

**Student
Information Systems**



**Awarding
Aid**



**Distribution
Module**



Procedure Manual



South Dakota Colleague System Procedures

Table of Contents

Revisions with this Update	5
PREFACE	6
Colleague System Instructions	7
Function keys	13
Search Procedures	14
Record Search Overview	16
Individual and Corporation Record Relationship	18
Flagging records on a resolution screen	20
Using a savedlist to process large numbers of records	21
Setup Procedures Provided in this Manual	22
Defining Awarding Parameters	23
<i>Attendance Ptrn Rule</i>	23
<i>Award Accepted Appl Only</i>	23
<i>Check Elig on New Award</i>	23
<i>Maintain CWS Earnings</i>	23
<i>Annual Action Date Dflt</i>	24
<i>Awd Per Action Date Dflt</i>	24
<i>Xmit Coll LT Disb Roster</i>	24
<i>Xmit Coll GT Disb Roster</i>	24
<i>Non-Awarded Action Category</i>	24
Defining Award Categories	26
Defining an Award Action Codes	27
Defining Global Eligibility Criteria	28
Defining Award Codes	30
Defining Award Eligibility Criteria	33
Defining a Default Award Amount	35
Defining Transmittal Limitations for a Destination 1, 6, or 7 Award	37
Checklist for Defining the Pell Award	39
Defining Award Periods	40
Defining Attendance Patterns	41
Defining Attendance Pattern Rules	42
Viewing Funds for an Award	44
Defining Award Fund Budgets Across Multiple FA Offices	45
Defining a Fund Budget for a Single FA Office	46
Keeping Fund Balances Accurate	47
Defining Pell Yearly Entitlement Figures	48
Resetting Students' Federal, Institutional, and Pell Flags	49
Defining FA Reg Credit Parameters	50
Setting Up Federal Pell Grants	51
Setting Up FFELP and Federal Direct Loan Award Amounts	52
Setting Up Federal Supplemental Educational Opportunity Grant (FSEOG)	53
Setting Up Federal Perkins Loans	54
Setting Up Federal Work Study	55
Packaging on the Basis of Last Year's Percentage	56
Packaging Percent Rules	57
Putting Your Automatic Packaging Strategy on Paper	58
<i>Planning Packaging Groups of Students</i>	58
<i>Planning Packaging Categories of AwardFunds</i>	58
<i>Defining Awards Parameters for Use in Automatic Packaging</i>	59
Entering Data From Completed Automatic Packaging Worksheets	61
Using the APGR Report to Review Packaging Category and Award Setup	63
Running the PKCR Form in Simulation Mode	64
Creating Aid Packages for Groups of Students	66
Packaging an Individual Student	68

South Dakota Colleague System Procedures

Completely Repackaging a Student or Group of Students	69
Entering a New Award	70
Modifying an Existing Award	72
Adjusting Award Distributions.....	73
Reassigning the Student’s Attendance Pattern	74
Overriding the Assigned Attendance Pattern	75
Redistributing Student Awards.....	76
Overriding the Student’s Current Location	77
Changing Award Period Information	78
Overriding Eligibility Criteria	81
Restoring Default Eligibility Criteria	83
Overriding Transmittal Limitations.....	84
Restoring Default Transmittal Limitations	88
Awarding Aid to Groups of Students	89
Creating CS.ACYR Records	92
Transfer Monitoring Export (TMXP) Form	93
Transfer Monitoring Import (TMIM) Form	94
Transfer Monitoring Status (TMSS) Form	95
TM Alert Status Report (TMSR) Form	96
TM Warning and Rejects Report (TMWR) Form	97
Reject Errors and Warning Codes	98
<i>Reject Errors</i>	98
<i>Warning Codes</i>	100
TM Missing Responses Re-flag (TMMR) Form	101
Steps for Setting Up Return of Funds Processing.....	102
Entering Closed Days Data	103
Specifying FSEOG Matching.....	104
Maintaining/Adding Title IV Categories.....	105
Mapping Title IV Codes for Individual Award Funds	106
Defining AR Codes/Categories	107
Calculating Return of Title IV Funds	108
Restoring Data for Calculation Made in Error.....	110
Summary Return of Funds Rprt (ROFS) Form	111
Detail Return of Funds Report.....	112
Purging Data from the ROF.ACYR File	113
Entering FA Student Comments.....	114
FA Award History Summary (AWSU) Form.....	115
<i>Year</i>	115
<i>Awarded Total</i>	115
<i>Transmitted</i>	115
<i>ROF (Return of Funds)</i>	115
<i>Warning Messages</i>	115
High-Level SAP Setup Steps.....	116
Setting Up SAP Types.....	117
Setting Up SAP Grade Definitions	119
Setting Up SAP Appeal Action Codes	121
Calculating SAP Status.....	122
Recording a New SAP Appeal Action.....	124
SAP Management Report	126
High-Level Setup Steps for FISAP Reporting Setting up Annual Parameters	127
FISAP Reporting	128
<i>Setting Up Eligible Aid Applicants Data for Dependent Students</i>	128
<i>Setting Up Eligible Aid Applicants Data for Independent Students</i>	128
<i>Setting Up Program Summary Data for Dependent Students</i>	128
<i>Setting Up Program Summary Data for Independent Students</i>	129
Producing the FISAP Eligible Aid Applicants Report	130

South Dakota Colleague System Procedures

Producing the FISAP Program Recipients Report.....	131
Producing the Payroll Notification Report.....	132
Producing the Awards Register.....	133
Producing the Award Analysis Report.....	135
Producing the Overaward Report.....	136
Reporting on Ineligible Applicants.....	137
Generating FA Mailing Labels.....	138
Reporting on Financial Aid and Registration Discrepancies.....	140
Producing the Fund Management Report.....	142
Setting Up the ALPA Form.....	144
Setting Up the ALRT Form.....	146
Associating the S.PRINT.ALTR Subroutine with the Award Letter ID of ALTR2.....	147
<i>Setting Up the FALD Form</i>	147
Using a Custom Award Letter.....	148
Printing Award Letters.....	149

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.



Datatel Login

Enter a User ID, Password and Database:

User ID: npompluj

Password: |

Database: Coll18_Live

OK Cancel

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">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.

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.

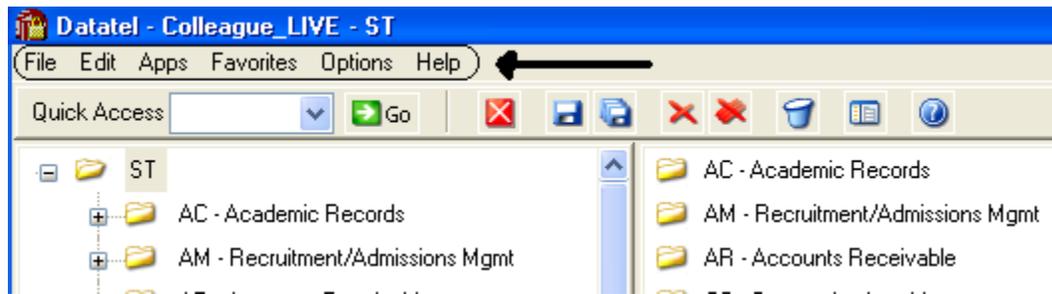
Password Change Requirements

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

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.

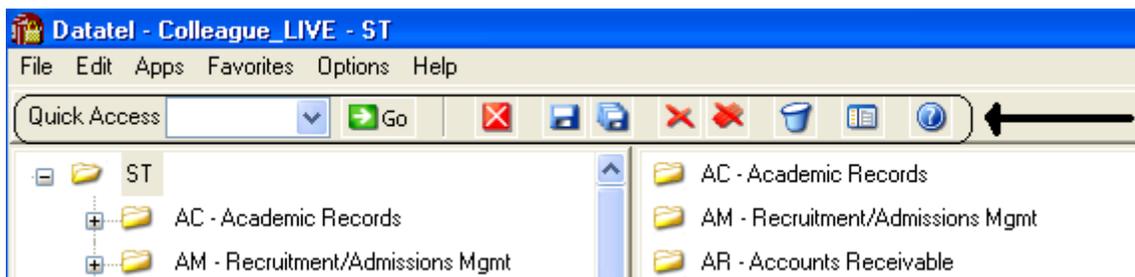
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

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 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

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

Setup Procedures Provided in this Manual

Responsibility:

Timeframe:

ALERT! Complete the procedures provided in *Getting Started with Colleague Student* before you complete the procedures listed here.

Steps for setting up awarding system parameters and codes

Getting Started with Colleague Student

Overview of Setting Up Awarding

Setting Up Functions Used by All Awards

Defining Individual Award Funds

Setting Up Attendance Patterns

Setting Up Award Fund Budgets

Additional Awarding Setup Tasks

Setting Up Automatic Packaging Processing

Automatic Packaging of Federal Aid

Special Tools for Setting Up Automatic Packaging

Putting Your Automatic Packaging Strategy On Paper

Entering Your Packaging Setup On Colleague

Testing and Refining Your Automatic Packaging Setup

Setting Up Return of Title IV Funds

Setting up closed days at your institution

Entering Return of Funds Closed Days Data

Setting up Title IV categories

Defining AR codes and categories for return of funds

Setting Up Satisfactory Academic Progress

Setting Up FISAP Reporting Setting up annual parameters

Setting up income ranges

Setting up eligible aid applicants data for dependent students

Setting up eligible aid applicants data for independent students

Setting up program summary data for dependent students

Setting up program summary data for independent students

South Dakota Colleague System Procedures

Defining Awarding Parameters

Responsibility: RIS

Timeframe: once yearly

This section provides a description of and a procedure for defining the awarding parameters on the FA Awarding Parameters (FAAP) form.

Attendance Ptrn Rule

Enter the ATPC rule.

If you expect to use the same rule table from year to year to assign attendance patterns to students, enter a non-year-specific rule table ID in this field, and modify the component rules each year.

If you expect to use one set of rules to assign attendance patterns for the current FA year, and a different set of rules for other FA years, enter a year specific rule table ID in the Attendance Pattern Rule field on the Packaging Definition (PKDF) form. Your entry on the PKDF form serves as an override of the your entry in this field for that year.

Forms that assign attendance patterns first check the Attendance Pattern Rule field on the Packaging Definition (PKDF) form for a year-specific rule table ID. If that field is blank, the forms check this field. Forms that assign attendance patterns first include the following:

- Student Attendance Pattern (SATP) form
- Student Packaging Definition (SPCK) form
- Automatic Packaging (PKCR) form

You can detail from this field to the Attendance Pattern Rule Table (PATR) form to create an attendance pattern rule table.

Award Accepted Appl Only

Set this field to "No"

If you enter **Y**, you can award aid only to those applicant's who have a STUDENTS record or whose admissions status constitutes accepted for enrollment.

If you enter **N** in this field, you can award aid to applicants that have not been admitted.

Check Elig on New Award

Set this field to "Yes"

If you enter **Y** in this field, Colleague checks the applicant's eligibility when you enter a new award for an applicant on the Award Detail Entry (AIDE) form.

If you enter **N** in this field, Colleague does not check the applicant's eligibility when you enter an new award for an applicant on the Award Detail Entry (AIDE) form.

You can change this parameter to reflect changes in your awarding policy. For example, you may want to check eligibility at certain times during the year, but you may not want to check eligibility at other times of the year. Because you can change this parameter at any time, you can use this flexibility for awarding purposes.

Maintain CWS Earnings

Set this field to "Yes"

South Dakota Colleague System Procedures

If you use the Datatel Colleague Payroll module, enter **N** in this field. The Payroll module tracks college work study (CWS) earnings.

If you do not use Payroll module, enter **Y** in this field to maintain CWS earnings from the Award Detail Entry (AIDE) form.

Annual Action Date Dflt

Set this field to “Yes”

If you enter **Y** in this field, any saved changes you make to the amount or action fields for annual awards on the Award Detail Entry (AIDE), Award Period View (AWPV), or Detail Award View (DAV) forms automatically update the annual award amount action date fields on those forms to the date on which you make the change. (The annual award amount action date specifies the award amount date for the academic year.)

If you enter **N** in this field, the annual award amount dates on the AIDE, AWPV, and DAV forms are not updated when you make changes to these forms.

Awd Per Action Date Dflt

Set this field to “Yes”

If you enter **Y** in this field, any saved changes you make to the amount or action fields for award period awards on the Award Detail Entry (AIDE), Award Period View (AWPV), or Detail Award View (DAV) forms automatically updates the [Award Period] Date field in the Awd Per group on the AIDE form.

If you enter **N** in this field, award period dates on the AIDE, AWPV, and DAV forms are not updated.

Xmit Coll LT Disb Roster

Set this field to “Yes”

This field is for electronic loan processing only.

If you enter **Y** in this field and the Colleague anticipated disbursement amount is less than the gross disbursement amount on the roster record, Colleague compares the gross disbursement amount on the roster record to the net disbursement amount on the roster record, and transmits a proportional net amount of the Colleague anticipated disbursement.

For more on electronic loan processing, see *Using Financial Aid: CommonLine Loan Processing*.

Xmit Coll GT Disb Roster

Set this field to “Yes”

This field is for electronic loan processing only.

If this option is selected and the Colleague anticipated disbursement amount is more than the gross disbursement amount on the roster, Colleague transmits the net disbursement amount on the roster record.

For more on electronic loan processing, see *Using Financial Aid: CommonLine Loan Processing*.

Non-Awarded Action Category

List action categories that you want Colleague to exclude from the following processing:

South Dakota Colleague System Procedures

- ①○ Exclude from award totals.
- ①○ Exclude from calculations of unmet need and unmet cost.
- ①○ Exclude from evaluation by award split logic.

You are prevented from entering an action category of “A” in this field because it is reserved for the category “accepted.” Examples of award action categories to include in this list are “D” for “denied” and “R” for “rejected.”

When you modify the annual amount for an award, the new amount is distributed only for award periods that have action categories that are not on this list. Thus, if every award period for an award has a category that is on this list then the amount cannot be redistributed.

For more information about award action codes, see “Defining Award Action Codes” 4

Note: Action categories “D” & “R” may have different meanings following the merge.

Note: Pending Financial Aid year will be changed in conjunction with FADD current year.

South Dakota Colleague System Procedures

Defining Award Categories

Responsibility: DA group

Follow the steps in below to define award categories for your institution.

Step 1 - Access the Award Category Definition (ACD) form.

Step 2 - Enter the code for the award category you want to define.

- Use the list of Datatel-recommended award category codes

Step 3 - Enter a description of the award in the Description field.

- You may need to shorten the description provided in Table 3-6.

Step 4 - In the Loan Flag field, enter **Y** if the category is for loans; enter **N** if the category is for awards other than loans.

Step 5 - Save your work on this form.

South Dakota Colleague System Procedures

Defining an Award Action Codes

Responsibility: DA group.

Follow the steps below to define award action codes for your institution.

Step 1 - Complete “Understanding Award Action Codes” 4.

Step 2 - Access the Award Action Definition (ACT) form.

Step 3 - Enter an award action code.

Step 4 - At the “Record not found — Enter (A)dd or RETURN to Reenter:” prompt, enter **A** to add the award action code.

Step 5 - Enter a description of the award action code.

Step 6 - Enter a predefined action category for this action code.

- The predefined action categories are:
 - A — accepted
 - E — estimated
 - P — pending
 - D — denied
 - R — rejected

The predefined action categories tell Colleague whether to allow transmittal to AR—only awards with an action category of A — accepted, transmit funds to AR and provide Colleague with information for fund balance calculations. You can view fund balance information for an award using the View Fund Balance (VFBL) form.

Step 7 - If you want awards with this action code to be included in Pending for AR totals, then enter **Y** in the Pending for AR field. If you do not want awards with this action code to be included in Pending for AR totals, then enter **N** in the Pending for AR field

Step 8 - Save your work on this form.

Step 9 - Repeat Step 3 through Step 8 for each additional action code you want to define.

South Dakota Colleague System Procedures

Defining Global Eligibility Criteria

Responsibility:

Timeframe:

Complete the steps below to define your global eligibility criteria.

Step 1 - Complete “Understanding Global Eligibility Criteria” .

Step 2 - Map out your rules in English-like statements.

- Use the “Global Eligibility Rules (GEC) —English Statements” worksheet.

Step 3 - Identify the data elements you need to construct the rules.

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

Step 4 - Map out your rules using rule-based processor syntax.

- Use the “Global Eligibility Rules (GEC, RLDE)” worksheet .

Step 5 - Access the GEC form.

Step 6 - If you want a student to pass global eligibility criteria only if all the listed criteria are true, then enter (**A**)nd in the Rule Connector field. If you want a student to pass global eligibility criteria if any of the criteria are true, then enter (**O**)r in the Rule Connector field.

Step 7 - If you want to use the rule-based processor to define your global eligibility criteria, then continue with Step 8. If you want to use a custom subroutine to define your global eligibility criteria, then go to the Custom Subroutine field. Continue with Step 14.

Step 8 - Enter the ID of a global eligibility rule from your completed “Global Eligibility Rules (GEC, RLDE)” worksheet. The “Record not found — Enter (A)dd or RETURN to Reenter” prompt is displayed.

Step 9 - Enter **A**.

- The Rules Definition (RLDE) form is displayed.

Step 10 - Complete the top half of the RLDE form for the rule.

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

Step 11 - Enter the rule construction statements for the rule.

- If a data element you enter requires an entry on the Rules Definition Detail (RLDT) form, the RLDT form is displayed. Use the information from the “Global Eligibility Rules (GEC, RLDE)” worksheet. Refer to *Getting Started with Colleague Student* for information about the RLDE and RLDT forms.

Step 12 - Save the rule construction statements you have entered on the RLDE form.

- The GEC form is redisplayed.

Step 13 - Repeat Step 8 through Step 12 for each rule you have defined on the “Global

South Dakota Colleague System Procedures

Eligibility Rules (GEC, RLDE)” worksheet. Continue with Step 15.

Step 14 - Enter in the Eligibility Subroutine field the name of the custom subroutine you want Colleague to call instead of using global eligibility rules. Consult your system administrator if you think your global eligibility criteria are best expressed as a custom subroutine. The online help for the Eligibility Subroutine field provides technical information about the subroutine call.

Step 15 - Save your work on the GEC form.

South Dakota Colleague System Procedures

Defining Award Codes

Responsibility:

Timeframe:

Follow the steps below to define an award code for an individual award.

Step 1 - Access the Award Definition (AWD) form.

Step 2 - Enter an award code at the Award LookUp prompt.

Step 3 - At the “Record not found — Enter (A)dd or RETURN to Reenter” prompt, enter **A**.

Step 4 - Enter a description for the award code you entered in Step 2 in the Description field.

Step 5 - Enter the appropriate destination code for the award in the Destination field. See “Destination Codes” for more information.

Step 6 - Enter the appropriate award category for this award in the Award Category field. See “Defining Award Categories” for more information.

Step 7 - Enter the appropriate award type for this award in the Award Type field.

Step 8 - Enter the default action code for this award in the Dflt Action field. See “Default Action Codes” for more information.

Step 9 - Enter a code to indicate the amount against which you want this award applied in the Need/Cost/FC field.

Step 10 - If you want to use the standard FA distribution logic for this award, then leave the Split Subr field blank. If you want to use a custom distribution subroutine to distribute (split) award amounts across award periods for this award, then enter it in the Split Subr field. See the online help for the Split Subr field for technical requirements for the custom split subroutine.

Step 11 - Enter a transmittal priority for this award in the Priority field.

Step 12 - Enter a code for the rounding type used by the distribution logic in the Distribution Type field.

Step 13 - Enter a unit of money to which you want award amounts rounded during award distribution in the Distribution Unit field.

Step 14 - Enter a code to indicate how and where to apply unallocated amounts remaining from the distribution of the award in the Distribution Apply field.

Step 15 - The Book/Allowance field is used only if a third-party bookstore interface is used with Colleague. Enter **Y** to indicate that this award is considered during the maximum book allowance during the term being processed for bookstore purchases.

South Dakota Colleague System Procedures

Step 16 - Detail on the Loan Definition field to access the Loan Award Definition (LAWD) form.

Step 17 - If this award is a **Federal Direct Loan**, then see *Using the COD Interface* for more information on Direct Loans.

- In the Direct Loan Type field, enter (**S**)tafford, (**U**)nsubsidized Stafford, or (**P**)LUS to indicate the direct loan type. Do not select this field to define a loan for transmission via the CommonLine (SM) Network.
- If this award is not a federal Direct Loan, then leave the Direct Loan Type field blank and continue with Step 18.

Step 18 - If this award is an **electronic loan**, then continue with Step 19. If this award is **not an electronic loan**, then continue with Step 27.

Step 19 - Enter the first year for electronic loan processing in the First Appl Year field. See *Using Financial Aid: CommonLine Loan Processing* for more information.

Step 20 - In the Alternative ID field, enter an alternative ID from the external organization. Use the Student Borrower field to indicate if the borrower of the alternative loan is a student or non-student. See *Using Financial Aid: CommonLine Loan Processing* for more information.

Step 21 - In the Category field, use Award Category LookUp to select the desired award category. If a value already exists, it must be deleted before a lookup can be performed.

ALERT! Do not use this field for Direct Loan processing. Use the Direct Loan Type field and leave this field blank.

Note: For alternative loans with student and non-student borrowers, you will need to establish separate award codes for each borrower type.

Step 22 - In the Student Borrower field, enter **Y** if the Borrower is a student for this Alternative Loan. If the Borrower is not a student (for example, the borrower is a parent), then enter **N**.

Step 23 - In the Fee Percent field, enter the Direct Loan fee percent associated with the Activate Date. This field is used for loans that have multiple origination rates.

Step 24 - In the Int Rbt Percent field, enter the interest rebate percent associated with the Activate Date. The interest rebate percent for Direct Loan is defined by the Department of Education. The interest rebate percentage is used to determine an upfront rebate amount for Direct Loans. This information needs to be updated annually.

Step 25 - In the Activate Date field, enter the date that the associated Fee Percent and Interest Rebate Percent begins. This date is used to determine which Fee Percent and Interest Rebate Percent are used in calculations.

Step 26 - Save and finish from the LAWD form to save your changes. You are returned to the AWD form at the GL Account field.

Step 27 - If this award is not a Destination 1, 6, or 7 award, continue with Step 30.

South Dakota Colleague System Procedures

- If this award is a Destination 1, 6, or 7 award then enter the GL account number designated as the fund for this award in the GL Account field. The description of the GL number displays in the field below.
- The GL account number posts a credit to the General Ledger for any amount transmitted to Accounts Receivable. This field is required for all destination 1, 6, and 7 awards, and is valid only for these types of awards.

Note: When entering a successive group of Fee Percent, Interest Rebate Percent, and the Activate Date associated with both, you must enter them in chronological order from the oldest date to the newest. Colleague compares the disbursement dates for the loan with the dates you enter in the Activate Date field to determine the appropriate fee percent and interest rebate percent for the loan.

Step 28 - Enter the AR type for this award in the AR Type field.

Step 29 - If this award is not a Destination 7 award, continue with Step 30. If this award is a Destination 7 award, then enter **Y** in the Xmit Excess field to allow transmittal of excess funds.

Step 30 - For Destination 2 or 4 awards, in the Sponsored field, enter **Y** if this award is a sponsored award.

- If you enter **Y** in this field, then this award code may be specified as a sponsored award by entering the award code in the FA Award Code field on the Sponsored Students (SPST) form.

Step 31 - In the TIV Category field, enter a TIV category for use in Return of Title IV Funds processing performed by the Calculate Return of Funds (ROFC) form. You must enter a TIV category on this form for each of your institution's Title IV award funds.

Step 32 - To view yearly budget information for this award code, scroll through the lines of Yearly Budgets group.

- To edit the Budget Amount or Max Budget Amount for a given year, detail on the Year field. Colleague displays a budget form based on the number of FA offices at your institution. For a single FA office, Colleague displays the Office Fund Balance (OFBL) form. For multiple FA offices, Colleague displays the summary form FA Budget By Office (FBBO) form. Continue with "Defining Fund Budgets".
- To define eligibility criteria for this award, detail on the Elig field to access the Award Eligibility Criteria (AEC) form. Continue with "Defining Award Eligibility Criteria".
- To define the amount that an individual can receive from this award fund, detail on the Amount field to access the Award Amount Definition (AAD) form. Continue with "Defining Award Amounts".
- For Destination 1, 6, and 7 awards, to define transmittal limitations, detail on the Xmit field to access the Award AR Xmit Limitations (AAXL) form.
- Continue with "Defining Award Transmittal Limitations".
- To enter unlimited comments for this award, detail on the Comments field to access the Award Comments (UTED) form.
- Enter information for use in automatically packaging this award, detail on the Packaging field to access the Award Packaging (APAC) form. See the "Automatic Packaging" part of this manual beginning for more information.

Step 33 - Save your work on the AWD form.

South Dakota Colleague System Procedures

Defining Award Eligibility Criteria

Responsibility:

Timeframe:

Complete the steps below to define your award eligibility criteria.

Step 1 - Map out your rules in English-like statements. Use the “Award Eligibility Rules (AEC) —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 “Award Eligibility Rules (AEC, RLDE)” worksheet 3.

Step 4 - Access the Award Eligibility Criteria (AEC) form.

Step 5 - In the Rule Connector field, enter **A – And** if you want a student to pass award eligibility criteria only if all the listed criteria are true. In the Rule Connector field, enter **O – Or** if you want a student to pass award eligibility criteria if any of the criteria are true.

Step 6 - If you want to use the rule-based processor to define your award eligibility criteria, continue with Step 7. If you want to use a custom subroutine to define your award eligibility criteria go to the Custom Subroutine field.

- Consult your system administrator if you think your award eligibility criteria are best expressed as a custom subroutine. Continue with Step 13.

Step 7 - Enter the ID of an award eligibility rule from your completed “Award Eligibility Rules (AEC, RLDE)” worksheet. The “Record not found — Enter (A)dd or RETURN to Reenter” prompt is displayed.

- **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 construction statements. Use the information from the “Award Eligibility Rules (AEC, RLDE)” worksheet. Refer to *Getting Started with Colleague Student* for information about the RLDE form.

Step 11 - Save the rule.

- The AEC form is redisplayed.

Step 12 - Repeat Step 7 through Step 11 for each rule you have defined on the “Award Eligibility Rules (AEC, RLDE)” worksheet. Continue with Step 14.

Step 13 - Enter in the Eligibility Subroutine field the name of the custom subroutine you want Colleague to call instead of using award eligibility rules.

South Dakota Colleague System Procedures

Step 14 - Save your work on the AEC form.

South Dakota Colleague System Procedures

Defining a Default Award Amount

Responsibility:

Timeframe:

Complete the steps below to define a default award amount for a given award.

Step 1 - Access the Award Amount Definition (AAD) form.

Step 2 - Enter the ID of the award for which you want to define a default amount. Use LookUp to help you find the award that you need.

Step 3 - If you want to assign the same dollar amount to each student who receives the award, enter the dollar amount in the Fixed Award Amount field. Continue with Step 15.

- If you want to calculate the full-time entitlement for the Pell Grant, enter S.FA.PELL.AWD in the Award Amount Subroutine. For this subroutine to work, the student must have a need analysis record on file, must have a Pell budget, and must be Pell eligible. Continue with Step 15.
- If you want to use a custom subroutine to calculate a default award amount, continue with Step 14.
- If you want to use the rules processor to create rules to calculate default award amounts, continue with Step 4.

Step 4 - Map out your rules in English-like statements. Use the “Award Amount Definition Rules (AAD) —English Statements” worksheet 5.

Step 5 - Identify the data elements you need to construct the rules. Work with your system administrator to identify these data elements.

Step 6 - Map out your rules using rule-based processor syntax.

Note: You can change the award amount for the student at any time on the Award Detail Entry (AIDE) form. Use the “Defining Default Award Amounts (AAD, RLDE)” worksheet.

Step 7 - Enter the ID of an amount definition rule from your completed “Defining Default Award Amounts (AAD, RLDE)”. The “Record not found--Reenter or Add” window is displayed. Click on OK to enter or Add to add.

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 “Defining Default Award Amounts (AAD, RLDE)” worksheet. Refer to *Getting Started with Colleague Student* for information about the RLDE form.

Step 11 - Save the rule.

- The AAD form is redisplayed with your cursor in the Amount field.

South Dakota Colleague System Procedures

Step 12 - Enter the default dollar amount to use when the rules for this rule table ID are true in the Amount field.

Step 13 - Repeat Step 7 through Step 12 for each rule table ID you have defined on the “Defining Default Award Amounts (AAD, RLDE)” worksheet. Continue with Step 15.

Step 14 - Enter in the Award Amount Subroutine field the name of the custom subroutine you want Colleague to call.

Step 15 - Save your work on the AAD form.

South Dakota Colleague System Procedures

Defining Transmittal Limitations for a Destination 1, 6, or 7 Award

Responsibility:

Timeframe:

Follow the steps below to define transmittal limitations for Destination 1, 6, or 7 awards.

Step 1 - Access the Award AR Xmit Limitations (AAXL) form.

Step 2 - If this award is a Destination 1 or 6 award, continue with Step 8. If this award is a Destination 7 award, continue with Step 3.

Step 3 - If you want to limit payment of this Destination 7 award using:

- ⓪ Eligibility rules, continue with Step 4.
- ⓪ Amount limit rules, continue with Step 5.
- ⓪ AR Category, continue with Step 6.
- ⓪ AR Code, continue with Step 7.
- ⓪ Transmittal subroutine, continue with Step 8.

Step 4 - To limit payment of a Destination 7 award using charge eligibility rules do the following:

- a. Enter a rule ID in the Charge Eligibility Rule field. The Rules Definition (RLDE) form is displayed.
- b. Enter the rule construction statements for the rule on the RLDE form.
- c. Save your work on the RLDE form. The AAXL form is redisplayed.
- d. Repeat this step to define any additional charge eligibility rules.
- e. Return to Step 3 to define additional transmittal limitations or save your work on the AAXL form.

Step 5 - To limit payment of a Destination 7 award using amount limit rules do the following:

- a. Enter a rule ID in the Amount Limit Rule field. The Rules Definition (RLDE) form is displayed.
- b. Enter the rule construction statements for the rule on the RLDE form.
- c. Save your work on the RLDE form. The AAXL form is redisplayed.
- d. Enter the percent of the charge to pay when the rule is true. The default for this field is 100 percent.
- e. Repeat this step to define any additional amount limit rules.
- f. Return to Step 3 to define additional transmittal limitations or save your work on the AAXL form.

Step 6 - To limit payment of a Destination 7 award by AR category do the following:

- a. Enter an AR Category to use to restrict payment of this award in the AR Category field. Use LookUp to find the AR category that you need.
- b. Enter the percentage of the charge to pay when the AR category on this line matches an AR category associated with the charge. The default for this field is 100 percent.
- c. Enter the percentage limit to pay on this AR Category in the Pct Limit field. For example, to limit payment to 75 percent of the charge for this AR category, enter **75**.
- d. Enter this award's amount limit for charges for this AR Category in the Amount Limit field.

South Dakota Colleague System Procedures

- e. Repeat this step to define any additional AR category limitations.
- f. Return to Step 3 to define additional transmittal limitations or save your work on the AAXL form.

- Step 7** - To limit payment of a Destination 7 award using an AR code do the following:
- a. Enter an AR Code to use to restrict payment of this award in the AR Code field.
 - b. Enter the percentage of the charge to pay when the AR code on this line matches an AR code associated with the charge.
 - c. Enter the percentage limit to pay for this AR code in the Pct Limit field. For example, to limit payment to 75 percent of the charge for this AR code, enter **75**.
 - d. Enter this award's amount limit for charges for this AR code in the Amount Limit field.
 - e. Repeat this step to define any additional AR code limitations.
 - f. Return to Step 3 to define additional transmittal limitations or save your work on the AAXL form.

- Step 8** - To limit payment of a Destination 7 award using a subroutine do the following:
- a. Enter a Datatel-provided or custom subroutine to limit payment of the award.
 - b. Consult your system administrator if you think you require a custom subroutine to limit payment of this award.

- Step 9** - Save your work on the AAXL form.

South Dakota Colleague System Procedures

Checklist for Defining the Pell Award

Responsibility:

Timeframe:

Follow the steps below to define your institution's Pell award.

Step 1 - Use the Award Category Definition (ACD) form to define an award category of Pell. See "Defining Award Categories".

Step 2 - Use the Award Code Definition (AWD) form to define a Pell award code. See "Defining Award Codes".

Step 3 - Enter S.FA.PELL.AWD in the Award Amount Subroutine field on the Award Amount Definition (AAD) form. Colleague uses this Datatel-delivered subroutine along with the yearly Pell entitlement figures on the Pell Entitlement (PEF) form to calculate the student's Pell award.

Step 4 - Enter PELL.SUBR in the Transmittal Subroutine field on the Award AR Xmit Limitations (AAXL) form. See "Defining Award Transmittal Limitations".

Step 5 - If you want to do next year's award estimations before the final regulatory release of the software is delivered, enter yearly information from the appropriate Dear Colleague letter on the Pell Entitlement Figures (PEF) form. See "Defining Pell Entitlements".

Step 6 - On the Budget Component Definition (SBCD) form, enter whether budget components are to be used in a less than half time Pell calculation or used for alternate Pell cost of attendance (tuition, dependent care, and disability expense). See *Using Financial Aid: Need Analysis*, Part 8: Setting Up Student Budgets, "Procedure for Defining Budget Components" for more information.

South Dakota Colleague System Procedures

Defining Award Periods

Responsibility: Ris

Timeframe: once yearly

Follow the steps below to define award periods for a specific year.

Step 1 - Access the Award Period Definition (AWPD) form.

Step 2 - At the Award Period LookUp prompt, enter a code for the award period that you want to define. So you can easily pick the code you need from a resolution list, ensure that the code adequately identifies the award period. For example, you might represent the 2001/02 academic year with the following award period codes: O1/FA, 02/WI, 02/SPR,02/SU1, 02SU2.

Step 3 - In the Description field, enter a description for the award period code.

Step 4 - In the Start Date field, enter a start date for the award period in the format specified by your institution.

Step 5 - In the End Date field, enter an end date for the award period in the format specified by your institution.

Step 6 - In the Length of Period field, enter the length of the award period in hours, days, weeks, class meetings, or another time increment appropriate for your institution.

Step 7 - In the Comments field, enter any comments about this award period.

Step 8 - Enter in the Closed Days group the Start Date and End Date for periods of five or more consecutive days that your institution will be closed during this award period.

Step 9 - Enter one or more academic terms to include in this award period.

Step 10 - In the FA Year field, enter the academic years for which this award period is valid.

Step 11 - Enter the earliest date for transmittal of excess Destination 7 funds on the D7 Xmit Excess Date field.

Step 12 - In the Award Category field, enter an award category with a different Destination 7 excess transmittal date than the date you entered in Step 11.

Step 13 - In the D7 Excess Xmit Date field, enter a date for transmittal of D7 Excess for the award category you entered in Step 12.

Step 14 - Enter free-form comments about the award period.

- You can detail to the UTED form to enter comments.

Step 15 - Save your work on the AWPD form.

Note: You must create a file suite for a year for it to be available for selection here. See Getting Started with Colleague Student for more information on Financial Aid file suites.

South Dakota Colleague System Procedures

Defining Attendance Patterns

Responsibility: RIS

Timeframe: once yearly

Follow the steps below to define your institution's attendance pattern codes.

Step 1 - Complete the "Attendance Pattern Definition (ATPC)" worksheet.

- Use the master list of attendance codes you created in Step 10 of "Procedure for Defining Attendance Patterns" 6.

Step 2 - Access the Attendance Pattern Definition (ATPC) form.

Step 3 - Enter the data from the "Attendance Pattern Definition (ATPC)" worksheet for the attendance pattern code.

Step 4 - Save your work on the ATPC form.

Step 5 - Repeat Step 3 and Step 4 to define your remaining attendance pattern codes.

South Dakota Colleague System Procedures

Defining Attendance Pattern Rules

Responsibility: RIS

Timeframe: once yearly

Follow the steps below to define rules to assign attendance patterns to students.

Step 1 - Access the Attendance Pattern Rule Table (PATR) form.

Step 2 - At the first prompt, enter the academic year for which you want to define rules to assign attendance patterns.

Step 3 - At the second prompt, enter a Rule Table ID.

Step 4 - If you want to assign a single default attendance pattern to all students, enter the attendance pattern code in the Default Attendance Pattern field. Continue with Step 17.

- If you want to use rules to assign attendance patterns to students, continue with Step 5.
- If you want to use a custom subroutine to assign attendance patterns to students, continue with Step 15.

Step 5 - Map out your rules in English-like statements. Use the “Attendance Pattern Assignment Rules (PATR) —English Statements” worksheet.

Step 6 - Identify the data elements you need to construct the rules.

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

Step 7 - Map out your rules using rule-based processor syntax. Use the “Defining Attendance Pattern Assignment Rules (PATR, RLDE)” worksheet.

Step 8 - Enter the ID of a rule from your completed “Defining Attendance Pattern Assignment Rules (PATR, RLDE)” worksheet. The “Record not found — Enter (A)dd or RETURN to Reenter” prompt is displayed.

Step 9 - Enter **A**.

- The Rules Definition (RLDE) form is displayed.

Step 10 - Complete the top half of the RLDE form for the rule.

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

Step 11 - Enter the rule.

- Use the information from the “Defining Attendance Pattern Assignment Rules (PATR, RLDE)” worksheet. Refer to *Getting Started with Colleague Student* for information about the RLDE form.

Step 12 - Save the rule.

- The PATR form is redisplayed.

Step 13 - In the Attendance Pattern field, enter the attendance pattern code to assign when this rule is true.

South Dakota Colleague System Procedures

Step 14 - Repeat Step 8 through Step 13 for each rule you have defined on the “Defining Attendance Pattern Assignment Rules (PATR, RLDE)” worksheet. Continue with Step 16.

Step 15 - In the Attendance Pattern Subroutine field, enter the name of the custom subroutine you want Colleague to call.

Step 16 - In the Default Attendance Pattern field, enter an attendance pattern code that you want assigned as a default if rules or a subroutine do not assign an attendance pattern code.

- The code you enter in this field is assigned as a “last resort” if rules or a subroutine do not assign an attendance pattern.
- If you have an entry in either the Rule field or Attendance Pattern Subroutine field, an entry in this field is required.

Step 17 - Save your work on the PATR form.

Step 18 - Test the rules and codes you have defined by allowing Colleague to automatically assign attendance patterns to a group of test students by completing one of the following tasks:

- ①○ Access a test student record on the AIDE form.
- ①○ Detail on the Calc Attendance Pattern field on the Student Attendance Pattern (SATP) form to automatically assign attendance patterns.
- ①○ Run the Automatic Packaging (XPKR) form in simulation.

South Dakota Colleague System Procedures

Viewing Funds for an Award

Responsibility:

Timeframe:

Use the View Fund Balances (VFBL) form to view the status of funds for a particular award. Colleague displays the totals for all FA offices for which funds are budgeted from this award fund. The offices are listed in the Office group on the VFBL form.

For the specified award, the VFBL form displays:

- ①○ The default General Ledger (GL) number and Account Receivable (AR) type as defined on the Award Definition (AWD) form.
- ①○ The distribution of awarded funds by action category (Fund Distributions).
- ①○ The total funds awarded (Total Award Used).
- ①○ The total amount budgeted not including overaward allowance (Budgeted Amount).
- ①○ Total amount of overaward allowed (Overaward Amount).
- ①○ Total amount budgeted including overaward allowance (Maximum Budget).
- ①○ The total funds remaining out of the total amount budgeted including overaward allowance (Remaining Balance).
- ①○ The total transmitted funds from TA.ACYR (Transmitted Amount). To view or edit fund information for a particular FA office, detail on the desired office in the Offices group. Colleague displays the Office Fund Balance (OFBL) form. For more information on the OFBL form, see “Defining Fund Budgets”.

Note: The GL number and AR type for a particular office may be different from the default GL number and AR type for the fund. The default GL number and AR type are defined on the Award Definition (AWD) form. Office-specific GL numbers and AR types are defined on the Office Fund Balances (OFBL) form.

South Dakota Colleague System Procedures

Defining Award Fund Budgets Across Multiple FA Offices

Responsibility:

Timeframe:

Follow the steps below to define an award fund budget across multiple FA offices.

Step 1 - Access the Award Definition (AWD) form.

Step 2 - Enter the award code.

Step 3 - Detail on the Year field in the Yearly Budget group.

- The FA Budget by Office (FBBO) form is displayed.

Step 4 - Enter the office code for the FA office for which you want to budget funds for this award.

Step 5 - Enter an amount in the Budgeted Amount field.

Step 6 - Enter the percentage in the Percent Over field if you want to overaward using a percentage. The budgeted amount plus the percentage amount are used to calculate the maximum budget amount.

- Enter the amount in the Amount Over field if you want to overaward using an amount. The budgeted amount plus the amount over are used to calculate the maximum budget amount.

Step 7 - If this award is Destination 1, 6, or 7, detail to enter additional fund budget data for this office or to view fund distribution amounts by category, information about remaining balance, and transmitted amounts on the OFBL form. Continue with Step 8.

- If this award is a Destination 2, 3, or 5, detail to view fund distribution amounts by category and information about remaining balance, or continue with Step 12.

Step 8 - In the GL No field, enter a GL account number for this office fund budget. If the account number you enter here differs from the account number entered on the AWD form, the account number you enter here controls for this office.

Step 9 - In the AR Ty field, enter an AR Type for this office fund budget. If the AR Type you enter here differs from the AR Type entered in the AWD form, the AR Type you enter here controls for this office.

Step 10 - Save your work on the OFBL form.

- The FBBO form is displayed.

Step 11 - Repeat Step 4 through Step 10 for each office for which you want to define a fund budget.

Step 12 - Save your work on the FBBO form.

- The AWD form is displayed.

Step 13 - Save your work on the AWD form.

South Dakota Colleague System Procedures

Defining a Fund Budget for a Single FA Office

Responsibility:

Timeframe:

Follow the steps below to enter a fund budget for a single FA office.

Step 1 - Access the Award Definition (AWD) form.

Step 2 - Enter the award code.

Step 3 - Detail on the Year field in the Yearly Budget group.

- The FA Office Fund Balance (OFBL) form is displayed.

Step 4 - In the Budgeted Amount field, enter the amount to budget for the fund.

Step 5 - If you want to overaward using an amount, enter the amount in the Overaward Amount field. The Budgeted Amount plus the Overaward Amount are used to calculate the Maximum Budget amount.

- If you want to overaward using a percentage, enter the percentage in the Overaward Pct field. The Budgeted Amount plus the Overaward Pct are used to calculate the Maximum Budget amount.

Step 6 - Save your work on this form.

- The AWD form is redisplayed.

Step 7 - Save your work on the AWD form.

South Dakota Colleague System Procedures

Keeping Fund Balances Accurate

Responsibility: RIS

Timeframe: weekly

Use the Rebuild Fund/Office Balances (RFBL) form to have Colleague re-evaluate and rebuild fund balances for all award funds and FA offices.

You should run this process periodically to make sure your balances are accurate, or whenever a fund balance displayed on the following forms appears to be incorrect:

- ①○ View Fund Balances (VFBL) form
- ①○ FA Budget by Office (FBBO) form
- ①○ Office Fund Balance (OFBL) form

You can also have Colleague rebuild broken links between the TC.ACYR and TA.ACYR files.

South Dakota Colleague System Procedures

Defining Pell Yearly Entitlement Figures

Responsibility:

Timeframe:

Follow the steps below to define your institution's yearly Pell Entitlement figures as published in the Department of Education's annual *Dear Colleague* letter.

Step 1 - Access the Pell Entitlement Figures (PEF) form for the appropriate year.

Step 2 - Enter the number of the Pell Entitlement Option to use for this year as specified in the Department of Education's *Dear Colleague* letter.

Step 3 - Enter an amount in the Minimum Amount field.

Step 4 - Enter an amount in the Maximum Amount field.

Step 5 - Enter the percentage of cost of attendance that is covered by the Pell Grant at your institution.

Step 6 - In the Max Tuition Exp field, enter the amount that the student's alternate Pell expenses must be less than. The combination of the student's tuition, dependent care, and disability-related expenses must be less than the amount entered here.

Step 7 - In the Max EFC Value field, enter the maximum EFC value that the student can have in order to have their Pell entitlement calculated using the alternate Pell Grant schedule.

Step 8 - In the Min Cost of Attendance field, enter the minimum amount of the student's Cost of Attendance that is needed in order to have their Pell entitlement calculated using the alternate Pell Grant schedule.

Step 9 - If you selected Full Funding in Step 2, continue with Step 10. If you selected Linear Scheduled Reduction in Step 2, enter the Y-intercept, Slope, and Minimum Award. Continue with Step 10. If you selected Full Funding/Flat Reduction in Step 2, enter the reduction amount in the Flat Reduction Amt field. Continue with Step 10.

Step 10 - Save your work on this form.

South Dakota Colleague System Procedures

Resetting Students' Federal, Institutional, and Pell Flags

Responsibility:

Timeframe:

To reset students' Federal, Institutional, and Pell flags to the defaults set on the FA Default Definition (FADD) form, follow the steps below.

Step 1 - Access the Reset Flagged Results (RFLG) form.

Step 2 - Enter the academic year for which you want to reset flags.

Step 3 - In the Input Saved List Name field, enter the saved list name containing record IDs you would like to process, or in the Students field, enter names or other identifying data of students to process, or use LookUp.

Step 4 - In the Additional Selection Criteria field, enter Y to specify additional selection criteria. 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 5 - Save and exit from the RFLG form.

South Dakota Colleague System Procedures

Defining FA Reg Credit Parameters

Responsibility: RIS

Follow the steps below to define FA registration credit parameters.

Step 1 - Access the FA Reg Credit Parameters (FRCP) form.

Step 2 - In the Include Acad Levels field, enter codes for the academic levels that you want included in registration credit totals. Use LookUp to find the codes that you need.

Step 3 - In the Include Credit Types field, enter codes for the credit types that you want included in registration credit totals.

Step 4 - Enter rules for including or excluding courses in calculations of total registration credits for financial aid.

Step 5 - Enter a code in the Audit Selection Code field.

Step 6 - Enter the number of the census date upon which you want to base inclusion of courses for calculations of registration credit totals.

- If the number of the census date you specify is greater than the number of census dates specified for a term, then the last census date is used. If you leave this field blank, then the most recent status of the course is used.

Step 7 - Save your work on the FRCP form.

South Dakota Colleague System Procedures

Setting Up Federal Pell Grants

Responsibility:

Timeframe:

In addition to the setup tasks for setting up automatic packaging, follow the steps below to set up those award funds that represent the Federal Pell Grant program.

1. Ensure the Pell cost of attendance is being calculated for appropriate applicants by calculating rule-based budgets using either the Batch Budget Assignment (SBGT) form.

Also, make certain that, on the Budget Component Definition (SBCD) form, budget components are defined as to whether or not they will be included when determining less than half time Pell cost of attendance or included for alternate Pell cost of attendance. See *Using Financial Aid: Need Analysis* for more information.

2. Ensure that Pell award disbursement codes for award processing are defined on the Award Disb Code Maintenance (ADCM) form.

3. Complete all Pell fields on the Attendance Pattern (ATPC) form for each of the attendance patterns defined at your institution.

In the Pell Disbursement Code field, enter the disbursement code to be used that was defined on the Award Disb Code Maintenance (ADCM) form. Entering data in Pell fields on the ATPC form ensures that all future assignments of these attendance patterns reflect Pell data.

4. To set up attendance patterns that have already been assigned to students, choose from one of two options:

- Recalculate the student's attendance pattern when you automatically package the student by entering Υ in the Recalculate Attendance Patterns field on the Packaging Definition (PKDF) form.

OR

- Manually enter the Pell data in the appropriate fields on the Student Attendance Pattern (SATP) form for each Pell-eligible student. The method you choose to populate Pell fields on already-assigned student attendance patterns depends on the number of students affected and the amount of overrides already present on their attendance pattern.

5. Create a Packaging category for the Pell award.

6. Create Pell AWARDS records using the Award Definition (AWD) form and associate them to your Pell Awarding Category (ACD) for "PELL." If necessary, create an additional Pell award fund for use with Pell formulas 4 and 5 for manual awarding using the Award Detail Entry (AIDE) form. You have the option to create a custom Pell subroutine for formulas 4 and 5 based on the Datatel provided subroutine S.FA.PKG.AMT.PELL.

7. On the AWD form, detail on the Packaging Info field to the APAC form. Enter the Pell Packaging Category (defined on APCD) in the Packaging Category field.

8. Associate S.FA.PKG.AMT.PELL as a packaging amount subroutine on the Pell packaging category or on each valid Pell award fund by doing the following:

Create a PELLAMT rule table ID for use in restricting the amount of all Pell awards using the PARL form. Enter S.FA.PKG.AMT.PELL in the Amount Subroutine field and finish from the PARL form to create the PELLAMT rule table ID. For a Pell packaging category of awards, on the APCD form, enter PELLAMT in the Award Amount Restrictions field.

OR

For a specific Pell award fund, enter PELLAMT in the Amount Restrictions field on the APAC form.

South Dakota Colleague System Procedures

Setting Up FFELP and Federal Direct Loan Award Amounts

Responsibility: Central

Timeframe: once yearly

In addition to the general steps defined in Table 4-2 for setting up automatic packaging, follow the steps below to setup award funds which represent FFELP and Federal Direct Student Loans.

Step 1 - Establish the rule for determining students' Year in College using the Packaging Year in College Rules (PYRL) form. See online help for the PYRL form for suggestions about which data elements to use to create a year in college.

Step 2 - Enter a rule table ID in the Year in College Rule (PYRL) on the Packaging Definition (PKDF) form. The PKDF form uses the value calculated by the rule table to determine loan limits.

Six smart coded rules have been written:

- BFYRINCOL YEAR IN COLLEGE
- DFYRINCOL 03-04 Year in College Rule
- MFYRINCOL Year in College Rule
- NFYRINCOL Year in College Rule
- SFYRINCOL Year in College Rule for Packaging
- UFYRINCOL Year in College Rule

Step 3 - Create the GSL award category for subsidized loans on the Award Category Definition (ACD) form.

Step 4 - Create the USTF award category for unsubsidized loans on the Award Category Definition (ACD) form.

Step 5 - Associate the GSL award category to each subsidized loan award fund on the Award Definition (AWD) form by entering GSL in the Category field.

Step 6 - Associate the USTF award category to each unsubsidized loan award fund on the Award Definition (AWD) form by entering USTF in the Category field.

Step 7 - Create a rule table ID, FFELPAMT, on the Packaging Amount Rules form and enter S.FA.PKG.AMT.FFELP in the Amount Subroutine field. This rule table ID can be used with any number of award funds. The S.FA.PKG.AMT.FFELP subroutine must be entered in the Amount Restrictions field on the APAC form for each FFELP/Direct Loan award for the subroutine to function correctly.

Step 8 - Enter the FFELPAMT rule table ID in the Amount Restrictions field on the Award Packaging (APAC) form.

South Dakota Colleague System Procedures

Setting Up Federal Supplemental Educational Opportunity Grant (FSEOG)

Responsibility:

Timeframe:

There are no special subroutines required for Federal Supplemental Educational Opportunity Grant (FSEOG) processing. Because federal regulations specify that FSEOG should first be awarded to students with the lowest family contributions who will also receive Federal Pell Grants, you should structure your eligibility rules to check for this condition.

The SA.ACYR file contains data fields that are built by automatic packaging with the intent to access them in rules. One of these elements, SA.PKG.AWARDS, keeps track of the awards that packaging is currently building. You can use this data element in an eligibility restriction rule for the FSEOG award fund (create the rule table ID on the Packaging Eligibility Rules [PERL] form and enter the rule table ID in the Eligibility Restrictions field on the APAC form) to determine if the student is being awarded a Federal Pell Grant. A sample FSEOG eligibility restriction follows:

Eligibility Criteria

You will also need to establish an amount restriction rule for the FSEOG award fund (On the APAC form, detail on the Amount Restrictions field to access Packaging Amount Rules [PARL] form). Define this rule according to your institutional packaging policy.

SA.PKG.AWARDS EQ 'PELL'

South Dakota Colleague System Procedures

Setting Up Federal Perkins Loans

Responsibility:

Timeframe:

There are no special subroutines for the Federal Perkins Loan Program. Federal regulations require priority to those students with exceptional financial need as defined by your institution. Express this requirement as an eligibility restriction rule (on the APAC form, detail from the Eligibility Restrictions field to the PERL form to define the rule table ID) associated to your Federal Perkins award fund.

Federal Regulations also specify the maximum annual amount an eligible student may borrow and the maximum cumulative amount a student may borrow. Indicate the annual maximum as an amount restriction rule (by detailing on the Amount Restrictions field on the APAC form to the PARL form) associated to your Federal Perkins award fund. If your institution is at risk for exceeding the cumulative maximum amounts, a custom amount restriction subroutine is required.

South Dakota Colleague System Procedures

Setting Up Federal Work Study

Responsibility:

Timeframe:

There are no special subroutines required for Federal Work Study. Establish your eligibility restrictions and amount restrictions associated to your Federal Work Study award fund on the APAC form or packaging category (on the APCD form).

If your institutional packaging policy places a different priority on work study for various packaging groups (for example, if returning students are given preference), establish multiple work study award funds with different priorities. Write the eligibility restrictions for the award funds to reference the appropriate packaging groups.

South Dakota Colleague System Procedures

Packaging on the Basis of Last Year's Percentage

Responsibility:

Timeframe:

Use the SA.LAST.YR.AWD.PCT virtual field in your cost gift percent rule or need gift percent rule (defined on the Packaging Percent Rules [PCTR] form). The virtual field provides the percent of last year's package that was gift aid. If your packaging policies attempt to package returning students on the same percent of gift aid this year as was packaged last year, this virtual field can be used to approximate that value. The virtual field also serves as a model for your system administrator to develop a similar virtual field that would more closely match your institution's specific packaging policies for returning students.

The following example demonstrates the use of this virtual field in need gift percent rules. In this undergraduate institution example, two packaging groups have been established for new students while returning students are awarded on the basis of last year's percentage. The new student packaging groups are NEWFR (new freshmen) and NEWTR (new transfers) and the default packaging group being used is NEWFR.

South Dakota Colleague System Procedures

Packaging Percent Rules

Responsibility:

Timeframe:

Use the Packaging Percent Rules (PCTR) form to define a rule table ID that calculates a percentage to be used in automatic packaging processing. For any rule table ID that you define using this form, you can choose from the following methods for calculating percentages:

- ①○ **Default Percent/Weight.** This field is required. If you opt to use rules or a subroutine to calculate percentages, the percentage you enter in this field is defaulted as a “last resort” only when the rules or the subroutine do not calculate an amount. You can also use the Default Percent/Weight field alone to default a single percentage for all fields that use this rule table ID.
- ①○ **Percent Rules.** Calculate a percentage based on rules that you associate with a rule table ID. If the rules that you specify do not calculate a percentage, the amount that you entered in the Default Percent/Weight field is defaulted.
- ①○ **Percent/Weight Subroutine.** Calculates a percentage using a subroutine developed by your institution for this purpose. If the subroutine does not calculate a percentage, the amount that you entered in the Default Percent/ Weight field is defaulted.

Use the PCTR form to enter percent rules. The result of the first rule that evaluates true will be assigned as the result of the rule table.

South Dakota Colleague System Procedures

Putting Your Automatic Packaging Strategy on Paper

Responsibility:

Timeframe:

Putting your institution's packaging policy on paper consists of completing the sub procedures listed below to complete the necessary packaging worksheets.

1. Define attendance patterns and define rules to automatically assign them to students the first time a student's record is accessed using the Award Detail Entry (AIDE) form or the first time a student's aid is automatically packaged. "Setting Up Attendance Patterns". "Attendance Pattern Definition (ATPC)" "Attendance Pattern Rule (PATR) Rule Construction Translation"
2. Define global packaging parameters to use for an entire packaging run rather than a specific packaging category or a specific award. "Packaging Definition (PKDF)"
3. Group students with similar characteristics into packaging groups by creating the groups and creating rules to assign them to students. "Procedure for Planning Packaging Groups of Students"
4. Define rules to assign a year in college value to students for Federal Family Educational Loan Program (FFELP) awards and for use in other rules. "Packaging Year in College Rule (PYRL) Rule Construction Translation"
5. Group award funds that you want treated similarly by automatic packaging processing into packaging categories of awards.

Note: Each packaging award that you define must belong to a packaging category, even if it is the only award in that packaging category. "Package Category Detail (APCD)" "Packaging Category Award List" "Procedure for Planning Packaging Categories of Award Funds"

6. Create rules for award eligibility, amount calculations, amount restrictions, campus-based or institutional designations, to associate with each packaging category. "Packaging Eligibility Rule (PERL) Rule Construction Translation" "Packaging Amount Rule (PARL) Rule Construction Translation" "Packaging Percent Rule (PCTR) Rule Construction Translation"

7. Note the exceptions for awards that have characteristics that are exceptions to the packaging category to which they belong. "Defining Awards Parameters for Use in Automatic Packaging" "Award Packaging (APAC)"

Planning Packaging Groups of Students

Follow the steps in Table 4-9 to group your students into packaging groups for use in automatic packaging.

1. Categorize your student population into packaging groups. "Packaging Group Code Master List"
2. Define rules, a subroutine, or a default value to assign students to each packaging group. "Packaging Group Rule (PGRL) Rule Construction Translation"

Planning Packaging Categories of Award Funds

Follow the steps in Table 4-10 to plan your institution's packaging categories of award funds and to associate rules for their use in automatic packaging processing.

1. Categorize your award funds in packaging categories (group similar funds). "Package Category Detail (APCD)" "Package Category Detail (APCD)"
2. Plan your entries for the following required fields:
 - Priority
 - Gift/Self
 - Round Type

South Dakota Colleague System Procedures

- Round Units
- Allow Increases
- CB/Inst Rules

“Packaging CB/Inst Rule (PCRL) Rule Construction Translation”

3. Define eligibility rules (the criteria for a student to receive an award from this package category).
“Packaging Eligibility Rule (PERL) Rule Construction Translation”

4. Define Award Amount Rules (specify the criteria to use to calculate an award amount for this packaging category). “Packaging Amount Rule (PARL) Rule Construction Translation”

5. Specify rules for minimum award amounts for this package category. “Packaging Amount Rule (PARL) Rule Construction Translation”

6. Specify rules for maximum from this category amounts.

Defining Awards Parameters for Use in Automatic Packaging

Follow the steps to define awards for automatic packaging processing.

1. For each award fund, plan an entry for the following required fields:
 - a code in the Packaging Category field
 - assign the award a priority within the category in the Priority field
 - **Y** or **N** in the Use Eligibility Criteria field “Package Category Detail (APCD)” .

2. Write a **Y** or an **N** in the Allow Package Increases field:

Note: If the following conditions are met:

- this term award exists in the student's base package
- this field (either on the Packaging Category Detail APCD form or on this form contains a **Y**,
- this term award is listed in the Include Previous Term Awards with the Following Statuses field on the PKDF form then the Automatic Packaging (PKCR) form increases the term amounts for an existing award. If the Allow Packaging Increases field on APCD form contains an **N** or is blank, you can enter **Y** in this field to override the packaging category value for this award. “Award Packaging (APAC)”.

3. Write a **Y** or an **N** in the Freeze Award field.

Note: If the Freeze Category field on the APCD form is empty or contains an **N**, the PKCR form checks for an override in this field. If the Freeze Category on the APCD field contains a **Y**, you cannot override the **Y** for an individual award in this field. “Award Packaging (APAC)”.

4. Define eligibility restrictions that are in addition to those specified for the packaging category.

Note: Eligibility restrictions are cumulative in effect. If you have already defined award-level eligibility criteria using the Award Eligibility Criteria (AEC) form, the automatic packager applies the AEC criteria if you enter **Y** in the Eligibility Criteria field on the APAC form. If you have defined eligibility criteria using the AEC form and you also enter a rule ID for additional eligibility criteria in the Eligibility Restrictions field on the APAC form, the student must pass the criteria specified in both places to receive the award. If you have defined eligibility criteria at the packaging category level as well, the student must pass all three. “Award Packaging (APAC)” “Packaging Eligibility Rule (PERL) Rule Construction Translation”

5. Enter a maximum amount for this award in the Award Maximum field.

Note: The award maximum you enter here is the maximum amount for this award and is not linked to the Category Maximum field on the Packaging Category Detail (APCD) form. That amount is the cumulative maximum a student can receive from a combination of awards in that packaging category. “Award Packaging (APAC)” “Packaging Amount Rule (PARL) Rule Construction Translation”.

South Dakota Colleague System Procedures

6. Record any overrides for the equivalent packaging category field in the following APAC fields:

- Gift/Self
- Round Type
- Rounding Units
- CB/Inst Rules
- Freeze Award
- Award Amount Restrictions
- Award Minimum

“Award Packaging (APAC)” “Packaging CB/Inst Rule (PCRL) Rule Construction Translation”

“Packaging Amount Rule (PARL) Rule Construction Translation”.

South Dakota Colleague System Procedures

Entering Data From Completed Automatic Packaging Worksheets

Responsibility:

Timeframe:

Follow the steps in Table 4-13 to enter the data from your completed packaging worksheets into Colleague.

1. Enter your attendance pattern codes and rules on Colleague.

See "Setting Up Attendance Patterns" for details on setting up attendance patterns. "Attendance Pattern Definition (ATPC)" "Attendance Pattern Rule (PATR) Rule Construction Translation"

2. Enter the attendance pattern rule table ID for automatic packaging to use for processing.

If you expect to use the same rule table ID from year to year to assign attendance patterns to students, enter a rule table ID in Attendance Ptrn Rules field on the FA Awarding Parameters (FAAP) form. The rule table ID you enter here applies only to the current FA year.

The forms that use the ID in this field can use it for other FA years, provided you have built the ID for that year using the PATR form.

If you expect to use one set of rules to assign attendance patterns for the current FA year and a different set of rules for other FA years, enter a rule table ID in the Attendance Pattern Rule field on the Packaging Definition (PKDF) form. The PKDF form allows you to enter year-specific rule table IDs. Your entry on the PKDF form serves as an override of the FAAP entry for that year. "Attendance Pattern Rule (PATR) Rule Construction Translation"

3. Enter global packaging restrictions that apply to students with this definition ID.

Use the PKDF form to enter global packaging restrictions. "Packaging Definition (PKDF)"

4. Enter Packaging Definition Rule Table (PDRL) for the year.

5. Enter your packaging groups on Colleague.

Enter PACKAGE.GROUPS at the Validation Code ID LookUp prompt on the Validation Table Maintenance (VAL) form. Create each code you have defined on the "Packaging Group Code Master List" worksheet. "Packaging Group Code Master List"

6. Define in Colleague rules for assigning students to packaging groups.

On the PGRL form, create a rule table ID for the rules table you defined on the Package Group Assignment Rules Worksheet and enter the data from the worksheet. The result of each rule is a value from the PACKAGE.GROUPS validation code table you defined in Step 4. "Packaging Group Rule (PGRL) Rule Construction Translation"

7. Define packaging categories for packaging awards.

For each packaging category you have defined on the "Package Category Detail (APCD)" worksheet, complete the APCD form, entering the data for each category. For those fields that require rule table IDs as entries, detail to the rule form to create the rule table. Enter the data from the appropriate rule table worksheet.

Note: Each packaging award that you define must belong to a packaging category, even if it is the only award in that category.

"Package Category Detail (APCD)"

"Packaging CB/Inst Rule (PCRL) Rule Construction Translation"

"Packaging Eligibility Rule (PERL) Rule Construction Translation"

"Packaging Amount Rule (PARL) Rule Construction Translation"

"Packaging Year in College Rule (PYRL) Rule Construction Translation"

"Packaging Percent Rule (PCTR) Rule Construction Translation"

"Award Packaging (APAC)" worksheet in the following required fields:

South Dakota Colleague System Procedures

- a packaging category for the award
- a priority for the award within the category
- Y or N in the Use AEC Criteria field

9. For each award fund that has exceptions to packaging category rules or data, enter the restrictions that apply to the specific award. For each award fund you have defined on Colleague, use the APAC form to enter rules for any award-level restrictions. For those fields that require rule IDs as entries, detail to the rule form to enter the rule table.

“Award Packaging (APAC)”

“Packaging CB/Inst Rule (PCRL) Rule Construction Translation”

“Packaging Eligibility Rule (PERL) Rule Construction Translation”

“Packaging Amount Rule (PARL) Rule Construction Translation”

“Packaging Year in College Rule (PYRL) Rule Construction Translation”

“Packaging Percent Rule (PCTR) Rule Construction Translation”

South Dakota Colleague System Procedures

Using the APGR Report to Review Packaging Category and Award Setup

Responsibility:

Timeframe:

Complete the steps below to review and revise your setup of automatic packaging categories and automatic packaging awards.

Step 1 - Access the APGR form.

Step 2 - Complete the fields on the APGR form.

Step 3 - Review the report to determine if:

- ①○ you have created a sufficient number of packaging categories
- ①○ Each category is defined correctly
- ①○ You have placed the correct awards in the correct packaging category
- ①○ individual awards are defined correctly

Use your completed worksheets as reference points in this review.

Step 4 - Revise your packaging categories and packaging awards as necessary and run the report again until the results are sufficient for your needs.

South Dakota Colleague System Procedures

Running the PKCR Form in Simulation Mode

Responsibility:

Timeframe:

Follow the steps below to run the PKCR form in simulation mode.

Step 1 - Review “The Student Package Report” 17 to determine which report option best meets your testing needs.

Step 2 - Access the PKCR form.

- The Automatic Packaging (PKCR) form is displayed.

Step 3 - Enter the name of your saved list in the Saved List Name field or enter the names of individual students in the Students window. Ensure that your saved list or entries in the student window provide a crosssection of the packaging groups you plan to award. Also, if you are using the ERV report option, ensure that your saved list contains less than 10 student records to limit the processing time for the report and the amount of output the report generates.

Step 4 - If you require it, limit the PKCR form’s processing to students in a specific packaging group by entering the group code(s) in the Package Group field or to students with specific student attendance patterns by entering the attendance pattern code in the Attendance Pattern field.

Step 5 - Go to the Update Package field and enter **N**.

Step 6 - Enter the appropriate code for the report option you want in the Student Package Report field.

The report options and codes are as follows:

- ①○ Expanded Rule Validation option (ERV) prints the rules and values for each rule for each student.
- ①○ The Validation Report (V) option reports the values returned for each rule for each student, but omits printing the rules themselves.
- ①○ The Student Packaging Report (S) option is available as a quick view of the vital package statistics for each student in the packaging run.

The ERV2 option for the student package report shows the manner in which defaults and rules are evaluated by automatic packaging processing and how they are being applied to each individual student. See “The Student Package Report” for more on the report options.

Step 7 - Choose the manner in which you want the Fund Report sorted for your testing purposes. Keep in mind that funds do not change until the PKCR form actually awards funds to a student. Simulation mode does not change the fund balances.

Step 8 - Enter **Y** in the Additional Selection Criteria field if your testing requires it. When you enter **Y**, the additional selection criteria form is displayed, on which you further narrow your selection.

Step 9 - Finish from the PKCR form.

South Dakota Colleague System Procedures

- The PKCR form produces the Student Package Report at the level of detail you selected and the Fund Report, sorted in the order you specified. This form does not update records when you enter **N** in the Update Package field.

Note: Once you have finished from the PKCR form, it goes through the selection and packaging process and prints out the Student Package Report option that you specify, as well as the Fund Report sorted in the order you specified. Continue to run the report with your test group of students after making modifications to your packaging setup until the group is awarded as you would have manually awarded them. Some trial and error may be necessary.

South Dakota Colleague System Procedures

Creating Aid Packages for Groups of Students

Responsibility:

Timeframe:

Step 1 - Access the Packaging Definition (PKDF) form.

- The PKDF form is displayed, showing the settings from the last time the PKCR form was run.

Step 2 - Make modifications as necessary to the PKDF form for this packaging run or create a new Packaging Definition (PKDF). The changes that you make apply to the next and any subsequent packaging runs, until the PKDF form settings are further modified.

Step 3 - Finish from the PKDF form.

- The menu prompt from which you accessed the PKDF form is displayed.

Step 4 - Access the Automatic Packaging (PKCR) form.

- The PKCR form is displayed.

Step 5 - Enter the academic year for which you want to package student aid. You can enter only those years for which your system administrator has created file suites. If the academic year you require is not listed, call your system administrator.

Step 6 - Enter the name of a saved list of student records in the Saved List Name field or enter individual student IDs in the Students field.

You have the option to further limit this initial selection of student records using any or all of the following options:

- Ⓐ Limit the selection to specific packaging groups by entering the codes you want the selection limited to in the Package Groups field.
- Ⓐ Limit the selection to specific attendance patterns by entering the attendance pattern code in the Attendance Patterns field.
- Ⓐ Limit the selection by using additional selection criteria by entering **Y** in the Additional Selection Criteria field. When you enter **Y** in this field, the Additional Selection Criteria form is displayed, on which you can enter criteria that further limit the additional selection.

Step 7 - If you want to limit processing to automatic packaging of specific award funds, enter the award codes in the Awards field. If you leave the awards field blank, the packager selects every possible packaging award (packaging awards are defined as those awards that belong to a specific packaging category).

Step 8 - Move your cursor to the Update Package field.

- Enter **N** if you want the PKCR form to run in simulation mode.
- Enter **Y** if you want the PKCR form to create actual aid packages for each of the students in the final selection.

You may feel more comfortable running the PKCR form in simulation mode at least once and reviewing the Student Package Report before you run the form in update mode.

Step 9 - Enter the appropriate code for the report option you want in the Student Package Report field.

South Dakota Colleague System Procedures

The report options and codes are as follows:

- ①○ Expanded Rule Validation option (ERV) prints the rules and values for each rule for each student.
- ①○ The Validation Report (V) option reports the values returned for each rule for each student, but omits printing the rules themselves.
- ①○ The Student Packaging Report (S) option is available as a quick view of the vital package statistics for each student in the packaging run.

The ERV1 option for the student package report shows the manner in which defaults and rules are evaluated by automatic packaging processing and how they are being applied to each individual student. See “The Student Package Report” for more on the report options.

Step 10 - Choose the manner in which you want the Fund Report sorted. Keep in mind that funds do not change until the PKCR form actually awards funds to a student. Simulation mode does not change the fund balances.

Step 11 - Enter **Y** in the Additional Selection Criteria field if you want to limit the initial selection. When you enter **Y**, the additional selection criteria form is displayed, on which you further narrow your selection.

Step 12 - Finish from the PKCR form.

- The PKCR form produces the Student Package Report at the level of detail you selected and the Fund Report, sorted in the order you specified. If you entered **Y** in the Update Package field, this form creates aid packages for those students in the final selection.

South Dakota Colleague System Procedures

Packaging an Individual Student

Responsibility:

Timeframe:

Follow the steps below to create an aid package for an individual student.

Step 1 - Access the Student Packaging Definition (SPCK) form for the academic year and student you need. When you first access this form, the packaging rules defined on the Packaging Definition (PKDF) form are displayed in the center column.

Step 2 - Enter in the Desirability field a code defined by your institution to indicate recruiting interest in this student.

Step 3 - Detail on the Evaluate field to have Colleague evaluate this student against the rules defined on the PKDF form. The results of the rule evaluation are displayed in the right-hand column of the form.

Step 4 - To override a rule-based value from PKDF with a value specific to this student, move your cursor to the appropriate field and enter the data for this student.

- To create an aid package for this student based on the overrides you have entered here, detail on the Calc Package field. The Student Packaging (SPKI) form is displayed and the student's aid package is calculated, based on the overrides for this student that you entered on the SPCK form.
- To reject the aid package calculated by the SPKI form, cancel from the SPKI form. The aid package is not saved and the student's records are not updated. You are returned to the SPCK form where you can further modify student overrides until you get the aid package you want for this student.
- To accept the aid package calculated by the SPKI form, finish or update from the SPKI form. The aid package is created and the student's records are updated. You are returned to the SPCK form.

South Dakota Colleague System Procedures

Completely Repackaging a Student or Group of Students

The following procedure applies to repackaging both students whose aid packages were created by the PKCR form, by the SPKI form or manually using the Award Detail Entry (AIDE) form.

Step 1 - Access the PKDF form for the academic year for which you want to create the aid package.

- The PKDF form for that year is displayed.

Step 2 - Enter **Y** in the Recalculate Attendance Patterns field.

Step 3 - Leave blank the Include Previous Term Awards with the Following Statuses field.

Step 4 - Leave blank the Freeze Previous Term Awards with the Following Statuses field.

Step 5 - Finish from the PKDF form.

- Your changes are saved and are accessed by the PKDF form for the next packaging run.

Step 6 - Access the PKCR form for the year for which you want to create aid packages. The PKCR form is displayed.

Step 7 - Complete the remaining fields on the PKCR form (entering a saved list of students or individual student IDs, choosing to run the form in simulation mode or update mode, choosing the appropriate reports). See “Running the Automatic Packaging (PKCR) Form In Simulation Mode” for more information on running the form in simulation mode and “Understanding Reporting Options” for more information on the available reports.

Step 8 - Finish from the PKCR form.

- The students you select are reevaluated for each packaging award as if they had not been previously packaged. Non-packaging awards are left untouched on the student’s record.

South Dakota Colleague System Procedures

Entering a New Award

Responsibility:

Timeframe:

Follow the steps below to manually enter a new award for a student.

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

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.

Step 4 - Scroll through any existing awards in the Award group until you reach a blank line.

Step 5 - On a blank line in the Award group, enter an award code or use Award LookUp to find the code you want.

Step 6 - Enter an amount for the award.

ALERT! Be sure to review any existing awards, along with the header information about the student's cost of attendance (COA), estimated family contribution (EFC), unmet cost, unmet need, and Pell amounts, before you make any entries. See "Understanding the Information Header" for details about information header fields.

Colleague checks the student's eligibility for the award you enter if the FA Awarding Parameters (FAAP) form has the Check Elig on New Award field set to "Yes." If Check Elig is set to "Yes.", and the student is not eligible for the award, the Award Eligibility Status (AECF) form is displayed, on which you can indicate that you want to ignore the conditions and enter the award. See "Overriding Award Eligibility" for a procedure for overriding global and award criteria for a given student for a given award period. If Check Elig is set to "No," eligibility criteria are not checked until the award funds are transmitted, at which time you will receive warning messages about the student's eligibility.

Step 7 - Enter a valid action code.

Step 8 - Enter the date this award was assigned to this student in the Date field.

Step 9 - If you are entering a federal work study award and the Maintain CWS Earnings field on the FA Awarding Parameters (FAAP) form is set to "Yes," enter the work study amount in the CWS Earn field. If you are not entering a federal work study award, continue with the next step.

Note: A default action code, specified for this award on the Award Definition (AWD) form, is displayed. You can modify the action code on this form. The action displayed indicates the global action for this award, for all award periods. You have the option to change the action codes for specific award periods for this award in the Awd Per field. If different actions are indicated for this award for different award periods, an asterisk (*) is displayed here. Award actions are defined on the Award Action Definition (ACT) form.

Note: The date that is defaulted into this field is the date the award is assigned to the student. You can change the date appearing in this field. If your institution has set the Annual Action Date Dflt field on the FA Awarding Parameters (FAAP) form to "Yes," you can also leave this field blank, and Colleague will automatically update it when changes are made to this award.

South Dakota Colleague System Procedures

Note: The amount of the award transmitted to the student's accounts receivable record is displayed in the A/R-Cred field.

Step 10 - Complete one of the following:

- ①○ If you want to enter additional new awards for this student, repeat steps Step 4 through Step 9.
- ①○ If you want to adjust award distribution amounts for this award, continue with “Procedure for Adjusting Award Distributions”.
- ①○ If you want to modify information for an existing award for this student, continue with “Procedure for Modifying an Existing Award”.
- ①○ If you have completed your work for this student on this form, save your changes.

South Dakota Colleague System Procedures

Modifying an Existing Award

Responsibility:

Timeframe:

Follow the steps below to modify an existing award for a student.

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

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.

Step 4 - The cursor moves to the first line of the Award group.

Step 5 - Enter in the Awd group (in the middle of the form) the award code that you want to modify or use Award LookUp to find the code you want.

Step 6 - Make any changes to the annual summary information in the Award group.

Step 7 - Make changes to the award-period level information for the award in the Awd Per group.

ALERT! Be sure to review the existing awards, along with the header information about the student's cost of attendance (COA), estimated family contribution (EFC), unmet cost, unmet need, and Pell amounts, before you make any entries. See "Understanding the Information Header" for details about information header fields.

Note: The award code and the original amount of the award are displayed in the Awd group. In the Award group above, the award code that you entered is highlighted in the list of the student's awards so that you can modify annual summary information about the award. In the Awd Per field below, you can modify award period level information for the award.

Note: See field help for information about entries in specific fields in the Award group.

Note: See field help for information about entries in specific fields in the Awd Per group.

Step 8 - Complete one of the following:

- If you want to modify additional awards, repeat Step 5 through Step 8.
- If you want to enter a new award for this student, continue with "Procedure for Entering a New Award".
- If you want to adjust award distribution amounts for this award, continue with "Procedure for Adjusting Award Distributions".
- If you have completed your work for this student on this form, save your changes.

South Dakota Colleague System Procedures

Adjusting Award Distributions

Responsibility:

Timeframe:

Follow the steps below to adjust the manner in which a specific award is distributed across the award periods in the student's attendance pattern.

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

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.

Step 4 - Scroll through the awards in the Award group until you reach the award you want, or enter the award code in the Awd field.

Step 5 - Scroll through the list of award periods to the award period you want to change.

Note: You can adjust award distributions in one of the following ways:

- To change the manner in which all the student's awards are distributed, adjust the student's attendance pattern (see "Adjusting Student Attendance Patterns" 1).
- To adjust the award distribution for a single award, follow the steps below.

ALERT! Be sure to review any existing awards, along with the header information about the student's cost of attendance (COA), estimated family contribution (EFC), unmet cost, unmet need, and Pell amounts, before you make any entries. See "Understanding the Information Header" for details about information header fields.

Step 6 - Delete the current entry and enter the new amount for this award period. Your change is immediately reflected in the total amount for the award in the Award group in the upper half of the form.

Step 7 - Repeat Step 6 to make adjustments to any other award period distribution amounts.

Step 8 - Save your work on this form.

Note: In addition to changing the distribution amount, you have the option to change the award action code, the action date, or the FA credits on the student's attendance pattern for this award period.

South Dakota Colleague System Procedures

Reassigning the Student's Attendance Pattern

Responsibility:

Timeframe:

Follow the steps below to re-evaluate the rules specified on the Attendance Pattern Rule Table (PATR) form to assign an attendance pattern code specified on the Attendance Pattern Definition (ATPC) form.

Step 1 - Access the Student Attendance Pattern (SATP) form.

Step 2 - In the prompt, enter an academic year or select the displayed year.

Step 3 - In the prompt, enter a student ID or use LookUp to find the student record you want.

ALERT! Any changes you make to the student attendance pattern apply to future awards only unless you detail on the Resplit Awards field to redistribute existing awards based on your changes.

Step 4 - Detail on the Calc Attendance Pattern field to reassign the student's attendance pattern.

Step 5 - If you want to further customize the current attendance pattern by modifying information for specific award periods, continue with "Procedure for Changing Award Period Information". If you do not want to further customize the attendance pattern, continue with Step 6.

Step 6 - If you want to redistribute awarded funds based on the current attendance pattern, detail on the Resplit Awards field. If you do not want to redistribute awarded funds, save your work on this form.

Technical Tip: Colleague uses rules specified on the Attendance Pattern Rule Table (PATR) form to assign an attendance pattern code from the Attendance Pattern Definition (ATPC) form to the student. Colleague displays the assigned code in the Attendance Pattern Code field and rebuilds the student attendance pattern, meshing any existing award periods with the award periods on the attendance pattern code.

Note: If you choose not to redistribute awarded funds, your changes to the student attendance pattern apply only to future awards. Current awards are unaffected.

South Dakota Colleague System Procedures

Overriding the Assigned Attendance Pattern

Responsibility:

Timeframe:

Follow the steps below to override the attendance pattern code assigned to the student by the rules defined on the Attendance Pattern Rule Table (PATR) form.

Step 1 - Access the Student Attendance Pattern (SATP) form.

Step 2 - In the prompt, enter an academic year or select the displayed year.

Step 3 - In the prompt, enter a student ID or use LookUp to find the student record you want.

Step 4 - Change the code in the Attendance Pattern Code field.

- a. Delete the existing code.
- b. Enter a new code.

Step 5 - Detail on the Rebuild Attendance Pattern field.

- Colleague compares the current student attendance pattern for this student with the information associated with the attendance pattern code entered on the Attendance Pattern Code field and meshes any existing awarded terms with the terms on the attendance pattern code.

ALERT! Any changes to the student attendance pattern apply to future awards only unless you detail on the Resplit Awards field to redistribute existing awards based on your changes.

Note: Remember that Pell and loan recipients must be assigned attendance patterns that are tied to disbursement codes which are created on the Award Disb Code Maintenance (ADCM) form.

Technical Tip: If all the award amounts for an award period are zero and the new attendance pattern does not contain that award period, the award period is removed from the student attendance pattern and the award period awards record is deleted.

Once the student attendance pattern is rebuilt using the data from the attendance pattern you specified in the Attendance Pattern Code field, you can customize the award period information to reflect the student's pattern of attendance.

Step 6 - If you want to redistribute awarded funds based on the current attendance pattern, detail on the Resplit Awards field. For more information on redistributing awarded funds, see "Procedure for Redistributing Student Awards". If you do not want to redistribute awarded funds, continue with Step 7.

Step 7 - If you want to further customize the current attendance pattern by modifying information for specific award periods, continue with "Procedure for Changing Award Period Information". If you do not want to further customize the attendance pattern, save your work on the SATP form.

South Dakota Colleague System Procedures

Redistributing Student Awards

Responsibility:

Timeframe:

Follow the steps below to redistribute the student's awards based on your most recent changes to the student's attendance pattern.

Step 1 - Access the Student Attendance Pattern (SATP) form.

Step 2 - In the prompt, enter an academic year or select the displayed year.

Step 3 - In the prompt, enter a student ID or use LookUp to find the student record you want.

Step 4 - Detail on the Resplit Awards field.

Step 5 - Save your changes on this form.

ALERT! When you change an attendance pattern on the SATP form, your changes apply only to future awards unless you follow the steps below to redistribute already awarded funds based on your changes.

Note: When you detail on this field, Colleague uses the information in the current student attendance pattern to resplit existing awards. Colleague does not distribute aid to those award periods that are specified by the attendance pattern as frozen or for which the distribution weight is zero.

Technical Tip: Be aware that when an award period is frozen or if the distribution weight for that award period is zero, Colleague scales the remaining weights. Colleague scales the actual weights based on the weights of the award periods that are actually available for awarding. If, for example, you have four award periods with weights of 25, 25, 25, 25; and one of the award periods is frozen (or for some other reason is not to be awarded), the total is divided equally among the remaining unfrozen award periods. That is, the award is divided three ways.

South Dakota Colleague System Procedures

Overriding the Student's Current Location

Responsibility:

Timeframe:

Follow the steps below to override the student's current location.

Step 1 - Access the Student Attendance Pattern (SATP) form.

Step 2 - In the prompt, enter an academic year or select the displayed year.

Step 3 - In the prompt, enter a student ID or use LookUp to find the student record you want.

Step 4 - If you want Colleague to re-evaluate the rules to assign a location to this student, detail on the Current Location field. If you do not want Colleague to re-evaluate the rules to assign a location to this student, continue with Step 5.

ALERT! Once the student has been awarded, you can change the student's location only from this field and not from the Financial Aid Application (FAPP) form.

Technical Tip: Colleague redisplay the student's location based on the student's current information. Colleague displays a warning when the student has an award fund that does not have a budget for the office associated with the new location and when the student has funds with action statuses that have been entered in the Location Warning Action Statuses field on the FA Awarding Parameters (FAAP) form. You have the option to change the location for each award at the award period level. Colleague warns you in this case, as well.

Step 5 - If you want to override the location displayed in the Current Location field, enter another location code or use LookUp to find the code you need. If you do not want to override the location displayed in the Current Location field, continue with Step 6.

Step 6 - Save your work on this form.

South Dakota Colleague System Procedures

Changing Award Period Information

Responsibility:

Timeframe:

Step 1 - Access the Student Attendance Pattern (SATP) form.

Step 2 - In the prompt, enter an academic year or select the displayed year.

Step 3 - In the prompt, enter a student ID or use LookUp to find the student record you want.

Step 4 - Go to the line for the appropriate award period in the Award Period group. To change specific information for an award period. For complete instructions on changing award period information, follow the steps below in order.

Step 5 - If you want to delete an award period from this student's attendance pattern, use the Delete function to delete the line.

- Delete an award period
- Prevent any additional aid from being awarded (freeze the award period)
- Override the location for an award period
- Override FA Credits, FA Enrollment, FA Residency, and FA Housing
- Prevent any aid from being distributed to an award period
- Adjust an award distribution weight for an award period
- Override the length of the award period
- Designate an award period as a Pell payment period

If you do not want to delete an award period, continue with the next step.

Step 6 - If you want to freeze an award period (prevent any additional aid from being awarded to the award period), enter **Y** in the Frz field (between the Start/End Date and FA/Reg Loc column). If you do not want to freeze an award period, continue with the next step. Your entry of **Y** in the Frz column prevents any additional aid from being awarded to the student for this frozen award period.

Step 7 - If you want to override the location for this award period, enter the location in the FA Loc field. If you do not want to override the location for this award period, continue with the next step.

Note: You can delete only those award periods for which no awards exist. You can delete a student's existing awards using the Award Detail Entry (AIDE) form. You have the option to change the distribution weight to zero for an award period by entering 0 in the Weight field. This option preserves the award period on the student's attendance pattern, but prevents any aid from being awarded.

Note: Be aware that when an award period is frozen, Colleague scales the remaining weights. Colleague scales the actual weights based on the weights of the award periods that are actually available for awarding.

Technical Tip: If, for example, you have four award periods with weights of 25, 25, 25, 25; and one of the award periods is frozen (or for some other reason is not to be awarded), the total is divided equally among the remaining three unfrozen award periods.

South Dakota Colleague System Procedures

Note: The Reg location code for the student for the award period is displayed below in the Reg Loc field.

Technical Tip: Colleague displays a warning when the student has an award fund that does not have a budget for the office associated with the new location and when the student has funds with action statuses that have been entered in the Location Warning Action Statuses field on the FA Awarding Parameters (FAAP) form.

Step 8 - Enter an override for this student for this award period in one of the following fields:

- Override credit hours in the FA Cred field
- Override full/part time status in the FA Enroll field
- Override residency status in the FA Res field
- Override housing status in the FA Hsg field

Step 9 - If you want to prevent any aid from being distributed to an award period, in the Weight field, change the weight to zero for the award period. If you do not want to prevent any aid from being distributed to an award period, continue with the next step.

Step 10 - If you want to adjust an award distribution weight for an award period, enter the new distribution weight in the Weight field. If you do not want to adjust an award distribution weight, continue with the next step.

Note: The values in these fields are defaulted from the current attendance pattern. The values you enter here can also be changed from the Award Detail Entry (AIDE) form.

Note: Your change applies to future awards only. To redistribute already awarded funds based on your changes, detail on the Resplit awards field. For more information on redistributing aid, see "Procedure for Redistributing Student Awards".

Note: Be aware that when you change a distribution weight to zero, Colleague scales the remaining weights. Colleague scales the actual weights based on the weights of the award periods that are actually available for awarding.

Technical Tip: If, for example, you have four award periods with weights of 25, 25, 25, 25; and you change the distribution weight to zero for one of the award periods, the total is divided equally among the three remaining unfrozen award periods.

Note: Your change applies to future awards only. To redistribute already awarded funds based on your changes, detail on the Resplit awards field. For more information on redistributing aid, see "Procedure for Redistributing Student Awards".

Step 11 - If you want to override the length of this award period, enter the new award period length in weeks in the Length field. If you do not want to override the length of this award period, continue with the next step.

Step 12 - If you want to designate this award period as a Pell payment period, enter Y in the Pell Pmt field. If you do not want to designate this award period as a Pell Payment period, continue with the next step.

Step 13 - Save your work on this form.

South Dakota Colleague System Procedures

Note: The length of your institution's award periods should be weeks, unless you are using a custom split subroutine on the Award Definition (AWD) form. The length you enter here is used by the Pell subroutine (S.FA.PKG.AMT.PELL) that is delivered for use with automatic packaging.

Technical Tip: The Pell payment designation is used for packaging Pell awards and for award period distribution of Pell annual awards. This field must contain a "Y" for a Pell award to be split to this award period. (When you enter the Pell packaging amount subroutine, S.FA.SPLIT.AMT.PELL, in the Split Subroutine field on the Award Definition [AWD] form for a Pell award, the subroutine looks for a Pell payment designation to distribute aid to the award period.)

South Dakota Colleague System Procedures

Overriding Eligibility Criteria

Responsibility:

Timeframe:

Follow the steps below to override an award's eligibility criteria for a specific student and specific award period.

Step 1 - Access the Student Eligibility Criteria (SEC) form.

Step 2 - The Student Eligibility Criteria (SEC) form is displayed with the cursor at the Academic Year LookUp prompt.

Step 3 - Enter an academic year or select the displayed year.

Step 4 - Enter a student ID or use LookUp to find the student record you want.

Step 5 - Enter an award ID or use LookUp to find the award that you want.

Step 6 - Enter an Award Period ID or use LookUp to find the award period that you want.

Note: When you make changes to a student's eligibility, *****Override***** is displayed in the SEC form header.

Note: You can quickly and easily remove the eligibility overrides you create in this procedure by entering **N** in the Over[ride] E[ligibility] field on the Detail Award View (DAV) form. The default eligibility criteria specified on the Award Eligibility Criteria (AEC) form are restored.

Note: Enter **. . .** at the LookUp prompt to view a resolution list of all the student's awards for the year. You can select the award you need from the list.

Note: Enter **. . .** at the LookUp prompt to view a resolution list of all the student's award periods from the student's attendance pattern. You can select the award period you need from the list.

Step 7 - If you want to change the relationship among the eligibility criteria that are specified:

a. Enter **A[nd]** if you want a result of "true" only if all the criteria are true.

b. Enter **O[r]** if you want a result of "true" if any of the criteria are true.

If you do not want to change the relationship among the eligibility criteria, continue with the next step.

Step 8 - If you want to override an eligibility criteria rule, delete the rule table ID from the Rules field or detail to the Rules Definition (RLDE) form to modify a rule for a student. If you do not want to override an eligibility criteria rule, continue with Step 9.

Step 9 - If you want to apply global eligibility criteria for this award for this award period, enter **Y**. If you do not want to apply global eligibility criteria for this award for this award period, enter **N**. The value in this field is defaulted from the Apply Global Criteria field on the Award Eligibility Criteria (AEC) form. Global Eligibility Criteria are specified on the Global Award Eligibility Criteria (GEC) form.

Step 10 - If you want to override for this student the use of an award eligibility subroutine entered on the AEC form, use the delete function to remove the name of the subroutine from the

South Dakota Colleague System Procedures

Eligibility Subroutine field. If you do not want to override the subroutine or if no subroutine is used, continue with the next step.

Step 11 - Save your work on this form.

Note: When the Apply Global Criteria field is set to γ , a student must meet the global criteria before Colleague checks the award-specific criteria. The student must meet both the global and the award-specific eligibility criteria before the award is transmitted.

South Dakota Colleague System Procedures

Restoring Default Eligibility Criteria

Responsibility:

Timeframe:

Step 1 - Access the Detail Award View (DAV) form.

- The Detail Award View (DAV) form is displayed with the cursor at the Academic Year LookUp prompt.

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

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

Step 4 - Enter an award ID or use LookUp to find the award that you want.

Step 5 - In the Award Period Information group, go to the award period for which you want to restore the default eligibility.

Step 6 - Enter **N** in the Over[ride] E[ligibility] field.

Step 7 - Save your work on this form.

Note: In your day-to-day work, you may find it more convenient to use the DAV form as a detail form from the Award group on the Award Detail Entry (AIDE) form.

Note: Enter . . . at the LookUp prompt to view a resolution list of all the student's awards for the year. You can select the award you need from the list.

Note: If the Student Eligibility Criteria (SEC) form was used to modify the eligibility criteria for this award for this award period, **X** is displayed in this field. When you enter **N**, the student-specific criteria you entered for this award and award period are removed from the SEC form. The default eligibility criteria are restored.

South Dakota Colleague System Procedures

Overriding Transmittal Limitations

Responsibility:

Timeframe:

Step 1 - Access the Student AR Xmit Limitations (SAXL) form.

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

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

Step 4 - Enter an award ID or use LookUp to find the award that you want.

Step 5 - Enter an Award Period ID or use LookUp to find the award period that you want.

Step 6 - If the award you selected is a Destination 7 award, continue with Step 7. If you have selected a Destination 1 or 6 award, continue with Step 15.

Step 7 - If you want to override a charge eligibility rule, delete the existing rule, create a new rule, or detail to the Rules Definition (RLDE) form to modify, for this student, the default rule, enter the rule or use Lookup. If you do not want to override a charge eligibility rule, continue with the next step. Charge eligibility rules are the first level of limitation you can define for transmittal of this award to this student. Each charge must pass all the charge eligibility rules you define for this student to be transmitted to AR. All rules are evaluated, and all must be true in order for a charge to be covered.

Note: When you make changes to a student's transmittal limitations, *****Override***** is displayed in the SAXL form header.

Note: You can quickly and easily remove the transmittal limitation overrides you create in this procedure by entering **N** in the Over[ride] T[ransmittal] field on the Detail Award View (DAV) form. The default transmittal limitations specified on the AR Xmit Limitations (AAXL) form are restored.

Step 8 - If you do not want to override an amount limit rule, continue with Step 9. If you want to override an amount limit rule:

a. Delete the existing rule, create a new rule, or detail to the Rules Definition (RLDE) form to modify, for this student, the default rule.

b. Enter the percent of the charge to be covered by the award. For example, if an award will pay 100 percent of all charges associated with courses in the student's major, you would:

1. Define a rule that determines whether a course section is in the student's major and enter the rule ID in this field.
2. Associate that rule with a percent of charge value of "100" by entering **100** in the Pct of Charge field in this group. If the same award will also cover 50 percent of all other charges, you would:
3. Define a rule that determines whether a course section is not in the student's major and enter that rule in this field
4. Associate that rule with a percentage of charge value of "50" by entering **50** in the Pct of Charge field in this group

Amount limit rules are the second restrictions level you can define for transmittal of this award to this student. Any charge that passes the eligibility rules defined for this award and this student (in

South Dakota Colleague System Procedures

the Eligibility Rule field) is evaluated against the amount limit rules you define here. Each charge must pass one of the amount limit rules for Colleague to consider it covered.

Step 9 - If you want to remove an AR Category limitation, use the delete function to remove the AR code from the AR Category field. Continue with Step 12. If you want to add an AR Category limitation, continue with Step 10. If you want to modify the percentages for an existing AR category limitation, continue with Step 11. If you do not want to modify default AR Category limitations, continue with Step 12.

Note: Even when a charge passes an amount limit rule, it may be further reduced by either an AR category restriction or an AR code restriction.

Step 10 - In the AR Category field, enter an AR category code. If you don't know the code, use LookUp to find the record you need. AR categories are the third limitation level you can define for transmittal of this award to this student. Any charge that passes the first two limitations (eligibility rules and amount limit rules) is evaluated against the list of AR categories you enter here. Each charge must match one of the AR categories listed to be considered covered. If Colleague finds a match between the AR category of the charge and one of the AR categories listed here, the following actions are taken:

- ①○ The charge is reduced by the associated percent of charge up to the maximum set by either the percent limit or the amount limit.
- ①○ The charge is evaluated against any AR code restrictions defined for this award.

If you have defined a list of AR categories in this field, but a particular charge is not associated with an AR category (if the AR code does not have an AR category), then the charge does not pass this level of the transmittal evaluation.

If you have not defined AR category limitations, then each charge “passes” this level of the transmittal limitation and is evaluated against any AR code restrictions you define in the AR Code field.

Step 11 - For each AR category you enter, complete the following:

- a.** In the Pct of Charge field, enter the percentage of charges in this category you want to be covered by this award. For example, if an award will pay all the charges associated with this category, enter **100**. The default for this field is 100 percent.
- b.** To limit the amount covered as a percent of the total award, in the Pct Limit field, enter the maximum percentage of the specified award's total award amount that can be used to cover charges for this student in this AR category.
- c.** To limit the amount covered by a maximum dollar amount, in the Amt Limit field, enter the maximum dollar amount of the total award amount that can be used to cover charges for this student in this AR category. For each AR category listed in the AR Category field, you can enter either a percent limit (in the Pct Limit) or an amount limit (in the Amt Limit field) to define this award's maximum transmittals for the selected student. If you enter both a percent limit and an amount limit, Colleague uses the lesser of the two amounts as the covered amount for a given charge. If both the Pct Limit and the corresponding Amt Limit field are left blank, any charge belonging to this AR category is covered at the percentage stipulated in the Pct of Charge field, unless restricted by eligibility rules, amount limit rules, or AR codes.

Step 12 - If you want to remove an AR Code limitation, use the delete function to remove the AR code from the AR Code field. Continue with Step 15. If you do not want to modify default

South Dakota Colleague System Procedures

AR Code limitations, continue with Step 15. If you want to add an AR Code limitation, continue with Step 13. If you want to modify the percentages for an existing AR Code, continue with Step 14.

Step 13 - In the AR Code field, enter the ID of one or more AR codes. If you don't know the code, use LookUp to find the record you need. An AR code describes how Colleague distributes revenue associated with charges and credits to an accounts receivable account.

Note: Enter `;D ...xxxx...`, where `xxxx` represents a word from the code description to see all AR codes with a specific word in the description. For example, enter `;D ...fees...` to see a list of all AR codes with the word "fees" in their description. When you use this option be aware that the LookUp processor is case sensitive and you will get different results from entering `;D ...FEES...` and `;D ...fees...`.

AR codes are the final limitation level you can define for transmittal of this award to this student for this award period. Any charge that passes eligibility rules, amount limit rules, and AR category restrictions, is evaluated against the list of AR codes you enter here. Each charge must match one of the AR codes listed to be considered covered.

Step 14 - For each AR code you enter, complete the following:

- a.** In the Pct of Charge field, enter the percentage of charges for this code that you want to be covered by this award. For example if an award will pay all the charges associated with this category, enter **100**. The default for this field is 100 percent.
- b.** To limit the amount covered as a percent of the total award, in the Pct Limit field, enter the maximum percentage of the specified award's total award amount that can be used to cover charges for this student in this AR code.
- c.** To limit the amount covered by a maximum dollar amount, in the Amt Limit field, enter the maximum dollar amount of the total award amount that can be used to cover charges for this student in this AR code. For each AR code listed in the AR Code field, you can enter either a percent limit (in the Pct Limit field) or an amount limit (in the Amt Limit field) to define this award's maximum transmittals for the selected student. If you enter both a percent limit and an amount limit, Colleague uses the lesser of the two amounts as the covered amount for a given charge. If both the Pct Limit and the corresponding Amt Limit field are left blank, any charge belonging to this AR code is covered at the percentage stipulated in the Pct of Charge field, unless restricted by eligibility rules, amount limit rules, or AR categories.

Technical Tip: If Colleague finds a match between the AR code of the charge and one of the AR codes listed here, the charge is reduced by the associated percent of charge up to the maximum set by either the percent limit or the amount limit. If you have defined a list of AR codes in this field, but a particular charge is not associated with an AR category (if the AR code does not have an AR category), then the charge does not pass this level of the transmittal evaluation. If you have not defined AR code limitations, then each charge "passes" this level of the transmittal limitation.

Step 15 - If you want to override for this student the use of an existing transmittal subroutine or delete an existing transmittal subroutine, use the delete function to delete the subroutine name in this field. If you want to use a custom subroutine to limit transmittals, enter the name of the subroutine in this field. See field help for a list of arguments for the subroutine.

Step 16 - Save your work on this form.

South Dakota Colleague System Procedures

Note: Your only option for limiting the transmittal of Destination 1 and 6 awards is to enter a custom subroutine in this field. You can also use this field to enter a custom subroutine to limit the transmittal of Destination 7 awards.

South Dakota Colleague System Procedures

Restoring Default Transmittal Limitations

Responsibility:

Timeframe:

Step 1 - Access the Detail Award View (DAV) form.

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

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

Step 4 - Enter an award ID or use LookUp to find the award that you want.

Step 5 - In the Award Period Information group, go to the award period for which you want to restore the default transmittal limitations.

Step 6 - Enter **N** in the Over[ride] T[ransmittal] field.

Step 7 - Save your work on this form.

Note: If the Student AR Xmit Limitations (SAXL) form was used to modify the transmittal limitations for this award for this award period, **X** is displayed in this field. When you enter **N**, the student-specific criteria you entered for this award and award period are removed from the SAXL form. The default transmittal limitations are restored.

South Dakota Colleague System Procedures

Awarding Aid to Groups of Students

Responsibility:

Timeframe:

Step 1 - Access the Batch Awarding (BAWD) form.

Step 2 - Enter the Academic Year, or select the year that is displayed.

Step 3 - In the Award field, enter the Award you want to add or modify, or use LookUp to find the award you need.

Step 4 - At the Award Period LookUp prompt, enter an award period or use LookUp to find the award period you need.

Step 5 - In the Modify Annual/Awd Per field, indicate the award type you want to award or modify.

a. Enter **A** to award or modify annual awards.

b. Enter **P** to award or modify award-period level awards.

The Award Amount, Dollar Increment, and Pct Incrmnt fields look to this field to indicate whether to process annual or award period amounts.

Step 6 - In the New Action Status field, enter the Action Status you want applied to this award. Action status codes, also called award action codes, are defined by your institution on the Award Actions Definition (ACT) form. After the award action status is applied, you can change an individual student's award action status using either the Award Detail Entry (AIDE) form or the Award Period View (AWPV) form.

Step 7 - If you want to add an award to a student's record, continue with Step 8. If you want to modify an existing award, choose from one of the following

a. To enter a dollar increment for the award, continue with Step 10.

b. To enter a percentage by which the award is to be increased, continue with Step 8.

Step 8 - In the Create New Awards field

a. Enter **Y** if you are adding a new award for a student. Continue with Step 9

b. Enter **N** if you are modifying an existing award.

To increment the dollar amount of the award, continue with Step 10. To enter a percentage by which to increase the award, continue with Step 11.

Step 9 - In the Award Amount field, enter the amount for this award and continue with Step 13. If you enter a dollar amount in this field, you cannot enter anything in either the Dollar Increment field or the Pct Incrmnt/Round field.

Step 10 - In the Dollar Increment field, enter the amount by which you want this award adjusted. You can enter a positive amount to increase the award or a negative (-) amount to decrease the award.

Note: The amount you enter here should correspond to your entry in the Modify Type field. If you entered **A** (for Annual), enter the individual award amount for the entire year. If you entered **P** (for Award Period) in the Modify Type field, enter the individual award amount for the award period only.

South Dakota Colleague System Procedures

Note: The amount you enter here should correspond to your entry in the Modify Type field. If you entered **A** (for Annual), enter the individual award amount for the entire year. If you entered **P** (for Award Period) in the Modify Type field, enter the amount for the award period only. If you enter a dollar increment in this field, you cannot enter anything in either the Dollar Amount field or the Pct Incrmt/Round field.

Step 11 - Enter a percentage by which any selected student's award amount should be increased or decreased.

Step 12 - If you want to create a FIN.AID record for those students who do not already have a record, enter Y in the Create FIN.AID Recs field; otherwise, enter N. If you enter Y in the Create FIN.AID Recs field, you are required to enter a saved list in the Saved List Name field. FIN.AID records can be created only for 2002 and after.

Step 13 - If you want to enter a saved list of student IDs from the FIN.AID file, continue with Step 14. If you want to enter individual student IDs for processing, continue with Step 15. If you want to use Additional Selection Criteria to narrow the selection from your entire database, continue with Step 16

The amount you enter here should correspond to your entry in the Modify Type field. If you entered **A** (for Annual), enter the adjustment percentage for the entire year. If you entered **P** (for Award Period) in the Modify Type field, enter the adjustment percentage for the award period only.

You can enter either a positive percentage (to increase the award) or a negative percentage (to decrease the award). If you enter a percentage increment amount in this field, you cannot enter anything in either the Award Amount field or the Dollar Increment field.

ALERT! You must specify a saved list, individual student IDs, or additional selection criteria for selecting students. If you don't specify a group of students, the BAWD form processes all students in your database.

Step 14 - Enter a saved list of student IDs to award.

- You can use a saved list of IDs that exist in the FIN.AID file to select students for the BAWD form, or you can use a saved list as the basis for selecting the students and then narrow the selection using additional selection criteria.
- If you enter a saved list name, Colleague selects all students in that saved list and, if you do not choose any other selection criteria, awards aid to those students.
- If you enter a saved list name and you use additional selection criteria to select students, Colleague processes all students in the saved list who also meet the other selection criteria you choose.
- The saved list must contain a list of IDs that exist in the FIN.AID file.

Step 15 - Enter the IDs of students to award or use LookUp to find the student records you want. Any selection criteria you specify using the Additional Selection Criteria form (displayed when you enter **Y** in the Additional Selection Criteria field) further restricts your selection from the individual IDs you enter here or from a saved list you enter in the Saved List Name field.

Step 16 - Enter **Y** in the Additional Selection Criteria field to further narrow your selection.

South Dakota Colleague System Procedures

When you enter **Y**, the Additional Selection Criteria form is displayed. Because the BAWD form does not check the award's eligibility criteria set up on the Award Eligibility Criteria (AEC) form, be sure to enter on the Additional Selection Criteria form any eligibility criteria for this award specified on the AEC form. Because the criteria you enter on the Additional Selection Criteria form are the same as the award's eligibility criteria, you can ensure that the BAWD form awards only eligible students.

Note: Since the FIN.AID file uses the Student ID as its key, you can create a saved list using other files that use the Student ID as the file key, such as the SA.ACYR, CS.ACYR, or YS.ACYR files. However, remember that because the selection for this process looks to the FIN.AID file, only those students who have IDs in the FIN.AID file are selected for processing.

Step 17 - Save your work on this form.

Note: When the BAWD form has processed the records you have specified, it produces a report that lists all the students processed and indicates the previous amount awarded (if applicable), the incremental amount added or subtracted, and the new award amount. New and old award status is also provided, as well as a message explaining the status of the award after the batch update.

South Dakota Colleague System Procedures

Creating CS.ACYR Records

Responsibility:

Timeframe:

Use the Create CS.ACYR Records (CRCS) form to create CS.ACYR records for students without ISIRs. This allows your institution to package students for Institutional awards before their Institutional Student Information Record (ISIR) is received.

The CRCS process selects the students you indicate from the PERSON file. If the following records do not exist for the students you indicate, Colleague creates them:

①○ FIN.AID

①○ CS.ACYR

If the student has no FIN.AID record, Colleague creates one and populates the FA.FILE.YEARS field. If the student has no CS.ACYR record, Colleague creates one and calculates the CS.LOCATION if the SA.SATP.IDS field is blank.

ALERT! Colleague displays an error message if you try to run the CRCS process wide open. You must always enter a saved list, student IDs, or both when you run the CRCS process.

The CRCS form produces an output report. The output report lists each student processed, the location added, and the total number of students processed. If a FIN.AID record was created, a Y is displayed in the FinAid Added column.

South Dakota Colleague System Procedures

Transfer Monitoring Export (TMXP) Form

Responsibility:

Timeframe:

Use the Transfer Monitoring Export (TMXP) form to export students and their pertinent information to NSLDS in an Inform file. This process requests a Financial Aid History file for every student. It also requests that every student in the Inform file be placed on the transfer monitoring list so that your institution receives an Alert file when any changes occur on the student's NSLDS record.

Note: Colleague requires that you either enter a saved list, enter individual student IDs, or enter **Y** in the Additional Selection Criteria field before you run the TMXP process. This requirement protects you from accidentally exporting your entire student body by running the process wide open.

Note: For students to be exported, they must have an imported ISIR on file in Colleague, and be awarded. See *Using Financial Aid: Need Analysis (2005 Version)* for more information about transaction types.

Demographic information sent to NSLDS in the Inform file is extracted from each students' ISIR.DEMO record. Colleague uses the ISIR.DEMO record from the ISIR with the highest transaction number that also has a NSLDS transaction number.

The TMXP process does not send out students who currently have reject error codes. You must clear up the Transfer Monitoring errors in Colleague before exporting these students, or set the Allow Send field on the Transfer Monitoring Status (TMSS) form to **Y**. See online help for information about individual fields on the TMXP form.

South Dakota Colleague System Procedures

Transfer Monitoring Import (TMIM) Form

Responsibility:

Timeframe:

Use the Transfer Monitoring Import (TMIM) process to import student Transfer Monitoring information, including Acknowledgment and Error files, Alert files, and Financial Aid History files. The TMIM process brings Transfer Monitoring information into Colleague from the FA.RECEIVE.DIR. The information is placed in the FA.RECEIVE.DIR when you run the Department of Ed Import (DOEI) process to sweep your SAIG mailbox.

Colleague links incoming student information to existing Colleague IDs by Social Security Number (SSN). The TMIM process clears the imported NSLDS information from the FA.RECEIVE.DIR. Data imported via this process can potentially update the ISIR.NSLDS, ISIR.NSLDS.PELL, and ISIR.NSLDS.LOAN files. In addition, the TM.STUDENTS file is updated with information about the imported student. After you run the TMIM process, Colleague displays the Transfer Monitoring Response Report and a Batch Error report.

Output Savedlist

Enter a name for a saved list of the student IDs imported by this process. This saved list name can be used to run reports on the students just imported. See “Viewing Transfer Monitoring Status” 1 and “Troubleshooting the Transfer Monitoring Process” for information about reports.

South Dakota Colleague System Procedures

Transfer Monitoring Status (TMSS) Form

Responsibility:

Timeframe:

Use the Transfer Monitoring Status (TMSS) form to display information about a student's Transfer Monitoring status and to override calculated enrollment date information, if necessary. The demographic information shown on the TMSS form is populated from the federally flagged Institutional Student Information Record (ISIR) record. The ISIR.DEMO record from the ISIR with the highest transaction number with an NSLDS transaction number is displayed.

Overriding the Calculated Enrollment Date Information

The TMSS form displays the calculated enrollment date and its status. The enrollment date is initially set to the date on which you exported this student with the Transfer Monitoring Export (TMXP) form. You can override the date here, if necessary. When information for a student is resent, the enrollment date is reset to the new export date. If the date does not fall within an acceptable range, you may override it on this form prior to running the TMXP process.

South Dakota Colleague System Procedures

TM Alert Status Report (TMSR) Form

Responsibility:

Timeframe:

Use the TM Alert Status Report (TMSR) form to generate a report of students who have an Alert record as their most recent NSLDS information.

This report identifies overpayment situations and provides a complete history of the student's Pell grants and loans. On the report, the first line for each student provides identification and the student's office from the student's most current location.

If an overpayment situation has occurred, then the next one to three lines provide the type of overpayment and contact information to help resolve the overpayment. The remaining lines display all loans and Pell awards for the selected student. If a change has occurred for any loan or Pell award, a change flag is displayed. Loan detail lines also display the program code to the left of the school code for that given loan.

South Dakota Colleague System Procedures

TM Warning and Rejects Report (TMWR) Form

Responsibility:

Timeframe:

Use the TM Warning and Error Report (TMWR) form to produce a report listing students enrolled in the Transfer Monitoring process who have been imported with errors from the National Student Loan Data System (NSLDS). You may choose to display students with only warnings, students with only rejects, or students with both warnings and rejects. You can restrict the students included in the report by entering a saved list of student IDs or by entering individual student names or IDs. Students are selected and processed in alphabetical order by their last name.

The report displays the following information:

- Student ID
- Last name
- First name
- School code
- Error numbers
- Error type
- Error description

Use the report to correct any errors in students' Transfer Monitoring records.

South Dakota Colleague System Procedures

Reject Errors and Warning Codes

Responsibility:

Timeframe:

When you send an Inform file to NSLDS, the student information contained within it is evaluated. NSLDS immediately returns an Acknowledgement/ Error file back to you. The Acknowledgement/Error file acts as a receipt for the Inform file and lets you know whether any of the students on the Inform file had any reject errors and/or warning codes.

Reject Errors

Students with reject errors are not put on the NSLDS Transfer Monitoring list. You must fix the reject errors and resend the student information on a new Inform file before the student can be added to the list.

See list of reject codes and how to handle each.

- 001 No Alert Profile established. Export the student via the TMXP process. An Alert Profile is established by exporting an Inform file to NSLDS.
- 002 No header record. The TMXP process always includes a header record. Contact the Solution Center if you receive this reject error code.
- 003 Header record with invalid header title. The TMXP process always includes a header record. You should not receive this reject error. If you do, contact the Solution Center.
- 004 School/Branch does not exist in NSLDS. Check your CS.LOCATION and then read back to that location's information on the FAOP form. If the FAOP form isn't complete then look on the FIDF form. Colleague looks for the highest year in FA.CS.YEARS reading the location from CS.ACYR to go to the office looking for the OPEID. If there is nothing on the office level, then Colleague moves to the institution level.
- 005 Servicer and School/Branch association not found. Schools should contact NSLDS to retrieve their servicer code. This code should be on the CODP form in the NSLDS Servicer Code field.
- 006 Submittal Date is not a valid date. The TMXP process populates this date with the system date, which is a valid date upon export. You should not receive this reject error. If you do, contact the Solution Center.
- 007 Submittal Sequence Number is not numeric. The TMXP process builds this sequence number as a numeric value. You should not receive this reject error. If you do, contact the Solution Center.
- 008 Duplicate Submittal Date and Submittal Sequence Number combination. The second occurrence is a reject should be prevented from overwriting the first occurrence acceptance. You should not receive this reject error. If you do, contact the Solution Center.
- 009 SSN not numeric. The TMXP process validates the SSN before sending it. You should not receive this reject error. If you do, contact the Solution Center.
- 010 First name is all spaces The TMXP process does not include a student on the export record if the first name is blank. You should not receive this reject error. If you do, contact the Solution Center.
- 011 Last name is all spaces. The TMXP process does not include a student on the export record if the last name is blank. You should not receive this reject error. If you do, contact the Solution Center.
- 012 Date of Birth is an invalid date. The TMXP process does not include the student on the export record if the birth date is not valid. You should not receive this reject error. If you do, contact the Solution Center.
- 013 Enrollment Begin date is an invalid date. The TMXP process verifies the enrollment begin date as a valid date. You should not receive this reject error. If you do, contact the Solution Center.
- 014 Enrollment Begin date is less than current date minus 90 days. The TMXP process performs an edit against the Enrollment Begin Date. If it falls outside of this range, an error is generated and the Enrollment Begin Date is set to the system date. You should not

South Dakota Colleague System Procedures

- receive this reject error. If you do, access the Transfer Monitoring Status (TMSS) form to enter a valid enrollment date.
- 015 Enrollment Begin date is greater than current date plus 18 months (548 days). The TMXP process performs an edit against the Enrollment Begin Date, and if it falls outside of this range, an error is generated and the Enrollment Begin Date is set to the system date. You should not receive this reject error. If you do, access the Transfer Monitoring Status (TMSS) form to enter a valid enrollment date.
- 016 Monitor Begin date is invalid date. The Monitor Begin Date is always the date you exported via the Transfer Monitoring Export (TMXR) process, which is always a valid date. You should not receive this reject error. If you do, contact the Solution Center.
- 017 Delete from List Indicator is not Y or N. This field is always set to 'N'. Colleague is not designed to remove students from the monitoring process. You should not receive this reject error. If you do, contact the Solution Center.
- 018 School/Branch does not exist in NSLDS. Check your CS.LOCATION and then read back to that location's information on the FAOP form. If the FAOP form isn't complete then look on the FIDF form. Colleague looks for the highest year in FA.CS.YEARS reading the location from CS.ACYR to go to the office looking for the OPEID. If there is nothing on the office level, then Colleague moves to the institution level.
- 019 No trailer record The TMXP process always builds a trailer record. You should not receive this reject error. If you do, contact the Solution Center.
- 020 Trailer record with invalid trailer title. The TMXP process always sets this trailer title value. You should not receive this reject error. If you do, contact the Solution Center.
- 021 Trailer record count does not match number of detail records. The TMXP process will automatically calculate the record count every time. You should not receive this reject error. If you do, contact the Solution Center.
- 022 Trailer record count not numeric. The TMXP process creates this counter and it is a numeric value. You should not receive this reject error. If you do, contact the Solution Center.
- 023 Enrollment Begin date is current or future date and Monitor Begin date is greater than Enrollment Begin date. The Monitor Begin Date is always the date you exported via the Transfer Monitoring Export (TMXR) process. The Monitor Begin Date is never greater than the Enrollment Begin date if the Enrollment Begin Date is a future date. You should not receive this reject error. If you do, contact the Solution Center.
- 024 Monitor Begin date is less than current date plus 18 months (548 days) The Monitor Date is always the date you exported via the Transfer Monitoring Export (TMXR) process,. You should not receive this reject error. If you do, contact the Solution Center.
- 025 Monitor Begin date is greater than current date plus 18 months (548 days). The Monitor Date is always the current date. You should not receive this reject error. If you do, contact the Solution Center.
- 026 School/Branch on detail record not match School/Branch on header record. Colleague's export process sorts by OPEID and groups the students by OPEID within the matching header/trailer records. You should not receive this reject error. If you do, contact the Solution Center.
- 027 Record type invalid. The TMXP process creates these values. You should not receive this reject error. If you do, contact the Solution Center.
- 028 Request indicator not H, T, or B. The request indicator is always 'B.' Colleague is designed to always request an Alert file as well as a Financial Aid History file. You should not receive this reject error. If you do, contact the Solution Center.
- 100 Match on SSN. No match on DOB, Last Name, First Name. Colleague pulls the identifier fields from the ISIR.DEMO record from the ISIR with the highest transaction number that contains an NSLDS transaction number. This indicates that the SSN, DOB, and Last Name pass the Social Security Database match with CPS. Make sure the SSN, Date of Birth, and Last Name are accurate on the most recent ISIR. If this information is incorrect, correct it and import a new ISIR with corrected data. Then export the student via the TMXP process.
- 101 Student SSN not found. Colleague pulls the identifier fields from the most recent ISIR.DEMO record that has a match flag of 4 in the ISIR.RESULTS file. This indicates that the SSN, DOB, and Last Name pass the Social Security Database match with CPS. Make sure the SSN, Date of Birth, and Last Name are accurate on the most recent ISIR. If this information is incorrect, correct it and import a new ISIR with corrected data. Then export the student via the TMXP process.

South Dakota Colleague System Procedures

Warning Codes

Students with warning codes are put on the NSLDS Transfer Monitoring list. The warning codes let you know about potential problems with the student information.

- 701 Student SSN not found. (Student added to Monitoring list, but is not on Database.) Colleague pulls the identifier fields from the most recent ISIR.DEMO record that has a match flag of 4 in the ISIR.RESULTS file. This indicates that the SSN, DOB, and Last Name pass the Social Security Database match with CPS. Make sure the SSN, Date of Birth, and Last Name are accurate on the most recent ISIR. If this information is incorrect, correct it and import a new ISIR with corrected data. Then export the student via the Transfer Monitoring Export (TMXP) process.
- 702 Match on SSN. No match on DOB, Last Name, or First Name. (Student added to Monitoring list, but does not match information on Database.) Colleague pulls the identifier fields from the most recent ISIR.DEMO record that has a match flag of 4 in the ISIR.RESULTS file. This indicates that the SSN, DOB, and Last Name pass the Social Security Database match with CPS. Make sure the SSN, Date of Birth, and Last Name are accurate on the most recent ISIR. If this information is incorrect, correct it and import a new ISIR with corrected data. Then export the student via the TMXP process.
- 703 Delete requested for Student not on Monitoring list. The TMXP process always sets the Delete Request flag to 'N.' Colleague is not designed to remove students from the monitoring process. You should not receive this warning. If you do, contact the Solution Center.
- 704 Enrollment Begin Date is a past date; Monitor Begin Date changed to current date. Colleague sets the Monitor Date equal to the date the export was run. The Enrollment Date is the same date as the Monitor Date unless a user has overridden via the TMSS form. No action is necessary.
- 705 Successful match. Student has no selectable loans. You receive this warning code if the student demographic information is valid, but the student happens to not have any NSLDS history. For example, first year, first time students. No action is necessary.
- 706 Successful match. Student has no selectable loans and Pell grants. You receive this warning code if the student demographic information is valid, but the student happens to not have any NSLDS history. For example, first year, first time students. No action is necessary.

South Dakota Colleague System Procedures

TM Missing Responses Re-flag (TMMR) Form

Responsibility:

Timeframe:

The TM Missing Response Re-flag (TMMR) process automatically sets the Allow Send field on the Transfer Monitoring Student Status (TMSS) form. This process selects only the students whose Transfer Monitoring information was exported in the date range specified on this form but do not have imported information.

You can specify an output saved list, which gives you a list for use in the Transfer Monitoring Export (TMXP) process in order to resend the students. The TMMR process does not export to NSLDS. It only sets the Allow Send field for the students you indicate. To 'resend' these students, use the TMXP process.

See online help for information about individual fields on the TMMR form.

South Dakota Colleague System Procedures

Steps for Setting Up Return of Funds Processing

Responsibility:

Timeframe:

Use the high-level steps in Table 7-2 to set up Return of Funds processing at your institution.

Use the Award Period Definition (AWPD) form to enter the start and end dates of any periods of five or more consecutive days your institution will be closed during the award period.

“Entering Return of Funds Closed Days Data”

Enter the AR codes and/or categories for your institutional charges on the Define ROF AR Code/Category (DRAC) form.

“Defining Return of Title IV Funds AR Codes/Categories”

1. Specify how FSEOG funds are matched at your institution.
2. If your institution requires them, create additional Title IV categories.
3. Specify for each of your Title IV award funds, a Title IV category on the Award Definition (AWD) form. “Setting Up Title IV Categories”

South Dakota Colleague System Procedures

Entering Closed Days Data

Responsibility:

Timeframe:

Follow the steps below to enter your institution's closed days data.

Step 1 - Access the Award Period Definition (AWPD) form.

Step 2 - Enter an award period or use LookUp to find the award period you need.

Step 3 - In the Closed Days group, enter the start date for a period of five or more consecutive calendar days that your institution will be closed during the award period.

Step 4 - Enter the end date for the period of closed days.

Step 5 - Repeat Step 3 and Step 4 for any additional periods of five or more consecutive calendar days for the award period.

Step 6 - Save your work on the AWPD form.

South Dakota Colleague System Procedures

Specifying FSEOG Matching

Responsibility:

Timeframe:

??? field on the TLCM form. Your entry determines whether 75% or 100% of the FSEOG funds awarded and disbursed to the student are used during return of Title IV funds processing.

Step 1 - Access the Title IV Category Maintenance (TLCM) form.

Step 2 - Enter **FSEOG** at the LookUp prompt. The TLCM form displays the data for the Datatel-delivered FSEOG Title IV category code.

Step 3 - Go to the FSEOG and 75% Federal Funds field. If you use the individual funding method, enter **Y** (the default entry). If you use the aggregate funding method, enter **N**. If you use the fund specific method, enter **N**.

Step 4 - Save your work on the TLCM form.

South Dakota Colleague System Procedures

Maintaining/Adding Title IV Categories

Responsibility:

Timeframe:

Follow the steps below to maintain or add Title IV category codes.

Step 1 - Access the Title IV Category (TLCM) form.

Step 2 - Enter a Title IV category code or use LookUp to find the code you need.

Step 3 - Enter a description of the Title IV category in the Description field.

Step 4 - Enter in the Return Priority field a numeric value from 1 to 9 to indicate the priority for return of funds processing, with 1 being the highest priority. Funds in a category with higher priority are returned first.

Step 5 - Enter in the Post With Disb Priority field a numeric value from 1 to 9 to indicate the priority for post-withdrawal disbursement processing, with 1 being the highest priority. Funds in a category with higher priority are disbursed first.

The Title IV categories delivered with the TLCM form reflect the Department of Education's (ED's) requirements for order of return of Title IV funds as set forth in federal regulations. Modify the delivered codes only to reflect changes in federal regulations.

Similarly, should you find it necessary to add Title IV codes to meet your institution's requirements based on your existing award categories, ensure that the categories you create do not modify the order of return of Title IV funds specified in federal regulations.

ALERT! Ensure that the priority you enter in this field does not modify the order of return specified in federal regulations.

ALERT! Ensure that the priority you enter in this field does not modify the order of return specified in federal regulations.

Step 6 - If you want awards in this category prorated to reflect the student's enrollment status, enter **Y** in the Use Proration field. If you do not want awards in this category prorated, enter **N** or leave the Use Proration field blank.

Step 7 - If this category applies to FSEOG funds, see "Procedure for Specifying FSEOG Matching" 5 beginning with Step 3. If this category does not apply to FSEOG funds, enter **N**.

Step 8 - Save your work on the TLCM form.

South Dakota Colleague System Procedures

Mapping Title IV Codes for Individual Award Funds

Responsibility:

Timeframe:

Follow the steps below to assign the appropriate Title IV category to each of your institution's Title IV award funds.

Step 1 - Access the Award Definition (AWD) form.

- Have the list of awards representing Federal funds handy when you are ready to map your Title IV Categories.

Step 2 - Enter an award code for a Title IV award or use LookUp to find the code you need.

Step 3 - In the TIV Category field, enter the appropriate Title IV category for this award or use LookUp to find the code that you need.

Step 4 - Save your work on the AWD form.

Step 5 - Repeat Step 1 through Step 4 for each of your Title IV award funds.

ALERT! Be sure you have followed the “Procedure for Specifying FSEOG Matching” before you begin mapping your Title IV codes for individual award funds.

Note: You must complete this procedure for each of your Title IV award funds in order for return of Title IV funds processing to work correctly.

South Dakota Colleague System Procedures

Defining AR Codes/Categories

Responsibility:

Timeframe:

Follow the steps below to define AR codes and categories that represent your institutional charges.

Step 1 - Access the Define ROF AR Code/Category (DRAC) form.

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

Step 3 - If your institution uses AR categories to group AR codes, go to Step 4. If your institution does not use AR categories, go to Step 6.

Step 4 - In the Accounts Receivable Categories group, enter AR categories that you want to define as institutional charges or use LookUp to find the categories you need.

Step 5 - If your institution uses other AR codes in addition to those defined by the AR categories you entered in Step 4 to define institutional charges, then:

a. Enter the codes in the Accounts Receivable Codes group or use LookUp to find the codes you need.

b. Go to Step 7.

If your institution doesn't use AR codes in addition to specific AR categories to define institutional charges, go to Step 7.

Step 6 - Enter the AR codes for institutional charges at your institution. Enter the code or use LookUp to find the code you need.

Step 7 - Save your work on this form.

Technical Tip: The AR categories you enter on this form are stored in the ROF.INST.CHARGES file for the academic year.

South Dakota Colleague System Procedures

Calculating Return of Title IV Funds

Responsibility:

Timeframe:

Follow the steps below to calculate return of Title IV amounts.

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

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

Step 3 - Enter the student's name or ID number or use Person LookUp to find the record you need.

Step 4 - Detail on the Awd Per group.

Step 5 - At the displayed mini-menu, select the Calculate Return of Funds (ROFC) form. The ROFC form is displayed.

Step 6 - Accept the displayed W/D Det (Withdrawal Determination) Date or enter a new date.

Step 7 - Accept the default Enroll Status or enter an override status.

Step 8 - Accept the W/D (Withdrawal) Date or enter an override.

Step 9 - Accept the default Compl Days or enter an override.

Step 10 - Accept the default Total Days or enter an override.

Note: Regardless of whether or not the Completed Days field contains an override value, when a withdrawal date is entered or you return through the Completed Days field, the student's completed days will be recalculated.

Note: The Total Days field is not recalculated if the withdrawal date is overridden.

Step 11 - Accept the default Inst Charges or enter an override.

Step 12 - Calculate return of Title IV funds amounts for the student by detailing on the Calculate field.

Step 13 - If you want to update the student's SA.ACYR and TA.ACYR files with these return of Title IV funds amounts, enter **Y** in the Update Student Aid field. If you do not want to update the student's files, leave the Update Student Aid field blank or enter **N**.

Step 14 - If you want to make additional overrides and recalculate the student's return of Title IV funds amounts, repeat steps Step 6 through Step 13. If you want to update the student's files with the calculated return of Title IV funds amounts, save your changes on the ROFC form.

Step 15 - Save your changes on the AIDE form.

Note: Override the Disb Amt for nontransmittable awards, and set the F(reeze) flag to **x**. Then recalculate to get the correct figures in the Schl Owes, Stdnt Owes, and Disb Due columns.

South Dakota Colleague System Procedures

ALERT! Once you update the student's records with these return of Title IV funds amounts, you are prevented from running the calculation again.

Note: You must save your changes on the ROFC form and the AIDE form for the student's files to be updated.

Note: Be sure to enter **N** in or leave blank the Update Student field until you are satisfied with the calculation result. You have an additional opportunity to cancel return of funds calculation when you return from the ROFC form to the AIDE form. When you cancel your changes on the AIDE form, the return of funds calculation is canceled as well.

Note: You still have the option to cancel the return of Title IV amounts you saved on the ROFC form by cancelling your changes on the AIDE form.

South Dakota Colleague System Procedures

Restoring Data for Calculation Made in Error

Responsibility:

Timeframe:

If you have mistakenly saved your changes on the ROFC form with the Update Student Aid field set to **Y**, you have the ability to manually restore the student's original award data. Complete the steps below to manually restore the student's award data to the original amounts.

Step 1 - Print a paper copy of the Detail Return of Funds (ROFD) report for the student for the award period and retain the copy.

Step 2 - Run the Return of Funds Purge (ROFP) process for the student for the award period. The student's data is deleted from the ROF.ACYS file.

Step 3 - Go to the Detail Award View (DAV) form for the academic year and the student.

Step 4 - At the Award LookUp prompt, enter the code for an award from the ROFD report.

Step 5 - In the Award Period Information group, move your cursor to the award period for which you erroneously calculated return of funds amounts.

ALERT! Be sure to retain a paper copy of the ROFD report. The Orig Amt in the report are deleted from the ROF.ACYS file in the next step and you will need to enter those amounts in Step 6.

Technical Tip: If a Title IV award in the award period has a nonawarded action category (an action category entered in the Non-Awarded Action Categories field on the FA Awarding Parameters [FAAP] form), the Orig Amt for the award on the ROFD report is listed as zero.

Step 6 - In the Amount field, enter the amount in the Orig Amt field of the ROFD report for this award.

Step 7 - Reset the eligibility flags for the award for this award period.

- a. Move your cursor to the Over E field for the same award period.
- b. Delete the **Y** in the Over E field.
- c. Move your cursor to the Over T field
- d. Delete the **Y** in the Over T field.

Step 8 - Save your changes on the DAV form.

Step 9 - Repeat Step 4 through Step 8 for each of the awards that are listed for the student on the ROFD report. You can now recalculate the student's return of funds data.

Note: Type the new amount over the old amount.

Technical Tip: When Colleague updates the student's records during return of funds processing, award eligibility is transferred to the student level (setting the flags to Y) and then the eligibility criteria are deleted at the student level to enable full transmittal for returns/ disbursements. When you delete the **Y** entries in these fields, you enable Colleague to use the transmittal and eligibility criteria specified for the award.

South Dakota Colleague System Procedures

Summary Return of Funds Rprt (ROFS) Form

Responsibility:

Timeframe:

Follow the steps below to produce the Summary Return of Funds (ROFS) Report.

Step 1 - Access the Summary Return of Funds (ROFS) form.

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

Step 3 - Enter an award period or use LookUp to find the award period you need.

Step 4 - If you want to use a saved list of students IDs from the PERSON file to specify students for the ROFS report, enter the list name in the Input Saved List Name field. **If** you do not want to use a saved list to select student records for the ROFS report, leave the Input Saved List Name field blank.

Step 5 - If you want to enter student IDs to select records for the ROFS report, enter the student IDs in the Students group or use LookUp to help you find the records you need. **If** you do not want to use student IDs to select records for the report, leave the Students group blank.

Step 6 - If you want to enter additional selection criteria to further narrow the list of records the ROFS report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. **If** you do not want to enter additional selection criteria, go to Step 7.

Step 7 - Save your changes on the ROFS form.

South Dakota Colleague System Procedures

Detail Return of Funds Report

Responsibility:

Timeframe:

Use the Detail Return of Funds Report (ROFD) form to generate a detailed return of funds report for the students you select for a given academic year and award period. This report provides information from the Return of Funds (ROF.ACYR) file.

Note: This report should always be run prior to the return of funds purge process.

South Dakota Colleague System Procedures

Purging Data from the ROF.ACYR File

Responsibility:

Timeframe:

Follow the steps below to purge data from the ROF.ACYR file.

Step 1 - Access Return of Funds Purge (ROFP) form.

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

Step 3 - Enter an award period or use LookUp to find the award period you require.

Step 4 - If you want to select records to purge, but only simulate the purge process (to ensure that you are selecting the appropriate records for deletion) enter **N** in the Update field. If you want to delete the specified return of funds records for the specified academic year, award period, and students, enter **Y** in the Update field.

Step 5 - If you want to use a saved list of students IDs from the PERSON file to specify the students whose return of funds records to delete from the ROF.ACYR file for the academic year and award period you select, enter the list name in the Input Saved List Name field. If you do not want to use a saved list to select student records to delete from the ROF.ACYR file, leave the Input Saved List Name field blank.

Step 6 - If you want to enter student IDs to select return of funds records to purge from the ROF.ACYR form, enter the student IDs in the Students group or use LookUp to help you find the records you need.
If you do not want to use student IDs to select records to purge, leave the Students group blank.

Note: You are required to enter either a saved list name in this field or individual student IDs in the Students group before you can save your changes on the ROFP form.

Note: You are required to enter either a saved list name in the Input Saved List Name or individual student IDs in the Students group before you can save your changes on the ROFP form.

Step 7 - Save your changes on the ROFP form. When you complete this form, the student records for the academic year and award period are deleted from the ROF.ACYR file.

South Dakota Colleague System Procedures

Entering FA Student Comments

Responsibility:

Timeframe:

Follow the steps below to enter FA student comments.

Step 1 - Access the FA Student Comments (STCM) form.

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

Step 3 - Enter the student's name or ID number or use Person LookUp to find the record you need.

Step 4 - Go to the appropriate comments field. For example, to enter verification comments, go to the Verification Comments field.

Step 5 - Detail to the UTED form to enter comments.

Step 6 - Enter # (the pound sign) and press Enter to stamp your comments with the time/date and your login initials.

Step 7 - On a new line, enter your comments.

Step 8 - Ensure that the comments you have entered are separated from any preceding comments by a blank line.

Step 9 - Save your work on the UTED form. The STCM form is displayed.

Step 10 - Enter other comments or save your work on the STCM form.

South Dakota Colleague System Procedures

FA Award History Summary (AWSU) Form

Responsibility:

Timeframe:

Use the FA Award History Summary (AWSU) form to view multiple years of award data for a particular student. The form also allows you to detail to the Award Detail Entry (AIDE) form to view details about a specific award year.

The following fields display detailed information about the award history of a particular student.

Year

Lists the years for which the selected student has received awards. You may detail to the AIDE form from this field to view more detailed records about the selected award year. Colleague displays the information for the term listed first in the attendance pattern defined in the SA.ACYR file for that year. For more information about the AIDE form see “Understanding the Award Detail Entry (AIDE) Form” .

Awarded Total

Displays the amount awarded to the selected student during the year. Only awards with one of the following action category statuses are included in the award total:

- Accepted
- Estimated
- Pending

Transmitted

Displays the amount transmitted to the selected student’s account during the year.

ROF (Return of Funds)

Indicates whether any return of funds to the Federal government took place during the year for the selected student. If any funds at all were returned in a given year, a Y is displayed in that year’s row.

Warning Messages

FA235 - ‘No summary award data is available for student xxxxxx in FA year xxxx’

Message: *WARNING: No summary award data is available for student xxxxxx in FA year xxxx.*

Cause: Award processing was begun for this student, but no awards were ever assigned. Because no awards were assigned, there is no summary award data available for this student.

Solution: No action is required. The warning message is for informational purposes only.

South Dakota Colleague System Procedures

High-Level SAP Setup Steps

Responsibility:

Timeframe:

Setting up SAP processing requires the following high-level steps:

1. Use the Academic Program Requirements (APRS) form to maintain the maximum or minimum allowable credits for an academic program. See "Understanding Academic Program Requirements".
2. Use the SAP Type Definition (SPTD) form to identify:
 - The type of academic credit records (STUDENT.ACAD.CRED) to be accumulated for a SAP calculation.
 - The SAP status to be assigned to a student based on the results of the SAP calculation.
 - Alternate grade definitions to be used for the SAP calculation. See "Understanding SAP Types"
3. Use the SAP Grade Definition (SPGR) form to override the grade code parameters of an academic grade scheme for SAP calculation. See "Understanding SAP Grade Definitions"
4. Use the SAP Appeal Action Codes (SPAC) form to define action codes for SAP appeals. See "Understanding SAP Appeal Action Codes".

South Dakota Colleague System Procedures

Setting Up SAP Types

Responsibility:

Timeframe:

Complete the following steps to set up a SAP type.

Step 1 - Access the SAP Type Definition (SPTD) form.

- Colleague displays the SPTD form with the cursor at the SAP Type LookUp prompt.

Step 2 - Enter the ID of the SAP type that you want to maintain.

Step 3 - In the Description field, enter a brief description of the SAP type. This description displays with the SAP Type ID. Use the description to describe the purpose and intended use of this SAP type so that you can easily distinguish this SAP type from others.

- This field is required.

Step 4 - In the Comments field, detail to enter free-form comments about the SAP type. Colleague displays the UTED form. Finish or update from the UTED form to return to the SPTD form. Colleague displays an “X” in the Comments field if there are comments associated with this SAP type. To date stamp your comments while on the UTED form, type “#” as the first and only character of the row, then press Enter.

Step 5 - If desired, in the Transcript Grouping field, use Transcript Groupings LookUp to select a transcript grouping. You can detail on this field to maintain a transcript grouping or add a new transcript grouping. Colleague displays the Transcript Groupings (TRGR) form. For more information, see “Transcript Grouping”.

Step 6 - If desired, in the Activity Eligibility Rules group, use SAP Type Eligibility Rules LookUp to select or create (Add) a rule. If you enter a transcript grouping and an activity eligibility rule table, Colleague uses the transcript grouping as a basis for selecting academic credits and then narrows the selection using the academic credits selected by the rule table. You can detail on this field to maintain a rule or add a new rule. Colleague displays the Rules Definition (RLDE) form. The primary view for activity eligibility rules is the STUDENT.ACAD.CRED file. For more information, see “Activity Eligibility Rules”.

Step 7 - If desired, in the Eligibility Subroutine field, enter a subroutine name. If you enter a transcript grouping and an eligibility subroutine, Colleague uses the transcript grouping as a basis for selecting academic credits and then narrows the selection using the academic credits selected by the subroutine. For more information, see “Eligibility Subroutine”.

Step 8 - In the Default SAP Status field, enter a default SAP status for this SAP type. Colleague defaults the SAP status you enter here into a student’s record if no SAP status is assigned to that student by the SAP status rule table or if there is no SAP status rule table. For more information, see “Default SAP Status”. Press field help twice to view a list of valid SAP statuses.

- This field is required.

Step 9 - In the SAP Status Rule field, use SAP Status Rules LookUp to select or create (Add) a rule. You can detail on this field to maintain a rule or add a new rule. Colleague displays the Rules Definition (RLDE) form. The primary view for SAP status rules is the SAP.RESULTS file. For more information, see “SAP Status Rule Table”.

South Dakota Colleague System Procedures

Step 10 - In the SAP Status field, enter the SAP status to be set if the rule is passed. Press field help twice to view a list of valid SAP statuses.

Step 11 - In the Grade Schemes field, use Grade Schemes LookUp to select or create (Add) an alternate SAP type grade definition. You can detail on this field to maintain a SAP grade definition. Colleague displays the SAP Grade Definition (SPGR) form. For more information, see “Alternate Grade Definitions”.

Step 12 - Save the SAP type.

Note: Pay close attention to the order of the rules in your rule table. Colleague uses the first true rule in the table and ignores all subsequent rules.

South Dakota Colleague System Procedures

Setting Up SAP Grade Definitions

Responsibility:

Timeframe:

Complete the following steps to set up a SAP grade definition.

Step 1 - Access the SAP Grade Definition (SPGR) form. Colleague displays the SPGR form with the cursor at the SAP Type LookUp prompt.

Step 2 - Enter the SAP type for which you wish to override grade code parameters. The SAP type identifies the academic credits to be accumulated for a SAP calculation. For more information, see “Understanding SAP Types”.

Step 3 - Use the Grade Scheme LookUp to select the grade scheme for this SAP type for which you wish to override grade code parameters. In the Grade Definition section, Colleague displays the parameters defined by the Registrar for the grade codes in this grade scheme. In the SAP Type Override section, Colleague displays any grade code parameter overrides for this grade scheme for this SAP type. A grade scheme comprises a group of grade codes. Grade schemes defined by the Registrar are maintained on the Grade Schemes (GRSC) form. For more information, see the Academic Records part of the *Getting Started with Colleague Student* manual on defining grades.

Step 4 - In the Grade field, detail on a grade to override the grade code parameters for this grade scheme for this SAP type. Colleague displays the SAP Grade Codes (SPGC) form for the selected grade code. The current SAP grade code overrides are maintained on the left side of the form. The grade code parameters defined by the Registrar are displayed on the right side of the form. Grade code parameters defined by the Registrar are maintained on the Grade Codes (GCRC) form. For more information, see the Academic Records part of the *Getting Started with Colleague Student* manual on defining grades.

Step 5 - In the Grade Value field, enter the grade point value override for this grade code. This override applies only to this grade code for this grade scheme for this SAP type and is used only for FA. The grade point value must be greater than or equal to zero.

Step 6 - In the Include in Attempted Credits field, enter a yes override to indicate whether the academic credits associated with this grade are to be used to calculate the student's attempted credits. This override applies only to this grade code for this grade scheme for this SAP type.

Step 7 - In the Include in Completed Credits field, enter a yes override to indicate whether the academic credits associated with this grade are to be used to calculate the student's completed credits.

Step 8 - In the Include in GPA Credits field, enter a yes override to indicate whether the academic credits associated with this grade are to be used to calculate the student's GPA credits. This override applies only to this grade code for this grade scheme for this SAP type.

Step 9 - In the Include Replaced in Attempted Credits field, enter a yes override to indicate whether the academic credits associated with this grade are to be used to calculate the student's attempted credits if the student retakes a course. This override applies only to this grade code for this grade scheme for this SAP type.

South Dakota Colleague System Procedures

Step 10 - In the Include Replaced in Completed Credits field, enter a yes override to indicate whether the academic credits associated with this grade are to be used to calculate the student's completed credits if the students retakes a course. This override applies only to this grade code for this grade scheme for this SAP type.

Step 11 - In the Include Replaced in GPA Credits field, enter a yes override to indicate whether the academic credits associated with this grade are to be used to calculate the student's GPA credits if the student retakes a course. This override applies only to this grade code for this grade scheme for this SAP type.

Step 12 - Update from the SAP Grade Codes (SPGC) form.

- Colleague returns to the SAP Grade Definition (SPGR) form.

Step 13 - Update from the SAP Grade Definition (SPGR) form.

Note: To save your SAP grade parameters, you must update from all forms from which you detailed to access the SPGC form.

South Dakota Colleague System Procedures

Setting Up SAP Appeal Action Codes

Responsibility:

Timeframe:

Complete the following steps to set up a SAP appeal action code.

Step 1 - Access the SAP Appeal Action Codes (SPAC) form. Colleague displays the SPAC form with the cursor at the SAP Type LookUp prompt.

Step 2 - Enter the SAP appeal action code that you want to maintain.

Step 3 - In the Description field, enter a brief description of the SAP appeal action code. This description displays with the SAP appeal action code. Use the description to describe the purpose and intended use of this SAP appeal action code so that you can easily distinguish this SAP appeal action code from others.

Step 4 - In the Set Override SAP Status field, if desired, enter the override SAP status to be set when this action code is entered against a SAP calculation. A SAP appeal action code can be set up to automatically override a calculated SAP status, such as when a SAP appeal is granted.

Step 5 - In the Remove Override SAP Status field, if desired, enter Y to remove an override SAP status when this action code is entered against a SAP calculation. A SAP appeal action code can be set up to remove an override SAP status, such as when a SAP appeal is canceled. The current SAP status reverts to the "calculated" SAP status.

Step 6 - In the Communication Code field, if desired, use Comm Code LookUp to select a communication code to be used to update the Communications Management module when this action code is entered against a SAP calculation. The communication code will record, for the student, that an appeal action was entered or trigger additional events in the Communications Management module.

Step 7 - In the Communication Code Status field, if desired, enter the default status of correspondence received to be assigned to the student when this action code is entered against a SAP calculation. A communication status code may be set up to trigger certain events or actions when attributed to a communication code.

Step 8 - Save the SAP appeal action code.

Note: If you enter a communication code in the this field, you must also enter a status in the Communication Code Status field.

South Dakota Colleague System Procedures

Calculating SAP Status

Responsibility:

Timeframe:

Complete the following steps to perform a SAP calculation for one or more students.

Step 1 - Access the Batch SAP Calculation (SAPC) form. Colleague displays the SAPC form with the cursor at the Term LookUp prompt.

Step 2 - Use Term LookUp to select the academic term through which academic credits are to be accumulated for the SAP calculation. Colleague automatically defaults the end date of the selected academic term in the Calculation through Date field.

Note: If your institution is not term-based, leave the Calculation through Term field blank and go to Step 3.

Step 3 - In the Calculation through Date field, if necessary, enter the date through which academic credits are to be accumulated for the SAP calculation. Colleague accumulates academic credits through the academic term entered in the Calculation through Term field or the date entered in this field, whichever is later. For more information, see “Evaluation Period”

Step 4 - In the Store Results field, enter **Y** to run the SAP calculation in update mode; otherwise, enter **N** to simulate the SAP calculation. In update mode, Colleague performs the SAP calculation and stores the results in the SAP.RESULTS file. Colleague can also generate an audit report based on the code in the Audit Report Options field. In simulation mode, Colleague performs the SAP calculation for the purposes of generating an audit report. However, Colleague does not store the SAP calculation results.

- This field is required.

Step 5 - In the Audit Report Options field, enter an audit report option code. SAP audit report option codes are used to indicate the type of audit report produced by the Batch SAP Calculation (SAPC) process. For more information, see “Audit Report”. Press field help twice to view a list of valid entries for this field.

- This field is required.

Step 6 - In the SAP Types group, use SAP Type LookUp to select a SAP type that represents the type of academic credits to be accumulated for the SAP calculation. A SAP calculation can be performed for more than one SAP type. For more information, see “Academic Credits”

Note: If your institution is not term-based, you must enter a calculation through date.

Step 7 - If desired, in the Saved List Name field, use List Name LookUp to select a saved list of student records for the SAP calculation. Your saved list must contain a list of IDs from the FIN.AID file. Colleague compares the IDs in your saved list to the record IDs in the FIN.AID file and restricts your selection to the records that match.

Step 8 - If desired, in the Academic Levels field, use the Academic Levels LookUp to select, by academic level, students for SAP calculation. Colleague restricts your selection of students from the FIN.AID file to those with a *current* academic program at the selected academic level.

South Dakota Colleague System Procedures

Step 9 - If desired, in the Academic Programs field, use Academic Programs LookUp to select, by academic program, students for SAP calculation. Colleague restricts your selection of students from the FIN.AID file to those with the selected *current* academic program. For information about how Colleague determines a student's current academic program for the purpose of SAP calculation, see "Current Academic Program".

Step 10 - If desired, in the FA Applicants group, use Person Lookup to select students for the SAP calculation. Colleague uses the saved list, if any, as a basis for selecting students from the FIN.AID file and then narrows the selection using the person IDs in the Students group.

Step 11 - In the Additional Selection Criteria field, enter **Y** to specify additional selection criteria; otherwise, enter **N**.

ALERT! If a student has multiple active academic programs, Colleague uses the academic programs in this group (starting with the first item) to select the student's *current* academic program.

If you:

- ⓪ leave the Saved List Name field blank;
- ⓪ leave the Academic Levels group blank;
- ⓪ leave the Academic Programs group blank;
- ⓪ leave the FA Applicants group blank; and
- ⓪ do not construct any additional selection criteria,

Colleague selects *all* students in the FIN.AID file for the SAP calculation. Construct selection criteria based on information in the FIN.AID file.

Step 12 - Finish or update from the SAPC form.

South Dakota Colleague System Procedures

Recording a New SAP Appeal Action

Responsibility:

Timeframe:

Complete the following steps to record a new SAP appeal action.

Step 1 - Access either the SAP View (SAPV) form or the SAP Detail View (SAPD) form.

Note: You cannot add a new appeal action by accessing the SAP Appeals (SAPA) form directly. Direct access of the SAPA form only allows you to view an existing appeal action.

Step 2 - Use Student Lookup to select the student for whom you want to enter an appeal action.

①○ If you accessed the SAP View (SAPV) form at the menu prompt, Colleague displays the SAPV form.

①○ If you accessed the SAP Detail View (SAPD) form at the menu prompt, Colleague displays the SAP Results LookUp prompt.

On the SAPV form, Colleague displays a summary of SAP calculation for the student. On the SAPD form, only the SAP calculations for the selected student are available from the SAP Results LookUp prompt.

Step 3 - Select the SAP calculation for which you want to enter an appeal action.

①○ On the SAP View (SAPV) form, in the Satisfactory Academic Progress Calculations group, detail on a SAP calculation.

①○ On the SAP Detail View (SAPD) form, use SAP Results Lookup.

Colleague displays the SAP Detail View (SAPD) form. The SAPD form displays the details of the SAP calculation and a history of SAP appeals actions for the SAP calculation.

Step 4 - In the SAP Appeals History group, detail on a blank row. Colleague displays the SAP Appeals (SAPA) form. The SAPA form displays the detail of a SAP appeal action.

Note: To maintain an existing appeal action, simply detail on the appeal action.

Step 5 - Enter the date of the SAP appeal action. You can "back date" or "future date" the date of the appeal action. You can only "future date" up to 120 days from the current date. The SAP appeal history displayed in the SAP Details (SAPD) form lists the appeal actions in descending chronological order based on appeal date. This field is required.

Step 6 - In the Appeal Originator field, use Staff LookUp to select the staff code of the staff person originating this appeal action.

Note: To edit this field, delete the data in the field then go back to the field. Colleague displays the Staff LookUp prompt.

Step 7 - In the FA Counselor field, use Staff LookUp to select the staff code of the FA counselor for this appeal action.

Step 8 - In the Appeal Action field, enter an appeal action code. If the selected appeal action code has been defined to set an override SAP status, Colleague displays the override SAP status on the SAP Appeals (SAPA) form.

South Dakota Colleague System Procedures

If the selected appeal action code has been defined to remove an override SAP status, Colleague removes the override SAP status from the SAP Appeals (SAPA) form. Use the SAP appeal action code resolution form to view the details of the appeal action code. For information about appeal action codes, see “Understanding SAP Appeal Action Codes”.

Step 9 - In the SAP Comments group, enter free-form comments about the student’s SAP. SAP comments are associated with the student and are not calculation- or year-specific. This field may contain comments related to other calculations and award years. You can detail on any row to display a full UTED form. To date stamp your comments while on the UTED form, type “#” as the first and only character on a row, then press Enter.

Step 10 - Update from the SAP Appeals (SAPA) form.

- Colleague returns to the SAP Detail View (SAPD) form.

Note: To edit this field, delete the data in the field then go back to the field. Colleague displays the Staff LookUp prompt.

ALERT! To save your appeal action, you must update from all forms from which you detailed to access the SAP Appeals (SAPA) form.

Step 11 - Update from the SAP Detail View (SAPD) form and, if necessary, the SAP View (SAPV) form.

Note: If a communications code has been associated with the appeal action code, the Communications Management module will be notified. For information about appeal action codes, see “Understanding SAP Appeal Action Codes”.

South Dakota Colleague System Procedures

SAP Management Report

Responsibility:

Timeframe:

Complete the following steps to produce a SAP management report.

Step 1 - Access the SAP Management Report (SAPM) screen.

- Colleague displays the SAPM screen with the cursor in the Saved List Name field.

Step 2 - If desired, use List Name LookUp to select a saved list of SAP results to include in the SAP management report.

Step 3 - If desired, in the SAP Calcs From/To Date fields, enter one or more calculation dates to limit your selection of SAP results to be included in the report. There are two fields. The first field is for the start date; the second field is for the end date. You can enter a start date only, an end date only, or both a start date and an end date.

Step 4 - If desired, in the SAP Types group, use SAP Type LookUp to select a SAP type to limit your selection of SAP results to be included in the report. Colleague uses the saved list, if any, as a basis for selecting records from the SAP.RESULTS file and then narrows the selection using the SAP types in the SAP Types group.

Step 5 - If desired, in the Current SAP Status group, enter a SAP status to limit your selection of SAP results by current SAP status. The current SAP status is the SAP status, calculated or override, currently associated with the SAP calculation. For more information, see “Current SAP Status”. Press field help twice to view a list of valid SAP statuses.

Step 6 - If desired, in the Limit to SAP Status with Appeals field, enter **Y** to limit your selection of SAP results to those against which an appeal action has been tracked; otherwise, enter **N**.

Step 7 - If desired, in the Students group, use Student LookUp to limit your selection of SAP results by student. Colleague uses the saved list, if any, as a basis for selecting records from the SAP.RESULTS file and then narrows the selection using the student IDs (SAPR.STUDENT.ID) in the Students group.

Step 8 - If the Additional Selection Criteria field, enter **Y** to specify additional selection criteria; otherwise, enter **N**.

If you:

- leave the Saved List Name field blank;
- leave the SAP Calcs From/To Date fields blank;
- leave the SAP Types group blank;
- leave the Current SAP Status group blank;
- leave the Limit to SAP Status with Appeals field blank;
- leave the Students group blank; and
- do not construct any additional selection criteria,

Colleague selects *all* records in the SAP.RESULTS file for the SAP management report. Construct selection criteria based on information in the SAP.RESULTS file.

Step 9 - Finish or update from the SAPM screen.

South Dakota Colleague System Procedures

High-Level Setup Steps for FISAP Reporting Setting up Annual Parameters

Responsibility: **Each institution (Director of Financial Aid or designee) must process the data for the FISAP by the September deadline each year.**

NOTE; Only one institution can be running the FISAP programs at a time. FFAP is unique for each institution since the aid Id's and degree types will vary from school to school. Institutions will need to schedule their time (usually several days) with the other institutions.

Timeframe: **August 1 to last Friday in September -- FISAP must be electronically transmitted by the last Friday in September each year.**

Complete the following steps to set up annual parameters.

Step 1 - Access the FA FISAP Annual Parameters (FFAP) form.

Step 2 - At the Academic Year Lookup, enter the year for which you want to set parameters.

Step 3 - In the Reporting Start Date field, enter the start date of the FISAP report.

Step 4 - In the Reporting End Date field, enter the end date of this FISAP report.

Step 5 - In the five fields describing federal terms (Summer [Beg], Fall, Winter, Spring, Summer [End]), enter **Y** to check full-/part-time enrollment.

Step 6 - At the Enter and Acad Program Lookup, enter an academic program that is an exception to the standard federal terms.

Step 7 - For each academic program, you can enter **Y** to check full-/part-time enrollment in this federal term.

Step 8 - In the Federal Perkins Loan field, enter the award code(s) to be evaluated for the Federal Perkins Loan program.

Step 9 - In the Federal SEOG field, enter the award code(s) to be evaluated for the Federal SEOG program.

Step 10 - In the Federal Work Study field, enter the award code(s) to be evaluated for the Federal Work Study program.

Step 11 - In the Prof/Bacc Degree Types field, enter the degree type(s) (PROF, BACC, or OTHER) to be considered for students to be labeled on the EAAP report as having a degree.

South Dakota Colleague System Procedures

FISAP Reporting

Responsibility: **Each institution (Director of Financial Aid or designee) must process the data for the FISAP by the September deadline each year.**

NOTE; Only one institution can be running the FISAP at a time. EAAP and PRDR data will be unique for each institution based on the data entered on FFAP. Institutions will need to schedule their time (usually several days) with the other institutions.

Timeframe: **August 1 to last Friday in September. FISAP must be electronically transmitted by the last Friday of September each year.**

Colleague can assist you in gathering the information needed for this report. In order to do this, you must first set up several forms in order to set up annual parameters and income ranges.

- ①○ Set up the FISAP annual parameters on the FA FISAP Annual Parameters (FFAP) form.
- ①○ Set up the income ranges on the following forms:
 - Eligible Aid Applicants - Dep (EAAD) form
 - Eligible Aid Applicants - Ind (EAAI) form
 - Program Summary - Dep (ADPS) form
 - Program Summary - Ind (ADPI) form

Setting Up Eligible Aid Applicants Data for Dependent Students

Complete the following steps to set up the eligible aid applicants data for dependent students.

Step 1 - Access the Eligible Aid Applicants - Dep (EAAD) form.

Step 2 - In each income range, enter the lower limit of the income range under the From column.

Step 3 - When you are finished, save your work.

Setting Up Eligible Aid Applicants Data for Independent Students

Complete the following steps to set up the eligible aid applicants data for independent students.

Step 1 - Access the Eligible Aid Applicants - Ind (EAAI) form.

Step 2 - In each income range, enter the lower limit of the income range under the From column.

Step 3 - When you are finished, save your work.

Setting Up Program Summary Data for Dependent Students

Complete the following steps to set up the program summary data for dependent students.

Step 1 - Access the Program Summary - Dep (ADPS) form.

Step 2 - In each income range, enter the lower limit of the income range under the From column.

Step 3 - When you are finished, save your work.

South Dakota Colleague System Procedures

Setting Up Program Summary Data for Independent Students

Complete the following steps to set up the program summary data for independent students.

Step 1 - Access the Program Summary - Ind (ADPI) form.

Step 2 - In each income range, enter the lower limit of the income range under the From column.

Step 3 - When you are finished, save your work.

South Dakota Colleague System Procedures

Producing the FISAP Eligible Aid Applicants Report

Responsibility: **Each institution (Director of Financial Aid or designee) must process the data for the FISAP by the September deadline each year.**

NOTE; Only one institution can be running the FISAP at a time. The EAAP data will be unique for each institution based on the data they entered on FFAP. Institutions will need to schedule their time (usually several days with the other institutions).

Timeframe: **August 1 to the last Friday in September -- FISAP must be electronically transmitted by the last Friday in September each year.**

Use the following steps to view/print the FISAP Eligible Aid Applicants Report.

Step 1 - Access the FISAP Eligible Aid Applicants (EAAP) form.

Step 2 - At the Academic Year Lookup, enter the academic year of the data to be included on the report.

Step 3 - At the Detail Report field, enter **Y** to include student detail; otherwise, enter **N**.

Step 4 - At the Saved List Name field, enter a saved list name to be used by this report.

Step 5 - At the Additional Selection Criteria field, enter **Y** to specify additional selection criteria.

Step 6 - Save to run the report.

South Dakota Colleague System Procedures

Producing the FISAP Program Recipients Report

Responsibility: **Each institution (Director of Financial Aid or designee) must process the data for the FISAP by the September deadline every year.**

NOTE; Only one institution can be running the FISAP at a time. The PRDR data will be unique for each institution based on the data they entered on the FFAP. Institutions will need to schedule their time (usually several days) with the other institutions.

NOTE; When the institution currently running their FISAP is satisfied with their results, they need to save the EAAP and PRDR data to the HOLD que and notify the other schools that they have completed their FISAP. Be sure that the word KEEP is in the name of your EAAP and PRDR jobs so that they are not automatically deleted from the hold que.

Timeframe: **August 1 to last Friday in September -- FISAP must be electronically transmitted by the last Friday in September each year.**

Use the following steps to view/print the FISAP Program Recipients Report.

Step 1 - Access the FISAP Program Recipients (PRDR) form.

Step 2 - At the Academic Year Lookup, enter the academic year of the data to be included on the report.

Step 3 - At the Detail Report field, enter **Y** to include student detail; otherwise, enter **N**.

Step 4 - At the Saved List Name field, enter a saved list name to be used by this report.

Step 5 - At the Additional Selection Criteria field, enter **Y** to specify additional selection criteria.

Step 6 - Save to run the report.

South Dakota Colleague System Procedures

Producing the Payroll Notification Report

Responsibility:

Timeframe:

Step 1 - Access the Payroll Notification (FAPN) form. The Payroll Notification (FAPN) form is displayed with the cursor at the Academic Year LookUp prompt.

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

- The cursor moves to the Saved List Name field.

Step 3 - If you want to report on a saved list of applicants from the TC.ACYR file, enter the name of the list in the Saved List Name field. If you want to process all records in the TC.ACYR file, leave the Saved List Name field blank.

- You can use a saved list of IDs from the TC.ACYR file to select the students for the payroll notification report, or you can use a saved list as a basis for selecting the students and then narrow the selection using the additional selection criteria.

Step 4 - If you want to enter additional selection criteria to further narrow the list of records the FAPN report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 5.

Step 5 - Save your work on this form.

South Dakota Colleague System Procedures

Producing the Awards Register

Responsibility:

Timeframe:

Step 1 - Access the Awards Register (AWDR) form.

- The Awards Register (AWDR) form is displayed with the cursor at the Academic Year LookUp prompt.

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

- The cursor moves to the Summary Only field.

Step 3 - If you want to produce a summary report, enter **Y** in the Summary Only field.

Summary figures are provided for each general ledger control account and each award. The total amount awarded for the year, total amount accepted for the year, total number of awards, and the award period totals for awarded and accepted amounts will print for each category. If you want to produce a detail report, enter **N** in the Summary Only field. The detail portion of the register is sorted by name and lists all awards for each applicant. The detail includes the applicant's ID number and name, SSN, Total AR balance, award code and description, total award amount, the award period distribution amounts, and the action status for each award period. Subtotals are provided for the total awarded amount and total accepted amount for each applicant.

Step 4 - If you want to report on a saved list of applicants from the SA.ACYS file, enter the name of the list in the Saved List field.

ALERT! If you enter N in the Summary only field and leave the awards field blank, the AWDR form produces a detailed register for every award at your institution for the year you select. Producing the report in this manner may require excessive processing time and paper. If your institution uses a large number of awards, you may wish to run the detail report for smaller groups of awards using a saved list and/or additional selection criteria.

When you enter a saved list name, Colleague selects all applicants in that saved list and, if you do not choose any other selection criteria, includes all awards for each of those applicants in the report. If you enter a saved list name and you use the Awards field or any additional selection criteria to select applicants, Colleague processes all applicants in the saved list who have been awarded the awards you entered in the Awards field and who also meet any other selection criteria you choose. If you do not want to report on applicants, go to the Awards field.

Step 5 - If you want to produce an awards register for all awards, leave the Awards field blank. If you want to produce an awards register that includes specific awards, enter the award codes in the Awards field, or use LookUp to find the award codes you need.

Step 6 - If you want to enter additional selection criteria to further narrow the list of records the AWDR report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 7.

Step 7 - Save your work on this form.

South Dakota Colleague System Procedures

Technical Tip: If you enter π in the Summary Only field and leave this field blank, the AWDR report will produce a detailed register for every award at your institution for the year you select.

South Dakota Colleague System Procedures

Producing the Award Analysis Report

Responsibility:

Timeframe:

Step 1 - Access the Award Analysis (FCAR) form.

- The Award Analysis (FCAR) form is displayed with the cursor at the Academic Year LookUp prompt.

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

- The cursor moves to the Award Periods field.

Step 3 - Enter an award period or use LookUp to select an award period.

Step 4 - If you want to report on a saved list of applicants from the TC.ACYR file, enter the name of the list in the Saved List field. When you enter a saved list name, Colleague selects all applicants in that saved list and, if you do not choose any other selection criteria, includes all awards for each of those applicants in the report.

If you enter a saved list name and you use the Awards field or any additional selection criteria to select applicants, Colleague processes all applicants in the saved list who have been awarded the awards you entered in the Awards field and who also meet any other selection criteria you choose. If you do not want to use a saved list of award applicants for analysis, go to the Awards field.

Step 5 - If you want to produce an award analysis report for all awards at your institution, leave the Awards field blank. If you want to produce an award analysis report for specific awards, enter the award codes in the Awards field, or use LookUp to find the award codes you need.

Step 6 - If you want to limit the analysis to only certain action statuses, enter the IDs of the action status codes you want. If you don't know the code, use LookUp to find the record you need. If you want to produce an analysis covering all action statuses, leave this field blank. Action statuses are defined by your institution and include statuses such as estimated, pending, accepted, rejected, or denied.

Step 7 - If you want to enter additional selection criteria to further narrow the list of records the FCAR report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 8.

Step 8 - Save your work on this form.

South Dakota Colleague System Procedures

Producing the Overaward Report

Responsibility:

Timeframe:

Step 1 - Access the Overaward (OAWR) form.

- The Overaward (OAWR) form is displayed with the cursor at the Academic Year LookUp prompt.

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

- The cursor moves to the Overawarded Need field.

Step 3 - If you want to produce the report for applicants with overawarded campus based or institutional need amounts, enter **Y** in the Overawarded Need field. If you do not want the report to include applicants with overawarded campusbased or institutional need, leave the Overawarded Need field blank.

Step 4 - If you want to produce the report for applicants with overawarded campus based or institutional cost amounts, enter **Y** in the Overawarded Cost field. If you do not want the report to include applicants with overawarded campus based or institutional cost, leave the Overawarded Cost field blank.

Step 5 - If you want to report on a saved list of applicants from the SA.ACYS file, enter the name of the list in the Saved List field. If you do not want to use a saved list of award applicants for analysis, go to the Students group.

Note: Student award summary records are stored in the Summary Award (SA.ACYS) file by student ID (SA.STUDENT.ID). Your saved list must contain a list of IDs from the SA.ACYS file. Colleague compares the IDs in your saved list to the record IDs in the SA.ACYS file and restricts your selection to the records that match.

Technical Tip: If you enter a saved list name in this field and student IDs in the Students group, Colleague uses the saved list as a basis for selecting records from the Summary Award (SA.ACYS) file and then narrows the selection using the data in the Students group.

Step 6 - If you want to report on overawards for all applicants in the SA.ACYS file for the year you have selected, leave the Student's group blank and ensure that the Saved List Name field is also blank. If you want to produce an award analysis report for specific students, enter the applicant IDs in the Student's group, or use LookUp to find the applicants you need.

Step 7 - If you want to enter additional selection criteria to further narrow the list of records the OAWR report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 8.

Step 8 - Save your work on this form.

Technical Tip: If you enter applicant IDs in the Students Group and you have entered a saved list in the Saved List Name field, only those applicants whose IDs are both contained in the saved list and are entered in the Students group are processed.

South Dakota Colleague System Procedures

Reporting on Ineligible Applicants

Responsibility:

Timeframe:

Step 1 - Access the Award Eligibility Verif (AEV) form.

- The Award Eligibility Verif (AEV) form is displayed with the cursor at the Academic Year LookUp prompt.

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

- The cursor moves to the Award Period field.

Step 3 - If you want to produce the report for specific award periods in the selected academic year, enter the award period code in the Award Period field or use LookUp to find the code you need. If you want to produce the report for all award periods in the selected academic year, leave blank the Award Period field.

Step 4 - If you want to use a saved list of IDs from TA.ACYS file to select records to process, enter the name of the list in the Saved List Name field. If you do not want to use a saved list, leave the Saved List field blank. You can use a saved list of IDs from the TA.ACYS file to select the awards to verify, or you can use a saved list as a basis for selecting the awards and then narrow the selection using additional selection criteria (Step 7).

Step 5 - If you want to produce the AEV report for all awards at your institution, leave the Awards field blank. If you want to produce the AEV report for specific awards, enter the award codes in the Awards field, or use LookUp to find the award codes you need.

Note: Ineligible status for an applicant, as identified by this report, prevents the applicant's funds from transmitting to Accounts Receivable (AR). To enable transmittal of the applicant's funds (and clear the applicant from this report), enter eligibility overrides for the applicant on the Student Eligibility Criteria (SEC) form.

Step 6 - If you want to produce the AEV report for all applicants for the year you have selected, leave the FA Applicants group blank. If you want to produce the AEV report for specific applicants, enter the applicant IDs in the FA Applicants group, or use LookUp to find the applicants you need.

Step 7 - If you want to enter additional selection criteria to further narrow the list of records the AEV report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 8.

Step 8 - Save your work on this form.

South Dakota Colleague System Procedures

Generating FA Mailing Labels

Responsibility:

Timeframe:

Step 1 - Access the FA Labels (FAFL) form.

- The FA Labels (FAFL) form is displayed with the cursor at the Form Name field.

Step 2 - If you want to a custom label format, enter the ID of your custom form at the Forms LookUp prompt. If you want to accept the default format, FA.LABELS, go to Step 3.

Step 3 - Enter in the Postal Sort Class field a code to specify the postal presort class for this mailing. Postal presort classes are defined on the Postal Presort Defaults (PPD) form. The codes are stored in the POSTAL.SORT.TYPES validation code table.

Step 4 - Enter in the Activity to Update field an Activity Code (from the Activities and Events [AE] module) to update for this mailing with the name of the label form used, today's date, and the number of labels created.

Step 5 - If you want to update the mailing history (MAILING file) for each person for whom a label is created, enter **Y** in the Update Mailing History field. If you do not want to update mailing history, go to Step 6.

Step 6 - If you want to use name and address mailing criteria, detail on the Name/ Address Selection field. When you detail on this field, the Name/Address Selection Parameters (NASP) form is displayed. You can use the NASP form to enter name/address hierarchy codes, mail types, and mail rules. When the detail form has information on it, an **X** appears in this field. If you do not want to use name and address mailing criteria, go to Step 7.

Note: The standard format, defined as FA.LABELS, can be modified to suit your requirements. You can modify label formats using the Forms Processing (FO) forms in the CORE application.

Step 7 - If you want to use a saved list of student IDs from the FIN.AID file to specify the records to include in this label print run, enter the list name in the Saved List Name field. You can use the saved list of IDs from the FIN.AID file to select the labels you want to print, or you can use a saved list as a basis for selecting the labels and then narrow the selection using any additional selection criteria. If you enter a saved list name, Colleague selects all labels in that saved list and, if you do not choose any other selection criteria, prints a label for each record. If you enter a saved list name and you use any additional selection criteria to select labels, Colleague includes in the print run all labels in the saved list that also meet the other selection criteria you choose. If you do not want to use a saved list to select records for this print run, go to Step 8.

Step 8 - If you want to print labels for students in a range of Zip/postal codes, enter the beginning and ending Zip/postal codes in the Zip Code Begin/End group. If you do not want to print labels based on a range of Zip/postal codes, leave the Zip Codes group blank.

Step 9 - Enter the FA year or years from which you want to select records.

South Dakota Colleague System Procedures

Step 10 - If you want to print labels for students in only one or two Zip/postal codes, enter the codes in the Zip Codes field. The Zip/postal code(s) you enter in this field serve as selection criteria for this print run. When you enter a Zip/postal code here, Colleague prints labels only for FA applicants within the Zip/postal code. If you do not want to restrict this label run to one or two Zip/postal codes, leave the Zip Codes field blank.

Note: To print labels for only one or two Zip/postal codes, go to Step 10.

Note: Use this field to specify single Zip codes. To process labels for a range of Zip codes, use the Zip Code Begin and End fields on this form.

Step 11 - If you want to enter additional selection criteria to further narrow the list of records included in this label run, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 12.

Step 12 - Save your work on this form.

South Dakota Colleague System Procedures

Reporting on Financial Aid and Registration Discrepancies

Responsibility:

Timeframe:

Step 1 - Access the Attendance Pattern Mismatch (APCR) form.

- The Attendance Pattern Mismatch (APCR) form is displayed with the cursor at the Academic Year LookUp prompt.

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

- The cursor moves to the Award Periods field.

Step 3 - Enter an award period or use LookUp to find the award period you need.

Step 4 - If you want the report to compare the student's FA enrollment status for this award period with the student's registration credits, enter **Y** in the Enrollment field. If you do not want to compare enrollment status, leave the Enrollment field blank.

Step 5 - If you want to compare the student's FA credits for this award period with the student's registration credits, enter **Y** in the Credits field.

Technical Tip: FA enrollment statuses are defined as full/part time codes on the Full/Part Time Definition (FPD) form. (For example, a status of F, for "Full," could be assigned to 12.00 or more credits.) You then can associate the appropriate full/part time code with each of your standard attendance patterns in the Enroll Status field in the Award Period group on the Attendance Pattern Definition [ATPC] form. The default enrollment status from the standard attendance pattern can be overridden for an individual student on the SATP form. The student's registration credits are determined by the subroutine, S.FA.REG.CREDITS. It looks to the STTR.STUDENT.LOAD data element of the student's STUDENT.TERMS record to get the number of credits. The Award Detail Entry (AIDE) form uses this same subroutine for displaying the Reg Credits.

If you do not want to compare the student's FA and registration credits, leave the Credits field blank.

Step 6 - If you want to compare the student's FA residency with the residency status recorded in the Registration module, enter **Y** in the Residency field. If you do not want to compare residency statuses, leave the Residency field blank.

Step 7 - If you want to compare the student's FA location from the student attendance pattern with the Registration module's location information found in the STUDENTS file, enter **Y** in the Location field. If you do not want to compare Location information, leave the Location field blank.

Technical Tip: The FA credits information is built from the value in the SA.ATP.DEF.CREDITS field in the SA.ACYR file (as specified in the FA Cr[edits] field in the Award Period group on the Student Attendance Pattern [SATP] form). This same information is also displayed on the Award Detail Entry [AIDE] form. The Reg Credits listing on the report uses the subroutine S.FA.REG.CREDITS to determine what to display. It looks to the STC.CRED data element of the student's STUDENT.ACAD.CRED record to get the number of credits. The Award Detail Entry (AIDE) form uses this same subroutine for displaying the Reg Credits.

South Dakota Colleague System Procedures

Technical Tip: The FA residency status is built from the value in the SA.TERM.RES data element in the SA.ACYR file (as specified for the individual student in the FA Res[idency] field in the Award Period group on the Student Attendance Pattern [SATP] form). The Reg Res[idency] value comes from the STU.RESIDENCY.STATUS data element of the student's STUDENTS record (as specified in the Residency Status/Date field on the Addl Student Profile Info [ASPR] form in the Academic Records [AC]).

Technical Tip: The FA location is the value in the Award Period FA Loc field on the Student Attendance Pattern (SATP) form. To determine the REG location for the REG column, this report calls S.GET.STU.HOME.LOCATION. The S.GET.STU.HOME.LOCATION subroutine looks to the STUDENTS file and returns a STU.HOME.LOCATION value that falls within the award period's start and end date range. If the FA location value does not match the REG location value, the student is included on the report.

Step 8 - If you want to compare the FA office based on the student's FA location with the FA office associated to the student's REG location, enter **Y** in the Office field. Both these office values are displayed on the Student Attendance Pattern (SATP) form. If you do not want to compare office information, leave the Office field blank.

Step 9 - For Release 17.0 only, you can use the Min Credits and Max Credits fields to limit the report to students who fall within a given minimum and maximum range of credits. Students who fall outside this range will not be included on the report.

Step 10 - If you want to report on a saved list of applicants from the TA.ACYR file, enter the name of the list in the Saved List Name field. When you enter a saved list name, Colleague selects all applicants in that saved list and, if you do not choose any other selection criteria, includes all awards for each of those applicants in the report. If you do not want to use a saved list of applicants, leave the Saved List Name field blank.

Technical Tip: To determine the FA office, this report must first determine the student's FA location via the Award Period FA Loc field on the Student Attendance Pattern (SATP) form. The S.FA.GET.OFFICE subroutine is called to determine the FA office using the calculated FA location. S.FA.GET.OFFICE reads the FA.LOCATIONS file and examines the FALOC.FA.OFFICE field. If this field is blank, the subroutine extracts the FA office from the FSP.MAIN.FA.OFFICE field in the FA.SYS.PARAMS record in ST.PARAMS (entered in the FA Office ID field on the FA Institutional Defaults (FIDF) form).

To determine the REG office, APCR must first determine the student's REG location. It calls the S.GET.STU.HOME.LOCATION subroutine to return a reg location. It then calls the S.FA.GET.OFFICE subroutine to determine the FA office associated with the REG location. S.FA.GET.OFFICE examines both the FALOC.FA.OFFICE field and FSP.MAIN.FA.OFFICE fields to determine the FA office associated to the REG location.

Step 11 - If you want to enter additional selection criteria to further narrow the list of records the APCR report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 12.

Step 12 - Save your work on this form.

South Dakota Colleague System Procedures

Producing the Fund Management Report

Responsibility:

Timeframe:

Step 1 - Access the Fund Management (FMGT) form.

- The Fund Management (FMGT) form is displayed with the cursor at the Academic Year LookUp prompt.

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

- The cursor moves to the Summary Only field.

Step 3 - If you want to produce a summary report, enter **Y** in the Summary Only field.

Producing the report in summary mode omits student detail from the report. If you want the report to include student detail, enter **N** or leave the field blank.

Step 4 - If you want to include location detail in the report, enter **Y** in the Include by Location field. If you do not want to include location detail in the report, leave the Include by Location field blank.

Step 5 - If you want to report on a saved list of applicants from the TA.ACYSR file, enter the name of the list in the Saved List Name field.

Technical Tip: If you elect to include FA location detail, students with award period awards for more than one location with the same office are counted twice on the fund management report.

If you do not want to use a saved list of applicants, leave the Saved List Name field blank.

Step 6 - If you want to use individual student IDs to select students for the FMGT report, enter in the Students group the student's ID or name. Colleague uses the student IDs entered in Students group to select award period awards for the report. Award period awards are stored in the Term Award (TA.ACYSR) file by student ID, award ID, and award period (TA.STUDENT.ID*TA.AW.ID*TA.TERM.ID). Colleague compares the student ID in this field to the student ID (TA.STUDENT.ID) in the Term Award (TA.ACYSR) file and restricts your selection to the records that match. If you do not want to use Student records to select students for the report, leave the Students group blank.

Step 7 - If you want to select specific awards for the report, enter an award ID in the Awards group. Colleague uses the award code entered in this field to select award period awards for the fund management report. Award period awards are stored in the Term Award (TA.ACYSR) file by student ID, award ID, and award period (TA.STUDENT.ID*TA.AW.ID*TA.TERM.ID). Colleague compares the award ID in this field to the award ID (TA.AW.ID) in the Term Award (TA.ACYSR) file and restricts your selection to the records that match. If you do not want to select specific awards for the report, leave the Awards field blank.

Technical Tip: Award period awards are stored in the Term Award (TA.ACYSR) file by student ID, award ID, and award period (TA.STUDENT.ID*TA.AW.ID*TA.TERM.ID). Your saved list must contain a list of IDs from the TA.ACYSR file. Colleague compares the IDs in your saved list to the record IDs in the TA.ACYSR file and restricts your selection to the records that match. If you enter a saved list name in this field, and student IDs in the Students group or award IDs in the Awards group, Colleague uses the saved list as a basis for selecting records from the Term Award

South Dakota Colleague System Procedures

(TA.ACYR) file and then narrows the selection using the data in the Students group and the Awards group. When you enter a saved list name, Colleague selects all applicants in that saved list and, if you do not choose any other selection criteria, includes all awards for each of those applicants in the report.

Step 8 - If you want to enter additional selection criteria to further narrow the list of records the FMGT report processes, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. If you do not want to enter additional selection criteria, go to Step 9.

Step 9 - Save your work on this form.

South Dakota Colleague System Procedures

Setting Up the ALPA Form

Responsibility:

Timeframe:

Follow the steps below to set up parameters on the ALPA form.

Step 1 - Access the ALPA form.

- The ALPA form displays with the cursor in the Award Letter Parameters Lookup. Enter **DEFAULT** to access the default parameter format.

Step 2 - In the Description field, enter the description of this award letter format.

- Enter a description that will help identify this format from the other ones in this file.

Step 3 - In the Office Block field, enter **Yes** to print the FA office name, address, and phone. Enter **No** to leave this part of the award letter blank. This option is normally used if printing on letterhead paper. This field indicates if the award letter will print the office information. The office information is obtained by finding the student's location, then finding the location's office. If the office's name, address, or city/state/Zip is blank on FAOP, then the institution's name, address, and city/state/Zip is used from FIDF.

Step 4 - In the SSN Options field, enter one of the following display options for student's Social Security Number:

- S – Show SSN.** Show the student's full SSN on the award letter.
- L – Last 4 Digits.** Show only the last four digits of the student's SSN on the award letter.
- N – No SSN.** Don't show the SSN on the student's award letter.

This option allows you to choose how the student's SSN is displayed on the award letter.

Step 5 - In the Need Block field, enter **Yes** to print a student's need information such as cost of attendance, EFC, and other need information on the award letter. Enter **No** to leave this area blank on the award letter.

Step 6 - In the Intro text field, enter the introductory text for the award letter. This is the text to be printed on the award letter after the "Dear Student" and before the award detail information.

Step 7 - In the Closing Text field, enter the text to be used for the closing of the award letter. This is the text used to close the award letter. This text will follow the award amounts section of the letter. If you want to use a closing such as "Sincerely," then you must include that in the closing.

Step 8 - In the Group1 Title field, enter the title for the first group of awards. You can have three groups of awards on the award letter. This is the title to precede the Group1 awards. If you leave this field blank, then a blank line will appear on the letter. The awards displayed under this title are those specified in the Group1 Categories field.

Step 9 - At the Award Category Lookup (for the Group1 Categories field), enter the awards to be displayed under the title specified in the Group1 Title field.

South Dakota Colleague System Procedures

Step 10 - In the Group2 Title field, enter the title for the second group of awards. This is the title for Group2 awards. The awards displayed under this title are those specified in the Group2 Categories field.

Step 11 - At the Award Category Lookup (for the Group2 Categories field), enter the awards to be displayed under the title specified in the Group2 Title field.

Step 12 - In the Group3 Title field, enter the title for the group of awards. This is the title for Group3 awards. Any award not in Group1 or Group2 is included in Group3.

Step 13 - In the Column1 Title field, enter the title for the first column. This column contains award period amounts for those award periods entered in the Column1 Award Periods field.

Step 14 - At the Column1 Award Period Lookup, enter the award periods to be displayed under the title specified in the Column1 Title field.

Step 15 - In the Column2 Title field, enter the title for the second column. This column contains award period amounts for those award periods entered in the Column2 Award Periods field.

Step 16 - At the Column2 Award Period Lookup, enter the award periods to be displayed under the title specified in the Column2 Title field.

Step 17 - In the Column3 Title field, enter the title for the third column. This column contains award period amounts for those award periods entered in the Column3 Award Periods field.

Step 18 - At the Column3 Award Period Lookup, enter the award periods to be displayed under the title specified in the Column3 Title field.

Step 19 - In the Column4 Title field, enter the title for the fourth column. This column contains award period amounts for those award periods entered in the Column4 Award Periods field.

Step 20 - At the Column4 Award Period Lookup, enter the award periods to be displayed under the title specified in the Column4 Title field.

Step 21 - At the Award Name Title field, enter the title for the column that contains the award names.

Step 22 - At the Award Total Title field, enter the title for the award total column. This column contains the annual award amounts.

Step 23 - In the Approval Column field, enter **Yes** if you want the award letter to contain an approval column. The Approval Column contains a _Y_N for each award so that the student can indicate a decision for each award.

Step 24 - Save your work on this form.

- Repeat Step 2 to Step 24 to create additional award letter formats.

South Dakota Colleague System Procedures

Setting Up the ALRT Form

Responsibility:

Timeframe:

Follow the steps below to set up rules on the ALRT form.

Step 1 - Access the ALRT form.

- The ALRT form displays with the cursor in the Academic Year Lookup. Enter the academic year to be used for this rule.

Step 2 - At the Rule Table Lookup, enter the award letter rule table ID.

Step 3 - In the Description field, enter a brief description of this rule table ID. This description displays with the rule table ID. Use the description to describe the purpose and intended use of this rule table so that you can easily distinguish this rule table ID from others.

Note: If you are using the subroutine S.PRINT.ALTR, enter ALTR. This is the rule table ID used by the subroutine S.PRINT.ALTR. You will see a message that the record is not found. Enter Add.

Step 4 - In the Comments field, enter comments about the rule table. The comments more fully describe the purpose and intended use of the rule table. Colleague provides an unlimited number of lines for your comments. You can detail to a full comments form.

Step 5 - At the Award Letter Parameter Lookup, enter the default award letter parameter that will be used if the student fails the rules you enter in the Rule field or a subroutine entered in the Award Letter Parameter Subroutine field. This field is required; you must enter an award letter parameter to serve as the default award letter parameter for your institution. If you do not know the ID, use LookUp to help you find the record you need. If you are using this field alone (not in conjunction with rules or a subroutine), the code you enter in this field is defaulted for all students when this rule table ID is used.

Step 6 - If you are entering a custom subroutine for determining which award letter parameters to use for the student, go to Step 10 - Otherwise, continue with Step 7.

Step 7 - At the Rule Lookup, enter the rule to be evaluated, or use LookUp to find the rule ID you need.

Step 8 - At the Award Letter Parameter Lookup, enter the award letter parameter to be used if the rule entered in Step 7 is passed.

Step 9 - Repeat Step 7 and Step 8 until all the rules are entered with their appropriate award letter parameters. Continue with Step 11.

Step 10 - In the Award Letter Parameter Subroutine field, enter the name of the custom subroutine created by your institution to be used to determine the award letter parameter to be used.

Step 11 - Save your work on this form.

South Dakota Colleague System Procedures

Associating the S.PRINT.ALTR Subroutine with the Award Letter ID of ALTR2

Responsibility:

Timeframe:

You must use the FA Award Letter Definition (FALD) form to associate the S.PRINT.ALTR subroutine to the award letter ID of ALTR2. This award letter ID tells Colleague to use the S.PRINT.ALTR subroutine when printing award letters on the Award Letters (ALTR) form.

Setting Up the FALD Form

Follow the steps below to associate the S.PRINT.ALTR subroutine with the award letter ID of ALTR2.

Step 1 - Access the FA Award Letter Definition (FALD) form

Step 2 - The FA Award Letter Definition (FALD) form is displayed with the cursor at the Enter Award Letter ID prompt.

Step 3 - Enter ALTR2. The award letter ID is then displayed in the upper left corner of the form and the Short Description and the Subroutine Name are automatically entered.

Step 4 - Save your work on the FALD form.

Step 5 - Continue with "Procedure for Printing Award Letters".

Note: The Subroutine Name indicated here is used to print award letters when you specify the award letter ID (ALTR2) in the Custom Award Letter field on the ALTR form.

South Dakota Colleague System Procedures

Using a Custom Award Letter

Responsibility:

Timeframe:

Follow the steps below to use a custom award letter with the ALTR form.

Step 1 - Work with your system administrator to customize the S.PRINT.ALTR or the S.PRINT.AWARD.LETTERS subroutine delivered with Colleague.

Step 2 - Associate the custom subroutine with an award letter ID on the FA Award Letter Definition (FALD) form.

Step 3 - Access the FA Award Letter Definition (FALD) form.

Step 4 - The FA Award Letter Definition (FALD) form is displayed with the cursor at the Enter Award Letter ID prompt.

Step 5 - Enter an award letter ID of up to 20 characters (for example, UG . LETTER). You have the option to use LookUp to access an award letter ID that already exists.

Step 6 - At the prompt “Record not found--Reenter or Add,” add the record. The award letter ID you entered is displayed in the upper left corner of the form.

Step 7 - Enter a short description of the award letter ID. Colleague provides 25 characters for entering a short description of the award letter. On the Award Letters (ALTR) form, which is used to print an award letter, you can use LookUp to select an award letter ID. Colleague displays the ID and the short description that you enter here on the ALTR form. For example, “undergraduate letter.”

Step 8 - Enter the name of the customized award letter print subroutine you want to associate with this award letter print ID. The customized award letter subroutine you enter here is used to print award letters when you specify the award letter ID from Step 5 of this procedure in the Custom Award Letter field on the ALTR form.

Step 9 - Save your work on the FALD form.

Step 10 - Continue with “Procedure for Printing Award Letters”, entering the award letter ID you created in Step 5 in the Custom Award Letter field.

South Dakota Colleague System Procedures

Printing Award Letters

Responsibility:

Timeframe:

Step 1 - Access the Award Letters (ALTR) form.

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

Step 3 - For Release 17.0 only, in the Award Letters to Print field, enter one of the following, then continue with Step 6:

A to print all award letters

M to print award letters for applicants for whom an award letter has been modified since it was last printed

N to print award letters for applicants for whom an award letter has not previously been printed

Note: For Release 17.0, the fields Not Previously Printed and Modified Since Printed do not display. Instead a single field, Award Letters to Print, replaces them.

Step 4 - For Release 16.0 only, if you want to print award letters for applicants for whom an award letter has not been previously printed, enter **Y** in the Not Previously Printed field. If you do not want to restrict your selection to those letters that have not previously been printed, enter **N** in the Not Previously Printed field. To print award letters for applicants for whom an award letter has been modified since it was last printed, use the Modified Since Printed field. However, if you enter “Y” in the Not Previously Printed field, you will not be able to enter “Y” in the Modified Since Printed field.

Step 5 - For Release 16.0 only, if you want to print award letters for applicants for whom an award letter has been modified since it was last printed, enter **Y** in the Modified Since Printed field. If you do not want to restrict your selection to only those letters that have been modified since their last printing, enter **N** in the Modified Since Printed field. To print award letters for applicants for whom an award letter has not been previously printed, use the Not Previously Printed field. However, if you enter “Y” in the Modified Since Printed field, you will not be able to enter “Y” in the Not Previously Printed field.

Step 6 - If you want the award letter to specify a date by which the applicant must return the award letter, enter the date in the Return Letter By field. If you do not want to include a Return By date in the letter, leave the Return Letter By field blank.

Note: If you want to print both award letters that have not been previously printed and award letters that have been modified since they were last printed, you should enter **N** in the Not Previously Printed field and **N** in the Modified Since Printed field. You can then use a saved list or additional selection criteria to identify the subset of desired applicants.

Note: If you want to print both award letters that have not been previously printed and award letters that have been modified since they were last printed, you should enter **N** in the Not Previously Printed field and **N** in the Modified Since Printed field. You can then use a saved list or additional selection criteria to identify the subset of desired applicants.

Note: If you want this information to print on an award letter, you must customize a subroutine to do this.

South Dakota Colleague System Procedures

Step 7 - If you want Colleague to update Communications Management (CC) for each applicant for whom you print an award letter, enter the code you want to use in the Comm Code/Status field. If you do not want Colleague to update CC for each applicant for whom you print an award letter, leave the Comm Code/Status field blank. For each applicant, this code will record that an award letter was printed or trigger additional events in the CM module. Communication codes are defined in the Core application and stored in the Communication Codes file (CC.CODES).

Step 8 - Enter in the Name/Address Hierarchy field a code that specifies which name and address information should be used to generate the applicant address on the award letters or use LookUp to find the code you need.

Step 9 - If you want to print a custom award letter from a subroutine created by your institution, enter the letter's ID in the Custom Award Letter field. See "Using Custom Award Letters". If you want to use the default award letter print subroutine provided by Colleague, S.PRINT.AWARD.LETTERS, leave this field blank.

Note: The Name/Address Hierarchy is defined in CORE on the Name and Address Hierarchy (NAHM) form.

Note: The default award letter print subroutine provides name, address, and award information. Your system administrator can help you modify the subroutine to insert the text you require. The S.PRINT.AWARD.LETTERS subroutine is designed to print on preprinted forms.

If you want to use the S.PRINT.ALTR subroutine provided by Colleague, enter ALTR2 at this prompt.

Step 10 - If you want to include in the letter awards with an action category of Estimated, enter **Y** in the Include Estimated field. If an award period is found with a status of Estimated, the entire award is printed. If you do not want to include estimated awards in the letter, enter **N** in the Include Estimated field.

Step 11 - If you want to include in the letter awards with an action category of Pending, enter **Y** in the Include Pending field. If you do not want to include pending awards, enter **N** in the Include Pending field.

Step 12 - If you want to include in the letter awards with an action category of Accepted, enter **Y** in the Include Accepted field. If you do not want to include accepted awards, enter **N** in the Include Accepted field.

Step 13 - If you want to include in the letter awards with an action category of Rejected, enter **Y** in the Include Rejected field. If you do not want to include rejected awards, enter **N** in the Include Rejected field.

Step 14 - If you want to include in the letter awards with an action category of Denied, enter **Y** in the Include Denied field.

Note: If you are using the S.PRINT.ALTR subroutine, you must first set up the Award Letter Parameters (ALPA) form. If you create more than one award letter format on the ALPA form, you

South Dakota Colleague System Procedures

must also set up the Award Letter Rule Table (ALRT) form to enter rules that determine when each letter format is to be used. Next, you must use the FA Award Letter Definition (FALD) form to associate the S.PRINT.ALTR subroutine to the award letter ID of ALTR2. See "Using the S.PRINT.ALTR Subroutine".

If you do not want to include denied awards, enter **N** in the Include Denied field.

Step 15 - If you want to use a saved list of student IDs (SA.STUDENT.ID) from the Summary Award (SA.ACYR) file to select award letters to print, enter the list name in the Saved List Name field. If you do not want to use a saved list to select records, leave the Saved List Name field blank. Colleague uses the saved list you enter in this field to select the applicants for whom to print award letters. Colleague compares the IDs in the saved list to the record ID (SA.STUDENT.ID) in the Summary Award file (SA.ACYR) and restricts your selection to the records that match. You will have an opportunity to further narrow your selection of applicants in Step 18.

Step 16 - If you want to print award letters for students with a specific awards, enter the award code in the Awards group. If you do not want to print award letters for students with specific awards, leave the Awards field blank. Colleague uses the award code entered in this field to print award letters for students with the award. Colleague compares the award code ID in this field to the award code ID (SA.AWARD) in the Summary Award file (SA.ACYR) and restricts your selection to the records that match. It finds the student who has the award stated in the lookup and prints all awards the student has in addition to the stated award. You will have an opportunity to further narrow your selection of applicants in Step 18

Note: To select records by individual ID, do not enter the name of a saved list here; instead, enter the IDs individually in the FA Applicants group.

Technical Tip: If you enter both a saved list name in this field and a list of applicants in the FA Applicants group, Colleague selects records only for those applicants who are on both lists. Colleague ignores applicants listed in the FA Applicants group who are not on the saved list.

Note: If you leave the Saved List Name field, Awards group, and FA Applicants group blank, and if you do not construct any additional selection criteria, Colleague selects all records in the Summary Award file for printing award letters.

Step 17 - If you want to print award letters for individual applicants, enter the applicant IDs in the FA Applicants field. If you do not want to print award letters for individual applicants, leave the FA Applicants field blank. Colleague compares the ID in this field to the record ID (SA.STUDENT.ID) in the Summary Award file (SA.ACYR) and restricts your selection to the records that match. If you enter both a saved list name and a list of applicants in the FA Applicants group, Colleague selects records only for those applicants who are on both lists. Colleague ignores applicants listed in the FA Applicants group who are not on the saved list.

Step 18 - If you want to enter additional selection criteria to further narrow the list of award letters to print, enter **Y** in the Additional Selection Criteria field. The Additional Selection Criteria form is displayed, on which you can enter criteria to further narrow your selection. Use selection criteria based on information in the Summary Award (SA.ACYR) file. If you do not want to enter additional selection criteria, go to Step 19.

South Dakota Colleague System Procedures

Step 19 - Save your work on this form.