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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8SP1
Financial Aid
Updates for SA Bundle # 18
Regulatory Release 3 2007-2008

April 2007

ORACLE®

Regulatory Release 3 2007-2008

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Financial Aid Regulatory Release 3 2007-2008: Bundle #18

Note. This document is an update to the *PeopleSoft Enterprise Financial Aid 8 SP1 PeopleBook*. It describes the Product Update ID #656266 that was posted to Customer Connection in April 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with CS Bundle # 18. Specifically, it discusses:

- Pell Schedules for 2007-2008.
- Annual Updates to Pell COD processing.
- COD Reports for ACG and SMART grants.

Pell Schedules for 2007-2008

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

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

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

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

Annual Updates for Pell COD Processing

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

COD Reports for ACG and SMART Grants

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

- Select an ACG/SMART data request.

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

Pages Used to Produce ACG and SMART COD Reports

Page Name	Object Name	Navigation	Usage
ACG/SMART Data Request	SFA_ASG_DATA_REQUEST	Administer Financial Aid, Process ACG/SMART Grants, Use, ACG/SMART Data Request	Select the type of data request that you want to create for submission to COD.
FA EC File Inbound	RUNCTL_FA_INBOUND	Administer Financial Aid, Process ACG/SMART Grants, Process, FA EC File Inbound	Load Federal data files into staging tables
ACG/SMART Data Request Outbound	SFA_RUNCTL_ASG_DR	Administer Financial Aid, Process ACG/SMART Grants, Process, ACG/SMART Data Request	Create and store the report data request information files at the location you specify. These files are then sent to COD.
ACG/SMART Multiple Reporting	SFA_RUNCTL_ASG_MR	Administer Financial Aid, Process ACG/SMART Grants, Process, ACG/SMART Multiple Reporting	Update MRR status of originated grant records from the loaded MRR files from COD.
Origination	SFA_ASG_ORIG	Administer Financial Aid, Process ACG/SMART Grants, Use, Manage ACG/SMART Grants	View updated MRR status information on originated grant records.
ACG/SMART Header, ACG/SMART Data Request, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_DREQ_EC, SFA_ASG_TRAILER_EC	Administer Financial Aid, Process ACG/SMART Grants, Inquire, ACG/SMART Data Request	View data request file information for ACG and SMART grants.
ACG/SMART Header, ACG/SMART Multiple Report, ACG/SMART Institution Info, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_MRR_EC, SFA_ASG_MRR_EC_INS, SFA_ASG_TRAILER_EC	Administer Financial Aid, Process ACG/SMART Grants, Inquire, ACG/SMART Multiple Reporting	View loaded MRR file data.

Page Name	Object Name	Navigation	Usage
ACG/SMART Header, ACG/SMART Reconciliation, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_REC_EC SFA_ASG_TRAILER_EC	Administer Financial Aid, Process ACG/SMART Grants, Inquire, ACG/SMART Reconciliation	View loaded reconciliation file data.
ACG/SMART Header, ACG/SMART ESOA Summary, ACG/SMART ESOA Detail, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_SAR_EC, SFA_ASG_SARD_EC SFA_ASG_TRAILER_EC	Administer Financial Aid, Process ACG/SMART Grants, Inquire, ACG/SMART Statement of Account	View loaded Statement of Account file data.
ACG/SMART Header, ACG/SMART Originations, ACG/SMART Disbursements, ACG/SMART Summary, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_YTDORG_EC SFA_ASG_YTDDSB_EC SFA_ASG_YTDSUM_EC SFA_ASG_TRAILER_EC	Administer Financial Aid, Process ACG/SMART Grants, Inquire, ACG/SMART Year To Date	View loaded Year To Date file data.
YTD Origination All Recipients	SFA_ASG_871_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART YTD Origination	Generate a list of students who are in an origination year-to-date file sent by COD.
YTD Origination Errors	SFA_ASG_872_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART YTD Orig Errors	Review conflicting information from COD and your application tables.
YTD Disb All Recipients	SFA_ASG_873_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART YTD Disbursement	Generate a list of students who have been disbursed as of the year to date.
YTD Disbursement Errors	SFA_ASG_874_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART YTD Disb Errors	Review conflicting information from COD and your application tables.
ACG/SMART MRR Batch Report	SFA_ASG_875_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART MRR by Batch	Review and monitor POP (potential overaward payment) and Blocked Institution situation by specific batches.

Page Name	Object Name	Navigation	Usage
ACG/SMART MRR by Status Code	SFA_ASG_875B_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART MRR by Status Code	Review and monitor POP and Blocked Institution situation by specific Status codes. Use after the MRR inbound file is imported and the ACG/SMART Multiple Reporting process has been run.
ACG/SMART MRR Report	SFA_ASG_875A_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART MRR Report	Review and monitor POP and Blocked Institution situation. Use after the MRR inbound file is imported and the ACG/SMART Multiple Reporting process has been run.
ACG/SMART ESOA	SFA_ASG_870_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART ESOA	Review and monitor ACG and SMART grant fund allocations.
ACG/SMART Reconciliation Report	SFA_ASG_923_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART Reconciliation Report	Review records reconciled with COD.
ACG/SMART Origination Status	SFA_ASG_876_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART Origination Status	<p>Review and monitor students in selected Origination Status and COD Transmit Status values.</p> <p>Origination Status values include <i>Accepted, Corrected, Originated, Rejected, Transmitted, Change to Origination, and Cancelled.</i></p> <p>COD Transmit Status values include <i>Cancel, On Hold, Ready, Review, and Transmitted.</i></p>

Understanding ACG/SMART Data Requests

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

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

Selecting an ACG/SMART Data Request

Access the ACG/SMART Data Request.

ACG/SMART Data Request

Reset

Academic Institution: PSUNV PeopleSoft University

Reporting School Code: 001315 UNIVERSITY OF CALIFORNIA (UCLA)

Aid Year: 2007

Attended Pell ID: 001315 UNIVERSITY OF CALIFORNIA (UCLA)

ACG/SMART Data Request Type		View 1		First	1-9 of 9	Last
Seq: 2	Request Type:	ACG Multiple Reporting	YTD Request ID	+	-	
	Multiple Report Request Code 1:	Disbursed Records	Institution			
	Multiple Report Request Code 2:	Selected Institution	Student			
Seq: 3	Request Type:	ACG Multiple Reporting	YTD Request ID	+	-	
	Multiple Report Request Code 1:	Originated Records	Institution			
	Multiple Report Request Code 2:	Selected Students	Student			

ACG/SMART Data Request

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

Request Type

Select the type of information report. Values are:

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

ACG Reconciliation Request: Select to receive reconciliation information.

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

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

SMART Multiple Reporting: See ACG Multiple Reporting.

SMART Reconciliation Request: See ACG Reconciliation Request.

SMART Statement of Accounts: See ACG Statement of Accounts.

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

Multiple Report Request Code 1

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

Multiple Report Request Code 2

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

YTD Request ID

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

Institution

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

Student

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

Generating ACG or SMART Data Request Files

Access the ACG/SMART Data Request Outbound page.

ACG/SMART Data Request Outbound

Run Control ID: PS

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

Run

Selection Criteria		First	1 of 1	Last
*Academic Institution:	<input type="text" value="PSUNV"/>	PeopleSoft University		
*Aid Year:	<input type="text" value="2007"/>	2006-2007		
*Reporting School Code:	<input type="text" value="001315"/>			
*File Type:	<input type="text" value="SMART Data Request"/>			
*File Path and Name:	<input type="text" value="\\ENC-DEVSHARE01\TESTDATA\"/>			

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

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

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

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

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

Processing Multiple Reporting Records

Access the ACG/SMART Multiple Reporting page.

ACG/SMART Multiple Reporting

Run Control ID: ASG_ORIG

[Report Manager](#)

[Process Monitor](#)

Run

Report Request Parameters

ACG/SMultiple Reporting Record

ACG/SMART Multiple Reporting page

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

ACG/SMART Multiple Reporting Record

Select this option to process ACG and SMART MRR files.

Viewing Updated Origination Records

Access the Origination page.

Origination **Disbursement**

Test1_Student

Aid Year: 2007 Financial Aid Year 2006-2007

Item Type: 900000000400 Federal ACG Grant

EmplID: FAASG001

Institution: PSUNV

Career: UGRD

Award ID: 758910001A07001315001

Grant Type: ACG

Update Origination [Orig Status](#)

Reporting School Code: 001315

Origination Status: Originated 04/03/07 12:45:58PM

COD Transmit Status: Ready 04/03/07 12:45:58PM

MRR Status: Con Enrl 04/03/2007 12:46:36PM

First ◀ 1 of 1 ▶ Last

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

Origination page

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

MRR Status

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

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

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

None: No MRR information found.

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