904_RPT
FA906 Award vs. Disbursement Reconciliation	Reports selected financial aid item types where the awarded accept amount does not match the disbursed amount. Run daily. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Disbursement**, and then **Reconciliation Report**	RUN_CNTL_FA906_RPT
FA907 CommonLine 4 EFT Reconciliation	Reports EFT disbursements where the EFT amount has not yet been disbursed. Sorted by EFT batch receipt date. Run daily to insure that loan funds are disbursed and returned in compliance with federal regulations. Used in conjunction with the CommonLine Disbursement Maintenance page. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **CommonLine Reconciliation**, and then **CL4 EFT Discrepancy Report**	RUN_CNTL_FA907_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FA913 Authorization Failure Report	Reports student disbursement records that have failed the authorization process. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Disbursement**, and then **Authorization Failure Report**	RUN_CNTL_FA913_RPT
FA920 Fund Roster	Reports total offered, accepted, authorized, and disbursed amounts for the financial aid item types you specify. A list of students and their offered, accepted, authorized, and disbursed amounts is provided for each financial aid item type. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Fund Management**, and then **Fund Roster**	RUN_CNTL_FA920_RPT
FA921 NSLDS FAT Load Errors	Reports NSLDS Transfer Alert file records that were unable to load into the database. Users must resolve the error and rerun the NSLDS Load process to resolve the error. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **File Management**, and then **NSLDS**, and then **NSLDS FAT Load Error Report**	RUNCTL_FA921
FA922 Overaward Report	Reports students who have been overawarded. Displays the amount of the overaward and information about the student's COA, EFC, need, and total over awarded amount. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Awards**, and then **Generate Overaward Report**	RUN_CNTL_FA922_RPT
FA927 ISIR Suspense Detail	Reports all ISIRs that suspended or are set to error by the ISIR Load program. Data on the report derives from the ISIR Suspense Management page. Run after the FAPSAR00 process is run. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **ISIR Suspense Detail Report**	RUNCTL_FA927

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Report ID and Report Name	Description	Navigation	Run Control Page
FA9071 CL4 EFT Received/Paid Amount Discrepancy	Reports EFT disbursements where the EFT amount received does not equal the amount paid. Run daily to insure that loan funds are disbursed and returned in compliance with federal regulations. Used in conjunction with the CommonLine Disbursement Maintenance page. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **CommonLine Reconciliation**, and then **CL4 EFT Discrepancy Report**	RUN_CNTL_FA907_RPT
FA9072 CL4 EFT Undisbursed EFT	Reports EFT disbursements where the EFT amount received is > 0 and the paid amount = 0. Run daily to insure that loan funds are disbursed and returned in compliance with federal regulations. Used in conjunction with the CommonLine Disbursement Maintenance page. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Loans**, and then **CommonLine Reconciliation**, and then **CL4 EFT Discrepancy Report**	RUN_CNTL_FA907_RPT
FADLBOOK DL Originations Booking Status	Reports all loans for a specified booking status, aid year, and institution. Use after you inbound the disbursement file or whenever necessary. Reporting Tool: SQR	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Booking Status Report**	RUN_CNTL_FADLBOOK
FADLEXCP DL Disbursement Exceptions	Reports mismatched statuses between origination, disbursements, and the DLSAS booking status. Use after the DLSAS file has been imported and processed. Reporting Tool: SQR	**Financial Aid**, and then **Loans**, and then **Direct Lending Reconciliation**, and then **Report Disbursement Exception Summary**	RUNCTL_FA_EXCEP_LN

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Report ID and Report Name	Description	Navigation	Run Control Page
FADLRECN DL Reconciliation Report	Reports differences between an imported DLSAS file and system data. Reporting Tool: SQR	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **Generate Reconciliation Report**	RUNCTL_DL_RECON
FADLSAS DL School Account Statement	Reports the Cash Summary Section, the Cash Detail Section, and the Loan Detail Section of the DLSAS file received from the LOC. Use after the DLSAS file has been imported to the EDI Manager staging tables. Reporting Tool: SQR	**Financial Aid**, and then **Loans**, and then **DL School Account Summary**, and then **Generate DLSAS Report**	RUNCTL_DLSAS
FAISRJAS ISIR assumption/reject override	Reports students who have assumptions and/or rejects that have no respective overrides made to them or who have overrides made but no assumptions or rejects. Use this list to identify which students need to have assumption overrides applied manually. This report is not aid-year specific. Reporting Tool: SQR	**Financial Aid**, and then **File Management**, and then **ISIR Import**, and then **CPS/FPS Reject/ Assumption Report**	RUNCNTL_FAISRJAS
FAMANFS2 DL Print Manifest Report Plus	Generates a PLUS loan manifest. Use after PLUS notes have been signed and received. Reporting Tool: SQR	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Print Manifest Report Plus**	RUNCTL_MANIFEST2
FAMANFS3 DL Print Manifest Report Staf	Generates a Stafford loan manifest. Use after MPNs have been signed and received. Reporting Tool: SQR	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Print Manifest Report Stafford**	RUNCTL_MANIFEST3
FAORIGRJ DL Rejected Origination Changes	Reports the origination change files the COD rejected. Run before you inbound the Origination Change Acknowledgement file. Reporting Tool: SQR	**Financial Aid**, and then **Loans**, and then **Direct Lending Management**, and then **Rejected Origination Changes**	RUN_CNTL_DL_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
FAPELLDV PELL Disbursement Validation Report	Reports students who have Pell Disbursement validation errors. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **PELL Validation Reports**, and then **PELL Disbt Validation report**	SFA_PELL_OBERR_RPT
FAPELLOV PELL Origination Validation Report	Reports students who have Pell Origination validation errors. Reporting Tool: Oracle BI Publisher	**Financial Aid**, and then **Pell Payment**, and then **PELL Validation Reports**, and then **PELL Orig Validation report**	SFA_PELL_OBERR_RPT
FATIVRTN Return of TIV Funds Report	Reports worksheet calculations, return of funds by school and student, institutional charges, number of days since the withdrawal date, and career totals. Reporting Tool: SQR	**Financial Aid**, and then **Return of Title IV Funds**, and then **Return of TIV Aid Report**	RUN_CNTL_FATIVRTN

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