



User Guide

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- For a list of students with corrections in process, go to the Electronic Corrections screen on the Applications (Appl) menu.

The screen title includes the aid year that is currently in context

| StudentID | Student Name | FAO | New/Rej | Reject Date | Submit |
|-----------|-----------------------|-----|---------|-------------|--------|
| 005741608 | Hemingway, Sylvia J | U | N | | C |
| 378582609 | Miller, Samuel | U | N | | R |
| 007743329 | Morrison, Lewis M | U | N | | C |
| 005840449 | Pelletier, Danielle L | U | N | | N |

A New record results from a correction; a Reject is a correction that has been rejected by the CPS for errors

Submit flag:
C - corrections ready for submission to Export process
N - not ready for submission
R - ISIR has been requested

Last: * _____ First: * _____

Tab to appropriate value and press Expnd to select

To restrict the size of the list, type the limiting characters, followed by an asterisk unless you are looking for an exact match, in the Last name and/or First name fields and press ENTER. For example, to list only students with last names that begin with D, type D* in the Last name field; to find corrections for Andrea Delgado, specify Delgado with no asterisk.

- To see correction record detail, tab to the student's name on the Electronic Corrections screen and press PF9. The expansion window displays corrections by SAR field number. If needed, you can overwrite the correction field number or value. To delete a correction, blank out the field number

Student: 005741608 Hemingway, Sylvia J
FAO: U

New/Rej: N Reject date: SSN error: Record rejects:
Submit: C Tran error:

| Field | Value | Error | Field | Value | Error |
|-------|-------|-------|-------|-------|-------|
| 038 | 2 | | 051 | * | |
| 0A1 | 1 | | | | |

The SAR field number identifies a corrected field. Field numbers that begin with OR or OA identify federal reject and assumption overrides.

The new value is displayed. A correction can be altered manually on this screen if appropriate.

An asterisk (*) value means a numeric field has been changed to a blank.

and value.

For reject records, the following fields help you diagnose the problem:

- A value in the SSN Error or Tran Error field denotes a problem with the SSN or transaction number part of the student's federal ID
- A value in the Record Rejects field indicates a technical problem with the record or transmission
- A value in an Error field indicates a data problem

Press PF2 from the field for the meaning of the error code.

- To prevent processing of a correction for export, set the Submit value on the Electronic Corrections expansion window to N and press ENTER.

Student: 005741608 Hemingway, Sylvia J
FAO: O

| | | | |
|------------|--------------|-------------|-----------------|
| New/Rej: N | Reject date: | SSN error: | Record rejects: |
| Submit: C | | Tran error: | |

- To purge *all* electronic corrections for a student:
 1. On the Electronic Corrections screen, tab to the student and press PF9.
 2. Press PF5 (Purge).
 3. Press ENTER to confirm that you want to delete all corrections displayed. (To exit without purging, press PF11.)

Initiating EDE Requests

You can request the CPS to take certain actions involving a student's federal aid application, using the FAO Action fields on the CPS Communications screen. This screen provides the information needed to transmit and receive federal data, and is used for Pell reporting as well as professional judgment requests. The screen also summarizes CPS decisions on the student's dependency status, selection for verification, Pell eligibility, etc. See Field Help on CPS Designation and Eligibility fields for details.

- To request a first ISIR, as a change of institution correction for a student that did not originally include the institution among the ten to receive the application information, provide the student's Federal ID and DRN and the institution's College code on the CPS Communications screen. Type Y in the Institution Change field and press ENTER. (Once an ISIR has been

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

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

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

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

CPS Communication - 11:54 AM

Student: 005741608 Hemingway, Sylvia J Admission Approved
FAO: UG test2

-Student Identification-
FedID: 005741608 HE 01
DRN: _____
College: _____

-----FAO Action-----
Institution change: _
Loan default override: _

Press PF2 on a comment
code to read its translation

-----CPS Designation---
Dependency:
Primary EFC: 99,999
FISAP inc:
Reject codes:
Comment codes:

-----Eligibility-----
Verification:
Pell eligible:
Spec circ: SAR C:
ATEX: 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:

- 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

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

The screenshot shows the FAFSA verification interface. At the top, a box notes: "Year-specific screens are modified annually as needed by WolffPack; the screen title indicates the aid year". The header displays "Verification -" and the time "10:59 AM".

On the left, a box explains: "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".

The main form contains the following fields and values:

- Student: 746231061 ADAMS, ERNESTINE
- IRS Request: Stu: Par: DTL
- Selection: Institution: Federal: Y V1
- Status: - Federal: -
- Re-verification: - Current: 03
- STUDENT Verification Federal Data PARENTS Data
- HS/SEP: - -
- Fam/Col: - - Fam/Col: 3 1
- AGI: - - - - - AGI: 90,000
- Fed tax: - - - - - Fed tax: - - - - -
- Untaxed: - - - - - Untaxed: 2,030
- St inc: - - - - - P1 inc: 70,000
- Sp inc: - - - - - P2 inc: 20,000

Annotations and arrows point to specific fields:

- "Expand DTL for IRS Data Retrieval field flags" points to the DTL field.
- "Selected for customized institutional verification" points to the DTL field.
- "Selected by the institution or CPS for federal verification" points to the Institution field.
- "Current federal transaction no." points to the Current field.
- "Verification tracking group determines fields that must be verified; other fields are protected" points to the Federal field.
- "Expand STUDENT or PARENTS for next level of verification detail" points to the STUDENT and PARENTS fields.
- "Enter data in federally mandated verification fields" points to the AGI field.
- "Depending on year, untaxed income may not be directly updatable at this level" points to the Untaxed field.

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 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. 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. 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.

►► 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. 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.

- To view student and parent IRS Data Retrieval Tool field flags, which indicate whether FAFSA information such as the AGI and Federal Income Tax were retrieved from a filed tax return, expand (PF9) the DTL field.

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.