FINANCIER ®

User Guide

Last updated October 26, 2015

received, the Federal ID, DRN and College code fields are protected against further online update.)

```
                                      0 CPS Communication -              09:38 AM
       Student:  005741608  Hemingway, Sylvia J
              FAO:    UG
      -Student Identification-    ----CPS Designation---   -------Eligibility------
       FedID:   005741608 HE 01   Dependency:        Y  Verification:
       DRN:             ____       Primary EFC:    99,999  Pell eligible:
       College:         _____      FISAP inc:               Spec circ:      SAR C:
                                   Reje                     ATEx:   Stu:    Par:
      -------FAO Action------                               IRS AGI: Stu:    Par:
      Institution change:  _       Comm                     IRS FIT: Stu:    Par:
                                                            IRS DIS: Stu:    Par:
      Loan default override: _                              SSA ident/citizen:
                                                            DHS:
      -------------Communication Activity------------       SelServ req/stat:
      Original app:                 ETI:     EFC:           Veterans adm:
      Current tran:                 Pushed:  Rej:           DOD qualif:
                                             SARC:          Parent1/Parent2 SSA:
      Corrections:    N                      Ver:           High sch:
                                                            NSLDS dftl/results:
```

▸▸ If a student is flagged by the NSLDS as being in loan default, even though the default condition has already been resolved, you can override the NSLDS setting to resume disbursement of federal aid to the student. To override an NSLDS loan default setting, type Y in the Loan Default Override field on the CPS Communications screen and press ENTER.

In response to a request entered in one of the FAO Action fields, the system sets the Submit flag on the student's Electronic Corrections record so that the request can be transmitted to the CPS.

Student and Parent Identification Information

The student and parent identification information that is displayed on the Federal FAFSA screen (including name, SSN, date of birth, address) comes from the Student file/Student Interface and External file, to keep institutional control over these important fields, to generate corrections based on institutionally established information, and to ensure coordination between FINANCIER and your student system. The institutional data may differ from corresponding year-specific information on the ISIR.

The year-specific information may be needed in some situations–for exam-

ple, if there is a change in custodial parent from one year to the next, or when accessing FAA Online or COD for student or parent information. When needed, the student name, SSN, date of birth and address, and parent names, SSNs and dates of birth from the current ISIR are available by expansion from the CPS Communication screen, on the ISIR Information window.

▸▸ To see year-specific student and parent identification data from the current ISIR, tab to the expansion field that follows the FedID label on the CPS Communications screen and press the Expand key (PF9). (You can determine the transaction number of the current ISIR from the last two digits of the student's Federal ID.)

Reviewing Student Budgets

Use the Budget/Need Evaluation screen (Appl>Budget/Need Evaluation) on the Applications menu for a summary of costs, family contribution and remaining need.

Budgets are calculated initially by the ADD Load process for each methodology in use, by term or year according to how the budget calculation routine has been set up. You can enter or change budget components and amounts for an individual student online.

```
┌─────────────────────────────┐
│ The screen title includes the aid year that is      Budget/Need Evaluation -          10:02 AM
│ currently in context
└─────────────────────────────┘
   Student:  005637399  Akim, Francis        ┌──────────────────────────────────────────┐
            FAO:    UG                        │ Budget is calculated for each methodology in use
                                              │ Expand the column to change budget line items
                                              └──────────────────────────────────────────┘
                                   FM(9Mo)FT        FM(9Mo)          INAS IM
     Budget:                      L 16,050      _ 18,725  T     _ 16,050
      Registration ┌──────────────┐  10,000_        12,500           10,000_
      Housing/board│ Budget may be │   5,000_ ┌────────────────────┐  5,000_
      Books/supplie│ locked against future│    550_ │ T indicates that term │   550_
      Transportatio│ recalculation │        150_ │ budgets have been entered │ 150_
      Dependent care:                  100_ │ and the aid year totals are │ 100_
      Other costs:                     250_ │ calculated          │       250_
      Other costs:                  _____ └────────────────────┘ _____
      Other costs:                  _____                        _____
     EFC:                           4,000  ┌────────────────────┐ ┌ 13,000  O ┐
      Stu Contribution:             4,000  │ Expand the IM EFC   │ │  5,000    │
      Par Contribution:                    │ to override calculated│└──────────┘
      Other resources:                     │ student or parent   │    8,000_
                                           │ contribution        │
     Need:        ┌──────────────┐ 12,050  │                     │    3,050
                  │ Need = Budget – EFC │   │ O indicates an EFC  │
                  └──────────────┘         │ override in effect  │
                                           └────────────────────┘
```

Implementation

Default budget components, conditions and amounts are defined in the budget calculation process during implementation of FINANCIER, and updated as needed for each new aid year. Use the worksheets on page 2-46

Packaged awards are posted as offers, and you typically post acceptances, rejections and cancellations online (although input to the packaging process does provide the option to request that awards be generated as "offer and accept" or "offer2 and accept increase"). You can make online adjustments to a student's aid package, and enter awards manually.

Posting Awards Online

Like batch awarding, online awarding is essentially a matter of applying award transactions. An award transaction consists of an <u>action</u> (such as an offer or acceptance), the <u>amount</u> to be applied, and its <u>distribution</u> (how it is to be paid across disbursement points). Table 2-2 on page 2-60 lists the possible actions and summarizes input requirements for entering award transaction online.

To process award transactions online, use the Award Summary or Award screen. Use the Summary screen if you are working with multiple funds, and the Award screen if you are working with a single fund. For example, if you're entering several awards from different funds for a student, the Award Summary screen is more convenient; if you're entering a series of awards from the same fund to different students, the Award screen is more convenient.

⊪ To enter an award offer (on the Award Summary screen):

1. Go to the Award Summary screen (Award>Award Summary) with the student in context.

```
┌─────────────────────────────────────────────────────────────────────────┐
│  ┌───────────────────────────────────────┐                               │
│  │ The screen title includes the aid year │     Award Summary -       04:03 PM │
│  │ that is currently in context           │                               │
│  └───────────────────────────────────────┘                               │
│  Student:  123456779  Abat, Robert                                        │
│          FAO:    UG                                                       │
│                                                                Unmet Need │
│   Action (all awards): __                                                 │
│          Fund                       Offered     Accepted    Disbursed     │
│     DIRECT-PL                       2,000.00                              │
│     Pell_____  ┌────────────────────────────┐   ┌─────────────────────────────┐ │
│     _____  │ To enter a new award, specify │  │ Aid year totals are displayed for │ │
│     _____  │ the fund ID (use PF2 for a   │  │ each award on file           │ │
│     _____   │ selection list)             │   └─────────────────────────────┘ │
│     _____   └────────────────────────────┘                          │
│ ┌──────────────────────┐ ┌────────────────────────────┐ ┌─────────────────────────────┐ │
│ │ Packaging Status is   │ │ Aid notification formats for  │ │ Application status and Disbursement │ │
│ │ generated by WFPKPAKB  │ │ initial and followup letters  │ │ status as last calculated       │ │
│ │ for students packaged  │ │ (entered by the Application   │ └─────────────────────────────┘ │
│ │ in batch              │ │ Requirements calculation)     │                            │
│ └──────────────────────┘ │ can be reset                │                            │
│                          └────────────────────────────┘                            │
│   Packaging status: _              Application status:        Complete    │
│   I/F formats: AN: F R   AD: _ _   Disbursement status:       Incomplete  │
│   AN/DN print:   _ __              Most recent notification:               │
└─────────────────────────────────────────────────────────────────────────┘
```

2. Tab to a blank Fund field (past the invisible expansion field in front of the input field) and specify the Fund ID from which the award is to be

made, then press ENTER. (You can press the PF2 key from the Fund field for a fund selection list.)

3. In the resulting detail window, type O (offer) in the Action field and specify the amount of the offer and the distribution:

```
                                    Pel        AWARD DISTRIBUTION RULE
    Specify the action, total offer            A          Even AcadYear split
    amount and distribution                    F          Even Fall split
                                               M          Even Summer split
    Action: O    2000_____  _                 S      Distribution rules divide the
                                               W      award across disbursement
                            Fall               1      points according to fractions
                  _____ Spring             2      defined in the Distribution
Disbursement points are those                  3      Codes Table
defined in the Schedule Table  _____ Summer 1
                  _____ Summer 2           4          All in Late Winter
                                               5          All in Early Spring
  If no distribution rule applies, specify     6          All in Late Spring
  disbursement amounts by distribution point that 7       All in Early Summer
  sum to the total offer amount                8          All in Late Summer
```

- If the distribution follows a typical pattern for which a Distribution Rule has been defined, enter the rule in the field following the Action and Amount fields. (You can use PF2 for a list of distribution rules; select one that is valid for the schedule.)

- Otherwise, leave the Distribution Rule field blank and type disbursement amounts in the appropriate disbursement point fields; the sum of the amounts entered must equal the offer total.

4. Press ENTER to process the offer.

The system updates the student's aid year totals and displays the amounts distributed to each disbursement point.

5. Press PF11 to return to the main screen, where you'll see the offer total displayed.

6. You may wish to set the Packaging Status and review/reset the Aid Notification formats. Press ENTER to save any changes.

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>2013-14</u> 1 ID<u>xx</u>/IG<u>xx</u>/ISRF<u>yy</u>OP (Daily, pushed, requested ISIRs) <u>2014-15</u> 1 ID<u>xx</u>/IG<u>xx</u>/ISRF<u>yy</u>OP (Daily, pushed, requested ISIRs) <u>2015-16</u> and later 1 ID<u>xx</u>/IG<u>xx</u>/ISRF<u>yy</u>OP (Daily, pushed, requested ISIRs)	 4500 4700 4300	1 2	Processing Counts/Errors Replaced ISIR Records

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 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 Processing Counts/Errors 2 ARN Letters
WFAWARDJ (WFAWARDB) 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 Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	None		1 Processing Counts/Errors 3 Sample report
WFDISBSJ (WFDISBSB) Disbursement Process Perform mass disbursement process	Aid Year Term FAO Runmode:Limit Date Schedule Disbursement Point	A4 A1 A2 A10 A10 A1 A1	None		1 Processing Counts/Errors 2 Unprocessed Disbursements 3 Authorized Disbursements
WFDISUMJ (WFDISUMB) Disbursement Summary	Aid Year Term FAO Runmode:Limit Date Fiscal Year	A4 A1 A2 A10 A10 A4	None		1 Processing Counts/Errors 3 Disbursement Summary

WFDLAIMJ (WFDLAIMB) Direct Loan Import
 	
Apply Direct Loan acknowledgments for originations and disbursements
	Aid Year
	Term
	FAO
	Runmode:Limit
	Date
		A4
		A1
		A2
		A10
		A10
			1 Summary acknowledgment data (from WFDLIMPB)
			2 Loan acknowledgment data (from WFDLIMPB)
			   before 2014-15
			   2014-15
			   2015-16 and later
				1179
				
				5993
				6002
				6009
					1 Processing Counts/Errors
					2 Problem Records

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

Member/Function	Parameters		Work Files		Lgth	Print Files	
WFDLEXPJ (WFDLEXPB) Direct Loan XML Create Generate Direct loan XML document for reporting to COD	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	1 2 3	Summary (from WFDLNEXB) Student-specific loan data (from WFDLNEXB) 2013-14 2014-15 and later XML Common Record documents, DL-specific	69 838 1009 var	1	Processing Counts/Errors
WFDLIMPJ (WFDLIMPB) Direct Loan XML Import Translate Direct loan acknowledgment data from XML	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A1	1 2 3	Summary acknowledgment data Loan acknowledgment data before 2014-15 2014-15 2015-16 and later XML response documents	1179 5993 6002 6009 400	1	Processing Counts/Errors
WFDLNEXJ (WFDLNEXB) Direct Loan Export Export Direct loan originations/corrections/disbursements export data for input to XML Create process	Aid Year Term FAO Runmode:Limit Date Export Selection	A4 A1 A2 A10 A10 A6	1 2 	Summary Student-specific loan data 2013-14 2014-15 and later	69 838 1009	1 2 3 4	Processing Counts/Errors Untransmitted Loans Report DL Prom Note Manifest DL PLUS Prom Note Manifest
WFDNNNTJ (WFDNNNTB/WWPRNTBB) Aid Denial Notification Print aid denial 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 3	Processing Counts/Errors DN Letters
WFDRNNTJ (WFDRNNTB-WWPRNTBB) Disbursement Requirements Notification Print disbursement requirement 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 DRN Letters

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

Member/Function	Parameters		Work Files		Lgth	Print Files	
WFDSBCLJ (WFDSBCLB) Disbursement Requirements (Re)calc Perform mass disbursement requirements calculation	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	None			1	Processing Counts/Errors
WFECAIMJ (WFECAIMB) EDE Rejected Corrections Import Import rejected EDE Correction records from the CPS	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	4	COREyyOP (Rejected Corrections)	140	1 2	Processing Counts/Errors Import Errors
WFECOEXJ (WFECOEXB) EDE Corrections Export Export EDE Correction records to the CPS	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	1	CORRyyIN (Corrections)	680	1 3	Processing Counts/Errors Sample report
WFFLAIMJ (WFFLAIMB) Federal Grant Reporting Import Apply Pell and TEACH acknowledgment data	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A10	1 2	Summary acknowledgment (from WFFLIMPB) Student-specific acknowledgments (from WFFLIMPB)	1179 5781	1 2 3	Processing Counts/Errors Problem Records Sample report

WFFLEXPJ (WFFLEXPB)
Federal Grant XML Create
 	
Generate XML document for reporting Pell and TEACH data to COD
	Aid Year
	Term
	FAO
	Runmode:Limit
	Date
		A4
		A1
		A2
		A10
		A10
			1
			2
			
			3
				Summary (from WFFLREXB)
				Student-specific export data (from WFFLREXB)
				  2013-14
				  2014-15 and later
				Common Record documents, grant-specific
					69
					
					448
					592
					var
						1	Processing Counts/Errors

WFFLIMPJ (WFFLIMPB) Federal Grant XML Import Translate Pell and TEACH acknowledgment data from XML	Aid Year Term FAO Runmode:Limit Date	A4 A1 A2 A10 A1	1 2 3	Summary acknowledgment Student-specific acknowledgment data XML response documents	1179 5781 400	1	Processing Counts/Errors

Requirement Type 16	The function with which the requirement is associated. Values are: A Application D Disbursement
Term 17	The registration term to which the requirement applies. Use a value defined for WWSYSVRD.WW-REGISTRATION-TERM
Document type 18	The type of required document. Values are: S Standard document to be submitted by the student T Financial aid transcript from another institution
Document fre-quency 19-20	For an update to a standard document requirement, indicates how often the document must be submitted. For Doc Type S, values are: ST Submit once AY Submit once per aid year For Doc Type T, the value should be blank.
21	blank
Document ID 22-29	The standard document to be updated. Use a value defined for WFREQMTD.WF-RE-DOC-ST-DOC.

Transcript File:

Aid Program 16-20	The type of financial aid (work/study program, Direct loan program, etc.) for which transcript information is to be maintained. Use a value defined for the field WFTSCPTD.WF-AID-PROGRAM.
21-29	blank

All other files (excluding those that cannot be updated by this process: Award, ISIR, ECAR)

16-29	blank

Work File Input

Work File 1, containing input transactions created by a transaction-generating program or by a text editor or other manual process

(For example, to apply transactions generated by WFPKPAKB, assign the WFPKPAKB output in Work File 3 as Work File 1 for input to WFMAINTJ.)

Processing

Reads input from Work File 1. Performs preliminary edits: ensures that there is a batch header and that records do not exceed the maximum length of 100. Writes rejected transactions to Work File 2 (enters a Reject Reason code in position 21 on the transaction).

Writes accepted transactions to Work File 3 and sorts them by file for processing by WFMAINTB.

Database Files Updated

None

WFMAINTB (Batch Maintenance Update)

Run the Batch Maintenance job to apply transactions to update the FINANCIER database. The job (WFMAINTJ) executes two programs: WFMAINPB (described on page 3-95), which organizes the transactions, and WFMAINTB, which updates the files.

Timing

Run as needed for general database maintenance. To apply transactions generated by WFPKPAKB, you would run Batch Maintenance in conjunction with the Batch Award Process (WFAWARDB, which applies the corresponding award transactions).

Work File Input

Work File 3, containing edited and sorted transactions from WFMAINPB.

Processing

Checks the user ID on the batch header against the Security file.

Reads the transactions in Work File 1 sequentially. For each transaction, validates the file name. Calls a file-specific program (identified by the first seven characters of the file PDA name, followed by B–for example, WWSTDNTB to process a student record) to perform the update.

Checks that the update field specified on the transaction (positions 30-70) is maintainable in batch.

Validates values against the Dictionary, and returns information from the Dictionary:

- whether there is a value in any of the Utility Update fields, indicating utility updates should be performed (the base system supports two: audit updates, value A, and need analysis calculation, value C)

- whether there is a SAR (Student Aid Report), DSL (Direct Student Loan) or DPL (Direct PLUS Loan) field number, indicating corresponding federal data corrections or loan corrections should be stored

If the file is student-specific and aid-year-related, and the Activate Student value on the batch header is set to Y, posts the update value and activates the student for the aid year. If the Activate Student value is set to N, posts the update value only if the student has already been activated; otherwise, rejects the transaction.

If the file is not student-specific and not aid-year-related, ignores the batch

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