

ORACLE®

PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8SP1
Financial Aid
Updates for CS Bundle # 19
Regulatory Release 4 2007-2008

June 2007

ORACLE®

Regulatory Release 4 2007-2008

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Regulatory Release 4 2007-2008

Note. This document is an update to the *PeopleSoft Financial Aid 8 SP1 PeopleBook*. It describes the Product Update ID #656271 that was posted to Customer Connection in June 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 # 19. Specifically, it discusses:

- Updates to Fiscal Operations Report and Application to Participate (FISAP).
- Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (SMART) awards for 2007-2008.

Updates to Fiscal Operations Report and Application to Participate (FISAP)

FISAP has been updated to accommodate 2006-2007 reporting and the 2008-2009 application. The FISAP report now includes the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent (SMART) Grant.

This section includes updates to:

- Understanding the FISAP Report
- Students Selected for the Report
- Assessments and Expenditures
- Producing the FISAP Report

Understanding the FISAP Report

FISAP report information is updated to include ACG and SMART such that Part II, Section E, Assessment and Expenditures includes:

- Total Federal Pell Expenditures.
- Total Academic Competitiveness Grant (ACG).
- Total National SMART Grant.
- Total Expended for State Grants and Scholarships Made to Undergraduates.

Students Selected for the Report

Students selected for the report include students who have awards with financial aid item types of FSEOG, Federal Perkins Loan, Federal Work-Study, Federal Pell Grant, ACG Grant or National SMART Grant at the time of disbursement. This means that even if the institution changes the award's financial aid item type after disbursing the award, the FISAP report still counts the student and the award amount in the correct category.

Assessments and Expenditures

Part II, Section E of the FISAP report lists total expenditures in dollar amounts.

The report gathers award disbursement information based on financial aid item type setup to calculate the total (A) Pell, (B) ACG and (C) SMART grant expenditures for the aid year. Financial aid item type setup is defined as having a Source of *Federal* and a Federal ID of *Pell*, *ACG*, or *SMART* on the Financial Aid Item Type 1 page. These totals include all students who received a Pell, ACG and/or SMART 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 as having a Source of *State* and a Federal ID 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.

Producing the FISAP Report

Note. Before using this new FISAP run control component to produce the report in the new aid year and format, be sure to update your security profiles for correct viewing and use.

The page and navigation path have been updated.

Page Used to Produce the FISAP Report

Page Name	Object Name	Navigation	Usage
Report on Eligible Aid Applicants for Award Year 2006-2007	SFA_RUNCTL_FISAP09	Administer Financial Aid, Package and Disburse Aid, Report, FISAP Report 09	Generate the FISAP report.

Generating the FISAP Report

Access the Report on Eligible Aid Applicants for Award Year 2006-2007 page.

Report on Eligible Aid Applicants for Award Year 2006 - 2007

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

Institution: ▼

Aid Year: ▼

Overrides

SSA Citizenship Override DHS/INS Match Override

[Report on Eligible Aid Applicants for Award Year 2006-2007 page](#)

Overview of ACG and SMART Grant Functionality

The Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (SMART) awards for the 2007-2008 year affect several setup steps and processes. Some functionality is new and other Financial Aid features have been changed to include ACG/SMART grants. COD reporting for ACG/SMART was presented with Regulatory Release 3, but is presented again to show the changes in context.

ACG/SMART functionality is now available for all phases: Financial Aid Term, Eligibility, Packaging, Disbursement, and COD Reporting:

- Financial Aid Term
 - Changes to Financial Aid Term processing for ACG/SMART
- Eligibility
 - Set up eligibility requirements for ACG and SMART grants
 - Determining eligibility for ACG and SMART grants
 - Writing equations for ACG/SMART eligibility
- Packaging
 - Changes to NSLDS Aggregates for ACG/SMART
 - Changes to Packaging for ACG/SMART
- Disbursement
 - Changes to Financial Aid disbursement processing for ACG and SMART grants
- COD Reporting
 - Reporting ACG and SMART grants to COD
 - Creating ACG and SMART COD Reports

See Also

Oracle's PeopleSoft 8.0 Financial Aid Updates for CS Bundle #18, Regulatory Release 3 2007-2008, "COD Reports for ACG and SMART Grants".

Changes to Financial Aid Term Processing for ACG/SMART

The Financial Aid Term process has been modified to calculate and store the student's HERA academic level.

This section provides an overview and discusses how to:

- Access the HERA Academic Level page.
- Review HERA academic levels.

Understanding HERA Academic Level Calculations

The new HERA academic level will be used to support the processing of ACG and SMART grants beginning with the 2007-2008 award year. FA Term will calculate the new HERA level by calculating the total number of units completed by the student and then determining the level based on new level load rules. A new setup page is provided to indicate the level load rules to use for the calculation.

The total number of credits that are used in the calculations depends on their occurrence within the term. The following table indicates how the number of credits is determined.

HERA Level	Projected Term	Enrolled, Term not started	Enrolled, Term in progress	Term Completed
Beginning of Term	All completed units not counting the current term PLUS Transfer, Test credit, and other units, less adjustments. Excess FA Units assigned to remedial type courses are not included.	Same	Same	Same
End of Term	Same units calculated for Beginning of Term PLUS Projected units for the current term	Same units calculated for Beginning of Term PLUS Enrolled units for the current term	Same units calculated for Beginning of Term PLUS Anticipated, in progress, completed units	Same units calculated for Beginning of Term PLUS Completed units for the current term

Note. The weeks-of-enrollment component of the HERA academic level progression is currently not considered.

Pages Used to Calculate and Store HERA Academic Levels

Page Name	Object Name	Navigation	Usage
Acad Level (academic level)	STDNT_FA_ACAD_LVL	<ul style="list-style-type: none"> Administer Financial Aid, Apply for Financial Aid, Use, Financial Aid Term, Acad Level Administer Financial Aid, Canadian Need Analysis, Use, Financial Aid Term, Acad Level Administer Financial Aid, Manage Need Analysis, Use, Financial Aid Term, Acad Level Administer Financial Aid, Package and Disburse Aid, Use, Financial Aid Term, Acad Level Administer Financial Aid, Process Loans, Use, Financial Aid Term, Acad Level Administer Financial Aid, Process Pell Payment, Use, Financial Aid Term, Acad Level 	Provides access to the HERA Academic Level page using a new hyperlink.
HERA Academic Level	STDNT_FA_ASGAL_SEC	Click on the View HERA Academic Level link on the Acad Level page.	Displays the HERA academic levels calculated by FA Term.

Accessing the HERA Academic Level Page

Access the Acad Level page.

[Acad Level \(academic level\) page](#)

A new link has been added to this page. Click the View HERA Academic Level link to access the HERA Academic Level page. This link will only appear if the HERA academic level setup has been provided for the institution.

Reviewing HERA Academic Levels

Access the HERA Academic Level page.

[HERA Academic Level page](#)

Beginning of Term (academic level)	The HERA academic level of the student at the beginning of the current term. Valid values are the undergraduate NSLDS loan year values.
End of Term (academic level)	The HERA academic level of the student at the end of the current term. Valid values are the undergraduate NSLDS loan year values. The End of Term value is used to identify when the student is projected to advance to a new level at the end of the term.

<p>Calculated Values/Override</p>	<p>Select the Override check box if you plan to change the HERA level value. The calculated values will always display what FA Term has calculated as the student's HERA level. The override check boxes are automatically selected if the current level does not match the calculated value.</p>
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Setting Up Eligibility Requirements for ACG and SMART Grants

This section discusses how to:

- Select ACG and SMART processing options.
- Set up Financial Aid equation groups.
- Select ACG/SMART reporting options.
- Set up CIP codes for SMART.
- Set up ACG state program codes.
- Set up COD edit codes.
- Set up HERA academic level rules.
- Create academic level rules to calculate the HERA level.

Pages Used to Set Up ACG and SMART Grant Processing

Page Name	Object Name	Navigation	Usage
ACG/SMART Processing Options	SFA_ASG_PARMS	Administer Financial Aid, Process ACG/SMART Grants, Setup, ACG/SMART Processing Options	Set up the evaluation and awarding options for ACG and SMART grants.
ACG/SMART Reporting Options	SFA_ASG_SETUP	Administer Financial Aid, Process ACG/SMART Grants, Setup, ACG/SMART Reporting Options	Set up grant origination 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, ACG State Program Codes	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.

Equation Group Setup	SFA_EQ_GROUP_SETUP	Administer Financial Aid, Process ACG/SMART Grants, Setup, Equation Group Setup	Create and maintain equation groups to be used by Financial Aid processes.
HERA Academic Level Setup	SFA_ASG_AL_TBL	Design Student Administration, Design Financial Aid 1, Setup F-K, HERA Academic Level Setup	Maintain the HERA academic level calculation settings for undergraduate students.
Academic Level Table	ACAD_LEVEL_TBL	Design Student Administration, Define Student Administration, Setup, Level/Load Rules Table	Define several student level calculations such as Academic Level, NSLDS Loan Year, and Direct Lending Year.

Selecting ACG and SMART Processing Options

Access the ACG/SMART Processing Options page.

ACG/SMART Processing Options

Institution: PSUNV PeopleSoft University

Aid Year: 2008

***Grant Participant:** ▼

***Awarding Option:** ▼

Academic Level Equation 🔍

Option:

CIP Code Equation: FAASCIPFATRM

CIP Code Source: Academic Program

[ACG/SMART Processing Options page](#)

Grant Participant

Select the grant programs for which the grant evaluation process should process students who have the qualifying HERA academic level.

ACG and SMART. Select and evaluate students for both ACG and SMART grants.

ACG Only. Select and evaluate students for ACG grants.

Smart Only. Select and evaluate students for SMART grants.

Awarding Option

Select the minimum grant eligibility status required to award the ACG/SMART grant during the Packaging process:

Eligible. Only award if the eligibility status is at this level.

Eligible, pending. In addition to the eligibility status of Eligible, also award if the status is *Eligible, pending*.

Academic Level Equation Option

Optional. If left blank, the grant processes assign the HERA level calculated in the student's FA Term record. Select a custom equation that will calculate the student's HERA academic level and assign the value in the student's grant eligibility record.

CIP Code Source
(classification of instructional program code source)

Required for SMART participants. Select from *Academic Plan, Academic Program, and Academic Subplan*.

CIP Code Equation

Required for SMART participants. Select the equation that will derive the student's CIP code. The delivered equation *FAASSCIPFATM* is the default equation for most schools. It uses the CIP Code source and the student's academic program, plan, and sub-plan information stored in FA Term to determine the CIP code. It does not verify that the CIP code is SMART eligible. Schools can also create a custom equation to determine the CIP code.

Setting Up Financial Aid Equation Groups

Access the Equation Group Setup page.

Equation Group Setup

Institution: PSUNV PeopleSoft University

Equation Group: AMLACG2TESTGROUP

***Group Type:** ▼

Description:

		First ◀	1-3 of 3	▶ Last
	*Equation Name	Description	Equation Sequence	
1	FAASDACGSGR <input type="text"/>	Check Stdnt Groups if Eligible	1	+ -
2	FAASDAPTEST <input type="text"/>	ACG AP External Test Score	2	+ -
3	FAASDCITIZEN <input type="text"/>	ACG/SMART Citizenship		+ -

[Equation Group Setup page](#)

Use the Equation Group Setup page to assign the equations to be used to evaluate a student's grant eligibility. Do not create equation groups until you have determined how and when to incorporate the use of equations in your business processes.

You can create multiple equation groups based on your grant evaluation business process. Equation groups primarily determine if students are eligible to receive ACG or SMART grants, but can also be designed to verify that students continue to maintain their eligibility.

Equation Group

Select your name for the equation group. If in Add mode, enter the name in free-form text.

Group Type	<p>Required. Select the specific grant that the equation group will be used to evaluate.</p> <p><i>ACG 1.</i> ACG evaluation for students with HERA level 0 or 1.</p> <p><i>ACG 2.</i> ACG evaluation for students with HERA level 2.</p> <p><i>SMART 1.</i> SMART evaluation for students with HERA level 3.</p> <p><i>SMART 2.</i> SMART evaluation for students with HERA level 4.</p>
Description	<p>Displays the user-defined description of the equation group.</p>
Equation Name	<p>Select the equation to be added to the group. Use the delivered equations, or those designed by your institution. The available equations that can be selected are filtered. Only equations with names beginning with FAAS can be selected.</p>
Equation Sequence	<p>Assign a sequence number to determine the order of execution of each equation in a group. This is important if you require a value determined by an earlier equation to be used by a later equation in the group. If left blank, the grant process will assume the equation sequence is zero.</p>

For more information on equations and equation groups, see Writing Equations for ACG/SMART Eligibility on page 333.

Selecting ACG/SMART Reporting Options

Access the ACG/SMART Reporting Options page.

ACG/SMART Reporting Options

Institution: PSUNV PeopleSoft University

Aid Year: 2008

Setup Options View All First ◀ 1 of 1 ▶ Last

*Reporting School Code: PeopleSoft University

Disbursement Offset: Originate Offered Awards

Disb Prior to Transmitting

[ACG/SMART Reporting Options page](#)

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.

Setting Up CIP Codes for SMART

Access the Eligible CIP Codes for SMART page.

Eligible CIP Codes for SMART

Aid Year: 2008 Federal Aid Year 2007 - 2008

		First	1-301 of 301	Last
*Code	Description	Status		
01.0901	Animal Sciences, General	Active	+	-
01.0902	Agricultural Animal Breeding	Active	+	-
01.0903	Animal Health	Active	+	-
01.0904	Animal Nutrition	Active	+	-
01.0905	Dairy Science	Active	+	-
01.0906	Livestock Management	Active	+	-
01.0907	Poultry Science	Active	+	-
01.0999	Animal Sciences, Other	Active	+	-
01.1101	Plant Sciences, General	Active	+	-
01.1102	Agronomy and Crop Science	Active	+	-
01.1103	Horticultural Science	Active	+	-
01.1104	Agricultural and Horticultural Plant Breeding	Active	+	-
01.1105	Plant Protection and Integrated Pest Management	Active	+	-
01.1106	Range Science and Management	Active	+	-
01.1199	Plant Sciences, Other	Active	+	-
01.1201	Soil Science and Agronomy, General	Active	+	-
01.1202	Soil Chemistry and Physics	Active	+	-

[Eligible CIP Codes for SMART page](#)

The page displays all SMART grant eligible Classification of Instructional Program (CIP) codes. The codes are set up by aid year and are populated for 2007 and 2008.

Code The Classification of Instructional Program (CIP) code.

Description Program description of the CIP code.

Status Indicates whether the CIP code is eligible to make new awards for the aid year.
Active. Indicates that the program is eligible for a first time SMART recipient for the aid year.
Inactive. Indicates that the program is not eligible for first time awards for the aid year, but may be used to award a renewal SMART grant for eligible students who were awarded in a previous aid year.

Setting Up ACG State Program Codes

Access the ACG State Program Codes page.

ACG State Program Codes

Aid Year: 2008 Federal Aid Year 2007 - 2008

First ◀ 1-99 of 99 ▶ 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	+	-

[ACG State Program Codes page](#)

The page displays all ACG grant eligible state high school program codes. The codes are set up by aid year and are populated for 2007 and 2008.

Setting Up COD Edit Codes

Access the COD Edit Codes page.

COD Edit Codes

Aid Year: 2008 Federal Aid Year 2007 - 2008

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	Schools cannot submit legacy records for this program and award year	+	-
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	+	-
017	PLUS Endorser and Student Cannot be the Same Person.	+	-
020	First Name and Last Name blank	+	-
021	Address is incomplete	+	-

[COD Edit Codes page](#)

The page displays all COD edit messages for 2007. These codes and descriptions are displayed in the ACG/SMART origination pages.

Setting Up HERA Academic Level Rules

Access the HERA Academic Level Rule Set Up page.

HERA Academic Level Rule Set Up

Academic Institution: PSUNV PeopleSoft University

First ◀ 1-3 of 3 ▶ Last

Career	Program	Plan	*Academic Level Rule		
1		CHEM-B 🔍	HE01 🔍	+	-
2	FAU 🔍		HE02 🔍	+	-
3	UGRD 🔍		HE01 🔍	+	-

[HERA Academic Level Rule Set Up page](#)

The Financial Aid Term process calculates HERA academic student level values to be used to evaluate, award, and disburse ACG and SMART grants.

Use this page to assign HERA level-specific academic level load rules for calculating the student's levels and to set the default level load rule for your undergraduate academic careers. For academic programs or academic plans that require a separate academic level rule, define those programs and plans.

Career	Define each undergraduate academic career that could qualify for ACG or SMART grants.
Program	Enter only those academic programs that require a different academic level rule to calculate their HERA academic level different from the rule defined for the student's academic career.
Plan	Enter only those academic plans that require a different academic level rule to calculate their HERA academic level different from the rule defined for the student's academic career or academic program.
Academic Level Rule	<p>The academic level load rule will be used to calculate the student's HERA student level progression.</p> <p>The academic level rules are created in the Level/Load Rules Table page.</p>

Creating Academic Level Rules to Calculate the HERA Level

Use the Level/Load Rules Table component to define several student level calculations such as Academic Level, NSLDS Loan Year, and Direct Lending Year. For HERA level calculation, the FA term process will use the NSLDS Loan Year settings to determine the student level to assign. This is because the NSLDS loan year values match the student level values that are reported to COD.

Access the Academic Level Table page.

Level/Load Rules Table Academic Level Table Academic Load Table Statistics Period Load

SetID: PSUNV
Academic Level Rule: HE01 HERA 24

View All First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

First 1-8 of 6 Last

Cum Units/Terms	*Academic Level	*NSLDS Loan Year	*Direct Lending Year
0.000	Not Set	1st Yr Nvr	Grd/Prf 1 + -
1.000	Not Set	1st Yr Prv	Grd/Prf 1 + -
24.000	Not Set	2nd Year	Grd/Prf 1 + -
48.000	Not Set	3rd Year	Grd/Prf 1 + -
72.000	Not Set	4th Year	Grd/Prf 1 + -
100.000	Not Set	5th Year+	Grd/Prf 1 + -

Academic Level Table page with example.

In the example, the Cum Units/Terms column and the NSLDS Loan Year define how the student’s HERA level should be calculated, as shown in the following table.

If the student’s cumulative completed units is:	Then this HERA level is assigned:
0 to 23	1 st year, previously attended
24 to 47	2nd year
48 to 71	3 rd Year
72 to 99	4 th Year
More than 99	5 th Year

Note that the Academic Level and Direct Lending Year columns are ignored by the HERA level calculation.

If your school participates in the SMART grant program, define your grade level progressions from 1st year thru 5th year.

See Also

For more information on how to access and create Level Load Rules, see *PeopleSoft 8 SP1 Student Records PeopleBook*, “Preparing for the Course Catalog and Schedule of Classes,” Defining Academic Level and Load Rules.

For more information on the Financial Aid Term changes, see Changes to Financial Aid Term Processing for ACG/SMART on page 3.

Determining Eligibility for ACG and SMART Grants

The grant evaluation process identifies potential grant candidates based on their current ISIR information. These records are then evaluated using equations to determine if the student meets the eligibility criteria for a grant. Some evaluated records will require manual review before final eligibility can be determined.

Because eligibility can change during the aid year, schools must establish a student's eligibility for each enrolled term. Schools could also reassess a student's eligibility any time during the term to make changes to the student's awards before disbursement processing.

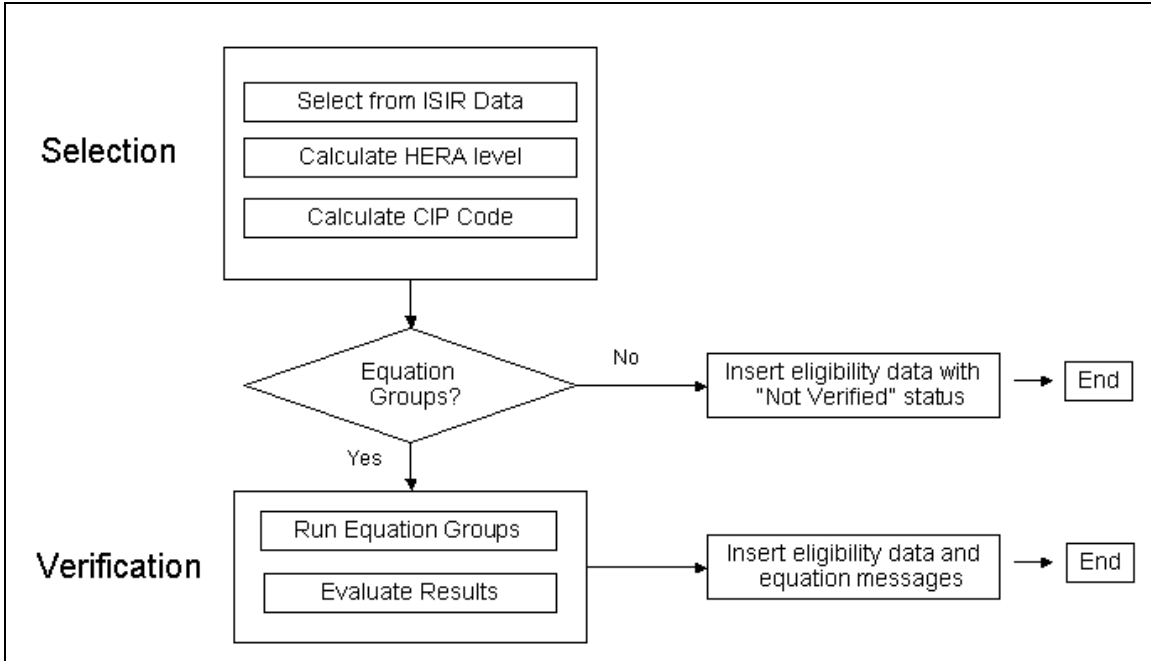
Schools are not required to use the grant evaluation process. Alternate methods for determining eligibility for ACG and SMART are also discussed in this section.

This section provides an overview and discusses how to:

- Run the grant eligibility evaluation process.
- Review and update eligibility information.
- Select and review CIP codes.
- Reprocess ineligible records.
- Reprocess eligible records.
- Implement ACG/SMART processing.
- Load grant eligibility information from an external file.

Understanding the Grant Eligibility Review Process

FAPASEQN is the main process used by the grant module. The process has two events, the selection of potential grant candidates and the verification of eligibility for each candidate.



FAPASEQN Process

This overview discusses how to:

- Select grant candidates.
- Verify grant candidates.
- Re-run the grant eligibility review for previously selected students.

Selecting Grant Candidates

The process identifies potential candidates for ACG and SMART grants based on the student's current ISIR data and these requirements:

- The student must be reported as Pell eligible (Pell Grant Eligibility Flag = Y)
- The student must be a US citizen. (Social Security Administration Citizenship Flag field is blank: Domestic born US Citizen or A: US Citizen, or student self reported as a US Citizen.

The student's HERA academic level is used to determine the grant type for which the student might be eligible. The HERA academic level is determined in one of these ways:

- Use the beginning of term HERA level calculated by the FA Term process. This is the default.
- Create an equation to calculate the HERA level.

For SMART grant program participants, selected records with a HERA level of 3 and 4 are evaluated for a Classification of Instructional Program (CIP) code. Depending on the school's setup, their student's academic program of study is defined at the academic program, academic plan, or academic sub plan levels and the assigned CIP code is determined.

Verifying Grant Candidates

Define your equation groups based on the type of grant for which the student is being considered and their HERA level. A check is performed to determine if an equation group has been assigned to the student:

- If no equation group has been assigned, the student's grant eligibility information record is created with the information collected up to this point. An eligibility status of *Not Verified* is assigned, since the equation group evaluation has not occurred.
- If an equation group has been assigned, the equations are run to evaluate the students. The eligibility status resulting from the equation can be: *Eligible*; *Eligible, pending review*; *Ineligible*; or *Ineligible, pending review*. The student's grant eligibility information record is created with the information collected up to this point, including the results of each equation.

You can review the resulting information in the ACG/SMART Grant Eligibility component.

Re-running the Grant Eligibility Review for Previously Selected Students

If a student has been reviewed and information exists in the grant eligibility tables, the process will continue to evaluate the student until a final eligibility status (*Eligible*, *Ineligible*, *Cancelled*) has been made for the selected grant type and term. The following updates occur at each evaluation:

Recalculation of the HERA academic level

The student's HERA academic level must be reviewed for changes each time a student is evaluated to determine which equation group is to be used to determine the student's eligibility:

- If the level changes to a value that is invalid for the existing grant type, the student is made ineligible for that grant type. For example, if a student was initially identified as an ACG 2 candidate, but subsequently is found to be a level 3, the student is made ineligible for the ACG award. In this case, a new eligibility record for SMART is then created for the student.
- If the HERA level override check box is selected, the process will not recalculate the student's level.

Update of the CIP code

Like the HERA level, the student's CIP code will also be evaluated if a final eligibility status has not yet been determined. If the CIP code has changed, the student's eligibility records will be updated to reflect the change.

If the CIP override check box has been set, the process will use the existing CIP code.

Update of the Student's grant eligibility records

After these checks are performed, the process continues, as it would for newly selected grant candidates. The process checks for equation groups to verify eligibility and updates the grant eligibility records.

Eligibility information already exists for the student:

- If the process is running with equations, it always adds a new row if the current status for the record is *Not Verified*, because the status changes from *Not Verified* to something else. If the status and data remain the same, a new row is not added, but the Equation Engine reasons are refreshed, deleting old messages and inserting new messages.

- If the current eligibility status is another value, or if data changes occur, a new eligibility row is inserted so that the changes can be documented.

Pages Used to Determine Eligibility for ACG and SMART Grants

Page Name	Object Name	Navigation	Usage
Evaluate ACG/SMART Eligibility	SFA_RUN_ASG_SEL	Administer Financial Aid, Process ACG/SMART Grants, Process, Evaluate ACG/SMART Eligibility	Run the Grant selection and evaluation process.
ACG/SMART Grant Eligibility	SFA_ASG_ELIG	Administer Financial Aid, Process ACG/SMART Grants, Use, ACG/SMART Grant Eligibility, ACG/SMART Grant Eligibility	Review and update student grant eligibility records.
ACG/SMART Grant Comments	SFA_ASG_ELIGCMNT	Administer Financial Aid, Process ACG/SMART Grants, Use, ACG/SMART Grant Eligibility, ACG/SMART Grant Comments	Add free-form comments to the student's grant eligibility record.
Select CIP Code	SFA_ASG_CIPSEL_SEC	Click the Select CIP Code link on the ACG/SMART Grant Eligibility page.	Look up or select the CIP code for a program, plan, or sub-plan.
FA Inbound	RUNCTL_FA_INBOUND	Administer Financial Aid, Exchange Financial Aid Data, Process, FA EC File Inbound	Process the external file used to input students' grant eligibility information.

Running the Grant Eligibility Evaluation Process

Access the Evaluate ACG/SMART Eligibility page.

Evaluate ACG/SMART Eligibility

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

Selection Criteria First 1 of 1 Last

*Institution: PSUNV *Aid Year: 2008 *Term: 0600 Include Ineligible Records + -
 Reprocess Eligible Records

View All		First	1-2 of 2	Last
*Award Type	*Equation Group			
1 ACG 2	AMLACG2TESTGROUP	<input type="text"/>	+ -	
2 SMART 1	AMLSMART1TESTGROUP	<input type="text"/>	+ -	

Evaluate ACG/SMART Eligibility page

- Institution** Required. The academic institution that the process will select.
- Aid Year** Required. The aid year to process.
- Term** Required. The term that will be evaluated for grant eligibility.
- Include Ineligible Records** Option to select and reprocess records with an eligibility status of Ineligible. This occurs in addition to selecting new records and the reprocessing of existing records without a final eligibility determination.
This cannot be run with the Reprocess Eligible Records option.
- Reprocess Eligible Records** Option to select and reprocess only records with an eligibility status of *Eligible*. No other records are processed. Use this option to perform census-type re-evaluations of eligible students.
This cannot be run with the Include Ineligible Records option.
- Award Type** Select an award type value that corresponds to a specific grant type and HERA level you use:
ACG 1. First year ACG (HERA levels 0 and 1)
ACG 2. Second year ACG (HERA level 2)
SMART 1. First year SMART (HERA level 3)
SMART 2. Second year SMART (HERA level 4)
- Equation Group** Optional. For each Award Type, select the equation group that will perform the eligibility evaluation. Equation groups are not required to run the process.

How Eligibility is Determined

The grant eligibility status is determined by the results of the equations executed within the equation groups. Equations used to evaluate eligibility can set a result value of:

- PASSED. The conditions the equation tested were met
- FAILED. The conditions the equation tested were not met
- UNDETERMINED. There was not enough information necessary to make a PASSED or FAILED determination.

The process evaluates the results of the equations run against each student and:

- If all equations return a result of PASSED, the student's grant eligibility status will be *Eligible*.
- If one or more equations return a result of FAILED, the student's eligibility status will be *Ineligible*.
- If one or more equations return a result of UNDETERMINED, and all other equations returned a result of PASSED, the student status will be *Eligible Pending Review*.

Review Flag

The review flag is a setting that forces any grant record to be reviewed manually; the grant process will not assign a final eligibility status. When an equation sets the review flag, the student's eligibility status is set to either *Eligible, pending review* or *Ineligible, pending review*.

If equation groups are not assigned for an award type when the grant process is run, the eligibility status will not change since these students are not being evaluated. However, if a student's HERA level has been updated so that they are no longer eligible for the grant type on the eligibility record (for example, the student goes from level 2 to level 3), the record will automatically be made ineligible.

For detailed examples of how the eligibility status is determined, see Writing Equations for ACG/SMART Eligibility on page 333.

Processing by Term

Because grant eligibility must be evaluated each term, schools should begin their processing cycle by selecting records for the first term in their aid year. Once eligibility has been established for the term, students can be awarded.

The Packaging process can project a student's grant eligibility beyond the current term as long as the student's HERA level does not change from the first term awarded in subsequent terms. Grants can also be originated and transmitted to COD at this point. For more information, see "Understanding Packaging Rules – Projected Awards" section.

Therefore, schools generally should not reprocess their eligible students for later terms until after the first term has already started, or until a final eligibility status can be calculated for the term.

Reviewing and Updating Eligibility Information

After the grant evaluation process is run, the processed records can be viewed in the ACG/SMART Grant Eligibility pages. Here, you can review the student's status and complete the evaluation of the student's eligibility. You can also enter students manually into the page so that the evaluation process can process the student's eligibility, or the staff can complete the review manually.

Note. As of the 2007-2008 aid year, all students who are eligible to receive ACG or SMART grants must have eligibility information to award and disburse grant funds to the student, as well as originate and report the student's eligibility information to COD.

Access the ACG/SMART Grant Eligibility page.

ACG/SMART Grant Eligibility | ACG/SMART Grant Comments

Test2, Student ID: FAASG002
 Institution: PSUNV Grant Type: Academic Competitiveness
 Aid Year: 2008 Term: 2008 Spring

View All First 1 of 3 Last

Ovrd *Eligibility Status: Eligible Status Date: 06/11/07 12:20:25PM
 HERA Student Level: 2nd Year Seq Nbr: 3
 Eligibility Reason: AP/IB Source: User Disbursement Protection
 High School Program: CIP Code: Other Information
 GPA: [Financial Aid Status](#) [External Education](#) [Student Program](#)
[Term History](#) [NSLDS Inquiry](#) [Award Summary](#)
[FA Term](#)

Messages		Details
DateTime	Message Text	
1 06/07/2007 3:44:34PM	PASSED: US Citizenship has been confirmed	
2 06/07/2007 3:44:34PM	UNDETERMINED: No data found in Student Groups to make ACG eligibility determination.	

ACG/SMART Grant Eligibility page

Eligibility Status

The student's current grant eligibility status for the term.

Eligible, pending review. The student appears to be eligible for the grant, but a manual review is required for a final decision.

Eligible. The student is eligible for the grant.

Ineligible, pending review – The student appears to be ineligible for the grant, but a manual review is required for a final decision.

Ineligible. The student is not eligible for the grant.

Not Verified. The student has been entered as a potential grant candidate. Evaluation has not yet been performed. This setting is assigned if the grant evaluation process is run without equation groups assigned.

Cancelled. The student should not have been considered a grant candidate. The record will no longer be selected for review for the same grant and term. This setting is entered manually.

HERA Student Level

The student's HERA academic level:

- 1st yr NA
- 1st year
- 2nd year
- 3rd year
- 4th year

Note. 5th year, Grad/Professional – 1st year, and Grad/Professional – continuing are also available values. They are invalid for ACG/SMART reporting, but are used to document a student's ineligibility.

Ovrd (Override HERA Student Level)

Select to prevent the grant selection process from recalculating the student's current HERA level.

Note that this does not prevent an equation defined in an equation group from changing the value unless specifically coded to note the override condition.

Eligibility Reason

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

HS Prog: 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 that satisfies the ACG curriculum requirements.

High School Program

Required when the (ACG) Eligibility Reason is *HS Prog*. The eligible program code.

CIP Code

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

Ovrd (Override CIP Code)

Select to prevent the grant selection process from recalculating the student's current CIP code.

Note that this does not prevent an equation defined in an equation group from changing the value unless specifically coded to note the override condition.

GPA

Enter the student's GPA for the grant record. This value is not set by any delivered processes, but can be set by using equations.

Ovrd (Override GPA)

Currently not used by any delivered process. Equations created to populate the GPA field should be designed to note if the override has been set.

Disbursement Protection

Indicates to the packaging module whether previously disbursed grant funds should be reversed for a student who becomes ineligible for the grant for the term. By default, this feature is activated so that previously disbursed funds are not reversed.

Status Date

The date and time the current Eligibility Status was set.

Sequence Number

Sequential counter of the existing eligibility rows.

Source

Indicates who inserted the last record on the page, *System* or *User*. If System, all fields are display only.

Select CIP Code

Click this link to access the Select CIP Code page.

Access the Detail tab on the ACG/SMART Grant Eligibility page.

Messages		Details	
Equation Name	Message Set Number	Message Number	
1 FAASCITIZEN	14426	5010	
2 FAASACGSTRP	14426	5192	

[Detail tab on the ACG/SMART Grant Eligibility page](#)

The Detail tab shows the equation name as well as message catalog information.

Selecting and Reviewing CIP Codes

Access the Select CIP Code page.

Select CIP Code

Select from Student Records

Academic Career: Undergraduate

Academic Program: LAU

Academic Plan: MATHBA [27.0101](#)

Academic Sub-Plan:

[Select CIP Code page](#)

The page displays the student's academic program, academic plan, and academic sub-plan from the FA Term record. If a CIP code has been assigned at the program, plan, or sub plan level, it is displayed. Select one of the CIP code links to return to the main page with the selected CIP code now in use. The page can also be used to search for a CIP code by changing any of the edit box values.

Select from Student Records

Select this check box to look up the student's CIP code based on the source tables in Student Records that the FA Term build process uses.

This is useful when a student has multiple active programs, plans, or sub-plans. Use this to view the information and select the value that most accurately determines the student's eligibility for SMART.

When selected, the fields are empty and you can use the search fields to select the student attribute to view any assigned CIP codes for the selected value.

When the grant process is run, changes to any of the student's eligibility information usually result in a new row of eligibility information. This provides an audit trail of changes to the student's eligibility information. A new row is not created when the current row has an eligibility status of *Not Verified* and the grant process does not change the eligibility status, the equation group was not run for the student. Any changes in eligibility data updates the current record.

If the grant process inserts a new row of eligibility information, the Source displays as *System* and the field is in display mode. You must insert a new eligibility row to manipulate any of the field values.

Online Edits

If you set the student to *Eligible*, the following edits occur:

- The HERA academic level must be valid for the grant type.
- For an ACG record, an Eligibility Reason must be provided. If the eligibility reason is High School Program, you must provide the State program code.
- For a SMART record, the CIP code must be SMART eligible.

Disbursement Protection Edit

If a student has been awarded grant funds, the funds are disbursed for the term, the student's eligibility status is changed to *Ineligible* or *Ineligible, pending review*, and a warning message requests that you determine when disbursement protection should be maintained so that the disbursed amount will not be reduced by the Packaging process. By default, the disbursement protection setting is on for all students.

Reprocessing Ineligible Records

By default, the grant evaluation process continuously reprocesses records that do not have final grant eligibility status of *Eligible*, *Ineligible*, or *Cancelled*. Records with one of the following statuses are reprocessed until a final status is determined:

- *Not Verified*
- *Eligible, pending review*

- *Ineligible, pending review*

You can use the Include Ineligible Records run option to include records with a final status of *Ineligible* to be reprocessed. This option may be necessary to re-evaluate cases where a student was initially ineligible for a grant, but later become eligible based on additional information about the student.

For example, a student might have been ineligible to receive a SMART grant based on the student's major at the time the evaluation process was made. Later in the term, the student changes to an eligible major. If it is the school's policy to re-evaluate this change of eligibility, running the grant eligibility process with this option would re-evaluate the student.

With the Include Ineligible Records run option set on the Evaluate ACG/SMART Eligibility page, the evaluation process will follow the same selection and evaluation steps, but will include Ineligible status records. Equation groups must be used that include the evaluation rules.

Reprocessing Eligible Records

Eligible students can become ineligible during the term. For example, a student eligible for a SMART grant might change from an eligible major to an ineligible major. A student might be eligible for a grant based on a projected full time load, but during the term, stop maintaining that load. A student's HERA level can change based on recent transfer credit units received. The student's final GPA might not have been determined when the student was awarded a grant.

While these conditions would normally be caught during the disbursement authorization process, schools can use the Reprocess Eligible Records run option on the Evaluate ACG/SMART Eligibility page to have the grant evaluation process re-evaluate eligible student before running the disbursement processes.

With the Reprocess Eligible Records run option set, only eligible status records are selected and reprocessed. All other records will be skipped. New grant candidates will not be selected.

Students who have been awarded, but are now found to be ineligible, will need to be repackaged.

Students who have been awarded, but are now found to be *Ineligible, pending review* or *Eligible, pending review* cannot be disbursed or originated until a final status is determined.

If the student has been disbursed grant funds for the term and is now found to be ineligible, the school must determine if the student is able to keep the disbursed funds. The disbursement protection setting on the ACG/SMART Grant Eligibility page controls how the Packaging process will treat the award.

Implementing ACG/SMART Processing

Schools must carefully decide on how they will implement the delivered grant functionality for the 2007-2008 year. Consider the number of grant recipients you have, available staff resources, expertise in using the Equation Engine to write custom equations, and the timing of your implementation of the bundle features as you design your business process flow. This section discusses various options for implementing the delivered bundle features.

Although there are several options for accomplishing each business requirements for awarding HERA grants, you must enter eligible students in the new grant eligibility record structure to award, disburse, and originate the grants.

Business Process	Options/Benefits
<p>I. Identifying Grant Candidates (Initial entry into the ACG/SMART Grant Eligibility pages).</p>	<p>Option 1: 100 % manual entry into the eligibility page. Grant selection process not run.</p> <p>This option works for schools that have very few grant recipients who can be identified independent of the grant process, such as by query. With this option, the grant process would never be run.</p> <p>Eligible students can also be entered using an external file process. See Business Process II, Verifying Eligibility for Grants, Option 4.</p>
	<p>Option 2a: Run selection process to identify candidates and assign HERA academic level and/or CIP code. Students not selected can still be entered manually.</p> <p>This option would benefit schools that have too many grant candidates to enter manually.</p>
	<p>Option 2b: Run selection process to identify candidates. Use custom equations to assign HERA academic level and/or CIP code. Students not selected can still be entered manually.</p> <p>Similar to 2a, except custom equations are used to assign the HERA academic level and CIP code.</p>
<p>II. Verifying Eligibility for Grants</p>	<p>Option 1: Do not use equation groups to evaluate students. Review all manually. Update eligibility status for all.</p> <p>This option is for schools that want to review each student manually, such as a school that already has a process to determine eligibility and does not want to create equations to perform the same evaluation or a school with very few grant recipients.</p>
	<p>Option 2: Use or modify provided equations to perform most evaluations and determine eligibility for some candidates automatically. Manually review the remaining students. Requires the creation and use of equation groups.</p> <p>Schools can use various delivered equations to perform some eligibility checks, such as FT enrollment, Eligible CIP code, Pell recipient, but not allow equations to set a final eligibility status. To ensure that the equation groups cannot assign a final eligibility status, one equation must set the review flag.</p>
	<p>Option 3: Create additional equations to automate the review of most candidates. Review the rest manually. Requires the creation and use of equation groups.</p> <p>Requires extensive equation development to perform grant evaluations based on how the school collects eligibility information. The main benefit is that the majority of eligibility decisions can be made automatically.</p>
	<p>Option 4. Load eligibility information from an external data file.</p> <p>Schools that currently keep track of their student's eligibility information externally can load these directly into the eligibility tables by creating and loading an external flat file. The grant process would not need to be run.</p>
<p>III. Monitoring changes in eligibility status (ineligible to eligible)</p>	<p>Option 1: Identify changed statuses through an external method. Update eligibility data manually. This option is for schools with small grant populations, or schools that do not want to use the grant process to re-evaluate ineligible students using equations.</p>

Business Process	Options/Benefits
	Option 2: Use the grant process to reprocess ineligible students. This is an option for schools that already use equations to evaluate their students.
IV. Monitoring changes in eligibility status (eligible to ineligible)	Option 1: Use disbursement authorization to catch changes in eligibility during disbursement. Use the new HERA disbursement rules to verify that the student continues to meet the eligibility requirements for the grant.
	Option 2: Run the grant process with the Reprocess Eligible Records run option set on the Evaluate ACG/SMART Eligibility page. Schools should create new equation groups specific for this re-evaluation run. Because Reprocess Eligible Records run option does not add new records to the eligibility tables, schools that manually entered all of their eligible students could use this method.

Loading Grant Eligibility Information from an External File

Instead of running the grant evaluation process to populate the students' eligibility data, you can import students' grant eligibility information directly to the Grant Eligibility component using an external flat file. This is similar to the functionality provided for the 2007 aid year, but will load the student's grant eligibility information in the new record structure used for 2008 and future aid years.

The student's grant eligibility information will be generated by running the grant evaluation process, but due to the timing of the delivery of this functionality, you may not have enough time to design and create the equations necessary to run the grant process efficiently. If you have already been determining grant eligible students for 2008, you can use this method for entering their eligible students without running the delivered process until your equations are ready. If you have very few grant recipients, it would be more efficient to manually enter their eligible students.

This section provides the external file layout specifications and discusses how to:

- Generate the list of grant recipients using an Excel spreadsheet.
- Process the external file.

External File Layout Specifications

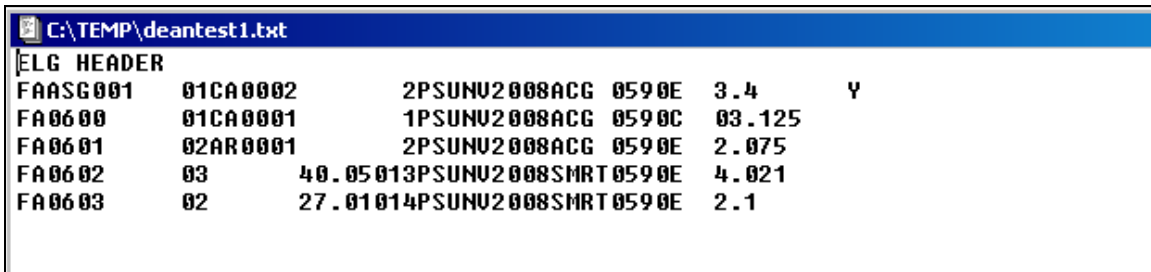
This is the format for the external file. The first row in the file contains ELG HEADER, which uniquely identifies the file to the FA INBOUND process.

Field	Field Length (fixed length)	Attributes
EMPLID	11	The student's EmplID This is a required field.
ELIGIBILITY PAYMENT REASON CODE	2	Reason eligible for ACG. Valid values are: 01 = High School Program 02 = Advanced Placement/International Baccalaureate Coursework 03 = Coursework Not required for SMART.
RIGOROUS HIGH	6	Description of a High School Program

Field	Field Length (fixed length)	Attributes
SCHOOL PROGRAM CODE		This field is only required if EligibilityPaymentReasonCode = 01. Not required for SMART.
CIP CODE	7	Qualifying SMART program. Not required for ACG.
ACADEMIC LEVEL	1	Used to populate Student Level Code COD field. Valid values are: 0 = 1st year, undergraduate/never attended college 1 = 1st year, undergraduate/attended college before 2 = 2nd year undergraduate/sophomore 3 = 3rd year undergraduate/junior 4 = 4th year undergraduate/senior For ACG, this value must be 0, 1, or 2. For SMART, this value must be 3 or 4.
INSTITUTION	5	Example: PSUNV. This is a required field.
AID YEAR	4	Example: 2008. This is a required field.
GRANT TYPE		ACG or SMRT. This is a required field.
TERM	4	The term value. For example - 0590 (Fall 2007). This is a required field.
ELIGIBILITY STATUS (1)	1	Student's grant eligibility status for the term. Valid values are: C – Cancelled E – Eligible, usually used I – Ineligible N – Not Verified R – Eligible, pending review X – Ineligible, pending review This is a required field.
ACADEMIC LEVEL OVERRIDE	1	Indicates that the HERA academic level has been overridden. Valid values are Y and blank. Not usually used.
CIP CODE OVERRIDE	1	Indicates that the CIP code has been overridden from the derived value. Valid values are Y and blank. Not usually used.
GPA	9 nnnnn.nn	The student's GPA captured at the time eligibility is determined.

Field	Field Length (fixed length)	Attributes
GPA OVERRIDE		Indicates that the GPA has been overridden. Valid values are Y and blank. Not usually used.

This is an example of an external file.



External file sample

Generating the List of Grant Recipients Using an Excel Spreadsheet

Here is an example of how the external file can be generated if your grant students are maintained in an Excel spreadsheet. You might have a better or easier method for generating the flat file. A copy of the actual Excel file can be requested from the Oracle Global Support Center

Step 1: Create a spreadsheet with the external file fields and enter your eligible students.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	EMPLID	Elig Rsn	Proc Cd	CIP	Ac Level	Institution	Aid Year	Grant Typ	Term	Elig Statu	Ac Lvl Ovr	CIP Cd Ovr	GPA	GPA Ovr
1	12345678901	01	CA0002	14.0901	2	PSUNV	2007	ACG	580	E	Y		3.4	Y
2	FAD0089	01	CA0001		1	PSUNV	2007	ACG	570	C	N		23	
3	FAD0103	02	AR6001		2	PSUNV	2007	ACG	0580	I		Y	12345	Y
4	FAD0125			26.0406	3	PSUNV	2007	SMRT	0570	V		N	12345.678	

All cells are formatted as text.

Step 2: Paste this function in cell V2.

=CONCATENATE(A2,(REPT(" ",11-LEN(A2))),B2,(REPT(" ",2-LEN(B2))),C2,(REPT(" ",6-LEN(C2))),D2,(REPT(" ",7-LEN(D2))),E2,(REPT(" ",1-LEN(E2))),F2,(REPT(" ",5-LEN(F2))),G2,(REPT(" ",4-LEN(G2))),H2,(REPT(" ",4-LEN(H2))),I2,(REPT(" ",4-LEN(I2))),J2,(REPT(" ",1-LEN(J2))),K2,(REPT(" ",1-LEN(K2))),L2,(REPT(" ",1-LEN(L2))),M2,(REPT(" ",9-LEN(M2))),N2,(REPT(" ",1-LEN(N2))))

	J	K												
	Elig Status	Ac Lvl Ovr												
1	E	Y		3.4	Y									
2	C	N		23										
3	I		Y	12345	Y									
4	V		N	12345.678										

Spreadsheet with formula in cell V2.

Step 3: Paste the function in the remaining rows in column V (except for V1).

Copy V2 and use the paste special function for formulas. Enter the formula down the column in every row except V1.



J	K	L	M	N	O	P	Q	R	S	T	U	V
Elig Status	Ac Lvl	Ovr	CIP Cd	Ovr	GPA	GPA Ovr						ELG HEADER
E					3.4	Y						FAASG001 01CA0002 2PSUNV2008ACG 0590E 3.4 Y
C					03.125							FA0600 01CA0001 1PSUNV2008ACG 0590C 03.125
E					2.075							FA0601 02AR0001 2PSUNV2008ACG 0590E 2.075
E					4.021							FA0602 03 40.05013PSUNV2008SMRT0590E 4.021
E					2.1							FA0603 02 27.01014PSUNV2008SMRT0590E 2.1

Spreadsheet with formula in column V.

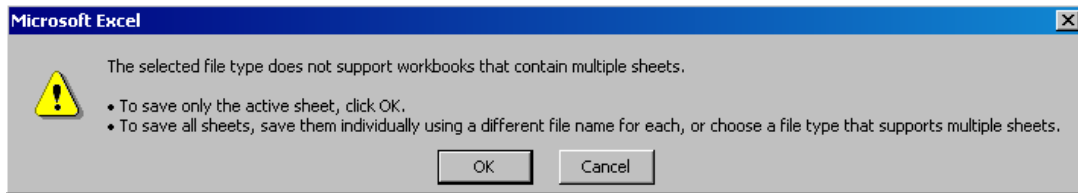
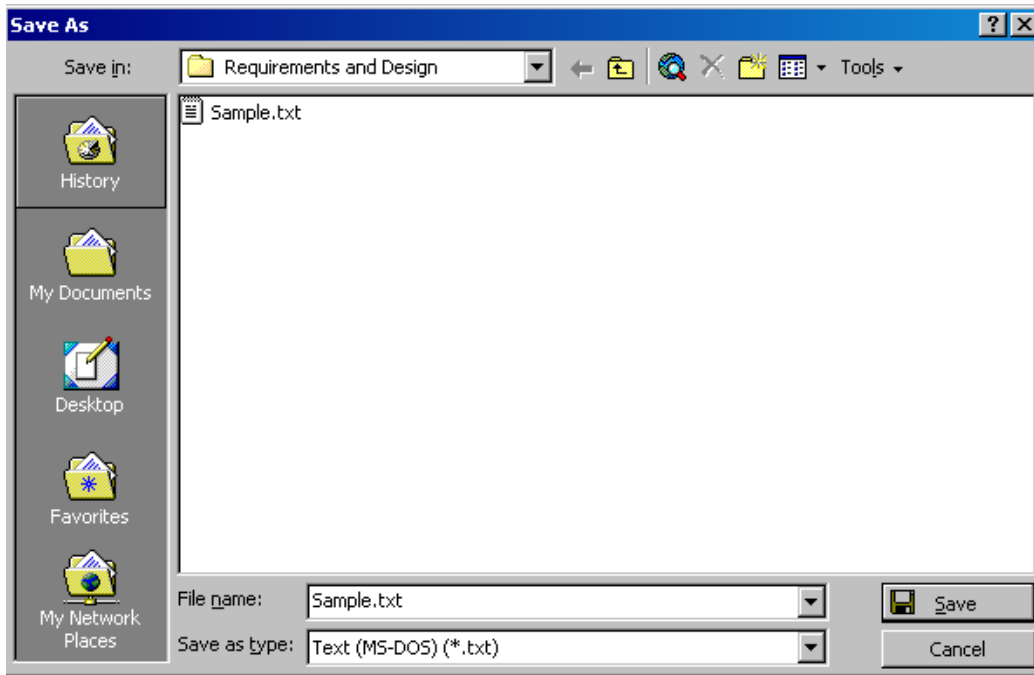
Step 4: Copy the column V and paste to a new worksheet.

Do a Copy and then Paste Special (values only) to the new sheet.

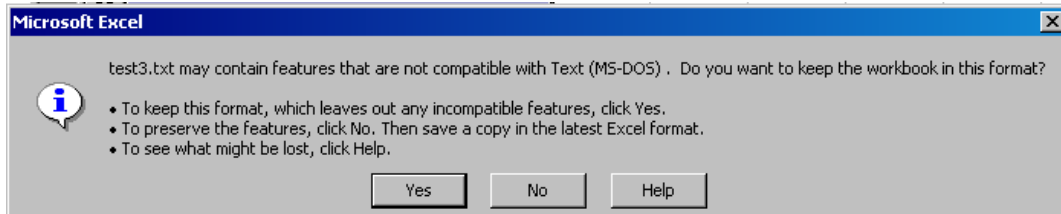
	A											
1	ELG HEADER											
2	FAASG001	01CA0002		2PSUNV2008ACG	0590E	3.4	Y					
3	FA0600	01CA0001		1PSUNV2008ACG	0590C	03.125						
4	FA0601	02AR0001		2PSUNV2008ACG	0590E	2.075						
5	FA0602	03	40.05013	PSUNV2008SMRT0590E	4.021							
6	FA0603	02	27.01014	PSUNV2008SMRT0590E	2.1							
7												

Data in new spreadsheet.

Step 5: Save the new sheet as Text (MS-DOS).



Click OK.



Click Yes.

Step 6: Verify output.

The file should look like this:

```

C:\TEMP\deantest1.txt
ELG HEADER
FAASG001 01CA0002 2PSUNU2008ACG 0590E 3.4 Y
FA0600 01CA0001 1PSUNU2008ACG 0590C 03.125
FA0601 02AR0001 2PSUNU2008ACG 0590E 2.075
FA0602 03 40.05013PSUNU2008SMRT 0590E 4.021
FA0603 02 27.01014PSUNU2008SMRT 0590E 2.1
    
```

External File Example

Processing the External File

After creating the external file, use the FA Inbound process to process the file.

Access the FA Inbound page.

FA Inbound

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

Run Option: Single File File List

Inbound File:

ISIR TG Number:

FA Inbound page

The FA Inbound process will recognize the grant file by reading the first row of the file and recognizing that the first row contains ELG HEADER beginning at the first position.

The data from the file is used to create grant eligibility rows in the ACG/SMART Grant Eligibility component. A message is also entered in the component indicating that the data was loaded from an external file.

Data validation is performed and where data already exists in the table, the record is skipped.

Writing Equations for ACG/SMART Eligibility

This section provides an overview and discusses how to:

- Design HERA equations.
- Write equations for specific grant functions.
- Use delivered equations for HERA eligibility evaluation.

Understanding Equations Used for HERA Grant Evaluation

This section describes the components required in HERA equations:

- Equation groups.
- Equation Engine variables.

- Evaluation of equation results.

Equation Groups

Use one equation group per award type (ACG1, ACG2, SMART1, SMART2). Within the equation group, specify the order to run the equations by setting the sequence.

Equation Engine Variables

The global variables listed here are available to all equations in the equation group.

These global variables are passed in and can be updated by an equation:	These global variables are examined upon return from each equation:
EMPLID INSTITUTION AID_YEAR STRM TABLE_ID (hardcoded value of '1') SFA_ASG_ACAD_LEVEL SFA_ASG_ACLVL_OVRD SFA_COD_ELIGRSN_CD SFA_COD_HS_PROG_CD CIP_CODE SFA_ASG_CIPCD_OVRD GPA SFA_ASG_GPA_OVRD SFA_ASG_DISB_PRTCT REVIEW_FLAG (valid values: blank or "Y")	RESULT MESSAGE_SET_NBR MESSAGE_NBR

The global variables RESULT, MESSAGE_SET_NBR and MESSAGE_NBR are reset before each equation call.

All other global variables are set before the first equation of an equation group is called.

If an equation updates the value of a global variable (other than RESULT, MESSAGE_SET_NBR, and MESSAGE_NBR), the new value is passed on to any subsequent equations that are called.

After all equations in an equation group have been executed, any changes to the global variables (other than EMPLID, INSTITUTION, AID_YEAR, STRM, TABLE_ID, REVIEW_FLAG, RESULT, MESSAGE_SET_NBR, and MESSAGE_NBR) are saved in the Eligibility tables.

Any MESSAGE_SET_NBR and MESSAGE_NBR values generated by each equation are saved in the Eligibility tables.

Evaluation of Equation Results

Results from all Equations called will be evaluated with an AND condition.

- If an equation returns a blank RESULT, it will not be included in the AND condition.
- If all equations return a RESULT of PASSED, the student status will be *Eligible*.

- If one or more equations return a RESULT of FAILED, the student status will be *Ineligible*.
- If one or more equations return a RESULT of UNDETERMINED, and all other equations returned a RESULT of PASSED, the student status will be *Eligible, pending review*.
- If the REVIEW_FLAG is set to Y, the student status will be *Eligible, pending review* or *Ineligible, pending review*.

Examples of Equation Group RESULTS:

Equation1	Equation2	Equation3	EquationN	REVIEW_FLAG	Student Eligibility Status
PASSED	PASSED	PASSED	PASSED		Eligible
PASSED	PASSED	UNDETERMINED	PASSED		Eligible Pending Review
FAIL	FAIL	FAIL	FAIL		Ineligible
FAIL	PASSED	PASSED	PASSED		Ineligible
PASSED	FAIL	UNDETERMINED	UNDETERMINED		Ineligible
FAIL	UNDETERMINED	UNDETERMINED	UNDETERMINED		Ineligible
UNDETERMINED	UNDETERMINED	UNDETERMINED	UNDETERMINED		Eligible Pending Review
PASSED	PASSED	PASSED	PASSED	Y	Eligible Pending Review
PASSED	PASSED	UNDETERMINED	PASSED	Y	Eligible Pending Review
FAIL	FAIL	FAIL	FAIL	Y	Ineligible Pending Review
FAIL	PASS	PASSED	PASSED	Y	Ineligible Pending Review
PASSED	FAIL	UNDETERMINED	UNDETERMINED	Y	Ineligible Pending Review
FAIL	UNDETERMINED	UNDETERMINED	UNDETERMINED	Y	Ineligible Pending Review
UNDETERMINED	UNDETERMINED	UNDETERMINED	UNDETERMINED	Y	Eligible Pending Review

Designing HERA Equations

You can design equations to:

- Update an existing field in the eligibility record. For example, an equation can set the GPA value.
- Post non-evaluation related messages to the user.
- Set a review flag to ensure a student is reviewed.
- Execute in a set sequence so that the results of one equation can be used by later equations.

All equations must pass back a message (message set number and message number) so that it can be displayed to the user.

Equations that perform evaluations for grant eligibility must pass back a result (PASSED, FAILED, UNDETERMINED) AND a message (message set number and message number).

Creating Equation Groups for special processes

You can create special equation groups to evaluate special business processes such as a census re-evaluation of eligibility or renewing eligibility for subsequent terms. These may not require the same equations used to make the initial eligibility determination. For example, you could create a special equation group for students already made eligible that would perform census date re-evaluations that only check the student's current enrollment and GPA.

Updating fields in the grant eligibility record

To update fields in the eligibility record, simply set the corresponding global variable for the field you need updated with your value. If you use equations that will use an eligibility record field that has been updated by another equation, ensure that the equations are executed in the correct sequence. The grant eligibility status field cannot be set by an equation.

Using the override fields on the eligibility record

If you write equations that will update those fields with a corresponding override field, such as HERA Academic Level, CIP Code, or GPA, add logic to check the override field setting and not replace the current value as needed.

Writing Equations for Specific Grant Functions

Here are some guidelines on writing equations for the grant process.

Equations designed to evaluate grant eligibility criteria must generate a RESULT and message (message set number and message number). The possible result can be PASSED, FAILED, or UNDETERMINED:

- Use PASSED if the student meets the conditions of the equation.
- Use FAILED if the student not only does not meet the conditions of the equation criteria, but also makes the student ineligible for the grant.
- Use UNDETERMINED if the criteria of the equation is not met, but you do not want to assign FAILED, such as cases where not enough information is available to make a PASSED or FAILED result, but information will be received so that a final result can be determined.

For each result, set a corresponding message catalog entry. The message will appear on the ACG/Grant Eligibility pages to communicate how the equation result was determined.

The overall grant eligibility status is based on the evaluation of results from all equations in the equation group. You can write several simple individual equations to pass information. These equations do not determine the student's eligibility status for the grant themselves, but as a part of the equation group.

Requiring a student to be reviewed

The REVIEW_FLAG variable field automatically forces a record to be resolved by manual review. When the grant process reviews all equation group results, if any equation sets the REVIEW_FLAG to Y, the status will be either *Eligible, pending review* or *Ineligible, pending review*.

Note that these status values can be set without setting the REVIEW_FLAG. You can create an equation that determines if the student is a new transfer student and set the review flag to force the record to be reviewed so that the GPA calculation is performed manually.

Equation security

For information on equation security, see the “Equation Engine Security” section in the *Equation Engine Programmer’s Guide*.

Equation naming convention

Equations created for grant processing must begin with **FAAS** in order to be selected for use in equation groups.

Using Delivered Equations for HERA Eligibility Evaluation

The following equations were created to test the Campus Solutions grant review process. Some might be applicable for use at your institution. Others might be used to develop similar equations that are more applicable based on your business requirements.

Completed Equations

Equation Name	Description	Results
FAASSCIPFATM	Uses the CIP Code source and the student’s academic program, plan, and sub-plan information stored in FA Term to determine the CIP code. The equation does not verify that the CIP code is SMART eligible.	Will assign the student’s CIP code.
Design notes	This should be the default equation used by most schools to determine the CIP code. This equation is intended to be assigned on the ACG/SMART Processing Options page and should not be used in equation groups. The equation currently passes a result and messages, but because it is not called from an equation group, they will not appear on the page. This does not affect how the equation determines CIP code.	
Suggested local modification	None.	

Equation Name	Description	Results
FAASSCIPELIG	Evaluates the student's CIP code stored in the grant tables for SMART eligibility.	PASSED: CIP code is SMART eligible. FAILED: CIP code is not eligible or CIP code is blank.
Design notes	This should be a mandatory equation for SMART equation groups.	
Suggested local modification	Will eventually need to add logic for handling renewal awards where the qualifying CIP code is no longer eligible for new awards. Currently there are no CIP codes that lose eligibility for SMART.	

Equation Name	Description	Results
FAASSPELLELG	Verifies that the student is Pell eligible based on current ISIR data.	PASSED: Student is Pell eligible. FAILED: Student is not Pell eligible. UNDETERMINED: An ISIR does not exist.
Design notes	Equation finds the last official ISIR loaded and determines if the PS_ISIR_CONTROL.PELL_ELIGIBILITY field value is Y.	
Suggested local modification	None.	

Equation Name	Description	Results
FAASSFTLOAD	Verifies that the student's FA load in FA Term is full time.	PASSED: Student is full time. FAILED: Student is not full time.
Design notes	Equation gets the current FA_LOAD value from FA Term to verify full-time status. Useful before the student enrolls for the term. After the term begins, switch to monitoring the current load in FA term.	
Suggested local modification	None.	

Equation Name	Description	Results
FAASSCURLOAD	Verifies that the student's current load in FA Term is full time.	PASSED: Student is full time. FAILED: Student is not full time.
Design notes	Equation gets the current FA_LOAD_CURRENT value from FA Term to verify full-time status. Useful once the term has begun. Can be used as part of a census re-evaluation.	
Suggested local modification	None.	

Equation Name	Description	Results
FAASSNSLDSG	Checks the NSLDS history tables for previously reported ACG eligibility.	No results are set.
Design notes	This equation will set the REVIEW_FLAG if ACG history data exists. This causes the record to be reviewed manually to complete the review. A message will also appear on the grant eligibility page.	
Suggested local modification	Can be modified to read the eligibility criteria met and use the same values for the current eligibility record.	

Equation Name	Description	Results
FAASSCRTMGPA	Assigns the GPA from Term History (PS_STDNT_CAR_TERM.CUM_GPA).	No results are set.
Design notes	Messages will appear on the grant eligibility page to indicate if the GPA was updated. The equation respects the GPA override.	
Suggested local modification	Calculate a new GPA based on manipulating the STDNT_CAR_TERM enrollment information.	

Equation Name	Description	Results
FAASSTERMGPA	Assigns the student's GPA from the cumulative GPA field on FA Term.	No results are set.
Design notes	Messages will appear on the grant eligibility page to indicate if the GPA was updated. The equation respects the GPA override.	
Suggested local modification	Modify to use the calculated GPA if an override GPA is not acceptable to use.	

Equation Name	Description	Results
FAASDACG2GPA	GPA check for ACG2 recipients.	PASSED FAILED UNDETERMINED
Design notes	<p>The equation performs the same check as disbursement authorization does for ACG2 recipients. It looks for the earliest FA Term record that the student was enrolled where the beginning of term HERA level is 1 and the end of term level is 2. The GPA threshold is hard coded for 3.0.</p> <p>If no FA Term record that meets the criteria can be found, UNDETERMINED is set. This may be a new transfer student or one who had not applied for financial aid in previous terms.</p>	
Suggested local modification	<p>Modify the GPA if your school uses a different grading scale.</p> <p>Modify the beginning of term HERA level to include 0 – 1st year, never attended.</p>	

Equation Name	Description	Results
FAASDCITIZEN	Verifies the student's citizenship.	PASSED FAILED UNDETERMINED
Design notes	<p>Equation verifies that the reported citizenship on the current official ISIR row is US Citizen and checks the SSA DB Match value. If the value is not A or blank, then the equation verifies that the SSA override has been set.</p> <p>Select the current effective dated row in PS_ISIR_STUDENT where CITIZENSHIP_STATUS = 1 AND (PS_STDNT_AID_ATRBT.SSA_CITIZENSHIP_IND in ('A', ' '), or SSA_CITIZEN_OVRD = Y)</p> <p>If the conditions are met, then PASS. If the conditions are not met, then FAIL. If no data exists in PS_ISIR_STUDENT or PS_STDNT_AID_ARTBT, then UNDETERMINED.</p> <p>A different message will appear depending on the result.</p>	
Suggested local modification	<p>Equation does not take into account cases where the student's current ISIR does not report the student as a US Citizen (CITIZENSHIP_STATUS is not 1). Can make this an OR condition and add addition validation such as verifying the citizenship status in the core records.</p>	

Equation Templates

Many of the following equations were created based on customer input and are intended as examples of how to accomplish a specific evaluation. They are not intended to function at your institution without modification. You should create new equations to use any of the described functionality.

Equation Name	Description	Results
FAASDACGCHKL	ACG eligibility determined based on the student having a completed checklist.	PASSED (and REVIEW_FLAG is set to Y) UNDETERMINED
Design notes	<p>A customer suggested this equation during the Alliance conference.</p> <p>The equation assumes that a completed ACG checklist indicates that the student is eligible. The REVIEW_FLAG is set so that the user must review the student's information to determine the actual eligibility criteria the student met. No review of the checklist items is performed.</p>	
Suggested local modification	<p>Schools must create a new SQL statement to replace the delivered FAAS_COMPLETE_CHKLIST_EXIST if they will use different checklist names.</p> <p>If a school were to use checklists as the only method for determining ACG eligibility, this could be further enhanced by:</p> <ul style="list-style-type: none"> • Creating unique Checklist Items that represents the actual condition that the student met to be eligible for ACG – HS program, AP/IB, rigorous coursework. The equation could be modified to assign the eligibility reason code based on the existence of the relevant checklist item. If this were done, the REVIEW_FLAG would not need to be set. The State program code could be assigned as well. • Creating a unique message if the checklist exists, but the checklist is not complete. This would probably pass UNDETERMINED status, but a new message number, such as: <code>ACG grant checklist exists, but is currently in progress.</code> 	

Equation Name	Description	Results
FAASDACGISIR	Determines if the student self reported ACG eligibility on the ISIR. Makes ineligible for ACG if the student did not self-report.	PASSED FAILED
Design notes	<p>A customer suggested this equation during the Alliance conference.</p> <p>If an ACG self-identifying comment does not exist, the FAILED status makes the student ineligible.</p> <p>The equation checks all loaded ISIRs for the student for the existence of comments 267, 268, 269, or 270. If any were received, the equation passes. If none exist, the equation fails.</p>	
Suggested local modification	<p>This equation can be modified so that it is merely informational and a message will appear on the Grant Eligibility page. Do not set the RESULT to FAILED if no comment exists. Set no result.</p> <p>Can be modified to only check the current loaded ISIR for comments.</p> <p>Can check the ISIR staging tables instead of only the loaded ISIR data.</p>	

Equation Name	Description	Results
FAASDACGRIG	Checks to see if the student meets the ED eligibility criteria for ACG based on External Education, External Subject information.	PASSED FAILED UNDETERMINED
Design notes	<p>This equation is based on a current customer practice. This assumes that the school will update the student's external education records with ACG-specific external subject codes after review by staff.</p> <p>Each external subject code indicates the eligibility criteria met by the student. The codes and their meaning are:</p> <p>ACG1 – Student meets state scholars requirement. ACG2 – Student meets ED high school ACG requirement. ACG3 – Student meets the AP/IB ACG requirement. ACG4 – Student not eligible for ACG.</p> <p>Based on the entered code, the ACG Eligibility reason field can be set by the equation, as well as the state High School program code. Currently the equation only sets ACG Eligibility Reason Code 1 (if ACG1 is posted), but can be modified to set 2 (if ACG3 exists) and 3 (if ACG2 exists).</p> <p>If none of the external subject codes are found, the equation passes an UNDETERMINED status, which prevents a final status from being updated by the process. This assumes that all ACG candidates will have one of these codes to indicate eligibility.</p> <p>The equation looks at the external subject table without regard to what type of external data is present.</p>	
Suggested local modification	In addition to modifying the external subject codes you will use (and creating a new equation SQL routine), if you can determine the high school program code to assign, that logic can also be entered. This can be accomplished by creating additional external subject codes.	

Equation Name	Description	Results
FAASDACSGRP	ACG eligibility check using student groups.	PASSED (and REVIEW_FLAG is set to Y) FAILED UNDETERMINED
Design notes	<p>This equation was suggested by a few schools based on how they currently track whether or not a student is eligible for ACG. The equation is designed to identify if the student has an eligible student group. If so, the review flag is set so that the record must be reviewed manually in order to indicate the ACG eligibility reason code required by COD. If the student has an ineligible student group value, the student is made ineligible. If no student group data exists, the STATUS is set to UNDETERMINED, which will prevent the system from automatically setting a final eligibility status.</p> <p>Two student groups were created: ACG1 to represent ACG eligibility and ACG4 to represent ineligibility for ACG. The equation checks for the existence of these student groups. If none exists, UNDETERMINED is set so that the record will be reprocessed again. If ACG1 exists, PASSED is set with the REVIEW_FLAG. This would cause an Eligible, pending status (assuming all other equations passed) so that a manual review can be performed and the actual eligibility criteria determined. If ACG4 is found, FAIL is set, which makes the record ineligible.</p>	
Suggested local modification	<p>The equation searches for only two student groups. This can be expanded to handle more student group codes.</p> <p>If a student group value is tied to a specific ACG eligibility reason code, then this value can be assigned by the equation and written to the eligibility table. If this is done, then the setting of the REVIEW_FLAG may not be necessary.</p> <p>If not all ACG candidates will use student groups to determine eligibility, you could modify the equation to not set an UNDETERMINED result if no group exists.</p>	

Equation Name	Description	Results
FAASDAPTEST	ACG check to see if the student has met the AP requirement for ACG by examining the external test score tables.	PASSED FAILED none
Design notes	<p>This checks the PS_STDNT_TEST_COMP tables for records where the TEST_ID = AP when the SCORE is greater than or equal to 3.0. This table is populated by the external test score load process.</p> <p>If two or more AP rows that meet the criteria are selected, the equation PASSED. If not, then it FAILED. If no rows exist, no result is set.</p>	
Suggested local modification	<p>Equation might need to be modified to only check scores that are accepted by the school. The equation currently checks all loaded test scores that are AP.</p> <p>If IB scores can also be loaded into this record, then modify the equation to include IB test scores.</p>	

Equation Name	Description	Results
FAASDAPTSTEX	ACG check to see if the student has met the AP or IB requirement for ACG by examining the student's external transcript data.	PASSED FAILED none
Design notes	The equation uses SQL routines to check the PS_EXT_ACAD_SUBJ for AP and IB subjects. If no subjects exist, no result is set and a message is posted. If subjects exist, the equation will pass or fail based on the selected rows.	
Suggested local modification	Equation uses the external GPA value as the basis of the AP/IB score. This might need to be modified if schools capture the score elsewhere in the record.	

Equation Name	Description	Results
FAASDCKHERAL	HERA level check. The student's level is calculated without test credits and compared with the current HERA level. If different, the REVIEW FLAG is set.	PASSED FAILED (and REVIEW_FLAG is set to Y)
Design notes	This equation calculates the HERA level by taking the total cumulative units and subtracting all test credit units. Using the same level rule as the FA Term process, the HERA level is determined and then compared with the FA Term calculated level. If they do not match, then a FAILED result is set and the REVIEW_FLAG is set to Y. If the levels match, PASSED is the result. If no STDNT_CAR_TERM record exists, UNDETERMINED is the result.	
Suggested local modification	Modify to perform an alternate total number of completed units value that your school prefers to use.	

Equation Name	Description	Results
FAASDGRADDT1	High School graduation date check from the external education (transcript) tables.	PASSED FAILED UNDETERMINED
Design notes	<p>Because this structure does not actually have a graduation date field, some customers use the PS_SFA_EXT_ACAD.TO_DT field for this purpose. The equation checks the TO_DT for all records where EXT_CAREER = HS. Based on the student's level, the high school graduation date requirement will differ. If a high school record exists with no TO_DT value, the result is UNDETERMINED. If the TO_DT exists, the equation will result in either PASSED or FAILED.</p> <p>Level 0,1: 01/01/06 and after Level 2: 01/01/2005 and after</p>	
Suggested local modification	Additional criteria might be added to further validate the transcript information. You might combine this equation with FAASDGRADDT2.	

Equation Name	Description	Results
FAASDGRADDT2	High school graduation check from the admissions application.	PASSED FAILED UNDETERMINED
Design notes	<p>This equation looks at the admissions application data structure for the graduation date at the last school attended. The school must belong to a specific user-defined school type. Based on the student's level, the high school graduation date requirement will differ. If no high school record exists, the result is UNDETERMINED. If the GRADUATION_DATE exists, the equation will result in either PASSED or FAILED.</p> <p>Level 0,1: 01/01/06 and after Level 2: 01/01/2005 and after</p>	
Suggested local modification	<p>The school type defined in the equation will need to be modified. You might combine this equation with FAASDGRADDT1.</p>	

Equation Name	Description	Results
FAASDINCMLPT	Checks to see if the student has an incomplete graded course in a past term. If one exists, set the REVIEW_FLAG and post message.	None.
Design notes	<p>You might want to run this prior to running disbursements as part of a Census process run to stop disbursements for previously approved SMART recipients.</p>	
Suggested local modification	<p>SQL might need to be updated to modify the grade marks that represent an incomplete grade at your school. Currently, 'I' and blank are hard-coded in the SQL. May want the SQL to not include any courses in the same term as the equation is evaluating. Modify the equation to set a FAILED result instead of only setting the review flag.</p>	

Special Use Equations

Equation Name	Description	Results
FAASDCIPSR	Determines the CIP code the same as in FAASCIPFATRM, except that it uses the student's program, plan, and sub plan information in Student Records rather than the Financial aid Term record. The equation does not verify that the CIP code is SMART eligible.	None.
Design notes	<p>This is an alternate CIP code equation intended as an example of using non FA Term information to determine the CIP code. This equation is not intended to be used in equation groups, but is set on the ACG/SMART Processing Options page.</p>	

Suggested local modification	The equation is coded to get the same results as the FAASCIPFATRM equation. Additional modification is required in order to determine which code to select when the student has multiple programs, plans, or subplans.
-------------------------------------	--

Equation Name	Description	Results
FAASDHERALVL	Alternate HERA level calculation that does not include test credits in the total units used to calculate the student's level.	None.
Design notes	<p>An alternate equation that is set on the ACG/SMART Processing Options page. If not used, the HERA level calculated by the FA Term process will be used. This will calculate and assign the student's HERA level stored in the grant record.</p> <p>This is similar to the equation FAASDCKHERAL.</p> <p>If used, may cause conflicting level values between the grant record and FA Term. The FA Term value must match in order for awarding and disbursements to function.</p> <p>Requires a STDNT_CAR_TERM record for each student in order to determine level.</p>	
Suggested local modification	<p>Modify to derive a total completed units based on your institution's requirements.</p> <p>Modify to take into account when student has not yet been matriculated.</p>	

Equation Name	Description	Results
FAASDACGDRVR	ACG Driver Equation. Calls multiple existing equations for an ACG eligibility determination.	PASSED FAILED UNDETERMINED
Design notes	<p>For the ACG grant, the student only needs to meet one of the rigorous study requirements to become eligible. This conflicts with the equation group evaluation logic. If one failed, then the eligibility status would become <i>Ineligible</i> (or <i>Ineligible, pending review</i> if the review flag was set). This equation reviews the results for each equation called and will set a PASSED status if any equation passes.</p> <p>This equation processes the results for each attached equation in sequence. Once a PASSED result occurs, the driver equation stops. If no called equation passes, then if one resulted in UNDETERMINED, the driver equation will result in UNDETERMINED. If none resulted in UNDETERMINED, then the driver equation will result in FAILED.</p> <p>This equation demonstrates how to call the following equations: FASSDAPTEST, FAASDAPTSTEX, FAASDACGRIG, FAASDACGCHKL, FAASDACGSGRP.</p> <p>Equations that are added must be able to set a result status of PASSED, FAILED, and UNDETERMINED.</p> <p>Any individual equation called from this main equation should not be used in the same equation group, as it will already be called.</p> <p>An example equation group using this driver equation would contain:</p> <ul style="list-style-type: none"> • FAASDACGDRVR – to determine if the ACG requirement is met. • FAASSPELLELG – Pell check. • FAASDCITIZEN – US Citizenship check. • FASSFTLOAD – Full time load check. 	
Suggested local modification	Schools will need to add the equations they need to be executed.	

Changes to NSLDS Aggregates for ACG/SMART

National Student Loan Data System (NSLDS) has been updated to reflect the Higher Education Reconciliation Act of 2005 (HERA).

This section provides an overview and discusses how to map aggregate area limits to NSLDS aggregate categories.

Understanding NSLDS Aggregates for ACG/SMART

The Common Origination and Disbursement (COD) system reports ACG and SMART grants to NSLDS daily. NSLDS data is provided to schools as part of ISIR data or from a Financial Aid History (FAH) data file:

- NSLDS data in the ISIR output has up to three sequences of data each for ACG and SMART grant types. Sequences are not limited by award year like the Pell Grant data. NSLDS will determine the three most relevant ACG and SMART grants to include on the ISIR. If there are more than three grant sequences, a flag on the ISIR will instruct schools to view the NSLDS website for additional information. See NSLDS Newsletter #14 for more information.

- Financial Aid History Record Type 3-Overpayment data and Record Type 4-Grant data have been updated to include a complete aggregate history of ACG and SMART transactions.

As of Campus Solutions version 8.9, Financial Aid provides the option for schools to direct the Packaging process to consider NSLDS aggregate aid information. Schools on 8SP1, should review and update their current procedures to accommodate the assessment of NSLDS financial aid history (or aggregate) data for the ACG and SMART grant programs. Schools will need to create aggregate aid limits for ACG and SMART, and then manually update the Aggregate Aid Data page to ensure all prior ACG and SMART awards are accounted for. See Changes to Packaging for Item Type and Aggregate Area setup.

Changes to Packaging for ACG/SMART

Changes to the Packaging process include ACG and SMART Grants.

To include ACG and SMART grants in your packaging plans, you must follow instructions in the given sequence because of the dependencies associated with the various areas of setup.

This section provides an overview and discusses how to:

- Set up item types for ACG and SMART.
- Add the HERA academic level to the aggregate level cross-reference table.
- Create aggregate aid limits.
- Set up Financial Aid item types.
- Update existing ACG/SMART aggregate areas.

Understanding Packaging Rules for ACG and SMART Awards

The setup requires that you:

- Set up an Item Type based on academic level for each ACG and SMART program (for example, ACG1, ACG2, SMART1, and SMART2).
- Populate the Aggregate Level Cross Reference Table with the new HERA Academic Levels.
- Create four new Aggregate Areas to support the tracking of the ACG and SMART academic level limits (for example, ACG1, ACG2, SMART1, and SMART2).

Eligibility ACG and SMART awards is determined from the following:

- From ISIR: Pell Eligibility

If the Pell Eligibility Flag is not equal to Y, the student will not be awarded an ACG/SMART grant.

- From FA Term: FA Load and HERA Academic Level Beginning of Term.

The Packaging process compares FA Term HERA Academic Level Beginning of Term field against the ACG/SMART HERA Student Level to ensure they agree. If they don't agree, no award is granted for that term.

If the student is not full-time for a given term, the system will not award ACG/SMART for that term.

- From ACG/SMART Grant Eligibility record: Eligibility Status, HERA Student Level.
- From Incoming Aggregates: Aggregate Area, Aid Year, Aggregate Level, Award Amount, Undergraduate Lifetime Total.

Disbursement Plan

Other programs use term-specific disbursement plans to award for a given term, such as Spring-only term awarding. But for ACG/SMART awarding, you can use a disbursement plan that spans all terms within the award period. The Packaging process automatically evaluates the ACG/SMART eligibility records and awards to the corresponding term or terms regardless of the Split Code specified based on the student's HERA academic level.

For example, if you have a Disbursement Plan/Split Code that spans both the Fall and Spring terms, such as 01/01, in the Academic Award Period, and if the student is eligible for ACG2 in Term 1 and SMART1 in Term 2, you can use the same Disbursement Plan (01) for both ACG2 and SMART1. You do not need to specify a Fall-only Disbursement Plan for ACG1 and a Spring only Disbursement Plan for ACG2. Provided that your packaging plan includes both ACG1 and ACG2 as awarding rules, the Packaging process will return a \$650 ACG2 award with a Disbursement Plan of 01/01 for Term 1 and a \$2,000 SMART1 award with a Disbursement Plan of 01/01 for Term 2.

Student Aid Package
Need Summary
Term Summary

Jerone,Paulson A

Aid Year: 2008 Federal Aid Year 2007 - 2008

ID: FAPKASG0035

Institution: PSUNV

Career: Undergraduate

Award Period:

Package Status:

Packaging Plan ID:

Award Notification

Student Aid Package

Award
Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10	<input type="checkbox"/>	UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	XX	Disbursement <input type="button" value="+"/>
20	<input checked="" type="checkbox"/>	UGRD	900000000220	ACG1_SEM	0.00	0.00	01	01	Disbursement Message <input type="button" value="+"/>
30	<input type="checkbox"/>	UGRD	900000000221	ACG2_SEM	650.00	650.00	01	01	Disbursement <input type="button" value="+"/>
40	<input type="checkbox"/>	UGRD	900000000222	SMART1_SEM	2,000.00	2,000.00	01	01	Disbursement <input type="button" value="+"/>
50	<input checked="" type="checkbox"/>	UGRD	900000000223	SMART2_SEM	0.00	0.00	01	01	Disbursement Message <input type="button" value="+"/>
60	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	Disbursement <input type="button" value="+"/>
70	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	Disbursement <input type="button" value="+"/>
80	<input type="checkbox"/>	UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	Disbursement <input type="button" value="+"/>
90	<input type="checkbox"/>	UGRD	900000000304	Sub Staff - Sem	3,500.00	3,500.00	01	01	Disbursement <input type="button" value="+"/>
100	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	1,290.00	1,290.00	01	01	Disbursement <input type="button" value="+"/>

Example Disbursement Plan

Award Disbursement Detail

Sequence: 30 Item Type: 900000000211 Net Award Amount: \$650.00

Disbursement Plan: 01 *Split Code: 01 Custom Split

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0590	Academic	U2	650.00	650.00	650.00	0.00
02	0600	Academic		0.00	0.00	0.00	0.00

Example Disbursement Detail, ACG2

Award Disbursement Detail

Sequence: 40 Item Type: 900000000212 Net Award Amount: \$2,000.00

Disbursement Plan: 01 *Split Code: 01 Custom Split

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0590	Academic		0.00	0.00	0.00	0.00
02	0600	Academic	U3	2,000.00	2,000.00	2,000.00	0.00

Example Disbursement Detail, SMART1

Disbursement Protection

The ability to protect an ACG or SMART award after it has been disbursed is controlled on the student's ACG/SMART Eligibility record. This protection is controlled at the term level, not at the FA Item Type level. For ACG/SMART Item Types, Disbursement Protection is not an available attribute on the FA Item Type setup.

If the Disbursement Protection attribute is checked at the term level on the ACG/SMART Eligibility record, the disbursed portion of the award for that term will be protected from packaging adjustments. The system will not reduce the award below what has already been disbursed for that term.

If the Disbursement Protection attribute is unchecked at the term level on the ACG/SMART Eligibility record, the disbursed portion of the award for that term will not be protected from packaging adjustments. The system will reduce the award below what has already been disbursed for that term.

ACG/SMART Eligibility Statuses

For initial awards, the Packaging process uses the awarding option set up on the ACG/SMART Processing Options page. If the awarding option is set to *Eligible*, the system awards ACG/SMART grants that have a status of *Eligible* for the given terms. If the awarding option is set to *Eligible, pending review*, the system awards ACG/SMART grants that have a status of *Eligible* or *Eligible, pending review* for the given terms.

For existing awards, where an ACG or SMART award already exists and the system is determining continued eligibility for that award:

- The award is retained if the status is one of the following:
 - *Eligible*
 - *Eligible, Pending Review*
 - *Ineligible, Pending Review*

- *Not Verified*
- If the status is *Canceled*, the Packaging process reduces the award to \$0, regardless of Disbursement Protection.
- If the status is *Ineligible* and the award has not been disbursed for the term, the Packaging process reduces the award to \$0.
- If the status is *Ineligible* and the award has been disbursed for the term, the Packaging process checks the Disbursement Protection flag on the ACG/SMART Eligibility record. If Y, the Packaging process reduces the award to disbursed amount. If N, the Packaging process reduces the award to \$0.

Projected Awards

If there are more FA Term records than there are ACG/SMART Eligibility records for the student, the Packaging process projects award eligibility for subsequent terms that do not exist on the student’s ACG/SMART Eligibility record. The prior (non-projected) term’s Academic Level will be used to determine the maximum term amount for subsequent terms.

For example, if the student has Fall, Winter, and Spring FA Term records, but only a Fall ACG/SMART Eligibility record, the Packaging process projects an award eligibility for the student for the Winter and Spring terms. The Fall HERA Academic Level will govern the amount of the award for the subsequent terms (Winter and Spring).

If the student has Fall, Winter, and Spring FA Term records, but only Fall and Winter Eligibility records, the Packaging process projects an award eligibility for the student for the Spring term. The Winter HERA Academic Level will govern the amount of the award for the subsequent term (Spring).

Pages Used for ACG/SMART Packaging

Page Name	Object Name	Navigation	Usage
Initial Setup	ITEM_TYPE_TBL	<ul style="list-style-type: none"> • Design Student Administration, Define Student Financials, Setup I-Z, Item Types • Design Student Administration, Design Financial Aid1, F-K, Item Types • Administer Financial Aid, Package and Disburse Aid, Setup, Item Types 	Create item types for ACG1, ACG2, SMART1, and SMART2.
Aggregate Level Cross-Reference	AGGR_LVL_XREF	Design Student Administration, Design Financial Aid1, Setup A-B, Aggregate Levels Xref	Populate the new HERA Academic Level.

Page Name	Object Name	Navigation	Usage
Aggregate Aid Limit	AGGR_AID_TBL	Design Student Administration, Design Financial Aid1, Setup A-B, Aggregate Aid Limits	Create multiple unique aggregate areas for each ACG and SMART grant program by academic level.
FA Item Type 1	ITEM_TYPE_FA_1	<ul style="list-style-type: none"> • Design Student Administration, Design Financial Aid1, Setup F-K, Financial Aid Item Types, FA Item Type 1 • Administer Financial Aid, Package and Disburse Aid, Setup, Financial Aid Item Types, FA Item Type 1 	Populate the new HERA Academic Level and ACG/SMART Aggregate Area.
FA Item Type 2	ITEM_TYPE_FA_6	<ul style="list-style-type: none"> • Design Student Administration, Design Financial Aid1, Setup F-K, Financial Aid Item Types, FA Item Type 2 • Administer Financial Aid, Package and Disburse Aid, Setup, Financial Aid Item Types, FA Item Type 2 	Populate Meet/Need Cost and Award Remainder Rule.
FA Item Type 4	ITEM_TYPE_FA_4	<ul style="list-style-type: none"> • Design Student Administration, Design Financial Aid1, Setup F-K, Financial Aid Item Types, FA Item Type 4 • Administer Financial Aid, Package and Disburse Aid, Setup, Financial Aid Item Types, FA Item Type 4 	Populate specific Term Category minimum and maximum values for ACG/SMART.

Page Name	Object Name	Navigation	Usage
Application Engine Request	AE_REQUEST	PeopleTools, Application Engine, Process, Request	Request to run the SFA_ASG_AGGR routine for existing ACG/SMART awards and incoming aggregates.

Setting Up Item Types for ACG and SMART

You must set up four Item Types, one for each award type, ACG1, ACG2, SMART1, and SMART2.

Access the Initial Setup page in the Student Financials application and set up the four item types.

Adding the HERA Academic Level to the Aggregate Table

Access the Aggregate Level Cross-Reference page.

Aggregate Level	NSLDS Loan Year	Graduate Level	Academic Level	Description	Short Description		
G1	1st Year Graduate	<input checked="" type="checkbox"/>		Graduate 1st Year	Grad 1	+	-
G2	2nd Year Graduate	<input checked="" type="checkbox"/>		Graduate 2nd Year	Grad 2	+	-
G3	3rd Year Graduate	<input checked="" type="checkbox"/>		Graduate 3rd Year	Grad 3	+	-
G4	4th or more Graduate	<input checked="" type="checkbox"/>		Graduate 4th Year	Grad 4	+	-
P1	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-
P2	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-
P3	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-
P4	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-
U0	1st Year - Never Attended	<input type="checkbox"/>	1st Year - Never Attended	Undergraduate Freshman - Never	Fresh-nev	+	-
U1	1st Year - Previously Attended	<input type="checkbox"/>	1st Year - Previously Attended	Undergraduate Freshman	Freshman	+	-
U2	2nd Year	<input type="checkbox"/>	2nd Year	Undergraduate Sophomore	Sophomore	+	-
U3	3rd Year	<input type="checkbox"/>	3rd Year	Undergraduate Junior	Junior	+	-
U4	4th Year	<input type="checkbox"/>	4th Year	Undergraduate Senior	Senior	+	-
U5	5th Year+	<input type="checkbox"/>		Undergraduate Senior, 5th Year	5th Year	+	-

Aggregate Level Cross-Reference page

Use this page to populate the Aggregate Level Cross Reference Table for the new HERA Academic Level. HERA Academic Level is only available when the NSLDS Loan Year values are:

- 1st Year – Never Attended
- 1st Year – Previously Attended
- 2nd Year
- 3rd Year
- 4th Year

Academic Level	Select the corresponding HERA academic level for each aggregate level. Note that U0 and U1 require different HERA academic level values. U0: 1st Year – Never Attended U1: 1st Year – Previously Attended U2: 2 nd Year U3: 3 rd Year U4: 4 th Year
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Creating Aggregate Aid Limits

To ensure that the Packaging and Awarding processes will correctly track and maintain the unique academic level limits for the ACG and SMART programs, you must create four new aggregate areas for ACG1, ACG2, SMART1, and SMART2. You must create these four new aggregate areas for both 2007 and 2008 to accommodate transfer students.

Note. You must define four unique aggregate areas. If you previously packaged ACG/SMART awards with less than four unique aggregate areas, see the Updating Existing ACG/SMART Aggregate Area section below.

Access the Aggregate Aid Limit page.

Aggregate Aid Limit

Aggregate Area: ACG1 **Aid Year:** 2008 Federal Aid Year 2007 - 2008 Copy

First ◀ 1 of 1 ▶ Last

***Effective Date:** 01/01/1900 **Status:** Active + -

***Description:** ACG1 ***Source:** Federal

Long Description: ACG1 **Federal ID:** ACG

Aggregate Program: ***Financial Aid Type:** Grant

Pell Grant

Undergrad Lifetime: \$750 **Graduate Lifetime:** \$0 **Max Terms:**

Grad Limit Rule
 Cumulative Distinct

Level Limits				View All	First ◀	1-2 of 2 ▶	Last
*Aggregate Level		Aggregate Limit	Cumulative	Max Terms			
U0 <input type="text"/>	Undergraduate Freshman - Never	\$750 <input type="text"/>	\$750 <input type="text"/>	+ -			
U1 <input type="text"/>	Undergraduate Freshman	\$750 <input type="text"/>	\$750 <input type="text"/>	+ -			

Aggregate Aid Limit page

Federal ID	New values are <i>ACG</i> and <i>SMART</i> .
Financial Aid Type	Select <i>Grant</i> for ACG or SMART.
Undergrad Lifetime	For each aggregate area, specify the Undergrad Lifetime limit: ACG1 – 750.00

	ACG2 – 1300.00 SMART1 – 4,000.00 SMART2 – 4,000.00															
Aggregate Level	Associate the following Aggregate Levels and corresponding Aggregate Limits to each Aggregate Area: <table border="0"> <tr> <td>ACG1</td> <td>U0</td> <td>750.00</td> </tr> <tr> <td></td> <td>U1</td> <td>750.00</td> </tr> <tr> <td>ACG2</td> <td>U2</td> <td>1,300.00</td> </tr> <tr> <td>SMART1</td> <td>U3</td> <td>4,000.00</td> </tr> <tr> <td>SMART2</td> <td>U4</td> <td>4,000.00</td> </tr> </table>	ACG1	U0	750.00		U1	750.00	ACG2	U2	1,300.00	SMART1	U3	4,000.00	SMART2	U4	4,000.00
ACG1	U0	750.00														
	U1	750.00														
ACG2	U2	1,300.00														
SMART1	U3	4,000.00														
SMART2	U4	4,000.00														

Setting Up Financial Aid Item Types

You must set up a Financial Aid Item Type for ACG1, ACG2, SMART1, and SMART2. A new field is available for entering the required HERA Academic Level when the Federal ID is ACG or SMART.

Access the FA Item Type 1 page.

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

SetID: PSUNV
Item Type: 900000000220 [ACG1](#)
Aid Year: 2008 Federal Aid Year 2007 - 2008

FA Item Type Setup View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: ACG1 Short Description: ACG1

Financial Aid Type: Grant Source: Federal Federal ID: ACG

Aggregate Area: ACG1 Institution Reporting Cd: Academic Level: 1st Year

Comments:

FA Item Type 1 page

The page behavior does not change with this bundle.

Financial Aid Type	Select <i>Grant</i> .
Federal ID	New values are <i>ACG</i> and <i>SMART</i> .
Aggregate Area	Select the corresponding aggregate area you set up on the Aggregate Aid Limit page to associate it with this FA Item Type.
Academic Level	Specify the corresponding HERA Academic Level for these FA Item Types: ACG1, 1st Year

	ACG2, 2nd Year SMART1, 3rd Year SMART2, 4th Year
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Access the FA Item Type 2 page.

FA Item Type 1
FA Item Type 2
FA Item Type 3
FA Item Type 4
FA Item Type 5
FA Item Type 6

SetID: PSUNV
Item Type: 900000000220 [ACG1](#)
Aid Year: 2008 Federal Aid Year 2007 - 2008

Awarding Rules
View All First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

Fed/Inst Affected: Both Fed and Inst
Meet Need/Cost: Straight Need/Cost
Packaging Methodology: Federal Methodology
Selection Criteria:

Rounding Rules

Rounding Option: Dollar
Round Direction: Nearest
Award Remainder Rule: Last-Dllrs
Fee Remainder Rule:
 Truncate Fees

Need Based

Self Help Award

Equity Award

Lock Award

Auto Package

Package Only Once

[FA Item Type 2 page](#)

The following fields have specific requirements for ACG or SMART grants.

Meet/Need Cost	Select <i>Straight Need/Cost</i> .
Award Remainder Rule	Select <i>Last-Dllrs</i> (last dollars).

Access the FA Item Type 4 page.

FA Item Type 1
FA Item Type 2
FA Item Type 3
FA Item Type 4
FA Item Type 5
FA Item Type 6

SetID: PSUNV
Item Type: 900000000220 [ACG1](#)
Aid Year: 2008 Federal Aid Year 2007 - 2008

Award Limits by Term Category
View All First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

*Term Category	*Minimum	*Maximum		
Regular Term	1.00	375.00	+	-

[FA Item Type 4 page](#)

The following fields have specific requirements for ACG or SMART grants.

Award Limits by Term Category

Minimum	Enter a number less than the Maximum.
Maximum	<p>For semester based grants, use these maximums: ACG1: 375.00 ACG2: 650.00 SMART1: 2,000.00 SMART2: 2,000.00</p> <p>For quarter-based grants, use these maximums: ACG1: 250.00 ACG2: 433.00 SMART1: 1,333.00 SMART2: 1,333.00</p> <p>Note. In quarter-based cases where there is an extra dollar remaining to meet the maximum award, the system assigns that dollar to the last term. For example, 433, 433, 434 to total 1,300 and 1,333, 1333, 1334 to total 4,000.</p>

Updating Existing ACG/SMART Aggregate Areas

Both the Aggregate NSLDS Push and Packaging modules require four unique Aggregate Areas for ACG1, ACG2, SMART1, and SMART2. If you packaged ACG/SMART awards with less than four unique aggregate areas prior to this release, you must consider how to update those existing awards with the four unique aggregate areas. You can use the delivered SFA_ASG_AGGR dynamic aggregation conversion routine or update this manually.

If you use the SFA_ASG_AGGR routine, we recommend that you:

1. Identify your ACG/SMART population, their respective ACG and/or SMART award amounts, and the corresponding disbursed amounts for each term. You can use PS Query or other methods to capture this information.
2. If you have not already done so, follow the steps in the previous sections to create four unique aggregate areas and then update FA Item Type Aggregate Areas to reflect the corresponding ACG1, ACG2, SMART1, and SMART2.
3. In PeopleTools, create an Application Engine (AE) Request. As part of creating the AE request, select 'SFA_ASG_AGGR – FA ASG Award Aggr Conversion' for the Program Name on the Add page. On the Application Engine Request page, select Always for the Process Frequency Field, and click Run. On the Process Scheduler Request page, click the SFA_ASG_AGGR checkbox, and click OK. This routine will associate the students' existing ACG and SMART awards to the four newly created Aggregate Areas that you established in the previous step above.
4. Run PS Query again to verify the results.

If you prefer to update manually, you must follow the steps in this order:

1. Identify your ACG/SMART population, their respective ACG and/or SMART award amounts, and the corresponding disbursed amounts for each term. You can use PS Query or other methods to capture this information.
2. Cancel existing ACG/SMART awards.
3. Create four unique aggregate areas.
4. Update FA Item Type Aggregate Areas to reflect the corresponding ACG1, ACG2, SMART1, and SMART2.
5. Re-award ACG/SMART awards.

In addition, if you manually entered ACG/SMART awards into Incoming Aggregates using less than four unique Aggregate Areas for ACG1, ACG2, SMART1, and SMART2, you must perform the following steps:

1. Zero out those existing Incoming Aggregate rows that do not correspond uniquely to ACG1, ACG2, SMART1, or SMART2.
2. If you have not already done so, follow the steps in the previous sections to create four unique aggregate areas in both Aid Year 2007 and 2008.
3. For the corresponding Aid Year, manually re-enter each student's ACG/SMART awards into Incoming Aggregates using the four newly created Aggregate Areas.

Changes to Financial Aid Disbursement Processing for ACG and SMART Grants

The following modifications to the disbursement authorization process comply with the Federal regulations for disbursing ACG and SMART grant funds to students:

- The disbursement authorization process will verify for ACG and SMART grant item types that eligibility has been established in the ACG/SMART Grant Eligibility component. The current status for the same grant type and term must be *Eligible*. Any other value will result in an authorization error.
- The authorization process will verify that the academic level in the eligibility record matches the level assigned to the item type, which is a new field in the Financial Aid Item Type component. If the values do not match, the award will fail authorization.
- New item type disbursement authorization rules have been created for ACG and SMART grants. Schools are required to create item type disbursement rules for every ACG and SMART item type regardless of whether they will be using any of the new disbursement rules.

Please note that these changes only apply to awards made in the 2008 and future aid years.

This section discusses how to:

- Set up disbursement processing for ACG/SMART grants.
- Define authorization rules for ACG/SMART grants.

Pages Used to Assign Item Type Disbursement Rules

Page Name	Object Name	Navigation	Usage
Indicators	DISB_RULE_ITM1	<ul style="list-style-type: none"> Design Student Administration, Design Financial Aid1, Setup C-E, Disbursement Rules: Item Type, Indicators Administer Financial Aid, Package and Disburse Aid, Setup, Disbursement Rules: Item Type, Indicators 	Define disbursement authorization rules for a financial aid item type.
Groups/Thresholds	DISB_RULE_ITM2	<ul style="list-style-type: none"> Design Student Administration, Design Financial Aid1, Setup C-E, Disbursement Rules: Item Type, Groups/Thresholds Administer Financial Aid, Package and Disburse Aid, Setup, Disbursement Rules: Item Type, Groups/Thresholds 	Define additional restrictions necessary for disbursement of the item type.

Setting Up Disbursement Processing for ACG/SMART Grants

Access the Indicators page.

Indicators Groups/Thresholds Checklists/Tracking

Item Type: 900000000401 Federal ACG Grant 2 **Aid Year:** 2008
Academic Career: Undergraduate **Institution:** PSUNV

Indicators First 1 of 1 Last

Eff Date: 01/01/1900 **Status:** Active [Copy Setup Data](#) + -

Descr: Federal ACG Grant 2 **Short Desc:** Federal AC

<input type="checkbox"/> Review Complete	<input type="checkbox"/> Awd Career Match Term Career	<input type="checkbox"/> Post Disb Red Ctrl - Census Dt
<input checked="" type="checkbox"/> Package Complete	<input type="checkbox"/> Honor Disbursement Hold	<input type="checkbox"/> Post Disb Reduction Control
<input type="checkbox"/> Verification Complete	<input type="checkbox"/> Must Meet Satisfactory Prog	<input checked="" type="checkbox"/> ASG HERA Level Match
<input type="checkbox"/> Official Fed EFC	<input type="checkbox"/> Hold Disb Fed Overaward	<input type="checkbox"/> ASG CIP Code Match
<input type="checkbox"/> NSLDS Loan Year Match	<input type="checkbox"/> Hold Disb Inst Overaward	<input checked="" type="checkbox"/> ASG Minimum GPA
<input type="checkbox"/> Bdgt/Term Level Match	<input type="checkbox"/> Hold If Withdrawn	<input checked="" type="checkbox"/> ASG Pell Grant Awarded
<input type="checkbox"/> Hold If No Enrollment Data	<input type="checkbox"/> Match Fees	
<input type="checkbox"/> Loan Entrance Intervw Req	<input type="checkbox"/> Authorize To Fee Assessment	

Load Level Rules

<input type="checkbox"/> Bdgt/Term Load Match	Disbursement Proration Rule:	<input type="text"/>
<input checked="" type="checkbox"/> Awd/Term Load Match	Use Current Load:	<input type="text"/>

Indicators page

The following fields and options were added for ACG/SMART (ASG) processing.

ASG HERA Level Match	Select to compare the HERA level in the grant eligibility record with the beginning of term HERA level in FA Term. Authorization fails if the values do not match.
ASG CIP Code Match	Select to compare the CIP code stored in the grant eligibility record and to the student's derived CIP code from Student Records data, which is from the student's program, plan, or sub-plan and the CIP Code source setting in the ACG/SMART Processing Options page. Authorization fails if the values do not match. If the student has more than one CIP code due to having multiple active programs, plans, or sub-plans, one match will satisfy the rule.
ASG Minimum GPA	Select to verify that the current GPA meets the minimum GPA assigned for the item type ASG Minimum GPA field. For non 2 nd year ACG item types, the GPA from the current FA Term record is used. If the award is defined as a second year ACG grant, then the GPA that is checked is the current GPA for the term where the student completed their HERA level 1. Note. The rule will fail for new transfer students awarded 2 nd year ACG and first time financial aid recipients because they would not have any prior FA Term information. Use the disbursement override functionality to disburse the award.

ASG Pell Grant Awarded	Select to verify that the student has been awarded and has accepted a Pell grant for the current aid year.
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Defining Authorization Rules for ACG/SMART Grants

Access the Groups/Thresholds page.

Indicators
Groups/Thresholds
Checklists/Tracking

Item Type: 900000000401 Federal ACG Grant 2 **Aid Year:** 2008

Academic Career: Undergraduate **Institution:** PSUNV

Thresholds First ◀ 1 of 1 ▶ Last

Eff Date: 01/01/1900 **Status:** Active **Descr:** Federal ACG Grant 2 + -

Ethnic Group: <input type="text"/> Q	Res State: <input type="text"/> Q
Acad Stand Hold: <input type="text"/> Q	Country: <input type="text"/> Q
Form of Study: <input type="text"/> Q	Group: <input type="text"/> Q
Sport: <input type="text"/> Q	Acad Plan: <input type="text"/> Q
Ath Par Cd: <input type="text"/> Q	Sub-Plan: <input type="text"/> Q

FFELP Tolerance Amount: **Tolerance Amount:**

Min GPA on FA Term: <input type="text" value="0.000"/>	ASG Minimum GPA: <input type="text" value="3.000"/>
Min GPA Prior FA Term: <input type="text" value="0.000"/>	
Minimum Units: <input type="text" value="12.00"/>	Use Current Units: <input type="text"/> ▼

Groups/Thresholds page

The ASG Minimum GPA field has been added for ACG/SMART (ASG) processing. It displays the GPA used by the ASG Minimum GPA rule. This field is available for update only if the ASG Minimum GPA option is selected.

Reporting ACG and SMART Grants to COD

This section provides an overview and discusses how to:

- Originate ACG and SMART grants.
- View originated records.
- View origination actions.
- View messages for rejected origination records
- View disbursement information for originated grants.
- View disbursement action details.
- View disbursement messages.
- Generate origination files for COD.

- Resolve ACG/SMART outbound errors.
- Process response data from COD.
- Process mid-year changes and rejected records.

Understanding COD Reporting

The following steps summarize the ACG and SMART grant creation and COD reporting process.

1. Schools determine which students are eligible to receive ACG and SMART grants. Student eligibility information is stored in the ACG/SMART Eligibility pages.
2. Schools award eligible students using item types with the Federal ID values of ACG and SMART.
3. The grant origination process (FAPASORG) creates an origination record for each student. These can be viewed in the Manage ACG/Smart Grant component.
4. The Generate ACG/SMART Outbound process (ASGOUT) populates the COD staging tables using data from the grant application tables. The process validates that the required data is present and then moves the data to the staging tables. The common record XML file is created.
5. Schools assign the appropriate grant message class name and transmit the files to COD.
6. Schools receive and process acknowledgement records. The Common Origination and Disbursement Inbound process (CODIN) loads Common Records from the XML file into staging tables. The process populates the grant origination tables using data from the COD staging table.
7. If the award is modified, adjustments to originated grants are automatically triggered or can be triggered manually from the Manage ACG/Smart Grant component.

Pages Used to Process ACG and SMART Grants

Page Name	Object Name	Navigation	Usage
Originate ACG/SMART Grants	SFA_RUN_ASG_ORG	Administer Financial Aid, Process ACG/SMART Grants, Process, Originate ACG/SMART Grants	Originate ACG and SMART records.
Origination	SFS_ASG_ORIG	Administer Financial Aid, Process ACG/SMART Grants, Use, Manage ACG/SMART Grants, Origination	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 and access COD document data and COD edit messages from this page.
ACG/SMART Grants Origination Messages	SFA_ASG_ORGMSG_SEC	Click the Message link for the selected row 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, Disbursements	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 and access COD edit messages from this page.
ACG/SMART Grants Disbursement Messages	SFA_ASG_DSBMSG_SEC	Click the Message link for the selected disbursement action row on the ACG/SMART Grants Disbursement Action Detail page.	View disbursement level messages.
ACG/SMART Outbound	SFA_RUNCTL_AS_OUT	Administer Financial Aid, Process ACG/SMART Grants, Process, ACG/SMART Outbound	Use to generate outbound common origination records for transmission to COD.
COD Document	SFA_COD_DOCUMENT	Administer Financial Aid, Process ACG/SMART Grants, Inquire, Common Orig and Disb	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.

Originating ACG and SMART grants

Access the Originate ACG/SMART Grants page.

Originate ACG/SMART Grants

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

Control Information

*Institution: *Aid Year: *Reporting School Code: Student Override

Student Override List View All First 1-4 of 4 Last

ID:	<input type="text" value="FAASG002"/>	Test2,Student	<input type="button" value="+"/> <input type="button" value="-"/>
ID:	<input type="text" value="FAASG004"/>	Test4,Student	<input type="button" value="+"/> <input type="button" value="-"/>
ID:	<input type="text" value="FAASG008"/>	Test8,Student	<input type="button" value="+"/> <input type="button" value="-"/>
ID:	<input type="text" value="FAASG010"/>	Test10,Student	<input type="button" value="+"/> <input type="button" value="-"/>

[Originate ACG/SMART Grants page](#)

The FAPASORG process selects records that meet the run control criteria for students who are awarded an ACG or 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** Activate this check box to allow individual students to be selected for origination.
- ID** Available when the student override check box is activated. Enter the EmplID of the individual records to originate. The records selected must meet the criteria defined on the page.

Viewing Originated Records

Access the Origination page.

Origination
Disbursement

Test4,Student

Aid Year: 2008 Financial Aid Year 2007-2008

Item Type: 900000000401 Federal ACG Grant 2

Award ID: 758910031A08001315001

Grant Type: ACG

Update Origination [Orig Status](#)

EmplID: FAASG004

Institution: PSUNV

Career: UGRD

Reporting School Code: 001315

Origination Status: Rejected 06/17/07 11:53:38AM

COD Transmit Status: On Hold 06/17/07 11:53:38AM

MRR Status:

First 1 of 1 Last

Seq	Trans Nbr	Award Amt	Student Lvl	Enrollment Dt	Elig Reason Cd	HS Program Cd	Program CIP Cd	Citizen Ovrd
1	1	\$1300.00	2nd ye	08/30/2007	Course			

Origination page

Use this page to view and update originated grant records. After the record is transmitted, the current row in the grid cannot be updated. To insert a new row, select 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 changes to the individual disbursement amounts, modifying the award in the packaging components causes the origination process to select the record for adjustment.

Orig Status (origination status)

Click this link to access the ACG/SMART Grants Origination Action Detail page, which displays all actions that have occurred at the origination level.

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.

Cancelled. 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 if required. 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 after the COD message has been generated.

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

MRR Status (multiple reporting record status)	<p>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.</p> <p>Values are:</p> <p><i>Blocked Institution</i></p> <p><i>Blocked and Concurrent</i></p> <p><i>Blocker Institution</i></p> <p><i>Blocker/Concurrent Enrlm</i> (blocker and concurrent enrollment)</p> <p><i>Concurrent Enrollment Institution</i></p> <p><i>Disbursed Institution</i></p> <p><i>None Found</i></p> <p><i>Originated Institution</i></p> <p><i>Shared SAR ID</i> (shared student aid report ID)</p> <p><i>Unblocked Institution</i></p> <p><i>Verification W</i> (verification without documentation)</p>
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	The first day of enrollment for the award period.
Eligibility Reason Code	<p>Select the reason the student is eligible for ACG. This field can be updated only if the grant type is ACG. The values are:</p> <p><i>HS Prog.</i> Student has completed an eligible high school program accepted by the Department of Education.</p> <p><i>AP/IB.</i> Student has completed advanced placement or international baccalaureate coursework with acceptable scores.</p> <p><i>Course.</i> Student has completed the high school coursework necessary to satisfy the ACG curriculum requirements.</p>
HS Program Cd (high school program code)	This field can be updated only if the grant type is ACG. When the Eligibility Reason Code is <i>HS Prog</i> , the appropriate high school program code must be provided.
Program CIP Cd (program classification of instructional program code)	This field can be updated only if the grant type is <i>SMART</i> . For <i>SMART</i> grants, provide the eligible CIP code.

Citizenship Override

Select to report a local override of the student's citizenship status.

Viewing Origination Actions

Access the ACG/SMART Grants Origination Action Detail page.

ACG/SMART Grants Origination Action Detail			
Item Type:	900000000401	Federal ACG Grant 2	Award Amount: 1300.00
			First ◀ 1-3 of 3 ▶ Last
Seq	Origination Action	Date	User ID
1	Originated	06/05/2007 11:15AM	PS
2	Origination Transmitted	06/17/2007 11:30AM	2007-06-17T11:30:17.6376543210
3	Orig Ackn Rejected	06/17/2007 11:53AM	2007-06-17T11:30:17.6376543210 Message

[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 any error messages generated by the grant processes or received from COD.

Viewing Messages for Rejected Origination Records

Access the ACG/SMART Grants Origination Messages page.

ACG/SMART Grants Origination Messages		
Action Seq:	3	Action Code: Orig Ackn Rejected
		Date: 06/17/2007 11:53AM
		Document ID: 2007-06-17T11:30:17.6376543210
		First ◀ 1-2 of 2 ▶ Last
Seq	Origination Action Message	
1	Inconsistent Award Information Data.	
2	Student not Pell eligible	

[ACG/SMART Grants Origination Messages page.](#)

This page displays action messages received for a rejected origination record.

Viewing Disbursement Information for Originated Grants

Access the Disbursement page.

Origination
Disbursement

Lai, Jessica E

Aid Year: 2008 Financial Aid Year 2007-2008

Item Type: 900000000405 Federal SMART Grant

EmpID: FAD0125

Institution: PSUNV

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	\$2000.00	02/01/2007	Originated	06/17/2007		08/30/2007	Action Detail
02	2	\$2000.00	06/01/2008	Originated	06/17/2007		01/24/2008	Action Detail

Disbursement page

The page displays disbursement information on the Disbursement Detail tab and COD information on the COD Info tab.

Viewing Disbursement Action Details

Access the ACG/SMART Grants Disbursement Action Detail page.

ACG/SMART Grants Disbursement Action Detail

Item Type: 900000000405 Federal SMART Grant

Disb ID: 01

Disb Amt: 2000.00

Disb Seq: 1

First 1-2 of 2 Last

Seq	Disbursement Action	Date	User ID
1	Originated	06/17/2007 12:29:54PM	PS
2	Disbursement Outbound Error	06/17/2007 12:31:34PM	Message PS

ACG/SMART Grants Disbursement Action Detail page

Document ID

Click this link to view the COD staging table data.

Message

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

Viewing Disbursement Messages

Access the ACG/SMART Grants Disbursement Messages page.

ACG/SMART Grants Disbursement Messages

Action Seq: 2

Action Code: Disbursement Outbound Error

Date: 06/17/2007 12:31:34PM

Document ID:

First 1 of 1 Last

Seq	Disbursement Action Message
1	Disbursement not transmitted due to the Award not being disbursed to Student Financials for the Disb Id.

ACG/SMART Grants Disbursement Messages page.

This page displays disbursement action messages generated by the outbound process.

Generating Origination Files for COD

Access the ACG/SMART Outbound page.

ACG/SMART Outbound

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

Selection Criteria First ◀ 1 of 1 ▶ Last

*Academic Institution: PeopleSoft University **Origination**

*Aid Year: 2006-2007 **Origination and Disbursement**

*Academic Career:

*SFA Common School ID:

*Schema Version:

*File Path and Name:

ACG/SMART Outbound page

The COD ACG/SMART Outbound (ASGOUT) process is a two-step PSJob:

- The FAPASOUT process selects all originated grants that are ready for transmission. If all required data is present, the data is moved into the COD staging tables. Selected records that are not processed are documented in the message log.
- The SFA_COD_OUT process creates the common record XML file in the location and name you specify. When sending the files to COD, be sure to use the correct grant message class names for these files.

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 (student financial assistance common school identification)

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

Schema Version

Select the valid schema version.

File Path and Name

Enter the file path and file name for which the process should create the XML file.

Origination

Select to process origination outbound records.

Origination and Disbursement

Select to process disbursement outbound records and origination records.

Resolving ACG/SMART Outbound Errors

Similar to the Pell reporting process, the outbound process can fail to generate an XML record for a student if there is an award discrepancy or required fields are missing. When an originated record fails the outbound process, an error message displays in the ACG/SMART Grants Origination Action Detail page.

Resolving an award discrepancy

When the amount of the grant in the student’s package is greater than the amount originated, 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.

Resolving incomplete origination records

When a required field for the grant is missing, identify the failed originated records by reviewing the message log for the FAPASOUT process:

Process			
Instance:	613	Type:	COBOL SQL
Name:	FAPASOUT	Description:	COD ACG/SMART Outbound
Customize Find View All			
First 1-20 of 20 Last			
Severity	Log Time	Message Text	Explain
10	10:52:35AM	FAPASOUT : Begin Execution at 10.52.34.130000 on 2006-11-27	Explain
10	10:52:35AM	FAPASOOR : Begin Execution at 10.52.35.220000 on 2006-11-27	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG001, Institution=PSUNV, Aid Year=2007, Award ID=758910001A07001315001	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG002, Institution=PSUNV, Aid Year=2007, Award ID=758910011A07001315001	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG003, Institution=PSUNV, Aid Year=2007, Award ID=758910021A07001315001	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG008, Institution=PSUNV, Aid Year=2007, Award ID=758910022S07001315001	Explain
10	10:52:35AM	FAPASOOR: Total Number of Records Read 4	Explain
10	10:52:35AM	FAPASOOR: Total Number of Records Processed 0	Explain
10	10:52:35AM	FAPASOOR : End Execution at 10.52.35.350000 on 2006-11-27	Explain
10	10:52:35AM	FAPASODB : Begin Execution at 10.52.35.420000 on 2006-11-27	Explain

Message log for the FAPASOUT process

Then review each record in the Manage ACG/SMART component.

You could also identify failed 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'
    
```

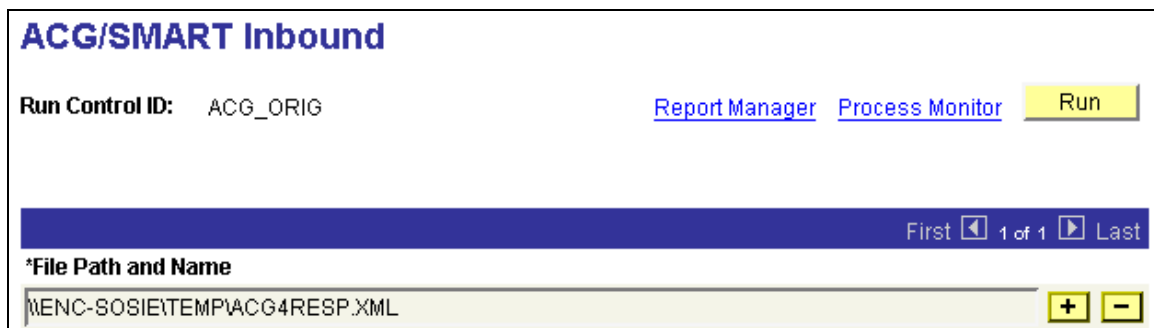
Check the following fields for missing information required for the grant type:

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

Processing Response Data from COD

Access the ACG/SMART Inbound page.



ACG/SMART Inbound page

The COD Inbound process (CODIN), the same process used for loading Pell and DL COD response files, is a two-step PSJob:

- The SFA_COD_IN process loads the XML file into the COD staging tables.

- The FAPCODIN process updates the origination record and the grant status with the response data.

Processing Mid-Year Changes and Rejected Records

When a student’s grant eligibility increases mid year because the student advanced a grade level, a separate item type for each grade level amount must be used. This is because COD will not accept more than one grade level for the same origination record. In this case, separate origination records will be reported.

Resolving origination records that have been rejected by COD

If an origination record is rejected, the processing of the acknowledgement record from COD will set the ACG/SMART Orig Status to *Rejected* and the COD Transmit Status to *On Hold*.

To resolve, first review the reasons the record was rejected and any origination or disbursement level messages received from COD. Then make changes to the student’s data to correct the problem:

- If changing 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 Transmit Status from *On-Hold* to *Ready*. When you run the ACG/SMART Outbound process, the record is re-transmitted.
- If changing the award or disbursement amounts, re-originate the record. 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 is reset. Next, update the Origination Status from *Rejected* to *Originated* and reset the Transmit Status from *On-Hold* to *Ready* and run the origination process. Run the ACG/SMART Outbound processed to generate the new file.

Origination		Disbursement						
Test8,Student		EmpID:	FAASG008					
Aid Year:	2008 Financial Aid Year 2007-2008	Institution:	PSUNV					
Item Type:	900000000405 Federal SMART Grant	Career:	UGRD					
Award ID: 758910022T08001315001		Reporting School Code:	001315					
Grant Type:	SMART	Origination Status:	Rejected 06/05/07 11:15:47AM					
<input type="checkbox"/> Update Origination	Orig Status	COD Transmit Status:	On Hold 06/05/07 11:15:47AM					
		MRR Status:						
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	\$4000.00	3rd ye	08/30/2007			01.1201	

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

Adjustment Processing

After COD has accepted a grant record, changes in eligibility may 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 (ACG eligibility reason code, HS program code, or CIP code) is required, make the change to the student’s grant eligibility record. Select the record representing the first term of the origination record 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 in which you can view the modified eligibility criteria.

Changes in the student’s academic level are not allowed after COD has accepted a grant, and so the origination process will not allow the HERA level to be changed. However, you can cancel the current origination record and re-originate the grant using a different item type for the new level.

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

Creating ACG and SMART COD Reports

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_REQS T	Administer Financial Aid, Process ACG/SMART Grants, Use, ACG/SMART Data Request	Select the types of data request files that you want to create for submission to COD.
FA EC File Inbound	RUNCTL_FA_INBOUND	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.
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 over-award payment) and Blocked Institution situation by specific batches.
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 (potential over-award payment) 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 (potential over-award payment) 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>
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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

Aid Year: 2007

Reporting School Code: 001315 UNIVERSITY OF CALIFORNIA (UCLA)

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	<input type="button" value="YTD Request ID"/>	+ -
	Multiple Report Request Code 1: Disbursed Records	<input type="button" value="Institution"/>	
	Multiple Report Request Code 2: Selected Institution	<input type="button" value="Student"/>	

Seq: 3	Request Type: ACG Multiple Reporting	<input type="button" value="YTD Request ID"/>	+ -
	Multiple Report Request Code 1: Originated Records	<input type="button" value="Institution"/>	
	Multiple Report Request Code 2: Selected Students	<input type="button" value="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: Selecting this activates the Multiple Report Request Code 1 list and the Multiple Report Requests Code 2 list.

SMART Reconciliation Request: Select to receive reconciliation information.

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

SMART 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.

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: PeopleSoft University + -

*Aid Year: 2006-2007

*Reporting School Code:

*File Type: ▼

*File Path and Name:

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

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

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

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

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

Processing Multiple Reporting Records (MRR)

Access the ACG/SMART Multiple Reporting page.

ACG/SMART Multiple Reporting

Run Control ID: 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.