

Version	1.0
Document Generation Date	11/6/2008
Date Modified	11/6/2008
Last Changed by	ASDS
Status	Draft

Update FA Term with ISIR Enrollment

Concept

When FA Term is built before the financial aid census date for a term, the FA Load and other fields will be set based on data from one of several sources. These fields affect budget calculations. For some institutions, it may be desirable to have FA Term reflect the load the student has indicated on the ISIR.

This process rebuilds FA Term for selected students based on the enrollment indicated on the latest ISIR. The process selects the override checkboxes and updates the values for FA Load, Units Taken and Units Passed. It recalculates Course Load Percent based on the new FA Load and sets the Budget Assign flag to *Yes Assign*. The Override Expiration Date, a parameter for the process, is entered on the FA Term page.

The effect of this process is to lock the overridden fields until the user defined expiration date. Since those fields affect budget calculations, the process effectively locks budgets until the override expires or another manual override is performed.

Note several things about this process:

1. The process will not update FA Term records for a student whose Aid Processing Status in the Packaging Status Summary page is *Packaging Complete* and for whom a Packaging Plan ID already exists.
2. If the student is selected for the process and his/her FA Term FA Load is the same as the load indicated on the ISIR, this process WILL still update his/her FA Term record. Doing so effectively locks in that FA Load until the expiration date.
3. This process will only run on a student once. If an expiration date already exists before this process runs it will skip that student.

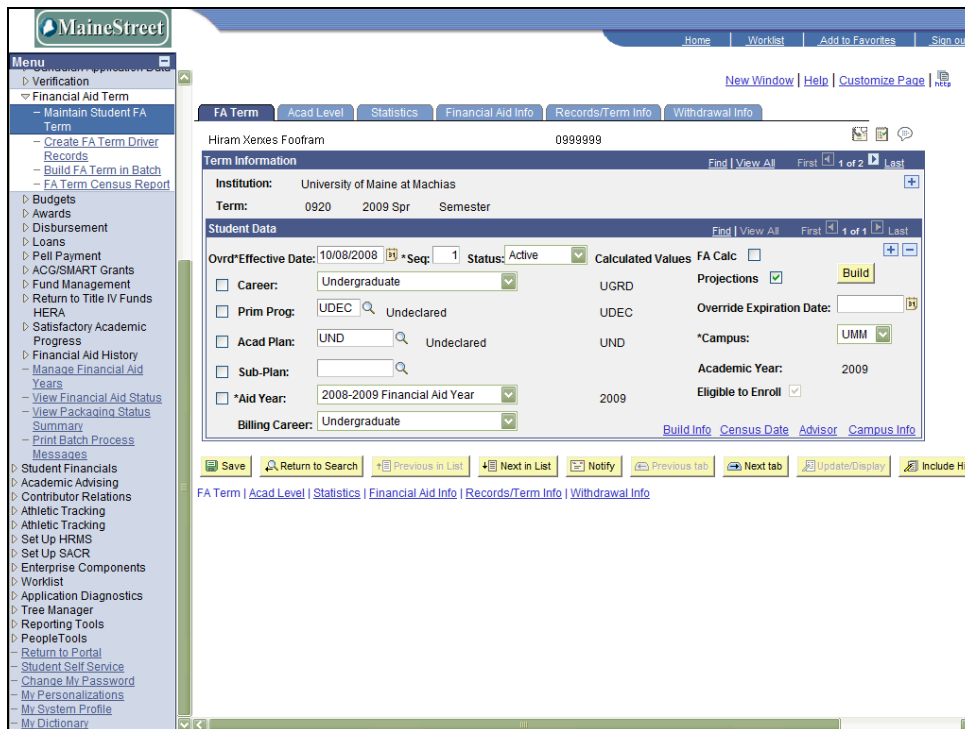
Process Document


Financial Aid: Update FA Term with ISIR Enrollment-092508

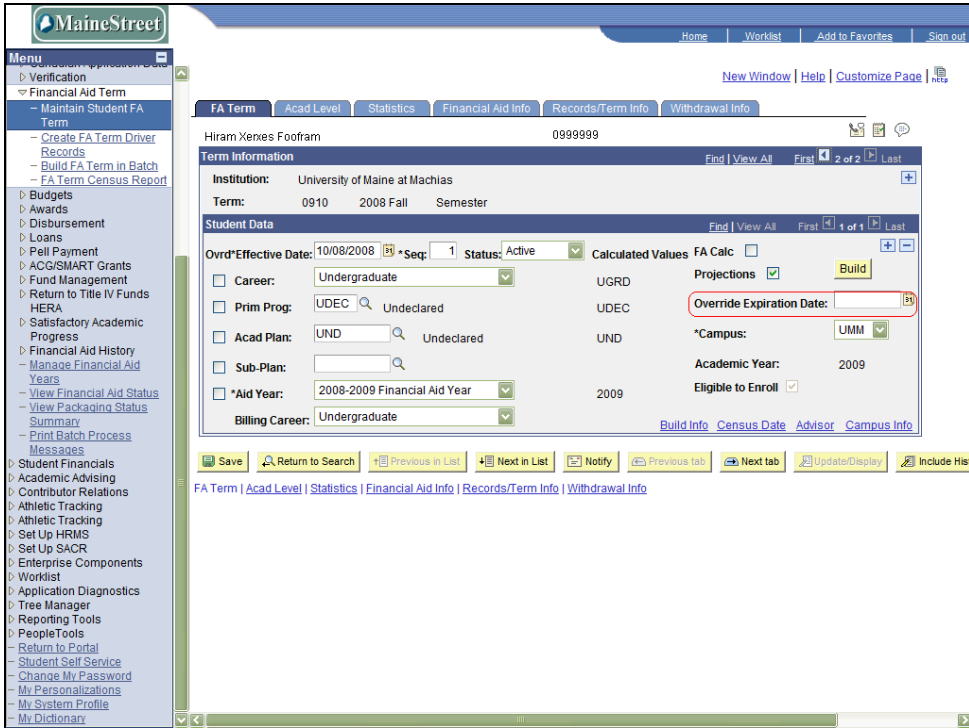


Procedure

Step	Action
1.	We will look at before and after views of a student's FA Term to demonstrate the effect of this process. Navigate to a student's FA Term: Financial Aid > Financial Aid Term > Maintain Student FA Term.



Step	Action
2.	Click the Show next row button to view fall semester. 

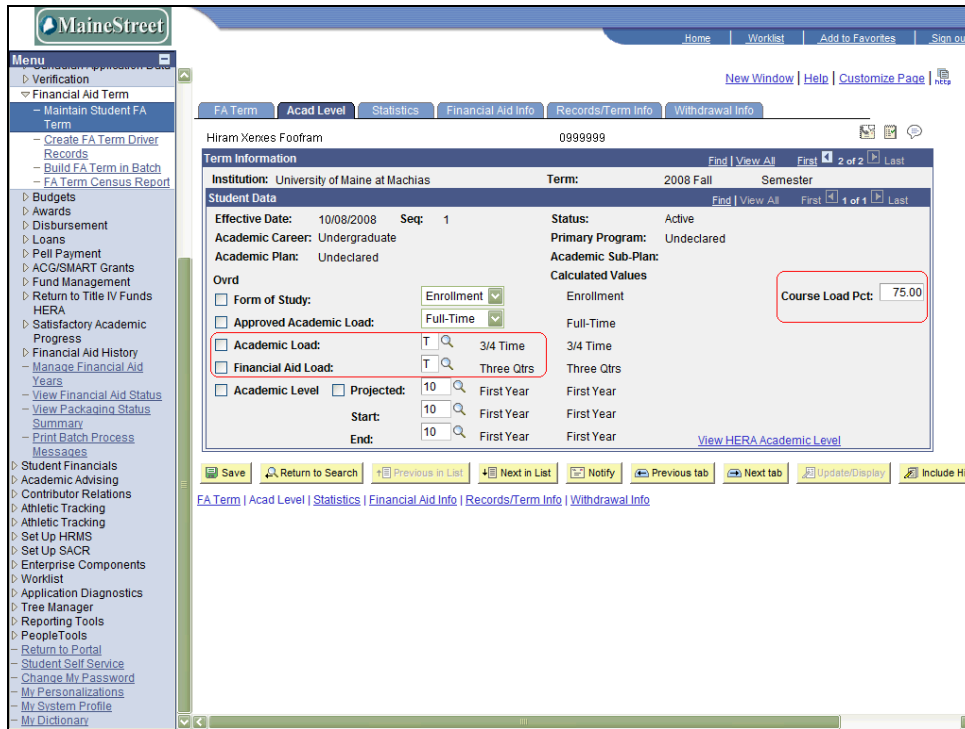


The screenshot shows the 'Acad Level' tab in the MaineStreet system. The 'Override Expiration Date' field is highlighted with a red box and is currently blank. Other fields include Career (Undergraduate), Prim Prog (UDEC), Acad Plan (UND), and Aid Year (2008-2009 Financial Aid Year). The 'Override Expiration Date' field is currently blank.

Step	Action
3.	The Override Expiration Date field is blank. Click the Acad Level tab. Acad Level

Process Document

Financial Aid: Update FA Term with ISIR Enrollment-092508



The screenshot shows the 'Statistics' tab in the MaineStreet system. The student's name is Hiram Xenos Foofram (ID: 0999999). The institution is University of Maine at Machias, and the term is 2008 Fall Semester. The student's academic career is Undergraduate, and their primary program is Undeclared. The 'Academic Load' and 'Financial Aid Load' are both set to '3/4 Time'. The 'Course Load Pct' is set to '75.00'. The 'Enrollment' dropdown is set to 'Enrollment', and 'Full-Time' is selected. The 'Academic Level' is set to '10' (First Year). The 'Start' and 'End' dates are both '10' (First Year).

Step	Action
4.	<p>The student in this example has Academic and Financial Aid Load 3/4 Time. The Course Load Percent is 75.0</p> <p>Click the Statistics tab.</p> <p>Statistics</p>

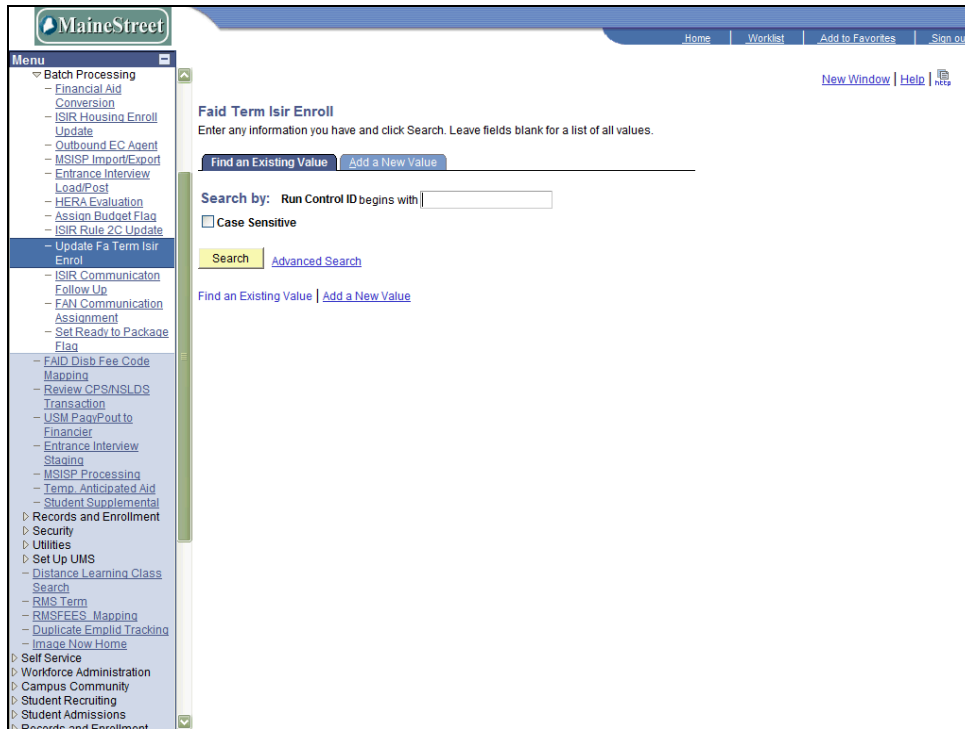


The screenshot shows the 'Financial Aid Info' tab in the MaineStreet system. The student's name is Hiram Xenex Footram (ID: 0999999) at the University of Maine at Machias, for the 2008 Fall Semester. The 'Term Information' section shows the institution, term, and semester. The 'Student Data' section includes effective date (10/08/2008), sequence (1), status (Active), academic career (Undergraduate), and primary program (Undeclared). A table shows GPA, units taken (10.000), units passed (0.000), and cumulative GPA (2.670). The 'Session Detail' section shows 'In Progress' units (10.000) and 'Completed' units (10.000). The 'Residency' section shows 1.000 units and 3.000 cumulative units.

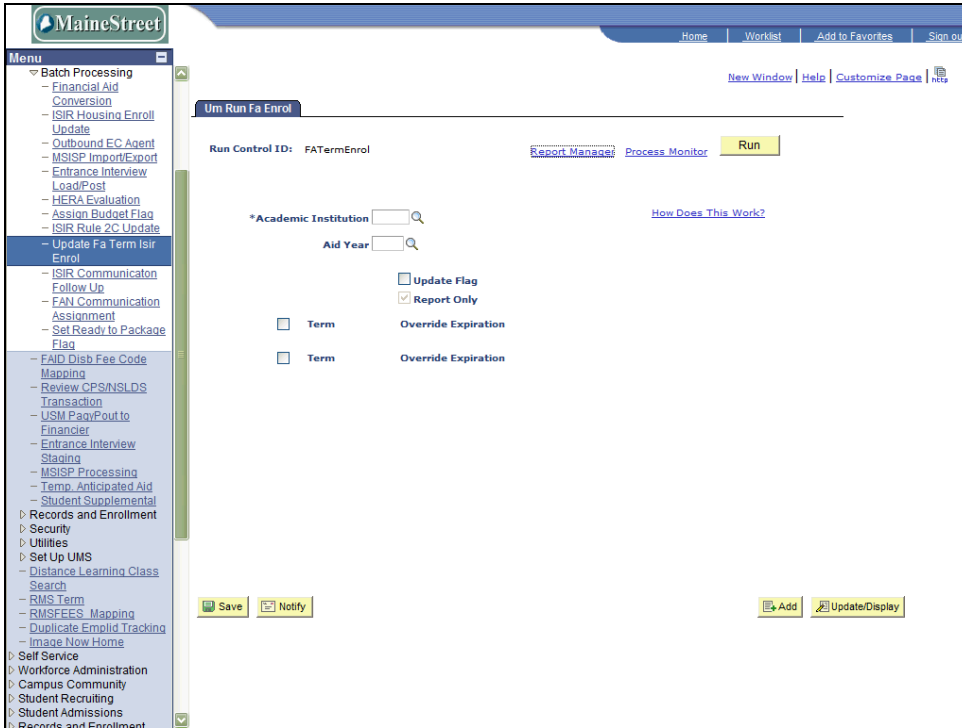
Step	Action
5.	<p>In this example, the Units Taken field is set to 10. The Units Passed value is 0.</p> <p>On the Financial Aid Info tab the Budget Assign flag may be set to <i>Yes Assign</i> or to <i>No Assign</i>. The FA Term ISIR Enroll process will always set this flag to <i>Yes Assign</i> to ensure that the student is budgeted using the updated FA Load/Course Load Percentage.</p> <p>Now run the FA Term ISIR Enroll process.</p>
6.	<p>Navigate: University of Maine Systems > Financial Aid > Batch Processing > Update FA Term ISIR Enrol.</p>

Process Document

Financial Aid: Update FA Term with ISIR Enrollment-092508



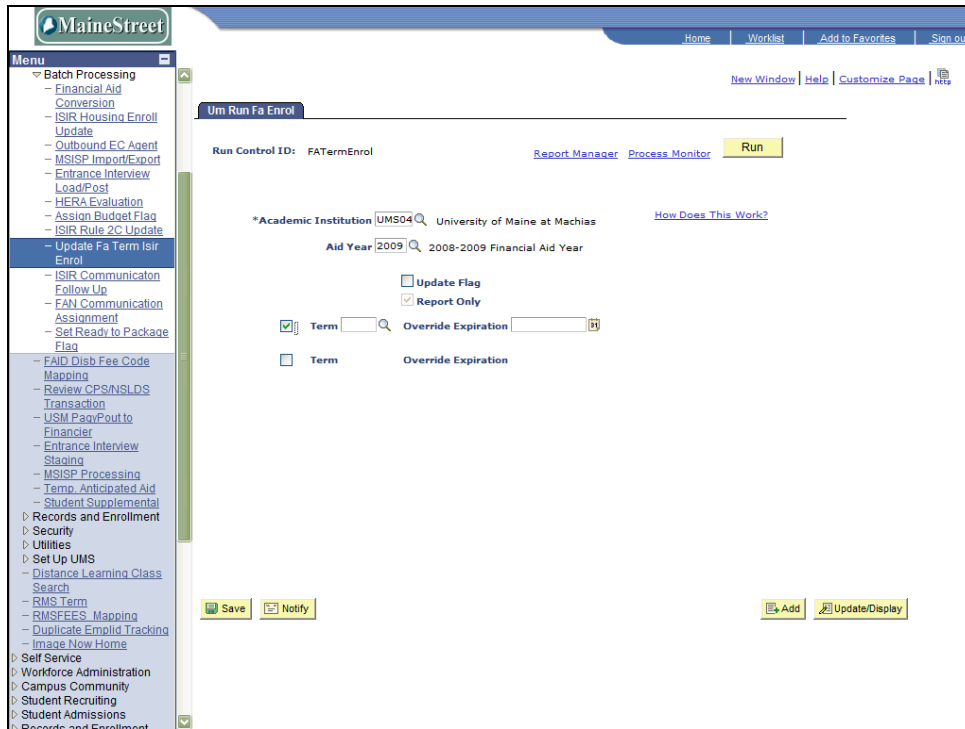
Step	Action
7.	This process requires a Run Control ID . Either select an existing one or create a new one by clicking the Add a New Value tab, entering a name and clicking the Add button.




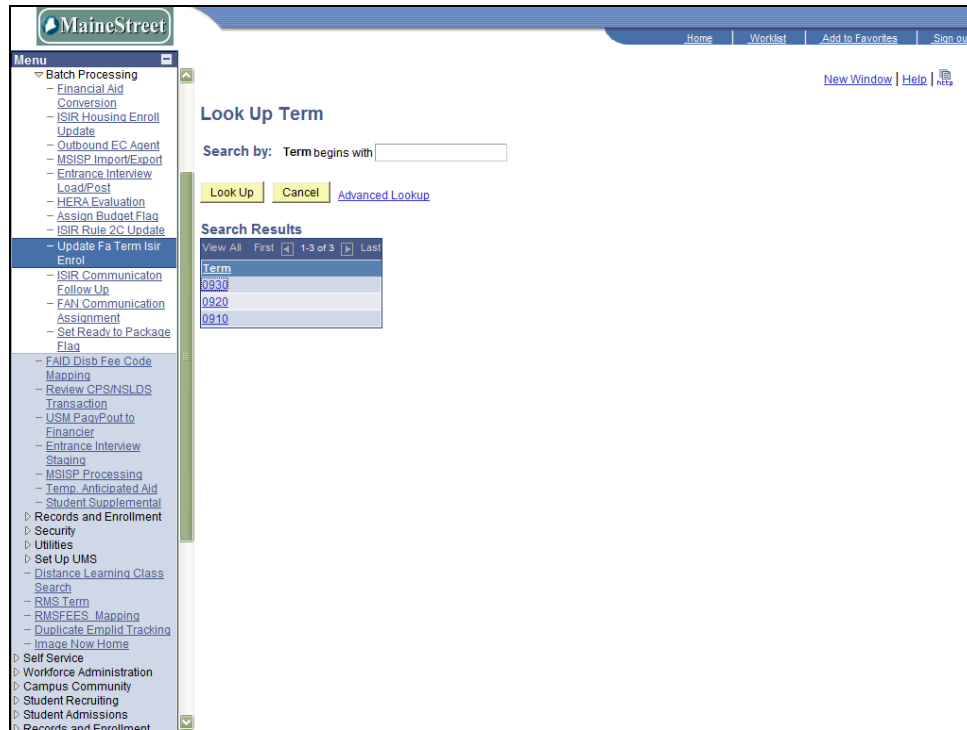
Step	Action
8.	<p>Enter your Institution and the Aid Year.</p> <p>This process will always generate a report. If you leave the Update Flag checkbox blank, the process will ONLY generate the report and won't update any students' FA Term data.</p> <p>To make the changes to FA Term, select the Update Flag option.</p>
9.	<p>Specify the Term(s) to process and the Override Expiration dates for the terms. Click the first Term checkbox.</p> <p><input type="checkbox"/></p>

Process Document

Financial Aid: Update FA Term with ISIR Enrollment-092508



Step	Action
10.	Selecting the Term checkbox creates a Term and an Override Expiration field. Click the Look up Term button. 

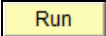
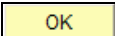



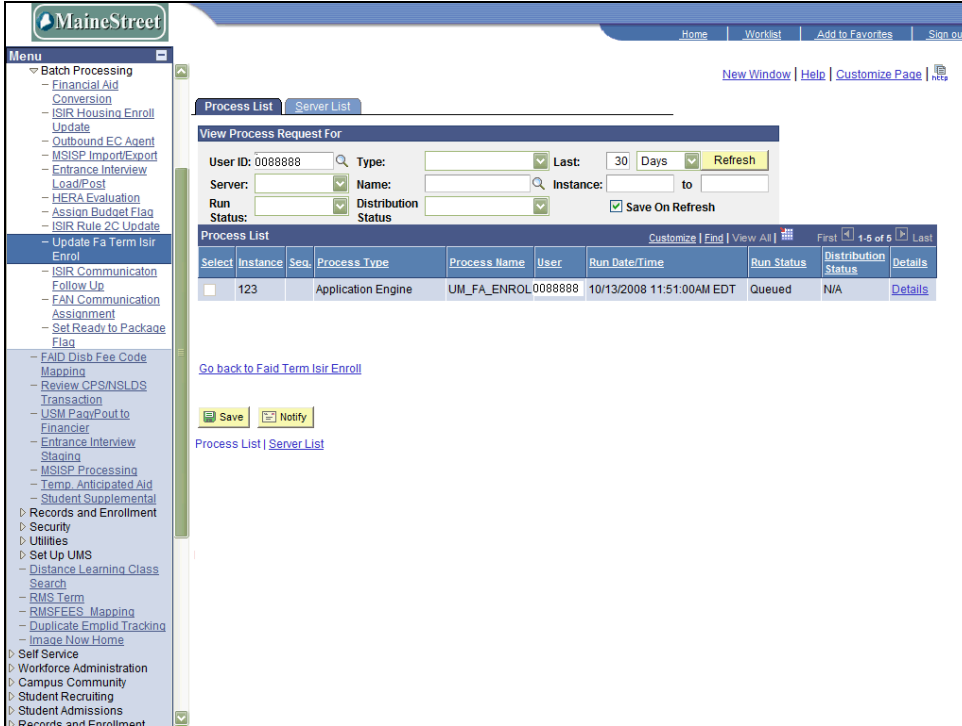
Step	Action
11.	Select a term from the list. 0910
12.	Enter an Override Expiration date or use the calendar icon to select a date.

Process Document



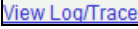
Financial Aid: Update FA Term with ISIR Enrollment-092508



Step	Action
13.	<p>If you want to process a second term, repeat the process of selecting the Term checkbox and filling in the Term and Override Expiration fields.</p> <p>Click the Run button.</p> 
14.	<p>Click the OK button.</p> 
15.	<p>Click the Process Monitor link.</p> 



The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with categories like 'Batch Processing', 'Update Fa Term Isir Enrol', and 'Records and Enrollment'. The main content area is titled 'Process List' and 'Server List'. It features a 'View Process Request For' form with fields for 'User ID: 0088888', 'Type', 'Last: 30 Days', 'Server', 'Name', 'Instance', and 'Run Status'. A 'Refresh' button is visible. Below the form is a table with columns: 'Select', 'Instance', 'Seq', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. The table contains one row with Instance 123, Process Type 'Application Engine', Process Name 'UM_FA_ENROL0088888', User '0088888', Run Date/Time '10/13/2008 11:51:00AM EDT', Run Status 'Queued', and Distribution Status 'N/A'. There are also 'Save' and 'Notify' buttons and a 'Go back to Faid Term Isir Enrol' link.

Step	Action
16.	Click the Refresh button from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> . 
17.	Click the Details link. 
18.	Click the View Log/Trace link. 

Process Document

Financial Aid: Update FA Term with ISIR Enrollment-092508



MaineStreet

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

Menu

- Batch Processing
 - Financial Aid
 - Conversion
 - ISIR Housing Enroll Update
 - Outbound EC Agent
 - MSISP Import/Export
 - Entrance Interview Load/Post
 - HERA Evaluation
 - Assign Budget Flag
 - ISIR Rule 2C Update
 - Update Fa Term Isir Enrol
 - ISIR Communication Follow Up
 - FAN Communication Assignment
 - Set Ready to Package Flag
 - FAID Disb Fee Code Mapping
 - Review CPS/NSLDS Transaction
 - USM Pay/Pout to Financier
 - Entrance Interview Staging
 - MSISP Processing
 - Temp Anticipated Aid
 - Student Supplemental
- Records and Enrollment
- Security
- Utilities
- Set Up UMS
 - Distance Learning Class Search
 - RMS Term
 - RMSFEES Mapping
 - Duplicate Emp/Id Tracking
 - Image Now Home
- Self Service
- Workforce Administration
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment

View Log/Trace

Report

Report ID: 120 Process Instance: 123 [Message Log](#)

Name: UM_FA_ENROL Process Type: Application Engine

Run Status: Success

UM_FA_ENROL

Distribution Details

Distribution Node: DEV Expiration Date: 10/23/2008

File List

Name	File Size (bytes)	Datetime Created
Redirected Terminal Output	595	10/13/2008 11:51:42.000000AM EDT

Distribute To

Distribution ID Type	Distribution ID
User	0088888

[Return](#)

Step	Action
19.	Click Redirected Terminal Output . Redirected Terminal Output

```


PeopleTools 8.46.17 - Application Engine Server
Copyright (c) 1988-2008 PeopleSoft, Inc.
All Rights Reserved

PSAESRV started service request at 14.42.20 2008-10-15

Run Mode:      Update & Report
Institution:    UMS04
Aid Year:      2009
First Term:    0910 First Override Date: 2008-10-31
Second Term:  0920 Second Override Date: 2009-01-15

Emplid   Term   FA Load Before  FA Load After  ISIR Enrollment Status  Override Exp Date  Name
-----
0999999  0910   T               F               1                       2008-10-31        HIRAM FOOFRAM
0999999  0920   F               F               1                       2009-01-15        HIRAM FOOFRAM
0890000  0910   F               F               1                       2008-10-31        HYPATIA FOOFRAM
0890000  0920   F               F               1                       2009-01-15        HYPATIA FOOFRAM

Total Students Processed : 4
Application Engine program UM_FA_ENROL ended normally
PSAESRV completed service request at 14.42.20 2008-10-15
  
```



Step	Action
20.	The report lists the students whose FA Term has been updated.

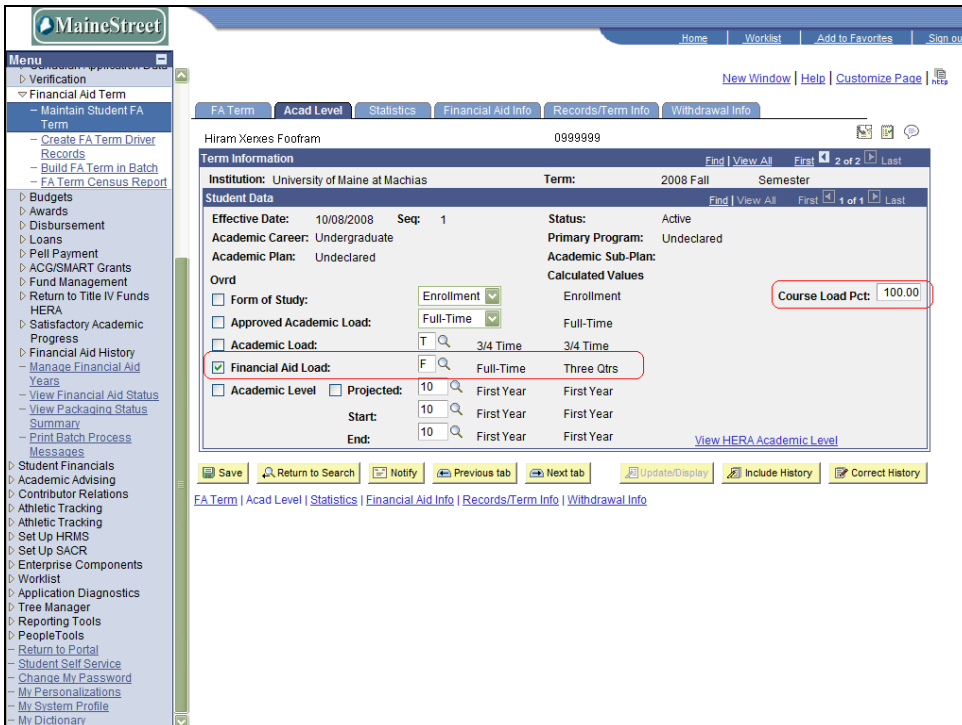
Process Document

Financial Aid: Update FA Term with ISIR Enrollment-092508



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Verification', 'Financial Aid Term', 'Budgets', 'Awards', 'Disbursement', 'Loans', 'Pell Payment', 'ACG/SMART Grants', 'Fund Management', 'Return to Title IV Funds', 'HERA', 'Satisfactory Academic Progress', 'Financial Aid History', 'Manage Financial Aid Years', 'View Financial Aid Status', 'View Packaging Status', 'Summary', 'Print Batch Process', 'Messages', 'Student Financials', 'Academic Advising', 'Contributor Relations', 'Athletic Tracking', 'Athletic Tracking', 'Set Up HRMS', 'Set Up SACR', 'Enterprise Components', 'Worklist', 'Application Diagnostics', 'Tree Manager', 'Reporting Tools', 'PeopleTools', 'Return to Portal', 'Student Self Service', 'Change My Password', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area displays the 'FA Term' page for student Hiram Xenex Foofram (ID: 0999999). The 'Term Information' section shows the institution as 'University of Maine at Machias' and the term as '0910 2008 Fall Semester'. The 'Student Data' section includes fields for 'Ovrd Effective Date' (10/08/2008), 'Seq' (1), 'Status' (Active), and 'Calculated Values' (FA Calc). The 'Override Expiration Date' field is highlighted with a red box and contains the date '10/31/2008'. Other fields include 'Career' (Undergraduate), 'Prim Prog' (UDEC), 'Acad Plan' (UND), 'Sub-Plan', 'Aid Year' (2008-2009 Financial Aid Year), and 'Billing Career' (Undergraduate). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Previous tab', 'Next tab', 'Update/Display', 'Include History', and 'Correct History'.

Step	Action
21.	Return to the student's FA Term page to see the results. On the FA Term page, the Override Expiration Date has been set. Look at the Acad Level page.



The screenshot shows the 'Acad Level' tab in the MaineStreet system. The student's name is Hiram Xenos Foofram (ID: 0999999). The institution is University of Maine at Machias, and the term is 2008 Fall. The 'Financial Aid Load' is checked and set to 'Full-Time'. The 'Course Load Pct' is 100.00. The 'Academic Load' is set to '3/4 Time'. The 'Academic Level' is set to '10' (First Year). The 'Start' and 'End' dates are both set to '10' (First Year).

Step	Action
22.	<p>On the Acad Level tab, note that Financial Aid Load has been overridden and set to Full-Time because that is the load reported on the student's ISIR. Note that the Course Load Percent is now 100.</p> <p>Click the Statistics tab.</p> <p>Statistics</p>

Process Document

Financial Aid: Update FA Term with ISIR Enrollment-092508



The screenshot shows the 'Statistics' page for a student. The 'Units Taken' and 'Units Passed' fields are highlighted with red boxes and set to 12,000. The 'Budget Assign' flag is set to 'Yes Assign'.

Field	Value
Units Taken	12,000
Units Passed	12,000
Budget Assign	Yes Assign

Step	Action
23.	On the Statistics page, note that the Units Taken and Units Passed fields have been overridden and set to the full time value. Click the Financial Aid Info tab. The Budget Assign flag has been set to Yes Assign .
24.	End of Procedure.