

PeopleSoft 8 SP1 Financial Aid
Updates for CS Bundle #17
Regulatory Release 2 2007-2008

January 2007

Regulatory Release 2 2007-2008

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Regulatory Release 2 2007-2008

Note. This document is an update to the *PeopleSoft Financial Aid 8 SP1 PeopleBook*. It describes the Product Update Issue #656029 posted to Customer Connection in January 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

PeopleSoft Financial Aid 8 SP1 Bundle 16 includes the following essential updates for your 8 SP1 system:

- Updates to ISIR Corrections Processing.
- Changes to the National Student Loan Data System (NSLDS) load for 2007-2008.
- Updates to Verification 2007-2008.
- Annual Pell Schedules.
- Updates to Direct Lending.
- Updates to Direct Loan School Account Statement (DLSAS) message classes.
- ACG and SMART grants for 2007-2008.

Updates to ISIR Corrections Processing

This section discusses:

- Changes to ISIR processes.
- Changes to the menu.

Changes to ISIR Processes

You can now create 2007-2008 ISIR Correction and Signature files. In addition, updates to the ISIR load process reflect the final changes to the 2007-2008 ISIR file layout published in the Electronic Data Exchange for 2007-2008 published in December 2006. The ISIR message tables are updated with the comment codes and text for 2007-2008.

Note. Evaluate the delivered set of values on the ISIR Comments table for severity level and DB match use. You may want to adjust these values based on your institutional business practice. For example, review the level of importance that you assigned to the reject reasons and comment codes during setup to ensure that the action required by financial aid staff is applicable.

Changes to the Menu

The following navigation paths are removed from the menu:

- Administer Financial Aid, Exchange Financial Aid Data, Use, ISIR Susp Management 05/06
- Administer Financial Aid, Manage Need Analysis, Use2, ISIR Susp Management 05/06
- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Inbound Summary, Inbound ISIR Summary 05/06
- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Inbound Summary, ISIR Outbound Summary 05/06
- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Inbound Summary, ISIR Outbound Data 05/06

Changes to the NSLDS Load for 2007-2008

The NSLDS load process has been modified to accept the modified NSLDS Transfer Monitoring and Financial Aid History files that will be generated by NSLDS January 2007. The modified pages include:

- NSLDS Suspense Management
- NSLDS Change Review
- NSLDS Information
- NSLDS Overpayment Information
- NSLDS Detail
- NSLDS Pell
- NSLDS ACG
- NSLDS NSG

The NSLDS Alert File Report has been modified to display the new alert flags.

This section discusses how to:

- Review failed NSLDS records
- Use NSLDS change review
- Review NSLDS general aggregate information
- View NSLDS overpayment information
- View details of NSLDS aggregate data
- View NSLDS Pell grant details

- View NSLDS ACG grant details
- View NSLDS NSG grant details
- Review the NSLDS alerts

See Also

ACG and SMART award processing is described in ACG and SMART Grants for 2006-2007 on page 32.

Pages Used to Review and Process NSLDS Data

Page Name	Object Name	Navigation	Usage
NSLDS Suspend Management	NSLDS_SUSP_CNTRL	Administer Financial Aid, Exchange Financial Aid Data, Use, NSLDS Suspend Management, NSLDS Suspend Management	View NSLDS records that have been loaded into the staging tables by the FA Inbound process. This page is used primarily to review NSLDS records that have an error load status.
NSLDS Change Review	NSLDS_CHANGE_RVW	Administer Financial Aid, Exchange Financial Aid Data, Use, NSLDS Change Review	Review all NSLDS Alert file records that have been loaded into the NSLDS Inquiry application tables. Once the students NSLDS information has been reviewed by the financial aid staff, use the page to indicate that you have reviewed and resolved any student aid eligibility discrepancies.
NSLDS Information	NSLDS_GEN_AGGR	<ul style="list-style-type: none"> • Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS Information • Administer Financial Aid, Apply for Financial Aid, Inquire, NSLDS Inquiry, NSLDS Information • Administer Financial Aid, Manage Need Analysis, Inquire, NSLDS Inquiry, NSLDS Information • Administer Financial Aid, Process Loans, 	View error codes, change flags, MPN flags, and alert file flags.

		Inquire, NSLDS Loan Data, NSLDS Information	
NSLDS Overpayment Information	NSLDS_CONTACT_SEC	Click the Overpay link on the NSLDS Information page.	View overpayment and contact information for Pell, Perk, SEOG, ACG, and NSG.
(NSLDS Detail) Formerly the NSLDS Active Match page	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 Pell	NSLDS_PELL	<ul style="list-style-type: none"> • Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS Pell • Administer Financial Aid, Apply for Financial Aid, Inquire, NSLDS Inquiry, NSLDS Pell • Administer Financial Aid, Manage Need Analysis, Inquire, NSLDS Inquiry, NSLDS Pell • Administer Financial Aid, Process Loans, Inquire, NSLDS Loan Data, NSLDS Pell 	Review a summary of a student's last three Pell awards.
NSLDS ACG	NSLDS_ACG	<ul style="list-style-type: none"> • Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS ACG • Administer Financial Aid, Apply for Financial Aid, Inquire, NSLDS Inquiry, NSLDS ACG • Administer Financial Aid, Manage Need Analysis, Inquire, NSLDS Inquiry, NSLDS ACG • Administer Financial Aid, Process Loans, 	View details for Academic Competitiveness Grants.

		Inquire, NSLDS Loan Data, NSLDS ACG	
NSLDS NSG	NSLDS_NSG	<ul style="list-style-type: none"> • Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS NSG • Administer Financial Aid, Apply for Financial Aid, Inquire, NSLDS Inquiry, NSLDS NSG • Administer Financial Aid, Manage Need Analysis, Inquire, NSLDS Inquiry, NSLDS NSG • Administer Financial Aid, Process Loans, Inquire, NSLDS Loan Data, NSLDS NSG 	View details for National SMART Grants.
NSLDS Alert File Report	RUNCNTL_FA924	Administer Financial Aid, Exchange Financial Aid Data, Reports, NSLDS Alert File Report	Generate a printed copy of students who have been reported by NSLDS with changed data.

Reviewing Failed NSLDS Records

Access the NSLDS Suspense Management page.

[Home](#) > [Administer Financial Aid](#) > [Exchange Financial Aid Data](#) > [Use](#) > **NSLDS Suspense Management**

NSLDS Suspense Management

EC Transaction ID:	TRALRTOP	EC Queue Instance:	1	NSLDS Header Nbr:	1
Social Security #:	078-68-7700	Pell Change Flag:			N
Last Name:	GOODRICH	Loan Change Flag:			N
First Name:	WILLIAM	Aggregate Change Flag:			Y
EmpID:	FA0279	ACG Change Flag:			
NSLDS Date of Birth:	05/06/1975	NSG Change Flag:			
Inform Last Name:	CLENLEY	<div style="border: 1px solid #ccc; padding: 5px;"> Load Status <input type="radio"/> Not Processed <input checked="" type="radio"/> Processed <input type="radio"/> Error <input type="radio"/> Skip </div>			
Inform First Name:	ADRIAN				
Inform Date of Birth:	19780101				

[NSLDS Suspense Management page](#)

The new fields are listed here.

ACG Change Flag Indicates if there has been a change to ACG.

NSG Change Flag Indicates if there has been a change to NSG.

Using NSLDS Change Review

Access the NSLDS Change Review page.

[Home](#) > [Administer Financial Aid](#) > [Exchange Financial Aid Data](#) > [Use](#) > **NSLDS Change Review**

[New Window](#)

NSLDS Change Review

Reviewed	Queue Inst	EmplID	Name	Pell Change	ACG Change	NSG Change	Loan Change	Aggregate Change	1-7 of 7		
<input type="checkbox"/>	1	FA0273	Baker,Nikki	Y	Y	N	N	N	Awards	Loans	NSLDS
<input type="checkbox"/>	1	FA0274	Bingham,Christine	N			Y	Y	Awards	Loans	NSLDS
<input type="checkbox"/>	1	FA0275	Danticat,Eileen	N			Y	N	Awards	Loans	NSLDS
<input type="checkbox"/>	1	FA0276	Jaffe,Joan	N			Y	Y	Awards	Loans	NSLDS
<input type="checkbox"/>	1	FA0278	Gilberto,Samuel	N			Y	N	Awards	Loans	NSLDS
<input type="checkbox"/>	1	FA0279	Goodrich,William	N			N	Y	Awards	Loans	NSLDS
<input type="checkbox"/>	1	FA0289	Duboi,Joyce	N			N	Y	Awards	Loans	NSLDS

NSLDS Change Review

Students with changed NSLDS information are listed on the page. The financial aid staff reviews each file for possible modifications to the current financial aid eligibility. After the file is reviewed and the staff person selects the **Reviewed** check box, the system removes the student's information from the page. The change flag fields indicate what portion of the student's NSLDS data has been recently modified by NSLDS.

The changed and new fields are listed here.

ID	Indicates the student ID, formerly referred to as EmplID.
ACG Change	Indicates if there has been a change to ACG.
NSG Change	Indicates if there has been a change to NSG.

Reviewing NSLDS General Aggregate Information

Access the NSLDS Information page.

[Home](#) > [Administer Financial Aid](#) > [Package and Disburse Aid](#) > [Inquire 2](#) > **NSLDS Inquiry**

[New Window](#)

NSLDS Information		NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS Additional Information
Timothy Balstarub		ID: 0042046				
Last Updated:	01/05/2007	Last Effseq:	1	NSLDS Transaction Nbr:	1	
SSN:	866-91-8899	NSLDS Transaction Source:	ISIR	Overpayment Information		

NSLDS Post-Screening Code(s):

Aggregate Data		View All		First	1 of 1	Last	
Eff Date:	01/05/2007	Seq:	1	NSLDS Txn Nbr:	1	NSLDS Transaction Source:	ISIR Detail
Transaction		FFELP / FDLP					
Process Date:	09/03/2006	Subsidized	UnSub	Unallocated	Combined		
Discharged:	None	Aggregate:	\$21013	\$42167	\$0	\$42167	
Default:	N	Pending Disb:	\$1237	\$1697		\$2934	
Active Bankruptcy:	N	Total:	\$22250	\$22851	\$0	\$45101	
Satisfactory Repayment:	N						
Fraud:	N						
Other							
Perkins Principal Balance:	\$3000	Perkins Current Year Loan Amount:	\$0				
PLUS Outstanding Balance:	\$0	PLUS Total:	\$0				
Grad PLUS Outstanding Balance:	\$0	Grad PLUS Total:	\$0				
Consolidation Outstanding Balance:	\$0	Consolidation Total:	\$0				

NSLDS Information page

The changed and new fields are listed here.

Overpayment Information A link to NSLDS overpayment details is displayed when federal overpayment information exists.

Transaction

Fraud This field identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.

Other

The **Perkins** group box title has been changed to **Other**.

Grad PLUS Outstanding Balance This field identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.

Grad PLUS Total This field displays the total loan amount of graduate PLUS loans borrowed by the student.

Viewing NSLDS Overpayment Information

Access the NSLDS Overpayment Information page.

[Home](#) > [Administer Financial Aid](#) > [Package and Disburse Aid](#) > [Inquire 2](#) > **NSLDS Inquiry**

NSLDS Overpayment Information

Contact Information			
Pell Ovrpy:	N	NSLDS Pell Overpay Contact:	N/A
Perk Ovrpy:	N	NSLDS Perkins Overpay Contact:	N/A
SEOG Ovrpy:	W	NSLDS SEOG Overpay Contact:	N/A
ACG Overpay:	W	ACG Overpayment Contact:	N/A
NSG Overpay:	N	NSG Overpayment Contact:	N/A

[Return](#)

NSLDS Overpayment Information

The new fields are listed here.

ACG Overpay

ACG overpayment. The valid values are:

F: Indicates fraud designated through an overpayment

Y: Yes, an active overpayment exists.

S: Yes, the student has an overpayment, but has made satisfactory arrangements for repayment.

N: N/A.

D: Deferred.

W: Waived.

ACG Overpayment Contact

Contact agency for the ACG overpayment. Either the federal ID code of the agency or *N/A* is displayed.

NSG Overpay

NSG overpayment. The valid values are:

F: Indicates fraud designated through an overpayment

Y: Yes, an active overpayment exists.

S: Yes, the student has an overpayment, but has made satisfactory arrangements for repayment.

N: N/A.

D: Deferred.

W: Waived.

NSG Overpayment Contact

Contact agency for the NSG overpayment. Either the federal ID code of the agency or *N/A* is displayed.

Viewing Details of NSLDS Aggregate Data

Access the detail page, formerly the NSLDS Active Match page.

[Home](#) > [Administer Financial Aid](#) > [Package and Disburse Aid](#) > [Inquire 2](#) > **NSLDS Inquiry**

NSLDS Activity			
Additional Pell:	N	Additional Loans:	Y
Additional ACG:	Y	Additional NSG:	N
NSLDS Active Match:			
Change Flags			
NSLDS Default Ln Chg:	N	NSLDS Overpymnt Chg:	N
NSLDS Dschrgd Ln Chg:	N	NSLDS Aggr Loan Chg:	N
NSLDS Satsfctry Rpymnt Chg:	N	NSLDS Perkins Chg:	N
NSLDS Actv Bnrkptcy Chg:	N	NSLDS Pell Pymnt Chg:	N
Loan Limit Flags			
NSLDS Sub Limit Exceeded:		NSLDS Combo Limit Exceeded:	
ISIR Sub Limit Flag:	N	ISIR Combo Limit Flag:	N
DL Plus Master-Prom Note Flag			
DL Staff Master-Prom Note Flag:	U	Unavailable	
DL Plus Master-Prom Note Flag:	N	No MPN on file	
DL Grad Plus MPN Flg:	A	Active	
NSLDS Alert File Flags			
Aggregate Change Flag:		Loan Change Flag:	
ACG Change Flag:	N	NSG Change Flag:	N
Pell Change Flag:			

[Return](#)

[Detail page for Aggregate Data](#)




The new fields in the **NSLDS Alert File Flags** group box are listed here.

ACG Change Flag	Indicates that a change to the student's ACG data has occurred in the current NSLDS data.
NSG Change Flag	Indicates that a change to the student's NSG data has occurred in the current NSLDS data.

Viewing NSLDS Pell Grant Details

Access the NSLDS Pell page.

[Home](#) > [Administer Financial Aid](#) > [Package and Disburse Aid](#) > [Inquire 2](#) > [NSLDS Inquiry](#)

NSLDS Information	NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS Additional Information
Timothy Balstarub		ID: 0042046			
SSN: 866-91-8899	NSLDS DOB:	Last Updated: 01/05/2007	Last Effseq: 1	  	
Aggregate Data			View All First 1 of 1 Last		
Eff Date: 01/05/2007	Seq: 1	NSLDS Txn Nbr: 1	NSLDS Transaction Source: ISIR	Detail	
NSLDS Pell Information			View All First 1 of 3 Last		
Pell Seq: 1	Pell Txn Nbr: 01	Pell Updt: 07/12/2001	Pell Pd to Dt: \$1750		
Pell Sched Amt: \$3400		Posted to COD:	Pell Prcnt Used: 0.0050		
Pell Schl Cd: 00131500	UNIVERSITY OF CALIFORNIA (UCLA)		NSLDS Pell Verf: VER		
Pell Award Amt: \$3400		NSLDS EFC: 000120	Pell Change Flag:		
Pell Payment Period Limit:					




NSLDS Pell page

The new field for 2007-2008 is **Pell Payment Period Limit**, which lists the payment period limit for Pell grants.

Viewing NSLDS ACG Grant Details

Access the NSLDS ACG page.

[Home](#) > [Administer Financial Aid](#) > [Package and Disburse Aid](#) > [Inquire 2](#) > [NSLDS Inquiry](#)

NSLDS Information	NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS Additional Information
Timothy Balstarub		ID: 0042046			
SSN: 866-91-8899	NSLDS DOB:	Last Updated: 01/05/2007	Last Effseq: 1	  	
Aggregate Data			View All First 1 of 1 Last		
Eff Date: 01/05/2007	Seq: 1	NSLDS Txn Nbr: 1	NSLDS Transaction Source: ISIR	Detail	
Academic Competitiveness Grant Information			View All First 1 of 3 Last		
Sequence: 1	Transaction Nbr: 10	Last Update: 08/29/2006			
School Code: 00392300	University Of Wisc-River Falls	School Year: 6			
Award Amount: \$54321	Paid to Date: \$4321	Sequence Code: 555			
Eligibility Code: 03	Posted to COD:	ACG Change:			
High School Prog: AB1147	Award ID:				

NSLDS ACG page




The fields in the **Academic Competitiveness Grant Information** group box are listed here.

Sequence	Sequential key value assigned by the NSLDS load process.
Transaction Nbr (transaction number)	Transaction number on the SAR or ISIR for the payment accepted by the school.
Last Update	Last reported update to the grant record maintained by NSLDS.
School Code	An 8-digit ED OPE Code used to identify the school and branch attended by the student with the Grant. Last two digits equal 00 if there is no branch code.
School Year	Indicates the student's grade level for ACG and SMART grants.
Award Amount	Accepted origination amount.
Paid to Date	The amount of the Federal Grant the school has disbursed to the student.
Sequence Code	Identifying sequence number from the Award ID for ACG and SMART grants.
Eligibility Code	Indicates the eligibility payment code for ACG grant.
Posted to COD	Date disbursement was posted to the COD system. Format is CCYYMMDD.
ACG Change	Indicates change to this Academic Competitiveness Grant record in the current transaction, either <i>Y</i> or <i>N</i> .
High School Prog (high school program code)	Indicates the high school program code for ACG grant.
Award ID	Award ID is provided by COD and consists of: <ul style="list-style-type: none"> • SSN (9 characters) • Award Type (ACG = A) • Award Year (2 characters) • Pell School ID (6 characters) • Award Sequence Number (3 characters)

Viewing NSLDS NSG Grant Details

Access the NSLDS NSG page.

[Home](#) > [Administer Financial Aid](#) > [Package and Disburse Aid](#) > [Inquire 2](#) > **NSLDS Inquiry**

NSLDS Information	NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS Additional Information
Timothy Balstarub		ID: 0042046			
SSN: 866-91-8899	NSLDS DOB:	Last Updated: 01/05/2007	Last Effseq: 1	  	
Aggregate Data View All First 1 of 1 Last					
Eff Date: 01/05/2007	Seq: 1	NSLDS Txn Nbr: 1	NSLDS Transaction Source: ISIR Detail		
National SMART Grant Information View All First 1 of 3 Last					
Sequence: 1	Transaction Nbr: 40	Last Update: 09/01/2006			
School Code: 00121800	Loma Linda University	School Year: 1			
Award Amount: \$100050	Paid to Date: \$105050	Sequence Code: 100			
Instructional Program Code: 9876543	Posted to COD:	NSG Change:			
Award ID:					

NSLDS NSG page

The fields on the NSLDS NSG page are the same as fields on the NSLDS ACG page with the following exceptions.

Instructional Program Code Indicates a student's major course of study; the Classification of Instructional Programs (CIP) designated code for SMART grants.

NSG Change Indicates change to this National Smart Grant record in the current transaction, either Y or N.

Award ID The Award ID is provided by COD and consists of:

- SSN (9 characters)
- Award Type (NSG = T)
- Award Year (2 characters)
- Pell School ID (6 characters)
- Award Sequence Number (3 characters)

Reviewing the NSLDS Alerts

Access the NSLDS Alert File Report.



Report ID: FA924

NSLDS Alert File Report

Page No. 1
Run Date 12/26/06
Run Time 6:17:10 PM

<u>EMPLID</u>	<u>Last Name</u>	<u>First Name</u>	<u>Offer Amount</u>
<u>Item Type</u>	<u>Description</u>		
Transaction ID:	TRALRTOP	Queue Instance:	4
		Header Number:	1
FA0274	BINGHAM	CHRITINE	
NSLDS Change Flags:	Pell: N ACG:	NSG: Loan: Y	Aggregate: Y
			0.00
FA0276	JAFFE	JOAN	
NSLDS Change Flags:	Pell: N ACG:	NSG: Loan: Y	Aggregate: Y
			0.00
FA0289	DUBOI	JOYCE	
NSLDS Change Flags:	Pell: N ACG:	NSG: Loan: N	Aggregate: Y
			0.00

NSLDS Alert File Report

The ACG and NSG change flag fields have been added to this report.

Updates to Verification 2007-2008

This section includes updates and modifications for verification processing based on 2006 tax forms and schedules. It includes updates to pages and components for the addition of Manage 2006-2007 Verification to the menu. It discusses:

- Changes to tax forms and pages.
- Changes to the menu.

Changes to Tax Forms and Pages

This section describes the changes to pages that changed for students who file forms 1040, 1040 A, and 1040 EZ.

In addition to the changes in fields on various pages, The **Other Taxable Income** link is now hidden on the Tax Form Data page when *1040EZ* is selected for the **Tax Form** field.

Pages Used to Verify Tax Information

Note. Only pages that are impacted by the changes are listed in the following table. The list does not include all of the pages used to verify tax information.

Page Name	Object Name	Navigation	Usage
Tax Form Data	VERIF04_FORM2	Administer Financial Aid, Manage Need Analysis, Use, Appl Data Verification, Tax Form Data	Enter information reported on the filer's tax form.
Income Adjustments	SFA_INCOME_ADJ_08	Click the Income Adjustments link on the Tax Form Data page.	Record 1040 or 1040A 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 Worksheet A totals.
Tax, Credits and Payments	SFA_TAXCREDIT_08	Click the Tax, Credits, and Payments link on the Tax Form Data page	Enter or view tax and credit data. Field activation in this page depends on the tax form filed. Taxable income is entered from 1040 line 43, 1040A line 27, 1040EZ line 6. Tax is entered from 1040 line 44, 1040A line 28, 1040EZ line 11. All credits entered are subtracted from the tax amount. The net calculated amount writes to Tax Form Data - US Income Tax Paid.
Other Taxable Income	SFA_OTHER_INC2_05	Click the Other Taxable Income button on the Tax Form Data page.	Record 1040A or 1040 tax line items for taxable income other than wages. Entries recorded here can affect totals to Worksheet A.
Untaxed Income	VERIF04_UNTAXED_EZ	Click the Untaxed Income link on the Tax Form Data page.	Enter or view information about income that is not taxed. Fields unavailable for entry indicate that the values originate from Other Taxed Income or Income Adjustments. Values entered here are written to the Untaxed Income field on the Tax Form Data page and can affect Worksheet A totals.

Changes to Income Adjustments

Changes have been made for income adjustments when filing a 1040, 1040A, or 1040EZ form.

Changes to Income Adjustments for Form 1040

Access the Income Adjustments page for a 1040 filer.

Income Adjustments

Archer MSA deduction:	<input type="text" value="0"/>
Certain business expenses:	<input type="text" value="0"/>
Health savings account:	<input type="text" value="0"/>
Moving expenses:	<input type="text" value="0"/>
One-half self-employment tax:	<input type="text" value="0"/>
Keogh and Self-Empl Plans Ded:	<input type="text" value="0"/>
SE health insurance deduction:	<input type="text" value="0"/>
Penalty on early w/d of Saving:	<input type="text" value="0"/>
Alimony paid:	<input type="text" value="0"/>
Filer's IRA deduction:	<input type="text" value="0"/>
Student loan interest:	<input type="text" value="0"/>
Jury duty pay given employer:	<input type="text" value="0"/>
Domestic production activities:	<input type="text" value="0"/>
Income Adjustments:	<input type="text" value="0"/>

[Income Adjustments page for a 1040 filer](#)

The following fields were removed from the Income Adjustments page:

- **Educator expenses**
- **Tuition and fees deduction**

The following fields were added to the Income Adjustments page:

- **Archer MSA deduction**
- **Jury duty pay given employer**

Changes to Income Adjustments for Form 1040A

Access the Income Adjustments page for 1040A.

Income Adjustments

Penalty on early w/d of Saving:	<input type="text" value="0"/>
Filer's IRA deduction:	<input type="text" value="0"/>
Student loan interest:	<input type="text" value="0"/>
Jury duty pay given employer:	<input type="text" value="0"/>
Income Adjustments:	<input type="text" value="0"/>

[Income Adjustments page for Form 1040A](#)

The following fields were removed from the Income Adjustments page:

- **Educator expenses**
- **Tuition and fees deduction**

The following fields were added to the Income Adjustments page:

- **Penalty on early w/d of Saving**
- **Jury duty pay given employer**

Changes to Income Adjustments for Form 1040EZ

Access the Tax Form Data page.

Household Info | **Tax Form Data** | W-2 Form | Worksheet A | Worksheet B | Worksheet C | Tax Data Consolidation

Mcchristy,Thomas A ID: FA0602
Aid Year: 2008 Institution: PSUNV

View All First 1 of 1 Last

Student Spouse Father Mother Other/Step Sequence: 1

Filing Information

Tax Return Filed?	<input type="text"/>
Tax Form:	1040EZ
Eligible For 1040A or 1040EZ?	<input type="text"/>
Marital Status:	<input type="text"/>
Filing Status:	<input type="text"/>
Dependents:	<input type="text"/>
Number of exemptions:	<input type="text"/>

Wages:	<input type="text" value="0"/>	Student/Spouse Wages
Total Other Income:	<input type="text" value="0"/>	
Income Adjustments:	<input type="text" value="0"/>	
Adjusted Gross Income:	<input type="text" value="0"/>	
U.S. Income Tax Paid:	<input type="text" value="0"/>	Tax, Credits, and Payments
Untaxed Income:	<input type="text" value="0"/>	Untaxed Income
<input type="checkbox"/> Special Circumstances		

Tax Form Data page for a 1040EZ filer

Enter the bottomline income adjustment for a 1040EZ filer. The sub page for income adjustments has been removed for 1040EZ filers.

Changes to Tax Credits

Changes have been made for tax credits when filing a 1040, 1040A, or 1040EZ form.

Changes to Tax Credits for Form 1040

Access the Tax, Credits and Payments page for a 1040 filer.

Tax, Credits and Payments

Tax, Credits, and Payments	
Taxable Income:	<input type="text" value="0"/>
Tax:	<input type="text" value="0"/>
Alternative minimum tax:	<input type="text" value="0"/>
<hr/>	
Foreign tax credit:	<input type="text" value="0"/>
Credit for child/dependent care:	<input type="text" value="0"/>
Credit for the elderly or disabled:	<input type="text" value="0"/>
Education credit:	<input type="text" value="0"/>
Retirement savings credit:	<input type="text" value="0"/>
Child tax credit:	<input type="text" value="0"/>
Residential Energy credits:	<input type="text" value="0"/>
Forms 8396/8839/8859:	<input type="text" value="0"/>
Other credits:	<input type="text" value="0"/>
<hr/>	
Total Credits:	<input type="text" value="0"/>
<hr/>	
U. S. Tax Paid:	<input type="text" value="0"/>
<hr/>	
Earned Income Credit:	<input type="text" value="0"/>
Additional Child Tax Credit:	<input type="text" value="0"/>

[Tax, Credit and Payments page for a 1040 filer](#)

The **Adoption Credit** field was removed and the **Residential Energy credits** field was added.

The **Forms 8396/8859** field was changed to **Forms 8396/8839/8859**.

Changes to Tax Credits for Form 1040A

Access the Tax, Credits and Payments page for a 1040A filer.

Tax, Credits and Payments

Tax, Credits, and Payments	
Taxable Income:	<input type="text" value="0"/>
Tax:	<input type="text" value="0"/>
Alternative minimum tax:	<input type="text" value="0"/>
<hr/>	
Credit for child/dependent care:	<input type="text" value="0"/>
Credit for the elderly or disabled:	<input type="text" value="0"/>
Education credit:	<input type="text" value="0"/>
Retirement savings credit:	<input type="text" value="0"/>
Child tax credit:	<input type="text" value="0"/>
<hr/>	
Total Credits:	<input type="text" value="0"/>
<hr/>	
U. S. Tax Paid:	<input type="text" value="0"/>
<hr/>	
Earned Income Credit:	<input type="text" value="0"/>
Additional Child Tax Credit:	<input type="text" value="0"/>

[Tax, Credits and Payments page for a 1040A filer](#)

The **Adoption credit** field has been removed.

Changes to Tax Credits for Form 1040EZ

Access the Tax, Credits and Payments page for a 1040EZ filer.

Tax, Credits and Payments

Tax, Credits, and Payments	
Taxable Income:	<input type="text" value="0"/>
Tax:	<input type="text" value="0"/>
<hr/>	
Earned Income Credit:	<input type="text" value="0"/>
U. S. Tax Paid:	<input type="text" value="0"/>

[Tax, Credits and Payments page for a 1040EZ filer](#)

Changes to Untaxed Income for Form 1040EZ

Access the Untaxed Income page for a 1040EZ filer.

Untaxed Income

AFDC Benefits:	<input type="text" value="0"/>	Tax-deferred Pension/Savings:	<input type="text" value="0"/>
Child Support Received:	<input type="text" value="0"/>	Tax-deferred Med/Dep Care Pmts:	<input type="text" value="0"/>
Living Allowance:	<input type="text" value="0"/>	Foreign Income Exclusions:	<input type="text" value="0"/>
Other Untaxed:	<input type="text" value="0"/>		

[Untaxed Income page for a 1040EZ filer](#)

The following fields have been removed from the Untaxed Income page for the 1040EZ filer because they do not apply to 1040EZ filers:

- Untaxed SS Benefits
- Earned Income Credit
- Tax Exempt Interest Income
- Additional Child Tax Credit
- Filer's IRA deduction

- Untaxed IRA Distributions
- Untaxed Pension

Changes to the Menu

Appl Data Verification 04/05 is located in Administer Financial Aid, Financial Aid History, App Info, Historical Application Info, Application Data Verification.

Appl Data Verification 07/08 is located in Administer Financial Aid, Manage Need Analysis, Use.

Annual Pell Schedules

As of publication of this bundle, the Department of Education (ED) has not yet published the Regular and Alternate Payment and Disbursements schedules for determining Federal Pell Grant awards for the 2007-2008 award year, July 1, 2007, to June 30, 2008. However, with this release, PeopleSoft provides you with the ability to calculate an estimated Pell Grant award in the 2008 Aid Year based on the current 2006-2007 Pell schedules. We anticipate releasing the official 2007-2008 schedules as part of Bundle 18 in April 2007.

To package students in 2008 with an estimated Pell award based on the 2006-2007 schedules, you must verify that the following areas of the 2008 setup support the 2007 amount of 4,050.00 USD:

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

After you complete the setup, the system will use the 2006-2007 Federal Pell Grant Program Payment and Disbursement Schedules to award the students up to a maximum of 4,050.00 USD based on eligibility.

Updates to Direct Lending

Updates to Direct Lending include the:

- Addition of the **PreProfessional Coursework Eligible** check box to the Application Misc Data page.
- Display of the **MPN Expiration Date** and **PreProfessional Coursework indicator** fields on the COD Award page.

This section discusses how to:

- Set up student eligibility.
- View COD award data.

Note: Do not send 2007-2008 DL-COD transactions until after April 14, 2007. After April 14, 2007, the COD System will use the Disbursement Date on the earliest dated actual disbursement, regardless of disbursement number, to confirm the appropriate Origination Fee Percent was submitted with Sub/Unsub originations, regardless of the award year.

See Also

For information on basic Direct Lending origination, change, and disbursement processes, see the *PeopleSoft Enterprise Financial Aid 8.0 PeopleBook*.

Setting Up Student Eligibility

This section discusses how to set up student eligibility for preprofessional coursework unsubsidized loans.

Page Used to Process and View Loan Change Transmission Information







Page Name	Object Name	Navigation	Usage
Application Misc Data (application miscellaneous data)	LOAN_ORIG_ELG_DL01	Administer Financial Aid, Process Loans, Use, Direct Loan App, Application Misc Data	Process and review information pertaining to student eligibility, promissory note printing, and loan credit.

Setting Up PreProfessional Coursework Eligibility

Access the Application Misc Data page.

[Home](#) > [Administer Financial Aid](#) > [Process Loans](#) > [Use](#) > [Direct Loan App](#)

[New Window](#)

Application Bio/Demo	Application Misc Data	Application Financial	Application Acknowledgement
ID: FAIV0050	Doer,Haley E	Institution: PSUNV	
Career: UGRD	Undergraduate	Aid Year: 2007	  
Loan Type: DSUB	DIRECT SUBSIDIZED STAFFORD	Appl Seq: 1	Loan Status Summary
Student Eligibility			
Direct Lending Year: First Year,never attended	Depend Stat (Fed): Dependent		
<input type="checkbox"/> HEAL Eligible	<input type="checkbox"/> PreProfessional Coursework Eligible	<input type="checkbox"/> Additional Unsub Eligibility	
PNote Print Information			
Loan Destination Nbr: 38  DIRECT LENDING 2005	DL Disclosure Print: LOC 		
Loan Print Option: School Prints 	DL Pnote Unique ID:		
Loan Orig Ack Pnote Status:	DL MPN Expire Date:		
Loan Credit Information			
Loan Credit Eligibility:	Loan Credit Decision Dt:		
Loan Credit Override: <input type="checkbox"/>	Loan Endorser Amount:		

Application Misc Data page

In the **Student Eligibility** group box, select the **PreProfessional Coursework Eligible** check box if the student is eligible for an additional preprofessional coursework unsubsidized loan amount. This is valid only on unsubsidized loans. Because the value is not derived from any field, you must manually select the check box.

Viewing COD Award Data

This section discusses how to view a student's award information, including the MPN expiration date and the preprofessional coursework indicator.

Page Used to Review COD Award Data

Page Name	Object Name	Navigation	Usage
COD Award	COD_AWARD	<ul style="list-style-type: none"> Administer Financial Aid, Process Pell Payment, Inquire, Common Orig and Disb, COD Award Administer Financial Aid, Process Loans, Inquire 2, Common Orig and disb, COD Award 	View a student's award information.

Reviewing the COD Award Data

Access the COD Award page.

[Home](#) > [Administer Financial Aid](#) > [Process Pell Payment](#) > [Inquire](#) > [Common Orig and Disb](#)

[COD Document](#) [COD Summary](#) [COD School Information](#) [COD Student](#) [COD Award](#) [COD Disbursement](#)

COD Document ID: 2005-05-03T15:58:34.00001315 **Document Type:** **Processing Status:** P
Receipt Date: **Document Status:** **Process Date:**

ID: FAD0125 **Reporting School ID:** 001315 **Attending School ID:** 001315

Award Block [View All](#) First 1 of 2 Last

Award Year: 2004 **Award ID:** 539900728P04G01315001
Award Name: DLPLUS **Award Created Date:**
Award Number: 1 **Award Amount:**
CPS Transaction Number: 1 **Response Indicator:**
School Use: [Response Information](#)

Pell Information

Cost of Attendance: **Negative Pending Amount:**
Enrollment Date: **CPS Verification Indicator:**
Scheduled Pell Award: **Highest CPS Transaction:**
Total Eligibility Used:
Verification Status: **Academic Calendar:**
Secondary EFC Ind: **Payment Method:**
YTD Disb Amt: **Instructional Weeks Def:**
FSA Indicator: **Instructional Weeks Used:**
Low Tuition Ind: **Credit/Clock Hours in Award Yr:**
Incarcerated Ind: **Credit/Clock Hours in Pgm Yr:**

[COD Award page, page 1 of 2](#)

Loan Information

Loan Key: **Booked Loan Date:**
Dependency Override: **Booked Loan Amount:**
Default Overpay Code: **Award Amount Requested:**
Additional HPPA: **Payment to Servicer Amt:**
Electronic MPN Flag: **Payment to Servicer Date:**
MPN ID: **Credit Decision Status Date:**
MPN Status: **Credit Override Indicator:**
MPN Link Flag: **Credit Decision Status:**
MPN Expire Date: **Endorser Amount:**
[Additional Loan Information](#) [Borrower Information](#) **PreProfessional Coursewrk:**

Other Information

Federal Share Amount: **FISAP Income Override:**
Less than Full Time: **Grade Level:**

[COD Award page, page 2 of 2](#)

In the **Loan Information** group box, view the **MPN Expire Date** field and the **PreProfessional Coursework** indicator.

MPN Expire Date

Indicates the date when the MPN linked to this loan will expire. The COD system returns a value for this field.

PreProfessional Coursework

If the **PreProfessional Coursework Eligible** check box is selected on the Application Misc Data page, the value in this field is *true*.

Updates to DLSAS Message Classes

For aid year 2007-2008, the following fixed-length flat file messages classes are supported:

- DSDF08OP – Disbursement Level
- DSLF08OP – Loan Level

Note. Because the School Account Statement (SAS) report options are year-specific, you must update your report options and preferences each year to change the defaults. Ensure that you have the correct program year on the SAS Report Options page before updating your options.

See Also

Common Origination and Disbursement (COD) Technical References 2007-2008.

ACG and SMART Grants for 2006-2007

This section discusses the new functionality provided to enable COD reporting of Academic Competitiveness Grant (ACG) and Science and Mathematics Access to Retain Talent (SMART) awards for the 2006-2007 year:

The processes that originate ACG and SMART awards are similar to the Pell COD processes. Schools can generate messages in the common record format and then receive acknowledgement messages from the COD.

This section discusses how to:

- Set up ACG and SMART processing.
- Process ACG and SMART grants.
- Process special cases.

- Load grant eligibility information with an external file.

Setting Up ACG and SMART Processing

This section discusses how to setup the ACG and SMART grant reporting functionality.

Pages Used to Set Up ACG and SMART Grant Processing

Page Name	Object Name	Navigation	Usage
ACG/SMART Setup	SFA_ASG_SETUP	Administer Financial Aid, Process ACG/SMART Grants, Setup, ACG/SMART Setup	Set up the processing options for ACG and SMART grants.
Eligible CIP Codes for SMART	SFA_ASG_CIP_CODE	Administer Financial Aid, Process ACG/SMART Grants, Setup, Eligible CIP Codes for SMART	Maintain eligible CIP codes for SMART grants. Data is stored by aid year.
ACG State Program Codes	SFA_ASG_HS_PROGRAM	Administer Financial Aid, Process ACG/SMART Grants, Setup, Rigorous Programs of Study	Maintain list of eligible state high school program codes for ACG. Data is stored by aid year.
COD Edit Codes	SFA_COD_EDIT_CODE	Administer Financial Aid, Process ACG/SMART Grants, Setup, View COD Edit Codes	Maintain list of valid COD edit codes used by the grant components.

Setting Up ACG/SMART Processing Options

Access the ACG/SMART Setup page.

ACG/SMART Setup

Institution: PSUNV PeopleSoft University

Aid Year: 2007

Setup Options View All First 1 of 2 Last

*Reporting School Code: PeopleSoft University

Disbursement Offset: Originate Offered Awards

Disb Prior to Transmitting

ACG/SMART Setup

Reporting School Code

Select the owning school code used for Pell.

Disbursement Offset

Enter the number of days from the scheduled disbursement date that can be used to select disbursement records for reporting to COD. To select disbursement records prior to the scheduled date, use a negative signed number.

Originate Offered Awards

Select to include ACG and SMART awards in offered status for origination. If not selected, only grants with an accept status will be originated.

Disb Prior to Transmitting
(Disbursement Prior to Transmitting)

Select to restrict the reporting of disbursement information to COD until the individual disbursement has been paid to the student's account.

Viewing Eligible CIP Codes for SMART

Access the Eligible CIP Codes for SMART page.

Eligible CIP Codes for SMART		
Aid Year: 2007 Federal Aid Year 2006 - 2007		
		First ◀ 1-301 of 301 ▶ Last
*Code	Description	
01.0901	Animal Sciences, General	+ -
01.0902	Agricultural Animal Breeding	+ -
01.0903	Animal Health	+ -
01.0904	Animal Nutrition	+ -
01.0905	Dairy Science	+ -
01.0906	Livestock Management	+ -
01.0907	Poultry Science	+ -
01.0999	Animal Sciences, Other	+ -
01.1101	Plant Sciences, General	+ -
01.1102	Agronomy and Crop Science	+ -
01.1103	Horticultural Science	+ -
01.1104	Agricultural and Horticultural Plant Breeding	+ -
01.1105	Plant Protection and Integrated Pest Management	+ -
01.1106	Range Science and Management	+ -

Eligible CIP Codes for SMART page

The page displays all Classification of Instructional Program (CIP) codes that are eligible for SMART grants. The codes are set up by aid year and have already been populated for 2007.

Viewing the ACG State Program Codes

Access the ACG State Program Codes page.

ACG State Program Codes

Aid Year: 2007 Federal Aid Year 2006 - 2007

First 1-96 of 96 Last		
*Code	Description	
AL0001	Alabama Advanced Academic Endorsement	+ -
AL0002	High Schools That Work Award of Educational Achievement	+ -
AR0001	Arkansas Academic Challenge Core Curriculum	+ -
AR0002	Arkansas Coursework Option	+ -
AR6001	Arkansas State Scholars Initiative	+ -
AZ0001	Arizona Dual Credit Coursework Program	+ -
AZ6001	Arizona State Scholars Initiative	+ -
CA0001	California Golden State Seal Merit Diploma	+ -
CA0002	California A-G Requirements	+ -
CO0001	Colorado Higher Education Admission Requirements (HEAR)	+ -
CO6001	Colorado State Scholars Initiative	+ -
CT0001	Connecticut Technical High School System Program	+ -
CT0002	Connecticut Dual Enrollment Program	+ -
CT6001	Connecticut State Scholars Initiative	+ -
DD0001	Department of Defense Education Activity (DoDEA) Requirement	+ -
DE0001	Delaware Distinguished Achievement Diploma	+ -
DE0002	High Schools That Work Award of Educational Achievement	+ -
DE0003	Delaware Coursework Requirements	+ -

ACG State Program Codes

This page displays all state high school program codes that are eligible for ACG grants. The codes are set up by aid year and have already been populated for 2007.

Viewing COD Edit Codes and Messages

Access the COD Edit Codes page.

COD Edit Codes		
Aid Year: 2007 Federal Aid Year 2006 - 2007		
		First 1-130 of 130 Last
*Code	Description	
001	Invalid Destination Mailbox ID	+ -
002	Reporting Entity ID is not eligible to report	+ -
003	Duplicate Document ID	+ -
004	Entity ID (Source) not found on participant file	+ -
005	Full Participant schools cannot submit legacy records	+ -
006	Document create date greater than current system date	+ -
007	No detail records in document	+ -
008	Reported number of students does not equal detail count	+ -
011	No eligible SSN, DOB, and Last Name combination match on CPS for student	+ -
012	No eligible SSN, DOB, and Last Name combination match found on CPS for student (Last Name Match is on	+ -
013	Citizenship Status Indicator for PLUS Borrower is not eligible.	+ -
014	Citizenship Status is not eligible for this award	+ -
015	Corrected Value same as Original Value	+ -
016	PLUS Borrower and Student Cannot be the Same Person if the Award Year is prior to 2005-2006 AND the Stu	+ -

[COD Edit Codes page](#)

This page displays all COD edit messages for 2007. The codes and text will be displayed in the ACG/SMART origination pages.

Processing ACG and SMART Grants

This section includes an overview of ACG and SMART grant processing and discusses how to:

- Enter grant eligibility interface information.
- Originate ACG and SMART grants.
- View ACG/SMART processing records.
- Generate origination files for COD.
- Resolve ACG/SMART outbound errors.
- Process response data from COD.

Overview of ACG and SMART Grant Processing

The following steps give an overview of how schools process ACG and SMART grants.

1. Determine eligible students and awards using item types with **Federal ID** values of *ACG* and *SMART*.
2. Run the grant origination process (FAPASORG). The process creates an origination record for the student that can be viewed in the Manage ACG/Smart Grant component. Information entered in the Grant Eligibility Interface page for the student is used to originate the grant.
3. Ensure that grant eligibility criteria are provided to the origination record. This can be accomplished in one of these ways:
 - Enter the eligibility information in the record after origination.
 - Enter the eligibility information in the Grant Eligibility Interface component prior to origination.
 - Load a flat file of eligible grant recipients using the FA Inbound (Import Federal Data Files component) process, which loads the Grant Eligibility Interface page. See Loading Grant Eligibility Information with an External File on page 53.
4. Run the Generate ACG/SMART Outbound process (ASGOUT). This process populates the COD staging tables using data from the grant application tables. The process verifies that the required data is present before moving the data to the staging tables and then creates the common record XML file.
5. Transmit files to COD. Schools must assign the appropriate grant message class name.
6. Receive and process acknowledgement records. Run the Common Origination and Disbursement Inbound process (CODIN), which loads Common Records from the XML file into staging tables and then populates the grant origination tables using data from the COD staging table.
7. Manage adjustments. Adjustments to originated grants are automatically triggered if the award is modified. Adjustments can also be triggered manually from the Manage ACG/Smart Grant component.

Pages Used to Process ACG and SMART Grants

Page Name	Object Name	Navigation	Usage
Grant Eligibility Interface	SFA_ASG_ORGDFLT	Administer Financial Aid, Process ACG/SMART Grants, Use, Grant Eligibility Interface	Store student grant eligibility criteria information that is used by the origination process.
Process ACG/SMART Grants	SFA_RUN_ASG_ORG	Administer Financial Aid, Process ACG/SMART Grants, Process, ACG/SMART Origination	Originate ACG and SMART records.
Origination	SFS_ASG_ORIG	Administer Financial Aid, Process ACG/SMART Grants, Use, Manage ACG/SMART Grants	View and modify originated ACG and SMART records.
ACG/SMART Grants Origination Action Detail	SFA_ASG_ORIG_SEC	Click the Orig Status link on the Origination page.	View origination level action transactions. COD document data and COD edit messages can be viewed from this page.
ACG/SMART Grants Origination Messages	SFA_ASG_ORGMSG_SEC	Click the Message link on the ACG/SMART Grants Origination Action Detail page.	View award level messages.
Disbursement	SFA_ASG_DISB	Administer Financial Aid, Process ACG/SMART Grants, Use, Manage ACG/SMART Grants, Disbursement	View disbursement level information of the originated grant record.
ACG/SMART Grants Disbursement Action Detail	SFA_ASG_DISB_SEC	Click the Action Detail link on the Disbursement page.	View disbursement level action transactions. COD edit messages can be viewed from this page.
ACG/SMART Grants Disbursement Messages	SFA_ASG_DSBMSG_SEC	Click the Message link on the ACG/SMART Grants Disbursement Action Detail page.	View disbursement level messages.
COD ACG/SMART Outbound	SFA_RUNCTL_AS_OUT	Administer Financial Aid, Process ACG/SMART Grants, Process, ACG/SMART Outbound	Generate outbound common origination records for transmission to COD.
COD Document	SFA_COD_DOCUMENT	Administer Financial Aid, Process ACG/SMART Grants, Inquire, Common Origination and Disbursement	View COD data stored in the COD staging tables.
ACG/SMART Inbound	SFA_RUNCTL_COD_INB	Administer Financial Aid, Process ACG/SMART Grants, Process, ACG/SMART Inbound	Load and process COD response XML files.

Entering Grant Eligibility Interface Information

Access the Grant Eligibility Interface page.

Grant Eligibility Interface

Kuhn,Tricia G

ID: 0041002

Origination Defaults			
ACG Eligibility Reason:	HS Prog	SMART Eligible CIP Code:	<input type="text"/>
Rigorous High School Program:	LA0002	Student Level:	1st year

Grant Eligibility Interface page

Use the Grant Eligibility Interface page to enter student eligibility criteria met by the student awarded ACG or SMART before grant origination record is created. After origination, the data entered in this page is moved into the origination tables. If information is not entered for the student, an incomplete origination record is created and you enter the missing eligibility information using the Manage ACG/SMART Grants component.

Schools with many grant recipients can create an external file of their grant recipients and load it into this component.

Using this component is optional. Schools that have been documenting the eligibility criteria of their grant recipients might choose not to enter data in this component, wait until after the records are originated, and then enter the information before originating their grants.

ACG Eligibility Reason

Select the reason the student is eligible for ACG. The values are:

- *HS Prog* (high school program). Student has completed an eligible high school program accepted by the Department of Education.
- *AP/IB*. Student has completed advanced placement or international baccalaureate coursework with acceptable scores.
- *Course*. Student has completed the high school coursework necessary to satisfy the ACG curriculum requirements.

Rigorous High School Program

When the **ACG Eligibility Reason** value is *HS Prog*, you must provide the eligible program code.

SMART Eligible CIP Code

For SMART eligible students, select the qualifying CIP code assigned to the student.

Student Level

The student's academic level:

- 0 – First Year NA
- 1 - First year
- 2 - Second year
- 3 - Third year
- 4 - Fourth year

Originating ACG and SMART Grants

Access the Process ACG/SMART Grants run control page.

Process ACG/SMART Grants

Run Control ID: Grant

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

Run

Control Information	
*Institution:	PSUNV <input type="text"/>
*Aid Year:	2007 <input type="text"/>
*Reporting School Code:	001315 <input type="text"/>
<input checked="" type="checkbox"/> Student Override	
Student Override List	
View All First 1 of 1 Last	
ID:	FAIV0053 <input type="text"/> Latch,Evan H <input type="button" value="+"/> <input type="button" value="-"/>

Process ACG/SMART Grants**Run**

Click the **Run** button to run the origination process. The process selects records that meet the run control criteria and are awarded an ACG and SMART grant.

Institution

Select the academic institution of the records to be processed.

Aid Year

Select the aid year of the records to be processed.

Reporting School Code

Select the owning school code used for Pell.

Student Override

Select the check box to allow individual students to be selected for origination.

ID

Available when the **Student Override** check box is selected. Enter the EmplID of the individual records to originate. The records selected must meet the criteria defined on the page.

Viewing ACG/SMART Processing Records

The Manage ACG/SMART Grant component stores all ACG/SMART processing records. This section discusses how to view the following ACG/SMART grant records:




- Origination
- Origination action details
- Origination messages
- Disbursements
- Disbursement action details
- Disbursement messages

Viewing Origination Records

Access the Origination page.

Home > [Administer Financial Aid](#) > [Process ACG/SMART Grants](#) > [Use](#) > **Manage ACG/SMART Grants** [New Window](#)

Origination **Disbursement**

Locke, Kerry B **EmplID:** FAIV0047   

Aid Year: 2007 Financial Aid Year 2006-2007 **Institution:** PSUNV

Item Type: 900000000104 Federal SMART Grant (RTIV) **Career:** UGRD

Award ID: 606494447T07001315001 **Reporting School Code:** 001315

Grant Type: SMRT **Origination Status:** Transmitted 01/10/07 10:57:32AM

Update Origination [Orig Status](#) **COD Transmit Status:** Transmitted 01/10/07 10:57:38AM

First ◀ 1 of 1 ▶ Last

Seq	Trans Nbr	Award Amount	Student Lvl	Enrollment Date	Elig Reason Cd	HS Program Cd	Program CIP Cd	Citizenship Status
1	2	\$1300.00	3rd year	05/23/2006			01.0905	US Citizen

Origination page

After the record has been transmitted, the current row in the grid cannot be updated. The origination process can insert a new row by either modifying the student's award or checking the **Update Origination** check box.

Award ID Unique ID generated by the origination process.

Grant Type ACG or SMART.

Update Origination

Select to run the origination process again for the same award. Use when a non-award related change must be made to the originated record.

For award changes such as changes to the award amount or to the individual disbursement amounts, modify the award in the packaging components, which causes the origination process to select the record for adjustment.

Reporting School Code

The CPS School code used for COD reporting.

Origination Status

Displays the origination status when the system transmits records. Values are:

Accepted: Indicates an accepted acknowledgment record.

Canceled: Indicates a cancelled award from the system.

Change to Origination: Indicates that a change was made to the student's origination record. The origination program sets this status.

Corrected: Indicates an accepted record with corrections.

Originated: Indicates that the origination process ran successfully. This is also set manually for rejected records that are now ready to be processed.

Rejected: Indicates a rejected record.

COD Transmit Status

The transmission status of the record to COD. The values are normally assigned automatically as the grant is processed, but can be changed manually as needed.

The values are:

Review: Not used.

On Hold: Set when the rejected by COD. This must be reset to Ready to retransmit to COD.

Ready: Default status set after the record has been originated. This is also set manually for rejected records that are now ready to be processed.

Transmitted: Set once the COD message has been generated.

Cancel: Set when the origination status is set to Cancelled.

Seq (sequence)

Internal counter.

Trans Nbr (transaction number)

The transaction number of the current valid ISIR.

Award Amount	The total amount awarded for the award year for the item type.
Student Lvl (student level)	The student's academic level. The academic level must be valid for the specific grant program.
Enrollment Date	First day of enrollment for the award period.
Eligibility Reason Code	Select the reason that the student is eligible for ACG. This field can only be updated if the grant type is ACG. The values are: <i>HS Prog</i> – Student has completed an eligible high school program accepted by the Dept of Ed. <i>AP/IB</i> – Student has completed advanced placement or international baccalaureate coursework with acceptable scores. <i>Course</i> – Student has completed the high school coursework necessary to satisfy the ACG curriculum requirements.
HS Program Cd (high school program code)	When the Eligibility Reason Code is <i>HS Prog</i> , enter the appropriate High School program code. This field can only be updated if the grant type is ACG.
Program CIP Cd (program CIP code)	For SMART grants, the eligible CIP code must be provided. This field can only be updated if the grant type is SMART.
Citizenship Override	Use to inform COD that the student has been verified locally as a U.S. citizen. The only valid value accepted by COD for ACG and SMART grants is <i>US Citizen</i> .

Viewing ACG/SMART Grants Origination Action Details

Access the ACG/SMART Grants Origination Action Detail page.

ACG/SMART Grants Origination Action Detail				
Item Type: 900000000451 SMART Grant 2		Award Amount: 4000.00		
First ◀ 1-3 of 3 ▶ Last				
Seq	Origination Action	Date	Document ID	User ID
1	Originated	12/01/2006 4:11PM		Message PS
2	Origination Transmitted	12/01/2006 4:26PM	2006-12-01T16:26:42.6376543210	Message PS
3	Orig Acknowledgement Received	12/01/2006 4:43PM	2006-12-01T16:26:42.6376543210	Message PS

ACG/SMART Grants Origination Action Detail page

The page displays all actions that have occurred at the origination level.

Document ID Click this link to view the COD staging table data.

Message Click this link to view error messages generated by the grant processes or received from COD.

Viewing ACG/SMART Grants Origination Messages

Access the ACG/SMART Grants Origination Messages page.




ACG/SMART Grants Origination Messages		
Action Seq: 3	Action Code: Orig Ackn Rejected	Date: 12/04/2006 10:17AM
Document ID: 2006-12-04T10:06:59.7076543210		
First ◀ 1-2 of 2 ▶ Last		
Seq	Origination Action Message	
1	Incorrect Award Dates.	
2	Student not Pell eligible	



ACG/SMART Grants Origination Messages page

This example ACG/SMART Grants Origination Messages page shows messages received for a rejected origination record.

Viewing ACG/SMART Disbursements

Access the Disbursement page.

Origination		Disbursement	
Test4,Student		EmplID: FAASG004	  
Aid Year: 2007	Financial Aid Year 2006-2007	Institution: PSUNV	
Item Type: 900000000400	ACG GRANT	Career: UGRD	

First  1-2 of 2  Last							
Disbursement Detail		COD Info					
Disb ID	Seq Nbr	Disb Amt	Disb Dt	Disb Stat	Disb Stat Date	Award Period	Pmt Start Dt
01	1	\$650.00	08/20/2006	Originated	12/04/2006		08/30/2006
02	2	\$650.00	01/12/2007	Originated	12/04/2006		01/24/2007



Disbursement page

The Disbursement page displays disbursement level information of the originated grant.

Viewing ACG/SMART Grants Disbursement Action Details

Access the ACG/SMART Grants Disbursement Action Detail page.

ACG/SMART Grants Disbursement Action Detail							
Item Type: 900000000400		ACG GRANT		Disb ID: 01			
Disb Amt: 650.00				Disb Seq: 1			

First  1-3 of 3  Last					
Seq	Disbursement Action	Date	Document ID	Message	User ID
1	Originated	12/02/2006 11:33:06AM		Message	PS
2	Disbursement Transmitted	12/02/2006 12:20:38PM	2006-12-02T12:20:37.9776543210	Message	PS
3	Disbursement Acknowledged	12/02/2006 1:07:44PM	2006-12-02T12:20:37.9776543210	Message	PS

ACG/SMART Grants Disbursement Action Detail page

The page displays all actions that have occurred at the disbursement level.

Document ID

Click this link to view the COD staging table data.

Message

Click this link to view disbursement level messages generated by the grant processes or received from COD.

Viewing ACG/SMART Grants Disbursement Messages

Access the ACG/SMART Grants Disbursement Messages page.

ACG/SMART Grants Disbursement Messages

Action Seq: 3 **Action Code:** Disbursement Outbound Error **Date:** 11/02/2006 11:25:36AM

Document ID: 2006-11-02T11:21:31.2576543210

First ◀ 1 of 1 ▶ Last

Seq Disbursement Action Message

1	Disbursement not transmitted due to the Orig Status not being 'Transmitted', 'Accepted' or 'Changed' for the student.
---	---

[ACG/SMART Grants Disbursement Messages page](#)

This example ACG/SMART Grants Disbursement Messages page shows a message generated by the outbound process.

Generating Origination Files for COD

Access the ACG/SMART Outbound page.

ACG/SMART Outbound

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

Selection Criteria
First ◀ 1 of 1 ▶ Last

*Academic Institution:	<input type="text" value="PSUNV"/> <input type="button" value="Q"/> PeopleSoft University	<input checked="" type="checkbox"/>	Origination	<input type="button" value="+"/> <input type="button" value="-"/>
*Aid Year:	<input type="text" value="2007"/> <input type="button" value="Q"/> 2006-2007	<input type="checkbox"/>	Origination and Disbursement	
*Academic Career:	<input type="text" value="UGRD"/> <input type="button" value="Q"/>			
*SFA Common School ID:	<input type="text" value="76543210"/> <input type="button" value="Q"/>			
*Schema Version:	<input type="text" value="Ver 2.0"/> <input type="button" value="Q"/>			
*File Path and Name:	<input type="text" value="\\ENC-DYLAGAN\TEMP\ACG84.XML"/>			

ACG/SMART Outbound page

Before sending the files to COD, use the appropriate grant message class names for these files.

Run

Click the **Run** button to start the COD ACG/SMART Outbound (ASGOUT) process. This is a two-step PSJob:

- FAPASOUT selects all originated 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.
- SFA_COD_OUT creates the common record XML file in the location and name specified in the run control.

Academic Institution

Select the institution for which you want to create an XML file.

Aid Year

Enter the aid year of the records selected for processing.

Academic Career

Enter the academic career of the records selected for processing.

If left blank, all eligible academic careers are selected.

SFA Common School ID

Select your institution's identification number, the same number used for Pell reporting.

Schema Version	Select the valid schema version.
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.
Origination	Select to process origination outbound records.
Origination and Disbursement	Select to process disbursement outbound records. When you select this option, origination records are also processed.

Resolving ACG/SMART Outbound Errors

Similar to the Pell reporting process, the ACG/SMART outbound process can fail to generate an XML record. When an originated record fails the outbound process, an error message is displayed in the ACG/SMART Grants Origination Action Detail secondary page.

Two circumstances result in outbound errors:

- Award discrepancy
- Missing required information.

Award Discrepancies

When the current award accept amount is greater than the originated award amount, first determine which value is correct. If the packaged amount is correct, run the record through the origination process again to synchronize the award amounts.

Incomplete Required Information

If a required field is missing, there are fewer required data elements because COD will use data from the ISIR. Identify which originated records failed the ASGOUT process due to missing eligibility information by reviewing the message log for the FAPASOUT process.

Message Log			
Process			
Instance:	99	Process Type:	COBOL SQL
Name:	FAPASOUT	Description:	COD ACG/SMART Outbound
		View All	First ◀ 1-18 of 18 ▶ Last
Severity	Log Time	Message Text	Explain
10	3:07:55PM	FAPASOUT : Begin Execution at 15.07.55.440000 on 2006-12-04	Explain
10	3:07:55PM	FAPASOOR : Begin Execution at 15.07.55.700000 on 2006-12-04	Explain
10	3:07:55PM	FAPASOOR: One of more required fields are blank for ID=FAASG006, Institution=PSUNV, Aid Year=2007, Award ID=758910002S07001315001	Explain
10	3:07:55PM	FAPASOOR: One of more required fields are blank for ID=FAASG007, Institution=PSUNV, Aid Year=2007, Award ID=758910012S07001315001	Explain
10	3:07:55PM	FAPASOOR: Total Number of Records Read 2	Explain
10	3:07:56PM	FAPASOOR: Total Number of Records Processed 0	Explain
10	3:07:56PM	FAPASOOR : End Execution at 15.07.55.810000 on 2006-12-04	Explain

Message log for the FAPASOUT process

Review each record in the Manage ACG/SMART component.

Alternatively, you can identify these originated records by executing the following query:

```

SELECT
A.EMPLID,
A.SFA_ASG_GRANT_TYPE,
A.SFA_ASG_ORIG_STAT,
A.SFA_COD_TRANS_STAT,
B.SFA_ASG_ORIG_SEQ,
B.SFA_COD_STDNT_LVL,
B.SFA_COD_ELIGRSN_CD,
B.SFA_COD_HS_PROG_CD,
B.SFA_COD_PROGCIP_CD
FROM PS_SFA_ASG_ORG A, PS_SFA_ASG_ORG_DTL B
WHERE A.EMPLID = B.EMPLID AND
A.INSTITUTION = B.INSTITUTION AND
A.AID_YEAR = B.AID_YEAR AND
A.ACAD_CAREER = B.ACAD_CAREER AND
A.ITEM_TYPE = B.ITEM_TYPE AND
A.SFA_ASG_ORIG_STAT IN ('O','U') AND

```

A.SFA_COD_TRANS_STAT = 'R'

Check the following fields for missing information required for the grant type:

- SFA_COD_STDNT_LVL (student academic level)
- SFA_COD_ELIGRSN_CD (ACG eligibility reason)
- SFA_COD_HS_PROG_CD (ACG eligible high school program)
- SFA_COD_PROGCIP_CD (SMART eligible CIP code)

Enter this information in the Manage ACG/SMART Grants component. Rerun the ASGOUT process to generate the COD file.

Processing Response Data from COD

Use the same process for loading Pell and DL COD response files to load ACG and SMART COD response files.

Access the ACG/SMART Inbound run control page.

ACG/SMART Inbound

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

First ◀ 1-2 of 2 ▶ Last

***File Path and Name**

\\ENC-DYLAGAN\TEMP\ACG84RSP.XML	+ -
\\ENC-DYLAGAN\TEMP\ACG85RSP.XML	+ -

ACG/SMART Inbound run control page

The COD Inbound process (CODIN) is a two-step PSJob:

- SFA_COD_IN loads the XML file into the COD staging tables.
- FAPCODIN updates the origination record with the response data. The status of the grant is updated based on the contents of the response data.

Processing Special Cases

With the installation of the grant reporting functionality in this bundle, all COD common record files generated, including Pell and Direct Lending, will be in the latest schema version 2.0e.

In cases where a student's grant eligibility increases mid year due to the student advancing a grade level, use a separate item type for each grade level amount. This is necessary because COD will not accept more than one grade level for the same origination record; separate origination records will be reported.

Resolving Origination Records Rejected by COD

If an origination record is rejected, processing the acknowledgement record from COD sets the **Origination Status** to *Rejected* and the **COD Transmit Status** to *On Hold*.

To resolve, first determine the reasons the record was rejected by reviewing any origination or disbursement level messages received from COD. Next, make any necessary changes to the student's data to correct the problem:

- If the correction requires a change to the student's eligibility information, such as student level, ACG eligibility reason code, HS program code, or CIP code, make the changes and update the **Origination Status** from *Rejected* to *Originated* and reset the **COD Transmit Status** from *On-Hold* to *Ready*. When the ACG/SMART Outbound process runs, the record will be re-transmitted.
- If the correction requires a change in the award or disbursement amounts, the record must be re-originated. First, update the student's award. The award will be flagged for adjustment processing; similar to loan processing, the offer activity indicator field for the award gets reset. Next, update the **Origination Status** from *Rejected* to *Originated* and reset the **COD Transmit Status** from *On-Hold* to *Ready* and run the origination process. Run the ACG/SMART Outbound process to generate the new file.

Origination		Disbursement					
Test4_Student		EmpID:	FAASG004				
Aid Year:	2007 Financial Aid Year 2006-2007	Institution:	PSUNV				
Item Type:	900000000400 ACG GRANT	Career:	UGRD				
Award ID:	758910031A07001315001	Reporting School Code:	001315				
Grant Type:	ACG	Origination Status:	Rejected 12/04/06 10:17:25AM				
<input type="checkbox"/> Update Origination	Orig Status	COD Transmit Status:	On Hold 12/04/06 10:17:25AM				
First 1 of 1 Last							
Seq	Trans Nbr	Award Amount	Student Lvl	Enrollment Date	Elig Reason Cd	HS Program Cd	Program CIP Cd
1	1	\$1300.00	1st yr l	08/30/2006	HS Prog	DE0001	

The Orig Status and COD Transmit Status fields must be updated before a rejected record can be processed.

Processing Adjustments

After COD has accepted a grant record, changes in eligibility can occur and must be reported. When a change to the student's award amount occurs, these records are automatically selected and adjusted by the origination process.

If a change to the student's eligibility information, such as ACG eligibility reason code, HS program code, or CIP code, is required, initiate the change manually in the Manage ACG/SMART Grants component. Select the **Update Origination** check box and run the origination process. A new row will be inserted in the origination detail grid, which allows you to change the eligibility criteria of the grant.

When a grant is adjusted, the origination process will use any updated data in the Grant Eligibility Interface page.

Changes in the student's academic level are not allowed after COD has accepted a grant. Cancel the current origination record and re-originate the grant using a different item type.

Once a disbursement has been disbursed to the student, any subsequent change made to the disbursement amount is not reported until the adjusted amount has been run through the disbursement process.

Loading Grant Eligibility Information with an External File

Optionally, you can import your students' grant eligibility information directly to the Grant Eligibility Interface component using an external flat file. Load this information before originating grant recipients to gain any possible benefit.

After you create the external file, use the FA Inbound process to process the file.

```

C:\TEMP\HERASample.txt
ASG HEADER
1234567890101CA000214.09012
FAD0089 01CA0001 1
FAD0103 02AR6001 2
FAD0125 26.04063
FA0337 01CA000212.12542
FA0712 01CA0001 1
FA0600 01CA0001 1
FA0601 01CA0001 1
FA0711 03 1
FA0712 02 0
FA0604 01CA0001 1
FA0704 02 0
FA0333 | 11.04064

```

[External file sample](#)

See Also

See *Customer Connection: Solution ID: 201029605. Title: ACG/SMART interface document* for instructions on how to create the external file and generate the flat file.

Page Used to Load Grant Eligibility Information

Page Name	Object Name	Navigation	Usage
FA Inbound	RUNCTL_FA_INBOUND	Administer Financial Aid, Exchange Financial Aid Data, Process 03, FA EC File Inbound	Run the FA_INBOUND Application Engine process to load an external grant eligibility file.

Loading an External File

Access the FA Inbound run control page.

FA Inbound

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

Run Option: Single File File List

Inbound File:

ISIR TG Number:

FA Inbound run control page

The FA Inbound process recognizes the grant interface file by reading the first row of the file. The process parses each row in the file and loads the information to the PS_SFA_ASG_ORGDFLT table.

Data validation is not performed. If data already exists in the table, the record is updated with the file information.