



User Guide

Last updated October 31, 2013

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- Demographic Information -

Student: 236010049 Elcks, Laura

FAO: UG Early decision

Name: Elcks _____ Laura _____ Ms. _____ Update _____

(Last) (First) (M) (S)

Birthdate: _____ Sex: _ VetTyp: _ Pell Lifetime El _____

Drivers Lic: _ PerkinsMPN: _____

Prv Nm: _____ Direct MPNs: _____

Sp: _____ Par: _____

Special: Early decision

ATB: AidYear: _____ St: _____ Adm: _____

Date: _____ Cd: _____ Tst: _____

Addresses: _____

Electronic mail address: _____

Student ID and Social Security Number are different fields and can be different numbers

For Ability to Benefit students, enter an ATB aid year when ATB data is ready to report to COD

If you attempt to enter application data before a basic student record exists, you will be rerouted to the Demographic Information screen.

Most bio/demo information comes from a student system by way of the Student Interface

Master promissory note (MPN) IDs for Perkins loans are entered by the Promissory Note Print program; for Direct loans by the DL Import program; Pell LEU is entered by the Federal Grant Import program

If there is a note in the Special field, it is displayed with the student's name on any Student, Application or Award screen

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on file in the interfacing student records or admissions system, much of the information on this screen is retrieved dynamically from the student system.

2. Type in values as appropriate. (Unless your system is set up to allow FINANCIER operators to update information retrieved by the Student Interface, you will not be able to enter or change values in those fields.)
 - The Special field enables you to attach a tag or brief message—such as **NCAA Athlete** or **Academic probation**—to be displayed with the student’s name at the top of all Student, Application and Award screens
 - If you are correcting the student’s name (updating any of the name component fields), you can store the “old” name as well, by typing a Y in the Update Previous Name field
 - Use the Par fields to enter parent ID(s): press PF2 in a Parent field, select the parent name and press ENTER to retrieve the parent ID. (Prior to 2014-15, use the first Parent field for the father, and the second for the mother.)

If there’s no entry for that parent in the selection list you will need to create a record for the parent in the External file. Exit from the selection list via PF11, and (back on the Student Demographic screen) type the parent ID in the Parent field, then press PF9 to expand the field. The Parent Information screen is displayed; supply the name, SSN and other information and press ENTER. Press PF11 to return to the Student Demographic screen.

- For an ability-to-benefit student, enter the ATB data as the information becomes available, then enter the ATB Aid Year when it is complete. The Federal Grant or Direct Loan Export program will then include the ATB fields on Pell, DL and TEACH originations.

3. Press ENTER to create the student’s record in FINANCIER.

Student ID. The fact that the Student ID and Social Security Number are different fields means that your institution may choose to use its own numbering scheme for student IDs and parent IDs if convenient.

Technically, both the Student ID and the SSN are attributes on the student record, and distinct from the internal ID by which the record is keyed. For technical information on student records and the Student Interface, see “Technical Note: Student ID” on page 4-3 and “Technical Note: The Student Interface” on page 4-4.

Parent Data Corrections. Changes made to federally correctable parent fields (SSN, name, date of birth) from the Student Demographic screen (by expanding to the Parent Information screen) will create correction (ECAR) records for subsequent Corrections Export processing.

Budget Groups (Optional)

A budget group is based on the calculation criteria. The institution may define a budget group for a significant combination of values. For example, if the calculation criteria include dependency, residency and year in college, you could define groups for dependent/instate/undergraduate, independent/instate/undergraduate, dependent/out-of-state/undergraduate, etc.

If you wish to have Budget Group descriptions displayed on the Budget Detail window, identify each grouping. These groups may be different in each need analysis methodology for a student.

Special Budget Attributes (Optional)

Special budget attributes are user-defined fields that you can define and maintain to provide budget criteria that are not otherwise stored in FINANCIER or available through the Student Interface. If you have a need for special budget attributes (such as a music major who needs new instrument), identify each attribute code and a description. Up to three codes can be displayed on the Budget Detail window.

Code (2 char)	Description
--------------------------	--------------------

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Verifying Federal Data

Use the Verification screen (Appl>Verification) to enter data for federal verification (and, optionally, institutional verification). Students selected

Year-specific screens are modified annually as needed by WolffPack; the screen title indicates the aid year

Verification - 12:10 PM

Student: 000001295 ARMSTRONG, JOHN S Not in Adm/Reg files

IRS Request/AGI/FI

-----Federal Verification-----

Selection: Institution: Federal: Y V1

Status: Federal:

Re-verification: A Current: 01

STUDENT Verification Federal Data

HS/SEP: --

Fam/Col: -- 1

SNAP: --

CS paid: --

AGI: --

Fed tax: --

Untaxed: --

Oth Utx: --

St inc: --

Sp inc: --

PARENTS

Fam/Col: b1

SNAP: --

CS paid: --

AGI: --

Fed tax: --

Untaxed: --

Oth Utx: --

P1 inc: --

P2 inc: --

Verification group determines fields that must be verified; other fields are protected

Expand STUDENT or PARENTS for next level of verification detail

Enter data in federally mandated verification fields

Depending on year, untaxed income may not be directly updatable at this level

When a student passes federal verification the Status is updated to P and the Reverification flag is set to A (allow automatic reverification)

Manually setting the Status to P results in a Reverification value of M (manual) to prevent automatic reverification)

Selected by the institution or CPS for federal verification

Selected for customized institutional verification

for federal verification by the CPS are flagged in the Selection: Federal field. If your institution selects additional students for federal verification, these students may be flagged with a value in the Selection: Institution field.

The Verification screen provides fields for entering data into the federally mandated verification fields and displays corresponding data from the student's federal record for student and parent. Depending on the year's regulations, some fields may not need to be verified for some students. If a student meets a condition for bypassing evaluation of a field, that field is displayed in the Verification column as protected (green) and the cursor will skip it as you tab through the fields. For example, if (as in 2012-13) the regulations stipulate that Number in College need not be verified if the value from the FAFSA is 1, the field will be protected for any student who reported Number in College as 1. In 2013-14 and later, the student's verification group (displayed beside the Federal selection value Y) determines what verification data are required, and fields that don't pertain to the student's assigned group are protected.

You verify students individually as you enter the data, by means of an online calculation. (Prior to 2013-14 you can enter the data and do the actual verifications in batch, by running the Verification Calculation program (WFVCNCLB).) The verification calculation compares values from the Federal file against corresponding values in the Verification file for parents and student (if the student is dependent) or student (if independent), and

applies year-specific regulatory rules to determine the accuracy of the federal data.

When a student passes verification, the system sets the Federal Verification Status to P (exact match) or T (for pass within federally defined tolerance limit) and sets the Reverification flag. If all required fields were verified the Reverification flag is set to A, which permits reverification by the ADD Load if new federal data is received later for the student.

The Verification screen expands to provide additional level(s) of detail; the content and purpose of each level depends on the aid year.

2012-13: If the IRS Request Flag is set to 02 (for the student if independent, and for both student and parent if dependent), the student is automatically verified if the student's data also meets other federally specified criteria. If any fields were skipped because the student met criteria allowing for an automatic match, the Reverification flag is set to P, indicating the student was verified with partial data. The P value prevents overlay on subsequent verifications, so that the "automatic match" fields, for which no data needed to be supplied, do not overwrite the federal data.

►► To verify a student:

1. Go to the Verification screen (Appl>Verification) with the student in context.
2. Type in data for basic federal verification for student (if independent) or student and parent (dependent student). If there is no untaxed income for the student you can complete the verification work at this top level.

If there is untaxed income to verify, expand to the Required Verification window: from the Parent or Student expansion field, press PF9. When untaxed income component amounts are in place, press ENTER.

3. Press PF5 to evaluate the federal data against the verification data.

When the student has passed federal verification, the Federal Verification Status field is updated to P or T, and a message indicating that verification is complete is displayed on the screen.

4. (2012-13) If institutional verification of need analysis calculation fields is required:
 - Tab to the STUDENT or PARENTS expansion field (from the top level or the Required Verification level, depending on aid year) and press PF9. Fill in verification data in the expansion window and press ENTER.

- If supplemental detail is necessary, press PF9 again, supply the verification data and press ENTER. (If you add or update information at this level, the appropriate composite figures at the higher levels are recalculated automatically.)
 - Press PF11 until you return to the main screen and press PF5 to verify.
5. If verification is one of your FAO Checklist requirements on the Application Requirements screen, and the student has passed verification, go to the Application Requirements screen and press PF5 to recalculate the student's Checklist status and overall application status.
- If you are verifying a student outside of FINANCIER, set the Federal Verification Status to P on the Verification screen once the student has passed. This causes the Reverification flag to be set to M (manual verification) and prevents automatic reverification by the ADD Load or batch Verification Calculation. (However, if you invoke the verification calculation online with the PF5 key, the Reverification setting is ignored and the calculation will be performed.) You can also set the Reverification value directly.

Verifying Veterans' Benefits

Use the Veteran Certification screen to verify a student's veteran status. For a student flagged as a veteran on the ISIR, the screen displays the type of benefits s/he may receive. Selection and status fields are provided for institutional confirmation.

This screen does not automatically generate an award for the student. Veteran benefits must be explicitly awarded in order to be included in the student's financial aid package.

Reviewing Satisfactory Progress

Use the Satisfactory Progress screen on the Applications menu to monitor a student's academic progress. The screen displays a progress evaluation for each term that is calculated or retrieved according to institutionally defined logic. The SAP evaluation may not be updatable manually, depending on your aid office practices, but you can effectively change it by entering an override.

Table 3-1: Summary of Job Setup Information

Member/Function	Parameters		Work Files		Lgth	Print Files	
WFADDIMJ (WFADDIMB) ADD Import Load federal and PROFILE data to WF-ADD file	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	<u>2011-12 and 2012-13</u> 1 ID _{xx} /IG _{xx} /ISRF _{yy} OP (Daily, pushed, requested ISIRs)		4250	1 2	Processing Counts/Errors Replaced ISIR Records
			<u>2013-14</u> 1 ID _{xx} /IG _{xx} /ISRF _{yy} OP (Daily, pushed, requested ISIRs)		4500		
			<u>2014-15</u> 1 ID _{xx} /IG _{xx} /ISRF _{yy} OP (Daily, pushed, requested ISIRs)		4700		
WFADDLDJ (WFADDLDB) ADD Load Load federal and PROFILE data to application processing files Calculation routines invoked: Need analysis Application requirements Budget Verification (federal only)	Aid Year Term FAO Runmode:Limit Date Edit Overrides: Federal Rejects Corrections pending Correctns transmitted Application locked Student Verified Student Packaged	A4 A1 A2 A10 A10 A1 A1 A1 A1 A1 A1	None			1 2 3 4	Processing Counts/Errors Field Value Errors Loaded Students (optional) EFC Mismatch
WFADDPGJ (WFADDPGB) ADD File Purge	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	None			1	Processing Counts/Errors
WFANNNTJ (WFANNNTB/WWPRNTBB) Aid Notification Print aid notification letters	Aid Year Term FAO Runmode:Limit Date Print Order Address Type Format (up to 10)	A4 A1 A2 A10 A10 A1 A1 A1 x 10	4 Interim spool file		4882	1 2	Processing Counts/Errors AN Letters
WFAPPCLJ (WFAPPCLB) Application Requirements (Re)calc Perform mass application requirements calculation	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	None			1 3	Processing Counts/Errors Sample report

Table 3-1: Summary of Job Setup Information (Cont.)

Member/Function	Parameters	Work Files	Lgth	Print Files
WFARNNTJ (WFARNNTB-WWPRNTBB) Application Requirements Notification Print application requirements notification letters	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10 Print Order A1 Address Type A1 Format (up to 10) A1 x 10	4 Interim spool file	4882	1 Processing Counts/Errors 2 ARN Letters
WFAWARDJ (WFAWARDDB) Batch Award Process Post batch award transactions	Not applicable (drives off batch header)	1 Input award transactions 2 Rejected award transactions	80 80	1 Processing Counts/Errors 2 Rejected Transactions
WFBGTCLJ (WFBGTCLB) Budget (Re)calc Perform mass budget calculation	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	None		1 Processing Counts/Errors 3 Sample report
WFDISBSJ (WFDISBSB) Disbursement Process Perform mass disbursement process	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10 Schedule A1 Disbursement Point A1	None		1 Processing Counts/Errors 2 Unprocessed Disbursements 3 Authorized Disbursements
WFDISUMJ (WFDISUMB) Disbursement Summary	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10 Fiscal Year A4	None		1 Processing Counts/Errors 3 Disbursement Summary
WFDLAIMJ (WFDLAIMB) Direct Loan Import Apply Direct Loan acknowledgments for originations and disbursements	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	1 Summary acknowledgment data (from WFDLIMPB) 2 Loan acknowledgment data (from WFDLIMPB)	1179 5993	1 Processing Counts/Errors 2 Problem Records

aaaa	Aid year	(For parameter descriptions and values see “Standard Control Parameters” on page 3-4.)
b	Term	
cc	FAO	
d(10)	Run mode	
ee/ee/eeee	Date	
Edit overrides:		
f	Fed Reject	Option to load data even if the student is a federal reject
g	Corr Pend	Option to load data even if electronic corrections are pending
h	Corr Sent	Option to load data even if electronic corrections have been transmitted
i	Locked	Option to load data even if the student’s application has been locked
j	Verified	Option to load data even if the student has been verified
k	Packaged	Option to load data even if the student has been packaged

Values for each override position are:

(blank) Normal edit; don’t override (default)

Y Yes, override; don’t perform this edit

For example, to prevent rejects based on electronic corrections (the second and third override positions), the parameter record would include a blank for the first override position, followed by two Y’s:

aaaa,b,cc,dddddddddd,ee/ee/eeee,,Y,Y

Database Files Read

ADD file (WF-ADD), Aid Year file (WF-AIDYEAR), CSS file (WF-CSS-xxyy), ECAR file (WF-ECAR), External file (WW-EXTERNAL), Federal file (WF-FEDERAL-xxyy), ISIR file (WF-ISIR-xxyy), Verification file (WF-VERIFY-xxyy), Student file (WW-STUDENT), System file (WW-SYSTEM, for FAO Status Decision entries and FAO Need Analysis defaults)

Processing

Reads the ADD file sequentially. For a federal (source F) record that originated as an ISIR from a student application or correction made by the student, CPS or another institution, determines if:

- The student is a federal reject
- Electronic corrections are pending for the student in FINANCIER
- Electronic corrections have been transmitted for the student in FINANCIER
- The student’s federal application has been locked in FINANCIER
- The student has been verified in FINANCIER
- The student has been packaged in FINANCIER

If any of these conditions is true, rejects the record unless a corresponding override parameter has been set (in which case the condition is ignored). Does not perform these edits on an institutionally corrected ISIR.

For a CSS source C (PROFILE) record checks that the student is not packaged and the application is not locked (unless the packaging or lock override parameter is set). For a CSS source N (non-custodial parent) record, ensures that a corresponding C record exists.

For source N, flags the existing CSS record. For federal (source F) or PROFILE (source C) applications, checks the record against the ADD Load criteria defined in the FAO Status Decision Table (refers to the Fedl ADD row to check federal data, or Prof ADD row to check PROFILE data). If the record passes this edit, loads the data into the application processing files.

- For ADD records of source C (CSS), populates the Student file and year-specific CSS file
- For ADD records of source F (federal), populates the Student file and year-specific ISIR file, NSLDS file, Federal file and CPS file

Uses the aid year, term and FAO from the control parameters to compose the record keys. Translates source values to FINANCIER values, checking all values against the FINANCIER Dictionary.

Marks rejected ADD file records, changing the Reject flag from N (new) to R and entering a corresponding value in the Reject Reason field.

For federal records, creates or updates parent (External) record(s) for the parent(s). Invokes subroutine DETERMINE-PID (WWDTPID) to return the external ID, based on the SSN. If no External record exists for the parent, one is created. If an External record does exist, the name and DOB are compared to the ISIR values, and updated if the ISIR values are different and not blank. (If the parent's first initial on the ISIR coincides with the first name currently stored, the first name is left intact. The External name is parsed as last name, first name.) Checks the Student record and adds the parent ID to the student's record if it is not found in either parent field. (Before 2014-15, associates the first parent field with the father and the second with the mother; adds a new parent ID to the appropriate field, or if a parent ID is found in the wrong field, flips it to the right one.)

Performs budget, application requirements, need analysis and verification calculations based on newly loaded application data.

For the budget calculation, checks for FAO-specific conditions which affect costs, such as state residency. Totals the contents of FAO-specific