



User Guide

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

CPS Communication - 09:38 AM

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

```

Student: 005741608 Hemingway, Sylvia J
FAO: UG
-----Student Identification-----
FedID: 005741608 HE 01
DRN:
College:
-----FAO Action-----
Institution change:
Loan default override:

-----CPS Designation-----
Dependency: Y
Primary EFC: 99,999
FISAP inc:
Reje
Comm

-----Eligibility-----
Verification:
Pell eligible:
Spec circ: SAR C:
ATEX: Stu: Par:
IRS AGI: Stu: Par:
IRS FIT: Stu: Par:
IRS DIS: Stu: Par:
SSA ident/citizen:
DHS:
SelServ req/stat:
Veterans adm:
DOD qualif:
Parent1/Parent2 SSA:
High sch:
NSLDS dftl/results:

-----Communication Activity-----
Original app: ETI: EFC:
Current tran: Pushed: Rej:
SARC:
Ver:

Corrections: N
  
```

Use these fields to enter requests. A request generates an ECAR record

Press PF2 on a comment code to read its translation

Federal ID field expands (via PF9) to display year-specific student and parent names, SSNs and birth dates from the current ISIR

- ▶ 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 currently in context

Budget/Need Evaluation - 10:02 AM

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:	16,050	18,725	16,050
Registration	10,000	12,500	10,000
Housing/board	5,000		5,000
Books/supplies	550		550
Transportation	150		150
Dependent care:	100		100
Other costs:	250	250	250
Other costs:			
Other costs:			
EFC:	4,000		13,000 O
Stu Contribution:	4,000		5,000
Par Contribution:			
Other resources:			8,000
Need:	12,050		3,050

Need = Budget - EFC

Budget may be locked against future recalculation

T indicates that term budgets have been entered and the aid year totals are calculated

Expand the IM EFC to override calculated student or parent contribution

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 “offer 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 action (such as an offer or acceptance), the amount to be applied, and its distribution (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 that is currently in context

Award Summary -

04:03 PM

Student: 123456779 Abat, Robert
FAO: UG

Unmet Need

Action (all awards):	Fund	Offered	Accepted	Disbursed
DIRECT-PL		2,000.00		
Pell				

Packaging Status is generated by WFPKPAKB for students packaged in batch

Aid notification formats for initial and followup letters (entered by the Application Requirements calculation) can be reset

Aid year totals are displayed for each award on file

Application status and Disbursement status as last calculated

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.)

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

The screenshot shows a terminal window titled "AWARD DISTRIBUTION RULE". The main input area contains "Action: O 2000" followed by four blank lines for distribution points labeled "Fall", "Spring", "Summer 1", and "Summer 2". A "Pell" label is visible above the first distribution point. A callout box points to the "Action" field with the text "Specify the action, total offer amount and distribution". Another callout box points to the distribution point fields with the text "Disbursement points are those defined in the Schedule Table". A third callout box points to the distribution point fields with the text "If no distribution rule applies, specify disbursement amounts by distribution point that sum to the total offer amount". To the right, a list of distribution rules is shown, with a callout box pointing to it that says "Distribution rules divide the award across disbursement points according to fractions defined in the Distribution Codes Table".

A	Even AcadYear split
F	Even Fall split
M	Even Summer split
S	
W	
1	All in Late Winter
2	All in Early Spring
3	All in Late Spring
4	All in Early Summer
5	All in Late Summer
6	
7	
8	

- 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.
- Press ENTER to process the offer.
The system updates the student's aid year totals and displays the amounts distributed to each disbursement point.
 - Press PF11 to return to the main screen, where you'll see the offer total displayed.
 - 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 A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	<u>2013-14</u> 1 ID _{xx} /IG _{xx} /ISRF _{yy} OP (Daily, pushed, requested ISIRs) <u>2014-15</u> 1 ID _{xx} /IG _{xx} /ISRF _{yy} OP (Daily, pushed, requested ISIRs) <u>2015-16 and later</u> 1 ID _{xx} /IG _{xx} /ISRF _{yy} OP (Daily, pushed, requested ISIRs)	4500 4700 4300	1 Processing Counts/Errors 2 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 A4 Term A1 FAO A2 Runmode:Limit A10 Date A10 Edit Overrides: Federal Rejects A1 Corrections pending A1 Correctns transmitted A1 Application locked A1 Student Verified A1 Student Packaged A1	None		1 Processing Counts/Errors 2 Field Value Errors 3 Loaded Students (optional) 4 EFC Mismatch
WFADDPGJ (WFADDPGB) ADD File Purge	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	None		1 Processing Counts/Errors
WFANNNTJ (WFANNNTB/WWPRNTBB) Aid Notification Print aid 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 AN Letters
WFAPPCLJ (WFAPPCLB) Application Requirements (Re)calc Perform mass application requirements calculation	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	None		1 Processing Counts/Errors 3 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) before <u>2014-15</u> <u>2014-15</u> <u>2015-16</u> 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 A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	1 Summary (from WFDLNEXB) 2 Student-specific loan data (from WFDLNEXB) <u>2013-14</u> <u>2014-15</u> and later 3 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 A4 Term A1 FAO A2 Runmode:Limit A10 Date A1	1 Summary acknowledgment data 2 Loan acknowledgment data before <u>2014-15</u> <u>2014-15</u> <u>2015-16</u> and later 3 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 A4 Term A1 FAO A2 Runmode:Limit A10 Date A10 Export Selection A6	1 Summary 2 Student-specific loan data <u>2013-14</u> <u>2014-15</u> and later	69 838 1009	1 Processing Counts/Errors 2 Untransmitted Loans Report 3 DL Prom Note Manifest 4 DL PLUS Prom Note Manifest
WFDNNNTJ (WFDNNNTB/WWPRNTBB) Aid Denial Notification Print aid denial 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 3 DN Letters
WFDNRNTJ (WFDNRNTB-WWPRNTBB) Disbursement Requirements Notification Print disbursement requirement 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 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 A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	None		1 Processing Counts/Errors
WFECAIMJ (WFECAIMB) EDE Rejected Corrections Import Import rejected EDE Correction records from the CPS	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	4 COREyyOP (Rejected Corrections)	140	1 Processing Counts/Errors 2 Import Errors
WFECOEXJ (WFECOEXB) EDE Corrections Export Export EDE Correction records to the CPS	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	1 CORRyyIN (Corrections)	680	1 Processing Counts/Errors 3 Sample report
WFFLAIMJ (WFFLAIMB) Federal Grant Reporting Import Apply Pell and TEACH acknowledgment data	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	1 Summary acknowledgment (from WFFLIMPB) 2 Student-specific acknowledgments (from WFFLIMPB)	1179 5781	1 Processing Counts/Errors 2 Problem Records 3 Sample report
WFFLEXPJ (WFFLEXPB) Federal Grant XML Create Generate XML document for reporting Pell and TEACH data to COD	Aid Year A4 Term A1 FAO A2 Runmode:Limit A10 Date A10	1 Summary (from WFFLREXB) 2 Student-specific export data (from WFFLREXB) 2013-14 2014-15 and later 3 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 A4 Term A1 FAO A2 Runmode:Limit A10 Date A1	1 Summary acknowledgment 2 Student-specific acknowledgment data 3 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 frequency 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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