

**Student  
Information Systems**



**Needs  
Analysis  
Module**

**Procedure Manual**



# South Dakota Colleague System Procedures

## Table of Contents

Revisions with this Update .....	4
PREFACE .....	5
Colleague System Instructions .....	6
Function keys .....	12
Search Procedures .....	13
Record Search Overview .....	15
Individual and Corporation Record Relationship .....	17
Flagging records on a resolution screen .....	19
Using a savedlist to process large numbers of records .....	20
Updating Core Fields During ISIR Import .....	21
Preventing Duplicate PERSON Records .....	26
Overview of Steps for Setting Up Student Budgets .....	27
Defining Budget Components .....	28
Defining Budget Assignment Rules .....	30
Summary Steps for Setting Up Budget Enrollment .....	32
Duration .....	32
Indicating a Source for Enrollment Duration Data .....	33
Mapping FAFSA Intended Enrollment .....	34
Creating Full/Part-Time Enrollment Definitions .....	35
Copying Budget Components to a New Award Year .....	36
Copying Budget Assignment Rules to a New Award Year .....	37
Verifying Budget Assignment Rules and Components .....	38
Procedure for Copying Budget Components and .....	39
Assignment Rules to a New Award Year .....	39
Need Analysis Import Tasks .....	40
Importing Files from SAIG .....	41
Importing ISIR Data into Colleague .....	42
Checking ISIRS (original, corrections and system gens) .....	45
Using the Birthdate Variance Report (BDVR) Form .....	46
Generating the Birthdate Variance Report .....	47
Reporting Unconverted Records .....	48
Converting Individual ISIR Records .....	49
Batch Processing of Unconverted Records .....	51
Deleting Unconverted Records .....	52
The Need Analysis Summary (NASU) Form .....	53
The Application Workflow Choices (NAWC) Form .....	54
Creating a Supplemental Application From Federally .....	55
Flagged ISIRs .....	55
Comparing to the Federally Flagged ISIR Transaction .....	56
Viewing/Maintaining General Application Information .....	57
<i>Student FA Demographic Data (SD06) Form</i> .....	57
<i>Student FA Interests (SI06) Form</i> .....	57
<i>Student FA Financial Data (SF06) Form</i> .....	57
<i>Dependency Status Questions (DS06) Form</i> .....	57
<i>Parent FA Demographic Data (PI06) Form</i> .....	57
<i>Parent FA Financial Data (PF06) Form</i> .....	57
<i>Releases/Signatures for FAFSA (RS06) Form</i> .....	57
<i>Supplemental Calc Studnt Data (SCSD) Form</i> .....	58
Accessing the NSLDS Forms .....	59
NSLDS Aggregate Information (NAGI) Form .....	60
NSLDS Loan/Pell Info (NLPI) Form .....	61
NSLDS Loan Detail Info (NLDI) Form .....	62
NSLDS Information Summary (NLIS) Form .....	63
Viewing General CPS Information .....	64

# South Dakota Colleague System Procedures

<i>Accessing the CPSI Form</i> .....	64
Overriding Reject Codes .....	65
<i>Reject Codes on the CPSR Form</i> .....	65
Suppressing Assumptions.....	68
Printing ISIRs .....	69
Printing Need Analysis Worksheets in Colleague.....	70
Viewing and Maintaining Calculation Results .....	71
Viewing Intermediate Calculation Values.....	72
Adjusting Supplemental EFCs.....	73
<i>SUPP Type Transaction</i> .....	73
Calculating EFCs for a Group of Students .....	74
Assigning Budget Components to Groups of Students .....	75
Automatically Assigning Budget Components to Individual Students .....	77
Manually Assigning/Overriding Automatic Assignment .....	78
Overriding Budget Duration Specified by Rules for a Group of.....	79
Students .....	79
Overriding Budget Duration Parameters for an Individual Student .....	80
<i>Recalculating Assigned Budget Components for a Group of Students</i> .....	80
<i>Recalculating Budget Expense for an Individual Student</i> .....	81
Freezing/Unfreezing Components of a Student.....	82
Budget .....	82
Producing the Student Budget Detail (SBDT) Report.....	83
Creating Initial Application Export Files .....	84
Creating Correction Application Export Files .....	85
Requesting Initial ISIRs .....	86
ISIR Verification Processing (IVER) Form .....	87
ISIR Student Verification (ISSV) Form .....	88
ISIR Parent Verification (ISPV) Form .....	89
Selecting Groups of Students for Verification.....	90

# South Dakota Colleague System Procedures

## **Revisions with this Update**

New cover page

## **New preface**

# South Dakota Colleague System Procedures

## **PREFACE**

# South Dakota Colleague System Procedures

## Colleague System Instructions

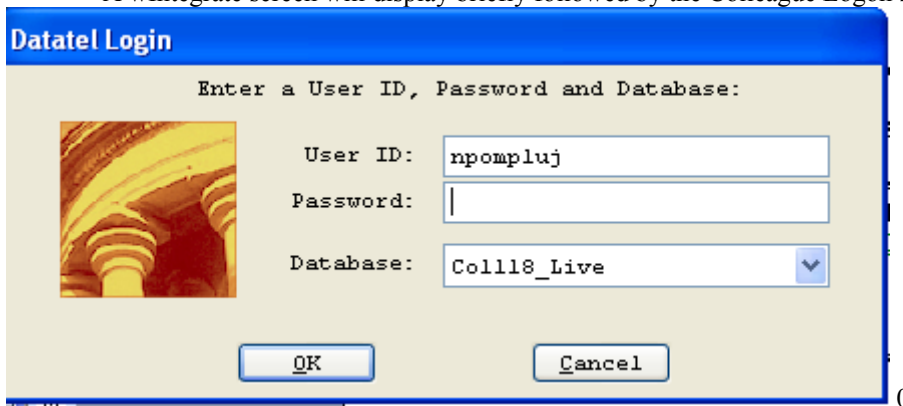
Responsibility: University

Colleague Access

### Accessing Colleague from Windows

- Select the **START** button on the taskbar.
- Select **PROGRAMS** from the start menu.
- Select **DATATEL** from the **PROGRAMS** options.
- Select **UI Desktop** from the **DATATEL** options.  
or
- Select the desktop **Datatel** icon.

A wIntegrate screen will display briefly followed by the Colleague Logon screen as shown below.



### Logging On/Off & Changing Password

- Enter your Colleague ID in lower case letters at the login prompt and press enter.
- Enter the password at the password prompt. See the Rules for Password section of the document for changing passwords.

If either the login ID or login password is entered incorrectly, the login prompt will re-display. After 3 unsuccessful tries, the login ID will be locked and must be reset. Send an email to **your university system administrator**.

**Select Coll18\_Live for the Production Account or Coll18\_Test for the Test Account.**

Click on OK.

# South Dakota Colleague System Procedures

## Change Password

- Select the **START** button on the taskbar.
- Select **PROGRAMS** from the start menu.
- Select **DATATEL** from the **PROGRAMS** options.
- Select **DATATEL Terminal** from the **COMMUNICATIONS** options.  
or
- Select the desktop **Datatel Terminal** icon.

The following screen will be displayed for the change of password.

<p>Main Menu</p> <ol style="list-style-type: none"><li>1. Live Account</li><li>2. Change Password</li><li>3. Log Off</li></ol> <p>Enter your selection[1-10]: 2</p> <p>Changing password for "userid" userid's Old password: userid's New password: Enter the new password again:</p>
---

- Enter userid's old password
- Enter userid's new password
- Re-enter userid's new password

A message will display confirming that the password has been changed.

# South Dakota Colleague System Procedures

## Rules for passwords are:

- a) The password must be a minimum of six characters long.
- b) The password must contain two characters and two numbers.
- c) The password must have two alpha/numeric characters not in the previous password.
- d) The password can not have more than two repeating characters.
- e) The password only recognizes the first eight characters, but a password can contain 256 characters.
- f) Passwords can not contain these characters: ( ) \* ? < > / ; & ! [ ] { } | \$ \ ' " )
- g) The password is case sensitive.

## Password Change Requirements

- a) Users will be required to change password every 20 weeks. After the 18<sup>th</sup> week, users will be notified that their password will need to be changed soon. They will then have those two weeks plus an additional two weeks grace period to make that change. Total time lapse for a password is 20 weeks.
- b) The account will be locked if no change is made to a password after the grace period. To reset the account, send an email to **your university system administrator**.
- c) When a user is requested to change password upon login to Colleague, they **MUST** do so. Failure to comply will result in being locked out of the system after the fifth try. However, while trying to change password, the user is given several tries to meet the password criteria until they are successful. If the user gets locked out, send an email to **your university system administrator** to have the ID reset.
- d) When a user receives the message to change their password, they will have 60 seconds to begin typing before they are disconnected – but not locked out.
- e) Passwords cannot be reused immediately. There is a 26-week wait period before a password can be recycled. Even then, the password cannot have been used within the last two iterations.

If you are successful logging in, you will get the message screen with the “PRESS ENTER TO CONTINUE” message at the bottom. A small ‘loading’ message will flash on the screen before you get the ‘Datatel – Colleague’ screen.



# South Dakota Colleague System Procedures

## Options on the very top row:



To start a new session, click on **File**, then **New Session**, then **Current Account** to stay in the same account (Live or Test) or **New Account** to open a session in the opposite account.

To change the application, click on **Apps**, check the application wanted: ST is the student application and most users will not need to use another application.

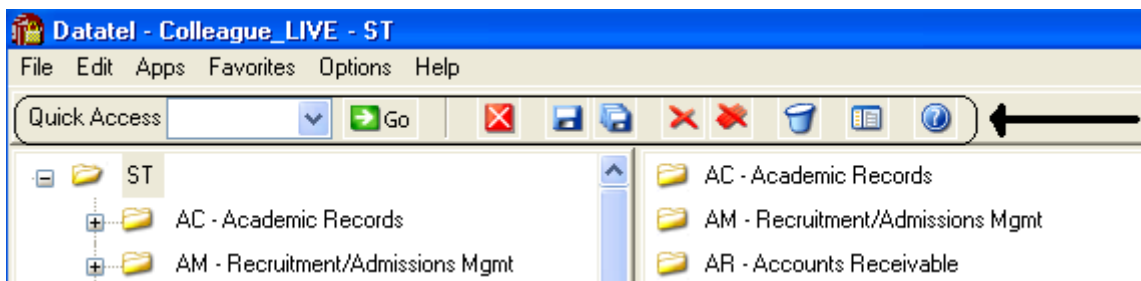
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

To change the font or colors on your screens/reports, click on **Options**, then **Font** or **Change Colors**.

To be able to scroll back to see output on the screen from paragraphs run from a user menu (to see list of menus, click on NCCR, then XNSU), click on **Options**, then **Show UI Console**. A Datatel UI Console window will appear on the screen. Enter the menu name on the Datatel-Colleague main screen. Answers to the prompts can be entered on Datatel – Colleague main screen or in the Send to Host box at the bottom of the Show UI Console window. To view output on the screen, use the scroll up or down buttons at the right on the Show UI Console window.

# South Dakota Colleague System Procedures

## Options on the Second Row:



If you know the name of the screen you want to access, type in the mnemonic in the **Quick Access** box and click **Go**. The drop down box in the Quick Access box will contain the mnemonics you have used previously.

If you are updating records and have not detailed to another screen, click on the **Single Disk** (or pressing F10) to update the current screen and retain the same screen to select a new record. If you have detailed to another screen, click on the **Single Disk** (press F10) to update the current screen and return to the screen from which you detailed. If you have detailed down to additional screens and wish to update all the fields that you have changed on all the screens and return to the menu, click on the **Multiple Disks**.

If you have looked at a screen without detailing down and do not want to make any updates but want to look at other records on the same screen, click on the **Red Diagonal with a Single Cross Diagonal** (or pressing F8). If you have detailed down and you do not wish to update the fields on the current screen (and any screens you detailed from to get to the current screen) and return to the menu, click on the **Red Diagonal with a Multiple Cross Diagonals**. **Warning:** If you click the Red multiple Cross Diagonals, none of the changes you made on any screen you detailed from will be saved.

**Wastebasket** (Shift-F10) is for deleting entire records. Clicking on the **Menu** when on a screen turns on (off) the menu display on left side of screen. To see the Field Help for the field where the cursor is, click the **Blue Circle with a ? (F1)** inside.

## Menu



To expand the menu on the left side of the screen to see submenu(s), click on the Plus sign (+). To remove submenus, click the Minus sign (-).

To access a screen without typing the mnemonic, click on a screen name that does not have a plus (+) or a minus (-) in front.

# South Dakota Colleague System Procedures

To see a list of screens that you have added to **Favorites** (see above), expand the Favorites Menu by clicking on the Plus sign in front of Favorites. This will enable you to display a customized menu of screen names.

## **Detail Screens**

Screen mnemonics display at the top of left hand corner. To move to a new field, use the mouse to point and click on the new field.

Multiple value fields will have a box with a number at the left of the data.

A box with bright colors to the right of the data indicate that you can drill down to a detail screen by clicking on the box or by pressing F2. Do not drill down from a Comment screen. If, however, you drill down from a Comment screen, you will be taken to an editor. To return to the Comment screen, enter 'fi' at the bottom.

The names of the screens that you have drilled through will display at the top. You can look at one of those screens by clicking on it; however, you will not be able to update it unless you cancel (clicking on the single red X box in the 2<sup>nd</sup> top row or pressing F2) or finish out (clicking on single black X box in the 2<sup>nd</sup> top row or pressing F9) of the screens that you detailed to.

Fields with a box at the right with a 'V' have Validation Codes associated with the field. To see a list of valid codes, click on the box. To select a value, click on the item in the list.

If you enter 3 dots (...) in a field that has table values associated, the table will be displayed. To select a value, type in the number associated with the list and press enter OR check the box (or boxes to populate multiple values in a multiple valued field) to the left of the number and click on the disk at the bottom of the screen.

Fields with 2 small rectangles with an up arrow in the top rectangle and a down arrow in the bottom rectangle allow you to scroll through the fields by clicking on the up or down arrow. Right click on the up or down arrow for a drop down box allowing you to select from a list of options.

Fields with a box with a calendar are date fields. You can select a date from a calendar by clicking of the box and clicking on a day on the calendar. When the calendar is displayed, you can change the month by clicking the single 'less than (<)' or 'greater than (>)' symbol; to change the year, click the double less than (<<) or greater than (>>) symbols.

To copy the value in a field highlight the field, press Ctrl C; to paste that value in another field, highlight the new field and press Ctrl V. Alternatively, highlight value to copy, click Edit, click Copy, highlight the new field, click Edit, click Paste.

## **Date and Time Stamp**

Put the cursor is in the Comment field, click on Edit, then click on Date/Time/Login Stamp

# South Dakota Colleague System Procedures

## To view a report

Output from processes (ie EVAL) or reports on UTFB will be displayed in a report browser. To scroll through the current page, use the scroll bar at the right side. To go to a new page, press the Left or Right Arrow (Page Down, Page UP). The rightmost Printer is used to print to a printer that has been defined to Colleague.

## Function keys

**F1 → Field Help** provides on-line short help specific to the field in which the cursor is positioned.

**F1 Enter → Field Help** provides a longer on-line, detailed help messages specific to the field in which the cursor is positioned

**Shift F1 → Process HELP** gives an overview of a process, explaining its basic function and its relation to other processes

**F2 → DETAIL** moves to different screens and is used when there is box to the right of the screen indicating that drill down screen(s) are available.

**Shift F2 → Funct HELP (Fkey HELP)** displays the layout of function key assignments for keyboard.

**Shift F8 → Direct Acc** cancels the updates made on the screen and returns to the previous screen

**F9 → FINISH** saves new data entered and takes you back to the previous screen or menu

**Shift F9 →FINISH** same as F9

## QUICK TIPS

- ✧ To display the last person, term, section, etc.. displayed use @ on the command line.
- ✧ To display a list of table values when the cursor is on the command line type "...".
- ✧ Always Cancel from a screen you are not updating. Caution: Changes made on a drill down screen will not be saved when you cancel from the current screen.

# South Dakota Colleague System Procedures

## Search Procedures

Student searches may be completed in several ways:

- Student Social Security Number
- Student Colleague ID
- Exact Student Name
- Student Name by Sound

### Student Social Security Number Search

- ◆ To begin a record search, first use the social security number if available. Check the name and birth date to confirm a match of the record for which you are searching.

### Student Colleague ID Search

- ◆ Colleague ID, a 7 digit unique ID assigned by Colleague, can also be used for a person search. Again, check the name and birth date to confirm a match of the record for which you are searching

### Name Search

Name searches will display a resolution screen listing all people meeting the name search criteria. Select the desired record by using the sequence number.

#### **Exact Name Search**

A name search can be done in three ways: “First Name” (space) “Last Name”; “Last Name”, “First Name”; or “Last Name” only. It is also permissible to use only part of the first or last name for a broader name search. \*\* You must use a minimum of three characters when doing a partial name search.

When searching for a name with spaces, use the underscore key “\_” to identify the position(s) in the name where the spaces are located. Example: Terrance Van Den Hemmel would be searched for by entering “Terrence Van\_Den\_Hemmel” or “Van\_Den\_Hemmel, Terrance”.

When searching for a name with an apostrophe or a hyphen, leave the apostrophe or the hyphen in the name search. Example: Bruce O’Neil would be searched for by entering “Bruce O’Neil” or “O’Neil, Bruce”, Marge Wilson-Hart would be searched for by entering “Marge Wilson-Hart” or “Wilson-Hart, Marge”. The name search will also find Marge by using either part of her hyphenated last name. Example: “Wilson, Marge” or “Hart, Marge”.

#### Phonetic Name Search

If social security number search and name search (full and partial) fail to yield a result, use the soundex option. This option will search for a last name by “the way it sounds”. At the lookup prompt, type in “/” before typing in the phonetic spelling of the last name. This does a broad search by the sound of the last name, but it is not as reliable as the other search options.

# South Dakota Colleague System Procedures

The name search will search records based on the “Name LFM” and “Other LFM” fields. The name search will not search records based on the “Pref Name” or “Mail Name” fields. All possible record matches are displayed on the “person resolution” screen by preferred name.

When a list of possible records is found on the “person resolution” screen, check the social security number, birth date, entry date, and address to confirm a match of the record for which you are searching.

## Other Searches

### **Course or Section Search**

Enter XXXX-000-00

Where: XXXX is the prefix for the course (i.e.: BIOL)

000 is the course number (i.e: 101)

00 is the section number with the university identifier(i.e.:x 01)

Example: BIOL-101-D01

If the section number is not provided, a resolution screen will be displayed for the selection of the correct section.

### **Term Search**

Enter YYYYTT (i.e.: 1998FA)

Where: YYYY is the year in which the term actually occurs (i.e.: 1998)

TT is the term

(i.e. FA = Fall , SP = Spring, SU = Summer)

### **Restricted lookup by Topic Code**

- At the resolution screen, enter S to select sections by Topic Code (or another value on the section)
- At the SSELECT COURSE.SECTIONS BY @ID: prompt, enter the selection criteria
  - For example, WITH SEC.TOPIC.CODE EQ 'USDSU' will bring back the sections only offered at SDPURC

### **Restricted lookup for open sections**

Search for open sections by entering S at the section resolution screen from RGN, then type WITH SEC.AVAIL.STATUS EQ 'Open' and return.

# South Dakota Colleague System Procedures

## Record Search Overview

Responsibility: University

## LookUp Selection Options

The LookUp Processor gives you full query-language selection capabilities along with full data field and record security. Many of the selection options available with LookUp are similar to using database management query language and retrieval. See your system administrator if you need assistance using any of these options.

You may enter one of the following at the LookUp prompt:

- \* the actual ID
- \* [**@**] to display the last record filed
- \* [...] to view all IDs you may access
- \* [ABC...] to select all IDs that begin with ABC
- \* [...ABC] to select all IDs that end with ABC
- \* [...ABC...] to select all IDs that contain the characters ABC
- \* [ABC...XYZ] to select all IDs that begin with ABC and end with XYZ
- \* [;] to display all available dictionary elements for this file
- \* [;]dictname to 1) Select all IDs with a value for this dictionary element or 2) If dictname is an indexed field, to display a resolution screen showing all the values indexed for this dictname. For example, you might enter ";SCHOOLS.DEPTS" at the Schools LookUp prompt to find all the schools in your institution associated with one or more departments.
- \* [;]dictname datavalue to select all IDs with a value like the datavalue for this dictionary element. For example, you might enter ";SCHOOLS.DEPTS MATH" at the Schools LookUp prompt to find all the schools in your institution associated with the math department.
- \* [;]dictname operand datavalue to select all IDs whose value of dictname matches the operand and datavalue(s). A datavalue may be any string containing alphanumeric characters or ellipsis (...). For example, you might enter ";SCHOOLS.DEPTS NE MATH" at the Schools LookUp prompt to find all the schools in your institution not associated with the math department.

Valid operands are:

- \* [=] or [EQ] (Equal)
- \* [<>] or [NE] (NOT Equal)
- \* [>] or [GT] (Greater Than)
- \* [>=] or [GE] (Greater or Equal)
- \* [<] or [LT] (Less Than)
- \* [<=] or [LE] (Less or Equal)
- \* [MATCHES]
- \* [LIKE]
- \* [UNLIKE]

## Record Lookup

There are various types of records created in Colleague. Person or Organization records, records for courses and course sections, academic credentials, positions, benefits, general ledger accounts, and purchase orders are just a few of the types of records created throughout Colleague. Generally speaking, once these records are created, information pertaining to them can be changed or deleted but the actual person or organization record will always remain. For example if you create a course record for ENGL-1234, once saved, you can change the credits, academic level, title, CIP codes, etc., but you can't change the name to ENGL-2345. Similarly, if you create a person record for Bob Smith and save the record you

# South Dakota Colleague System Procedures

can later change his address, phone number, birth date or even his social security number but you can't delete Bob Smith's record. The following are steps, or procedures, for searching records:

## Person/Organization Lookup

The person/organization record is the more difficult record to find since you are relying on two variables. First is that the person providing the information was honest in presenting the demographic facts and secondly that the data entry person was accurate in entering in data. On occasion, you will find that people provide incorrect information or even falsify data. This is commonly seen when people can't quite remember their social security number so they provide one that is close. Secondly, data entry staff are only human so honest mistakes do occur when they try to read scribbled handwriting on a form. Regardless of how inaccurate data got into the system, front-end staff must carefully check for those eventualities before adding new records.

The following step-by-step process is for looking up records as well as an explanation of the reason for the process:

1. **Enter first two letters of first name and first three letters of the last name** - (You can also enter Smi, J and Colleague uses the comma to designate last, first). Although this option will bring more records than spelling the entire name out, it helps locate records with incorrect or slightly different spellings. If you chose to enter the entire name you would certainly get a smaller group of records to look through but you also have a greater chance of missing duplicates.

### IF YOU HAVE NO MATCH:

2. **Enter the Social Security Number** - Although you may not see the need to use this option after a name lookup does not pull a match, some students may have been using the wrong number or you may find a conflict with the number. Since the social security number is a unique identifier, we want to ensure that we have the correct number associated with that person.

### IF YOU HAVE A NAME WITH UNUSUAL SPELLINGS:

3. **Try a Soundex lookup**- in some situations you may encounter names that have several common spellings or that you have difficulty in determining proper spelling. By using a Soundex lookup you will find occurrences that don't match the spelling but sound like the name you are searching for. To look a name up using Soundex, at the Person Look Up type: /erdlika, ray (actual name searching for is: Hrdlicka, Raymond).

Use the data elements on the resolution screen to verify that the right person is selected. Also check to see if two records look similar. Remember that the system will allow entry of the same person twice (except for the social security number). If the birth date and the address are the same, it may indicate that there is a duplicate. If the record is truly a duplicate, follow the procedure in the final section of this document to consolidate the record into one.

### \*\* POINTS TO REMEMBER \*\*

- 1) If the person whose name is being entered goes by another name or a nickname, that person's name may not be found unless the other name has been entered on NAE as an "Other Name" or a nickname has been entered on the BIO (Biographic Information) screen. It is really a judgment call when entering a person's name and deciding whether or not that name is the person's legal or other name. However, the Human Resources/Payroll office will have the legal names of employees.



# South Dakota Colleague System Procedures

EXAMPLE: The end-user has an application to enter and they are using the APPN screen. The name on the application is Jimmy Stern. James Stern was entered previously as a prospect on the XPRS screen. The end-user enters Jimmy Stern at the Person Lookup and the record is not found. They also do a partial name lookup of Ji St and the record is not found. Using the first initial of “J” would have found the name James Stern.

EXAMPLE: Buck Stern was entered on the XPRS screen as that is the name he had put on a Prospect card from a High School Fair. His application is now in the Admissions office with James R. Stern entered on the application. James R. Stern would not be found in a Person Lookup as Buck Stern had been entered as a prospect. An alternate lookup would be to type the last name “Stern” only.

2) The “Preferred Name” field is a default from the entry in the “Last”, “First”, “Middle” field at the top of the NAE screen. If one name only is entered in the “Preferred Name” field then LookUp for that person would be the first name only. For example: Rachel Briggs goes by “Sammy” Briggs. Sammy only is entered in the “Preferred Name” field. A data entry person goes to look up Sammy Briggs and that name is not found.

**RECOMMENDATION:** Leave the “Preferred Name” as it appears after entry in the Last, First, Middle fields and enter the other name in the “Nickname” field on the Biographic Information (BIO) screen. *This screen can be accessed by detailing on the Last, First, Middle name field on NAE.*

## Other Records Lookup

Since there are fewer opportunities for spelling errors and the format for naming is usually very structured, other record lookups tend to be more straightforward. However just as with person records, it is important to follow consistent steps when searching before adding records. Following is a step-by-step process for looking up records:

1. **Enter a partial lookup** - Once again this option will bring back additional records that will require you to look through more resolution items but it helps ensure that the record you wish to enter doesn't exist in a similar form. On some lookup screens you may be required to enter complete pieces such as with courses (on CRSE you need to enter the full subject name ie., ENGL).
2. **Use (...) as a wild card lookup** – Looking for a group of records that fit a specific criteria can be done by using ... For example, looking up a GL number with the numbers “1150” in the middle you can type ...1150... at the lookup prompt. Only those numbers with 1150 will appear on the resolution screen. This applies as well by typing ... at the beginning or at the end of the lookup. For example, in searching for positions that end in ADJ you would type ...ADJ or searching for all departments that begin like EN you would type EN...

## Individual and Corporation Record Relationship

**\*\*CAUTION\*\***

# South Dakota Colleague System Procedures

In Colleague, the system maintains a **unique distinction for individuals and corporations**. When you enter a person on NAE, APPN, FCTY or FACL, the system creates a record in the PERSON file. Likewise, when an organization is created on ORGP, a record is created in the CORP.FOUNDS file. The concern arises when lookups are done on a screen earmarked for the other (calling up University of Sioux Falls on NAE or Mary Smith on ORGP). Colleague gives you a message similar to the one below. If you save out the screen, the record will be moved to the other 'domain'. In other words, an organization record could be converted to a PERSON record or a PERSON record could be converted to a CORP.FOUNDS record.

If you have update access to the screen and receive a 'Warning! This record will be marked as a person if updated' message, you must:

- Click OK to release the warning message.
- Cancel out of the screen without making any changes by clicking on the single or triple X, clicking on File and Cancel or using Shift -> F8 and hit Enter.
- If you want to access the record, go to ORGP (corporations) or NAE (individuals).

If you accidentally make the change you can return the record to the correct domain by calling up the record on the appropriate screen.

# South Dakota Colleague System Procedures

## **Flagging records on a resolution screen**

For ease in data entry, Colleague allows you to flag either all records on a resolution screen or certain records on a resolution screen. To flag certain records, enter F on the resolution screen, then enter the number of the item you wish to flag. To flag all records, enter F ALL on the resolution screen. Notice all records have an asterisk next to them. You can do a sort/select option before the F ALL to narrow the resolution screen down.

# South Dakota Colleague System Procedures

## Using a savedlist to process large numbers of records

- At the person lookup prompt, enter @SELECT
- The Primary Selection Criteria (PSC) screen is displayed
  - Enter the savelist list name
- Update to process the records
  - Enter @@ or \$ at the LookUp prompt to retrieve/view the first selected record, etc
- To deactivate your list, enter @SELECT at the LookUp prompt
  - Save or clear the list

# South Dakota Colleague System Procedures

## Updating Core Fields During ISIR Import

Responsibility: RIS

Note: this screen is maintained in the combined account.

When you import ISIR information, you can allow the ISIR Import (ISIM) process to automatically update the Core system's PERSON file with imported data. Use the Core Import Options (CIMO) form to set parameters for automatically updating the Core System.

You must set up the parameters on this form before you run the ISIR Import (ISIM) process for any year. The ISIM process uses Social Security Numbers to match incoming records to students who already exist in your Colleague database. If it finds a matching student, the process can update some of the student's information in the Core System's PERSON file as governed by the Import Options fields on this form. If it does not find a matching student, the process can optionally create a new PERSON record for the student, and update all available fields regardless of what entries you have made to the Import Options field on the form.

As of 12/28/06 this is how SD has CIMO setup:

```
-----
12/28/06 11:49                                CORE IMPORT OPTIONS                                CIMO
-----
 1 Create PERSON records during import: No
 2 * Duplicate Match Criteria.....: ISIM.PERSON
  Fields          Import Options          Match          Country Codes
 3 Name.....: 1 - Never Update CORE      No          17 Canada.: CA
 4 Birthdate.....: 2 - Update if CORE is nul Yes          18 Mexico.: MX
 5 Gender.....: 2 - Update if CORE is nul          19 USA.....:
 6 Driver's License: 2 - Update if CORE is nul          20 Foreign:
 7 Email.....: 3 - Update if ISIR not nu
 8 Address.....: 1 - Never Update CORE
 9 Phone.....: 1 - Never Update CORE

10 Address Type for ISIR.....: HOM Permanent Home
11 Address Hierarchy for ISIR: FA.CIMO
12 Phone Type for ISIR.....: HOM Permanent Hom
13 Email Type for ISIR.....: ISR ISIR
14 Alien Type for ISIR.....: Y Alien
15 Alien Delete Type for ISIR: N U.S. Citizen
16 Origin Code for ISIR.....:
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
```

Any changes to this screen need to be approved prior to changing.

### Import Options

Each of the fields on the Core Import Options (CIMO) form represent an import option. Each field is covered in this section.

#### “Create PERSON records during import”

Use this field to indicate whether you want the ISIR Import (ISIM) process to create PERSON records when it imports a FAFSA Application record for a student who is not currently in your Colleague database.

# South Dakota Colleague System Procedures

If you enter “Yes” in this field, the Address Type for ISIR field is required. The ISIM process uses Social Security Numbers to attempt to match incoming records to students who already exist in your Colleague database. If no matching student is found, Colleague checks this parameter and does one of the following:

- ⓪ If you set this flag to “Yes,” and the Department of Education (ED) has verified the student’s name, SSN, and date of birth (the SSN Match equals 4), Colleague creates the new PERSON record and populates it with information from the ISIR.
- ⓪ If you set this flag to “Yes,” and the Department has not verified the student’s identification information (SSN Match does not equal 4),

**ALERT! You must enter the ISIM.PERSON record in the Duplicate Match Criteria field before running the ISIM process even if you do not want additional fields to be compared before creating a new PERSON record. Entering the ISIM.PERSON record in the Duplicate Match Criteria field sets up the default. If you try to run the ISIM process without at least the default set up, Colleague displays an error message.**

**Note:** This field was removed from the ISIM form and placed here instead. You must complete the CIMO form, including this field, before you can run another ISIR import for any award year.

Colleague places the imported record in the UNCONVERTED.RECORDS file and does not create a new PERSON record.

- ⓪ If you set this flag to “No,” Colleague places the imported record in the UNCONVERTED.RECORDS file and does not create a new PERSON record.

Use the Batch Proc Unconverted Recs (BPUR) or the Process Unconverted Records (PUCR) forms to process records that the ISIM process moved to the UNCONVERTED.RECORDS file.

## Duplicate Match Criteria

Use the Duplicate Match Criteria field on the Core Import Options (CIMO) form to detail to the Duplicate Match Criteria (DUPC) form. Use the DUPC form to assign weights and penalties to duplicate checking fields. For more information, see online help, “Preventing Duplicate PERSON Records”, or *Using ELF*.

## The Fields Group

This group of fields governs the way Colleague updates specific types of information in the student’s PERSON record in cases where the ISIR Import (ISIM) process is able to match the imported record with a student in your database.

For each type of information you can select one of the following options:

- ⓪ **1 – Never Update CORE.** The import process does not update this field in the PERSON file. If you determine that the ISIR data is correct, you can use the Application Demographics (FAAD) form to update the PERSON file as needed.

**Note:** When adding a new PERSON record, the import process updates all available fields even if your entries in the Fields group are set to “Never Update Core.” The Fields group controls only cases where the import process is attempting to update an existing PERSON record.

**ALERT! You must enter the ISIM.PERSON record in the new Duplicate Match Criteria field before running the ISIM process even if you do not want additional fields to be compared before creating a new PERSON record. Entering the ISIM.PERSON record in the Duplicate Match Criteria field sets up the default. If you try to run the ISIM process without at least the default set up, Colleague displays an error message.**

# South Dakota Colleague System Procedures

①○ **2 – Update if CORE is null.** If the PERSON file contains any information in this field, Colleague retains that information. However, if the field is null in the PERSON file, Colleague populates the field with data from the ISIR.

①○ **3 – Update if ISIR not null.** If the ISIR contains any data in this field, Colleague updates the PERSON file with this information. However, if this field is null on the ISIR, Colleague retains whatever information is in the PERSON file rather than deleting the value of that field in Core.

①○ **4 – Always Update CORE.** The import process automatically overwrites the data in the PERSON file with information from the ISIR. If you determine that the previous Core data was correct, you must use the appropriate Core forms to update the information manually, and then run the Correction Application Export (CAPX) form to send the correction to the Department. Note that some of these fields control more than one piece of data—for example, the Name field covers the last name, first name, and middle initial. Similarly, the Driver’s License field controls both the license number and the state of issuance.

Because the Name and Birthdate fields are used for identification purposes, you can add an extra layer of security to those items. If you set the associated Match field to “Yes,” Colleague performs an update action only if the student’s identification information has been verified by the Department of Education (the SSN Match equals 4). If you set the import option to “1 – Never Update CORE,” then the Match field doesn’t matter.

## Address Type for ISIR

If you choose to update Core address information during the ISIM import process then this is the address type that is be used. This field defines the address type to be assigned to addresses being imported on ISIR records when updating Core.

Datatel recommends the address type you choose in this field be the first type listed in the address hierarchy you choose in the Address Hierarchy for ISIR field. For example, if you choose HOME in your Address Type for ISIR field, the address hierarchy you enter in the Address Hierarchy for ISIR field needs to list HOME first.

**Note:** This field is required if you entered “Yes” in the “Create PERSON record during import” field.

## Address Hierarchy for ISIR

The export (Initial Application Export IAPX and Correction Application Export CAPX) processes use this Name/Address Hierarchy to determine the address to be sent to CPS.

The FAFSA App Demographic Update (FADU) form uses this hierarchy to determine which address type from Core to show on the form. If you update the address information on FADU that address type is updated.

If you do not update Core via ISIM imports and you do not use the FADU form to update ISIR data into Core, then this hierarchy is only used to determine the address used in the export (IAPX and CAPX) processes.

If you do not update Core via the ISIM process, but you do update Core data from the FADU form, this hierarchy is used to update Core and to determine the address used in the export processes.

# South Dakota Colleague System Procedures

If you do update Core via the ISIM process and you update Core data from the FADU form, this hierarchy is used to import the ISIR data into Core, update the ISIR data into Core and also to determine the address used in the export processes.

The process is much simpler if you have a name/address hierarchy that contains only one address type. ISIM would then update that address type into Core and then if that address changes in Core a correction would be sent to CPS. If that address type did not change in Core then no address correction would be sent to CPS. The address hierarchy you choose should have the address type you've chosen in the Address Type for ISIR field listed first. The address type "Preferred" is used none of the address types in the address hierarchy are available.

## **Phone Type for ISIR**

If you update phone number to Core during the ISIM import process, or via the FADU demographic update form, Colleague updates the phone type listed in this field.

## **Email Type for ISIR**

If you set the Email field in the Fields group to one of the import options that allows the ISIR Import (ISIM) process to update the PERSON file (options 2, 3, or 4), then you must select an e-mail type to associate with the imported address. If you set the Email field to "1 – Never Update CORE," then leave this field blank.

You can enter any e-mail type listed in the PERSON.EMAIL.TYPES valcode table. You might consider creating a new e-mail type specifically for addresses imported via the ISIM process. The Initial Application Export (IAPX) and Correction Application Export (CAPX) processes use this e-mail type to determine if there is an e-mail address to be sent or corrected.

The FAFSA App Demographic Update (FADU) form uses this e-mail type to determine whether or not to copy the EDE e-mail address into CORE. If this field is left blank, you are not able to copy the EDE e-mail address into CORE.

## **Alien Type for ISIR**

Select the Alien Type code to be assigned whenever the ISIR Import (ISIM) process or the FAFSA App Demographic Update (FADU) form updates the student's alien registration number in the PERSON file. The alien type you enter here is saved to the FOREIGN.PERSON file for each student.

If you do not want the ISIM process to automatically update the alien registration number, leave this field blank. You will then have to maintain the student's registration number manually on the Foreign Person (FPER) form.

## **Alien Delete Type for ISIR**

Enter the Alien Type code that you want Colleague to assign whenever an alien registration number for a student is deleted via the ISIR Import (ISIM) process or the FAFSA App Demographic Update (FADU) form. This field updates the FPER.ALIEN.STATUS field in the FOREIGN.PERSON file. The ISIM process updates the field only if an ALIEN.ID existed for this student in the PERSON file prior to running the process.

## **Origin Code for ISIR**



# South Dakota Colleague System Procedures

Optionally select an origin code, which the ISIR Import (ISIM) process can assign to a newly created PERSON record. If you leave this field blank, the import process creates the PERSON record, but does not populate the origin field. This field is used only if the “Create PERSON records during import” field is set to “Yes.” If the import process assigns an origin code, it also assigns an origin date to the record.

## **The Country Codes Group**

Use the fields in the Country Codes group to maintain the codes used to denote countries of origin of your applicants.

### ***Canada***

This field tells the system which Country code you are using for Canada. It is used in ISIR processing.

### ***Mexico***

This field tells the system which Country code you are using for Mexico. It is used in ISIR processing.

### ***US***

This field tells the system which Country code you are using for the United States. It is used in ISIR processing.

### ***Foreign***

This field tells the system which Country code you are using for Foreign Country. It is used in ISIR processing.

# South Dakota Colleague System Procedures

## Preventing Duplicate PERSON Records

Responsibility: RIS

The Core Import Options (CIMO) form now provides the ability to check against more fields before importing an ISIR record or creating a new PERSON record. This new functionality helps to prevent incoming transactions being attached to the wrong student. The ISIM import still checks incoming records for Social Security Numbers (SSNs) that already exist in the Colleague database to determine the ID to use for importing the ISIR data.

You can use the new Duplicate Match Criteria field on the CIMO form to increase the number of fields Colleague compares before creating a new PERSON record. To do so, use the Duplicate Match Criteria field on the CIMO form to detail to the Duplicate Match Criteria (DUPC) form. The DUPC form is displayed with fields from the ISIR.DEMO file that would be logical comparison fields to determine if the information being imported already exists in the PERSON file. Colleague is delivered with the DUPC form populated with a record for this validation process. The default set up of this record provides SSN checking only. Using the DUPC form, you can modify this record by assign weights and penalties to fields your institution wants to use for validation. The ISIM import uses the data you set up on the DUPC form for comparing incoming data to existing data during import.

If you want to increase your checking to prevent duplicate PERSON records, you must assign a weight or penalty to a field listed on the DUPC form. For more detailed information on the DUPC form, see the online help and *Using ELF*.

**ALERT! The information from the DUPC form is assigned to your session when you first log in. Changes made to the DUPC form do not take affect until after you completely exit your session and log back in. Please note that exiting to the colon prompt isn't enough – you must exit all the way out and log back in for the changes to take affect.**

# South Dakota Colleague System Procedures

## Overview of Steps for Setting Up Student Budgets

Responsibility:

Timeframe:

Below is an overview of the steps to set up student budgets at your institution. A reference to a detailed procedure is provided for each of these summary steps.

1. Read about rule-based budgets on Colleague. See the following: “Understanding Student Budgets— Cost of Attendance”. “Understanding Budget Components” “Understanding Enrollment Duration” “Understanding Budget Assignment Rules” “Calculating Student Budgets— Cost of Attendance” “Maintaining Student Budgets”
2. Read about the Student System rule processor. See *Getting Started with Colleague Student*.
3. Define your budget components using the Student Budget Component (SBCD) form. See “Defining Budget Components” and the “Student Budget Components (SBCD)” worksheet.
4. Create rules to assign student budgets and list the budget components to be assigned when the rule is true.
  - Create rules to assign your budget components to students. Enter the rule table ID on the Budget Rule Definition (SBRD) form. Enter the rules on the Rules Definition (RLDE) form.
  - For each rule table ID you enter on SBRD, list the budget components to be assigned when the rule is true on the Student Budget Component List (SBCS) form. See “Defining Budget Assignment Rules” and the following worksheets:
    - “Budget Component Assignment Rules—English Statements”
    - “Student Budget Component Assignment Rules (SBRD, RLDE)”
    - “Budget Component List to Assign When Rule is True (SBCS)”
5. Set up budget enrollment duration.
  - Create rules to specify a source of enrollment data on the Budget Duration Rule (BDRL) form.
  - Identify credit hours for full-, threequarter-, half-, and less than half time statuses for financial aid programs on the Full Part Time Definition (FPD) form and create rules on the Full/Part Time Rules (FPRL) form to assign those statuses to students. See “Defining Budget Enrollment Duration” and the following worksheets:
    - “Rules for Source of Budget Duration Data—English Statements”
    - “Rules for Source of Budget Duration Data (BDRL, RLDE)”
    - “Full/Part Time Definition (FPD)”
    - “Full/Part Rules—English Statements”
    - “Full/Part Rules (FPRL, RLDE)”
6. Define budget system parameters on the FA System Parameters (FASP) form.
  - Set Budget Rebuild Option Default. See *Getting Started with Colleague Student*.

# South Dakota Colleague System Procedures

## Defining Budget Components

Responsibility:

Timeframe:

Complete the steps below to define your budget components:

**Step 1** - Identify how many different student classifications your institution uses for the purposes of financial aid budgeting.

- See “Understanding Student Budgets—Cost of Attendance” on page 3-3.

**Step 2** - Make a copy of and complete the “Student Budget Components (SBCD)” worksheet on to define your budget components on paper.

- Using the worksheet to define your components enables you to delegate the tasks associated with mapping out the costs and unit types of various budget components.

**Step 3** - Access the SBCD form.

- The Budget Component Definition (SBCD) form is displayed with the cursor at the Enter the Academic Year prompt.

**Step 4** - Enter the academic year for which you are defining your budget components.

- The year you entered is displayed in the header in the Year field and the cursor moves to the first Code field.

**Step 5** - Enter a unique budget component code.

**Step 6** - Enter a description of this component code.

- Because this description displays on award letters, you may want to use a shortened description that applies to several codes (for example, “Full-time Tuition”) and fully describe the code in the Characteristics field.

**Step 7** - Fully describe the characteristics of this component code.

- Because this field does not appear on the award letters, you can make this description sufficiently detailed to identify the component in the list of components assigned to a student.

**Step 8** - Enter a campus-based unit type in the CB Unit Type field.

Valid options are:

- YR (per year)
- TR (per term)
- MO (per month)
- CR (per credit hour)
- NF (number in family)

Colleague uses the unit type code you enter here, along with the cost amount entered in the CB–Unit Cost field, to determine the total cost associated with this component for defining a student budget for campus-based awarding.

**Step 9** - Enter the campus-based unit cost for this component in the CB Unit Cost field.

# South Dakota Colleague System Procedures

- Colleague uses the unit cost, along with the unit type code entered in the CB–Unit Type field, to determine the total cost associated with this component for defining a student budget for campus-based awarding.

**Step 10** - Enter an Inst unit type in the Inst Unit Type field.

Valid options are:

- YR (per year)
- TR (per term)
- MO (per month)
- CR (per credit hour)
- NF (number in family)

Colleague uses the unit type code, along with the cost amount entered in the Inst–Unit Cost field, to determine the total cost associated with this component for defining a student budget for institutional awarding.

**Step 11** - Enter the Inst unit cost for this component in the Inst Unit Cost field.

- Colleague uses the unit cost, along with the unit type code entered in the Inst–Unit Type field, to determine the total cost associated with this component for defining a student budget for institutional awarding.

**Step 12** - Enter the nine-month cost associated with this component for defining the Pell budget. No unit type field is associated with the Pell cost because the Pell budget is for a standard nine-month financial aid awarding year.

**Step 13** - To include this component in less than half time Pell calculations, enter **Y**; otherwise, enter **N**.

- Entering “Y” in this field will enable the budget component to be considered whenever a Pell calculation is performed for a less than half time cost of attendance situation. Entering “N” or leaving this field blank will cause the budget component to be excluded from the Pell calculation whenever a less than half time cost of attendance situation occurs.

**Step 14** - To include this component in alternate Pell calculations, enter **Y**; otherwise, enter **N**.

- Entering “Y” in this field will include this budget component when calculating the Alternate Pell Entitlement amount. This is used to identify the tuition, dependent care, and disability expense budget components.

**Step 15** - Are you finished defining your budget components?

**Yes.** Continue with Step 16 -

**No.** Repeat Step 5 through Step 15 of this procedure.

**Step 16** - Save your work on this form.

**Note:** The component being included for less than half time Pell should reflect a student’s full-time annual amount.

**Note:** If you want to enter components for *another* academic year, save your work on this form. The Enter Academic Year prompt is displayed. Enter the next academic year for which you want to define budget components. Repeat this procedure beginning with Step 5 -

# South Dakota Colleague System Procedures

## Defining Budget Assignment Rules

Responsibility:

Timeframe:

Complete the steps below to define your budget assignment rules.

**Step 1** - Map out your rules in English-like statements.

- Use the “Budget Component Assignment Rules—English Statements” worksheet.

**Step 2** - Identify the data elements you need to construct the rules.

- Work with your system administrator to identify these data elements.

**Step 3** - Map out your rules using rule-based processor syntax.

- Use the “Student Budget Component Assignment Rules (SBRD, RLDE)” worksheet.

**Step 4** - Define the budget components to be assigned when each rule is true.

- Use the “Budget Component List to Assign When Rule is True (SBCS)” worksheet.

**Step 5** - Access the SBRD form for the appropriate award year.

- If no rules exist for the year you enter, Colleague prompts you to copy a record from an existing year. If you enter **Y**, you are prompted to enter a year from which to copy existing rules.

**Step 6** - If you want to use the rule-based processor to define your budget rules, continue with Step 7 -

- If you want to use a custom subroutine to define your budget assignment rules, go to the Custom Subroutine field.

**Note:** The data elements you use must be from the CS.ACYR file (where ACYR represents the four-digit academic year), or one of the subsidiary files associated with it. See *Getting Started with Colleague Student* for more information about the rule processor.

Continue with Step 14 -

**Step 7** - Enter the ID of a budget assignment rule from “Student Budget Component Assignment Rules (SBRD, RLDE)” worksheet.

- The Record not found—Enter (A)dd or RETURN to Reenter prompt is displayed.
- If the rule displays on the SBRD form and the cursor moves to the Budget Code field, continue with Step 12 -

**Step 8** - Enter **A**.

- The Rules Definition (RLDE) form is displayed.

**Step 9** - Complete the top half of the RLDE form for the rule.

- At a minimum, enter a description, office code, and primary view.

**Step 10** - Enter the rule.

- Use the information from the “Budget Component Assignment Rules— English Statements” worksheet.
- Refer to *Getting Started with Colleague Student* for information about the RLDE form.

# South Dakota Colleague System Procedures

**Step 11** - Save the rule.

- The SBRD form is redisplayed with the cursor in the Budget Code field.

**Step 12** - Enter the budget code or codes for Colleague to assign if this rule is true from the “Budget Component List to Assign When Rule is True (SBCS)” worksheet.

- To assign more than one budget component when this rule is true, detail to the Student Budget Component List (SBCS) form.
- To assign a single budget component code when this rule is true, enter the code in this field.
- When you use the SBCS form to enter more than one budget component code, an X is displayed in the Budget Code field on the SBRD form and the number of codes that you entered on the SBCS form is displayed in the Component Count field.

**Step 13** - Repeat this procedure, beginning with Step 7, for each rule table ID you have defined on the worksheet. Continue with Step 15 -

**Step 14** - Enter in the Student Budget Subroutine field the name of the custom subroutine you want Colleague to call instead of using budget rules for assigning budget components.

**Step 15** - Save your work on the SBRD form.

# South Dakota Colleague System Procedures

## Summary Steps for Setting Up Budget Enrollment

### Duration

Responsibility:

Timeframe:

Follow the steps below to set up budget enrollment duration at your institution. Each step provides a reference to more detailed information.

1. Write rules to indicate whether Colleague should use FAFSA intended enrollment or a standard enrollment duration that you specify for groups of students in calculating enrollment duration for permonth components.

BDRL,  
RLDE

"Indicating a Source for Enrollment Duration Data" "Rules for Source of Budget Duration Data—English Statements" worksheet "Rules for Source of Budget Duration Data (BDRL, RLDE)" worksheet

2. Set the duration of the award period in months.

BDRL

"Follow the steps below to set up budget enrollment duration at your institution. Each step provides a reference to more detailed information."

3. For per credit hour unit types, define credit hours for full- and part-time enrollment for each financial aid program at your institution. Create rules to assign enrollment statuses (F/P IDs) to students.

FPD  
FPRL,  
RLDE

See "Creating Full/Part-Time Enrollment Definitions" "Full/Part Time Definition (FPD)" worksheet "Full/Part Rules—English Statements" worksheet



# South Dakota Colleague System Procedures

## Indicating a Source for Enrollment Duration Data

Responsibility:

Timeframe:

Complete the following steps to indicate whether, for groups of students that you specify, Colleague should use the students' intended enrollment as reported on the FAFSA or use a standard enrollment you specify on the Budget Duration Rule (BDRL) form to calculate the students' budget duration for per month budget components.

**Note:** You can override the enrollment duration you indicate here for a group of students during batch budget assignment using the Batch Budget Assignment (SBGT) form, and for individual students on the Budget Calculation Parameters (BCP) form.

1. Make a copy of and complete the following worksheets to use rules to divide your student population into groups with similar budgets and to specify a source of enrollment duration data for each group:

- "Rules for Source of Budget Duration Data—English Statements"
- "Rules for Source of Budget Duration Data (BDRL, RLDE)"

Using the worksheets enables you to delegate the tasks associated with grouping students and developing rules.

2. Enter the information from the "Rules for Source of Budget Duration Data (BDRL, RLDE)" worksheet on the BDRL and RLDE forms.

Create the rule table ID for the student group using the Rules Definition (RLDE) form, and then enter the rule table ID and the source (FAFSA enrollment or your entry in the Budget Duration field) on the BDRL form.

3. Save your work on the BDRL form.

# South Dakota Colleague System Procedures

## Mapping FAFSA Intended Enrollment

Responsibility:

Timeframe:

Complete the following steps to map your Colleague award periods to the terms listed on the FASFA.

**Step 1** - Access the Budget Duration Rule (BDRL) form.

**Step 2** - Enter the duration of the Colleague award period, in months. For example, if your fall award period is four months, enter **4**.

**Step 3** - Repeat Step 2 for each FAFSA term for which you want to define a corresponding Colleague award period.

- You determine which of the award periods offered by your institution you want included in the budget duration calculation.
- Some institutions choose to prepare preliminary budgets only for the fall and spring terms, even though they offer additional terms.

**Step 4** - Leave blank the fields for FAFSA terms for which you do not want to map corresponding Colleague award period.

- Save your work on the BDRL form.

# South Dakota Colleague System Procedures

## Creating Full/Part-Time Enrollment Definitions

Responsibility:

Timeframe:

Follow the steps below to define full/part-time enrollment statuses (F/P IDs) for your financial aid programs and to develop rules to assign the F/P IDs to students.

**Step 1** - Make a copy of and complete the “Full/Part Time Definition (FPD)” worksheet.

- Define an F/P ID for each financial aid program at your institution.
- See “Creating Full/Part-Time Enrollment Definitions”.

**Step 2** - Access the Full Part Time Definition (FPD) form for the appropriate award year.

**Step 3** - Enter the data from the “Full/Part Time Definition (FPD)” worksheet on the Full Part Definition (FPD) form to create F/P ID’s for your financial aid programs.

**Step 4** - Save your work on the FPD form.

**Step 5** - Make a copy of and complete the “Full/Part Rules—English Statements” worksheet on page B-9 and the “Full/Part Rules (FPRL, RLDE)” worksheet to create rules similar to your student attendance pattern rules to assign credit hours, based on F/P IDs, to students. See “Creating Full/Part-Time Enrollment Definitions”.

**Step 6** - Access the Full/Part Time Rules (FPRL) form for the appropriate award year.

**Step 7** - Enter your full/part rules and F/P IDs in the Student Rules field on the FPRL form. Define the rule table ID on the RLDE form and enter the rule table ID in the appropriate window on the FPRL form.

**Step 8** - Save your work on the FPRL form.

# South Dakota Colleague System Procedures

## **Copying Budget Components to a New Award Year**

Responsibility:

Timeframe:

Use the Batch Budget Component Copy (SBCC) form to copy the budget components defined for one year to another year. You can use the SBCC form only if the new year does not have any budget components defined for it. To use the budget components from an existing year as the basis for a new year, first complete the SBCC form and then add any new components as needed. Be sure to copy the components to the new year before you attempt to change any dollar values.

# South Dakota Colleague System Procedures

## **Copying Budget Assignment Rules to a New Award Year**

Responsibility:

Timeframe:

The Budget Rule Definition (SBRD) form enables you to copy budget assignment rules from an existing year to a new year. When you access the SBRD form for an award year for which no budget assignment rules exist, the SBRD prompts you to copy a new record and prompts you for the source year to use for the copy. When you save or finish your work on the SBRD form, the copied rules are saved for the new year.

# South Dakota Colleague System Procedures

## **Verifying Budget Assignment Rules and Components**

Responsibility:

Timeframe:

Use the reports listed in “Reports for Troubleshooting Budget Set Up” on page 3-48 to verify that your newly created budget components and budget assignment rules function together as you intend.

# South Dakota Colleague System Procedures

## Procedure for Copying Budget Components and Assignment Rules to a New Award Year

Responsibility:

Timeframe:

Follow the steps below to copy budget components from an existing year to a new year.

**Step 1** - Ensure that no budget components have been defined for the new year.

- Access the Budget Component Definition (SBCD) form for the new year to ensure no budget components have been defined.

**Step 2** - Access the Batch Budget Component Copy (SBCC) form.

**Step 3** - Enter the year from which you want to copy components in the Source Year for Copy field.

**Step 4** - Enter the new year in the Target Year for Copy field.

**Step 5** - Save your work on the SBCC form.

- The budget components from the old year are copied to the new year.

**Step 6** - Access the Budget Rule Definition (SBRD) form for the new year.

**Step 7** - At the prompt “Copy record from an existing year?” enter **Y**.

**Step 8** - At the “Enter Year to Copy From:” prompt, enter the old year. Be sure to copy rules from the same year from which you copied components. When you press return to complete the entry of the year, the rules from the old year populate the SBRD form.

**Step 9** - Modify the populated rules as necessary.

**Step 10** - Save your work on the SBRD form.

- The copied rules are saved as the budget assignment rules for the new year.

# South Dakota Colleague System Procedures

## Need Analysis Import Tasks

Responsibility: RIS/ESC

Timeframe: weekly

The steps below summarize how to import records, forms to use to complete each step, and a reference to more detailed information.

**ALERT! Before using the ISIR Import (ISIM) process for the first time, you must set up your preferences on the Core Import Options (CIMO) form. See “Setting Up ISIR Import Parameters” for more information.**

**1. Download ISIR files** Download ISIR files from your Student Aid Internet Gateway (SAIG) mailbox Department of Ed Import (DOEI) See “Importing Files From SAIG”

**2. Import Data** Import Electronic Data Exchange ISIR data

**Note:** The report produced during this process contains information about the data that was not converted. ISIR Import (ISIM) “Populating Colleague with Imported ISIRs”

**3. Report on Unconverted ISIR Data** Produce a report listing name, address and Social Security number for records in the UNCONVERTED.RECORDS file Unconverted Records Report (URR) “Reporting on Unconverted ISIR Records”

**4. Process Unconverted ISIR Records** Process Unconverted ISIR records Process Unconverted Records (PUCR) and/or Batch PRCS Unconverted Recs (BPUR) “Converting Individual ISIR Records” and/or “Batch Processing of Unconverted ISIR Records”

**5. Delete ISIR Records from the UNCONVERTED.RECORDS File** Selecting for deletion and then deleting records in the UNCONVERTED.RECORDS file Unconverted Records Purge (UNPG) “Deleting Unconverted ISIR Records”



# South Dakota Colleague System Procedures

## **Importing Files from SAIG**

Responsibility: SD does not use this.

RIS has their own procedure for retrieving ISIRs from the SAIG mailbox.

# South Dakota Colleague System Procedures

## Importing ISIR Data into Colleague

Responsibility:

Timeframe:

Before using the ISIR Import (ISIM) process, you must have import files available in the FA.RECEIVE.DIR directory file. See “Importing Files From SAIG”. Before running the ISIM process for the first time, you must set up your preferences on the Core Import Options (CIMO) form. See “Importing Files From SAIG” for information and setup instructions.

**Step 1** - Access the ISIR Import (ISIM) form.

**Step 2** - In the Academic Year field, enter the appropriate academic year.

**Step 3** - Specify your import options in the following fields:

- Other Import Types
- Save Low Trans ISIRs
- CM Code
- CM Date

See “Noteworthy Fields on the ISIM Form”, or online help, for more information about these fields.

**Step 4** - Do you want to process a **group** of import files, or a **single** import file?

**Group.** Use the following fields to select the files to import:

- Combine Input Files
- Combined File Name
- Message Class
- School Code
- Max File Size Limit

**Single.** In the Single Import File Name field, enter the name of the file to import.

**Step 5** - Do you want Colleague to create a saved list of all the student ID numbers imported by this form?

**Yes.** Enter the name of the saved list in the Output Save List field. You can use the saved list name you enter here in any form that allows for entry of a saved list of student IDs.

Because you may create many saved lists if you use the ISIM form frequently, you may want to use for the saved list the name of the file you are importing.

**No.** Leave blank the Output Save List field.

**Step 6** - Do you want Colleague to create a saved list of all the ISIR IDs imported by this form?

**Yes.** Enter the name of the saved list in the Output ISIR List field.

**No.** Leave blank the Output ISIR List field.

**Step 7** - Finish out of the ISIM form.

**Step 8** - Complete the Peripheral Defaults and Process Handler forms according to your preferences.

**Step 9** - Review the batch error report produced by the ISIM form to determine which records were placed in the UNCONVERTED.RECORDS file and the reason the record did not convert.

# South Dakota Colleague System Procedures

**Step 10** - Review the report produced by the ISIM form to determine which records were converted and to view any warning messages from the CPS.

# South Dakota Colleague System Procedures

## Reviewing Imported ISIRs

Responsibility:

Timeframe:

Use the ISIR Alert Report (IART) to view any ISIRs that require attention. This report alerts you to changes in a student's overpayment, loan default, verification selection, EFC, reject codes, comment codes, and NSLDS information.

### **Change Source**

Enter the change entity (the source that generated the new transaction) to which you want to compare the active federally flagged ISIR. The following are the valid options:

- STU – Student-initiated
- CPS – CPS-generated
- SCH – School-generated
- ALL – All Types

# South Dakota Colleague System Procedures

## Checking ISIRS (original, corrections and system gens)

**Responsibility: University**

**Timeframe: After ISIR loads**

Once you received the E-mail from ESC with dataset name (03xLABxxxx):

### **Step 1 - Run CRG and receipt in the labels (xFC03FLB) using the dataset ESC gave you.**

- This will add a label document for those students who need a label. The pending correspondence (labels) will appear on VPC. Process labels through PCB and FAFL or as you have in the past.

(Many Schools run a program to eliminate any who already have a label and then use the new dataset created when running CRG)

### **Step 2 - Run XREC using dataset ESC gave you to get a listing of all students who were moved to your local account.**

- This listing shows ISIR type codes, ready to send, file complete status, verification status, EFC, transaction number, packaging codes, PJ and Dep Override codes along with the school codes on this ISIR. Review these records for needed changes.
  - If file complete, are they now verification status (VS) of 2?
    - If so you need to delete the file complete date. For system generated, check CRI for all file complete to see if a default, overpayment or other status makes them incomplete. Check these in both local and combined – they may be Ok in local, but complete in combined.
  - Is the Ready to Send flag (RS) set?
    - If so, the COLL and EDE EFCs should not match, unless the correction done was identical to the correction pending to send out. If that is the case, remove the ready to send flag.
  - Do the EFC's match, if not you need to check if you accept the changes or want to correct the record.
  - If either PJ or Dependency Override is set, are you the campus that did it? If not you will need to review the record for needed information and/or corrections.
  - If packaged by you, has the EFC or other items (ie prior degree) changed so that your package needs to be changed?

# South Dakota Colleague System Procedures

## Using the Birthdate Variance Report (BDVR) Form

Responsibility:

Timeframe:

The Birthdate Variance Report (BDVR) allows you to compare a student's Core and federally flagged ISIR birthdates. You can run this report in three different modes:

- Display variances for verified students (“verified” refers to whether or not the federally flagged ISIR birthdate has been matched at a level 4 by the CPS on the Social Security Administration database).
- Display variances for students whose birthdates have not been verified.
- Display all variances regardless of verification.

If you enter a savedlist name in the Output Saved List Name field, a savedlist of student IDs for those students who have not been verified will be created. This savedlist can then be used to send corrections to the CPS.

**Note:** On the FA System Parameters (FASP) form, a new field, Import Birthdate Options, allows your institution to specify how to handle the student's date of birth during ISIR import in relation to the DOB on Core.

# South Dakota Colleague System Procedures

## Generating the Birthdate Variance Report (BDVR)

Responsibility:

Timeframe:

To generate the Birthdate Variance Report (BDVR), follow the steps below.

**Step 1** - Access the Birthdate Variance Report (BDVR) form.

**Step 2** - At the Academic Year field, enter the appropriate academic year.

**Step 3** - At the Variance Type field, specify the type of variance report you would like to run:

- Verified Students: Display all students whose birthdates have been verified by the CPS.
- Non-verified Students: Display all students whose birthdates have not been verified by the CPS.
- All Variances: Display all students with variances regardless of verification.

**Step 4** - At the Input Saved List Name field, you can enter the name of a saved list of student IDs to select, or in the Students field, enter names or other identifying data of students to process, or use LookUp.

**Step 5** - At the Output Saved List Name field, enter a savedlist name if you want Colleague to create a savedlist of students who have not been verified by the SSA.

**Step 6** - At the Additional Selection Criteria field, enter **Y** if you want to further narrow your selection for this process. When you finish or update from this form, the Additional Selection Criteria form is displayed, where you can enter other selection criteria or construct your own criteria using the selection connectors.

**Step 7** - Save your work on this form.

# South Dakota Colleague System Procedures

## Reporting Unconverted Records

Responsibility:

Timeframe:

Follow the steps below to produce the Unconverted Records (URR) report.

**Step 1** - Access the Unconverted Records Report (URR) form.

**Step 2** - Enter **EDE** in the Import Type field.

**Step 3** - In the Import Date Range, enter the beginning and ending import dates for the records on which you want to report.

**Step 4** - Do you want to use a saved list of student records from the UNCONVERTED.RECORDS file?

**Yes.** Enter the name of a list of IDs from the UNCONVERTED.RECORDS file in the Saved List field.

**No.** Leave blank the Saved List Name field to report on all the records in the UNCONVERTED.RECORDS file.

**Step 5** - Do you want to further narrow your selection?

**Yes.** Enter **Y** in the Additional Selection Criteria field. When you complete this form, the Additional Selection Criteria form is displayed. Enter your selection criteria on it.

**No.** Leave the Additional Selection Criteria field blank or enter **N**.

**Step 6** - Save your work on this form. The URR report is produced.

**Step 7** - Continue with "Procedure for Converting Individual ISIR Records"



# South Dakota Colleague System Procedures

## Converting Individual ISIR Records

Responsibility:

Timeframe:

Follow the steps below to convert individual ISIR records in the UNCONVERTED.RECORDS file

**Step 1** - Before converting these records you must run the Unconverted Records (URR) process to identify the records.

**Step 2** - Access the Process Unconverted Records (PUCR) form for the academic year you require. The current academic year is displayed as the default.

**Step 3** - Enter **EDE** in the Import Type field.

**Step 4** - In the Import Date Range field, enter the import date for the records on which you want to report. If you leave this field blank, Colleague enters the current date by default.

**Step 5** - Enter the Social Security Number (SSN), as recorded in the import file, of an applicant whose record was not converted by the ISIR Import (ISIM) process. If Colleague does not find the SSN in the UNCONVERTED.RECORDS file, the following message is displayed: “[SSN entered] is not in the UNCONVERTED.RECORDS file” You can then re-enter the SSN.

**Step 6** - Enter the student ID, name, or other information to access the Colleague PERSON record for the applicant whose record was not converted. Use LookUp to find the record you need. When a record is found on the PERSON file, the name, address, city, state, and zip code from the PERSON file, and the name, address, city, state, and zip code from the import record are displayed for verification, as well as the discrepancy that caused the record not to be converted in the original conversion.

**Step 7** - Enter the preferred delete action for unconverted records.

**1 – Don’t Delete.** Does not delete any records from the UNCONVERTED.RECORDS file, regardless of whether or not records are convert properly.

**2 – Delete Converted Records.** Deletes only the records from the UNCONVERTED.RECORDS file that convert properly.

**3 – Delete Low Tran/Conv Recs.** Delete those unconverted records with a low transaction number as well as those that convert properly.

**Step 8** - Do you want to update the Communications Management (CC) module?

**Yes.** Enter the appropriate communication code in the CM Code field and today’s date in the CM Date field.

**No.** Leave blank the CM Code and CM Date fields.

**Step 9** - Update your work on this form. The record is converted.

**Step 10** - Repeat Step 5 through Step 9 for each record you want to convert.

# South Dakota Colleague System Procedures

**Step 11** - If you chose not to complete Step 7 on page 4-33 and you want to delete records from the UNCONVERTED.RECORDS file, continue with “Deleting Unconverted ISIR Records”

# South Dakota Colleague System Procedures

## Batch Processing of Unconverted Records

Responsibility:

Timeframe:

Follow the steps below to batch process unconverted ISIR records.

**Step 1** - Before you begin this procedure you should run the Unconverted Records (URR) Report.

**Step 2** - Access the Batch Prcs Unconverted Recs (BPUR) form. The current academic year is displayed as the default.

**Step 3** - Enter the import type for the records to be processed.

**Step 4** - Enter a beginning and ending date range of import dates.

**Step 5** - Enter the preferred delete action for unconverted records. This field determines whether or not UNCONVERTED.RECORDS will be deleted during the process.

**1 – Don't Delete.** Does not delete any records from the UNCONVERTED.RECORDS file, regardless of whether or not records are convert properly.

**2 – Delete Converted Records.** Deletes only the records from the UNCONVERTED.RECORDS file that convert properly.

**3 – Delete Low Tran/Conv Recs.** Deletes those unconverted records with a low transaction number as well as those that convert properly.

**Step 6** - Do you want to update the Communications Management (CC) module?

**Yes.** Enter the appropriate communication code in the Communication Code field and today's date in the Communication Date field.

**No.** Leave blank the Communication Code and Communication Date fields.

**Step 7** - If you want to define a saved list name for capturing a list of all IDs converted, enter the name in the Output Save List field.

**Step 8** - Finish your work on this form. The records are converted.

# South Dakota Colleague System Procedures

## Deleting Unconverted Records

Responsibility:

Timeframe:

Follow the steps below to delete records in the UNCONVERTED.RECORDS file.

**Step 1** - Before you perform this procedure, make sure you have converted all records that you want to convert.

**Step 2** - Access the Unconverted Records Purge (UNPG) form.

**Step 3** - Enter the two-digit academic year of the records you want to delete. Colleague compares the two-digit year you enter here to the first part of the record ID in the UNCONVERTED.RECORDS file and restricts your selection to the records that match.

**Step 4** - Enter **EDE** in the Import Type(s) field.

**Step 5** - Enter the import date(s) for the records you want to delete in the Import Date field.

**Step 6** - Do you want to run the report in simulation mode, to produce a report of the records selected for deletion without actually deleting them?

**Yes.** Enter **Y** in the Simulation field Colleague generates an Unconverted Records Purge report that lists the record IDs and the Social Security numbers, if any, of the records that meet your selection criteria. The records are not deleted from the UNCONVERTED.RECORDS file.

**ALERT! If you leave all the fields blank, the entire file is purged.**

**No.** If you have already run the report in simulation mode and you are ready to delete records in the UNCONVERTED.RECORDS file, enter **N** in the Simulation field. The selected records are deleted when you save your work on this form.

**Step 7** - Save your work on this form. The selected records are deleted from the file.

# South Dakota Colleague System Procedures

## The Need Analysis Summary (NASU) Form

Responsibility:

Timeframe:

Use the Need Analysis Summary (NASU) form as the starting point for processing all of your Need Analysis application data. You can do the following from the NASU form:

- ①○ View all imported ISIRs.
- ①○ Run calculations.
- ①○ Manage an applicant's budget.
- ①○ Set the student's Location.
- ①○ View NSLDS History information.
- ①○ View Transfer Monitoring Errors.
- ①○ Maintain Core Demographics.
- ①○ Access the FA Student Comments (STCM) form.
- ①○ Work with the student's budget.

The NASU form displays both original ISIR and correction information (if any is available). ISIR information is displayed in the top row and correction information is displayed in the second row of each record.

From the NASU form, you can detail to the Application Workflow Choices (NAWC) form to do the following Original Correction:

- ①○ Make corrections to ISIRs.
- ①○ Create and modify Supplemental applications.
- ①○ Create and modify CSS PROFILE applications.
- ①○ Create initial FASFA applications.
- ①○ Access demographic information.
- ①○ Perform verification processing.
- ①○ Run calculations.

# South Dakota Colleague System Procedures

## **The Application Workflow Choices (NAWC) Form**

Responsibility:

Timeframe:

Use the Application Workflow Choices (NAWC) form to access additional ISIR functions. You can only access the NAWC form by detailing from the Type field on the Needs Analysis Summary (NASU) form. The information that you view on only applies to the specific transaction you detail from.

# South Dakota Colleague System Procedures

## **Creating a Supplemental Application From Federally Flagged ISIRs**

Responsibility:

Timeframe:

Use the Batch Create Supplemental Rec (BCSR) form to create a need analysis Supplemental application from the Federally flagged ISIR on the student's record. A need analysis calculation is automatically provided when the new Supplemental application is created. Only students with a Federally flagged ISIR on file are processed.

The newly created Supplemental ISIR records are flagged as I (Institutional) record in the Active field on the Need Analysis Summary (NASU) form. After running the BCSR process, the Federally flagged ISIRs are no longer marked B (Both Institutional and Federal) in the Active field on the NASU form. They are marked F (Federal) in the Active field. You can use a saved list of student IDs from the CS.ACYR file or you can enter individual student IDs.

The batch process also creates an output report which lists the students with newly created Supplemental ISIR records and the Federal and Institutional Estimated Family Contribution (EFC) for each student. The Federal EFC is only an estimate – it is not the official EFC.

**ALERT! Datatel strongly suggests that you avoid running the BCSR process wide open. Doing so creates a Supplemental record for every federally flagged ISIR in Colleague.**

# South Dakota Colleague System Procedures

## Comparing to the Federally Flagged ISIR Transaction

Responsibility:

Timeframe:

Colleague provides the ability to compare an ISIR transaction with the current federally flagged ISIR transaction. To access this functionality, detail on the ISIR transaction you want to compare to the federally flagged ISIR transaction on the Need Analysis Summary (NASU) form.

Colleague displays the Applications Workflow Choices (NAWC) form. The Compare Selected ISIR to Fed Flagged field on the NAWC form provides this functionality. When you detail on the Selected Current ISIR to Fed Flagged field, the ISIR Differences (UTEL) form is displayed. The UTEL form displays the following:

- ①○ Each field name with contents which differ from the contents of the other ISIR transaction.
- ①○ The Fed flagged ISIR value of each listed field name.
- ①○ The selected ISIR value of each listed field name. Fields that have the same value on both ISIRs are not displayed on the UTEL form.

To ensure you compare the most up-to-date information, Colleague compares any existing correction data for the selected record or the federally flagged ISIR.

You can compare almost any record to the federally flagged ISIR, including Supplemental applications. There are two exceptions. If you detail to the NAWC form through the current federally flagged ISIR, there's no need to compare it to itself. If you detail to the NAWC form through a PROF type, the Compare Current ISIR to Fed Flagged field is also unavailable. The PROFILE application is significantly different enough from a federally flagged ISIR transaction to make a meaningful comparison. See *Using Financial Aid: CSS PROFILE Processing* for more information on PROF types and PROFILE applications.



# South Dakota Colleague System Procedures

## **Viewing/Maintaining General Application Information**

Responsibility:

Timeframe:

Use the Financial Aid Status Info (FASI) form to view and maintain general need analysis application information. Financial Aid staff can use the FASI form either before or after an award calculation to help answer questions they may have about a student's application status.

### **Student FA Demographic Data (SD06) Form**

Use the Student FA Demographic Data (SD06) form to maintain personal data about the student. The data on this form is designed to follow the flow of the paper FAFSA application.

### **Student FA Interests (SI06) Form**

Use the Student FA Interests (SI06) form to maintain information about the student's educational background. The data on this form is designed to follow the flow of the paper FAFSA application.

### **Student FA Financial Data (SF06) Form**

Use the Student FA Financial Data (SF06) form to maintain financial information about the student. The data on this form is designed to follow the flow of the paper FAFSA application.

### **Dependency Status Questions (DS06) Form**

Use the Dependency Status Questions (DS06) form to maintain personal information about the student as well as information about the student's dependents. The data on this form is designed to follow the flow of the paper FAFSA application.

### **Parent FA Demographic Data (PI06) Form**

Use the Parent FA Demographic Data (PI06) form to maintain financial information about the student's parents. Complete this form only if you answered "No" to all of the Yes/No questions on the Dependency Status Questions (DS06) form. The data on this form is designed to follow the flow of the paper FAFSA application.

### **Parent FA Financial Data (PF06) Form**

Use the Parent FA Financial Data (PF06) form to maintain financial information about the student's parents. Complete this form only if you answered "No" to all of the Yes/No questions on the Dependency Status Questions (DS06) form. The data on this form is designed to follow the flow of the paper FAFSA application.

### **Releases/Signatures for FAFSA (RS06) Form**

Use the Releases/Signatures for FAFSA (RS06) form to maintain information about the release of student data to colleges and state agencies, and about the signatures on the FAFSA. The data on this form is designed to follow the flow of the paper FAFSA application. The school codes are maintainable for initial applications.

# South Dakota Colleague System Procedures

## **Supplemental Calc Student Data (SCSD) Form**

Use the Supplemental Calc Student Data (SCSD) form to record additional income and asset information, such as medical expenses, home value and expected income for the next award year that is not recorded on the FAFSA.

The data on the SCSD form is used by Colleague to determine the supplemental family contribution. The Colleague Supplemental Calculation is based on the Federal Methodology and can be used for non-federal awarding. This data is not exported as part of the electronic application. This form is only available by detailing on a Supplemental (SUPP) type on the NASU form.

The Federal Methodology uses the data from the FAFSA and additional income and asset information, such as medical expenses, home value and expected income for the next award year that is collected on this form. The Colleague Supplemental Calculation uses the same dependency, simple need edits, and complete assumptions as the Colleague calculation based on the Federal Methodology (FM) as well as a set of assumptions dealing with the following fields on SCSD:

- ①○ Student and Parent Medical/Dental Expenses
- ①○ Tuition Paid
- ①○ Home Value Debt

You may modify calculation defaults as needed on the Supplemental Calc Parameters (SCPM) form.

# South Dakota Colleague System Procedures

## Accessing the NSLDS Forms

Responsibility:

Timeframe:

You can access the NSLDS forms through the NSLDS Aggregate Information (NAGI) form, which can be accessed directly through the menu, through the Need Analysis Summary (NASU) form, or through the Application Workflow Choices (NAWC) form.

When you access the NAGI form from the menu, Colleague displays a Person LookUp prompt. Information from the federally flagged transaction is displayed.

To access the NSLDS forms from the NASU form, detail on the transaction you are interested in, then on the NSLDS History field on the NAWC form. To access the NSLDS forms via the NAWC form, use the following procedure.

**Step 1** - Access the Need Analysis Summary (NASU) form.

**Step 2** - Detail on the transaction you are interested in to access the Application Workflow Choices (NAWC) form.

**Step 3** - Detail on the View NSLDS Information field on the NAWC form to access the NSLDS Aggregate Information (NAGI) form.

**Step 4** - Detail on the Detail Loan/Pell Info field to access the NSLDS Loan/Pell Info (NLPI) form.

**Step 5** - Detail on the School field to access the NSLDS Loan Detail Info (NLDI) form.

# South Dakota Colleague System Procedures

## **NSLDS Aggregate Information (NAGI) Form**

Responsibility:

Timeframe:

Use the NSLDS Aggregate Information (NAGI) form to view a summary of the financial aid loan history provided by NSLDS. Colleague populates NSLDS fields when you use the ISIR Import (ISIM) process to import ISIR data and through the Transfer Monitoring Import (TMIM) process.

The NAGI form displays transaction numbers and flags that indicate whether a student is in overpayment, default, discharge, repayment, or bankruptcy. In addition, the NSLDS Post Screen Reason Code is displayed, indicating the reason a student's eligibility has changed since its initial screening. The NAGI form also displays aggregate amounts for FFELP/Direct loans and Perkins loan information. Pell payment data and FFELP/Direct loan details are available on the NSLDS Loan/Pell Information (NLPI) form.

# South Dakota Colleague System Procedures

## **NSLDS Loan/Pell Info (NLPI) Form**

Responsibility:

Timeframe:

Use the NSLDS Loan/Pell Info (NLPI) form to view Pell payment data provided by the NSLDS. Colleague populates NSLDS fields when you use the ISIR Import (ISIM) process to import ISIR data and when you use the Transfer Monitoring Import (TMIM) process to import Transfer Monitoring data.

# South Dakota Colleague System Procedures

## **NSLDS Loan Detail Info (NLDI) Form**

Responsibility:

Timeframe:

Use the NSLDS Loan Detail Info (NLDI) form to view detailed NSLDS information about an individual loan.

# South Dakota Colleague System Procedures

## **NSLDS Information Summary (NLIS) Form**

Responsibility:

Timeframe:

Use the NSLDS Loan Information Summary (NLIS) form to view summary information about all NSLDS records imported into Colleague. You can detail on any NSLDS transaction to see more details about a record.

You can access the NLIS form directly from the menu, or by detailing on the NSLDS History field on the Need Analysis Summary (NASU) form.

# South Dakota Colleague System Procedures

## Viewing General CPS Information

Responsibility:

Timeframe:

Use the CPS General Information (CPSI) form to view general CPS information on student's ISIR. The CPSI form displays match information and flags imported from the ISIR import process.

### Accessing the CPSI Form

There are two ways to access the CPSI form.

- You can access the CPSI form from the menu. If you access the CPSI form from the menu, the form displays information on the federally flagged transaction.
- If you access the CPSI form from the Needs Analysis Summary (NASU) form, the form displays information on the transaction you detailed on. The transaction must be either an ISIR or CPSSG type.
- You can also access the Need Analysis Summary (NASU) form, detail on the transaction you are interested in to access the Application Workflow Choices (NAWC) form, and then access the CPSI form by detailing on the View General CPS Information field.



# South Dakota Colleague System Procedures

## Overriding Reject Codes

Responsibility:

Timeframe:

Use the CPS Overrides/Comment Codes (CPSR) form to view and override various reject codes associated with a student's ISIR. You can also view CPS Comment Codes and Assumptions from the CPSR form. Detail on individual Comment Code fields to access descriptions of comment codes associated with the transaction. Detail on the Assumptions field to access the CPS Assumptions (CPSA) form.

If you access the CPSR form from the menu, it displays the federally flagged transaction. If you access the CPSR form from the Needs Analysis Summary (NASU) form, the CPSR form displays the transaction you detailed from. The transaction must be an ISIR or CPSSG type. If you override a reject or assumption code, enter **Y** in the Ready to Send field to send a correction record.

### Reject Codes on the CPSR Form

The CPSR form displays the following Reject Codes.

Table 5-16 lists the reject codes and tells you how to resolve the problems.

- Rej A - Date of birth year is 1900 through 1928. Verify or correct the birthdate on NAE. If the birthdate is correct, set override Reject A flag to **Y** on CPSR.
- Rej B - Independent status in question because of student's age. Correct birthdate on NAE, change the Orphan/ Ward field to **Y** (if appropriate), or set the override Reject B flag to **Y** on CPSR.
- Rej C - Taxes paid greater than or equal to 40% of AGI. If the student is dependent, verify or change the parents' income and tax information on PI##. If the student is independent, verify or change the student's income and tax information on SI##.
  - D Student's SSN match, but no name match. Verify or change the student's first and last name.
  - E Father's SSN match, but no name match. Verify or change the father's first and last name.
  - F Mother's SSN match, but no name match. Verify or change the mother's first and last name.
- Rej G - Student taxes paid greater than or equal to 40% of AGI. Verify or change the student's income and tax information on SI##.
  - J Father's SSN contains all zeros and reported as tax filer. Verify or change the father's SSN.
  - K Mother's SSN contains all zeros and reported as tax filer. Verify or change the mother's SSN.
  - N Missing first or last name. Correct the student's last or first name or verify a blank first or last name if the student only has one name.
  - P Invalid SSN range. Verify or correct the student's current SSN.
  - R Student's Social Security Match, but no date of birth match. Verify or change the student's date of birth.
  - S Father's Social Security Match, but no date of birth match. Verify or change the father's date of birth.
  - T Mother's Social Security Match, but no date of birth match. Verify or change the mother's date of birth.
- Rej W - Number of family members appears high. If the student is dependent, verify or change the parent's number in household in the left-hand column on PI##. If the student is independent, verify or change the student's number in household in the lower righthand corner of PI##. If the number of family members is correct, set the override reject W flag to **Y** on CPSR.
- Rej N - First or last name is blank. Correct name on NAE. If the student has only one name, put an override reject N flag on CPSR.

# South Dakota Colleague System Procedures

- 1 The simplified needs test is not met and all asset data is blank.
  - If the student is dependent, provide the following:
    - Parent's Cash, Savings, and Checking
    - Parent's Real Estate/Investment Net Worth
    - Parent's Business/Investment Farm Net Worth
  - If the student is independent, provide the following:
    - Student's Cash, Savings, and Checking
    - Student's Real Estate/Investment Net Worth
    - Student's Business/Investment Farm Net Worth
- 2 Incomplete Application or Renewal Application.
  - Rej 2 - Dependent student requires parent income.
  - or
  - Rej 2 - Independent student requires student income. Enter parents' income on PI## on right side of form under Parent Finances (cont'd) in the twelve fields listed there.
  - or
  - Enter student income on SI## on right side under Student Finances (cont'd) in the first eight fields.
- 3 Student's Taxes Paid is greater than zero and equal to or greater than AGI. Correct student's Taxes Paid or AGI.
- 5 Missing or invalid date of birth.
  - Rej 5 - Missing birthdate
  - Rej 5 - Birthdate is future date
  - Rej 5 - Birthdate is before 1850 Correct birthdate on NAE.
- 6 Father's Social Security Number was not matched with the Social Security Administration. Correct the SSN, name, and/or Date of Birth for mother and/or father to achieve a full match for at least one parent.
- 7 Mother's Social Security Number was not matched with the Social Security Administration. Correct the SSN, name, and/or Date of Birth for mother and/or father to achieve a full match for at least one parent.
- 8 SSN match with Date of Death Contact the Social Security Administration to fix the error at SSA. Then reenter name or Date of Birth and submit as a correction for an updated SSA match.
- 9 Student is dependent, but parents' identification fields are not complete. Dependent, Father's and Mother's SSN, Last or First name blank. Enter the parents' last names, Social Security Numbers, and/or dates of birth on PI##. At least one parent must have all three fields populated.
- 10 Missing marital status and household size.
  - Rej 10 - Verify Parents' Marital Status and Household Size. (This occurs when Parents' marital status is null and parents' number in family is less than 2.)
  - or
  - Rej 10 - Student's marital status and number in family are blank. If the student is dependent, review and correct the Parent Marital Status and Parent Number in Household fields on PI## If the student is independent, review and correct the Marital Status field on SD##, and the Student Number in Household field on PI##.
- 11 Unmarried student reported spouse income, or unmarried parent of dependent student reported spouse income
  - Rej 11 - Marital status inconsistent with base year income. If independent student is unmarried, delete spouse income on SI##. If dependent student's parent is unmarried, delete spouse income on PI##. Or, if appropriate, set the Professional Judgement flag to  $\times$  on CPSR.
- 12 Taxes paid equal or exceed reported Adjusted Gross Income.
  - Rej 12 - Taxes paid greater than or equal to AGI. If the student is dependent, verify or change the parents' income and tax information on PI## and the student's income and tax information on SI##. If the student is independent, verify or change the student's income and tax information on SI##.
- 13 Missing name. Rej 13 - First and Last Name are Blank. Enter at least a first or a last name on NAE.
- 14 Missing student signature on paper FAFSA or SAR. Signature correction must be made on a printed Student Aid Report (SAR) certification page and resubmitted to the FAFSA Processor or can be corrected electronically.
- 15 Missing parent signature on application or SAR.
  - Rej 15 - Not Signed by Parent. After verification of parent signature on paper FAFSA, enter  $\times$  on RS##, in the field One Parent Signed.
- 16 Missing student signature on Web application. Signature correction must be made on a printed Student Aid Report (SAR) certification page and resubmitted to the FAFSA Processor or can be corrected electronically.

# South Dakota Colleague System Procedures

17 Unknown citizenship status or student is not a U.S. citizen or eligible non-citizen.

Rej 17 - Student Citizenship is Blank.

or

Rej 17 - Student is not a U.S. Citizen/Eligible Non-Citizen. Go to SD## and enter a status in the Citizenship field. The student has a code "3" on SD## for citizenship. The record will not be exported, but may be recalculated for institutional aid.

18 SSN not on Social Security Administration's database. Correct the SSN. If the SSN is already correct, contact the Social Security Administration to fix the error in their records. Then reenter the SSN and submit as a correction for an updated SSA Match.

19 An EFC cannot be calculated because the Department of Education has placed a 'hold' on the student. The student needs to call 202-377-3243 to resolve comment 009.

N/A Parent or student is filing a tax return but has not reported any income or taxes paid. Parent (or Student) AGI and Tax Paid are blank and Tax Filed is not '3' Go to the PF## form (or SF##) and add the adjusted gross income or the income tax paid figures for the parents and/or student. Or, if appropriate, set the tax return status to 3 - Will Not File.

N/A The first position of Title IV school codes has been deleted. Can't change first school code to blank. Make sure that a school code is present in the first position of school codes on the RS## form.

N/A The user is attempting to add a school code without a student's DRN. Can't change school code without PIN. If you are attempting to add a school code, a DRN must be present on the ISCA form.

# South Dakota Colleague System Procedures

## Suppressing Assumptions

Responsibility:

Timeframe:

When performing a need analysis calculation in Colleague, you have the option to suppress certain data assumptions that Colleague would otherwise make based on federal specifications. To suppress a Colleague need analysis calculation assumption, access the CPS Assumptions (CPSA) form.

**Note:** You can suppress assumptions only for FM calculations. Assumptions cannot be suppressed for SM calculations.

# South Dakota Colleague System Procedures

## Printing ISIRs

Responsibility:

Timeframe:

**Step 1** - Access the Student Information Record (ISIR) form.

**Step 2** - Enter the year you want to report on in this field.

**Step 3** - Do you want to include FAA Comments on the printed ISIR?

**Yes.** Enter **Y** in the FAA Comments field.

**No.** Enter **N** in the FAA Comments field.

**Step 4** - Do you want to include the Signature/Certification page on the printed ISIR?

**Yes.** Enter **Y** in the Signature/Certification field.

**No.** Enter **N** in the Signature/Certification field.

**Step 5** - Enter your selection criteria in the following fields:

- Saved List
- Student IDs
- Add Date
- CPS Application Date
- CPS Transaction Date
- CPS Transaction Preference

**Step 6** - Save and exit from the ISIR form.

**Step 7** - Complete the Peripheral Defaults and Process Handler forms according to your preferences.

**Note:** The ISIR form does not function for the 2004/2005 processing year and before.

# South Dakota Colleague System Procedures

## Printing Need Analysis Worksheets in Colleague

Responsibility:

Timeframe:

Use the ISIR Worksheet (FAIW) form to print need analysis worksheets for the following transaction types:

- ISIR
- CPSSG
- CORR
- IAPP
- SUPP

The worksheet contains the information used to calculate the student's EFC.

**Note:** The FAIW process does not print PROF transaction types.

# South Dakota Colleague System Procedures

## Viewing and Maintaining Calculation Results

Responsibility:

Timeframe:

Use the Calc Result Details (CRDT) form to view and maintain your calculation results. You can use the CRDT form to change to alternate Estimated Family Contributions (EFCs).

Access the CRDT form via the Need Analysis Summary (NASU) and Application Workflow Choices (NAWC) forms. Detail on the View Calculation Results or View Correction Calculation Results fields to reach the CRDT form.

**ALERT! Make sure that your budget duration is correct before you change to an alternate EFC. Alternate EFCs are based on the budget duration.**

# South Dakota Colleague System Procedures

## **Viewing Intermediate Calculation Values**

Responsibility:

Timeframe:

Use the NA Intermediate Values (NAIV) form to view intermediate calculation results.



# South Dakota Colleague System Procedures

## **Adjusting Supplemental EFCs**

Responsibility:

Timeframe:

Adjusting Supplemental EFCs is accomplished in almost exactly the same manner as adjusting other EFCs. The difference is the ISIR type. When you access the Need Analysis Summary (NASU) form to adjust your Supplemental EFC, detail on a SUPP type transaction to maintain an existing Supplemental application and a Blank transaction to create a new Supplemental application.

Detailing on a SUPP and Blank type takes you to the Application Workflow Choices (NAWC) form, just like the other ISIR types. On the NAWC form, detail on the Create/Maintain a Supplemental Appl field. If you have detailed from a SUPP type, the Create/Maintain a Supplemental Appl field allows you to maintain your Supplemental application. If you have detailed from a Blank type, the Create/Maintain a Supplemental Appl field allows you to create a new Supplemental application.

### **SUPP Type Transaction**

Your Supplemental EFC is calculated automatically when you finish out of the last FAFSA application form. View your adjusted Supplemental EFC on the Calc Result Details (CRDT) form by detailing on your SUPP type transaction to access the NAWC form. On the NAWC form detail on the View Calculation Result or View Correction Calculation Results field to access the CRDT form. For more information on the CRDT form, see “Calculation Results”.

# South Dakota Colleague System Procedures

## Calculating EFCs for a Group of Students

Responsibility:

Timeframe:

Use the FA Batch Calc (FABC) process to perform a need analysis calculation for multiple students in batch mode. This is only needed when your institution must re-calculate all students.

**ALERT! You do not need to run batch calculations for Federal EFCs. Any time you enter new applications or make changes to existing application information, calculations are automatically run by Colleague upon exiting from application forms.**

**ALERT! Do not run the FABC process on the ACT setting unless there is a Federal specification change. Datatel will provide formal notification if this occurs.**

# South Dakota Colleague System Procedures

## Assigning Budget Components to Groups of Students

Responsibility:

Timeframe:

Follow the steps below to assign budget components to groups of students.

**Step 1** - Access the Batch Budget Assignment (SBGT) form for the appropriate award year.

**Step 2** - If you want to enter an overriding budget duration for all students you are processing in this batch, enter the overriding budget duration in months in the Budget Duration field. If you want to use the budget duration specified in the rules on the Budget Duration Rule (BDRL) form that specifies use of FAFSA intended enrollment or a duration amount that you entered on the BDRL form, leave the Budget Duration field on this form blank. This form then uses the budget duration that is a result of the rules on the BDRL form.

**Step 3** - Do you want to process this group of records in simulation mode?

**Yes.** Enter **Y** in the Simulation Mode field to produce a report rather than update student records.

**No.** Enter **N** in the Simulation Mode field to update student records.

**Step 4** - Do you want to assign budgets to only those student records with no budget already assigned?

**Yes.** Enter **Y** in the Without Budget Only field.

**No.** Enter **N** in the Without Budget Only field to assign budgets to all student records in the group.

**Step 5** - Do you want to include in the report produced by this form detail about the rules used to assign each budget component to a student?

**Yes.** Enter **Y** in the Detailed Rule Information field.

**No.** Enter **N** in the Detailed Rule Information field.

**Step 6** - If you want to include summary information about student records whose budgets are frozen and so are not updated by this form?

**Yes.** Enter **Y** in the Frozen Budgets field.

**No.** Enter **N** in the Frozen Budgets Information field.

**Step 7** - Do you want to assign budgets using a saved list of student records?

**Yes.** Enter the name of a list of IDs from the CS.ACYR file (where ACYR represents the four-digit academic year) in the Saved List field. Use the Output Saved List you created when importing records.

**No.** Leave blank the Saved List Name field to assign budgets to all the records in the CS.ACYR file (where ACYR represents the four-digit academic year).

**Step 8** - Do you want to further narrow your selection?

**Yes.** Enter **Y** in the Additional Selection Criteria field. When you complete this form, the Additional Selection Criteria form is displayed. Enter your selection criteria on it.

**No.** Leave the Additional Selection Criteria field blank or enter **N**.

# South Dakota Colleague System Procedures

**Step 9** - Save your work on this form.

**Step 10** - Review the batch error report produced by the SBT form to determine which records, if any, were not processed.

**Step 11** - Review the report produced by the SBT form to determine if the appropriate records were processed in the manner in which you intended.

# South Dakota Colleague System Procedures

## Automatically Assigning Budget Components to Individual Students

Responsibility:

Timeframe:

Follow the steps below to automatically assign budget components to a student.

**Step 1** - Access the Need Analysis Summary (NASU) form for the appropriate award year and student.

**Step 2** - Detail on the Calc Bgt field to automatically assign budget components to this student based on the rules entered on the Student Budget Rules (SBRD) form. The Budget Calculation Parameters (BCP) form is displayed.

**Step 3** - If you choose, enter overrides for the following budget duration parameters:

- Budget Number of Months
- Budget Terms
- Budget Hours

You can view and override the student's budget expenses on the Student Budget Component (SBC) form.

**Step 4** - Do you want to reassign budget components?

**Yes.** Enter **Y** in the Assign Budget Components field. If you enter **Y** all components associated with the student that are not frozen are deleted from the student's record and Colleague reevaluates your rules for budgets, reassigning components based on these rules. The default value for this field is determined by the Dflt Budget Rebuild Op field on the FA System Parameters (FASP) form.

**No.** Enter **N** in the Assign Budget Components field.

**Step 5** - Do you want to recalculate assigned budget components?

**Yes.** Enter **Y** in the Calculate Budget Expense field. When you enter **Y**, Colleague recalculates the existing set of components assigned to this student, without reevaluating the budget assignment rules to determine if the student is eligible for other components. The new calculated values are displayed on the Student Budget Components (SBC) form. Colleague does not replace any previously entered overrides. If any component was frozen before you recalculate, Colleague does not recalculate the cost of that component. If you entered **Y** in the preceding Assign Budget Component field, Colleague sets this field to **Y** and you cannot change the value in this field. In this scenario, any overrides you entered are removed unless the component is frozen. The default value for this field is determined by the Dflt Budget Rebuild Op field on the FA System Parameters (FASP) form.

**No.** Enter **N** in the Calculate Budget Expense field.

**Step 6** - Save your work on the BCP form. The NASU form is displayed.

**Step 7** - Save your work on the NASU form.

# South Dakota Colleague System Procedures

## Manually Assigning/Overriding Automatic Assignment

Responsibility:

Timeframe:

Follow the steps below to manually assign student budget components.

**Step 1** - Access the Need Analysis Summary (NASU) form for the appropriate award year and student.

**Step 2** - Access the Student Budget Component (SBC) form by detailing on the Bgt Comp field.

**Step 3** - To assign a budget component, go to a blank line and enter a code at the Component ID LookUp prompt. The information for the code that you entered is displayed.

**Step 4** - Enter any necessary overrides to the budget amounts that appear.

**Step 5** - Repeat Step 3 and Step 4 for each component you are adding. You also have the option to delete components using this form.

**Step 6** - Save your work on this form.

# South Dakota Colleague System Procedures

## **Overriding Budget Duration Specified by Rules for a Group of Students**

Responsibility:

Timeframe:

To override for a group of students the budget duration specified by rules on the BDRL form, complete “Procedure for Assigning Budget Components to Groups of Students”, entering in Step 2 the overriding budget duration.

# South Dakota Colleague System Procedures

## Overriding Budget Duration Parameters for an Individual Student

Responsibility:

Timeframe:

Use the Budget Calculation Parameters (BCP) form to override budget duration for an individual student.

### Recalculating Assigned Budget Components for a Group of Students

**Note:** If your office frequently recalculates or reassigns student budgets, be aware that any manual overrides you make to individual student budget data are overwritten unless you freeze the individual budget component or the student's entire budget. For more about freezing components and budgets, see "Freezing Student Budgets/ Budget Components".

Follow the steps below to override budget duration parameters for an individual student.

**Step 1** - Access the Need Analysis Summary (NASU) form for the appropriate award year and student.

**Step 2** - Access the Budget Calculation Parameters (BCP) form by detailing on the Calc Bgt field.

**Step 3** - Enter any overrides you require in the Budget No of Months, Budget Terms, Budget Hours fields.

**Step 4** - Do you want to reassign budget components using the overrides you specified in Step 3?

**Yes.** Enter **Y** in the Assign Budget Components field. As a result of this entry, a **Y** is automatically entered in the Calculate Budget Expense field.

**No.** Enter **N** in the Assign Budget Components field.

**Step 5** - Do you want to recalculate the budget expense for the assigned components without reassigning components?

**Yes.** Enter **Y** in the Calculate Budget Expense field and **N** in the Assign Budget Components field.

**No.** Enter **N** in the Calculate Budget Expense field.

**Step 6** - Save your work on this form. You can view and override the calculated budget expenses on the Student Budget Component (SBC) form.

Follow the steps below to recalculate assigned budget components for a group of students.

**Step 1** - Ensure that the appropriate budget components have been updated using the Budget Component Definition (SBCD) form.

**Step 2** - Access the Budget Component Recalc (BCCR) form for the appropriate award year.



# South Dakota Colleague System Procedures

**Step 3** - If you want to recalculate assigned budget components from an existing saved list of student IDs, enter the name of the saved list at the List Name LookUp prompt for the Input Saved List Name field. If you leave this field and the subsequent field blank, Colleague changes amount for the components you enter in Step 5 and recalculates the budget for all students to whom the component has been assigned.

**Step 4** - If you want to recalculate assigned budget components using individual student IDs, enter the individual student IDs at the Student LookUp prompt in the Students field. The student's name is displayed with the ID so that you can verify that you have entered the correct ID.

- If you leave this field and the previous field blank, Colleague changes amount for the components you enter in Step 5 and recalculates the budget for all students to whom the component has been assigned.

**Step 5** - Enter the code for the budget components that you want to recalculate at the Component Code LookUp prompt.

- If you leave the Input Saved List Name field and the Students field blank, Colleague changes amount for the components you enter in this step and recalculates the budget for all students to whom the component has been assigned.

**Step 6** - Do you want to further narrow your selection?

**Yes.** Enter **Y** in the Additional Selection Criteria field. When you complete this form, the Additional Selection Criteria form is displayed. Enter your selection criteria on it.

**No.** Leave the Additional Selection Criteria field blank or enter **N**.

**Step 7** - Save your work on this form.

Use the Student Budget Components (SBC) form to view and override the newly calculated budget expenses.

## **Recalculating Budget Expense for an Individual Student**

Follow the steps below to recalculate budget expense for an individual student.

**Step 1** - Access the Budget Calculation Parameters (BCP) form for the appropriate award year and student. Your cursor is displayed in the Budget No of Months Override field.

**Step 2** - Enter **N** in the Assign Budget Components field. You must enter **N** in the Assign Budget Components field to prevent budget components from being reassigned rather than recalculated.

**Step 3** - Enter **Y** in the Calculate Budget Expense field.

**Step 4** - Save your work on this form. Use the Student Budget Components (SBC) form to view and override the newly calculated budget expenses.

**Note:** If your office frequently recalculates or reassigns student budgets, be aware that any manual overrides you make to individual student budget data are overwritten unless you freeze the individual budget component or the student's entire budget. For more about freezing components and budgets, see "Freezing Student Budgets/ Budget Components".

# South Dakota Colleague System Procedures

## Freezing/Unfreezing Components of a Student

### Budget

Responsibility:

Timeframe:

Freeze individual budget components to prevent them from being updated/ overwritten or deleted during subsequent budget calculations or reassignments. Be sure to freeze any manual overrides you make for budget components. When you unfreeze a component, it can be pdated/overwritten or removed by subsequent recalculations or reassignments. Follow the steps below to freeze/unfreeze components of a student's budget.

**Step 1** - Access the Student Budget Components (SBC) form for the appropriate award year and student record.

**Step 2** - Go to the Frz column for the budget component code you want to freeze/ unfreeze. The Frz column is on the far right-hand side of the form.

**Step 3** - If you want to freeze this budget component, enter **Y** in the Frz field. If you want to unfreeze (remove the freeze from) this budget component, enter **N** in the Frz field.

**Step 4** - Repeat Step 3 for each budget component code that you want to freeze/ unfreeze.

**Step 5** - Save your work on this form.

- The budget components are frozen/unfrozen.

# South Dakota Colleague System Procedures

## Producing the Student Budget Detail (SBDT) Report

Responsibility:

Timeframe:

Follow the steps below to generate a report that provides detailed information about the student's budget components.

**Step 1** - Access the Student Budget Detail (SBDT) form for the appropriate academic year.

**Step 2** - Do you want to include the need information described in "Printing Optional Need Analysis Information" above?

**Yes.** Enter **Y** in the Print Need Information field.

**No.** Enter **N** in the Print Need Information field.

**Step 3** - Do you want to use a saved list of student records from the FIN.AID file?

**Yes.** Enter the name of a list of IDs from the FIN.AID file in the Saved List field.

**No.** Leave blank the Saved List Name field. You can enter individual student IDs in the Students field.

**Step 4** - Do you want to process individual student IDs?

**Yes.** Enter the student IDs in the Students field. Use LookUp to help you select the student records you need.

**No.** Leave the Students field blank.

**Step 5** - Do you want to further narrow your selection?

**Yes.** Enter **Y** in the Additional Selection Criteria field. When you complete this form, the Additional Selection Criteria form is displayed. Enter your selection criteria on it.

**No.** Leave the Additional Selection Criteria field blank or enter **N**.

**Step 6** - Save your work on this form. The SBDT report is produced for the records you selected.

**Step 7** - Review the batch error report produced by the SBDT form to determine which records—if any—were not processed.

# South Dakota Colleague System Procedures

## Creating Initial Application Export Files

Responsibility:

Timeframe:

Use this procedure to originate FAFSA financial aid applications at the Department of Education. Before performing this procedure, you must enter each student's FAFSA information into Colleague. See "Maintaining Individual Applications".

If you are creating initial application export files for 2004/2005 processing years or earlier, do not rerun the IAPX process before exporting the first file you create. If you rerun the IAPX process before exporting, the first file you create is overwritten by the subsequent files you create. The end result is that you are only able to export the last file created.

If you are creating initial application export files for 2005/2006 processing years or later, Colleague automatically gives each export file created a unique file name based on the Job ID to prevent files from being overwritten. Just remember that if you run the IAPX process multiple times before you export, you'll have multiple files to send.

**Step 1** - Access the Initial Application Export (IAPX) form.

**Step 2** - Complete the following required fields:

- Academic Year
- File Name to Create

See online help for assistance with any of these fields.

**Step 3** - Enter your selection criteria using any or all of the following fields:

- Input Saved List Name
- Students
- Additional Selection Criteria

**Step 4** - Enter a name for a new saved list in the Output Saved List field.

**Step 5** - Finish out of the Initial Application Export (IAPX) form. All records successfully processed are now contained in your export file, which is stored in your FA.SEND.DIR directory file. Continue with "Exporting Flat File Information to SAIG".

# South Dakota Colleague System Procedures

## Creating Correction Application Export Files

Responsibility:

Timeframe:

Use this procedure to send FAFSA corrections to the Department of Education.

Before performing this procedure, you must do the following:

- ①○ Enter corrections for each student's FAFSA information into Colleague. See "Maintaining Individual Applications" for more information.
- ①○ Flag the Ready to Send field or Send Demo Changes field. See "Ready to Send Flag vs. Send Demo Changes Flag" for more information.

If you are creating correction application export files for 2004/2005 processing years or earlier, do not rerun the CAPX process before exporting the first file you create. If you rerun the CAPX process before exporting, the first file you create is overwritten by the subsequent files you create. The end result is that you are only able to export the last file created.

If you are creating correction application export files for 2005/2006 processing years or later, Colleague automatically gives each export file created a unique file name based on the Job ID to prevent files from being overwritten. Just remember that if you run the CAPX process multiple times before you export, you'll have multiple files to send.

**Step 1** - Access the Correction Application Export (CAPX) form.

**Step 2** - Complete the following required fields:

- ①○ Academic Year
- ①○ File Name to Create

See online help for assistance with any of these fields.

**Step 3** - Enter your selection criteria using any or all of the following fields:

- ①○ Input Saved List Name
- ①○ Students
- ①○ Additional Selection Criteria

**Step 4** - Finish out of the CAPX form. All records successfully processed are now contained in your export file, which is stored in your FA.SEND.DIR directory file. Continue with "Exporting Flat File Information to SAIG".

# South Dakota Colleague System Procedures

## Requesting Initial ISIRs

Responsibility:

Timeframe:

Follow the steps below to request an initial ISIR for applicants who did not list your institution's Title IV Code on their initial FAFSA.

**Step 1** - Access the ISIR School Code Addition (ISCA) form for the appropriate year for the applicant(s) for whom you are requesting an initial ISIR(s).

**Step 2** - If your institution uses EDCONNECT, enter Y in the Use EDCONNECT field.

**Step 3** - Enter your institution's Title IV Institution Code in the School Code field.

**Step 4** - Enter the applicant's Social Security Number in the SSN field.

**Step 5** - Enter the first two letters of the applicant's last name in the Last Name field.

**Step 6** - Enter the applicant's DRN from the applicant's paper Student Aid Report (SAR).

**Step 7** - Repeat Step 4 through Step 6 for each applicant for whom you want to request an initial ISIR.

**Step 8** - Finish out of the ISCA form.

# South Dakota Colleague System Procedures

## **ISIR Verification Processing (IVER) Form**

Responsibility:

Timeframe:

Use the ISIR Verification Processing (IVER) form for verification processing and to change a student's verification status to 7 – Verification Complete. To access the student's verification information, detail on the Student Verif field. To access the parent's verification information, detail on the Parent Verif field.

# South Dakota Colleague System Procedures

## **ISIR Student Verification (ISSV) Form**

Responsibility:

Timeframe:

Use the ISIR Student Verification (ISSV) form to verify student information. The information displayed depends on how you access the form. If you access the IVER form from the menu, the information displayed on the ISSV form comes from the federally flagged ISIR transaction or any available correction to that ISIR transaction.

If you access the IVER form from the NASU and NAWC forms the information comes from a different location. In that instance, the information displayed on the ISSV form comes from the transaction chosen on the NASU form and any available corrections to that ISIR transaction. Parent information can be found on the ISIR Parent Verification (ISPV) form.



# South Dakota Colleague System Procedures

## **ISIR Parent Verification (ISPV) Form**

Responsibility:

Timeframe:

Use the ISIR Parent Verification (ISPV) form to verify parent information. The information displayed depends on how you access the form. If you access the IVER form from the menu, the information displayed on the ISPV form comes from the federally flagged ISIR transaction or any available correction to that ISIR transaction.

If you access the IVER form from the NASU and NAWC forms the information comes from a different location. In that instance, the information displayed on the ISPV form comes from the transaction chosen on the NASU form and any available corrections to that ISIR transaction.

Student information can be found on the ISIR Student Verification (ISSV) form.

# South Dakota Colleague System Procedures

## Selecting Groups of Students for Verification

Responsibility:

Timeframe:

Use the Select Verification Students (SVST) form to change the verification status for a group of students to anything but '7 - Verification Complete.'

You must use at least one of the following fields to select students to run through the SVST process:

- Input Saved List Name
- Students

All of the students run through the SVST process have their Verification Statuses changed to the value chosen in the Force Verif Status To field regardless of their original Verification Status.

**Note:** Use the ISIR Verification Processing (IVER) form to change a student's verification status to 7 – Verification Complete.

**Note:** Colleague prevents you from running the SVST process without entering selection criteria. Doing so would change all of your students to the selected verification status.