

**Student
Information Systems**



**Yearly
Setup
Module**

Procedure Manual



South Dakota Colleague System Procedures

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Revisions with this Update

New cover page

New preface

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PREFACE

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Colleague System Instructions

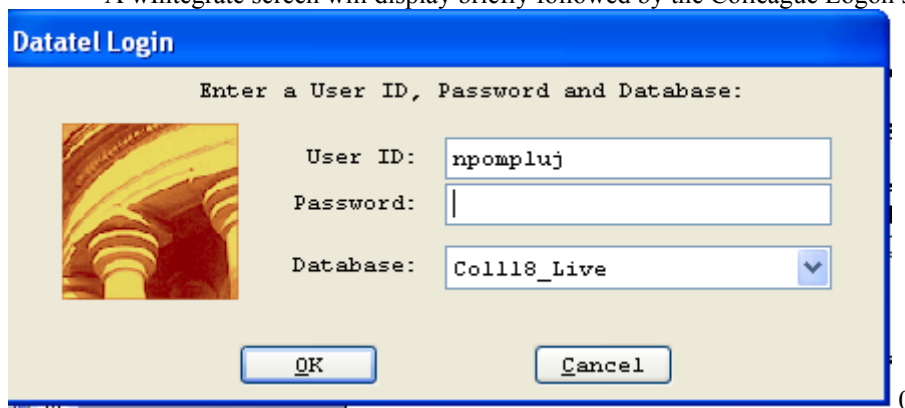
Responsibility: University

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.

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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">1. Live Account2. Change Password3. Log Off <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.

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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.

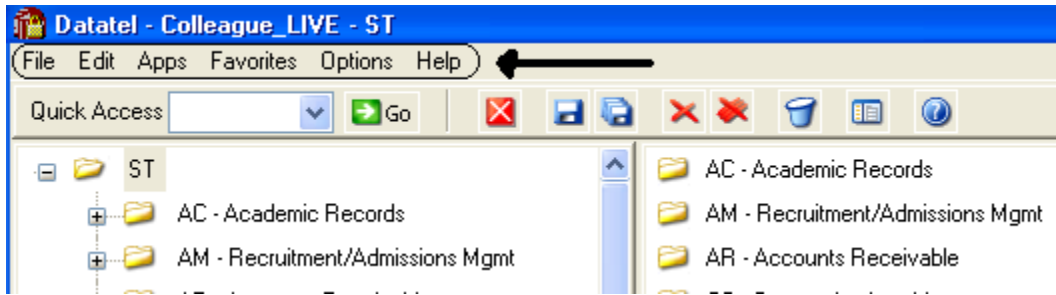
Password Change Requirements

- a) Users will be required to change password every 20 weeks. After the 18th 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.

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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.

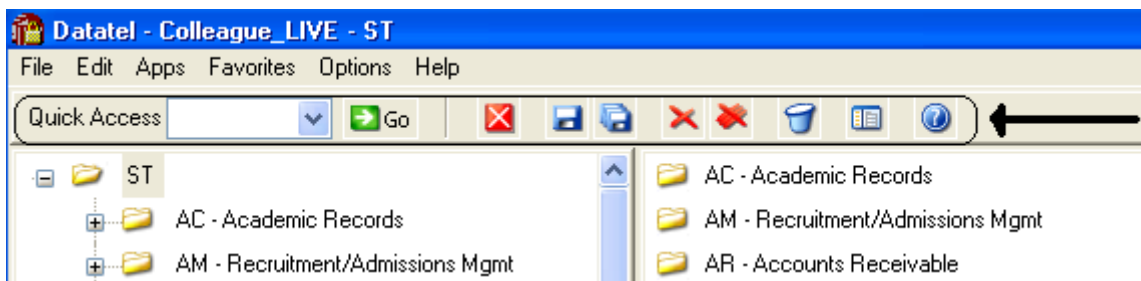
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

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.

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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.

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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 2nd top row or pressing F2) or finish out (clicking on single black X box in the 2nd 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

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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.

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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.

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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.

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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

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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.

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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****

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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.

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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.

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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

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Setting Up FA Institutional Defaults

Responsibility: Central

Timeframe: Review Once yearly - see annual set-up document in appendix

Use the FA Institutional Defaults (FIDF) screen to maintain institutional defaults for use in the FA module. FA institutional defaults provide the institutional information that appears on the Financial Aid transcript and agreement letters. Also, certain institutional data will be sent as part of the Header or Trailer of data batches that are exported from Colleague.

The FA Institutional Defaults (FIDF) screen requires a default Financial Aid office. You must establish a default Financial Aid office whether you are a single location or multi-location institution. FA office parameters are entered on the FA Office Parameters (FAOP) screen. Award fund budgets are stored by FA office. Colleague tracks student awards against the appropriate FA office fund balance. Therefore, even if you are a single location institution, you must establish at least one FA office. For information about setting up FA office parameters, see “Setting Up FA Office Parameters” in *Using Financial Aid: Pell Payments & Loans*, Chapter 3.

Field Set up for FIDF in South Dakota:

- College Name Blank
- College Address Blank
- College CSZ Blank
- FA Director Blank
- Phone Number Blank
- E-mail Address Blank
- Fax Number Blank
- FA Office ID default FA office
- Title IV School Code Blank
- OPE ID Blank
- Destination Point *RIS TIVWAN # TG52193*
- Loan Defaults
- COD Defaults.

In the event that:

- the student has not been assigned to a location
- the student’s assigned location is not associated to an FA office, or
- the data is not specified for the FA office,

Colleague uses the data for the institution.

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Setting Up FA Office Parameters

Responsibility: FA Directors

Timeframe: Review Once yearly - see annual set-up document in appendix

Use the FA Office Parameters (FAOP) screen to maintain Financial Aid office parameters. The FA Institutional Defaults (FIDF) screen requires a default Financial Aid office. You must establish a default Financial Aid office whether you are a single location or multi-location institution. FA office parameters are defined on the FA Office Parameters (FAOP) screen.

Award fund budgets are stored by FA office. Colleague tracks student awards against the appropriate FA office fund balance. Therefore, even if you are a single location institution, you must establish at least one FA office.

Use the FA Locations Definition (FLCD) screen to associate a location with an FA office. Use the Location Rule Table (LCRL) screen to define a rule table or subroutine that assigns a location, along with the associated office, to a student.

Colleague displays the system defaults from the FA Institutional Defaults (FIDF) screen on the bottom right of the FA Office Parameters (FAOP) screen. You need only enter office parameters that differ from the system default. See "Setting Up FA Institutional Defaults."

Certain Header, Institution Name/Address, Internet Address, and Trailer fields in the Pell Export (CODE) batch can be maintained on both the FA Institutional Defaults (FIDF) screen and the FA Office Parameters (FAOP) screen. When Colleague looks for a location, if the data is present in the location record, the location's information will be used. If it is not present, the information will be obtained from FIDF.

The following FA Office Parameters (FAOP) fields are required or used in Pell payment processing.

- Office Name
- Office Address
- Office CSZ
- FA Director
- Phone Number
- Fax Number
- E-mail Address
- Loan Default
- Title IV School Code
- OPE ID
- Destination Point

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In the event that:

- the student has not been assigned to a location
- the student's assigned location is not associated to an FA office, or
- the data is not specified for the FA office

Colleague uses the data for the institution.

Complete the following steps to maintain FA office parameters.

Note: The information you enter on the FA Office Parameters (FAOP) screen applies to your *Financial Aid office*. *Enter institutional defaults on the FA Institutional Defaults (FIDF) screen*. For information about institutional defaults, see "Setting Up FA Institutional Defaults."

Step 1 - Access the FA Office Parameters (FAOP) screen.

- Colleague displays the system defaults from the FA Institutional Defaults (FIDF) screen on the bottom right of the FAOP screen.

Step 2 - Enter the ID of the FA office that you want to maintain.

Step 3 - In the Office Name field, enter the name of the FA office.

- The office name appears on the Financial Aid transcript. The office name is also used on the FA Budget by Office (FBBO) screen and the Office Fund Balances (OFBL) screen. This field is required.

Step 4 - If you are a single location institution, you may go to Step 10. If you are a multi-location institution, continue with Step 5.

Step 5 - In the Office Address field, enter the address of the FA office.

- Colleague may send this address in the Institution Name/Address portion of the Pell Export (CODE) batch. This group has an unlimited number of rows for entering the address.

Step 6 - In the Office City, Office State, and Office Zip fields, enter the city, state, and zip code of the FA office.

- Colleague may send this city, state, and Zip code in the Institution Name/Address portion of the Pell Export (CODE) batch.

Step 7 - In the FA Director field, enter the name of the Financial Aid director for the FA office.

- Colleague may send this name in the Trailer portion of the Pell Export (CODE) batch.

Step 8 - In the Phone Number field, enter the phone number of the FA director for the FA office.

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- Colleague may send this phone number in the Trailer portion of the Pell Export (CODE) batch.

Step 9 - In the Fax Number field, enter the fax number of the FA director for the FA office.

- Colleague may send this fax number in the Trailer portion of the Pell Export (CODE) batch.

Step 10 - In the E-mail Address field, enter the E-mail address of the FA director for the FA office.

- Colleague may send this internet address in the Internet Address portion of the Pell Export (CODE) batch.

Step 11 - In the Title IV Code field, enter the Title IV institution code assigned to your Financial Aid office.

Note: You need only enter the Title IV code if it differs from the system default.

- The Title IV institution code is a six character code beginning with 0, B, E, or G. Central Processing System (CPS) uses the Title IV code to identify your institution when it returns electronic Institution Student Information Records (ISIRs) after processing.

Step 12 - Enter the OPE ID number assigned to your Financial Aid office.

Note: You need only enter the OPE ID number if it differs from the institutional defaults on the FIDF screen. This number is an eight-character Office of Post-Secondary Education ID code assigned to your institution by the Department of Education and is associated with the Pell reporting institution. RFMS uses the OPE ID to identify your institution when RFMS records are exchanged.

Step 13 - In the Destination Point field, enter the destination point code assigned to the FA office by the Department of Education.

Note: You need only enter the destination point code if it differs from the system default. Destination point codes are assigned to institutions by the Department of Education for participation in Electronic Data Exchange (EDE) on the Title IV Wide Area Network. Destination point codes follow the format TGxxxxx where “xxxxx” is a five-digit number and can be found on your processed Letter of Application.

- Colleague may send this destination point code in the Header and Trailer portions of the Initial Application Export (IAPX) batch and the Correction Application Export (CAPX) batch. Colleague also may send it in the Header portion of the Pell Export (CODE) batch.

Step 14 - Save the parameters for the FA office.

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Need Analysis Summary

Responsible: Used by all

Timeframe: On-going

Step 1 – Access the Need Analysis Summary (NASU) screen

Step 2 - Enter the academic year or select the displayed academic year

Step 3 - Enter a student ID or use LookUp to find the student record you want

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Application Workflow Choices

Responsible: Used by all

Timeframe: On-going

Use the Application Workflow Choices (NAWC) screen (detail from NASU) to access additional ISIR functions. The information that you view on only applies to the specific transaction you detail from. Detailing on the fields on NAWC allows you to reach the following screens:

Step 1 – Correct a FAFSA Application field

- Detail on the Correct a FAFSA Application field to reach the following screens:
xx- 2 digit yr
SDxx - Student FA Demographic Data
SIxx - Student FA Interests
SFxx - Student FA Financial Data
DSxx - Dependency Status Questions
PIxx - Parent FA Demographic Data
PFxx - Parent FA Financial Data
RSxx - Releases/Signatures for FAFSA
- Use these screens to make corrections to an individual student's FAFSA application.

Step 2 - Create/Maintain a FAFSA Application

- Detail on the Create/Maintain a FAFSA Application field to access all of the FAFSA application screens. As you finish out of each screen, Colleague displays the next screen in the process until you have finished out of all of the FAFSA application screens. Colleague takes you through the following screens:

xx- 2 digit yr
SDxx - Student FA Demographic Data
SIxx - Student FA Interests
SFxx - Student FA Financial Data
DSxx - Dependency Status Questions
PIxx - Parent FA Demographic Data
PFxx - Parent FA Financial Data
RSxx - Releases/Signatures for FAFSA

- Use these screens to create or make corrections to an individual student's FAFSA application.

Step 3 - Correct a Supplemental Application...

- Detail on the Correct a Supplemental Application field to reach the following screens:

xx- 2 digit yr

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SDxx - Student FA Demographic Data
SIxx - Student FA Interests
SFxx - Student FA Financial Data
DSxx - Dependency Status Questions
PIxx - Parent FA Demographic Data
PFxx - Parent FA Financial Data
RSxx - Releases/Signatures for FAFSA

Step 4 - Create/Maintain a Supplemental Appl..

- Detail here to create and maintain a Supplemental Application. This type of application is used for awarding Institutional monies.
- Detail on this field to access all of the FAFSA application screens. As you finish out of each screen, Colleague displays the next screen in the process until you have finished out of all of the FAFSA application screens. Colleague takes you through the following screens:

xx- 2 digit yr
SDxx - Student FA Demographic Data
SIxx - Student FA Interests
SFxx - Student FA Financial Data
DSxx - Dependency Status Questions
PIxx - Parent FA Demographic Data
PFxx - Parent FA Financial Data
RSxx - Releases/Signatures for FAFSA

- Use these screens to make corrections to an individual student's FAFSA application.
- The transaction record must be an ISIR SUPP type or blank to detail on the Create/Maintain a Supplemental Appl field.

Step 5 - View NSLDS Information

- Detail on the View NSLDS Information field to view National Student Loan Data System (NSLDS) information on the following screen:

NAGI - Loan Information and Other Loan/Pell Info

Step 6 - View CPS General Information.....

- Detail on the View CPS General Information field to access the CPS Information (CPSI) screen.

Step 7 - View CPS Edits and Overrides

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- Detail on the View CPS Edits and Overrides field to access the CPS Overrides/Comment Codes (CPSR) screen.

Step 8 - View Calculation Results

- Detail on the View Calculation Results field to access the Calc Results Details (CRDT) screen. Detailing on this field displays the calculation results from the transaction being worked on.

Step 9 - View Correction Calculation Results

- Detail on the View Correction Calculation Results field to access the Calc Results Details (CRDT) screen. Detailing on this field displays the calculation results from the ISIR correction record.

Step 10 - Compare Selected ISIR to Fed Flagged.

- When you detail on this field, you will be comparing the selected ISIR record to the Federally flagged ISIR record. Colleague displays any existing correction data for both records.
- Colleague displays only fields with differences. Fields with the same value are not displayed. For fields with differences, Colleague displays the following:

Field name
Federal ISIR value
Current ISIR value

Step 11 - ISIR Verification Processing (SD should not access IVER from NASU because it IVER will not write down to local from detailing on NASU. Access IVER from the main menu.

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Select Verification Students

Responsibility: SD does not use

Timeframe:

Use the Select Verification Students (SVST) form to select a sample of students to verify. The addition of the SVST form provides the following three main benefits:

- QA schools can now perform self-select verification.
- 100% verification schools can set their sample.
- 30% verification schools can set their own sample rather than use the sample the Department of Education selects.

Step 1 – Access the Select Verification Students (SVST) form

Step 2 – Enter the Academic Year

Step 3 – Select the Verification Status Change Code

Step 4 – Enter a SavedList Name

South Dakota Colleague System Procedures

FAFSA Application Demographic Update

Responsibility: institution

Timeframe: on going

Use the FAFSA Application Demographic Update (FADU) form to maintain information about the student that is stored in the Core Demographics (DM) module. This form displays a comparison of the information that is contained in both the Federally flagged ISIR and Core. You can modify the Demographics information by moving the financial aid information to the corresponding demographics fields (refer to field help for Action/Compare fields).

To send demographic changes to EDE, change the Send Demo Changes field to [Y], and the changes will get picked up during the Correction Application Export (CAPX) process. If that field is not set to [Y] the demographic changes will not be sent, even if you update the data into Core.

Step 1 – Access the FAFSA APP Demographic Update (FADU) screen

Step 2 – Enter the Academic Year LookUp

Step 3 – Enter the student ID or search by name

South Dakota Colleague System Procedures

Linking Student Identifiers

Responsibility: SD does not use

Timeframe:

Step 1 - Access the COD Unlinked Records Report (CDUR) form.

Step 2 - Enter the group you want to run the CDUR report on in the “Report on Students, PLUS Borrowers, All” field.

Step 3 - Do you want to include records previously flagged to ignore in your report?

Yes - Enter Y in the “Include previously flagged to ignore” field.

No - Enter N in the “Include previously flagged to ignore” field.

Step 4 - Do you want to include any additional selection criteria?

Yes - Enter Y in the Additional Selection Criteria field.

No - Enter N in the Additional Selection Criteria field.

Step 5 - Finish out of the CDUR form.

- If you chose to include additional selection criteria, enter it in the form displayed when you finish out.
- Colleague prints the Unlinked COD.PERSON Report.

Step 6 - Access the COD Identifier Link to ID (CIDL) form.

Step 7 - In the first prompt, select the type of records you want to link. You can select one of the following:

■S – Students

■P – PLUS Borrowers

■A – All, Students and PLUS Borrowers

Step 8 - Do you want records previously marked to ignore to be available for linking?

Yes - Enter Y in the “Include previously ignored” prompt.

No - Enter N in the “Include previously ignored” prompt.

Step 9 - In the COD.PERSON prompt, enter the COD.PERSON record you want to link to a Colleague ID or perform a LookUp.

- The Unlinked COD.PERSON Report you printed out earlier lets you know which COD.PERSON records need to be linked.

Step 10 - In the Link to PERSON ID field, enter the Colleague ID you want to link this COD.PERSON record.

Step 11 - Verify that the COD.PERSON record information displayed on the top of the form matches the Colleague information displayed at the bottom of the form.

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Step 12 - Do you want to ignore this record in the future?

Yes - Enter Y in the Ignore this record field.

No - Enter N in the Ignore this record field.

Step 13 - Finish out of the CIDL form.

- Colleague links the COD.PERSON record to the Colleague ID to which you selected.
- It also removes the newly linked COD.PERSON record from the COD.RECEIVE.DIR.

South Dakota Colleague System Procedures

Reassigning Promissory Notes to a Different ID

Responsibility: SD does not use

Timeframe:

Step 1 – Access the Reassign COD MPN (RMPN) screen

Step 2 – Enter the MPN Lookup

South Dakota Colleague System Procedures

FA COD Identifier Changes

Responsibility: Institutions

Timeframe: on going

Step 1 – Access the FA COD Identifier Change (FCDC) form

Step 2 – Enter the student ID or search by name

South Dakota Colleague System Procedures

View DOEI Log File

Responsibility: RIS

Timeframe:

Use the View DOEI Log File (VDLF) form to view a list of files currently in the FA.COD.LOG.DIR directory file. This directory contains the log files from the Department of Ed Import (DOEI) process.

Step 1 – Access the DOEI screen

Step 2 - Detail any file you are interested in to see it's contents.

Step 3 - This form can be used to delete any unneeded files from the directory.

- Enter **Y** for each file to delete from the FA.COD.LOG.DIR directory.
- Leave this field blank, or enter **N**, for each file to keep in the directory.

South Dakota Colleague System Procedures

ReSend COD Data

Responsibility: RIS

Timeframe:

Step 1 – Access the FA Reprocess COD Document (FRCD) screen

Step 2 – Enter the Document ID at the lookup

Step 3 –

South Dakota Colleague System Procedures

Adding ISIR School Codes

Responsibility: SD does not use

Timeframe:

This process permits you to request initial ISIRs for applicants who did not list your institution's Title IV Institution code on their initial FAFSA applications. The ISCA process adds your institution's school code to the list of school codes contained in a student's ISIR.

The new school code will always overwrite the first value in the existing list of school codes in the ISIR.

Step 1 – Access the ISIR School Code Addition (ISCA) form

Step 2 – Enter Y or N in the Use EDCONNECT field

Step 3 – Enter the School Code

South Dakota Colleague System Procedures

Viewing the ISIR Alert Report

Responsibility: ESC

Timeframe: on going

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.

Step 1 – Access the ISIR Alert Report (IART) form

Step 2 – Enter the FA Year

Step 3 – Enter the Change Source

Step 4 – Enter a Savedlist Name

South Dakota Colleague System Procedures

Printing ISIRs

Responsibility: institution

Timeframe: on going

Some institutions print Institutional Student Information Records (ISIRs) so they can have hard copies of these records in their files. Colleague now provides the ability to print ISIRs.

The ISIR process prints only ISIR and CPSSG transaction types. The IAPP, SUPP, PROF, and CORR types are not printed. You can print ISIRs for individual students or a group of students.

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

Step 2 – Enter the Year

Step 3 – Enter Y or N to include FAA Comments

Step 4 – Enter Y or N to include Loan Information

Step 5 – Enter Y or N to include the Signature/Certification

Step 6 – Enter a Savedlist Name or the ID of individual students

Step 7 – To further narrow your selection criteria, enter the Start/End date, CPS Transaction Preference and/or Additional Selection Criteria

Step 8 – Update the record

South Dakota Colleague System Procedures

Awarding a Pell to a Student

Responsibility: University - in Cindy's section

Use this procedure to award a Pell grant to a student. When you are finished with this procedure, you must run the Export COD XML Records (CODX) process to “originate” the award at the COD System. The information in this procedure can also help you modify information for an existing award.

Step 1 - Access the Award Detail Entry (AIDE) screen.

Step 2 - At the Academic Year Lookup, enter the applicable Academic Year.

Step 3 - At the Person Lookup, enter the student to whom you want to award a Pell grant.

- Enter the Student ID if you know it, or perform a Person LookUp to locate the student in the database.

Step 4 - In the Award field, go to a blank line and enter a Pell award code.

- If you have eligibility checking turned on, Colleague evaluates whether the student is eligible for the award. If the student is not eligible, Colleague displays the Award Eligibility Status (AECF) screen, on which you can override the student's ineligible status.

Step 5 - In the Amount field on the same line, enter the amount of the Pell award.

Step 6 - Do you want to view or modify any details about this award?

Yes. Continue with the next Step.

No. You are done with the procedure. Save your work and exit the AIDE screen.

Step 7 - Return to the Award field and detail to the Pell COD Disbursements (PLCD) screen.

- Colleague displays a mini-menu from which you select the PLCD screen.
- Any other screens on the menu are not used in this procedure.

Step 8 - Review the disbursement information on the PLCD screen, and enter or change any information as needed.

Step 9 - Do you want to view or modify any additional details about this award?

Yes. Continue with the next Step.

No. Continue with Step 12.

Step 10 - Go to the Pell Overrides field and detail to the COD Pell Overrides (CPOO) screen.

- Review the information on the CPOO screen, and enter or change any information as needed.

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- The COD Pell Overrides (CPOO) form is obsolete for the 2005/2006 processing year and later. You can still access the CPOO form for earlier processing years. The following fields are still relevant and have been moved to the Pell COD

Disbursements (PLCD) form:

- Enrollment Date
- Low Tuition Ind (Indicator)
- Pell Transaction Number Override

Step 11 - When you are done updating information, save your work and exit the CPOO screen.

- Colleague returns you to the PLCD screen.

Step 12 - When you are done updating information, save your work and exit the PLCD screen.

- Colleague returns you to the AIDE screen.

Step 13 - Save your work and exit the AIDE screen.

Note: The next time you run the Export COD XML Records (CODX) process with the Pell flag set to “Yes,” Colleague transmits this new award information to the COD System.

South Dakota Colleague System Procedures

Noncustodial Parent's Statements

Responsibility: SD does not use

Timeframe:

Use the following procedure to access and record any available Noncustodial Parent's Statement information.

Step 1 - Manually download the 80-character file that replaces the paper Noncustodial Parent's Statement.

Step 2 - View the contents of the file using the Unprocessed File Imports (UFIF) form and make note of which students have detailed Noncustodial Parent's Statements available on the College Board's web site.

Step 3 - Log onto the College Board's web site to access the students detailed Noncustodial Parent's Statement Information.

Step 4 - Record the data on the Family Info/Signatures (PFI5) form.

South Dakota Colleague System Procedures

Modified forms

What, if anything, needs to be updated for these forms that are reported to have been modified? If anything has changed, copy the procedure from the FA manual, insert & highlight the change in this document OR to make the change in the FA manual itself, insert/change the date of the text box for the procedure that changed, make the change in the procedure, copy the title of the procedure and an excerpt from the procedure of what has changed, paste it in the 'Revisions with this Update' at the top of the manual and highlight the specific change.

The Export COD XML Records (CODE) Form

The Export COD XML Records (CODE) form has been updated to use the file structure created during the ISIR Transaction History project. The CODE process no longer finds transaction numbers in the EA.ACYR file. Instead, the CODE process finds relevant transaction numbers in the ISIR.DEMO file. This change is relevant only to the 2005/2006 year and later. There is no change in the CODE process for previous years.

The COD Pell Overrides (CPOO) Form in Cindy's

The COD Pell Overrides (CPOO) form is obsolete for the 2005/2006 processing year and later. You can still access the CPOO form for earlier processing years. The following fields are still relevant and have been moved to the Pell COD Disbursements (PLCD) form:

- ⓪ Enrollment Date
- ⓪ Low Tuition Ind (Indicator)
- ⓪ Pell Transaction Number Override