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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8 SP1 Financial Aid Changes and Updates for SA Bundle #20

August 2007

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Changes and Updates for SA Bundle #20

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PeopleSoft Financial Aid Documentation Updates for SA Bundle #20

Note. This document is an update to the *PeopleSoft 8 SP1 Financial Aid PeopleBook*. It describes the Product Update ID #682697 that was posted to Customer Connection in August 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 SA Bundle # 20. Specifically, it discusses ACG/SMART award re-evaluation.

As of Aid Year 2008, you can re-evaluate ACG and SMART awards through auto packaging or mass packaging. The Campus Solutions system will re-evaluate the eligibility for each term. Based on the student's eligibility for each term, the system will adjust existing awards and/or insert new ACG/SMART awards as needed.

This bundle includes updates to:

- Re-evaluating ACG/SMART awards
- Overriding an ACG or SMART award through Professional Judgement (PJ)
- Comparing results of awards made between the Award Entry component and the Professional Judgement component
- Rerunning Aggregate Processing

See Also

For information on how to set up and process ACG/SMART awards, see *Oracle's PeopleSoft 8 SP1 Financial Aid Updates for CS Bundle #19, Regulatory Release 4 2007-2008*.

Re-evaluating ACG/SMART Awards in the 2008 Aid Year

Both auto packaging and mass packaging are enhanced to re-evaluate the student for continued ACG/SMART eligibility. An existing ACG/SMART award can be increased, decreased, or remain the same. If a student was not previously awarded an ACG/SMART award and now demonstrates eligibility, the student will be awarded the corresponding ACG/SMART award.

For the system to apply disbursement protection rules to ACG/SMART awards, an Even Split Option tied to the Disbursement Split Code Formula of the award must be established.

Given the way aggregates are structured, any U0 award made for a first-year undergraduate student will be reflected as U1. This will occur either as part of updating Incoming Aggregates or during auto packaging or mass packaging. This prevents a packaging condition where multiple aggregate levels are tied to the same award for the given award period.

Note. If you click the Validate button on the Student Aid Package page, the system will only re-evaluate the given award amount for continued eligibility, and will never increase the amount of that award.

Pages Used to Re-evaluate ACG/SMART Awards

Page Name	Object Name	Navigation	Usage
Aggregate Aid Data	STDNT_AGGR_INPUT	Administer Financial Aid, Package and Disburse Aid, Use, Incoming Aggregates	Update the student's aggregate aid information with aggregate aid awarded from a source outside your institution.
Mass Packaging Process	RUNCTL_FA_BPKG_PRC	Administer Financial Aid, Package and Disburse Aid, Process, Mass Packaging Process	Process mass packaging. Initiate the eligibility review and award calculation routine, which is the third and last step in the Mass Packaging process.
Institutional Mass Packaging Process	RUNCTL_FA_BPKG_PRC	Administer Financial Aid, Package and Disburse Aid, Process, Inst Mass Packaging Process	Process institutional mass packaging. Initiate the eligibility review and award calculation routine, which is the third and last step in the Institutional Mass Packaging process.
Student Aid Package	STDNT_AWARD_ENTRY3	Administer Financial Aid, Package and Disburse Aid, Use, Award Entry, Student Aid Package	Use auto packaging. Perform online manual awarding and Auto Packaging. Auto Packaging can be combined with online manual awarding in the same awarding session.

Overriding an ACG or SMART Award through Professional Judgement

To calculate an ACG/SMART award through Professional Judgement (PJ), an ACG/SMART eligibility record must exist where the HERA Student Level is populated. For ASG/SMART awards created through PJ, the system does not require a match between the ACG/SMART Eligibility record and the FA Term record. The award is made strictly from the HERA Student Level on the ACG/SMART Eligibility record. For Professional Judgement processing, the system does not edit for any other ACG/SMART eligibility criteria, such as FA Term Beginning of Term (BOT) level or FA Term Load.

Projecting Awards

In making awards through PJ on a projection basis, the system uses the ACG/SMART Academic Level from the prior ACG/SMART Eligibility term when distributing future term awards. For example, if the Fall term ASG Eligibility record exists, but the Spring term ASG/SMART Eligibility record does not exist, the system uses the HERA Student Level from the Fall ACG/SMART Eligibility record when determining the Spring term's award.

In another example, the Fall ACG/SMART Eligibility record does not exist, the Winter ACG/SMART Eligibility record exists, and the Spring ACG/SMART Eligibility record does not

exist. In this case, the system does not make an ACG/SMART award for the Fall term. However, it will use the Winter ACG/SMART HERA Student Level to determine eligibility for the Spring term, and distribute the PJ award across Winter and Spring Terms.

Finally, if no ACG/SMART Eligibility records exist for *any* corresponding FA Terms, PJ processing returns \$0 with an accompanying 9037 award message indicating that ACG/SMART Student Levels are missing.

Note. Even if the student's ACG/SMART Eligibility status is set to Canceled, you can make an ACG/SMART award through Professional Judgement.

Page Used to Calculate ACG/SMART Awards through Professional Judgement

Page Name	Object Name	Navigation	Usage
Professional Judgement	STDNT_AWARD_ENTRY4	Administer Financial Aid, Package and Disburse Aid, Use, Award Override, Professional Judgement	Use professional Judgement to override all ACG/SMART eligibility rules (including federal and aggregate rules) except for fiscal limits.

Comparing Results of Awards Made between the Award Entry Component and Professional Judgement Component

Packaging ACG/SMART awards using the Award Entry component invokes all of the ACG/SMART eligibility rules. As part of the eligibility rules, it requires a match between the ACG/SMART Eligibility HERA Student Level and the FA Term Beginning of Term (BOT) HERA Academic Level. If the two academic level values don't match for a given term, the system will not award an ACG/SMART award for that term.

However, if you are packaging ACG/SMART awards using the Professional Judgement component, the system does not invoke any of the ACG/SMART eligibility rules. The only edit it performs is to verify that an ACG/SMART eligibility record has a valid HERA Student Level. It does not require a match between the ACG/SMART Eligibility HERA Student Level and the FA Term BOT Academic Level.

Consequently, the Packaging results of the two components may vary. The following table illustrates the different award results between the two components.

ACG/SMART Eligibility record	FA Term record	Award Entry Component		Professional Judgement Component	
Fall ACG/ SMART Eligibility HERA Student Level equals 2	Fall FA Term HERA Academic Level – BOT level equals 2	650.00	The ACG/SMART Eligibility HERA Student Level and the FA Term HERA Academic Level – BOT level match. The system awards the student \$650 for the Fall term.	650.00	The system uses the Fall ACG/SMART Eligibility HERA Student Level of 2 to award the student \$650 for the Fall term.
Spring ACG/ SMART Eligibility HERA Student Level equals 2	Spring FA Term HERA Academic Level – BOT level equals 3	0.00	The ACG/SMART Eligibility level (2) does not match the FA Term HERA Academic Level – BOT level (3). The student is not awarded an ACG/SMART award for the Spring term.	650.00	The system uses the Spring ACG/SMART Eligibility HERA Student Level of 2 to award the student \$650 for the Spring term.

Rerunning Aggregate Processing

Changes were made to the Application Engine program SF_ASG_AGGR (PeopleTools, Application Engine, Process, Request) to recalculate the Lifetime and Yearly aggregate data after an aggregate level change. As a result, you should rerun the SF_ASG_AGGR routine with this bundle.