

Disbursing in Batch-051408

1.	The first step is to process authorizations. Navigate: Financial Aid > Disbursement > Process Award Authorizations.
2.	As usual for processes, you need to select or create a Run Control ID . If you already have a Run Control ID to use, click the Search button and select it from the list. Otherwise, click the Add a New Value tab and create a new Run Control ID.
3.	Make sure the correct Institution and Aid Year are entered. Note that you can have multiple rows of parameters - use the Add a New Row button to add more rows.
4.	You can have multiple rows of parameters for this process. Only those rows with the Active checkbox selected will be processed. Click the Active checkbox to select it.
5.	If the Update Switch checkbox is selected, the process will update the database. To run the process in test mode (no database changes), clear the Update Switch checkbox. The Select Awards in Offered Stat check box is available when the Update Switch check box is cleared. Select to have the authorization process review only awards in Offered status. This option is only available when performing a test run, so that you do not inadvertently authorize and disburse offered awards.
6.	If you want to limit the processing to certain terms of the aid year, you can check the Process Selected Term checkbox and then enter the desired term or terms below.
7.	If you only want to process certain item types, check the Process Selected Items checkbox and list the Item Type numbers in the "Select Item Types" area.
8.	To run the process, click Run .
9.	Click OK .
10.	Click the Process Monitor link.
11.	Click Refresh from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> .
12.	An excellent report is available to view the results of the batch authorization process. In the left-hand menu, click Authorization Failure Report .
13.	This report requires a Run Control ID. Either use an existing one or create a new one.
14.	Enter parameters for the report. The only required fields are Academic Institution and Aid Year . You can specify a single Term , a Financial Aid Type and/or Source , or a specific Item Type for the report. If you leave any of these fields blank, the report will include all values of the blank fields.
15.	Click Run .
16.	Click OK .
17.	Click the Process Monitor link.
18.	Click Refresh from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> .

19.	Click the Details link.
20.	Click View Log/Trace.
21.	The report is a PDF file. Click it to view the report in a new window.
22.	The second step is to process disbursements for the authorized awards. Navigate: Financial Aid > Disbursement > Process Disbursements.
23.	Either create a new Run Control ID or use an existing one.
24.	Notice that this page is almost identical to the parameter page for the batch authorization process. You can have multiple parameter rows. Only those rows with the Active checkbox selected will be processed. Click the Active checkbox to select it.
25.	Select the Honor Disbursement Date checkbox to have the disbursement process compare the disbursement date on the Disbursement ID page against the current date for all selected financial aid item types. The process disburses only those awards that have a disbursement date earlier than or equal to the current date. Use the Grace Period (Days) field to allow disbursement dates within a specified number of days to be disbursed as well.
26.	As for the authorization process you can choose to process only selected terms in the aid year and/or selected item types.
27.	Click Run .
28.	Click OK .
29.	Click the Process Monitor link.
30.	Click Refresh from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> .
31.	End of Procedure.