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Oracle's PeopleSoft 8 SP1
Financial Aid
Changes and Updates for SA
Bundle #23
Regulatory Release 3 2008-2009

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Changes and Updates for SA Bundle # 23, Regulatory Release 3 2008-2009

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PeopleSoft Financial Aid Documentation Changes and Updates for SA Bundle # 23

Note. This document is an update to the *PeopleSoft 8 SP1 Financial Aid PeopleBook*. It describes the Product Update ID # 701888 that was posted to Customer Connection in April 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 # 23. Specifically, it discusses:

- Updates to ISIR comment codes for aid year 2008-2009.
- Updates to treatment of TEACH grants.
- Notes on Mass Packaging Assign process and FED_EFC Sort field.
- Updates to Federal Pell Grant Payment and Disbursement Schedules – 2008-2009.
- Updates to FM and INAS interfaces.
- Updates to COD Year To Date financial aid reports.
- Updates to transfer credit information for ACG and SMART grant candidates.

Updates to ISIR Comment Codes for Aid Year 2008-2009

This section discusses changes to the ISIR Message Table for Aid Year 2008-2009.

Two new ISIR comment codes have been created to support the Teacher Education Assistance for College and Higher Education (TEACH) grant program. The new comment codes include:

- Comment Code **#281**
- Comment Code **#282**

A script is being delivered with this release to update the ISIR Message Tables with the two new comment codes.

Page Used to Maintain ISIR Comment Codes

Page Name	Object Name	Navigation	Usage
ISIR Comments	ISIR_COMMT_TBL	<ul style="list-style-type: none"> Administer Financial Aid, Apply for Financial Aid, Setup, ISIRMessage Tables, ISIR Comments Design Student Administration, Design Financial Aid1, Setup F-K, ISIR Message Tables, ISIR Comments 	Review delivered ISIR comment codes and set severity levels. This page links the comment codes with the long description or text defined by the Department of Education.

Maintaining ISIR Comment Codes

Access the ISIR Comments page.

The screenshot shows the 'ISIR Comments' page with the following data:

*Code	Description	Severity Level	DB Match Use
278	Your father was issued a Federal Student Aid PIN to sign your 2008-2009 FAFSA. We were unable to verify his name, date of birth,	0 Ignore	<input type="checkbox"/>
279	Your mother was issued a Federal Student Aid PIN to sign your 2008-2009 FAFSA. Her information has been verified and her PIN	0 Ignore	<input type="checkbox"/>
280	Your mother was issued a Federal Student Aid PIN to sign your 2008-2009 FAFSA. We were unable to verify her name, date of birth,	0 Ignore	<input type="checkbox"/>
281	When you completed your FAFSA, you responded 'YES' to the question about your plans to take coursework that will enable you to	0 Ignore	<input type="checkbox"/>
282	There is a new federal student aid program for students who plan on becoming teachers. If you are interested, you should go to	0 Ignore	<input type="checkbox"/>

ISIR Comments page

For Aid Year 2008-2009, the texts for the new comment codes include:

- 281** When you completed your FAFSA, you responded 'YES' to the question about your plans to take coursework that will enable you to become a teacher. We asked this question because there is a new federal student aid program for students who plan on becoming teachers. You should go to www.teachgrant.ed.gov to learn more and find out what steps you must take to be considered for the program. If you cannot access the website, you should call 1-800-4-FED-AID (1-800-433-3243).

282

There is a new federal student aid program for students who plan on becoming teachers. If you are interested, you should go to www.teachgrant.ed.gov to learn more and find out what steps you must take to be considered for the program. If you cannot access the website, you should call 1-800-4FEDAID (1-800-433-3243).

Updates to Treatment of TEACH Grants

A new federal program, **TEACH**, has been added to the **Federal ID** field.

The packaging routine applies only the basic federal eligibility edits to item types associated with this Federal ID. There are no additional packaging edits or processing logic applied to TEACH item. You are solely responsible for determining which students are eligible to receive TEACH grants and the maximum amount to be awarded under this grant. We recommend that you control the awarding of the TEACH grant by establishing a TEACH aggregate, TEACH equations, and defining the Meet Need/Cost attribute of the TEACH item type as a Special Need/Cost.

Notes to Mass Packaging Assign Process and FED_EFC Sort Field

For the Mass Packaging Assign process, you should not use the Sort Field **FED_EFC** with packaging plans designated with the Non-Standard award period.

This is because FED_EFC represents the PRIMARY_EFC, which is the 9-month EFC. This is synonymous with the Academic award period. Therefore, all Non-Standard Award Period FED_EFC values will be 0.00.

If you sort by FED_EFC for any Non-Standard plan, because all of your students will have a Non-Standard FED_EFC value of 0.00, the system will default the Sort Order to EMPLID.

Updates to Federal Pell Grant Payment and Disbursement Schedules – 2008-2009

On January 10, 2008, the Department of Education released the official 2008-2009 Federal Pell Grant Program Payment and Disbursement Schedules. This document contains information to support the Pell related changes.

To package a Federal Pell Grant for students in 2009, verify that the following areas of the 2009 setup support the 2008-2009 amount of 4,731.00 USD:

1. Aggregate aid limit table (aggregate limit).
2. Item type table (maximum transaction amount).
3. Financial aid item type table (term category maximum).
4. Packaging plans that include the Pell item type (item type rule maximum).

Note. Because many Pell awards result in odd dollar amounts for the 2008-2009 Aid Year, Oracle strongly recommends that you double-check the rounding rules associated with your Pell Grant item types on FA Item Type setup page.

This section discusses how to define Financial Aid type rounding rules.

Page Used to Define Financial Aid Item Type Rounding Rules

Page Name	Object Name	Navigation	Usage
FA Item Type 2	ITEM_TYPE_FA_6	<ul style="list-style-type: none"> • Design Student Administration, Define Student Financials, Setup A-H, Financial Aid Item Types, FA Item Type 2 • 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 	Define rounding rules. Enter rounding and remainder rules for the financial aid item type.

Defining Financial Aid Item Type Rounding Rules

Access the FA Item Type 2 page.

The screenshot displays the 'FA Item Type 2' configuration page. At the top, there are tabs for 'FA Item Type 1' through 'FA Item Type 6', with 'FA Item Type 2' selected. Below the tabs, the following information is shown:

- SetID:** PSUNV
- Item Type:** 9000000000370 [Federal Pell Grant - Quarter](#)
- Aid Year:** 2009 Federal Aid Year 2008 - 2009

The 'Awarding Rules' section includes a navigation bar with 'View All', 'First', '1 of 1', and 'Last'. Below this, the 'Effective Date' is 01/01/1900 and the 'Status' is Active. The 'Rounding Rules' section is highlighted with a red box and contains the following settings:

- Rounding Option:** Dollar
- Round Direction:** Nearest
- Award Remainder Rule:** 1st-Dllrs
- Fee Remainder Rule:** (empty dropdown)
- Truncate Fees

At the bottom, there are several checkboxes for awarding rules:

- Need Based
- Equity Award
- Auto Package
- Disbursement Protection
- Self Help Award
- Lock Award
- Package Only Once

FA Item Type 2 page

After you complete the appropriate setup specified, the system will use the 2008-2009 Federal Pell Grant Program Payment and Disbursement Schedules to award students up to a maximum of 4,731.00 USD based on eligibility.

Updates to FM and INAS Interfaces

The interface changes for FM include:

- Updates to the INAS interface to calculate FM (Federal Methodology) in addition to IM (Institutional Methodology) INAS to support 2008-2009 computation tables.
- Updates to INAS Simulation fields for students.
- Updates to INAS Simulation field for parents.
- Updates to INAS Local Policy Option calculation choices.

This fix documentation discusses how to:

- Work with INAS simulation for student income assets.
- Work with INAS simulation for student information.
- Work with INAS simulation for parent income/assets.
- Define INAS calculation options.

Pages with FM INAS Critical Changes

Page Name	Object Name	Navigation	Usage
Student Income/Assets	INAS_SIM_STU1_06	Administer Financial Aid, Manage Need Analysis, Use2, INAS Simulation 08/09, Student Income/Assets	View and update fields from ISIR Corrections.
Student Information	INAS_SIM_STU2_08	Administer Financial Aid, Manage Need Analysis, Use2, INAS Simulation 08/09, Student Information	View and update fields from ISIR Corrections.
Parent Income/Assets	INAS_SIM_PAR1_06	Administer Financial Aid, Manage Need Analysis, Use2, INAS Simulation 08/09, Parent Income/Assets	View and update fields from ISIR Corrections.

<p>Global and Federal Options</p>	<p>INAS_LCL_PLCY1_05</p>	<ul style="list-style-type: none"> • Administer Financial Aid, Apply for Financial Aid, Setup, INAS Local Policy Opts 08/09, Global and Federal Options • Design Student Administration, Design Financial Aid1, Setup F-K, INAS Local Policy Opts 08/09, Global and Federal Options • Administer Financial Aid, Exchange Financial Aid Data, Setup, INAS Local Policy Opts 08/09, Global and Federal Options • Administer Financial Aid, Manage Need Analysis, Setup, INAS Local Policy Opts 08/09, Global and Federal Options 	<p>Invoke INAS changes by invoking calculation options.</p>
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Working with INAS Simulation for Student Income Assets

Access the Student Income/Assets page.

Student Income/Assets		Student Information	Parent Income/Assets	Parent Information	Overrides
Song, Joon		ID: FA0601			
Aid Year:	2009	Financial Aid Year 2008-2009		Institution:	PSUNV
Get Federal Data		Federal Extension		Formula Type:	2 Full w/out
INAS		Need Summary		Primary EFC:	11,080
Use Simulated Data		Monthly EFC		Prorated EFC:	11,080
Married:	No	AGI:	19,560	Cash:	1,200
Marital Status:	Sng/Div/Wd	U. S. Tax Paid:	3,655	Inv Net Worth:	40,000
Marital Status Date:		Student's Earnings:	18,000	Bus Net Worth:	0
Legal Res State:	SC	Spouse's Earnings:	0	Worksheet A:	100
Legal Res Date:		Res Prior 2003:	Yes	Worksheet B:	0
In Family:	01	File Return?:	Filed/Comp	Worksheet C:	20
In College:	1	Tax Form:	1040		
Exemptions:	01	Elig 1040A/EZ?:	No		
		Male or Female:	Male		

Student Income/Assets page

Changed fields and new fields are described here.

Res Prior 2002 This field has been updated to **Res Prior 2003** field.

Are You Male? This field has been updated to **Male or Female** field.

Working with INAS Simulation for Student Information

Access the Student Information page.

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides
Song,Joon		ID:	FA0601	
Aid Year:	2009	Financial Aid Year 2008-2009	Institution:	PSUNV
Get Federal Data	Federal Extension	Formula Type:	2 Full w/out	
INAS	Need Summary	Primary EFC:	11,080	
Use Simulated Data	Monthly EFC	Prorated EFC:	11,080	
Dependency Status: Independent w/Primary EFC				
VA Ben Nbr of Months:	<input type="text" value="00"/>	Born Prior 1985:	<input type="text" value="1"/> <input type="checkbox"/>	Yes
VA Ben Monthly Amt:	<input type="text" value="0"/>	Veteran:	<input type="text" value="2"/> <input type="checkbox"/>	No
Grade Level:	<input type="text" value="Grad/Prof+"/>	On Active Duty:	<input type="text" value="2"/> <input type="checkbox"/>	No
Dependents:	<input type="text" value="2"/> <input type="checkbox"/> No	Graduate Student:	<input type="text" value="1"/> <input type="checkbox"/>	Yes
Orphan:	<input type="text" value="2"/> <input type="checkbox"/> No	Selective Service?:	<input type="checkbox"/>	
Children:	<input type="checkbox"/>	1st Degree:	<input type="text" value="1"/> <input type="checkbox"/>	Yes
		Enroll Status:	<input type="text" value="1"/> <input type="checkbox"/>	Full Time
		Work or Loan:	<input type="text" value="2"/> <input type="checkbox"/>	Stud Loans

Student Information page

The **Born Prior 1984** field has been changed to **Born Prior 1985**.

Working with INAS Simulation for Parent Income/Assets

Access the Parent Income/Assets page.

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides
Song,Joon		ID:	FA0601	
Aid Year:	2009	Financial Aid Year 2008-2009	Institution:	PSUNV
Get Federal Data	Federal Extension	Formula Type:	2 Full w/out	
INAS	Need Summary	Primary EFC:	11,080	
Use Simulated Data	Monthly EFC	Prorated EFC:	11,080	
Marital Status:	<input type="text" value="Mar/ReMar"/>	AGI:	<input type="text" value="31,500"/>	Cash:
Marital Status Date:	<input type="text"/>	U. S. Tax Paid:	<input type="text" value="2,500"/>	Inv Net Worth:
Legal Res State:	<input type="text" value="SC"/>	Father's Earnings:	<input type="text" value="11,000"/>	Bus Net Worth:
Legal Res Date:	<input type="text"/>	Mother's Earnings:	<input type="text" value="17,000"/>	Worksheet A:
In Family:	<input type="text" value="03"/>	Res Prior 2003:	<input type="text" value="Yes"/>	Worksheet B:
In College:	<input type="text" value="1"/>	Tax Form:	<input type="text"/>	Worksheet C:
Exemptions:	<input type="text" value="03"/>	Tax Return Filed?:	<input type="text"/>	Father Birth Date:
		Elig 1040A/EZ?:	<input type="text"/>	<input type="text" value="01/01/1958"/>
				Mother Birth Date:
				<input type="text" value="01/01/1960"/>

Parent Income/Assets page

The **Res Prior 2002** field has been changed to the **Res Prior 2003** field.

Defining INAS Calculation Options

Access the Global and Federal Options page.

Global and Federal Options page

Use this page to calculate INAS for ISIR records or Profile records.

Global

INAS Data Source

Select:

- *Both F/I* to calculate INAS for either Profile or ISIR records.
- *Federal* to calculate INAS for ISIR records only.
- *Institutional* to calculate INAS for Profile records only.

INAS Calc Type

Select:

- *FM* to calculate INAS for ISIR records only.
- *FM & IM* to calculate INAS for either Profile or ISIR records.
- *IM* to calculate INAS for Profile records only.

Updates to COD Year To Date Financial Aid Reports

This section discusses changes to COD Year To Date financial aid reports for Pell and ACG/SMART grants.

COD does not support Financial Aid reports that query for an action code of E (Error). Valid COD action codes are:

- A - Accepted
- C - Corrected
- D - Duplicate
- R - Rejected

Consequently, the following reports have been removed from navigation and are no longer supported:

- Pell Year to Date Originations Errors
- Pell Year To Date Disbursement Errors
- ACG/SMART Year to Date Origination Errors
- ACG/SMART Year To Date Disbursement Errors

Pages Used to Produce Pell and ACG/SMART COD Reports

Page Name	Object Name	Navigation	Usage
YTD Originations Errors	RUN_CNTL_PG3_RPT	Administer Financial Aid, Process Pell Payment, Reports, YTD Originations Errors	Review information from COD and your application tables.
YTD Disbursement Errors	RUN_CNTL_0PG3_RPT	Administer Financial Aid, Process Pell Payment, Reports, YTD Disbursement Errors	Review information from COD and your application tables.
YTD Origination Errors	SFA_ASG_872_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART YTD Orig Errors	Review information from COD and your application tables.
YTD Disbursement Errors	SFA_ASG_874_RPT	Administer Financial Aid, Process ACG/SMART Grants, Reports, ACG/SMART YTD Disb Errors	Review information from COD and your application tables.

Updates to Transfer Credit Information for ACG and SMART Grant Candidates

This section discusses how to:

- Review articulated transfer coursework.

- Review articulated transfer test credits.

The final regulations for the ACG and SMART grant programs require schools to determine HERA academic level progression using the exact accounting method or one of the acceptable alternative methods, beginning Aid Year 2009.

Modifications to the FA Term process to perform this calculation are currently under development and will be delivered in a future bundle.

In the current bundle, changes have been made to the Transfer Credit Evaluation module to support the new HERA academic level calculations. The final regulations for ACG and SMART require that a *Weeks of Instruction* value be calculated from a student's acceptable transfer work.

The updated transfer credit process allows you to:

- Identify and select the articulated transfer courses, test credits, or other credits to be used in the *Weeks of Instruction* calculation.
- Summarize and store the selected transfer work information into new fields, which the FA Term process will use to determine the student's HERA level.

After the transfer credit changes delivered in the bundle have been installed, you must review and update the existing articulated transfer work to ensure that the Financial Aid Office can calculate an accurate HERA academic level. The following tasks must be performed prior to the delivery of the new HERA level calculation changes.

Note. Since these tasks require the use of the transfer credit evaluation module, collaboration with the Student Records staff is required.

First, review the results of the changes to the completed transfer credit evaluations. Verify that the articulated transfer courses, test credits, and other credits have been properly updated to indicate whether the transfer work will be used to calculate a *Transfer Weeks Of Instruction* value.

When performing the first task, consider the following points:

- By default, all transfer coursework will be set with the **Include in FA WI Stats** checkbox selected.
- By default, no transfer test credit test scores will have the **Include in FA WI Stats** checkbox selected. This is because test credits are not usually included in the *Transfer Weeks Of Instruction* calculation.
- By default, no transfer other credit sources will have the **Include in FA WI Stats** checkbox selected. Other credits refer to work and life experience credits. Currently, these credits cannot be included in the *Transfer Weeks Of Instruction* calculation.
- You may wish to restrict your review to the transfer work of your known and potential ACG and SMART recipients. You do not need to perform this review for your graduate students.

Second, run the transfer credit calculation process to populate the new **Include in Financial Aid Weeks of Instruction Stats** fields. The FA Term process will use the data in these fields to calculate the *Transfer Weeks Of Instruction* value.

Third, if necessary, repeat the same steps for the two other transfer credit sources: test credits (component Test Credits – Manual) or other credits (component Other Credits – Manual). It is unlikely that you will need to update any transfer work captured in these areas that are not expected to be included in the *Transfer Weeks Of Instruction* calculation.

Finally, create procedures with the student records staff for performing new transfer credit evaluations.

It is important to note that if these steps are not performed, the system will consider the *Transfer Weeks Of Instruction* value as 0. This may cause a lower HERA level to be calculated. Also, schools who may choose to use a HERA level calculation method that does not require a *Weeks of Instruction* calculation (i.e. grade level method) will still need to review and update their transfer work using the above steps.

Reviewing Previously Articulated Transfer Coursework

This section discusses how to review previously articulated transfer coursework.

Pages Used to Review Previously Articulated Transfer Coursework

Page Name	Object Name	Navigation	Usage
Transfer Course Entry	TRNS_CRSE_ENTRY	Manage Student Records, Process Transfer Credit, Use, Course Credits - Manual, Transfer Course Entry	Set up course transfer credit models and articulate transfer credit manually as you set up models rather than by using predefined equivalency rules. This page is essentially the same as the Transfer Course Details page of the Course Credits component with the few exceptions that are described in this section.
Equivalent Course Information	TRNS_CRSE_INT_SEC	Click the Details link on the Transfer Course Details page to edit equivalent course information.	View incoming course credit information for a specific row of a course transfer credit model, and view and edit equivalent course information.

Page Name	Object Name	Navigation	Usage
Course Credits By Term	TRNS_CRSE_TERM	<ul style="list-style-type: none"> • Manage Student Records, Process Transfer Credit, Use, Course Credits, Transfer Summary • Manage Student Records, Process Transfer Credit, Use, Course Credits - Manual, Course Credits by Term 	<p>Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of the model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit. This is the same page as the Transfer Summary page of the course credits component.</p>

Reviewing Completed Transfer Course Credit Evaluation

Access the Transfer Course Entry page.

Transfer Course Entry		Course Credits by Term	
Student Test1		ID: FAASG001	
Transfer Credit Model		View All First 1 of 1 Last	
Academic Career:	UGRD Undergraduate	<input type="button" value="+"/> <input type="button" value="-"/>	
Academic Institution:	PSUNV PeopleSoft University		
*Model Nbr:	1		
*Transcript Level:	Unofficial		
Target Information			
*Academic Program:	FAU Fine Arts Undergraduate	<input type="checkbox"/> Include in GPA	
Academic Plan:	UNDECL-UG Undeclared Undergraduate		
Source Information			
*Credit Source Type:	Manual		
Source Institution:	Pierce College		
School Type:	NA Not Applicable		
Transfer Credit Term		View All First 1 of 1 Last	
*Articulation Term:	0590 2007 Fall	Posted	<input type="button" value="+"/> <input type="button" value="-"/>
Incoming Course		Equivalent Course	
*Group *Seq#	Year: 2007 Ext Term: FALL	Course ID:	001005 MATH
1 1	Subject: MATH	Offer Nbr:	1 111
Status:	Course Nbr: 1	Units Transferred:	3.000
Posted	Description: Math 1	Grading Scheme:	UGD Undergrad
Details	Units Taken: 3.00	Grading Basis:	GRD Graded
Comments	Grade Input: A	Official Grade:	T Transfer

Example of a completed transfer course credit evaluation page

This page shows by term all coursework accepted by the school.

You must review each accepted course and verify the courses to be used in the *Transfer Weeks Of Instruction* calculation. Note that some of the fields on the page are grayed. This indicates that the transfer credit evaluation for these fields is complete.

Note that transfer coursework can be stored in more than one model and more than one term in the page. All courses must be reviewed.

Reviewing Equivalent Course Information

Access the Equivalent Course Information page.

Equivalent Course Information

Incoming Course

Term Year:

Subject: Course Nbr:

Description:

Units Taken: Grade Input: Crse Level:

Equivalent Course

Course ID: Calculus I

Offer Nbr: MATH 111

Units Transferred: Valid Attempt

Grading Scheme: Undergraduate Grading Scheme **Grd Pt/Unt:** 3.000

Grading Basis: Graded Earn Credit

Official Grade: Transfer Include in GPA

Repeat Code:

Designation:

Include in FA WI Stats

Units Att: Yes

Equivalent Course Information page

Include in FA WI Stats check box

By default, the **Include in FA WI Stats** check box is selected for all courses within the **Equivalent Course** group box. Identify the courses that are not eligible and deselect the **Include in FA WI Stats** check box for such courses.

Reviewing Course Credit by Term

Access the Course Credits By Term page.

Transfer Course Entry
Course Credits by Term

Student Test1 ID: FAASG001

Transfer Credit Model
View All
First ◀ 1 of 1 ▶ Last

Academic Career:	UGRD	Undergraduate	+ -
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	FAU	Fine Arts Undergraduate	
Admit Type/Term:			

View All
First ◀ 1 of 1 ▶ Last

Articulation Term:	2007 Fall	Posted Date:	03/27/2008	+ -
Model Status:	Posted	User ID:	Carroll,Bruce	

Calculate
Post
Unpost

Units Taken:	3.00	
Units Transferred:	3.000	

▼ **Include in FA WI Stats**

Units Taken:	0.00
Units Transferred:	0.000

Course Credits Summary

Units Taken:	3.00
Units Transferred:	3.000

Course Credits by Term page

Calculate Click to calculate the data within the **Include in FA WI Stats** region for each term.

Note. The FA Term process will use this information to calculate the HERA level.

Viewing the Course Credits Data After Calculation

Access the Course Credits By Term page.

Transfer Course Entry
Course Credits by Term

Student Test1 ID: FAASG001

Transfer Credit Model
View All First 1 of 1 Last

Academic Career:	UGRD	Undergraduate	+ -
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	FAU	Fine Arts Undergraduate	

Admit Type/Term:

View All First 1 of 1 Last

Articulation Term:	2007 Fall	Posted Date:	03/27/2008	+ -
Model Status:	Posted	User ID:	Carroll,Bruce	

Calculate
Post
Unpost

Units Taken:	3.00
Units Transferred:	3.000

▼ **Include in FA WI Stats**

Units Taken:	3.00
Units Transferred:	3.000

Course Credits Summary

Units Taken:	3.00
Units Transferred:	3.000

Course Credits by Term page after calculation

This page shows that the **Include in FA WI Stats** data is now calculated.

Note. You must repeat the calculation process for all models and terms where transfer coursework exists.

Reviewing Articulated Transfer Test Credits

This section discusses how to review articulated transfer test credits.

Pages Used to Review Articulated Transfer Test Credits

Page Name	Object Name	Navigation	Usage
Test Credit Entry	TRNS_TEST_ENTRY	Manage Student Records, Process Transfer Credit, Use, Test Credits - Manual, Test Credit Entry	Set up test transfer credit models and articulate transfer credit by creating test transfer models manually rather than by using predefined equivalency rules. This page is essentially the same as the Test Credit Details page of the Test Credits component, with a few exceptions that are described in this section.
Test Credit by Term	TRNS_TEST_TERM	<ul style="list-style-type: none"> • Manage Student Records, Process Transfer Credit, Use, Test Credits, Test Credit by Term • Manage Student Records, Process Transfer Credit, Use, Test Credits -Manual, Test Credit by Term 	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of a transfer credit model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit.
Equivalent Course Information	TRNS_TEST_EDIT_SEC	Click the Edit Equivalent Course button on the Test Credit Entry page.	Add incoming test credit information and internal equivalent course information for a specific row of a test transfer credit model for which you are manually defining equivalencies.

Reviewing Test Credit Entry Details

Access the Test Credit Entry page.

Test Credit Entry
Test Credit by Term

Julius Welch
ID: FAASG022

View All
First
1 of 1
Last

Academic Career: UGRD Undergraduate + -

Academic Institution: PSUNV PeopleSoft University

***Model Nbr:**

***Transcript Level:** v

Target Information

***Academic Program:** Liberal Arts Undergraduate Include in GPA

Academic Plan: Biology (BS)

View All
First
1 of 1
Last

***Articulation Term:** Q 2006 Fall Posted + -

*Group	*Seq#	Transfer Status	Test ID	Test Component	Equivalent Subject / Catlg Nbr	
<input type="text" value="1"/>	<input type="text" value="1"/>	Posted	AP	MAB	MATH 111	

[Add Comments](#)

Test Credit Entry page

You can evaluate the transfer test credits on this page.

Note that transfer test credit can be stored in more than one model and more than one term in the page. All test credit must be reviewed.

Reviewing Equivalent Course Information

Access the Equivalent Course Information page.

Test Credit Input			
Test ID:	<input type="text" value="AP"/>	Adv Plcmnt	
Component:	<input type="text" value="MAB"/>	Mathematics: Calculus AB	
Data Source:	<input type="text" value="ACT"/>	Test Score:	<input type="text" value="4.00"/>
Test Date:	<input type="text" value="10/08/2006"/>	Percentile:	<input type="text"/>
Equivalent Course			
Course ID:	<input type="text" value="001005"/>	Calculus I	
Offer Nbr:	<input type="text" value="1"/>	MATH 111	
Units Transferred:	<input type="text" value="3.000"/>		<input checked="" type="checkbox"/> Valid Attempt
Grading Scheme:	<input type="text" value="UGD"/>	Undergraduate Grading Scheme	<input checked="" type="checkbox"/> Earn Credit
Grading Basis:	<input type="text" value="GRD"/>	Graded	<input type="checkbox"/> Include in GPA
Official Grade:	<input type="text" value="T"/>	Transfer	Grd Pt/Unt: 3.000
Repeat Code:	<input type="text"/>		Units Att: Yes
Designation:	<input type="text"/>		
	<input type="checkbox"/> Include in FA WI Stats		

[Equivalent Course Information page](#)

Include in FA WI Stats check box Select this check box if you want the system to use the test credits when calculating the *Transfer Weeks Of Instruction* value.

Reviewing Test Credit By Term

Access the Test Credit by Term page.

Test Credit Entry		Test Credit by Term	
Julius Welch		ID: FAASG022	
		View All First 1 of 1 Last	
Academic Career:	UGRD	Undergraduate	+ -
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	LAU	Liberal Arts Undergraduate	
Admit Term:			
		View All First 1 of 1 Last	
Articulation Term:	2006 Fall	Posted Date:	05/08/2007
Model Status:	Posted	User:	Carroll,Bruce
		Calculate	Post Unpost
Units Transferred:	3.000		
▼ Include in FA WI Stats			
Units Transferred:	0.000		
Test Credits Summary			
Units Transferred:	3.000		

Test Credit by Term page

Calculate Click to populate the **FA Weeks of Instruction Stats** fields.

Repeat the calculation process for all models and terms where transfer test credits were updated.