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Oracle's PeopleSoft 8 SP1  
Financial Aid  
Changes and Updates for SA  
Bundle #22  
Regulatory Release 2 2008-2009

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January 2008

**ORACLE®**

## Regulatory Release 2 2008-2009

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# PeopleSoft Financial Aid Documentation Changes and Updates for SA Bundle # 22

**Note.** This document is an update to the *PeopleSoft 8 SP1 Financial Aid PeopleBook*. It describes the Product Update ID # 699732 that was posted to Customer Connection in January 2008. 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 # 22.

This bundle includes updates to:

- ISIR Corrections Processing.
- NSLDS Load for 2008-2009.
- Verification Processing for 2008-2009.
- ACG/SMART Grants for Aid Year 2008-2009.
- Packaging Updates for ACG/SMART Awards.
- Pell Grant Elimination of Tuition Sensitivity Provision and Alternate Federal Pell Grant Schedules for 2007-2008.
- Pell Grant Awards for 2008-2009 Pell Schedules.
- Direct Loan COD processing for 2008-2009.
- Pell COD processing for 2008-2009.

## ISIR Corrections Processing

This section includes updates and changes to ISIR processing to support regulatory release changes for the 2008-2009 Aid Year cycle. It documents changes to ISIR pages and discusses how to process ISIR corrections.

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### Processing ISIR Corrections

You can now create 2008-2009 ISIR Correction and Signature files. In addition, updates to the ISIR load process reflect the final changes to the 2008-2009 ISIR file layout in the Electronic Data Exchange for 2008-2009 published in October 2007.

The ISIR message tables are updated with the comment codes and text for 2008-2009.

The ISIR/SAR Cross Reference table is updated with the SAR field numbers for 2008-2009.

This section discusses how to:

- View the ISIR Suspense Detail Report.

- Add your institution to a student’s ISIR.

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

## Changes to the ISIR Menus

The following navigation paths have been removed from the menu:

- Administer Financial Aid, Exchange Financial Aid Data, Use, ISIR Susp Management 06/07.
- Administer Financial Aid, Manage Need Analysis, Use2, ISIR Susp Management 06/07.
- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Inbound Summary 06/07.
- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Outbound Summary 06/07.
- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Outbound Data 06/07.

The following navigation paths have been added to the menu:

- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Outbound Summary 08/09.
- Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Outbound Data 08/09.

## Pages Used to Review and Process ISIR Data

Page Name	Object Name	Navigation	Usage
ISIR Suspense Detail Report	SFA_RUNCTL_FA927	Administer Financial Aid, Exchange Financial Aid Data, Reports, ISIR Suspense Detail	Generate a Crystal report of all suspended ISIRs for a selected Aid Year.
ISIR Add School	ISIR_ADD_SCHOOL	Administer Financial Aid, Exchange Financial Aid Data, Use, ISIR School Choice Additions	ISIR School Recipients Add your institution to a student's ISIR. Submit this request to the Center Processor to request a student's ISIR data to send to your institution's destination point.

## Viewing the ISIR Suspense Detail Report

Access the ISIR Suspense Detail Report.

### ISIR Suspense Detail Report

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

**Report Parameters**

Aid Year:   Financial Aid Year 2008-2009

Transaction Data Source/Type:   Spanish correction

### ISIR Suspense Detail Report

For aid year 2009, the run control page contains updated/new values for **Transaction Data Source Type** field. The new values are:

Value	Description
2Q	Spanish Correction
4Q	Spanish Correction
7G	FAFSA4caster EZ FAFSA renewal
7H	FAFSA caster EZ renewal Spanish
7R	FAFSA 4caster Renewal
7T	FAFSA 4caster Spanish

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## Adding Your Institution to a Student's ISIR

Access the ISIR Add School page.

**ISIR Add School**

John Suazo ID: FA0600

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**Add School Information**

User ID:	PS	Process Status:
School Cd:	<input type="text" value=""/>	Process Date:
*Institution:	PSUNV <input type="text" value=""/> PeopleSoft University	Request Date: 12/31/2007
*Aid Year:	2009 <input type="text" value=""/> Financial Aid Year 2008-2009	
DRN:	<input type="text" value="0000"/>	*Original SSN: <input type="text" value=""/>
*Trans Nbr:	<input type="text" value=""/>	*Name CD: <input type="text" value=""/>
*Sch Pos:	<input type="text" value="Rplic Sch10"/> <input type="button" value="v"/>	<input type="checkbox"/> Request ISIR from CPS

### [ISIR Add School page](#)

On the ISIR Add School page for the Aid Year 2009, the **\*Sch Pos (School Position)** field now contains four new school code positions (School Positions 7-10) that are available on the ISIR.

## NSLDS Load for 2008-2009

The NSLDS load process is modified to accept the modified NSLDS Transfer Monitoring and Financial Aid History files that will be generated by NSLDS January 2008.

The NSLDS Code table is updated with the new status code of PX (Identify Theft Discharged Loan).

This section discusses how to review and process NSLDS data.

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## Reviewing and Processing NSLDS Data

This section discusses how to:

- View details of NSLDS aggregate data.
- View details of NSLDS ACG Grant data.
- View details of NSLDS NSG Grant data

## Pages Used to Review and Process NSLDS Data

Page Name	Object Name	Navigation	Usage
NSLDS Information	NSLDS_GEN_AGGR	<p>Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS Information</p> <p>Administer Financial Aid, Apply for Financial Aid, Inquire, NSLDS Inquiry, NSLDS Information</p> <p>Administer Financial Aid, Manage Need Analysis, Inquire, NSLDS Inquiry, NSLDS Information</p> <p>Administer Financial Aid, Process Loans, Inquire, NSLDS Loan Data, NSLDS Information</p>	View error codes, change flags, MPN flags, and alert file flags.
NSLDS Detail (Formerly the NSLDS Active Match page)	NSLDS_ERR_CD_SEC	<p>Click the detail link on the NSLDS information page.</p> <p>(Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS Information)</p>	View NSLDS error codes, change flags, master promissory note flags, and alert file flags for the effective-dated row.
NSLDS ACG	NSLDS_ACG	<p>Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS ACG</p> <p>Administer Financial Aid, Apply for Financial Aid, Inquire, NSLDS Inquiry, NSLDS ACG</p> <p>Administer Financial Aid, Manage Need Analysis, Inquire, NSLDS Inquiry, NSLDS ACG</p> <p>Administer Financial Aid, Process Loans, Inquire, NSLDS Loan Data, NSLDS ACG Data, NSLDS ACG</p>	View details for Academic Competitiveness Grants.

Page Name	Object Name	Navigation	Usage
NSLDS NSG	NSLDS_NSG	Administer Financial Aid, Package and Disburse Aid, Inquire 2, NSLDS Inquiry, NSLDS NSG Administer Financial Aid, Apply for Financial Aid, Inquire, NSLDS Inquiry, NSLDS NSG Administer Financial Aid, Manage Need Analysis, Inquire, NSLDS Inquiry, NSLDS NSG Administer Financial Aid, Process Loans, Inquire, NSLDS Loan Data, NSLDS NSG	View details for National SMART Grants.

## Viewing Details of NSLDS Aggregate Data

Access the NSLDS detail page.

<b>NSLDS Activity</b>			
Additional Pell:	N	Additional Loans:	N
Additional ACG:		Additional NSG:	
NSLDS Active Match:			
<b>Change Flags</b>			
NSLDS Default Ln Chg:	N	NSLDS Overpymnt Chg:	N
NSLDS Dschrgd Ln Chg:	N	NSLDS Aggr Loan Chg:	N
NSLDS Satsfctry Rpymnt Chg:	N	NSLDS Perkins Chg:	N
NSLDS Actv Bnrkptcy Chg:	N	NSLDS Pell Pymnt Chg:	N
NSLDS Fraud Loan Chg:			
<b>Loan Limit Flags</b>			
NSLDS Grad Sub Loan Limit:			
NSLDS UG Sub Loan Limit:			
NSLDS Grad Combo Loan Limit:			
NSLDS UG Combo Loan Limit:			
<b>DL Plus Master-Prom Note Flag</b>			
DL Staff Master-Prom Note Flag:	N	No MPN on file	
DL Plus Master-Prom Note Flag:			
DL Grad Plus MPN Flg:			
<b>NSLDS Alert File Flags</b>			
Aggregate Change Flag:		Loan Change Flag:	
ACG Change Flag:		NSG Change Flag:	
Pell Change Flag:			

### [NSLDS Detail page for Aggregate Data](#)

The **Loan Limit Flags** group box has been updated.

Prior to Regulatory Release #1 for 2008-2009, the **Loan Limit Flags** group box appeared as follows:

<b>Loan Limit Flags</b>	
NSLDS Sub Limit Exceeded:	NSLDS Combo Limit Exceeded:
ISIR Sub Limit Flag:	ISIR Combo Limit Flag:

### [Loan Limit Flags group box before changes](#)

The NSLDS fields populated from the NSLDS file and the ISIR fields populated from the ISIR file were not career specific.

In Regulatory Release #1 for 2008-2009, the following changes were delivered to the **Loan Limit Flag** fields based on the EDE Technical Reference for 2008-2009:

Loan Limit Flags	
<b>NSLDS Sub Limit Exceeded:</b>	
<b>NSLDS Grad Sub Loan Limit:</b>	< <b>Modified existing field</b>
<b>NSLDS UG Sub Loan Limit:</b>	< <b>Created new field</b>
<b>NSLDS Combo Limit Exceeded:</b>	
<b>NSLDS Grad Combo Loan Limit:</b>	< <b>Modified existing field</b>
<b>NSLDS UG Combo Loan Limit:</b>	< <b>Created new field</b>

**Loan Limit Flags group after changes**

On the ISIR file, the existing fields were converted to specify *graduate (Grad)* limits and new fields were added to specify *undergraduate (UG)* limits.

The NSLDS file was still populating the **NSLDS Sub Limit Exceeded** and **NSLDS Combo Limit Exceeded** fields while the ISIR file populated the modified **NSLDS Grad Sub Loan Limit** and **NSLDS Grad Combo Loan Limit** fields and new **NSLDS UG Sub Loan Limit** and **NSLDS UG Combo Loan Limit** fields.

When the final NSLDS technical reference was published in October 2007, it specified that the existing fields were converted to specify *undergraduate* limits and new fields were added to specify *graduate* limits.

With this bundle, the following changes to the Loan Limit Flag fields are based on the changes outlined in the NSLDS technical reference.

Loan Limit Flags	
<b>NSLDS Grad Sub Loan Limit:</b>	
<b>NSLDS UG Sub Loan Limit:</b>	
<b>NSLDS Grad Combo Loan Limit:</b>	
<b>NSLDS UG Combo Loan Limit:</b>	

The **NSLDS Sub Limit Exceeded** field and the **NSLDS Combo Limit Exceeded** fields have changed.

- NSLDS Sub Limit Exceeded** Set to *hidden*. Existing data behind this field was moved to the new **NSLDS UG Sub Loan Limit** field. The new **NSLDS UG Sub Loan Limit** field now has a description field associated with it.
- NSLDS Combo Limit Exceeded** Set to *hidden*. Existing data behind this field was moved to the new **NSLDS UG Combo Loan Limit** field. The new **NSLDS UG Combo Loan Limit** now has a description field associated with it.

## Viewing Details of NSLDS ACG Grant Data

Access the NSLDS ACG page.

NSLDS Information | NSLDS Loan Detail | NSLDS Pell | **NSLDS ACG** | NSLDS NSG | NSLDS Additional Information

Edith Whitehead ID: 0042027

SSN: 492-90-0387 NSLDS DOB: Last Updated: 03/03/2003 Last Effseq: 1

**Aggregate Data** View All First 1 of 1 Last

Eff Date: 03/03/2003 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR [Detail](#)

**Academic Competitiveness Grant Information** View All First 1 of 1 Last

Sequence:	Transaction Nbr:	Last Update:
School Code:		Academic Level:
Award Amount: \$0	Paid to Date: \$0	COD Seq Code:
Eligibility Code:	Posted to COD:	ACG Change:
High School Prog:	Award ID:	Award Year:
Percent Elig Schedule Award:	Scheduled Award:	Percent Elig Acad Year:

### NSLDS ACG page

The NSLDS Load process has been updated to populate the **Percent Elig Acad Year** field on the NSLDS ACG page with the new **Total Percent Eligibility Used by Academic Year Level** field added to the NSLDS batch file layout.

## Viewing Details of NSLDS NSG Grant Data

Access the NSLDS NSG page.

NSLDS Information | NSLDS Loan Detail | NSLDS Pell | NSLDS ACG | **NSLDS NSG** | NSLDS Additional Information

Edith Whitehead ID: 0042027

SSN: 492-90-0387 NSLDS DOB: Last Updated: 03/03/2003 Last Effseq: 1

**Aggregate Data** View All First 1 of 1 Last

Eff Date: 03/03/2003 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR [Detail](#)

**National SMART Grant Information** View All First 1 of 1 Last

Sequence:	Transaction Nbr:	Last Update:
School Code:		Academic Level:
Award Amount: \$0	Paid to Date: \$0	Sequence Code:
Instructional Program Code:	Posted to COD:	NSG Change:
Award ID:		Award Year:
Percent Elig Schedule Awd:	Scheduled Award Amount:	Percent Elig Acad Year:

### NSLDS NSG page

The NSLDS Load process has been updated to populate the **Percent Elig Acad Year** field on the NSLDS NSG page with the new **Total Percent Eligibility Used by Academic Year Level** field added to the NSLDS batch file layout.

# Verification Processing for 2008-2009

Updates were made to data verification pages to reflect changes in the 2007 federal tax forms.

This section discusses how to verify tax data.

## Verifying Tax Data

This section discusses updates related to how to:

- Use Income Adjustment for tax year 2007.
- Use Tax, Credits, and Payments for tax year 2007.
- View Schedule A Itemize Deductions for tax year 2007.

## Changes to the Verification Menus

The following navigation path has been removed from the menu:

- Administer Financial Aid, Manage Need Analysis, Use, Appl Data Verification 05/06

## Pages Used for Verification

This section displays the following changed pages.

Page Name	Object Name	Navigation	Usage
Income Adjustments	SFA_INCOME_ADJ_09 SFA_INCOME_ADJ_A09	Click the Income Adjustments link on the Tax Form Data page. (Administer Financial Aid, Manage Need Analysis, Use, Appl Data Verification, Tax Form Data)	Record 1040 or 1040A adjustments to income. The tax form recorded as filed determines which fields activate. Values entered here write to Tax Form Data/Income Adjustments and may affect Worksheet A totals.
Tax Credits and Payments	SFA_TAXCREDIT_09 SFA_TAXCREDIT_A09 SFA_TAXCREDIT_EZ08	Click the Tax, Credits, and Payments link on the Tax Form Data page. (Administer Financial Aid, Manage Need Analysis, Use, Appl Data Verification, Tax Form Data)	Record 1040, 1040A, or 1040EZ tax and credit data. Field activation on this page is dependent on the tax form filed. All credits entered are subtracted from the tax amount. The net calculated amount writes to Tax Form Data — US Income Tax Paid.

Schedule A Itemize Deductions	SCHA_1_14_SEC_09	Click the Sch A (schedule A) link on the Tax and Credits page from the Tax Form Data page.  (Administer Financial Aid, Manage Need Analysis, Use, Appl Data Verification, Tax Form Data)	Record itemized deductions for 1040 form.
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## Using Income Adjustments for Tax Year 2007

Access the Income Adjustments page for form 1040.

**Income Adjustments**

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**Educator expenses:**

**Certain business expenses:**

**Health savings account:**

**Moving expenses:**

**One-half self-employment tax:**

**Keogh and Self-Empl Plans Ded:**

**SE health insurance deduction:**

**Penalty on early w/d of Saving:**

**Alimony paid:**

**Filer's IRA deduction:**

**Student loan interest:**

**Tuition and fees deduction:**

**Domestic production activities:**

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**Income Adjustments:**

### [Income Adjustments page form 1040](#)

The **Archer MSA deduction** and the **Jury duty pay given employee** fields have been removed from the Income Adjustments page. **Educator expenses** and **Tuition and fees deduction** have been added back to the Income Adjustments page.

Access the Income Adjustment page for form 1040A.

<b>Income Adjustments</b>	
<b>Educator expenses:</b>	<input type="text" value="0"/>
<b>Filer's IRA deduction:</b>	<input type="text" value="0"/>
<b>Student loan interest:</b>	<input type="text" value="0"/>
<b>Tuition and fees deduction:</b>	<input type="text" value="0"/>
<b>Income Adjustments:</b>	<input type="text" value="0"/>

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

The **Penalty on early w/d of Saving** and the **Jury duty pay given employee** fields have been removed from the Income Adjustments page. Educator expenses and Tuition and fees deduction have been added back to the Income Adjustments page.

## Using Tax, Credits, and Payments for Tax Year 2007

Access the Tax, Credits and Payments page for form 1040.

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

### [Tax, Credits and Payments page form 1040](#)

The **Foreign tax credit** and **Retirement savings credit** fields have been reordered in the Tax, Credits and Payments page.

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

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

[Tax, Credits and Payments page form 1040A](#)

The **Education Credit**, **child Tax Credit** and **Retirement savings credit** fields have been reordered in the Tax, Credits and Payments page.

## Using Schedule A Itemize Deductions for Tax Year 2007

Access the Schedule A Itemize Deductions page for form 1040.

Schedule A Itemize Deductions	
<b>Medical and Dental Expenses</b>	
Allowable Med/Dental Expense:	<input type="text" value="0"/>
<b>Taxes You Paid</b>	
State and Local Taxes:	<input type="text" value="0"/>
Real Estate Taxes:	<input type="text" value="0"/>
Personal Property Taxes:	<input type="text" value="0"/>
Other Taxes:	<input type="text" value="0"/>
Total taxes paid:	<input type="text" value="0"/>
<b>Interest You Paid</b>	
Home mortgage:	<input type="text" value="0"/>
Home mortgage (unreported):	<input type="text" value="0"/>
Points not reported to you:	<input type="text" value="0"/>
Qualified Mortgage Insurance:	<input type="text" value="0"/>
Investment interest:	<input type="text" value="0"/>
Total interest paid:	<input type="text" value="0"/>
<b>Gifts To Charity</b>	
Gifts by cash or check:	<input type="text" value="0"/>
Gifts other than cash or check:	<input type="text" value="0"/>
Carryover from prior year:	<input type="text" value="0"/>
Total gifts to charity:	<input type="text" value="0"/>
<b>Casualty and Theft Losses</b>	
Casualty or theft loss(es):	<input type="text" value="0"/>
<b>Job Expense &amp; Misc Deductions</b>	
Unreimbursed employee expense:	<input type="text" value="0"/>
Tax preparation fees:	<input type="text" value="0"/>
Other expenses:	<input type="text" value="0"/>
Total of job expenses:	<input type="text" value="0"/>
<b>Job Expense &amp; Misc Deductions:</b>	<input type="text" value="0"/>
<b>Other Miscellaneous Deductions:</b>	<input type="text" value="0"/>
<b>Total Itemized Deduction:</b>	<input type="text" value="0"/>

### [Schedule A Itemize Deductions page](#)

A new field, **Qualified Mortgage Insurance**, has been added to the Schedule A Itemized Deductions page.

## ACG/SMART Grants for Aid Year 2008-2009

All Eligibility and COD Reporting processes for ACG and SMART Grants have been updated for Aid Year 2007-2008 to reflect the regulatory changes for Aid Year 2008-2009.

# Packaging Updates for ACG/SMART Awards

This section discusses:

- ACG/SMART Using Professional Judgement (PJ).
- ACG/SMART Awards and Award Period Processing.
- NSLDS Aggregates for ACG/SMART programs.[IS1]

## ACG/SMART Using Professional Judgement (PJ)

With this bundle, you can award ACG/SMART awards to students through the Professional Judgment (PJ) page even if no ACG/SMART eligibility record exists for the given terms. Also, you do not need to specify a HERA Academic Level on the FA Term record for ACG/SMART awards. You can award multiple ACG/SMART awards to a student regardless of the student's true ACG/SMART eligibility.

The system uses the ACG/SMART HERA academic level tied to the Financial Aid Item Type setup to make an ACG/SMART award. The system considers no other ACG/SMART eligibility edits.

### Page Used to Award ACG/SMART Grants Using 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.

### Awarding ACG/SMART Grants Using Professional Judgement

Access the Professional Judgement page. Select the Award tab.

Professional Judgement **Need Summary** Term Summary

Huieron,Helena M **ID:** FAPKASG0099  
**Aid Year:** 2008 Federal Aid Year 2007 - 2008 **Institution:** PSUNV

**Career:** UENG Undergraduate Engineering **Package Status:** Applied **Validate** **Post**  
**Award Period:** Both **Packaging Plan ID:** **Retrieve** **Reset**

[Award Notification](#)

**Student Aid Package**

Award **Status**

*Nbr	Action	Career	*Item Type	Description	Offered	Accepted	*Disb Plan	*Split Code	
10	<input type="checkbox"/>	UENG	900000000224	ACG1_QTR	750.00	0.00	02	01	+
20	<input type="checkbox"/>	UENG	900000000225	ACG2_QTR	1,300.00	0.00	02	01	+
30	<input type="checkbox"/>	UENG	900000000226	SMART1_QTR	4,000.00	0.00	02	01	+
40	<input type="checkbox"/>	UENG	900000000227	SMART2_QTR	4,000.00	0.00	02	01	+

Professional Judgement page: Award tab

The four ACG/SMART awards are not subject to ACG/SMART eligibility limits.

Select the Status tab.

Professional Judgement **Need Summary** Term Summary

Huieron,Helena M **ID:** FAPKASG0099  
**Aid Year:** 2008 Federal Aid Year 2007 - 2008 **Institution:** PSUNV

**Career:** UENG Undergraduate Engineering **Package Status:** Applied **Validate** **Post**  
**Award Period:** Both **Packaging Plan ID:** **Retrieve** **Reset**

[Award Notification](#)

**Student Aid Package**

Award **Status**

*Nbr	Action	Career	*Item Type	PJ	Lock	Need Override	Override	Charge Priority	Status	
10	<input type="checkbox"/>	UENG	900000000224	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		+
20	<input type="checkbox"/>	UENG	900000000225	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		+
30	<input type="checkbox"/>	UENG	900000000226	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		+
40	<input type="checkbox"/>	UENG	900000000227	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		+

Professional Judgement page: Status tab

The four awards are marked as assigned through Professional Judgement.

**See Also**

PeopleSoft 8 SP1 Financial Aid PeopleBook, Awarding and Packaging Students, "Using Professional Judgement."

CS Bundle #19 Financial Aid 9.0, "Overview of ACG and SMART Grant Functionality."

## ACG/SMART Awards and Award Period Processing

With this bundle, you can package ACG/SMART awards for students in non-standard award (Leading or Trailing Summer) periods. ACG/SMART grants can be awarded for either a single award period (Academic or Non-Standard) or across multiple award periods (Non-Standard/Academic or Academic/Non-Standard).

You can also package ACG/SMART awards across academic and non-standard award periods in batch, manual, or automatic packaging mode. Examples in the section include manual and auto packaging for Leading Summer periods and auto packaging for a Trailing Summer term.

### Pages Used to Award ACG/SMART Grants for Non-Standard Award Periods

Page Name	Object Name	Navigation	Usage
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.
Award Disbursement Detail	STDNT_PKG_DISB_SEC	Click the Disbursement link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	View award disbursement ID detail as well as create custom split amounts and customize loan fee amounts.

### Awarding ACG/SMART Grants for Leading Summer Period (Manual)

You can use the Student Aid Package page to package ACG/SMART awards for students in non-standard award periods - Leading or Trailing Summer periods. The disbursement plans and split codes associated with the award dictates how the award will span across the award periods.

Access the Student Aid Package page.

Student Aid Package **Need Summary** Term Summary

Aularone, Llondra L **ID:** FAPKASG0106  
**Aid Year:** 2008 Federal Aid Year 2007 - 2008 **Institution:** PSUNV

**Career:** UGRD Undergraduate **Package Status:** Applied **Validate** **Post**  
**Award Period:** Both **Packaging Plan ID:** **Retrieve** **Reset**

[Award Notification](#)

**Student Aid Package**

**Award** Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
10		UGRD	900000000220	ACG1_SEM	750.00	0.00	02	02

[Disbursement](#) **+**

**Student Aid Package page: Award tab**

This example shows the ACG1 award was manually packaged across Leading Summer and Academic Award Periods using a Disbursement Plan/Split Code that spans both award periods.

**Viewing Award Disbursement Detail for Manual Example**

Access the Award Disbursement Detail page.

**AWARD DISBURSEMENT DETAIL**

**Sequence:** 10 **Item Type:** 900000000220 **Net Award Amount:** \$750.00

**Disbursement Plan:** 02 **\*Split Code:** 02  Custom Split

**Disbursement Distribution** First 1-3 of 3 Last

Disb ID	Term	Award Period	Aggr Lvl	Offered	Accepted	Net Disb Balance	Disbursed
01	0585	Non Std	U0	375.00	0.00	375.00	0.00
02	0590	Academic	U1	375.00	0.00	375.00	0.00
03	0600	Academic	U1	0.00	0.00	0.00	0.00

**Award Disbursement Detail page**

This Award Disbursement Detail page shows the award spanning across Leading Summer and Fall terms.

**Awarding ACG/SMART Grant for Leading Summer Period (Auto Package)**

This example shows the student was auto packaged initially with a Leading Summer packaging plan (Award Period = Non-Standard). The student is subsequently auto packaged with an Academic Award Period packaging plan.

Therefore, when you post the award, it results in a Custom Split for ACG1.

Student Aid Package **Need Summary** Term Summary

Buierone,Kelsey A **ID:** FAPKASG0105  
**Aid Year:** 2008 Federal Aid Year 2007 - 2008 **Institution:** PSUNV

**Career:** UGRD Undergraduate **Package Status:** Completed    
**Award Period:** Both **Packaging Plan ID:** AWDPERASGS    
[Award Notification](#)

**Student Aid Package**

Award **Status**

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
20	<input type="checkbox"/>	UGRD	900000000301	Fed Stafford Loan-Sub Add On	2,625.00	2,625.00	AS	08	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>
30	<input type="checkbox"/>	UGRD	900000000302	Fed Stafford Loan-Unsub Add On	3,400.00	3,400.00	AS	08	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>
40	<input type="checkbox"/>	UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	XX	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>
50	<input type="checkbox"/>	UGRD	900000000220	ACG1_SEM	750.00	750.00	AS	XX	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>
90	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>
100	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>
110	<input type="checkbox"/>	UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>
130	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	600.00	600.00	AS	01	<input type="checkbox"/> <a href="#">Disbursement</a> <input type="button" value="+"/>

Example of the Student Aid Package page with a custom split for the ACG1\_SEM award

## Viewing Award Disbursement Detail for Auto Packaged Leading Summer Period

**AWARD DISBURSEMENT DETAIL**

**Sequence:** 50 **Item Type:** 900000000220 **Net Award Amount:** \$750.00

**Disbursement Plan:** AS **\*Split Code:** XX  Custom Split

**Disbursement Distribution** First 1-4 of 4 Last

Disb ID	Term	Award Period	Aggr Lvl	Offered	Accepted	Net Disb Balance	Disbursed
01	0585	Non Std	U0	375.00	375.00	375.00	0.00
02	0590	Academic	U0	375.00	375.00	375.00	0.00
03	0600	Academic	U0	0.00	0.00	0.00	0.00
04	0605	Non Std	U0	0.00	0.00	0.00	0.00

### Award Disbursement Detail page

This Award Disbursement Detail page shows that the ACG1 award spans the Leading Summer and Fall terms.

## Awarding ACG/SMART Grant for Trailing Summer Period (Auto Package)

This example shows that the student was batch packaged initially with an Academic Award Period packaging plan, which resulted in the student being awarded the ACG2 award. The student was then auto packaged with a Non-Standard Trailing Summer packaging plan, which resulted in the SMART Grant being awarded for the Trailing Summer term.

Career: UGRD Undergraduate Package Status: Completed Validate Post  
 Award Period: Non Std Packaging Plan ID: TRAIL\_ASG Retrieve Reset  
[Award Notification](#)

**Student Aid Package**

Award Status

Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	
10		UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	XX	Disbursement +
30		UGRD	900000000221	ACG2_SEM	1,300.00	1,300.00	AS	01	Disbursement +
60		UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	Disbursement +
70		UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	Disbursement +
80		UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	Disbursement +
90		UGRD	900000000304	Sub Staff - Sem	3,500.00	3,500.00	AS	01	Disbursement +
100		UGRD	900000000305	Unsub Staff Sem	2,640.00	2,640.00	AS	01	Disbursement +
130		UGRD	900000000222	SMART1_SEM	2,000.00	2,000.00	AS	09	Disbursement +
150		UGRD	900000000301	Fed Stafford Loan-Sub Add On	2,000.00	2,000.00	AS	09	Disbursement +
160		UGRD	900000000302	Fed Stafford Loan-Unsub Add On	2,360.00	2,360.00	AS	09	Disbursement +

Student Aid Package page

Viewing Award Disbursement Detail for Trailing Summer Period (Auto Package)

**AWARD DISBURSEMENT DETAIL**

Sequence: 30 Item Type: 900000000221 Net Award Amount: \$1,300.00

Disbursement Plan: AS Split Code: 01  Custom Split

Disbursement Distribution First 1-4 of 4 Last

Disb ID	Term	Award Period	Aggr Lvl	Offered	Accepted	Net Disb Balance	Disbursed
01	0585	Non Std	U2	0.00	0.00	0.00	0.00
02	0590	Academic	U2	650.00	650.00	650.00	0.00
03	0600	Academic	U2	650.00	650.00	650.00	0.00
04	0605	Non Std	U2	0.00	0.00	0.00	0.00

Award Disbursement Detail page for Sequence 30

This Award Disbursement Detail page shows that the ACG2\_SEM (Sequence 30) award spans only the Academic Award Period terms.

**AWARD DISBURSEMENT DETAIL**

Sequence: 130 Item Type: 900000000222 Net Award Amount: \$2,000.00

Disbursement Plan: AS \*Split Code: 09  Custom Split

Disbursement Distribution First 1-4 of 4 Last

Disb ID	Term	Award Period	Aggr Lvl	Offered	Accepted	Net Disb Balance	Disbursed
01	0585	Non Std	U3	0.00	0.00	0.00	0.00
02	0590	Academic	U3	0.00	0.00	0.00	0.00
03	0600	Academic	U3	0.00	0.00	0.00	0.00
04	0605	Non Std	U3	2,000.00	2,000.00	2,000.00	0.00

### [Award Disbursement Detail page for Sequence 130](#)

This Award Disbursement Detail page shows that the SMART1\_SEM (Sequence 130) award spans only the Trailing Summer Non-Standard Award Period term.

## **Pell Grant Elimination of Tuition Sensitivity Provision and Alternate Federal Pell Grant Schedules for 2007-2008**

To support the College Cost Reduction and Access Act (CCRAA), the system no longer uses the tuition sensitivity provision for the Pell Grant program and the Alternate Payment and Disbursement Schedules for the 2007-2008 Aid Year. Instead, the system uses the Regular Payment and Disbursement schedules for all students when determining eligibility for a Pell Grant award for the 2007-2008 Aid Year.

## **Pell Grant Awards for 2008-2009 Pell Schedules**

As of publication of this bundle, the Department of Education (ED) has not yet published the Regular Payment and Disbursements schedules for determining Federal Pell Grant awards for the 2008-2009 Aid Year, July 1, 2008, to June 30, 2009.

However, with this release, the system allows you to calculate an estimated Pell Grant award for the 2009 aid year based on the current 2007-2008 Pell schedules. We anticipate releasing the official 2008-2009 schedules as part of the Regs 3 Bundle in April 2008.

To package students in 2009 with an estimated Pell award based on the 2007-2008 schedules, you must verify that the following areas of the 2009 setup support the 2008 amount of 4,310.00 USD:

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

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

## Direct Loan COD Processing for 2008-2009

Changes for 2008-2009 COD processing affect Direct Loan origination and adjustments, promissory notes, disbursements and loan validation. Updates to Direct Loan COD processing include:

- Rollover to the 2008-2009-aid year.
- Resolution for inconsistent identifiers on Grad PLUS awards.
- Updates to Additional Unsubsidized indicators.
- New MPN Promissory Note for PLUS awards.

This section discusses:

- Inconsistent student and borrower identifiers for Grad PLUS awards.
- Indicators for Direct Loan Unsubsidized Stafford loans.
- New PLUS MPN Promissory Note.

### See Also

For information on basic Direct Lending origination, changes, and disbursement processes, see the *PeopleSoft 8 SP1 Financial Aid PeopleBook*.

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## Inconsistent Student and Borrower Identifiers for Grad PLUS Awards

To help resolve inconsistency with Student and Borrower Identifiers for Graduate PLUS (Grad PLUS) awards, the student and borrower identifier tags will report the same data on both initial and change submissions. COD was rejecting Grad PLUS submissions when the borrower identifying block did not report that which was reported in the student identifying block. The Common Origination and Disbursement Direct Loan Outbound program will now report borrower tags that are consistent with student tags.

In the following example XML record, an initial origination for Direct Loan Subsidized Stafford and disbursement for Grad PLUS is reported.

```

<AttendedSchoolEntitID="001315">
  <Student SSN="309800621" BirthDate="1978-03-19" LastName="SILVERMAN">
    <Identifiers>
      <SSN>309800621</SSN>
    </Identifiers>
    <BirthDate>1978-03-19</BirthDate>
    <Name>
      <FirstName>JACOB</FirstName>
      <MiddleInitial>A</MiddleInitial>
      <LastName>SILVERMAN</LastName>
    </Name>
    <Contacts>
      <Address>
        <AddressTypeCode>P</AddressTypeCode>
        <AddressLine>1409 WYOMING AVE</AddressLine>
        <AddressCity>LYNN HAVEN</AddressCity>
        <AddressStateProvinceCode>FL</AddressStateProvinceCode>
        <AddressPostalCode>32444</AddressPostalCode>
      </Address>
      <PhoneNumber>8502714482</PhoneNumber>
    </Contacts>
    <CitizenshipStatusCode>1</CitizenshipStatusCode>
    <NoteMessage>FAD0194</NoteMessage>
    <DLLoanInformation LoanKey="1">
      <OriginationFeePercent>3.00</OriginationFeePercent>
      <InterestRebatePercent>1.5</InterestRebatePercent>
      <PromissoryNotePrintCode>0</PromissoryNotePrintCode>
      <DisclosureStatementPrintCode>Y</DisclosureStatementPrintCode>
      <StudentLevelCode>7</StudentLevelCode>
      <FinancialAwardBeginDate>2008-08-30</FinancialAwardBeginDate>
      <FinancialAwardEndDate>2009-05-08</FinancialAwardEndDate>
      <AcademicYearBeginDate>2008-08-11</AcademicYearBeginDate>
      <AcademicYearEndDate>2009-06-26</AcademicYearEndDate>
    </DLLoanInformation>
    <DLPLUS>
      <FinancialAwardYear>2009</FinancialAwardYear>
      <CPSTransactionNumber>03</CPSTransactionNumber>
      <FinancialAwardNumber>1</FinancialAwardNumber>
      <FinancialAwardID>309800621P09G01315001</FinancialAwardID>
      <Borrower SSN="309800621" BirthDate="1978-03-19" LastName="SILVERMAN">
        <Identifiers>
          <SSN>309800621</SSN>
        </Identifiers>
        <BirthDate>1978-03-19</BirthDate>
        <Name>
          <LastName>SILVERMAN</LastName>
        </Name>
      </Borrower>
    </DLPLUS>
  </Student>
</AttendedSchoolEntitID>
  
```

Example XML record showing a student block and a borrower block

The borrower block will report the minimum simple element tags: <SSNO>, <BirthDate> and <LastName>, if reported in the student block.

## Indicators for Direct Loan Unsubsidized Stafford Loans

Beginning with the 2008-2009 award year, COD will incorporate loan limit edits for Unsubsidized loan amounts. COD edits ensure that student’s Subsidized loans do not exceed the Base Annual Loan Limits (maximum Subsidized amount). COD will determine the highest loan limit from the student level code, the HEAL indicator, the PreProfessional indicator, Additional Unsubsidized indicator, and Dependency Status.

To support the reporting of Direct Loan Unsubsidized loans, the Direct Loan Origination process will now evaluate eligibility indicators on the Database Matches page accessed from the Packaging Status Summary page. If the criteria have been met, corresponding indicators are selected on the origination record for reporting.

This section discusses how to:

- Set student eligibility.
- Review student eligibility.

---

## Pages Used to Set and Review Student Eligibility

Page Name	Object Name	Navigation	Usage
Database Matches	ISIR_DBMATCH_SEC	Administer Financial Aid, Package and Disburse Aid, Use, Packaging Status Summary. Click on the Database Matches link.	Update supporting indicators to identify students eligible for additional unsubsidized Stafford eligibility. Applicable for only Direct Loan Unsubsidized Stafford loan types.
Application Misc Data (application miscellaneous data)	LOAN_ORIG_ELG_DL01	Administer Financial Aid, Process Loans, Use, Direct Loan App, Application Misc Data	Process and review information pertaining to student eligibility, promissory note printing, and loan credit.

## Setting Student Eligibility

Access the Database Matches page.

### Database Matches

Match Values	Override
<b>SSN Match:</b> Match	<input checked="" type="checkbox"/>
<b>SSA Citizenship Indicator:</b> U.S. Citiz	<input checked="" type="checkbox"/>
<b>DHS/INS Match:</b>	<input checked="" type="checkbox"/>
<b>Sec DHS/INS Match Flag:</b>	
<b>VA Match:</b>	<input checked="" type="checkbox"/>
<b>Selective Service Match:</b> Reg Conf	<input checked="" type="checkbox"/>
<b>Selective Service Registration:</b>	<input checked="" type="checkbox"/>
<b>NSLDS Match:</b> Eligible	<input checked="" type="checkbox"/>
<b>Prisoner Match:</b>	<input checked="" type="checkbox"/>
<b>Drug Offense Conviction:</b> Eligible	<input checked="" type="checkbox"/>
<b>Father's SSN Match:</b> Match	<input checked="" type="checkbox"/>
<b>Mother's SSN Match:</b> Match	

---

PLUS Override

HEAL Eligible

Title IV Fund Eligibility

PreProfessional Coursewrk

### Database Matches page

The following check boxes are used to set student eligibility.

#### PLUS Override

Select this check box to define dependent undergraduates who are eligible for additional Unsubsidized Stafford Loan because their parents are judged a credit risk. Selecting this check box causes the packaging process to not award a PLUS loan and enable a dependent undergraduate student to become eligible for additional Unsubsidized Stafford Loan funds. PLUS Override also displays on the aggregate aid summary components for aggregate areas that correspond to either the FFELP or Direct Loan programs.

This selects the **Additional Unsub Eligibility** indicator on the Application Misc Data page of the Manage Direct Loan

Application component. This indicator is updated on Direct Loan Application if the student is a dependent and has been awarded an Unsubsidized Stafford Direct Loan.

**HEAL Eligible**

Select this check box to identify eligibility for increased Stafford loan limits for eligible health professional candidates. Field does not directly impact the packaging process.

This selects the **HEAL Eligible** indicator on the Application Misc Data page of the Manage Direct Loan Application component. This indicator is updated on Direct Loan Application if the student’s Direct Lending Year is at least a Fourth Year and the student has been awarded an Unsubsidized Stafford Direct Loan.

**PreProfessional Coursewrk**  
(preprofessional coursework)

Select this check box to identify students eligible for additional Unsubsidized Stafford eligibility, due to participation in either undergraduate or graduate preparatory coursework.

This selects the **PreProfessional Coursework Eligible** indicator on the Application Misc Data page of the Manage Direct Loan Application component. This indicator is updated on Direct Loan Application if the student’s Direct Lending Year is at least a Fifth Year and the student has been awarded an Unsubsidized Stafford Direct Loan.

If the student is a dependent, the **Additional Unsub Eligibility** indicator on Direct Loan Application will be selected.

## Reviewing Student Eligibility

Access the Application Misc Data page.

Application Bio/Demo		Application Misc Data		Application Financial		Application Acknowledgement	
<b>ID:</b>	FAD0112	Klein,Per M	<b>Institution:</b>	PSUNV			
<b>Career:</b>	UGRD	Undergraduate	<b>Aid Year:</b>	2009			
<b>Loan Type:</b>	DUQT	DL QTR UNSUB STAFFORD	<b>Appl Seq:</b>	1	<a href="#">Loan Status Summary</a>		
<b>Student Eligibility</b>							
<b>Direct Lending Year:</b>	Fifth Year+ Undergrad			<b>Depend Stat (Fed):</b>	Dependent		
<input type="checkbox"/> <b>HEAL Eligible</b>	<input checked="" type="checkbox"/> <b>PreProfessional Coursework Eligible</b>			<input checked="" type="checkbox"/> <b>Additional Unsub Eligibility</b>			
<b>PNote Print Information</b>							
<b>Loan Destination Nbr:</b>	38	DIRECT LENDING 2004					
<b>Loan Print Option:</b>	School Prints			<b>DL Disclosure Print:</b>	LOC		
<b>Loan Orig Ack Pnote Status:</b>				<b>DL Pnote Unique ID:</b>			
				<b>DL Pnote Expire Date:</b>			
<b>Loan Credit Information</b>							
<b>Loan Credit Eligibility:</b>				<b>Loan Credit Decision Dt:</b>			
<b>Loan Credit Override:</b>	<input type="checkbox"/>			<b>Loan Endorser Amount:</b>			

[Application Misc Data page](#)

The fields in the **Student Eligibility** group box are described here.

<b>Direct Lending Year</b>	<p>Contains the direct lending grade level for this student, as defined by the <i>Direct Lending Technical Reference</i>.</p> <p>The term in the <b>Direct Lending Year</b> field in FA Term on the FA Info page is related to the first distribution used in the award for this student. That term is used to derive this Direct Lending Year value.</p>
<b>Depend Stat (Fed)</b> (dependent status, federal)	<p>Displays the federal dependency status for the student.</p> <p>As of 2008-2009, Dependency Status is required on all established Direct Loans.</p>
<b>HEAL Eligible</b>	<p>Indicates the student is eligible for a HEAL loan, as determined on the Packaging Status Summary page and is valid only on Unsubsidized loans. HEAL loans are for health profession students who meet the HEAL program requirements.</p> <p>HPPA Indicator tag will report a <i>true</i> value.</p>
<b>PreProfessional Coursework Eligible</b>	<p>Indicates if the student is eligible for additional Unsubsidized Stafford due to participation in eligible undergraduate or graduate preparatory coursework. This value is derived from the Packaging Status Summary page. Student must have a Direct Lending Year of Fifth Year and above.</p> <p>Preprofessional Coursework indicator tag will report a <i>true</i> value.</p>
<b>Additional Unsub Eligibility</b> (additional Unsubsidized eligibility)	<p>Indicates if the student is eligible for the additional Unsubsidized loan amount. This value is derived from the Plus Override check box Database Matches page accessed from the Packaging Status Summary page. A student is eligible for the additional Unsubsidized loan if the student is a dependent and the parent or guardian is denied a PLUS loan. This field is valid only on Unsubsidized loans.</p> <p>This check box is selected if the student is a dependent and the PreProfessional Coursewrk check box on the Packaging Status Summary page is checked.</p> <p>Additional Unsubsidized Eligibility indicator tag will report a <i>true</i> value.</p>

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## New PLUS MPN Promissory Note

Bulletin ID: DLB-07-20 announced the availability of a revised Federal Direct PLUS Loan Application and Master Promissory Note. The Office of Management and Budget (OMB) approved a revised Direct PLUS Loan MPN under OMB Control Number 1845-0068 with a new expiration date of 08/31/2010. This replaces the current Direct PLUS Loan MPN with an expiration date of 01/31/2006, as well as the current Direct PLUS Loan BRR.

