UNIT4

CAMS® Enterprise

Financial Aid Processes

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Published: 18 May 2016

Abstract

This document discusses how student financial aid is processed in CAMS. Items covered are arranged in logical workflow order, although you may or may not perform certain functions based on the type of aid processed at your institution. Prior to processing aid, ensure that Financial Aid Setup is complete (Please refer to the Financial Aid Setup.pdf document for instructions). Process steps will be covered in detail and include the following topics:

- Importing ISIR Records

- Applying Estimated Cost of Attendance Budgets

- Packaging Student Aid/Awards

- Processing Student Aid/Award Letters

- Managing Federal Direct Loans and Grants (COD Export/Import)

- Funding Student Aid/Awards

- Transferring Student Aid/Awards to Billing

In addition, other functionality will be discussed. This includes the following topics:

- Maintaining/Adjusting Awards

- Importing Awards from EDE and PowerFAIDS

- Work Study Setup and Process

- Financial Aid Reports

- Loan Log/Exit Interview

Please note: In order to remain current with the latest technology, the Financial Aid module has evolved, and some functionality is no longer the most efficient method for managing certain tasks. Documentation for those tasks has been removed from this PDF document. The following topics are available through Online Help only:

- Importing ISIR Records via EDExpress (not available after 2010-2011 Academic Year)

- Applying Budget Rules

- Automating Single Student Packages

- Non-Priority Packaging for Multiple Students

- Applying Documents through Automated Processes

Disclaimer

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Financial Aid Overview

The Financial Aid module is used to package and track student aid so that pending and funded aid factors into the total amount the student owes to the institution. Federal direct loans and grants, state aid, and institutional aid such as scholarships and grants may be part of a student's financial aid package. The most efficient methods for building aid packages include processes such as importing ISIR information, automatically loading document tracking items, mass applying estimated cost of attendance budgets, automating award packaging based on federal, state, and institutional rules, and using COD integration tools if your institution participates in federal financial aid programs.

Once financial aid setup (please refer to Financial Setup.pdf) has been completed for an Academic Year, you can begin processing student financial aid. The workflow outlined below is typical for institutions participating in Federal Financial Aid programs. Some institutions may not require all steps to complete their packaging processes.

Financial Aid Workflow

Figure 1: Financial Aid Workflow

- **Import ISIR Records** – Essential information such as Expected Family Contribution (EFC), Dependent Status, Total Income, and National Student Loan Data System (NSLDS) data is necessary for mass applying budgets, PELL processing, and Priority Packaging

  o During the ISIR import process, document tracking documents can be automatically loaded to student records based on ISIR information (see Document Tracking Auto Load in the Financial Aid Setup document)

- **Apply Estimated Cost of Attendances Budgets (Direct Cost Type)** – Used to calculate Remaining Need and can be applied en masse via Packaging >Prioritized >Budgets, or one at a time in Financial Aid Maintenance

- **Package Awards** – Build student aid packages based on business rules in Packaging >Prioritized >Package or apply awards to individual student records in Packaging >Single

- **Generate Award Letters** – Generated automatically during Packaging >Prioritized >Package, through Report >Award Letters Packaging or Reports >Award letters, or for single students via Financial Maintenance >More >Report

- **Request Aid from Funding Sources** – COD Integration processes for Federal direct loans and grants, or from other sources for non-Federal aid

- **Fund Awards** – When funds become available, update Award Status and Check Signed Date via Automated Processes >Check Release

- **Transfer Funded Awards to Billing** – Use the Transfer window to generate a billing batch where awards become credit to the student account

Additional processes such as award adjustments, tracking documents, importing information from COD, removing No-Show student aid, managing Work Study, running reports, etc. will occur during various points in the workflow process and are covered later in this document.

Maintaining ISIR Information

ISIR (Institutional Student Information Record) records contain information provided by the student in the FAFSA (Free Application for Federal Student Aid), as well as historical data available from NSLDS (National Student Loan Data System).

This information can then be used to apply the financial aid Direct Cost Type (Cost of Attendance Budgets) and to apply award packages. An ISIR record is required for FISAP (Fiscal Operations Report and the Application to Participate) reports used by institutions participating in certain types of federal aid.

Document Tracking documents can be automatically loaded based on ISIR field values during the ISIR import process (see Document Tracking Auto Load in the Financial Aid Setup document). ISIR records may be locked for comparison of subsequent ISIR transactions for the same student. The ISIR can be viewed and printed in full detail.

Typically ISIR records are imported into CAMS in Tools >Import >Financial Aid >ISIR Direct, although if institutions do not participate in federal aid programs may enter some ISIR data such as EFC (Expected Family Contribution) manually. ISIR records must be attached to the Academic and Financial Aid year as appropriate.

The import process generates the student's Financial Aid Maintenance record in Financial Aid >Maintenance, where unlimited inactive ISIR records may be stored. The ISIR import process also populates a Fin Lifetime database table, used during Prioritized Packaging to prevent exceeding a student's lifetime maximum federal award amount.

ISIR Direct Import

Before ISIR records can be imported into CAMS, they must be extracted from EDconnect and saved in a location readable from a shared location on the CAMS SQL Server. The user saving these records must have Modify permissions to the folder. In addition, the CAMS Enterprise >Import >COD folder on the CAMS IIS Server must ensure that IUSR_MachineName has Modify permissions to that folder.

Step-By-Step: Import ISIR Records

1. From the **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >ISIR Direct** to open the **ISIR Direct Import** window. Click **Browse** to open the **Choose File** window.

2. Select the appropriate ISIR file and click **Open**.

Figure 2: ISIR Direct Import

3. You can print a report of all previously imported ISIR file names for any Academic Year by first selecting the **Academic Year**, then click **Previous Imported Files**. A report displays listing all ISIR files imported for the selected Academic Year, listed by Financial Aid Year and ordered by file name. In addition, on the Financial Aid Maintenance ISIR tab highlighting any ISIR record in the grid will display below the grid the ISIR import file where the record originated.

4. A grid displays which allows the user to enter in one or more **FICE Codes**. These codes are then compared to the ISIR record to determine and import the student's housing status. To enter the institution's **FICE Code**(s), right click in this grid and enter the **College Name** and **School ID**. Click the **Add** button to save. Codes may be deleted by left clicking on the record and then clicking **Delete** and can be modified by double-clicking an entry in the grid. College FICE Codes are then retained for all ISIR imports.

Figure 3: FICE Code Entry screen

5. Once any College FICE Code(s) have been identified and entered, select the **EDE Year Indicator** (System field that cannot be altered), **Academic Year**, and **Default Financial Aid Year.** The EDE Year Indicator must match the Academic Year designation on the ISIR import file or no results will populate. This is to prevent the data from being applied to the wrong year.

6. As ISIR records may contain records for students that fall within different Financial Aid Years in an Academic Year, ISIR Batch Job queries can be written in **Financial Aid >Packaging >Prioritized >Package Criteria** to identify students whose ISIR record should be applied to a specific Financial Aid Year within an Academic Year. During the ISIR import, any students ISIR record in the import file that meet the criteria in the query will be attached to that Financial Aid Year. See **Financial Aid Queries** in the Financial Aid Setup document.

7. Upon selecting the Academic Year, any Batch Job queries assigned to that Academic Year will appear in the **Batch Assign Financial Aid Years** grid. Note the following regarding Batch Job queries:

    *   A student ISIR not in any query will be assigned the selected **Default Financial Aid Year**.

    *   A student ISIR in one of the queries only, will be assigned the Financial Aid Year the query is written for.

    *   A student ISIR in multiple queries will be assigned to the first query that is run.

    *   A student ISIR for students not in CAMS will be assigned the selected **Default Financial Aid Year** and placed on the **Holding** tab for import.

8. Click **Parse Document** to begin the import. Any records that include Social Security Number (SSN) that matches an existing record in CAMS will display in the upper grid. Any existing ISIR records that are locked (see Financial Aid >Maintenance >ISIR tab) will display in the lower grid.

9. CAMS compares the social security numbers of the student records being imported to records in the CAMS database. All records may be imported with this process regardless of an SSN match. Those with no match are placed into holding tables. Upon a student being added to CAMS Enterprise with an SSN that matches a record in this table, the ISIR data and any auto-loaded document tracking items will be applied to that student record.
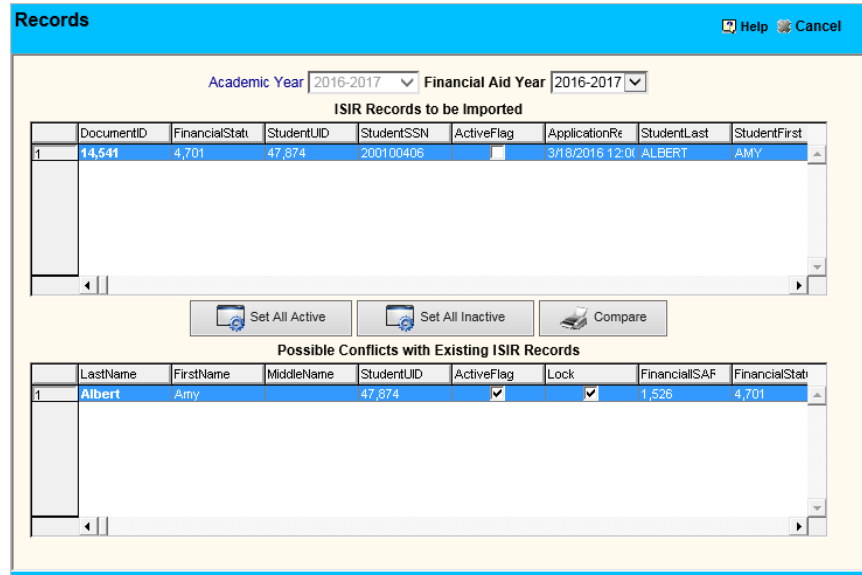

Figure 4: Records tab, once file has been parsed.

10. At this point, reconciliation of any existing records should take place. Records showing only in the top grid alert the user that the ISIR being imported is for an existing student. If an ISIR has already been imported for that student and that ISIR has been marked **Locked**, the record will be displayed in the lower grid as well. Click the **Compare** button to view Locked records to determine which ISIR should be marked Active. A report displays listing the fields, import value, and existing ISIR value for the differing values between the existing ISIR information and the import.

11. For records shown in the bottom grid, once it has been determined which record will be active, that record needs to be marked **Active**. If the existing record is chosen, then the newly imported ISIR record will be marked inactive. Clicking the Active box in the upper grid will result in the new ISIR being marked as active. If the existing record is locked you must uncheck the Locked check box in the lower grid in order to import a new ISIR record.

Note: If both the record in the upper and lower grids have the Active flag checked, the import process will not complete until one or the other is unchecked. Only one ISIR record may be marked as Active per Academic and Financial Aid Year.

12. Choose **Set All Active** to mark all the ISIRs as the active record; choose **Set All Inactive** to uncheck this box. Also, these may be checked on a record by record basis by checking or unchecking the box.

*Note: Selecting **Set All Active** will mark all corresponding locked records in the bottom grid as inactive and unlocked. The imported ISIR record from the top grid will be the active record after the import.*

13. The **Holding** tab displays those records with an SSN that does not match any found in CAMS. These records are imported into a holding table, where they will remain until a student record is added with an SSN that matches. Upon a student being added to CAMS Enterprise with an SSN that matches a record in this table, the ISIR data, custom ISIR data, and any auto-loaded document tracking items will be applied to that student record.

14. From the **Holding** tab, there are several reports which can be printed. These include an Exception Report, a Labels Report, and a customizable Application Letter Report. Choosing the applicable report and clicking **Print** will generate this.

15. Choose **Set All Active** to mark all the ISIRs as the active record for the holding records; choose **Set All Inactive** to uncheck this box. Also, these may be checked on a record by record basis by checking or un-checking the box in the grid.

Figure 5: Holding tab

16. A **Prospect/Student Import Job** may be created to generate a new Prospect or Student record for the unmatched SSNs. After entering a job name for the import, click **Add to Batch** to create the import. A popup stating "Transfer Successful" will display when the file is ready to be imported (*See Tools >Import >Admissions >Prospect/Student Import*). When a student record is added, either by importing Prospects then loading to Student, importing Students, or manually adding a student, records in the ISIR holding table with matching Social Security numbers will be imported to the student's Financial Aid Maintenance record. If a student record already exists but with no SSN or an incorrect SSN, updating the SSN in the student record will import any matching ISIR records from the ISIR holding table.

Note: Be sure to complete the ISIR import process before moving on to the Prospect/Student Generic Import.

17. The Import tab completes this process. A Financial Aid Status record will be created for any records that do not already have one. **Package as Load** and **Package Status** control what that Financial Aid Status record will display and can be set for newly created status records only. Check **Update Existing Status Records with ISIR Data** to update any existing Financial Aid Status records information contained in the ISIR file (for imported ISIR records marked Active). Check **Import All Duplicate Transactions** if you are re-importing an ISIR file and wish to import the records again. An example would be re-importing an ISIR file to import active records that were not checked to import as active in the previous import. Selecting this check box will import all duplicates for existing student records and any that may exist in the ISIR holding table.

18. Click **Import** to complete the process. A message stating "Import Successful" will display when the process is finished.

*Note: It is very important to check **Update Existing Status Records with ISIR Data** if you are using Prioritized Packaging in order to ensure accurate packaging.*

Figure 6: Import Tab

Process Cost of Attendance Budgets

Once ISIR data has been imported, budgets should be assigned to students. The most efficient way to accomplish this task is to apply the budgets using the Financial Aid >Packaging >Prioritized >Budgets window.

In order to apply budgets to students, the Direct Cost Types and the associated Cost Items must already exist for the Academic and Financial Aid year in Financial Aid >Setup >Yearly Setup >Budgets tab. In addition, Budget Queries defined in the Budgets must be created in Financial Aid >Prioritized >Package Criteria window. The students to which budgets are assigned are identified by attaching the appropriate query to the Budget routine. Processing budgets populates the Direct Cost Type field in Financial Aid >Maintenance >Financial Aid Status Detail window. It is also possible to manually assign a budget to a single student by manually selecting the Direct Cost Type in the Financial Status Detail window.

Step-By-Step: Add a Budget

1. From the **CAMS Enterprise Home** page click **Financial Aid >Packaging >Prioritized >Budgets**. The **Budgets** window displays.

2. Select the appropriate Academic Year and Financial Aid Year, and then click **Find** to display any budgets already associated with the selected Academic and Financial Aid year. You MUST click Find first to add a new record.

3. Right-click in the data grid to add a budget, or double-click an existing budget to modify it. The **Budget** detail window displays.
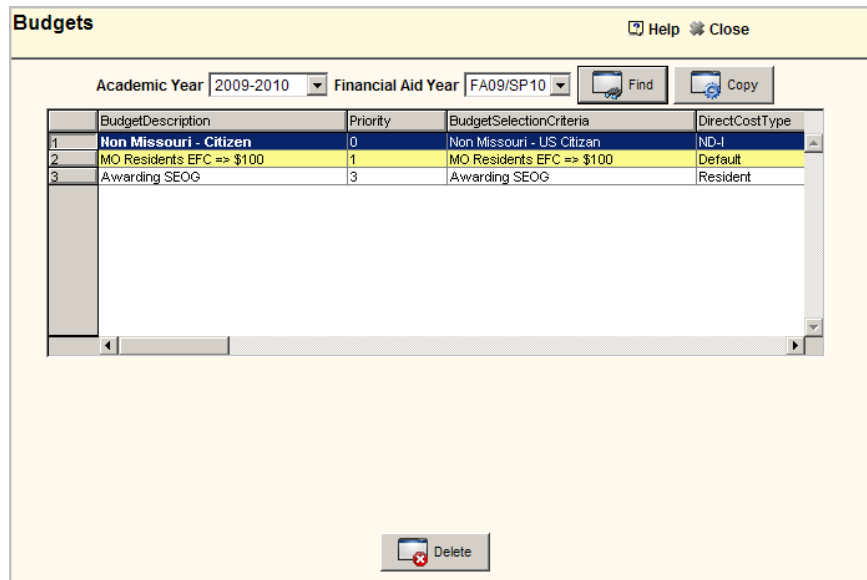
Figure 7: Budgets

4. Provide a **Budget Description**.

5. Click the search icon to open the **Student Selection Criteria** window.

Figure 8: Budget Detail

6. Double-click to select the query to associate with this budget. In this example, **Awarding SEOG** is selected.

Figure 9: Select Query

7. Enter the **Priority** (zero (0) is the highest). This indicates the order in which the budget will be applied if students qualify for multiple budgets. The highest priority budget will be applied. Using Priority numbers such as 10, 20, 30, etc. will allow insertion of budgets later without the need to renumber all budget priority numbers.

Figure 10: Budget Detail Priority

Note: A specific Priority can only be assigned once. An attempt to enter a Priority that has already been assigned to a Budget may result in an error message when saving the new or updated Budget.

8. Select the **Direct Cost Type** from the drop-down list. The **Cost Items** associated with that Direct Cost Type display in the data grid.

Figure 11: Direct Cost Type

9. Click **Add** to add the Budget, or **Cancel** to exit without saving. Once a budget has been added, it is saved and this process will not need to be repeated each time budgets are processed.

Maintain Financial Aid Budgets

Because budgets are attached to a specific Academic and Financial Aid Year, it is necessary to create them for each Academic and Financial Aid year. This can be done manually, or to save time, use the Copy button to copy all budgets associated with one particular Academic and Financial Aid year to another Academic and Financial Aid year.

Note: Copy Budgets should NOT be done here when using Copy Package. When using the Copy Package function, Package Criteria queries, Award Methodologies, and Budgets associated with the Package are copied automatically. You should ONLY copy budgets here if you will NOT be copying packages. Copying the budgets will also copy the associated Package Criteria queries.

Step-By-Step: Copy Budgets

1. From the **CAMS Enterprise Home** page click **Financial Aid >Packaging >Prioritized >Budgets**. The Budgets window displays.

2. Select the appropriate Academic Year and Financial Aid Year, and then click **Find** to display any budgets already associated with the selected Academic Year and Financial Year. You must click **Find** first to display the budgets.

Figure 12: Copy Budgets

3. Click the **Copy** button. The Copy Budgets detail window opens with the **Academic Year From** and **Financial Aid Year From** displayed.

Figure 13: Select Academic and Financial Aid Year

4. Select the **Academic Year To** and **Financial Aid Year To**.

5. Click **Copy** to copy the budgets to the new Academic and Financial Aid years or click **Cancel** to exit without copying.

Note: Be sure that all budgets for the Copy From Academic and Financial Aid years have been added prior to copying. If the Copy process occurs more than once, duplicate budgets will be created in the Copy To Academic and Financial Aid years. If duplication occurs, highlight the unwanted budget in the data grid and click Delete to remove.

Apply Budgets to Students

Step-By-Step: Process Budgets

1. From the **CAMS Enterprise Home** page click **Financial Aid >Packaging >Prioritized >Budgets**.

2. Select the appropriate Academic Year and Financial Aid Year, and then click **Find** to display any budgets already associated with the selected Academic Year and Financial Year. You must click **Find** first to display the budgets.

3. Click the **Initiate** tab. Right-click in the **Selected Budgets to Run** data grid. The **Available Budgets** list displays.
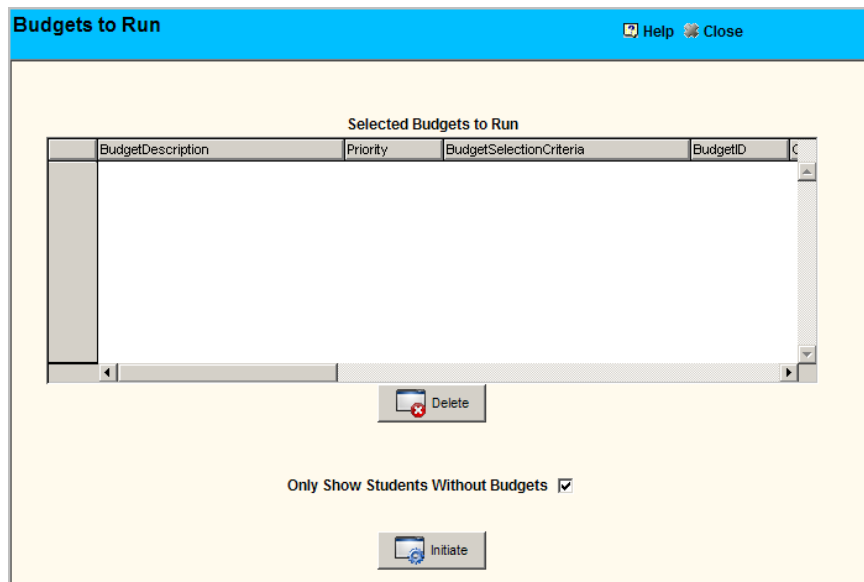
Figure 14: Select Budgets to Run grid

4. Double-click to select a single Budget, or click **Select All** to add all available Budgets to the **Selected Budgets to Run** data grid. In this example, Awarding SEOG is selected.
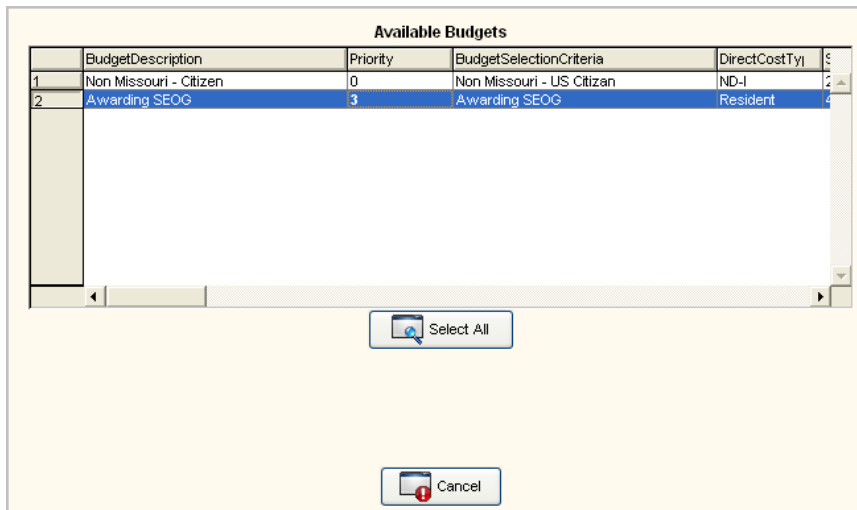
Figure 15: Select Budget to Run

Note: *If you wish to remove a Budget from the list of those that are to be run, highlight that budget and then click* ***Delete****.*

5. Click **Only Show Students Without Budgets** check box if you do not wish to display students that already have budgets defined, otherwise students that already have budgets assigned will display. In this case, budgets are applied according to a Priority of 3.

6. Click **Initiate** to display a list of students who should have the budgets applied. The **Effected Students** tab opens. By default, the students are listed by **Last Names From** "A" to **Last Name To** "Z".
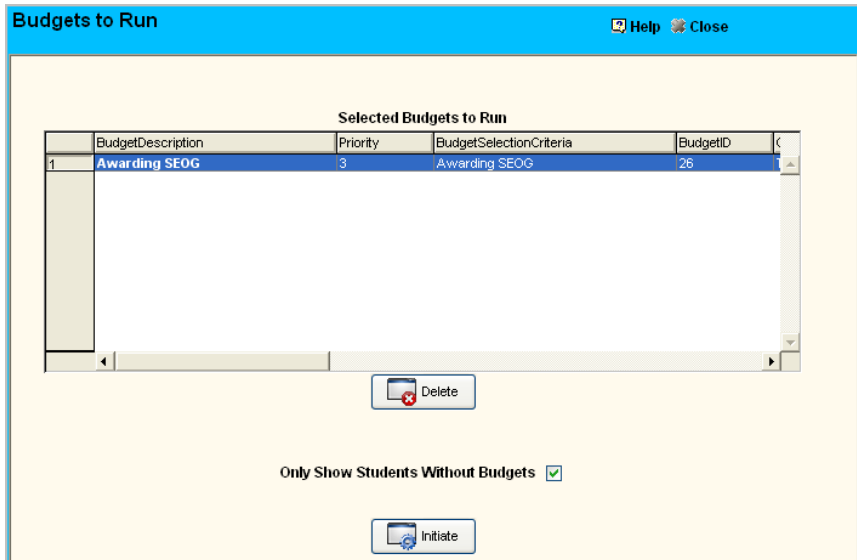

Figure 16: Initiate Budgets to Run

7. To work with fewer students, change the Last Name From or the Last Name To field and then click Find. If there are any students that should not receive the budget, highlight that record and then click Delete.
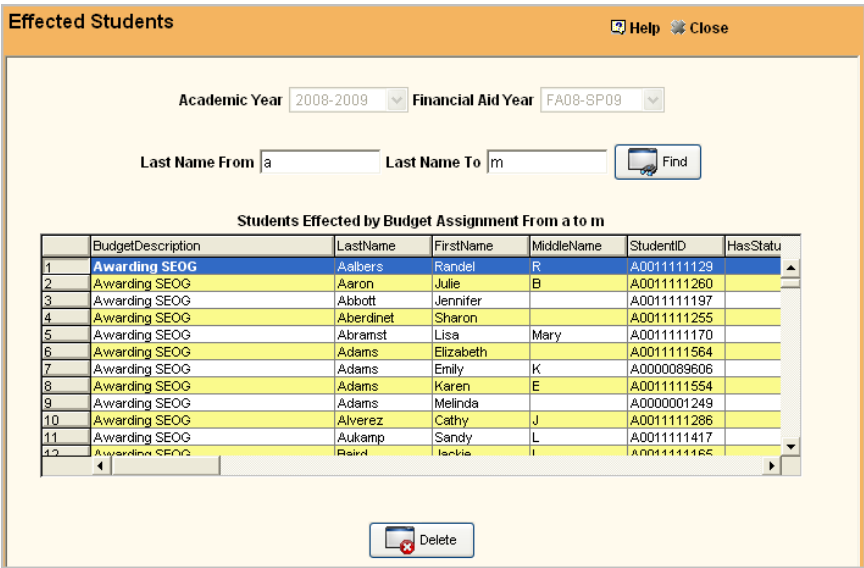
Figure 17: View Effected Students

8. Click the **Process** tab. If the "Only Show Students Without Budgets" check box was NOT checked, you can click the Overwrite Existing Budgets check box to ensure that this budget will take precedence.

9. Click the **Process** button. A confirmation message displays.
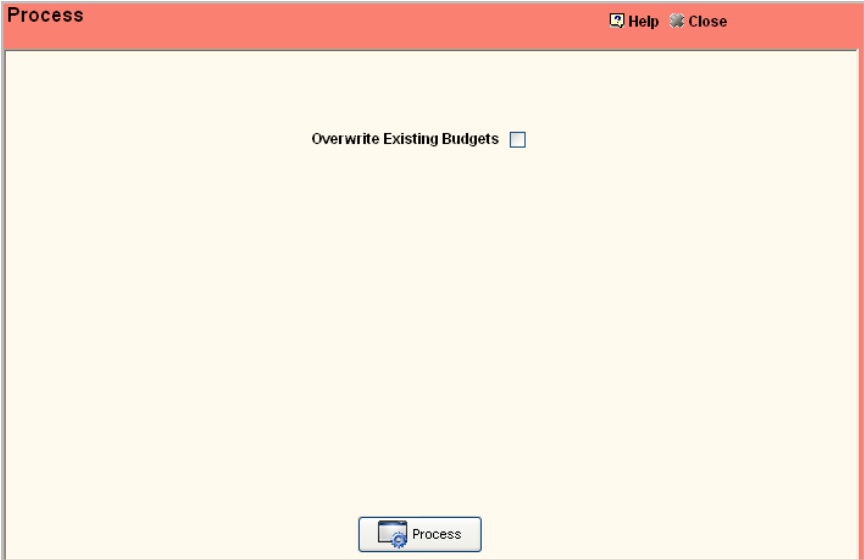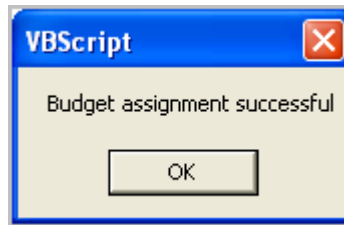

Figure 18: Process

10. Click **OK** to confirm.

Figure 19: Confirm

11. The Process button will be disabled until initiated again on the Initiate tab. This process populates the Direct Cost Type field in Financial Aid >Maintenance >Financial Aid Status Detail window.

Prioritized Packages

Prioritized Packaging uses queries to assemble the list of students for use by the Financial Aid office. These lists are then used to package students and determine the awards for which the student(s) qualify. Because these queries are created with specific criteria in place, the need to access individual student Financial Aid Record is minimized.

Once Packages are assigned, if the student's load changes, awards can be automatically adjusted according to your business rules. A configuration option in the CAMS Manager module must be set in order for this to occur (see **CAMS Manager >Configuration >More tab**). This process does not re-process the queries to determine eligibility, but simply recalculates the amount awarded based on the student's new load.

Before any Prioritized Packages can be built, there are some basic setup tasks that must be completed. These are tasks that are a part of setting up Financial Aid for any packaging methods:

- Define the awards in the **Award Reference** table.

    o Be sure that the **Need Based** check box is marked accurately before proceeding calculations.

- Create the **Academic** and **Financial Aid Years**

- Build **Budgets** for various Direct Cost Types to reflect total cost of attendance.

- Create Packaging Queries

- Build Award Methodology

See *Financial Aid Setup* for specifics on how these tasks are completed.

Note: If Prioritized Packaging contains awards of the same Award Type AND TERM that are found in Financial Aid Maintenance and added by another process, the student will be put in the exception list and therefore will not be packaged. If the (manually entered) award's Award Type in combination with the term is NOT found in any of the Award Methodologies for the package the student will be packaged as normal. The manually entered award will only affect the packaging process by bringing down remaining need if the Award Type affects need.

Create Prioritized Packages

Once queries are built, award methodologies are defined (Financial Aid Setup.pdf document), and budgets are assigned, Prioritized Packages can created. If desired, awards within those packages can be automatically updated when students add or drop classes by simply running the package again.

Step-By-Step: Define Award Packages

1. From the **CAMS Enterprise Home** page click **Financial Aid >Packaging >Prioritized >Package**. The Packaging window displays.

2. Select the appropriate **Academic Year** and **Financial Aid Year**, and then click **Find** to display any packages already associated with the selected Academic Year and Financial Year. You must click **Find** first to add a new record.

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3. Right-click in the upper data grid to add a package, or double-click an existing package to modify it. The **Package** detail window displays.
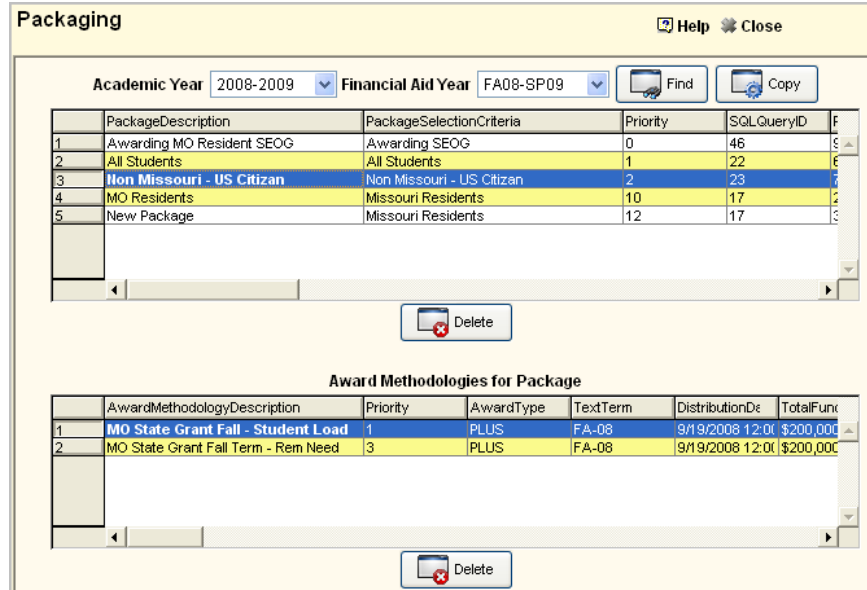

Figure 20: Add a Package

4. Enter the **Package Description** if creating a new package.

5. Click the search icon next to the **Student Selection Criteria** field to open the **Student Selection Criteria** window.
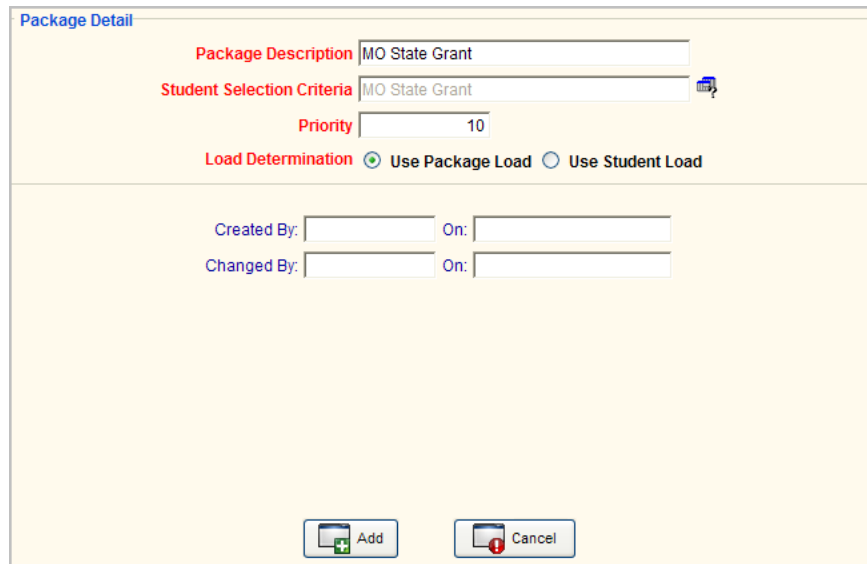

Figure 21: Package Detail

6. Double-click the query to associate with this package.

Figure 22: Select Query

7. Assign the **Priority** in which the Package should be applied. Students qualifying for multiple packages will be assigned the package with the highest priority (zero (0) is the highest). Using Priority numbers such as 10, 20, 30, etc. will allow insertion of packages later without the need to renumber all package priority numbers.

8. Select the **Load Determination** to be used for **Remaining Need** and **Student Load**. **Use Package Load** will allow pre-packaging of students based on the **Packaged for Load** field in the student's Financial Aid Status record for the Academic and Financial Aid year. **Use Student Load** will package based on the actual number of hours registered.

Note: When pre-packaging awards using the Use Package Load option, you must run the package again after registration selecting the Use Student Load option in order to make adjustments to awards for those students whose load is different than their pre-packaged load.

9. Click **Add** to save the Package, or **Cancel** to exit without saving.

Step-by Step: Attach Award Methodology to Packages

Once students have associated with packages, awards need to be added to the package. It is most common to have multiple awards defined within each packaged.

1. Highlight the appropriate Package in the upper data grid. Any Award Methodologies already associated to the Package display.

2. Right-click in the **Award Methodologies for Package** data grid to add a methodology to the package. The **Package** detail window displays.
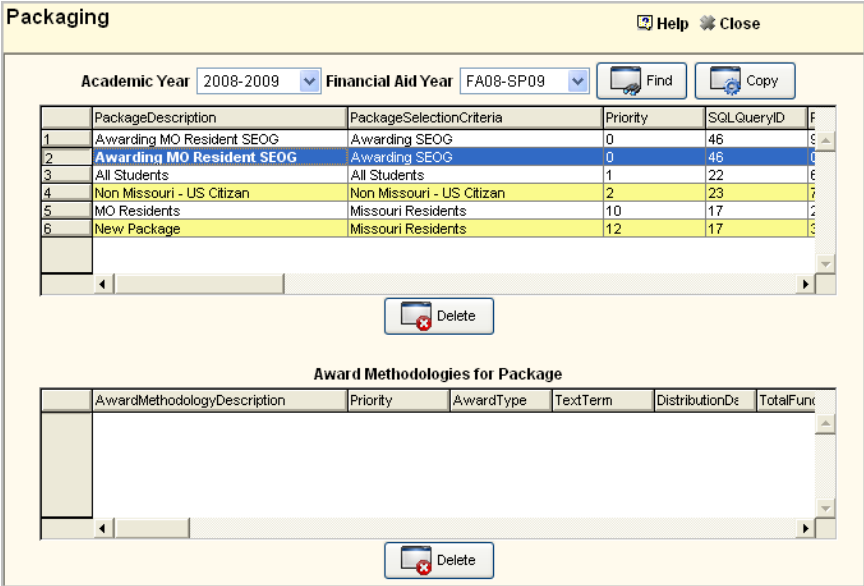
Figure 23: Package Detail

3. Click the search icon next to the **Award Methodology** field to open the **Award Methodologies** window.
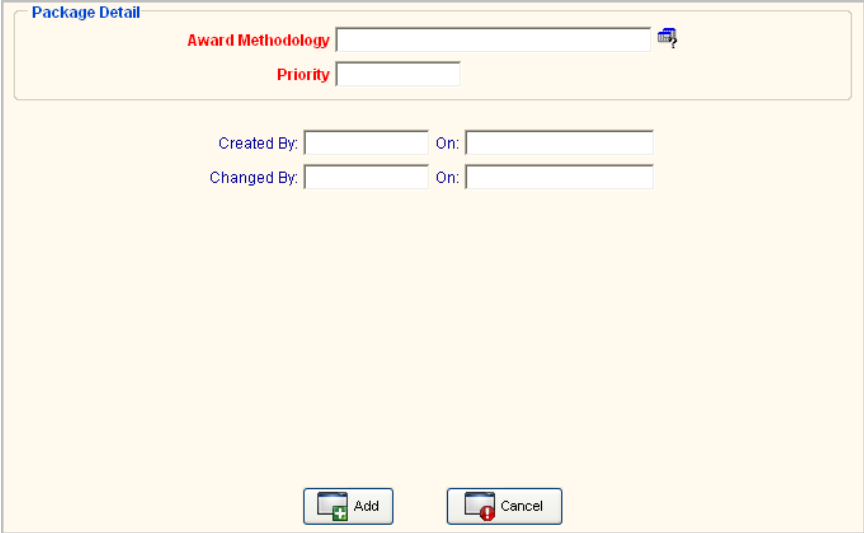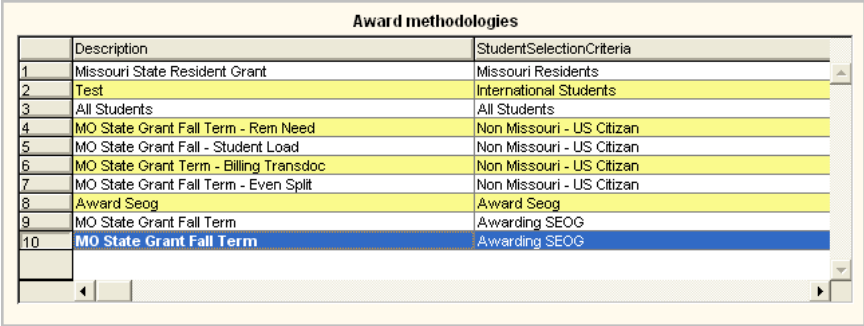
Figure 24: Package Detail Award Methodologies

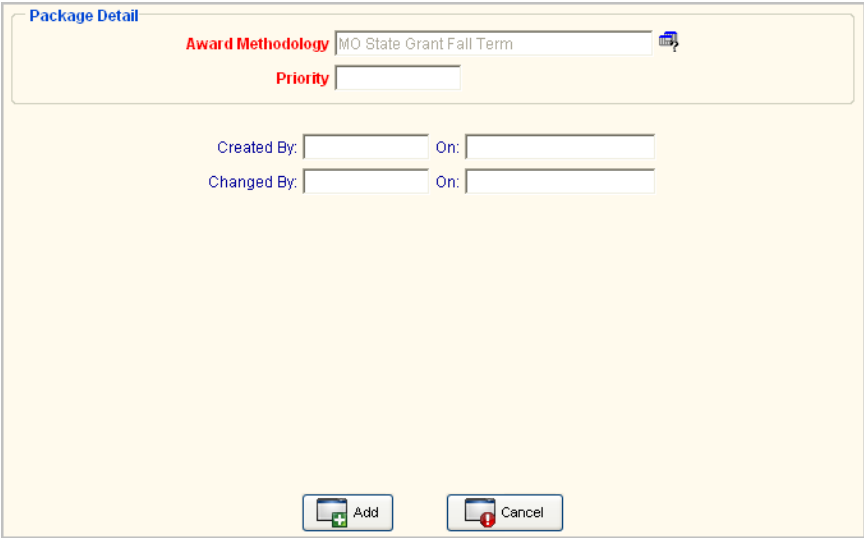4. Double click the methodology to assign to the package.

Figure 25: Assign Methodology to Package

5. Assign the **Priority** and click **Add** to associate the methodology to the Package. The Award Methodologies for Package displays. Using Priority numbers such as 10, 20, 30, etc. will allow insertion of methodologies later without the need to renumber all methodology priority numbers.

Note: Award Methodologies MUST be grouped together by award and sorted by Priority number in Packages that contain Financial Aid Years with awards distributed over multiple terms. Awards should be prioritized in the order you want to award them; unsubsidized awards should be prioritized last. This ensures correct calculations for Remaining Need.

Figure 26: Assign Priority and Add

Maintain Award Packages

Because packages are attached to a specific Academic and Financial Aid Year, it is necessary to create them for each Academic and Financial Aid year. This can be done manually, or to save time, use the Copy button to copy all packages associated with one particular Academic and Financial Aid year to another Academic and Financial Aid year.

Note: When using the Copy Package function, Package Criteria queries, Award Methodologies, and Budgets associated with the Package are copied automatically. You should NOT copy Package Criteria queries, Award Methodologies, or Budgets when using the Copy Package function.

Step-By-Step: Copy Packages

1. From the **CAMS Enterprise Home** page click **Financial Aid >Packaging >Prioritized >Package**.

2. Select the appropriate **Academic Year** and **Financial Aid Year**, and then click **Find** to display any packages already associated with the selected Academic Year and Financial Year. You must click **Find** first to display the packages.

Figure 27: Copy Packages

3. Click the **Copy** button. The Copy Packages detail window opens with the **Academic Year From** and **Financial Aid Year From** displayed.

4. Select the **Academic Year To** and **Financial Aid Year To**.

1.

Figure 28: Select Academic and Financial Aid Year

5. Click **Copy** to copy the packages to the new Academic and Financial Aid years or click **Cancel** to exit without copying.

Note: Be sure that all Packages for the Copy From Academic and Financial Aid years have been added prior to copying. If the Copy process occurs more than once, duplicate packages will be created in the Copy To Academic and Financial Aid years. If duplication occurs, highlight the unwanted package in the data grid and click Delete to remove.

Figure 29: Award Methodologies for Package

Apply Priority Packages to Students

Once packages have been created, the packages can be applied to students.

Step-By-Step: Initiate the Prioritized Packaging Process

1. From the **CAMS Enterprise Home** page click **Financial Aid >Packaging >Prioritized >Package**. The Packaging window displays.

2. Select the appropriate **Academic Year** and **Financial Aid Year**, and then click **Find** to display any packages already associated with the selected Academic Year and Financial Year. You must click **Find** first before proceeding to the **Initiate** tab.

3. Click the **Initiate** tab. The **Initiate Run** tab displays.

4. Right-click in the **Selected Packages to Run** data grid to view a list of available packages.
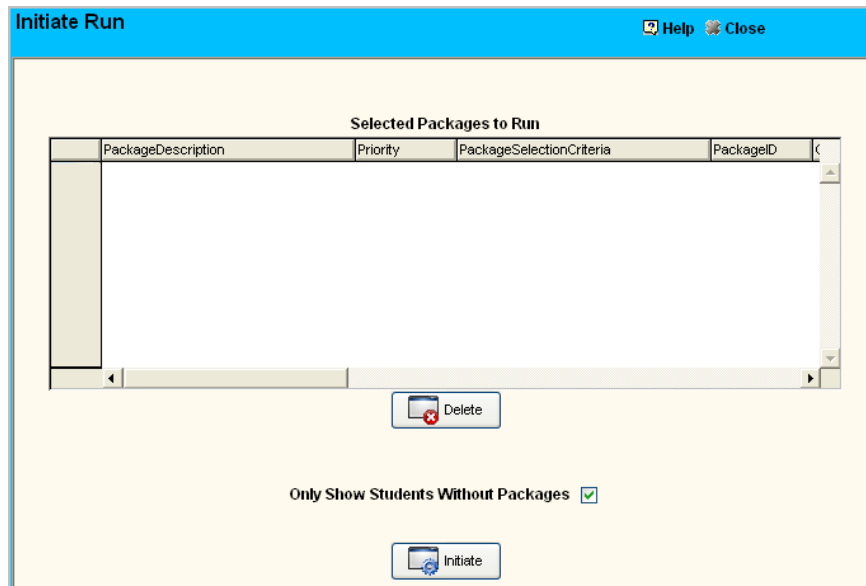
Figure 30: Selected Packages to Run

5. Double-click a single Package to run, or click **Select All** to run all packages associated with this Academic Year and Financial Aid Year.
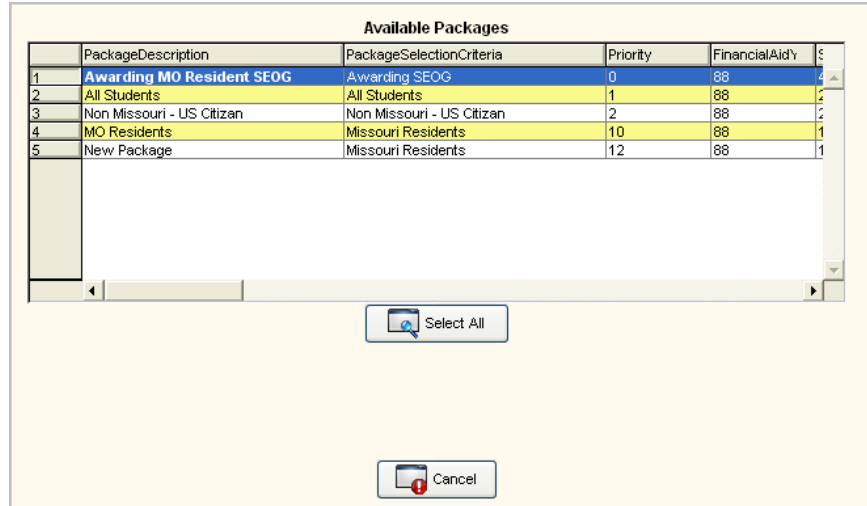
Figure 31: Select Available Package

6. If you only want to apply packages to students who have not yet had a package applied, select the check box nest to **Only Show Students Without Packages**.

7. Click **Initiate**. The Students to Package tab displays. By default, the students are listed by **Last Names From** "A" to **Last Name To** "Z".
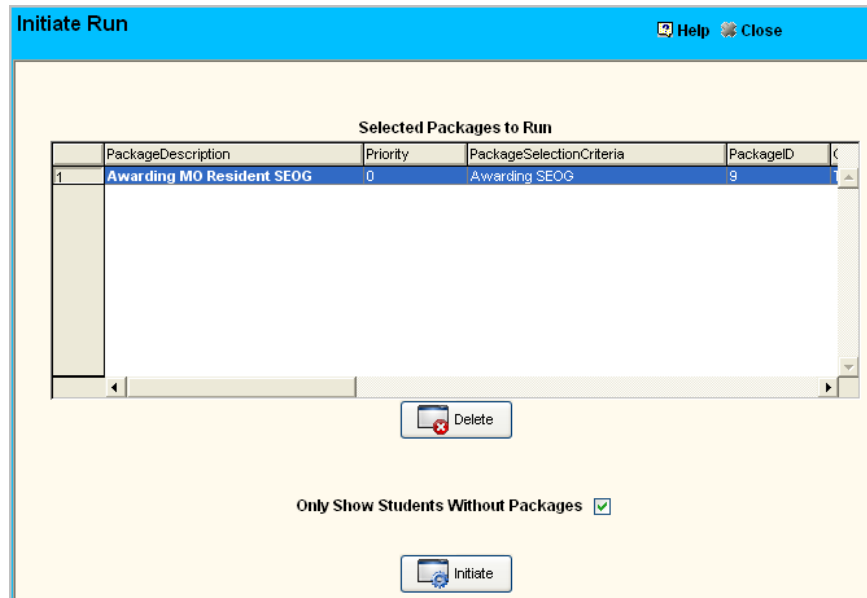
Figure 32: Initiate

8. To work with fewer students, change the **Last Name From** or the **Last Name To** field and then click **Find**. Once the **Last Name From** and **Last Name To** fields are modified, that criterion persists for the remainder of the process.

9. If there are any students that should not receive the package, highlight that record and then click **Delete**. This will remove the record from this grid only.
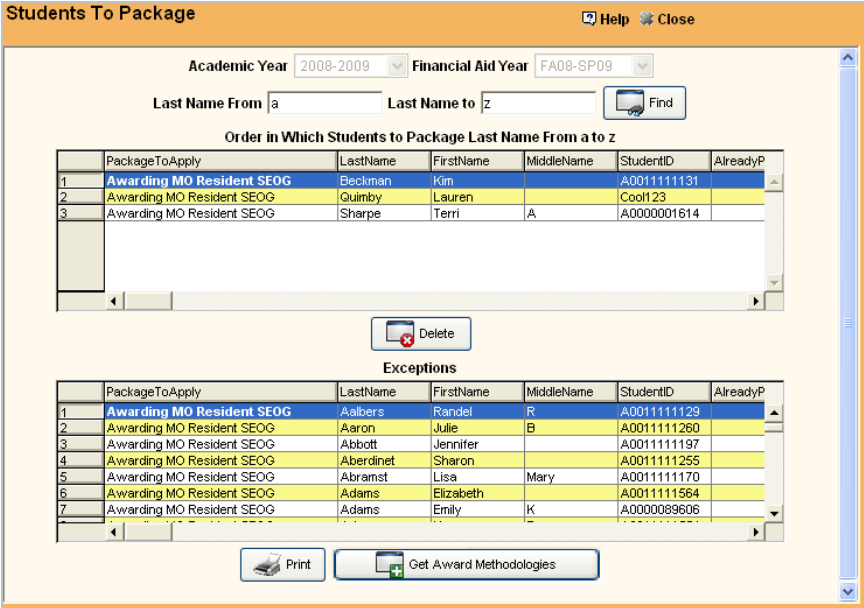
Figure 33: Students to Package

The data in the lower grid of the Students to Package window displays the list of **Exceptions**. These are students who may meet some of the packaging criteria but not all of it.

10. Click Print to print a list of exceptions.
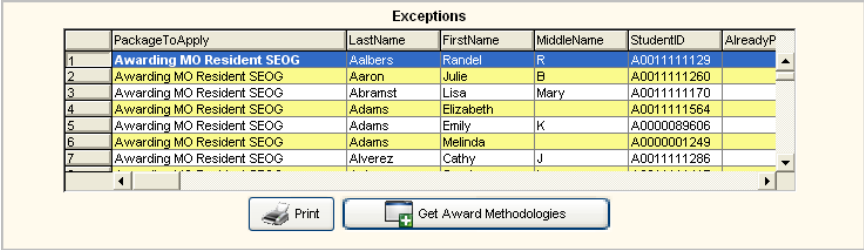
Figure 34: Print Exceptions

The list displays. Below is a sample of the Package Exception Report.

Figure 35: Sample Package Exception Report

The Exception reason could be any of the following:

- **Has Packaged Awards from Another Process** – Awards exist on the student's Financial Aid Maintenance window that were not packaged using the Prioritized Packaging process.

- **Has Status Record** – Has no Financial Aid Status record.

- **Package on FinAid Status** – Already has a Prioritized Package.

- **No Primary EFC** – The student does not have the Primary Expected Family Contribution in existing Financial Aid Status.

- **No Budget** – The student does not have a Budget assigned.

11. Click **Get Award Methodologies**. The **Methodology** tab displays the list of students.

12. If there are any students that should not receive the awards, highlight that record and click Delete. This will remove the entry from this grid only. Click Get Awards.
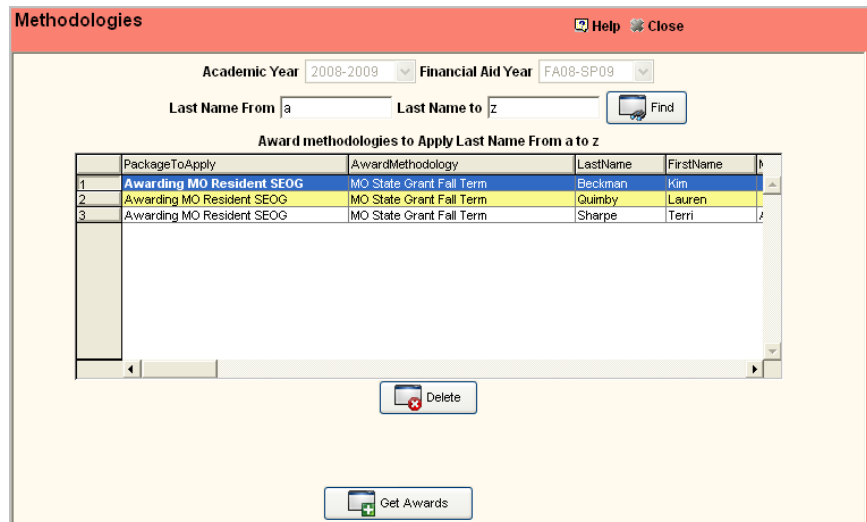
Figure 36: Get Awards

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13. The **Awards** tab displays the list of awards to apply. The **Totals** data grid displays the total amount of the award being applied to all students after packaging. Use the scroll bar at the data grid to scroll right to see the **Total Fund Available**, **the Balance Before Packaging**, and the **Balance After Packaging**. If there are any awards that should not be processed, highlight that record and click **Delete**. This will remove the entry from this grid only. If removing any award from the **Awards to Apply** data grid, be sure to click **Refresh Totals** to see the true amounts being awarded.

14. Click **Print** to print a list of all students (with Cost of Attendance, Primary EFC, and Need), methodologies, awards, and totals assigned. The Packaging Awards Detail report can be used to verify awards prior to processing the package.

*Note: Before proceeding, use this opportunity to audit your results before processing. Anything displayed prior to the **Process** button being clicked can be changed easily before actual packaging occurs.*

15. Click the **Process** tab. If there are any locked awards in this Package, a message will display on the Process tab indicating that there are locked awards. Click Unlock Awards if you wish to apply the Package to the locked awards then click Yes on the pop-up to confirm you want to unlock the awards in this package or click No to keep the awards locked. Locked awards will not be packaged.

16. To restrict processing to a specific term or terms, select the term(s) then click **Limit Processing**. Limiting terms is useful to prevent re-packaging awards that have already been accepted by COD.
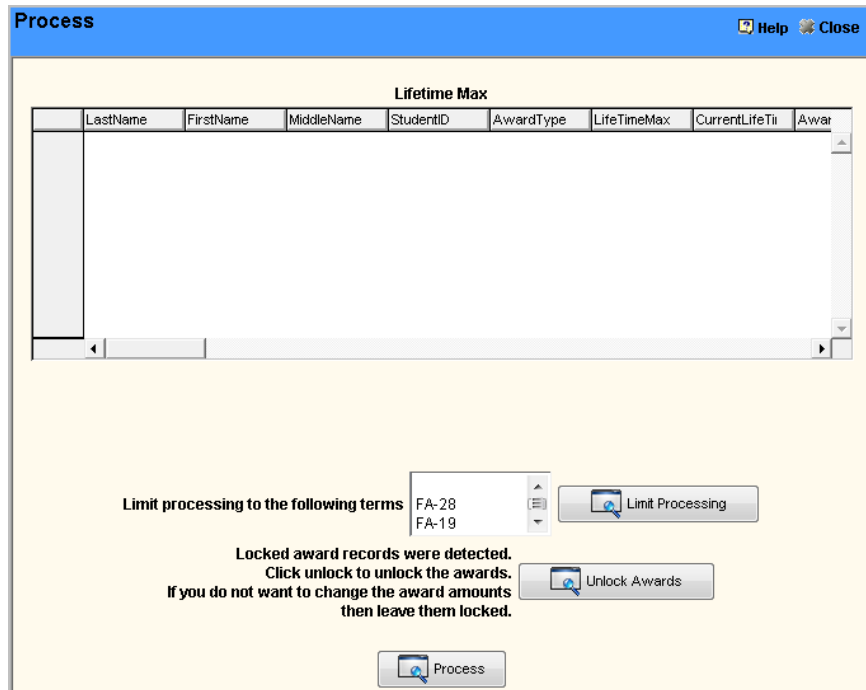
Figure 37: Process

17. A dialog box displays indicating that the processing will be limited to the specified terms. Click **Find** on the **Awards** tab if you wish to confirm the term limitation. Click **Get Awards** on the **Methodology** tab to reset the term limitations.
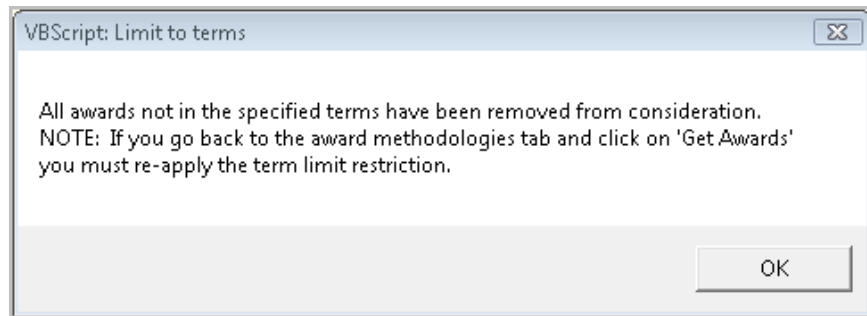
Figure 38: Limit Terms dialog

18. Click the **Process** button. The **Lifetime Max** grid displays the Lifetime maximum of the award each student may receive as determined by their active ISIR. In order for the Lifetime Max to populate, the ISIR Direct import must be used – the EDExpress ISIR import does not include this information.
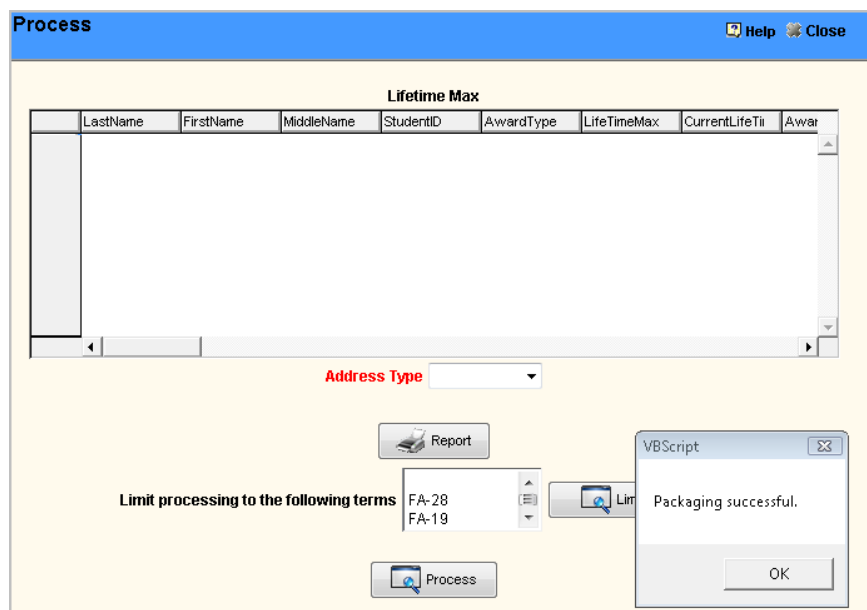
Figure 39: Process

19. A **Packaging Successful** button displays. Click **OK**.

*Note: New awards and awards where the amount has been updated the Financial Aid Maintenance **Student Accepted** and **Student Accepted Time** fields are set to NULL. This will allow the student to Accept or Decline the changed award from the Student Portal.*

20. After packaging is successful, the **Address Type** drop-down and **Report** button display.

21. Select the **Address Type** from the drop-down to indicate where the **Award Letter** will be sent.

22. Click **Report**. Award letters are generated for each student packaged that has new awards or changes in their packaged awards.
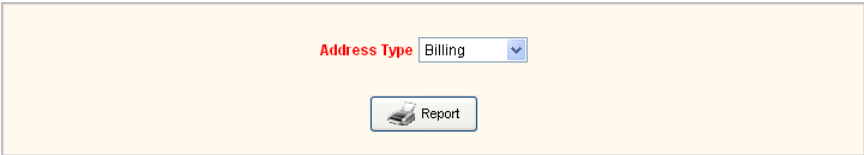
Figure 40: Report

Below is a sample **Awards Letter**.
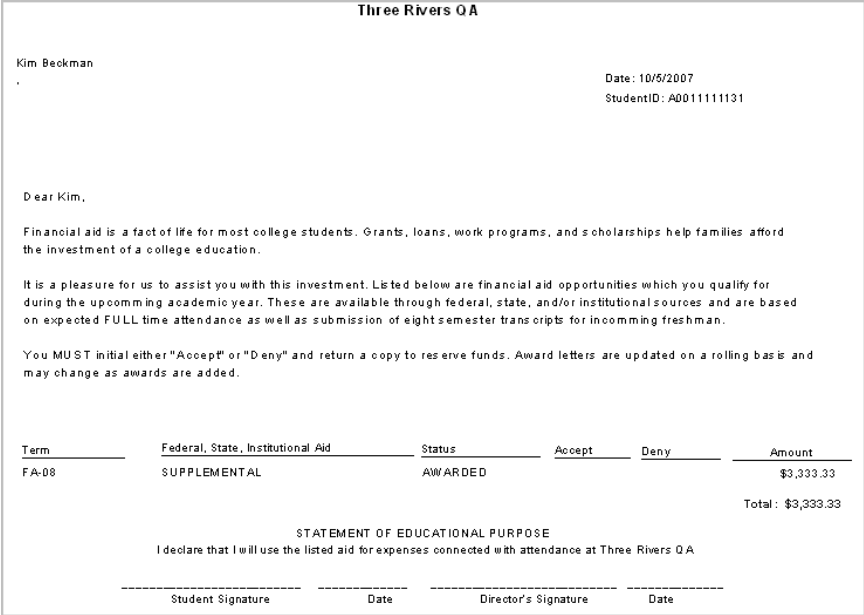
Figure 41: Sample Awards Letter

Single Student Packaging

Financial Aid awards can be packaged for single students. During the process of awarding these students through the packaging process, when applying an award or a sequence a financial aid status record will be created, if none exists. If a student's financial aid awards are packaged for the year (vs. just a single term) under a single financial aid status record then all the awards for that package will display in the student portal under their financial aid section. For example, if a student was packaged and received an award for $2000 dollars split 50/50 over FA-10 and SP-11 then when the student goes to the student portal for FA-10 they will see both awards for both terms.

Packaging Single Student

Prior to applying a package, you must have the following items in place:

- Academic Year
- Financial Aid Year
- Packaged Load
- Direct Cost
- Pell Table (Required only if using the Auto Load Pell option)

Award distributions must first be set up on the **Setup** tab for each award you wish to package. Awards are then packaged from the **Package** tab.

Step-By-Step: Apply a Package to a Single Student

1. From **CAMS Enterprise Home** page, click **Financial Aid >Packaging >Single.** The Single Packaging window opens to the Setup tab.

Figure 42: Financial Aid Single Package Setup

2. Select the appropriate **Academic** and **Financial Aid Year**. These are defined in Financial Aid >Setup >Yearly Setup.

3. Select the appropriate **Packaged as Load** amount. The Pell monetary amount awarded to the student varies depending on Packaged Load. For instance, a student packaged with Full Time may receive $1500, and a student packaged with Half Time may receive $750. CAMS also compares the Packaged Load amount with the Student Load field in the Student Status window which reflects actual number of credits for which the student is registered. If this amount is not the same, it will display when you generate the Status Exception Report in Financial Aid >Reports >BYOR.

4. Select the appropriate **Direct Cost**. Direct costs reflect the average amount that a student in a specified program may be charged. These are defined in Financial Aid >Setup >Yearly Setup >Budget Costs.

5. Place a check in the box next to **Update Existing Status Records** in order to have CAMS apply the status changes to any existing status records.

6. Select the type of award you are going to package from the **Distribution for Award Type** drop-down.

7. Click **Load From Calendar** to load the distribution terms and dates that have been set up in Yearly setup for the selected Academic Year and Financial Aid Year.

8. Double-click a distribution row in the grid to modify or right-click in the grid to manually add a distribution.

9. Highlight a row in the grid and click **Delete** to remove a distribution.

Note: The first time an award is selected for Academic Year and Financial Aid Year the distribution grid will be blank. Any distributions set up for an award will be retained and displayed each subsequent time the award is selected for that Academic Year / Financial Aid Year.

10. Click the **Package** tab. The selections made on the **Setup** tab display at the top.

Figure 43: Financial Aid Single Package

11. Click the lookup icon to select a student. Any awards already existing for the Academic Year / Financial Aid Year will display in the **Packaged Awards** grid.

12. In the **Add Option** drop-down select **Award Type** to package a single award, **Award Sequence** to package any award sequences set up for the selected **Direct Cost**, or **Pell** if you want CAMS to automatically load Pell awards.

13. Select the **Award Type**. The Award Type must have the distributions set up on the **Setup** tab. A pop-up message will display if the distributions have not yet been set up.

14. Click **Add** to add the award to the **Packaged Awards** grid.

15. Highlight a row in the grid and click **Delete** to remove the Packaged Award. Double-click a row in the grid to modify an award. Existing awards can be deleted or modified from the grid if the award isn't locked and the user permissions allow the deletion of awards in Financial Aid Maintenance. Deleting an existing award will either delete the award from the students Financial Aid Maintenance record or zero it out as applicable.

16. Click **Process** to add the package to the student. If a financial status record exists for the student in the Academic and Financial Years defined in this form, CAMS associates the awards with the existing financial status record. If a status record does not exist, CAMS will create a Financial Status record when packaging a single Award Type or an Award Sequence. The Financial Status record for a student must already exist with the Primary EFC, Packaged for Load, and Default Cost Type populated in order to package Pell.

Note: For those Awards that do not need to be applied according to a distribution calendar across multiple terms, it is most efficient to add them in Financial Aid >Maintenance >Awards tab.

Quick Awards

Use the Quick Awards window to add awards, transfer them, and run reports without having to exit the window. This feature combines the Maintenance, Transfer, and Reports functions. However, these tasks may also still be performed in their individual windows as well.

Note: Awards added from Quick Awards cannot be packaged to an Academic Year and Financial Aid Year.

		Term	DistributionDa	AwardType	AwardStatus	Amount	Dist. Amount	Orig. Amount	C
⊞	1	Fall 2008	04/10/2002	ADD/DROP-F		$0.00	$0.00	$0.00	
⊞	2	SP-06	09/17/2001	SUPPLEMENTAL	IN PROGRESS	$0.00	$0.00	$0.00	F
⊞	3	SP-06	09/17/2001	STAFFORD	IN PROGRESS	$0.00	$0.00	$0.00	F
⊞	4	SP-06	09/17/2001	PLUS	IN PROGRESS	$0.00	$0.00	$1,000.00	F
⊞	5	SP-06	09/17/2001	PLUS	IN PROGRESS	$0.00	$0.00	$0.00	F
⊞	6	Fall of 2005	04/10/2002	FPELL	APPROVED	$5,000.00	$5,000.00	$5,000.00	
⊞	7		01/01/2001	SUPPLEMENTAL	IN PROGRESS	$300.00	$285.00	$300.00	F
⊞	8		01/01/2001	STAFFORD	IN PROGRESS	$2,000.00	$1,800.00	$2,000.00	F

Figure 44: Quick Awards window

For instructions on adding or maintaining awards, see the Maintaining Financial Awards section of this document.

For instructions on transferring awards, see the Transferring Financial Awards section of this document.

Financial Aid Maintenance

The Financial Aid Maintenance window provides the following forms used to maintain students' financial aid records:

Financial Status

Holds Financial Aid Status information including package status, budgeted cost of attendance, EFC data, etc. Common Origination and Disbursement (COD) Entrance/Exit Counseling, Master Promissory Note, Credit/PLUS Application Information, and Award Usage Limits are also displayed here. It is crucial that the Status information be complete to use the automatic processes.

Financial ISIR

The ISIR tab provides a location to store Institutional Student Information Records that include information on income, allowances, contributions, etc. ISIR records are typically imported through Tools >Import >Financial Aid >ISIR Direct, but may be manually entered and/or maintained, such as locking the active ISIR record.

Financial Awards

Student Awards are maintained in the Financial Awards tab. Awards packaged through Priority Packaging, Single Student Packaging, Quick Awards, and any awards from another source are stored in this location. Awards can also be manually assigned from this tab. All of the information that is displayed during COD Import and Export for Loans, Awards, and Disbursements can be viewed here in an historical view.

Financial Documents

Used to track documents (applications, financial records, etc.) needed by your department. To access the Documents tab, first select the appropriate academic year and financial aid year on the Financial Status tab, then click the Documents tab. For more detailed information on document tracking, please refer to the Document Tracking manual.

More tab

Provides links to view a student's academic progress, demographic, billing, and address information without having to exit the Financial Aid Student Maintenance window. You can also generate reports and emails from this tab. From the Financial Aid Student Maintenance window, click the More tab to view the following options:

- **Academic Progress** – Displays Credit and Transcript completion rates. The Credit columns include all registered courses that have a Show on Transcript value of Yes, regardless of grade. The Transcript columns looks at only those graded courses that affect transcript attempted hours where Show on Transcript = Yes. View only.

- **Billing** – Displays Term, TransDoc, Financial Aid (Yes or No), Debits, Credits, and Balance. View only.

- **Report** – Allows you to generate the following reports: Award Letters, Award Ledger, and Academic Progress.

- **Address** – Displays Home, Local, and Billing addresses.

- **Email** – Opens a blank email form.

- **User Defined Fields** – In addition to the data fields already available, CAMS provides these fields to capture other data about students. The labels to these fields are configured according to your institution within the CAMS Manager module.

*Note: The **Automation** button on the Financial Status window allows certain functions to be automated for a single student, however, Priority Packaging is much more efficient. For instructions on using the Automation button, refer to the Financial Aid Maintenance Online Help file.*

Assigning Financial Aid Status

A student is assigned a financial aid status for each academic and financial aid year. Financial aid years reflect the student's period of enrollment, therefore multiple financial aid years may be applied to each academic year. Typically, a Financial Aid Status record is automatically created during the ISIR import process. It is possible, however, to manually add a Financial Status record if ISIR records are not being imported into CAMS.

Step-By-Step: Assign Financial Aid Status

1. From **CAMS Enterprise Home** page, click **Financial Aid >Maintenance** to open the Status list.

2. Select the appropriate **Academic Year** from the drop-down list. Statuses for each financial aid year display. If no Financial Aid has yet been awarded to this particular student, the Academic Year default "All" is the only possible choice.

Note: If no Financial Aid has yet been awarded to this particular student, the Academic Year default "All" is the only possible choice.

Figure 45: Status List window

3. Right-click to add a new status, or double left-click to open an existing status. The **Financial Aid Status Detail** form appears. Enter values into the following fields as appropriate.

Figure 46: Financial Aid Status Detail window

4. The **Academic Year** and **Financial Aid Year** display, unless "All" was selected. In this case, you will need to select the appropriate Academic Year and Financial Aid Year from the drop-down list. The **Package Status** is used to determine where the package is in the institutional financial aid packaging process.

5. The Financial Aid Year can be changed for existing records if no awards have been added. The Financial Aid Year selected will set the Alt Primary ## Months field on the ISIR tab as is set in Financial Aid >Setup >Yearly Setup.

6. Select the **Direct Cost Type**. The budgeted Cost of Attendance (COA) for this direct cost type appears in the Cost of Attendance data grid. Click the **View/Hide Costs** to display the grid, and to modify or add COA values to the list. The total COA is calculated from the itemized list and displays in the Total field.

Note: Direct Cost Type must be populated in order to apply awards during the Priority Packaging Process and calculate PELL amounts during any automated PELL process.

Figure 47: Cost of Attendance

7. Enter the **Primary EFC** (Expected Family Contribution). Primary EFC must be populated in order to apply Priority Packages or automated Pell processing. This is used only for calculation of Pell.

Note: Primary EFC must be populated in order to apply automated Pell processing.

8. The **Secondary EFC** is used to track additional student income not included in the Primary or Alt Primary EFC amounts. This is for reference only and is not used in packaging calculations.

9. Enter the **Alt Primary EFC** which is used to calculate need.
   (Need = COA - Alt Primary EFC).

Note: Alt Primary EFC is required for Priority Package processing and is defined as an EFC amount for a Financial Aid Year where the length is NOT 9 months.

10. The default (100%) % for Primary EFC for Remaining Need field may be changed, which allows you to enter a percentage of the student's primary EFC contribution for remaining need calculations, so that remaining need can be adjusted based on this amount. For example, if a student has a total cost of attendance for $5000, and the primary EFC contribution = $1000, remaining need would be $4000 before any awards were added. If the % for Primary EFC for Remaining Need field is populated with 50%, then the remaining need prior to adding awards would equal $4500.

11. The **Dependent** (or **Independent**) financial status indicates whether students are financially dependent upon their parents, or if they are financially self-supporting. Other values include **Dependent Rej** (Dependent rejected), **Independent Rej** (Independent rejected), and **Unknown**.

12. Select **Yes** or **No** to indicate whether the **Auto Zero EFC** is effective.

13. Click **Lock Packaging** if awards have been packaged and should not be re-packaged during the Priority Packaging Process.

14. Select **Yes** or **No** to indicate whether the student has all **Documents Complete**. This can later be used as criteria for selecting awards to transfer to Billing.

15. Select **Yes** or **No** to indicate whether the student has a previous (Prev) **Bachelor's Degree**.

16. Select **Yes** or **No** to indicate whether the student has enrolled in a graduate or professional degree program (Enrolled Grad/Prof).

17. If using Priority Packaging, the **Initial Package Date** is automatically populated. If not, select the date from the calendar.

18. If using Priority Packaging, the **Last Package Date** (most recent) is automatically populated, or select the date from the calendar.

19. Enter the **FISAP** (Fiscal Operations Report and Application to Participate) **Total Income** dollar amount.

20. Select the appropriate **Packaged for Load** amount, such as Full-Time, Part-Time, etc. Packaged for Load amount must be populated in order to apply Priority Packages, automated Pell processing, and to load award sequences.

Note: During COD Export, if a student does not have a Registration Status Student Load value for one of the terms in the Financial Aid Year, COD Export will look to the Student's Packaged for Load value on the Financial Aid Maintenance Status for the COD Enrollment Status value. For example, if the Financial Aid Year contains Fall of 2014 and Spring of 2015 and students are only registered for Fall, Spring COD Enrollment Status will be pulled from this value.

21. Key the **Verification Code** (**Y**=Yes or **N**=No).

22. Select the appropriate **Verification Status** from the following list: **Selected but not verified**, **Verified**, or **Without documentation**.

23. If the Verification Code requires a resolution, and has been resolved, click the **Resolved** checkbox.

24. Key verification resolution notes into the **Note** field.

25. The **Verification Tracking Flag** value is populated via the ISIR record upon import. This value identifies the applicable verification group for a record.

26. The **Pell Lifetime Limit** value is populated via the ISIR record upon import. This value indicates the status of the student's Pell Lifetime Limit.

27. Click **View/Hide COD Extras** to view the ACG Eligibility Payment Reason, Rigorous Highschool Program Code, Student Default Overpay Code, and Borrower (Plus) Default Overpay Code. This data is imported during the ISIR Direct Import for all new Status records and for existing status records where the option Update Existing Status Records with ISIR Data has been selected during the ISIR import.

Figure 48: COD Extras

28. If the student is applying for a PLUS or Alternative Loan, typically the student is not the Borrower, although PLUS borrowers may also be students. Contacts are used to define the non-student borrower (often this will be a parent). If the borrower is a non-student, COD integration requires that non-student borrower information is included in the COD Export file. COD requires the Borrower SSN number, (Tax ID number in the Contact record), the Birth Date (Birth Date field in the Contact record), and Country of Citizenship.

29. To add a non-student borrower, click **Page 2** to open the **Borrower Information** detail form. Use the **Search** icon located next to **Default Borrower for Student** to display a current list of contacts for the student. If the Borrower does not display, the Contact record must first be added through **Admissions >Student >Change Student >More tab >Contact** button. Otherwise, double-click to add the default borrower to the record. The **Borrower Per Award Type** data grid must be populated with **Award Type** and **Borrower for Student** ONLY where the Borrower for an award is not the default borrower. This associates the borrower with the correct award for the COD Export file. Click **Add** to add the borrower information, or **Cancel** to exit without saving. Borrowers may be copied from one Financial Aid Year to the next. Use the Copy button to choose the Financial Aid year to which you wish to copy the borrower. Click **Update** to add the borrower to the financial aid status record or **Cancel** to exit without saving.
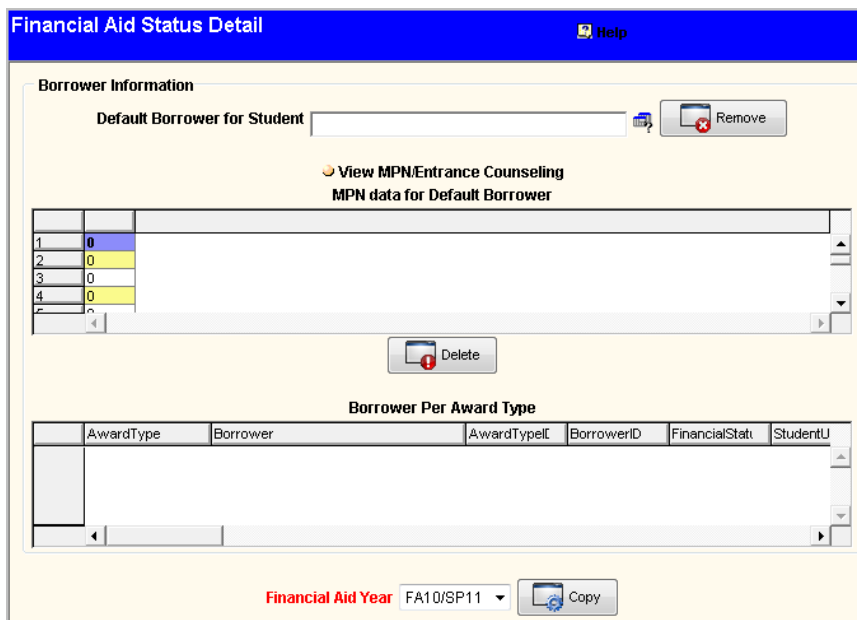

Figure 49: Financial Aid Status Detail Page 2 – Borrower Information

Before DL Plus awards can be exported to COD, one of the following conditions must exist:

- The Student's Financial Aid Status record must have a **Default Borrower** and the Default Borrower must have an MPN record linked to the DLPLUS COD Award Type, or…

- The Student's Financial Aid Status record must have a **Borrower Per Award Type** and the Student must have an MPN linked to DLPLUS COD Award Type, or…

- If neither a Default Borrower or Borrower Per Award Type exist (in the situation where the student is the PLUS borrower) the Student must have an MPN record linked to DLPLUS COD Award Type and an Entrance Counseling record.

COD Information

The COD section on the Status tab contains the student's COD Entrance/Exit Counseling, Master Promissory Note, Credit/PLUS Application, and Award Usage Limits information which are populated during the COD Import. Entrance Counseling and Master Promissory Note information must be completed before loans can be exported to COD. This area allows you to verify that the data has been completed by the student. This data is populated by the COD import process, however if necessary, records can be added, deleted, or modified here.

Step-By-Step: View Entrance/Exit Counseling, MPN, PLUS App Info, or Award Usage Limits

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Maintenance**.

2. In the COD section of the Status tab, click **View MPN**, **View Entrance/Exit Counseling**, **View Credit/PLUS App Info** or **Award Usage Limits** to toggle between these grids.

3. Double-click an entry in the grid to view the detail of the imported data or right-click to manually add an entry.

Generate Award Letters

Once financial aid has been awarded to students, you can create award letters. This is a reporting function. Awards Letters can be generated for a single student or multiple students.

Note: Academic Year and Financial Aid Year criteria are used for Standard by Package and Columns by Package reports. These reports will print the entire package for the student(s). Award Term From and Award Term To criteria are used for the Standard by Award report and may be defined further by distribution dates.

Step-By-Step: Generate an Award Letter for a Single Student

1. From the **CAMS Enterprise Home** page**,** click **Financial Aid >Report >Award Letters**. Award Letters can be generated for one student or multiple students.

Figure 50: Financial Award Letter Criteria

2. Select the **Report Format**. For "Packaging" reports, **Academic Year** and **Financial Aid Year** must be set on the Award Criteria tab. These reports will print the entire package for student(s). "Standard by Award" reports must use **Award Term From** and **Award Term To** criteria and may be defined further by distribution dates.

3. Define either the **Academic Year** and **Financial Aid Year** OR **Award Term From** and **Award Term To** fields for the report type selected. Non-selectable fields will be grayed out and unavailable.

4. In the Student Selection field, click **Single**.

Figure 51: Award Letters for Single Student

5. Click the select student icon to access the Select Student window.

6. Search for the appropriate student. When the student is located in the list, double-click to select. That student's ID and name display on the form.

7. On the Reports tab select the **Address Type**.

8. Click **Print** to generate the letter, which will display in your report viewer.

Step-By-Step: Generate Award Letters for Multiple Students

1. Select the **Report Format**. For "Packaging" reports, **Academic Year** and **Financial Aid Year** must be set on the Award Criteria tab. These reports will print the entire package for student(s). "Standard by Award" reports must use **Award Term From** and **Award Term To** criteria and may be defined further by distribution dates.

2. Define either the **Academic Year** and **Financial Aid Year** OR **Award Term From** and **Award Term To** fields for the report type selected. Non-selectable fields will be grayed out and unavailable.

3. In the Student Selection field, click **Multiple**.

Figure 52: Award Letters for Multiple Students

4. Multiple students can be selected using their SSN. Up to 100 student SSNs may be entered.

5. Enter in a student's SSN and click **Add**. The SSN is added to the SSN List field. Enter additional SSNs as needed. If an SSN is entered incorrectly highlight the entry and click **Remove**. Click **Clear** to clear all SSNs from the list.

6. You can further narrow the report output (award letters) by selecting criteria from the Multi-Students tab, such as Award Selections, Award Category, and Package information.

7. It's then possible to narrow the output even farther by selecting criteria from the Student Status tab.

8. Once all criteria have been selected, click the Reports tab; select the **Address Type**.

9. Click Print to generate the letters, which will display in your report viewer.

Request Aid from Funding Sources

Once financial aid awards have been assigned to students, they are considered Pending by CAMS until they have been funded and transferred to Billing, at which point the aid is considered a credit to the student.

Institutions may request funds from myriad sources, including State and Federal funding. While State funding varies greatly from state to state, Federal funding is the same for any institution participating in Federal Aid Programs. CAMS integrates with the Federal COD program.

Common Origination and Disbursement (COD)

Federal Grants and Loans are processed through Common Origination and Disbursement (COD) where federal aid originated from institutions is exchanged via XML files. Federal awards are exported from CAMS into COD via the institution's Student Aid Internet Gateway (SAIG) mailbox. Response files, including award disbursement amounts, are created by COD and are made available to institutions through SAIG.

Federal Loans include Stafford Subsidized, Stafford Unsubsidized, PLUS, Alternative, and Perkins. Federal Grants include PELL, ACG, SEOG, SMART, and TEACH.

There is some setup required for CAMS to produce the XML files that are exported to and imported from COD. This information is located in the Financial Aid Setup PDF document.

Any method of packaging can be used in conjunction with the COD functionality. When awards are first applied to students, a flag is set that indicates these awards should be included in the Export file. Once exported, all awards in the export can be updated to unmark them from inclusion. Only if an award that has been already included in a COD export file is changed will the include flag be set again, so that the updated award amount can be sent to COD.

COD Export

Step-By-Step: Export Awards to COD

1. From the **CAMS Enterprise Home** page click **Tools >Export >Financial Aid >COD Export.** The **COD Export** window displays.

Figure 53: COD Export window

2. In the COD setup box, enter your institution's assigned **Routing ID** (COD Entity ID), and student **Address Type** to be used in the export file.

Note: The Campus Code, Direct Loans, OPEID (Teach), and Perking fields must be populated for each campus in the Campuses reference table located in CAMS Manager >Lookup Table Options >Table Maintenance to complete your Enrollment School Code (8-digit OPE ID) in the COD Export.

The COD Export will set the CampusID field on the FinancialCODHeader during an origination to that of the latest status record in the Financial Aid Year.

3. In the COD Export Criteria box, select the **Academic Year** and **Financial Aid Year(s)**. You may select multiple Financial Aid Years in order to export all awards for an Academic Year in one export.

4. Select the **Program Year**. COD designates the Program Year as the latest year in the Academic Year. For example, if the Academic Year is 2010-2011, the Program Year is 2011.

5. Select the **Schema Version** to use for this export. The drop-down defaults to the newest Schema. Refer to the COD Technical Reference for the Schema to use for your export.

If the awards have been previously exported using a different Program Year than the one selected, a consistency check pop-up will display indicating a previous export has been done using a different Program Year. See the COD Export Consistency Check for important details later in this document.

6. The **Destination** should be set to **COD** and the **Destination Routing ID** is **00000001**, and the **Destination Mailbox** is **TG71900**. These values are the same for all schools and will not need to be set more than once.

7. To select a single Student for the current COD Export, click the lookup icon next to **Single Student ID** to open a find window. Locate and double-click the student you wish to export. To clear the selected student from this field, click the clear icon to remove the name from the field.

8. To restrict the current export to specific disbursement dates, enter those dates in the **Disbursement Date From** and/or **Disbursement Date To** fields.

9. To specify that the students in the current export must be registered in Terms that are setup in the Academic Year/Financial Aid Year selected, select "Official", "Unofficial", or both in the **Must be Registered** selection box. To further specify a specific Term or Terms where the student(s) must be registered, select the Term(s) in the **Limit to Terms** selection box.

10. To restrict the export to students who must have Financial Aid Document Tracking documents (that are linked to the Academic Year/Financial Aid Year selected) complete, select "Yes" next to **Documents Must be Complete**. Upon selecting "Yes", additional criteria, **Inc. Students w/No Docs**, displays allowing you to choose to include students without any Document Tracking documents for the Academic Year/Financial Aid Year. Select "Yes" to include these students or "No" to not include these students in the current COD Export.

11. Check the **Disbursement Release Indicator** if requesting funds from this export file (origination must have already been performed). Typically used with **Limit to Terms** in order to request funds for one Term's distribution. This must be checked in order to send zero amount awards; for example, student awards whose COD disbursements have been exported but the awards were zeroed out because the student did not attend. Zero amount awards are always processed when this box is checked.

12. Check **Process Zero Amounts** when originating awards that have already been originated, funds have not been requested (Disbursement Release Indicator has NOT been checked in a previous export), and the award has a zero amount. For example: an award that has been originated but the student did not attend and the award has been changed to a zero amount. This check box is not available if Disbursement Release Indicator is checked.

13. **Include Header/Footer** is unchecked by default because the header and footer is not required when submitting the export file through your SAIG mailbox.

14. Select awards to include in the export file by clicking the awards in the **Limit to Award Types** list. Press Ctrl on your keyboard while clicking to select more than one award type at a time.

15. Limit the awards that are set to a specific **Award Status** as necessary. For example, you may not wish to include any awards with a status of "Declined". Use with **Limit to Award Types** in order to send only the desired awards to COD.

16. Select a term (or terms) in **Limit to Terms** to export for specific terms. Typically used with **Disbursement Release Indicator** to request funds for one Term's distribution. Additionally, students must be registered either Unofficially or Officially in the selected Terms if one or both of those selections are made in the **Must be Registered** criteria above.

17. Select the **First Term Freshman** entry (or entries) to indicate which Enrollment Status(es) are used to indicate a student is a First Term Freshman that has never attended college before.

18. Select the **First Term Grad** entry (or entries) to indicate which Enrollment Status(es) are used to indicate a student is a First Term Graduate/Professional.

*Note: In determining First Term Freshman and First Term Grad, CAMS will check the latest Registration Status records Enrollment Status field within the Financial Aid Year for the student. If the student does not have one of the Enrollment Statuses selected above, CAMS will check the **College Level** on that **Registration Status** record, then use the **COD Student Level Code** that is set for that College Level in the reference Lookup table. The Student MUST have a Registration Status record that falls within the Financial Aid Year.*

19. Check **Student Must Accept Award** to export only awards that have the **Student Accepted** field set to **Yes** in Financial Aid Maintenance.

20. Enter a **Disbursement Date** if you wish to have all awards contain the same date when sent to COD. This will not change the disbursement date on the award in CAMS. The Disbursement Date can be used to facilitate early Pell disbursements and should not be used for origination exports.

21. Select **Match Academic Year Dates to Financial Aid Year Dates** if you need to set Academic Year Dates in the COD export to the same dates set for the Financial Aid Year Dates in Financial Aid >Setup >Yearly Setup for each Financial Aid Year selected to export. Any awards exported will have the Academic Year Dates set to match the Financial Aid Year Dates linked to those awards in the COD export file regardless of the dates set in Yearly Setup.

22. Click **Initiate** to find all new or changed awards, which display in the **Awards** tab. The data grid displays 200 rows per page; if your awards to be exported exceed 200, click **Next** to go to the next page of the grid.

23. To remove any Award row(s) for this COD Export highlight the row, then press the Delete key on your keyboard. This action only removes the rows from the current COD Export and does not delete any records from CAMS.

*Note: When over 200 rows display, removing a row on a page will not automatically shift the remaining rows from the next page onto the current page. Click the **Initiate** button on the **Criteria** to refresh the data.*

Figure 54: Awards tab

24. The **Disbursement Number** and **Disbursement Sequence Number** can be changed if necessary for each award in the grid. This should ONLY be done if you began using the CAMS COD Export mid-award year and you need to change the sequence numbers to allow your export to work with awards that you already have at COD using another system at the beginning of the award year. Double-click that cell in each row you wish to change then manually type the sequence number or use the arrows in the cell to increment the number. Rows with invalid Disbursement Numbers are colored teal.

Figure 55: Incorrect Disbursement Numbers

25. Click the **Loan Info** tab view **Direct Loan Information** and Status Data for COD Awards. These data grids contain verification information that can later be used if the XML validation fails. It will help determine where information may be missing, etc. Use the scroll bars at the bottom of each data grid to see more information. The data grids display 200 rows per page; if your loans or COD awards exceed 200, click **Next** to go to the next page of the grid.

Figure 56: Loan Info tab

26. Click the **Summary** tab view **Reported Financial Summary Information**, which displays totals for each award type included in the export file.

	CODAwardT'	Totalcount	TotalReporteo	TotalReporteo	DocumentID	FinancialAwa	CODSummary	
1	**DLSubsidized**	4	$15,250.00	$15,250.00	22	2,011	64	
2	DLUnsubsidizeo	3	$15,250.00	$15,250.00	22	2,011	65	
3	Pell	4	$8,535.00	$8,535.00	22	2,011	66	

Figure 57: Summary tab

27. Click the **COD Exp** tab. Enter the **File Name**, then click **Validate/Build XML**. CAMS will verify all required information for submittal to COD is included on each record in the export file. If there is any missing information, a report displays with corrections that need to be made. The export file will be created once all corrections are made. The export file will be saved to the Document Directory defined in your CAMS User Profile. Navigate to this directory to upload the file to COD via your SAIG mailbox.

Note: The COD Export file is formatted in XML format for the Schema Version selected on the Criteria tab. Although the file is formatted in XML format, if you do not use a file extension of ".xml", the file will be given a ".txt" extension upon exporting. You may either include a file extension of ".xml" or rename the file with the ".xml" extension after exporting.

28. When validating/building the COD export, CAMS looks to the award record to determine the campus value to report to COD. If a campus value is not populated on the award, CAMS looks to the student status record for the associated term to retrieve the campus value. If an associated student status record does not exist, CAMS looks to the most recent student status record to retrieve the campus value. If there are award records that do not have a campus value, click **Update Awards** to populate the award record with the derived campus value that was reported to COD.

Figure 58: COD Export

Step-By-Step: COD Export Consistency Check

CAMS performs a consistency check upon clicking the Initiate button on the COD Export. If a previous export has been done for a Program Year other than the Program Year selected a pop-up will display alerting the user. You may either cancel the initiation and select a different Program Year or, if necessary, force a change to the Program Year. This functionality is useful if an incorrect Program Year was selected for the previous export.

1. If a Program Year is selected for awards that have been previously exported using a different Program Year, a pop-up displays.
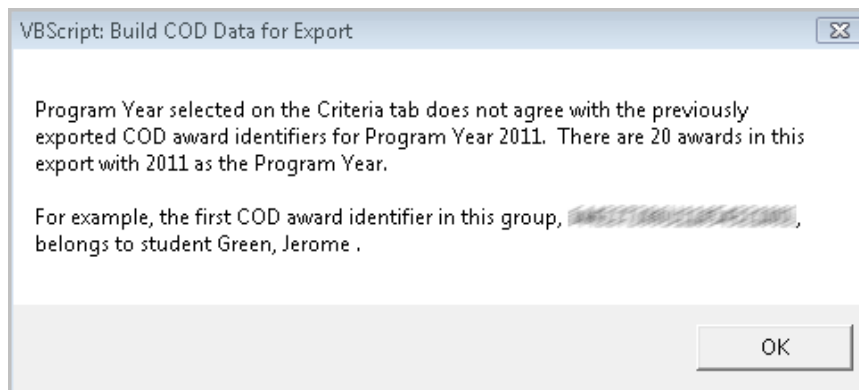

Figure 59: COD Export Consistency Check message

2. Note the previous exports Program Year. The first COD award identifier and student are indicated as an example.

3. Click **OK**; a pop-up displays indicating a Program Year conflicts with the year selected.

VBScript: Question: (step 1)

There is a year conflict between the Program Year 2012 entered in the criteria and the Program Year associated with some of the awards. Have any of the originations been accepted by COD?
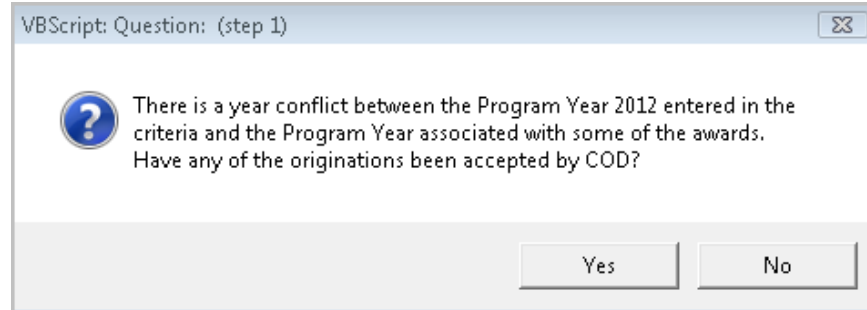
Yes   No

Figure 60: COD Export Consistency Check selected Program Year

4. If the originations have been accepted by COD or if you wish to select a different Program Year, click **Yes** to return to the COD Export Criteria tab, select the correct Program Year, then continue with the export.

5. If you wish to CHANGE the Program Year for the previously exported awards, click **No**; a pop-up displays asking if you wish to force an update to the Program Year for the previously exported awards. NOTE: the Program Year should NOT be changed for originations already accepted by COD.

VBScript: Question (Step 2)

Do you wish to force an update to make the awards all associated with Program Year 2012? Note: this is undesirable if COD has already accepted originations for the year.
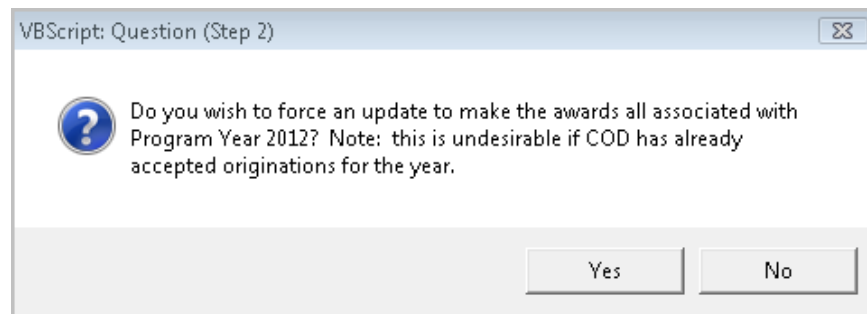
Yes   No

Figure 61: COD Export Consistency Check force update

6. Click **No** to return to the COD Export Criteria tab, select the correct Program Year, then continue with the export.

7. If you wish to force a CHANGE to the Program Year for the previously exported awards, click **Yes**.

8. A pop-up displays asking you to confirm you wish to CHANGE the Program Year for the previously exported awards. NOTE: the Program Year should NOT be changed for originations already accepted by COD.
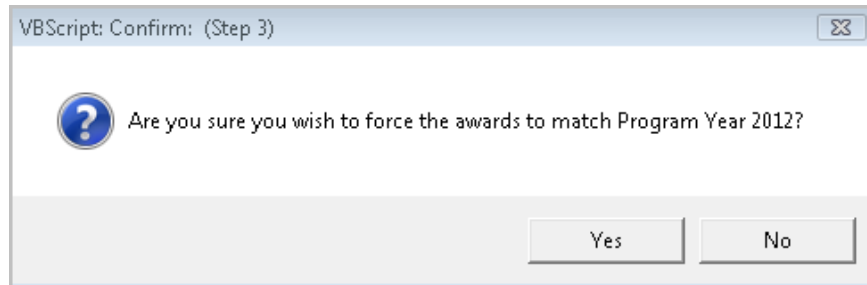

Figure 62: COD Export Consistency Check confirmation

9. This is the last opportunity to cancel the Program Year change for the previously exported awards. Click **No** to return to the COD Export Criteria tab, select the correct Program Year, then continue with the export. Click **Yes** to CHANGE the Program Year for the previously exported awards and continue with the export. NOTE: the Program Year should NOT be changed for originations already accepted by COD.

Fund Awards

Awards may be funded from a variety of sources. The process below describes how a disbursement file from COD is imported.

COD Import

COD response and Disbursement files must be downloaded from your SAIG mailbox to a folder on your SQL server, so the database can read and import the file into CAMS. This folder must be shared to appropriate personnel handling this import process.

Step-By-Step: Import COD Response/Disbursement File

1. From the **CAMS Enterprise Home** page click **Tools >Import >Financial Aid >COD Import**. The **COD Import** window displays.
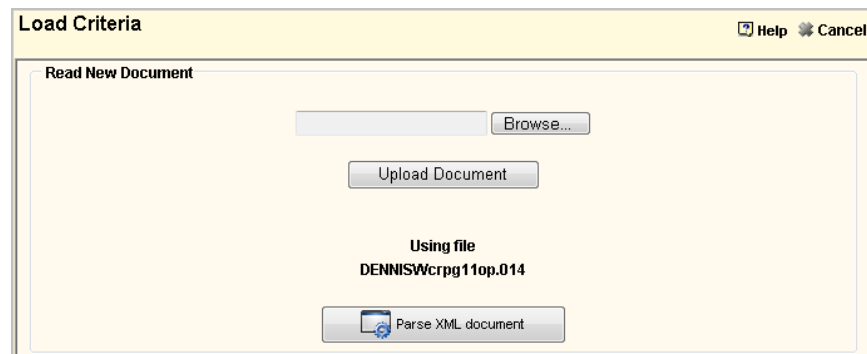
Figure 63: COD Import window

2. To read a new document, browse to the import file in the folder on your SQL server, then click **Upload Document**. Click **Parse XML document** to format the document for import and automatically increment the Disbursement Sequence Number for awards in this file.

3. The **Students** tab displays. The data grid displays 200 rows per page; if the rows in the grid exceed 200, click **Next** to go to the next page of the grid.
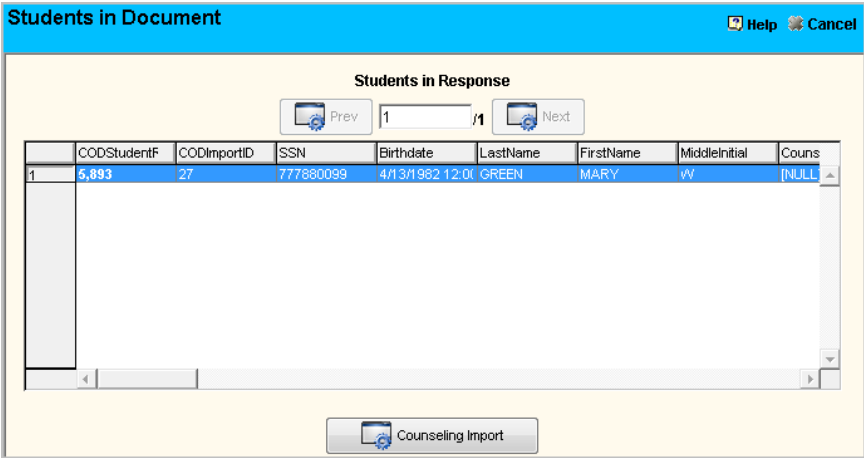

Figure 64: Students tab

*Note: Click **Counseling Import** to import a DL Entrance Counseling and Financial Awareness Counseling message class file. See page 63 for Step-By-Step instructions.*

4. Review the students included in the Import file then click the **Summary** tab, which displays the Summary and Response data from COD.
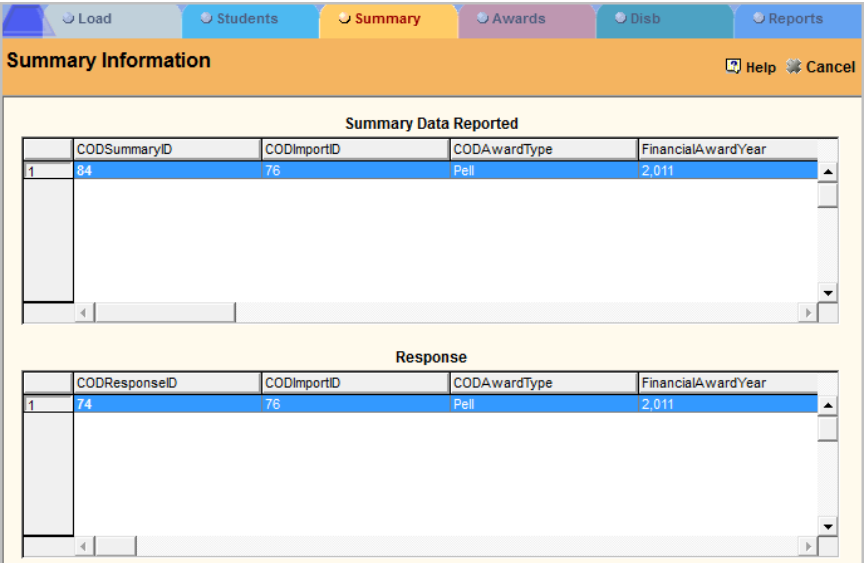

Figure 65: Summary tab

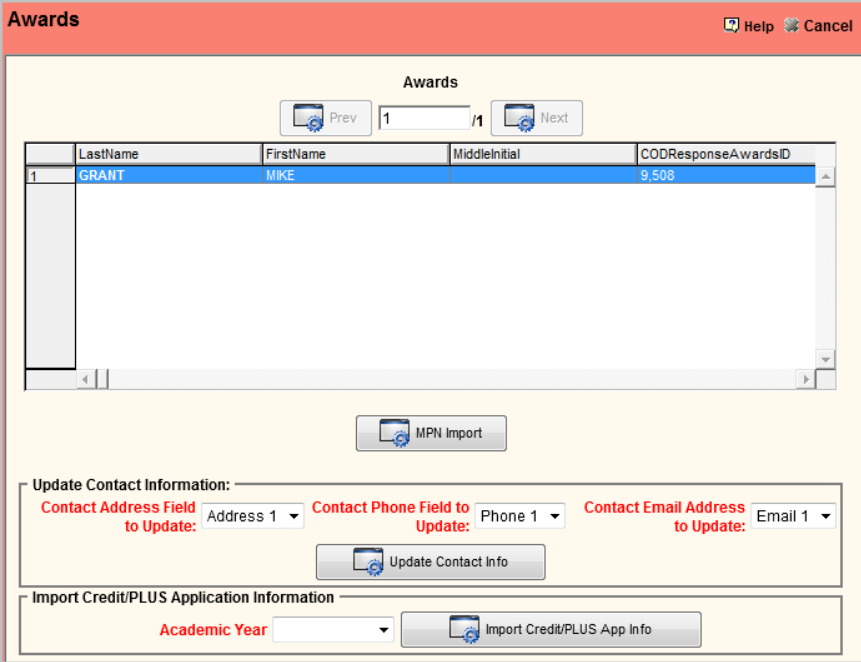5. Click the **Awards** tab to view the Awards being imported.

Figure 66: Awards tab

Note: Click MPN Import to import an MPN Response message class file. See page 64 for Step-By-Step instructions.

Click **Import Credit/PLUS App Info** to import a DL PLUS Application Acknowledgement message class file or **Update Contact Info** to update Contact information contained in a DL PLUS Application Acknowledgement file. See page 65 for Step-By-Step instructions.

6. Click the **Disb** tab to view the award distribution amounts to be imported. Click the plus sign next to each row to view the Response Error Code(s).
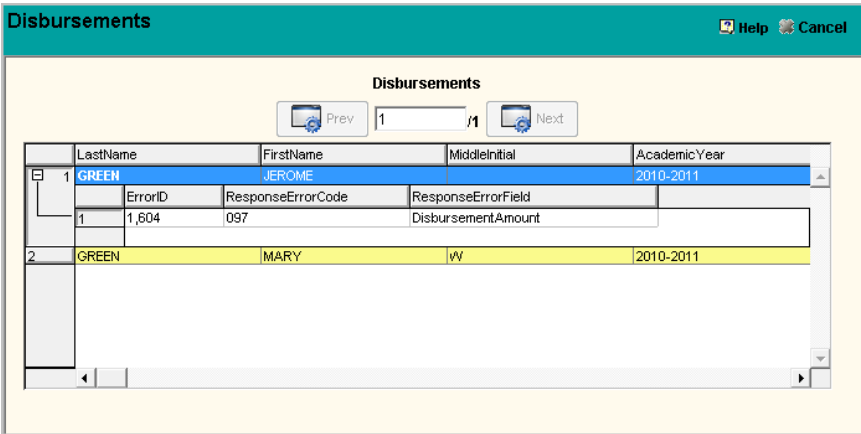

Figure 67: Disb tab

7. Click the Reports tab to set the new **Award Status** for **COD Response Code**, then click **Update** to set the Award Status in Financial Aid.

Figure 68: Reports tab

8. For response files where the Disbursement Release Indicator is set to False the Reports tab will be labeled ****Origination****. Where the Disbursement Release Indicator is set to True, the Reports tab will be labeled ****Disbursement****.

9. Click **Update Usage Limits** to add or update students' Award Usage Limits in Financial Aid >Maintenance >Status >Awards Usage Limits. For records in the COD response file that contain this information CAMS will either create a new Awards Usage Limits entry for students that do not already have an entry or update any existing entries.

COD Reporting

There are two reports available for the COD import.

- **Summary**
  - o COD Response Financial Summary by Award

- **Detail**
  - o COD Response Detail by Student by Award

Message Class Files

Step-By-Step: Import DL Entrance/Exit Counseling and Financial Awareness Counseling (CRECMYOP) File

To import DL Counseling data for students the file must be a CRECMYOP message class file.

Note: Entrance Counseling may also be imported along with DL PLUS borrower information by importing the CRCSxxOP message class file. (See page 68).

1. From the **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >COD Import** to open the COD Response Import window.

2. On the **Load** tab, click **Browse** to open the "Choose File to Upload" dialog box. Browse to and select the CRECMYOP message class file which you have downloaded from your SAIG mailbox. This file may be located anywhere that you have access such as your local hard drive or a network share.

3. Click **Upload Document**. The file is uploaded to a working location on the CAMS Enterprise server. Text displays indicating the file being used preceded by the CAMS user login name and the **Parse XML document** button displays.
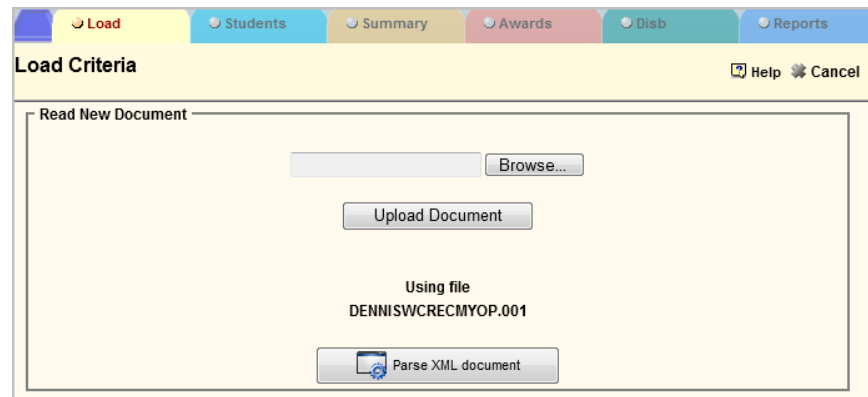

Figure 69: Entrance/Exit Counseling and Financial Awareness Counseling

4. Click **Parse XML document** to format the document for import. The **Students** tab then displays where you may review the names that will be imported. The data grid displays 200 rows per page; if the rows in the grid exceed 200, click **Next** to go to the next page of the grid.
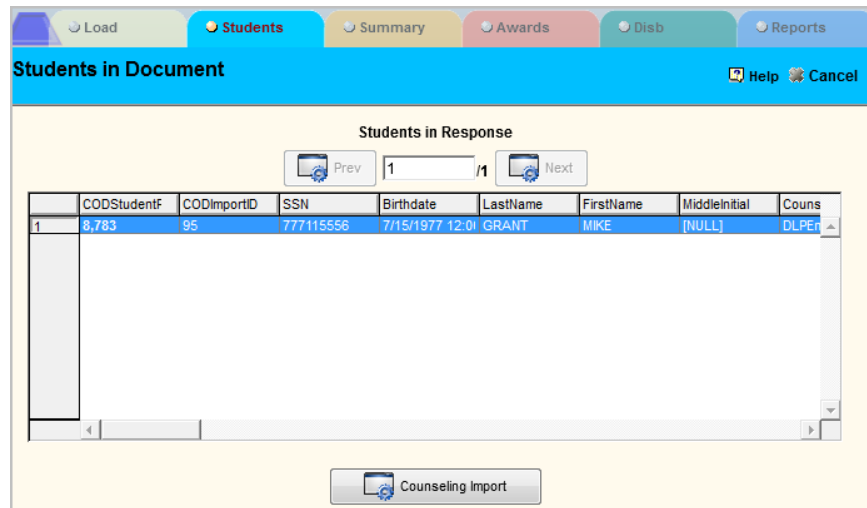
Figure 70: COD Entrance/Exit Counseling Import

5. To import the DL Entrance/Exit Counseling and Financial Awareness Counseling file, click **Counseling Import**.

6. Click **Yes** on the confirmation pop-up dialog box to confirm you wish to import the DL Counseling data or click **No** to cancel the import.

7. Upon completion a pop-up displays indicating the import was successful. Click **OK** to close this pop-up. The imported information may be viewed on the students' Financial Aid Maintenance Status tab by clicking **View Entrance/Exit Counseling** in the COD section.

Note: The Counseling record must exist on the student's Financial Aid record in order to export DL Loans via the COD Export.

Step-By-Step: Import MPN Response (Master Promissory Note) Message Class File

To import MPN Response message class data for students the file must be a CRPNxxOP (MPN Response) message class file; note that "xx" represents the two-digit Award Year in the file name.

1. From the **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >COD Import** to open the COD Response Import window.

2. On the **Load** tab, click **Browse** to open the "Choose File to Upload" dialog box. Browse to and select the CRPNxxOP (MPN Response) message class file which you have downloaded from your SAIG mailbox. This file may be located anywhere that you have access such as your local hard drive or a network share.

3. Click **Upload Document**. The file is uploaded to a working location on the CAMS Enterprise server. Text displays indicating the file being used preceded by the CAMS user login name and the **Parse XML document** button displays.
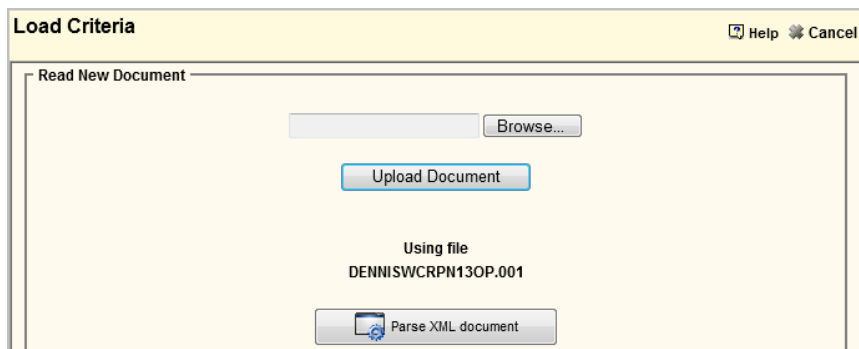
Figure 71: COD MPN Import

4. Click **Parse XML document** to format the document for import. The **Students** tab then displays where you may review the names that will be imported. The data grid displays 200 rows per page; if the rows in the grid exceed 200, click **Next** to go to the next page of the grid.

5. To import MPN Response data, click the **Awards** tab. A list of students included in the file displays in the grid.
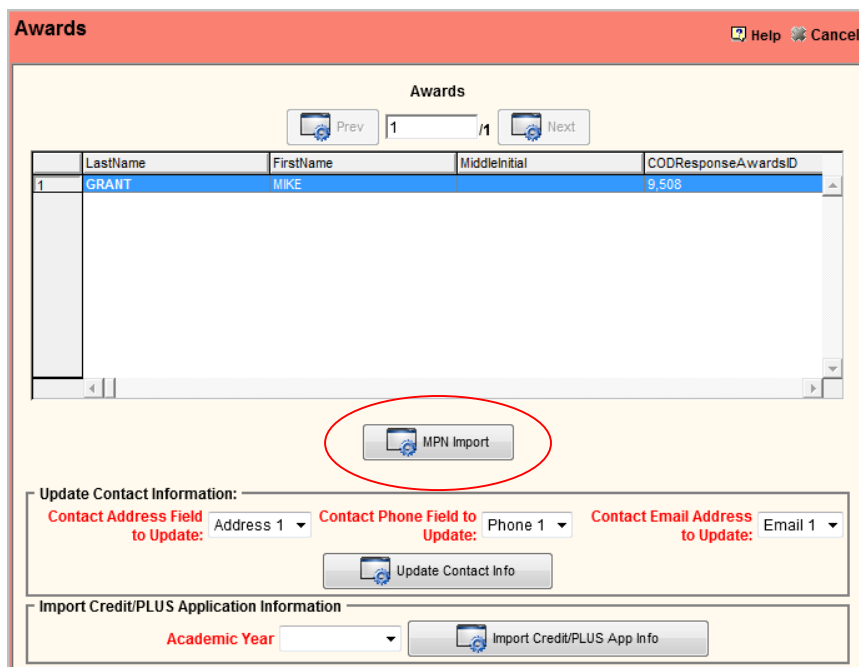

Figure 72: MPN Import

6. Click **MPN Import**.

7. Click **Yes** on the confirmation pop-up dialog box to confirm you wish to import the MPN Response data or click **No** to cancel the import.

8. Upon completion a pop-up displays indicating the import was successful. Click **OK** to close this pop-up. The imported information may be viewed on the students' Financial Aid Maintenance Status tab by clicking **View MPN** in the COD section.

Note: The MPN record must exist on the student's Financial Aid record in order to export DL Loans via the COD Export.

Step-By-Step: Import DL PLUS Application Acknowledgement Message Class File

To import DL PLUS Application Acknowledgement data for students the file must be a CRSPxxOP (DL PLUS Application Acknowledgement) message class file; note that "xx" represents the two-digit Award Year in the file name.

Note: DL PLUS may also be imported along with Entrance Counseling information by importing the CRCSxxOP message class file. (See page 68).

1. From the **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >COD Import** to open the COD Response Import window.

2. On the **Load** tab, click **Browse** to open the "Choose File to Upload" dialog box. Browse to and select the PLUS Application Acknowledgement XML file, CRSPxxOP (where "xx" is the year), which you have downloaded from your SAIG mailbox. This file may be located anywhere that you have access such as your local hard drive or a network share.

3. Click **Upload Document**. The file is uploaded to a working location on the CAMS Enterprise server. Text displays indicating the file being used preceded by the CAMS user login name and the **Parse XML document** button displays.
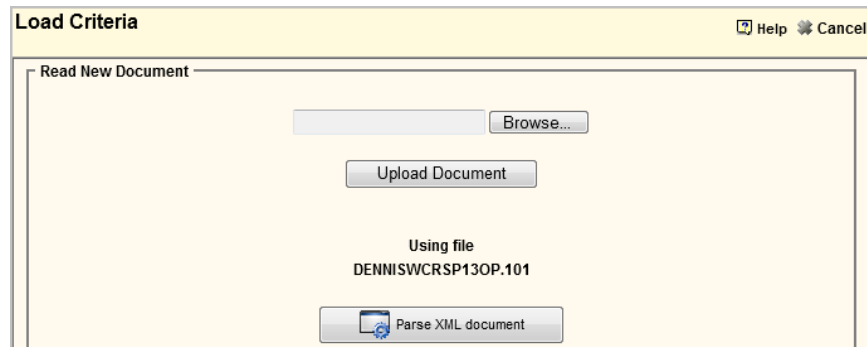

Figure 73: COD Response Import Load tab

4. Click **Parse XML document** to format the document for import. The **Students** tab then displays where you may review the names that will be imported. The data grid displays 200 rows per page; if the rows in the grid exceed 200, click **Next** to go to the next page of the grid.
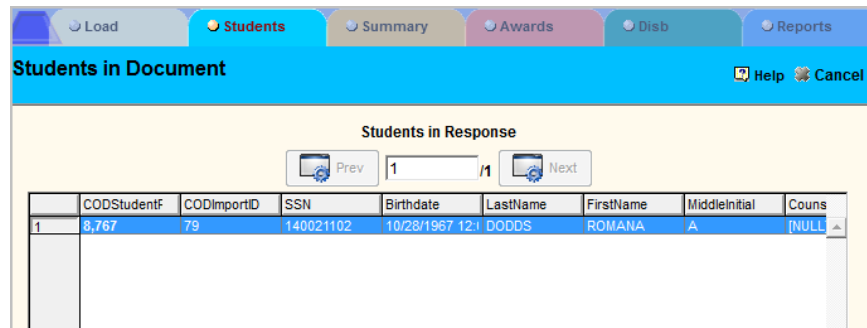

Figure 74: COD Response Import Students tab

5. To import the DL PLUS Application Acknowledgement file, click the **Awards** tab.

Figure 75: COD Response Import Awards tab

6. In the **Import Credit/PLUS Application Information** section, select the **Academic Year** for the import.

7. Click the **Import Credit/PLUS App Info** button to import the data.

8. A confirmation pop-up displays; click **Yes** to import or **No** to cancel the import.

9. Upon completion a pop-up displays indicating the import was successful. Click **OK** to close this pop-up. The imported information may be viewed on the students' Financial Aid Maintenance Status tab by clicking **View Credit/PLUS App Info** in the COD section. The information will display when one of the following conditions exists. If neither of these conditions exist, the data is still imported and will display once the following is complete:

    a. If the student is not the borrower, a Financial Aid Status record must exist for the Academic Year the PLUS Application Acknowledgement XML file was imported into. A **Default Borrower** or **Borrower Per Award Type** must be entered on **Page 2** of the status record detail.

    b. If the student is also the borrower, the data will display with or without a status record.

Note: If the Student is NOT the borrower, the Default Borrower or Borrower Per Award Type must be populated before you export COD. See page 44 for more information .

10. When importing a DL PLUS Application Acknowledgement message class file, you can automatically update contact information for any Contact where the SSN in CAMS Enterprise matches a contact SSN in the import file. Select the specific CAMS Address, Phone, and Email Address field to update then click **Update Contact Info**. A message displays confirming you wish to update Contact information in CAMS with the contact information in the import file. Click **Yes** to confirm or click **No** to cancel the update to CAMS Contacts.

Note: All Borrower fields in the file will be updated on the matching Contact record in CAMS such as First Name, Last Name, City, etc.

Figure 76: Update Contact Information

Step-By-Step: Import DL Entrance/Exit Counseling and DL PLUS Application Acknowledgement Together (CRCSxcxOP)

To import DL Entrance/Exit Counseling and DL PLUS Application Acknowledgement data for Students and Borrowers in the same import file, the file must be a CRCSxxOP (Credit Status Response) message class file; note that "xx" represents the two-digit Award Year in the file name.

1. From the **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >COD Import** to open the COD Response Import window.

2. On the **Load** tab, click **Browse** to open the "Choose File to Upload" dialog box. Browse to and select the CRCSxxOP (Credit Status Response) message class file (where "xx" is the year), which you have downloaded from your SAIG mailbox. This file may be located anywhere that you have access such as your local hard drive or a network share.

3. Click **Upload Document**. The file is uploaded to a working location on the CAMS Enterprise server. Text displays indicating the file being used preceded by the CAMS user login name and the **Parse XML document** button displays.

Load Criteria
☐ Help ✖ Cancel

Read New Document

Browse...

Upload Document

Using file
DENNISWcrcs15op.dat
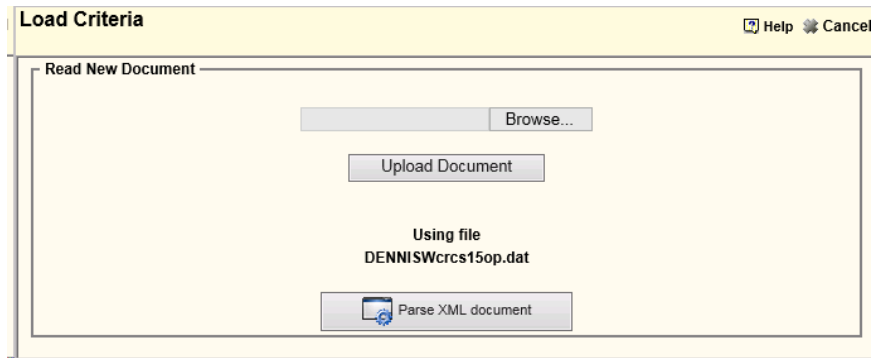
⚙ Parse XML document

Figure 77: COD Response Import Load tab

4. Click **Parse XML document** to format the document for import. The **Students** tab then displays where you may review the names that will be imported. The data grid displays 200 rows per page; if the rows in the grid exceed 200, click **Next** to go to the next page of the grid.

| ☐ Load | ☑ Students | ☐ Summary | ☐ Awards | ☐ Disb | ☐ Reports |

Students in Document
☐ Help ✖ Cancel

Students in Response

☐ Prev | 1 | /1 | ☐ Next

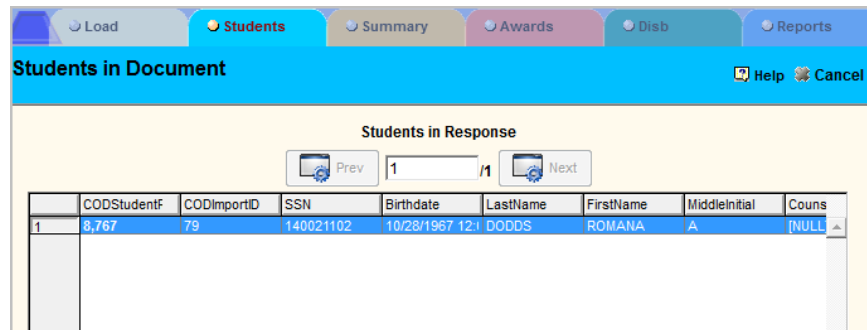|	CODStudentF	CODImportID	SSN	Birthdate	LastName	FirstName	MiddleInitial	Couns
1	8,767	79	140021102	10/28/1967 12:i	DODDS	ROMANA	A	[NULL

Figure 78: COD Response Import Students tab

5. To import the DL Entrance/Exit Counseling and Financial Awareness Counseling file, click **Counseling Import**.

6. Click **Yes** on the confirmation pop-up dialog box to confirm you wish to import the DL Counseling data or click **No** to cancel the import.

7. Upon completion a pop-up displays indicating the import was successful. Click **OK** to close this pop-up. The imported information may be viewed on the students' Financial Aid Maintenance Status tab by clicking **View Entrance/Exit Counseling** in the COD section.

Note: The Counseling record must exist on the student's Financial Aid record in order to export DL Loans via the COD Export.

8. To import the DL PLUS Application Acknowledgement file, click the **Awards** tab.
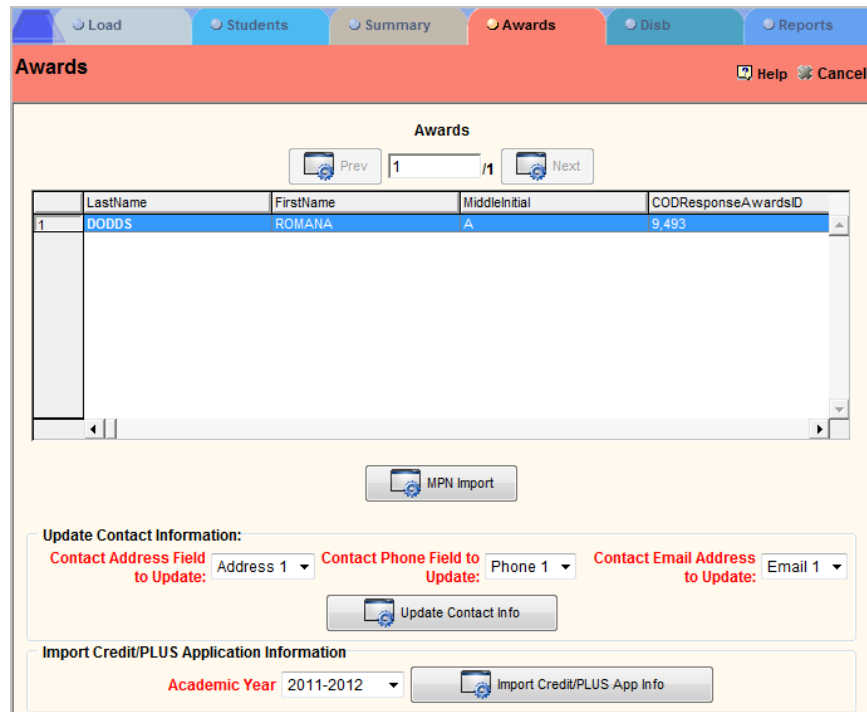
Figure 79: COD Response Import Awards tab

9. In the **Import Credit/PLUS Application Information** section, select the **Academic Year** for the import.

10. Click the **Import Credit/PLUS App Info** button to import the data.

11. A confirmation pop-up displays; click **Yes** to import or **No** to cancel the import.

12. Upon completion a pop-up displays indicating the import was successful. Click **OK** to close this pop-up. The imported information may be viewed on the students' Financial Aid Maintenance Status tab by clicking **View Credit/PLUS App Info** in the COD section.

Note: If the Student is NOT the borrower and the Contact record does not exist in CAMS for the borrower, the Contact record will be created automatically and linked to the Student record.

If the Student is NOT the borrower and the Contact record does exist in CAMS but is NOT linked to the Student, the Contact record will be automatically linked to the Student record.

If the Student and borrower do not exist in CAMS, the import is placed in a holding table until the Student and borrower (Contact) records are created. The SSN MUST be populated before saving the new Student or Contact record. Upon saving the record the imported data is added to the Financial Aid Maintenance record.

COD Messages

COD places message files in the institution's Student Aid Internet Gateway (SAIG) for various reasons. PGMRxxOP, DSDFxxOP, PGRCxxOP, and CODRBFOP messages can be imported into CAMS via Tools and viewed in the Financial Aid module (where "xx" represents the year). There are two message classes where reports are available, DSDFxxOP and PGRCxxOP.

The PGMRxxOP, Pell Multiple Reporting Record (MRR), message indicates whether a student has applied for Pell at multiple institutions during the same timeframe. The messages will also contain contact information at the other Financial Aid offices.

The DSDFxxOP, School Account Statement (Fixed-Length, Disbursement Level Loan Detail), message file can be used to print various SAS reports used for Direct Loan reconciliation with COD.

The PGRCxxOP message class can be used to print Pell reconciliation reports.

CODRBFOP message class files are COD Rebuild files that can be requested from COD to verify and correct awards in CAMS that have inconsistencies with COD information. After importing Rebuild files, you can then view and link them to the correct awards in the COD message viewer.

Step-By-Step: Import COD Message File

1. From the **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >COD Message**. The COD Message Import window opens.

Figure 80: COD Message Import

2. Click **Browse** to open the **Choose File to Upload** window.

Note: The import file must be located on a share and you must browse to the file through Network Places, even if the file is on the local machine, so that a Universal Naming Convention (UNC) path is listed in the File field. Example: \\MyComputer\MyFolder. It cannot use a drive:\filename format such as C:\importfile.txt.

3. Select the appropriate file, then click **Open**. The file name displays in the File Name field of the Select COD Message Import window.

4. Select the **Message Class** to import and the **Academic Year** for which you are importing messages.

5. Click **Import**. A confirmation displays indicating the import was successful. If a file is chosen that isn't compatible with the Message Class, a dialog box displays indicating this. Select a file that is compatible with the selected Message Class, then click **Import** again.

Step-By-Step: View COD Message File

1. From the **CAMS Enterprise Home** page, click **Financial Aid >COD**. The COD Messages window opens.

Figure 81: COD Messages

2. Select the **Message Class**, **Record Type** (for DSDFxxOP messages), **Academic Year** and **Import Date** for messages you wish to view.

3. Click **Read Message** to populate the grid.

4. Scroll right to view all information contained in the message file. The grid can be sorted by clicking the header button in any column to sort by that column.

5. Select the PGMR **Message Class** and click **Read Message** to display an additional field, **Filter to Record Type**. Select the record type, then click **Filter Message** to display only that type in the grid. The Record Type indicates why the record is being sent to the school by COD.

Figure 82: PGMR Record Type filter

6. For Message Classes where reporting is available the **Print** button will be enabled and the report drop-down will display one or more reports that are related to the Message Class and Record Type selected.

7. Select the report then click **Print** to display the report.

There are seven reports available for the DSDFxxOP Message Class.

Select a different **Record Type** then click **Read Message** to populate the grid with messages and enable reports associated with that Record Type.

- Record Type "C" – Monthly SAS Cash Detail

- Record Type "D" – "Monthly SAS Loan and Disbursement Detail" and "Disbursement Detail Comparison".

Note: When Record Type D is selected, if only D entries are in the imported file, only the Disbursement Detail Comparison report will have data in it and will display in the drop-down. When Record Type D is selected, there must also be M entries in the imported file for the Monthly SAS Loan and Disbursement Detail to have data in it and display in the drop-down.

- Record Type "L" – No report available

- Record Type "M" – SAS Monthly Disbursement Summary

- Record Type "T" – Monthly SAS Cash Summary and Yearly SAS Cash Summary

- Record Type "Y" – SAS Yearly Disbursement Summary

Step-By-Step: COD Rebuild Files

Rebuild files can be requested from COD when there are discrepancies between the awards in CAMS and on the COD website. These discrepancies can occur when awards are added to students on the COD website and also added in CAMS or never added in CAMS. In the latter case, the award would need to be added in CAMS prior to linking it to the COD award here.

Once the Rebuild file has been imported it can be viewed and reported on from the COD Messages window. The awards listed in the Rebuild file can then be linked to the correct award in CAMS. Once linked, the award will have the correct Disbursement Number and COD Financial Award ID after which you may work with the award via your normal processes in CAMS.

1. From the **CAMS Enterprise Home** page, click **Financial Aid >COD**. The COD Messages window opens.

2. Select the CODRBFOP **Message Class**, **Record Type** D, **Academic Year**, and the **Import Date** you wish to work with.

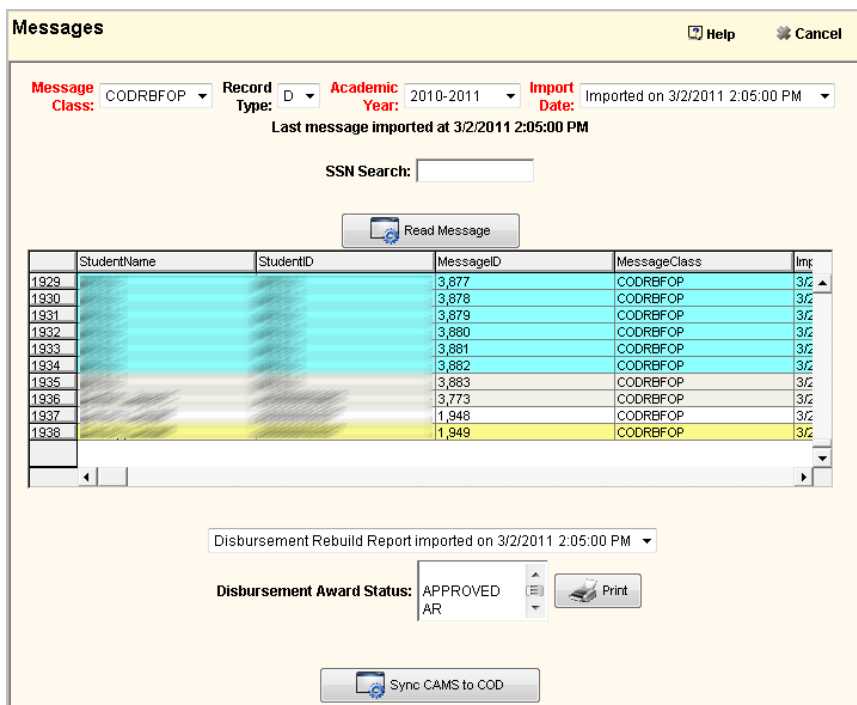3. Click **Read Message**. The grid populates with the imported records.

Figure 83: CODRBFOP Message Class

4. To filter the list by SSN, enter a student Social Security Number in the **SSN Search** field, then click **Read Message**.

5. Rows colored light brown indicate disbursements where the Disbursement Sequence Number is equal to or over 66. These indicate special circumstances such as a change to the disbursement of the same COD Financial Award ID, Disbursement Number or the Disbursement Sequence Number equals the previous disbursement Sequence number.

6. Awards with discrepancies between COD and CAMS are highlighted in teal.
    Students are listed by Student Name and Student ID and can be further
    identified by their SSN which is the first 9 digits in the
    CODFinancialAwardID column. Double-click a row in the grid for the teal
    colored rows to open the **Disbursement Rebuild Details** window. The best
    matched awards for the student display.

Figure 84: Disbursement Rebuild Details

7. Highlight the award in CAMS that should be linked to the COD award then
    click **Link**. If an award has been incorrectly linked, highlight the award then
    click **UnLink**. After linking an award, click **Update** to exit the detail window.

8. Click **Print** to display a comparison report of the amounts in the COD Rebuild
    file and the amounts in CAMS. The report is sorted by Student Name and
    COD Financial Award ID.

9. Select specific **Disbursement Award Status(es)** to limit the report to only
    those statuses as set in Financial Aid Maintenance. This is useful to report
    only on awards that are marked in CAMS to be disbursed. For example, an
    award may be in this Rebuild file but the amount has been changed in CAMS
    and it has not been re-originated yet. Therefore you may not want to report
    on these awards in your comparison report thus reducing the amount of
    items you will need to compare.

10. Once linking has been completed, click **Sync CAMS to COD** to update the
    awards in CAMS.

Check Release

Check Release is used to identify awards en masse that are funded and to update Award Status, which is typically used to control which awards are transferred to billing. In addition, a Check Signed Date field on each award can be recorded en masse. In most cases, awards would be transferred to billing immediately following the Check Release process.

Step-By-Step: Perform Check Release Process

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Automated Processes >Check Release**. The Check Release criteria page displays.

Figure 85: Check Release Criteria window

2. Select a **Term** during which the awards are funded.

3. If applicable, select additional criteria to further delineate awards ready for check release. Use **Award Type** to easily identify those awards funded. This is especially helpful when using a roster of funded aid for comparison purposes.

4. Set the **Updated Award Status** value to indicate awards are ready for transfer to Billing and subsequent disbursement. If desired, select the **Checked Signed Date**. This field in the Award detail will be updated with this date, but does NOT change the Award distribution date.

5. Click **Find**.

The Student Records screen displays all awards that meet the selected criteria.
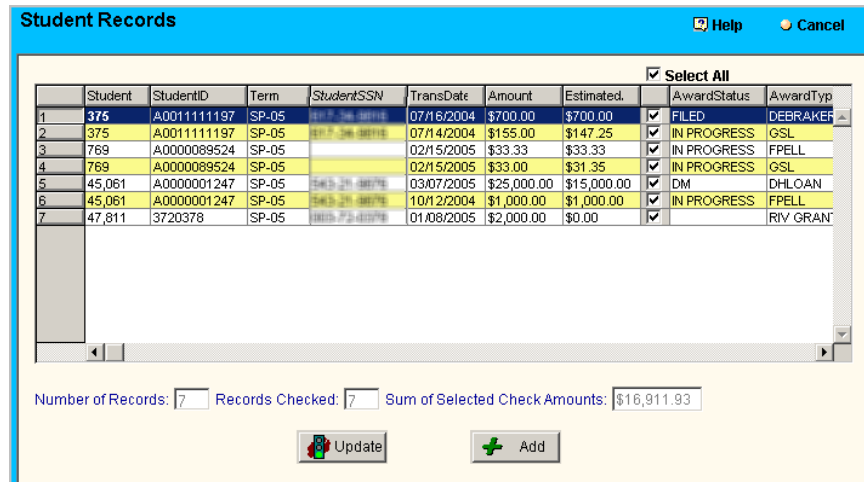
Figure 86: Check Release Student Records window

6. Select the **Select All** checkbox or individually select those awards that should be processed. The fields below the data grid display the **Number of Records**, number of **Records Checked**, and the **Sum of Selected Check Amounts**. Typically, the sum of check amounts should match the sum of the disbursement amount for that award type.

*Note: If verifying the displayed records against an edit list missing awards can be added quickly. To add additional awards to a student and have them marked with the check release date, click the **Add** button. A blank awards screen displays. Select the student and fill in required fields then click **Add**. The added award displays in **Quick Awards** and under the **All** option in the **Filter to Package** field in a student's maintenance screen.*

7. Click **Update**. A confirmation message displays, "You have selected number Financial Aid Awards to update. Do you wish to continue?" Click **Yes** to process the request. When finished, the Check Release Criteria window displays.

Transfer Financial Aid Awards to Billing

Once awards are funded and ready to be disbursed, you will transfer the awards to the Billing module. It is only from the Billing module that awards can be distributed to the student ledger. To transfer awards, first select the appropriate criteria for award selection. Next, click transfer to review a list of all awards selected to be transferred. This list can be printed. When you are satisfied with the list of awards, click Transfer, name the transfer batch, then click Transfer again. The batch of awards is transferred to the Billing module.

Step-By-Step: Transfer Awards to Billing

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Transfer**. The Financial Aid Transfer Criteria tab displays the Award Selection form.

Figure 87: Transfer Award Selection window

2. Click the appropriate **Transfer Term(s).** You must select at least one transfer term. You may select more than one term by holding down the Shift key while clicking each term. Only consecutive terms may be selected this way. Many times, awards are only funded one term at a time.

3. If you wish to transfer awards for only one student, click the search icon next to the **Single Student ID** field, then select the student. To transfer awards for multiple students, leave this field blank. All awards matching the criteria entered for that particular term or terms will be displayed in the Selected Awards list.

4. Other recommended criteria by which awards can be selected include the following:

   - Award Type – Define the award being funded

   - Award Status – Choose awards that have been set for disbursement via the Check Release or manual update

   - Student(s) Accepted – Yes to include awards students accepted via the Student Portals

5. Additional criteria may be used to further narrow the list of awards to transfer.

6. Once all criteria has been selected, click the **Transfer** tab, and then click the **Transfer** button. CAMS locates all awards that match the defined criteria and displays them in the **Awards to Transfer** list.

Note: In order to prevent data loss when transferring awards, any awards that meet the selected criteria and are deleted by any CAMS user during the transfer process will not be transferred to Billing. A list of any awards deleted by a CAMS user and not transferred will display after the transfer process is completed.

Figure 88: Awards to Transfer window

7. To easily verify awards to be transferred, you can Export the list as a .txt file to the Document Directory defined in your CAMS User Profile, or select a **Report Format** then click **Print** to display a Transfer Report.

8. Click **Transfer**. The Billing Batch Information Transfer Options form displays. Enter a Batch Description. If you want all awards to have the same Effective Transaction Date, then select the appropriate date from the drop-down calendar. Leave the Effective Transaction Date field blank to retain the effective dates on each individual award.

9. Click **Transfer**. CAMS transfers the batch to the billing module. A "Transfer Successful" message displays upon completion. Click **OK** on this pop-up message to view any awards in the Awards to Transfer list that may have been deleted before the transfer process completed.

Note: In order to prevent data loss when transferring awards, any awards that meet the selected criteria and are deleted by any CAMS user during the transfer process will not be transferred to Billing. A list of any awards deleted by a CAMS user and not transferred will display after the transfer process is completed.
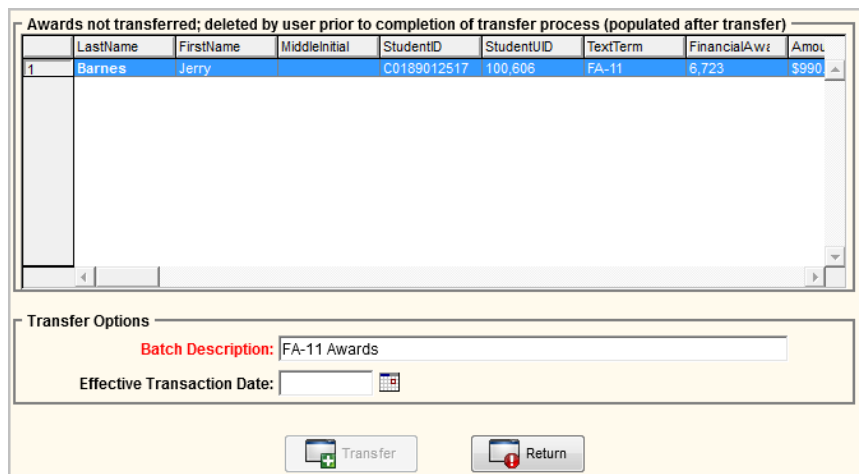
Figure 89: Awards deleted by CAMS user during transfer process

10. Click **Return** to close the detail screen and return to the Criteria tab.

11. To view the batch, go to **Billing >Batch**. Double-click the batch to view individual awards.

Awards Still Pending on Statements

Sometimes Financial Aid and/or Billing personnel say an award has been transferred but the billing statement still says the award is pending.

To see if an award has actually been transferred you can refer to the Sent to Billing field on the award. If there is no text in the Sent to Billing field it has not been transferred. If Yes displays, it has been transferred. If No displays then the award has been deleted from the Billing Batch after it was originally transferred. It may need to be to be adjusted in Financial Aid and then retransferred to Billing.

Maintaining Financial Awards

When a student is assigned a financial award, regardless of method used to assign, it displays in the Financial Awards tab. To access the Financial Awards tab, first select the appropriate Academic Year and Financial Aid Year on the Financial Status tab, and then click the Awards tab. A list of awards assigned to that student for that particular financial aid year displays. If a student is assigned more than one award package, select the appropriate package from the Filter to Package drop-down list. Awards may be adjusted, deleted if not yet sent to billing, or added via this window. If your institution participates in the Federal Loan program and uses the COD integration functions, COD history for each award may be viewed.

COD Award Headers

Beginning with the 2011 – 2012 Award Year COD started collecting the Ability to Benefit information for Pell, Direct Loans, Perkins, and TEACH for students seeking federal financial aid who did not graduate from high school. Information can be found on the Department of Education website in the 2011-2012 COD Technical Reference document. This PDF document can be found at this URL:

https://www.fsadownload.ed.gov/Repository/CODTechRef1112-Nov/Tech%20Ref%20Sections/1112CODTechRefVol2Sec1ImpGuide.pdf

Ability to Benefit

Ability to Benefit information is maintained on the Financial Aid Maintenance Awards tab using the COD Award Headers.

Ability to Benefit information present in the ISIR file is imported into CAMS via the ISIR Direct functionality located at Tools >Import >Financial Aid or the data may be populated manually.

Financial Award Number

When COD Export is originated, Direct Loans are assigned a Financial Award Number and a COD Financial Award ID. After the COD Export has been initiated, users can change the Financial Award Number for a Direct Loan in the COD Award Header. This will also change the COD Financial Award ID (a system-generated read-only field) to reflect the adjusted Financial Award Number. After you change the Financial Award Number in the COD Award Header, future COD Exports will use the new number and ID.

COD Fees

The Award Header for each COD Award is created automatically when a COD award is manually or automatically created in CAMS. The **Origination Fee Percent** and **Interest Rebate Percent** fields are populated automatically by CAMS using the amounts entered in the Yearly COD Parameter for each award based on the Academic Year and Distribution Date of the award.

The percentages are the fees used in the COD Export and are not changed by CAMS even if the amounts are changed in the Yearly COD Parameter in Award Reference Setup. The fee percentages may be changed manually in the COD Award Header detail, if necessary.

An example for a needed change might be that you manually added an Award Distribution for a specific date with a specific Origination Fee. This will set the COD Header and used for the COD Export. You then add another distribution for an earlier date which has a different Origination Fee in that date's Yearly COD Parameter. The COD Header will remain at fee in the award that was created first and will need to be manually changed to reflect the different fee that both distributions should actually have (the earlier distribution date).

Academic and Financial Aid Year Dates

The COD Export determines the Academic Year and Financial Aid Year date by obtaining that data from Financial Aid >Setup >Yearly Setup. If there is a need to change an award's dates based on a student's enrollment, double-click the COD Award for that award and change those dates in the Academic and Financial Aid Year Begin and End Dates section (for example a student enrolls for the year that includes Fall and Spring terms, then after Fall decides not to return in the Spring). When changing the Academic Year Begin and End Dates, the Weeks in Academic Year field will automatically calculate.

Changes here will override (for the changed award only) the Start and End Dates as set in Yearly Setup when exporting to COD in Tools >Export >Financial Aid >COD Export.

Step-By-Step: Sync COD Award Headers

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Maintenance >Awards** tab.

2. The student who meets the COD Ability to Benefit criteria must have a Financial Status record, ISIR record, and qualifying awards.

Figure 90: COD Award Header

3. Click **Sync Header Records** to populate the **COD Award Header** grid and link the records with the appropriate awards. The COD Award Header records store specific detail information for the overall award regardless of the number of disbursements.

4. Double-click a row in the **COD Award Header** grid to open the detail window for that award header.

Figure 91: COD Award Header detail

5. Populate the appropriate data as defined in the COD Technical Reference document.

6. The Ability to Benefit information will be included in the next COD Export when selecting the Program Year 2012 or later.

COD View Export/Import History

COD Import and Export history for Loans, Awards, and Disbursements can be viewed from the Awards tab. All of the information that is displayed while importing or exporting COD is retained here in an historical view.

Step-By-Step: View COD Export/Import History

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Maintenance >Awards** tab. The **Financial Awards** window opens. It is recommended to view this tab in full screen mode.

2. Highlight an award in the grid, then click **View COD History** to open the **COD Export/Import History Detail** window. The following COD Import and Export information is available:

   - Loan Export and Import history

   - Awards Export and Import history

   - Disbursement Export and Import history

3. The newest import or export information is displayed at the top of the **COD History** grid.

Figure 92: COD History

4. Click **Return** to return to the Awards tab.

Step-By-Step: Manually Assign a Single Award

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Maintenance >Awards** tab. The **Financial Awards** window opens.

2. Select the appropriate **Package** to which the award is going to be assigned. COD Awards added here must be assigned to a Package (Financial Status record). Non-COD awards may be added without linking to a Financial Aid Status record.

3. Right-click on the data grid to access the **Financial Aid Award Detail Entry** form.

Figure 93: Financial Aid Entry window

4. Select the appropriate **Term** (Term-Calendar reference table).

5. The **Distribution Dt.** (date) automatically defaults to today's date. If the Distribution Dt. is not today's date, select the appropriate date from the calendar.

6. Select the appropriate **Award Type** (TransDoc Reference table located at CAMS Manager >Lookup Table Options >Transaction Documents) from the drop-down lists.

7. Enter the **Amount**. The **Dist Amount** field will automatically populate when the Amount field is filled in for non-COD awards. The **Dist Amount** field for COD awards will populate upon adding the COD award.

8. The description automatically fills in when the **Award Type** is selected.

9. Select the **Award Status** such as Pending, Approved, etc. (FINAID Status glossary table).

10. **Reference** is a free form field for an alphanumeric reference code.

11. Select from the drop-down lists the appropriate **Credit Status** and **Codes**.

12. If the Award amount is dependent on the number of registered hours, not the **Packaged** and **Load** value, enter the number of required registered hours.

13. Select **Yes** or **No** to indicate whether the award will display on the student's billing statement, and then select the appropriate date from the calendar to indicate the **Check Signed On** date, if applicable.

14. The **TransID** is used in the PowerFAIDS Import (see page 112) to allow more than one award with the same Award Type and same Term to be imported. Once a TransID is saved it cannot be changed within the user interface.

15. Place a check mark next to **Lock Award** to prevent this award from being modified during packaging. A locked award will display a check mark in the Lock column of the grid. Locked awards may be viewed or modified from Financial Aid Maintenance without unlocking the award.

16. If the award type has been identified in Financial Aid >Setup as a Direct Loan, the Direct Loan section will display. When manually entering an award, the **Origination Fee Amount** and the **Interest Rebate Amount** will calculate based on the percentages listed the award setup and the fields will populate upon saving the Award detail. These amounts can be changed in the **COD Award Header** detail, but the difference between Origination Fee Amount and the Interest Rebate Amount must equal the difference between the full award and the distributed amount.

17. Select the **Campus** to be used for this award. Leave this field blank to use the Campus set in the Registration Status for the Term assigned to this award. The two-digit **Campus Code** as set in the **Campuses** reference table is appended to the **First 6 Characters of OPEID Code** field as set in the COD Export to complete the Enrollment School Code (OPE ID) for the COD Export.

18. The **Student Accepted** field reflects the choice the student made on the portal. It can be changed here anytime by financial aid staff. Once the award has been accepted or declined and submitted from the Student Portal or manually selected here, the student cannot modify the selection in the portal. To allow the student to reselect Accept or Decline from the Student Portal, change this drop-down to the blank selection.

19. The **Payment Period Start Date** must be set for each Package Term in Financial Aid >Setup >Yearly Setup. This date is used in the COD Export to report the correct Payment Period Start Date for each Disbursement. If there is a circumstance where this default date in Yearly Setup needs to be overwritten, the date can also be set for each award individually in Financial Aid >Maintenance >Awards. This date is also used in **Return to Title IV Funds** calculations located at **Tools >Processes >Financial Aid >R2T4**.

20. Click **Add** to save this information, and **Cancel** to exit without saving.

*Note: If this award has a **Yearly Max** and/or number of available **Slots** entered in the Yearly Award Properties page and either field has been exceeded when you click Add an Alert dialog box displays. You can continue to apply the award or cancel.*

Adjusting Financial Aid Awards

While modifying financial aid awards prior to transferring them to the Billing module is preferred, this might not always be possible. For this reason, CAMS allows awards to be adjusted within the Financial Aid module after they have been transferred. CAMS also allows awards to be adjusted within the Billing Module but this is not recommended as it leaves no audit trail.

Adjust Awards in the Financial Aid Module

Step-By-Step: Modify Awards that Have Already Been Transferred to Billing

1. From **CAMS Enterprise Home** page, click **Financial Aid >Maintenance >Awards** to access the Financial Awards list.

2. Double-click the appropriate award from list to open the Financial Award Detail Entry form. Change the award amount. The distribution amount is automatically changed.

3. Click **Update** to save the change. An adjusting entry will be created in the Financial Award form for the audit trail. This adjusting entry can be viewed in the award list by clicking "+" next to the award.

4. The award needs to again be transferred to the Billing module, at which time only the adjusted amount will be transferred. No adjustments are automatically made to any transactions in the Billing module.

Step-By-Step: Delete Awards in Financial Aid After They Have Been Transferred To Billing

1. From **CAMS Enterprise Home** page, click **Financial Aid >Maintenance >Awards** to access the Financial Awards list.

2. Click the award to be deleted, then click **Delete**. The award temporarily disappears from the list. Close the Maintenance >Award window, then reopen to refresh the data. An adjusting entry will be created in the Financial Award form for the audit trail.

3. The deleted award now displays in the award list with a zero amount. This adjusting entry can be viewed in the award list by clicking "+" next to the award. The following comment displays in the Adj Comment field: "Award has been transferred to billing, zeroing out amount instead of removing award."

4. The award needs to again be transferred to the Billing module, so that the change is reflected in the Billing module.

Adjusting Awards within the Billing Module

Step-By-Step: Adjust Award Amounts in the Billing Batch

1. From the **CAMS Enterprise Home** page, click **Billing >Batch.** A list of all batches displays which have not been distributed to the student ledger displays.

2. Double-click the appropriate batch. The Student Batch Transaction list displays.

3. Double-click the appropriate award (batch transaction). The Transaction entry form displays.

4. Enter the adjusted amount and click **Update**. The Student Batch Transaction list appears with the adjusted amount displayed in the award. Currently, if the award amount is adjusted in the Billing Batch, no record of the change is reflected in Financial Aid. (No audit trail is maintained.)

Step-By-Step: Delete Awards in the Billing Batch

1. From the **CAMS Enterprise Home** page, click **Billing >Batch**. A list of all batches displays which have NOT been distributed to the student ledger displays.

2. Double-click the appropriate batch. The Student Batch Transaction list displays.

3. Click the appropriate award (batch transaction), then click **Delete**. A message displays requesting confirmation of the deletion, click **Yes**. The award is removed from the batch, and is "unmarked" from billing, meaning that it no longer shows as being transferred and can be transferred again when ready. The following comment displays in the AdjComment field of the award in the Financial Award form: "Unmarked from Billing Batch…"

Step-By-Step: Delete (Void) Awards in Billing Ledger

1. From the **CAMS Enterprise Home** page, click **Billing >Maintenance**. The Student Billing Ledger for the selected student opens.

2. Click the appropriate transaction and click **Void**. The Enter Void Transaction form displays the selected transaction.

3. Enter the void reason, then click **Void**. A message displays to inquire whether you want to update the database immediately. Click **Yes**, unless you would rather update later. The transaction in the Student Billing Ledger is marked as voided. If the transaction was previously posted, an adjusting transaction is created in the ledger. The following comment displays in the AdjComment field of the award in the Financial Award form: "Adjusting entry created out of billing due to voided transaction", and the award reflects a "zero" amount.

Remove No Show Awards

For those students who have awards assigned for a specific term, but do not have any academic records (either have not registered, or registered and dropped out or completely withdrew), CAMS provides a quick and easy process to remove awards that have not been sent to billing, or adjust awards that have been sent to billing to zero amounts.

Step-By-Step: Remove Awards from No-Show Students

1. From the **CAMS Enterprise Home** page, click **Tools >Processes >Financial Aid >No Show Remove** and select a **Term**.

Figure 94: Remove No Show Awards window

2. Select either **Official** or **Unofficial** (or both by selecting each one) in the **Does not have any academic records that are** field. CAMS looks at the Student's transcript maintenance record (SRAcademic table) to see if course records exist for either official or unofficial registration.

3. If applicable, select grades to exclude from the **If student has academic records exclude the following grades (for example W)** field. This would then allow students with a course record with the specified grade to be included on the removal list, even though the course record does exist.

4. Click **Initiate**. If no course records are found for the selected term, but awards have been applied to student records, then those students' names display on the Awards tab in **the No show awards for removal** data grid.

5. If a student displays on this list that should NOT have the awards removed (for example someone with a late start), then highlight the appropriate record and click **Delete**. This will ONLY remove the student from the award removal list, and will not delete the awards assigned to that student.

6. If desired, click **Report** to print a report that displays which students and awards are about to be removed.

7. Click the **Process** tab, and then click **Process** to remove awards from the students listed in the **No show awards for removal data grid** on the Awards tab. Awards that have NOT been sent to Billing will be completely removed from the student's record, and those awards that have been sent to Billing or exported to COD will have the amount adjusted to zero so that the zero amount can be sent to Billing or exported to COD.

Work Study

Work Study allows the institution to keep track of jobs, hours, and salaries for those students who are assigned to the program. It's ease of set up and use can quickly provide necessary information to ensure that students receive accurate credit.

Work Study Setup

There are several glossary tables that need to be populated before you can assign work study to students.

- **FINWSJobs** – Enter all jobs that are available for work study participants. Detail about the jobs will be set up later.

- **FINWSPayFreq** – These values will determine how often payment is dispersed, i.e. Weekly, Bi-weekly, etc.

- **FINWSPayUnit** – This table is the payment rate, such as Hourly, Daily, etc.

- **FINWSStatus** – This table is the status of the job, for example Open, Closed, Filled, etc.

The **Workstudy Setup** page must be completed in order to determine how Jobs, Workers, and Time Sheets will be created. There are three sections to this area:

- **Jobs Setup**: Allows for specific requirements to be configured, such as doc tracking and award info.

- **Workers Setup**: This configures the actions associated with creating a worker.

- **Time Sheet Setup**: This configures the actions associated with creating a timesheet.

Note: Jobs must be created before workers can be assigned correctly. Changes made to existing jobs must be updated and the record closed before the changes will be applied.

Step-By-Step: Populating Workstudy Setup

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Setup >Workstudy Setup.** The Workstudy Setup window opens.

Figure 95: Workstudy Setup window

2. In the **Jobs Setup** section, choose the items that are required by your institution.

   a. **Max Units Allowed Required** – will make this field required on the Jobs setup detail window.

   b. **Max Amount Allowed Required** – will make this field required.

   c. **Award Type Required** – will force the selection of an Award Type for a job. Students cannot be assigned to a job until Awards are linked to the job if this option is enabled.

   d. **Document Tracking Sequence Required (Not tied to Fin Aid Package)** – will force the selection of a document group in the Document Group (Not tied to Fin Aid Package) drop-down.

   e. **Document Tracking Sequence Required (Tied to Fin Aid Package)** – will force the selection of a document group in the Document Group (Tied to Fin Aid Package) drop-down.

3. In the **Workers Setup** section, choose the items that are required by your institution.

   a. **Allow Job Override** – enable this to allow CAMS users to override the Pay Unit, Pay Rate, Max Units Allowed, and Max Amount Allowed fields for individual students in the Job detail.

   b. **Worker Record Can Change Job –** if this is checked, a worker record can be moved from one job to the other. This will cause the current record to be inactivated and a new record to be activated.

   c. **Financial Aid Package Required** – requires the selection of a Financial Aid Package.

   d. **Create Fin Aid Award When Worker Record Is Created** – creates a Financial Aid record for the student upon creation of the worker record

   e. **Existing Fin Aid Award Required When Worker Record Is Created** – requires an existing financial aid award for the student in order for a Worker to be created using them. Note – If this is checked, an award cannot be created (see previous step) at the time the worker record is created – the Award and Financial Aid Status must already exist. It is recommended to use "Financial Aid Package Required" (above) when using this option.

4. In the **Time Sheet Setup** section, choose the items that are required by your institution.

   a. **Start/End Dates Required –** requires that a start/end date be present on the timesheet

   b. **Check Timesheet Overlap (by day) –** if this is checked, multiple timesheets may be entered for the same date

   c. **Check Document Tracking Sequence(s) Complete –** this checks to make sure any Document Tracking Sequences that are required be completed before proceeding

   d. **Update Fin Aid Award Amount –** this, if checked, will result in related financial aid awards updating upon the timesheet being saved

   e. **Disable Mass Add Button –** allows for the mass addition of timesheets to be disabled

Create Work Study Jobs

Once the appropriate tables are populated, jobs can be created.

Step-By-Step: Create Work Study Jobs

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Workstudy >Maintenance.** The Work Study Jobs window opens.
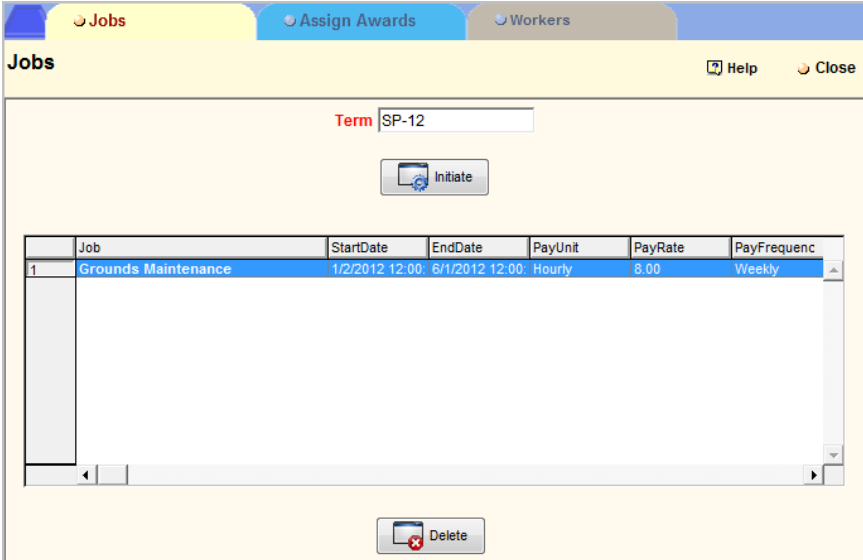
Figure 96: Work Study Jobs window

2. Enter the appropriate Term and click **Initiate**. A list of jobs for the specific term displays.

3. To add a job, right click in the data grid. A blank **Job Details** window is displayed.
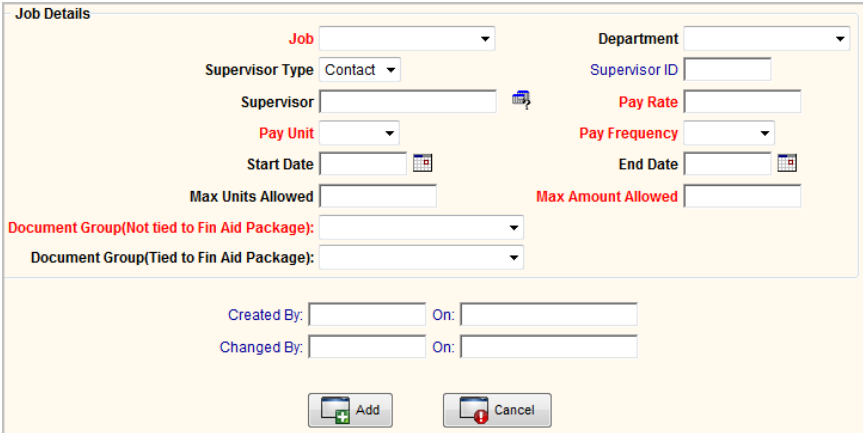
Figure 97: Job Details window

4. Select the **Job** from previously defined **FINWSJobs** Glossary table.

5. Select the **Supervisor Type**, either Contact or Faculty. This field must be selected before you click on the Supervisor search icon. If Contact is selected then the search icon will look in the Contacts table, **Admissions >Contacts**. If Faculty is selected it will look in the faculty table, **Faculty >Maintain**.

6. Select the **Supervisor** using the search icon.

7. Fill in these required fields.

   - **Pay Rate** is the amount per unit the student will receive.

   - **Pay Unit** is how the student accrues pay.

   - **Pay Frequency** is how often the student is paid.

8. Fill in additional fields as necessary.

9. Click **Add** to add the job or **Cancel** to cancel the data entry.

10. Highlight a job in the grid then click the **Assign Awards** tab to link awards to that job. Depending on the requirements assigned in Workstudy Setup, it may be necessary to assign awards to a job before assigning students to the job.

Assign Awards

Awards can be assigned to Jobs. Depending on set up options set as "required" in Workstudy Setup, awards may be automatically assigned to a student upon assigning a job or Financial Aid Status records and awards must already be assigned to students prior to assigning jobs.

Step-By-Step: Assign Award(s) to a Workstudy Job

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Workstudy >Maintenance.** The Work Study Jobs window opens.

2. Enter the appropriate Term and click **Initiate**. A list of jobs for the specific Term displays.

3. Left-click to highlight a Job in the grid, then click the **Assign Awards** tab. Information about the selected Job appears at the top of the tab.

Figure 98: Workstudy Assign Awards

4. Select the Award Type, then click **Add Awards**.

5. If Workstudy Setup has the option "Create Fin Aid Award When Worker is Created" selected, only one award may be assigned to the Job. The award will be assigned to the student upon assignment of the job.

6. If Workstudy Setup has the option "Existing Fin Aid Award Required When Worker Record Is Created" selected, multiple awards may be assigned to jobs. When the job is assigned, the student must have only one award of any of the Award Types linked to the job in their Financial Aid Maintenance for the Financial Aid Package selected when assigning the job.

Assign Students to Work Study

Use the Workers tab to assign students to various jobs.

Step-By-Step: Assign Students To Work Study

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Workstudy >Maintenance.** The Work Study Jobs window opens.

2. Highlight the Job that a student is to be assigned to.

3. Click the **Workers** tab. The student workers window displays.

Figure 99: Student Workers window

The top data grid displays students in the work study system. The bottom grid displays the records of hours worked for a selected student.

4. Right-click in the upper data grid to assign a student to the selected job.

Figure 100: Work Study Job Assignment window

5. Select the student using the Student Lookup icon.

6. The **Active** field is used when the Mass Add feature is used in the Timesheets section.

7. Fill in the **Work Study Status** (Glossary Table: FINWSStatus) and **Notes** fields, if necessary.

8. Click **Add** to add the student or **Cancel** to cancel the data entry.

Create Timesheets

Once a student has been associated with a job timesheets can now be entered.

Step-By-Step: Create Timesheets

1. Highlight the student that the timesheet is to be created for, then right click in the **Timesheet** grid.

2. Enter the **Start** and **End** dates.

3. Enter the number of **Units Worked** and the **Amount Earned** will compute automatically based on Pay Rate previously established for the job.

4. Click **Add** to add the timesheet to the grid or click **Mass Add** to add a timesheet for each student associated with that specific job.

    There are two Work Study reports, **Roster** and **Timesheets**.

Figure 101: Work Study BYOR Criteria window

5. Select criteria fields then click the **Reports** tab.

Figure 102: Work Study BYOR Criteria window

6. Select any necessary reporting dates, select the report and click Print.

Figure 103: Work Study Roster Report

Figure 104: Work Study Time Sheet report

Importing Awards

Although many institutions package awards using CAMS, awards can be imported into CAMS from outside sources, including EDE Award Packages, EDE Awards (not included in a package, PowerFAIDS, and more.

Step-By-Step: Import EDE Awards as a Package

1. From **CAMS Enterprise Home** page, click **Tools > Import > Financial Aid > EDE Awards**. The EDE Awards Import File form opens.

> **Financial Aid Calendar**
> **Academic Year:** 2004-2005   **Financial Aid Year:** FA/SP/SU04
> \\Trs-rl\Import\EDEAWA [Browse...]

Figure 105: EDE Awards Import File window

2. Select the appropriate Academic Year and Financial Aid Year.

Note: For students with existing financial aid status records for the Academic Year selected, the existing status is retained. For those students who do not yet have a status record for that Academic Year, CAMS creates a status record using the Academic and Financial Aid year selected.

3. Click **Browse** to open the Choose File window.

Note: The import file must be located on a share and you must browse to the file through Network Places, even if the file is on the local machine, so that a Universal Naming Convention (UNC) path is listed in the File field. Example: \\MyComputer\MyFolder. It cannot use a drive:\filename format such as C:\importfile.txt.

4. Select the appropriate file and then click **Open**. The file name displays in the File field of the Select Awards Import File form. If this is the correct file, click **OK**. The terms in the calendar year display.

5. Click **Initiate**. CAMS compares the social security numbers, financial aid year, and fund codes of the student records being imported to records in the CAMS database. If a student already has a financial aid status record, CAMS calculates and imports award totals based on the distribution calendar. If a student does not have an existing financial aid status record, then the Terms in Calendar data that corresponds to the Academic and Financial Aid Years selected will be used to calculate the award totals in CAMS. After calculating the total amount to import into CAMS, awards will be distributed according to the term calendar. After CAMS completes these calculations the list of records appears.

Figure 106: Awards Import List window

The top section of the window displays those awards that have matched all the criteria listed in item 5 above and can be imported into CAMS Enterprise. The bottom section of the window displays an exception list of awards that have not met all the criteria and will not be imported.

Note: Fund codes must be the same in the Financial Aid Award reference table.

Figure 107: Award Amounts

The EDETotal column displays the amount that EDE lists the award amount to be. The CAMSAmount column displays any existing amount that CAMS Enterprise has listed for the student for this calendar year. The Amount to Import column displays the amount that CAMS Enterprise will import.

Note: If an award is imported a subsequent time with a different amount CAMS Enterprise will create an additional transaction with an adjustment amount for the award. If the award was originally $500 and subsequently it was now importing as $600, a $100 adjustment transaction will appear for the term and will be imported.

6. Click the **Import** tab to import awards.

Figure 108: EDE Import tab

7. You may define the **Packaged as Load** (Glossary Table: Student Load), **Direct Cost Type** (Glossary Table: FINAID Direct Costs), and **Package Status** (Glossary Table: Packaged Status) for all students for whom a new Financial Aid Status record is being created during the import process. Students with existing Financial Aid Status records will retain their current information and will not be affected by these selections.

8. You may leave the **Import Only Awards with Fund Decision to Accept** field blank to import awards with all fund decisions, or you may highlight the appropriate choice to import only the awards corresponding to that choice. This selection is derived from the Fund Decision field which displays in the EDE Awards Data tab.

*Note: Even if you do not select any Fund Decisions the codes listed in the selection field must be mapped in the **Award Status Mapping** field.*

9. For students for whom a new Award Record is being created, you may apply an Award Status (Glossary Table: FINAID Status), and you must click Yes or No to indicate whether the award total should Show on Billing Statements.

10. Click **Import**. Once awards have been imported, a confirmation message displays. Awards can now be viewed by selecting the student accessing the Financial Aid Maintenance window. Select appropriate academic and financial aid years, then click the Financial Award tab.

If an award is deleted in EDE, CAMS Enterprise will not automatically delete the award. It must be manually deleted from CAMS Enterprise.

Step-By-Step: Import EDE Awards Direct

CAMS Enterprise also provides the ability to import EDE Awards directly to the student's financial aid account without packaging.

1. From **CAMS Enterprise Home** page, click **Tools > Import > Financial Aid > EDE Direct**. The EDE Direct Import form opens.
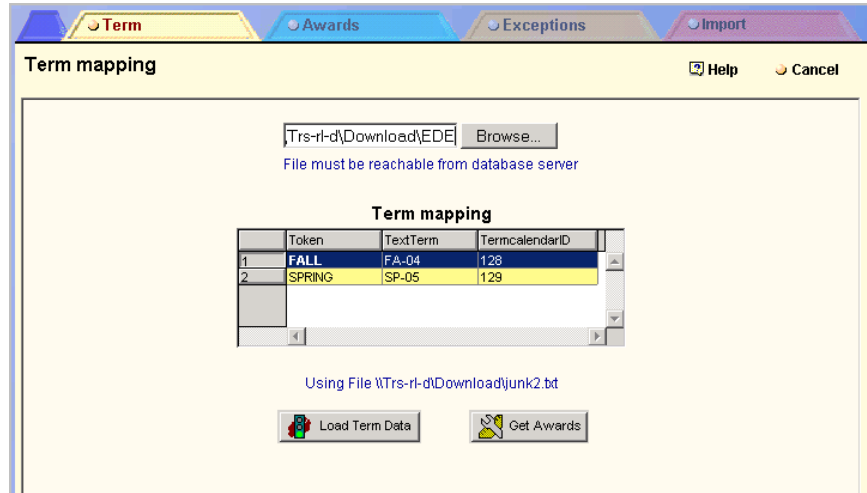
Figure 109: EDE Direct Import window

2. Click **Browse** to open the Choose File window.

Note: The import file must be located on a share and you must browse through Network Neighborhood, even if the file is on the local machine, to the file so that a Universal Naming Convention (UNC) path is listed in the File field. Example: \\MyComputer\MyFolder. It cannot use a drive:\filename format such as C:\importfile.txt.

3. Select the appropriate file and then click **Open**.

The EDE import file does not specify what terms to associate the awards with. You must set the terms to associate the awards. There are two ways to do this.

- Set the PowerFAIDS POE Token field in the Term Calendar setup screen to match the EDE term code. When the **Load Term Data** button is clicked the two terms matching this code will display in the **Term Mapping** data grid.

Note: To use this option the EDE term code will have to be changed to the appropriate term for subsequent imports.

- After the Term Mapping is loaded double click the term in the data grid to change it to the correct term.

Figure 110: Change Import Term

4. Click **Load Term Data** and verify that the terms are correct.

5. Click **Get Awards** to begin the import process. This may take several minutes.

The awards that will be imported are displayed on the Award tab.

Figure 111: Awards to be imported

6. Click the **Exceptions** tab to see awards that will not be imported. Click the **Print** button to print an Exception report.

Figure 112: Awards that will not be imported

Duplicate awards and awards that do not match SSN, PowerFAIDS POE Token, and Fund Code will not be imported into CAMS Enterprise.

7. Click the **Import** tab.
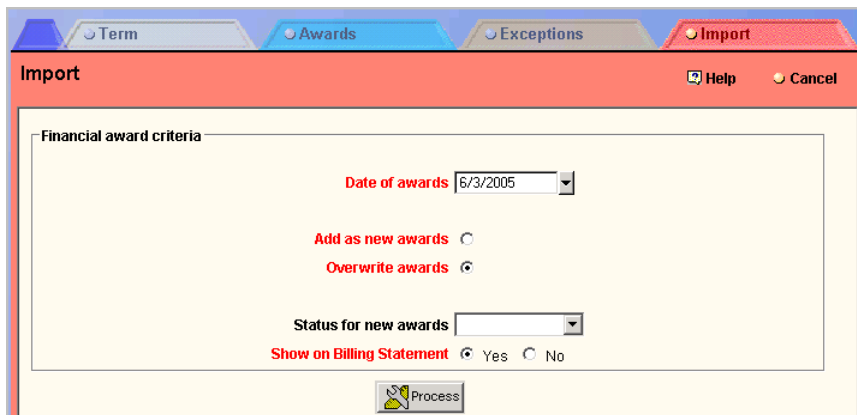
Figure 113: Import Award window

8. Set the **Date of Awards**.

9. Determine if the award should be added as a new award or overwrite the award.

Note: If Overwrite Awards is selected then CAMS Enterprise will determine if the award exists. If it does not then it will be imported as a new award. If it does exist then CAMS Enterprise will determine the difference and import this amount as an adjustment to make the existing award match EDE.

10. Set the **Status for New Awards** and if the awards can be displayed on Billing Statements.

11. Click **Process** to import the awards.

If an award is deleted in EDE, CAMS Enterprise will not automatically delete the award. It must be manually deleted from CAMS Enterprise.

Troubleshooting EDE Awards Import

When an error occurs importing an EDE Awards file there are usually three reasons why this happens.

- Duplicate Entries
- Improper Access Rights
- Incorrect File Layout

When the error occurs you will usually see the error below. This is a generic error and does not actually tell you what the issue is. You should contact your CAMS Manager and have them check the View Error Log to get the specific information needed to resolve this issue.
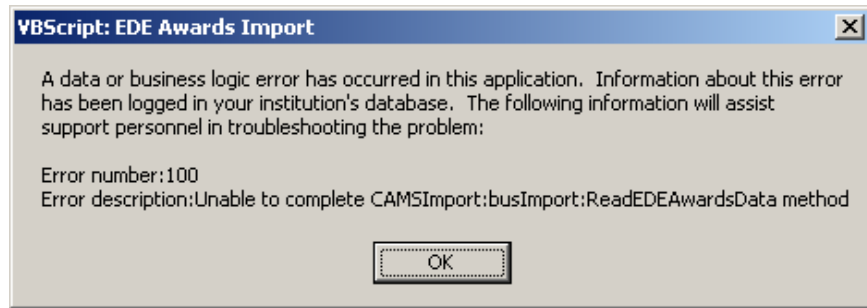
Figure 114: EDE Award Import Errors

This error specifies that more than 1 value was returned. What that signifies is that there is a duplicate award entry for the student. Check the file and resolve any duplicate entries and then retry the import process.
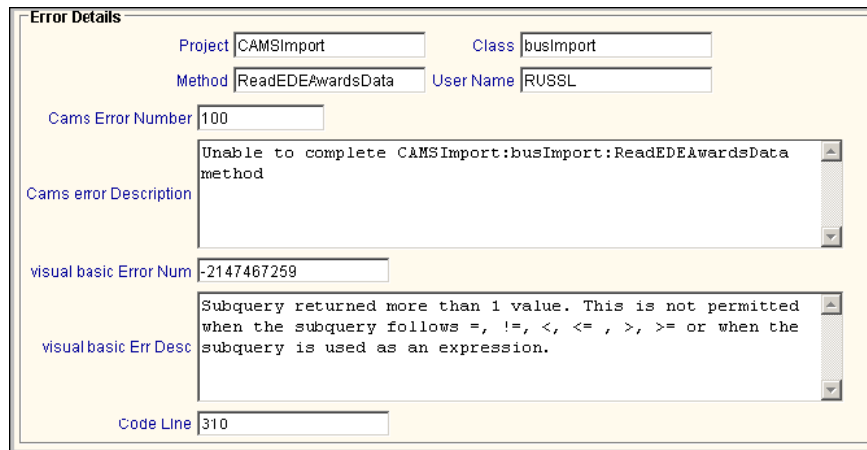
Figure 115: Duplicate Entries

This error specifies that the SQL server does not have read rights to the file. It is always recommended that the file be placed either directly on the SQL server in a shared directory or on the IIS server in a shared directory that is in the same domain as the SQL server. Check the file rights and then retry the import process.

Figure 116: Improper Access Rights

This error specifies that the file is not configured correctly. There could be extra characters, lines or some other issue. There could also be a change in the setup of CAMS Enterprise which now does not match what is in the file. Check the file or CAMS Enterprise setup for errors and then retry the import process.

Figure 117: Incorrect File Layout

Step-By-Step: Import PowerFAIDS Awards

1. From **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >PowerFAIDS**. The **PowerFAIDS Import** form opens.

Read Awards   ? Help ✖ Close

[_____] [Browse...]

File must in a sharable directory reachable from the database server

[🖥️ Initiate]

Figure 118: PowerFAIDS Import File Criteria tab

2. Click **Browse** to open the **Choose File to Upload** window.

Note: The import file must be located on a share and you must browse through Network Neighborhood, even if the file is on the local machine, to the file so that a Universal Naming Convention (UNC) path is listed in the File field. Example: \\MyComputer\MyFolder. It cannot use a drive:\filename format such as C:\importfile.txt

3. Select the appropriate file and then click **Open**.

4. Click **Initiate**. CAMS compares the social security numbers, fund codes (assigned to awards in Financial Aid >Setup >Award Reference), and POE Token (assigned to terms in CAMS Manager >Lookup Table Options >Term Calendar) of the student records being imported to records in the CAMS database. The list of records appears.

Awards   ? Help ✖ Close

Awards to Import

	LastName	FirstName	StudentSSN	FundCode	POEToken	Transdate	StudentUID	CamsI
1	CARDO	JERRY	777-99-1111	DL SUB	21	2/8/2012 12:00:	100,626	Cardo
2	CARDO	JERRY	777-99-1111	DL UNSUB	21	2/8/2012 12:00:	100,626	Cardo

Exceptions

	LastName	FirstName	StudentSSN	FundCode	POEToken	Transdate	StudentUID	CamsI
1	HART	TIM	777-99-1114	DL SUB	20	2/8/2012 12:00:	[NULL]	[NULL]
2	HART	TIM	777-99-1114	DL UNSUB	20	2/8/2012 12:00:	[NULL]	[NULL]
3	HESS	SHARON	777-99-1115	DL SUB2	21	2/8/2012 12:00:	[NULL]	[NULL]
4	HESS	SHARON	777-99-1115	DL UNSUB	21	2/8/2012 12:00:	[NULL]	[NULL]
5	JAMES	FRANKLIN	777-99-1112	DL UNSUB	21	2/8/2012 12:00:	[NULL]	[NULL]
6	KOEMAN	MARVIN	777-99-1118	DL SUB	20	2/8/2012 12:00:	[NULL]	[NULL]
7	LONG	BILLY	777-99-1117	DL UNSUB	20	2/8/2012 12:00:	[NULL]	[NULL]
8	MORGAN	BEVERLY	777-99-1113	DL UNSUB	21	2/8/2012 12:00:	[NULL]	[NULL]

Students matched by SSN. Awards by FundCode. Terms by POEToken. Up to 2 additional fields may be used to match on TransID.

[🖨️ Print]

Figure 119: PowerFAIDS Awards window

5. The top data grid of the window displays those awards that have matched all the criteria listed in item 4 above and can be imported into CAMS Enterprise. The bottom section of the window displays an exception list of awards that have not met all the criteria and will not be imported.

Awards to Import

	AwardType	Termcalendar	AwardTypeID	PowerfaidsA	TransID	CAMSTotal	AmountToImp
1	SubLoan	185	179	$2,239.00		$0.00	$2,239.00
2	Stafford Unsub	185	168	$2,985.00		$0.00	$2,985.00

Figure 120: PowerFAIDS Award Amounts

6. In the top data grid, scroll all the way to the right to view the following fields:

- **PowerfaidsA** field lists the amount that PowerFAIDS is awarding.

- **CAMSTotal** is the total amount already existing in CAMS Enterprise for this term.

- **AmountToImport** field is the amount CAMS Enterprise will import as a separate transaction.

7. The Print button below the data grid will display an exception report, which can be used to analyze those awards that did not import.

PowerfaidsName	CamsName	FundCode	AwardType	POEToken	Term
HART, TIM	**Missing**	DL UNSUB	Stafford Unsub	20	SP-12
HART, TIM	**Missing**	DL SUB	SubLoan	20	SP-12
HESS, SHARON	**Missing**	DL SUB2	**Missing**	21	WI-25
HESS, SHARON	**Missing**	DL UNSUB	Stafford Unsub	21	WI-25
JAMES, FRANKLIN	**Missing**	DL UNSUB	Stafford Unsub	21	WI-25
KOEMAN, MARVIN	**Missing**	DL SUB	SubLoan	20	SP-12
LONG, BILLY	**Missing**	DL UNSUB	Stafford Unsub	20	SP-12
MORGAN, BEVERLY	**Missing**	DL UNSUB	Stafford Unsub	21	WI-25
TRUNE, MARILYN	**Missing**	DL UNSUB	Stafford Unsub	21	WI-25
TRUNE, MARILYN	**Missing**	DL SUB	SubLoan	21	WI-25

Figure 121: PowerFAIDS Exception Report

Note: If an award is imported a subsequent time with a different amount CAMS Enterprise will create an additional transaction with an adjustment amount for the award. If the award was originally $500 and subsequently it is now importing as $600, a $100 adjustment transaction will appear for the term. CAMS will NOT import awards more than once if the award amount has not changed.

8. Click the **Import** tab. The **Import Awards** form displays.

Figure 122: PowerFAIDS Import tab

9. Select the **Academic Year** and **Financial Aid Year** for the imported awards. This determines the Origination Fee Percent and Interest Rebate Percent for DLSUB, DLUNSUB, and DLPLUS COD Award Types as set in Financial Aid >Setup >Award Reference.

10. Select **Yes** to **Show Awards on Billing Statement (Pending AID)**. This value overwrites the designation in Financial Aid >Setup >Award Reference table. For example, if **No** is selected here, then all awards imported in this process will NOT show on a billing statement, even if the designation in the award reference table is set to Yes.

11. Select whether the **Award Status Determination** is **Manual** or whether it will be **Determined by Awards Reference Table**. If the Manual option is selected then values for the **Award Status, Credit Status, Code 1** and **Code 2** fields can be determined here. If **Determined by Awards Reference Table** is selected, then the values for the Award Status, Credit Status, Code 1, and Code 2 fields will be set based on the default values in those fields for each award in the Award Reference table.

12. Select the appropriate value for the **Update Awards Flags (statuses/showonstatement) On** field. This determines which award status values will be updated based on the Award Status Determination if Manual is selected. Available values are as follows:

    - **All Awards** Even awards for which no amount will be imported will have statuses changed based on these selections.

    - **Inserts/Updates** Only new awards and awards which will have an adjusting amount imported will have statuses defined or changed based on these selections.

    - **Inserts Only** Only NEW awards will have statuses defined based on these selections. Existing awards for which adjusting amounts will be imported will retain the statuses defined during the original import.

13. Click **Import**. CAMS imports new awards and adjusting amounts on existing awards according to the specifications defined for the import process.

14. For COD awards, the Origination Fee Amount and Interest Rebate Amount will be calculated based on the amounts entered in Award Reference for the selected Academic year. A Financial Aid Status record will be created and linked to any new awards imported based on the set up in Financial Aid >Setup >Yearly Setup for the Academic Year and Financial Aid Year selected.

15. During re-import, if a different Academic Year and/or Financial Aid Year is selected other than what was selected during the original import a pop-up displays indicating this.
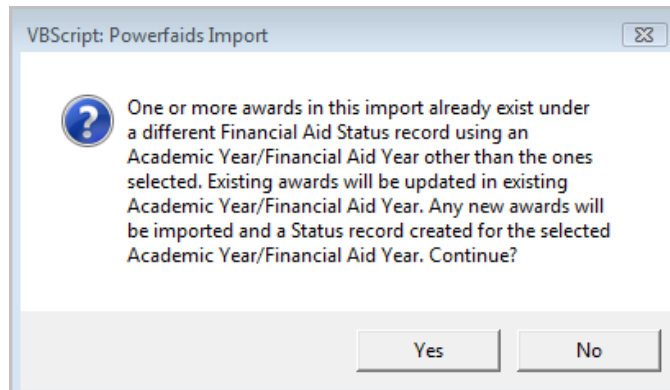
Figure 123: PowerFAIDS pop-up

16. Click **Yes** to import any new awards using the Academic Year/Financial Aid Year selected and update any previously imported awards without changing their Academic Year/Financial Aid Year. Click **No** to cancel the import then select a different Academic Year/Financial Aid Year.

Note: If an award is deleted in PowerFAIDS CAMS Enterprise will not automatically delete the award. It must be manually deleted from CAMS Enterprise.

PowerFAIDS Import File Layout

The import file layout is a comma delimited text file with the following fields in

The following order:

- SSN

- First Name

- Last Name

- EDE/PowerFAIDS Fund Code (in Award Reference Setup)

- POE Token (in Term Calendar, which determines what term to bring in the award.)

- Date of the Award

- Amount

Note: *Up to two additional, optional fields with a maximum of 50 characters total combined may be used after* ***Amount*** *to match awards. These fields are recorded in the Award TransID field in Financial Aid Maintenance. Typically these fields will be used for the CommonLine unique identifier and disbursement number.*

Export PowerFAIDS Student Data

CAMS Enterprise can export selected student data into a file that is compatible with PowerFAIDS™ importing. The exported text file is designed to PowerFAIDS External Update Flat File Format (Rev 8.2).

Unit4 Education Solutions, Inc. cannot detail the steps for importing the text file into PowerFAIDS™. Refer to the PowerFAIDS™ documentation.

Step-By-Step: Export PowerFAIDS™ Student Data

1. From the **CAMS Enterprise Home** page, click **Tools >Export >Financial Aid >PowerFAIDS**. The **Export To PowerFAIDS** window opens.

Figure 124: Export To PowerFAIDS window

2. Enter the **Export Term**. The student must have a Status record for this term.

3. Select either **Student SSN** or **Student ID**.

4. Select the **Type of student**. If **Returning** is selected then the SAT and ACT fields do not display or export. If **New** is selected then you must enter the SAT and ACT data. Specify the test to be used for the SAT Test and the fields used for the SAT Verbal and Math scores. Specify the ACT Test and Composite field.

Note: A Returning student is any student that has a status record from a previous term.

5. If more than one SAT or ACT test is entered for the student, the highest score will be used. Students that do not have these tests will not be exported.

6. If necessary, select Graduate for **Graduate GPA Groups**. This does not pull only students with the Graduate GPA Group but specifies these students as Graduate students in the export.

7. Select the **Address type to export**.

8. Click **Initiate**.
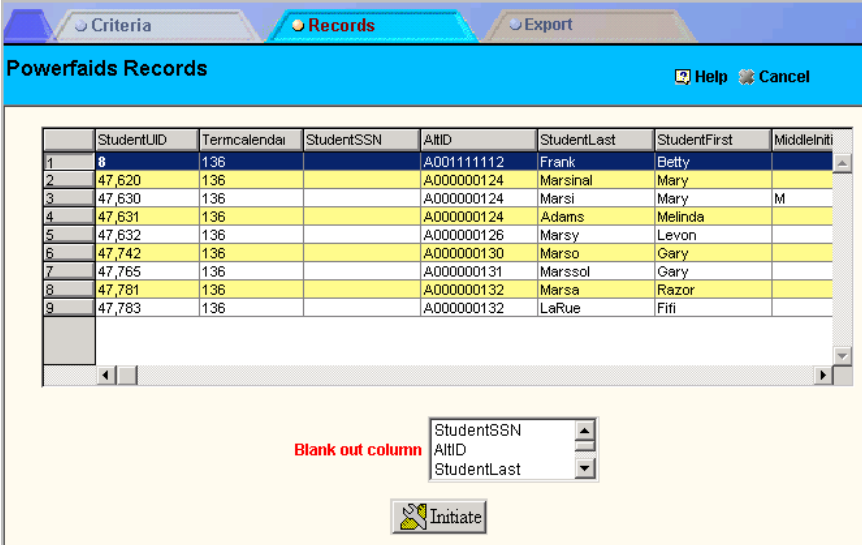
Figure 125: PowerFAIDS Export Records window

Records that meet the selected criteria display.

Columns not required for the export can be deleted. Use the Blank out column list. Select one or more columns to delete and click Initiate.

9. Click the **Export** tab and click **Export** to create the export text file.
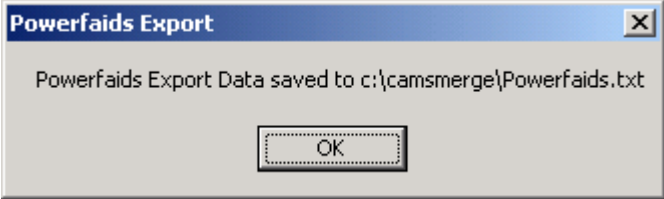
Figure 126: Successful Export

10. Click **OK**.

Powerfaids.txt

CAMS Enterprise exports the following fields to PowerFaids.txt:

Data Element Description	Mnemonic	Start Position
Student SSN	SSNO	1
Student ID	ID-ALT	10
Last Name	NAME-L	20
First Name	NAME-F	36
Middle Initial	NAME-M	47
Address 1	STREET-P1	48
Address 2	STREET-P2	78
City	CITY-P	108
State	STATE-P	125
Country	P-COUNTRY	127
Zip	ZIP-P	142
Housing[1]	F-HOUSING	334
Admissions Status[2]	ADMSTAT	341
High School GPA	GPA-HS	346
College GPA	GPA-COL	349
SAT Verbal	SAT-V	352
SAT Math	SAT-M	354
ACT Composite	ACT-COMP	356
Transfer Student[3]	TRANSFER	377
Degree[4]	USER DEFINED	1443
GPA Group	USER DEFINED	1481
CUM Attempt Hours	USER DEFINED	1509
CUM Earned Hours	USER DEFINED	1597
Major	USER DEFINED	1641

- Housing is set to "1" if the student has a housing record for the selected term and "2" if they do not.
- Admission Status is determined from the student's Applicant Status field on their admission's record and what is defined for that item in the **Prospect/Applicant Status** reference table **UserDefined** column.
- Transfer Student is set to "Y"es if a student has at least one transfer class in their record.
- Uses Large String 3 and displays the first five characters of the student's degree.

Note: Use WordPad to display PowerFAIDS.txt, as Notepad truncates the blank fields.

Loan Log/Exit Interview

Loan Log

Use the Financial Aid Loan Log to track Financial Aid Loans for a particular student. You can keep a summary of loans throughout the student's career. For instance, you may wish to have a summary of a particular federal loan the student received so that it can be tracked for repayment.

Step-By-Step: Add a Financial Aid Loan to the Log

1. From **CAMS Enterprise Home** page, click **Financial Aid >Loan Log/Exit Interview.** The Loan Log/Exit Interview window opens. The Loan Log tab displays.

2. Right-click on the data grid to add a new loan. The Loan Log Detail window displays.

Figure 127: Loan Log Detail window

3. Click the Select icon next to the Lender Name field to access a lender selection window.

4. Complete the optional information such as program name, financial aid year, award type, etc.

5. Click **Add** to save this information, or **Cancel** to exit without saving.

Exit Interview

Use the Financial Aid Exit Interview to track student spouse information, enrollment terms, reason for exit, etc.

Step-By-Step: Add Exit Interview Information to a Record

1. From **CAMS Enterprise Home** page, click **Financial Aid >Loan Log/Exit Interview.** The Loan Log/Exit Interview window opens. The Loan Log tab displays. Click the **Exit Interview** tab.

Figure 128: Exit Interview window

2. Complete applicable information.
3. Click **Add** to save this information, or **Cancel** to exit without saving.

Exit Interview References

Use the Financial Aid Exit Interview References to track references for a student.

Step-By-Step: Add Exit Interview References to a Record

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Loan Log/Exit Interview.** The Loan Log/Exit Interview window opens. Click the **Exit Interview Ref** tab.

Figure 129: Exit Interview Reference window

2. Complete the name of the reference, along with any additional applicable information.

3. Click **Add** to save this information, or **Cancel** to exit without saving.

Financial Aid Reports

The Financial Aid module offers many reporting capabilities, including the following:

- Award Letters
- BYOR
- Loan Log BYOR
- FISAP
- Document Tracking (Please refer to the Getting Started document for detailed information on Document Tracking reports.)

Please refer to online help from within CAMS Enterprise for each specific report.

Financial Aid BYOR

Financial Aid BYOR reports allow you to select both report criteria and student criteria to generate reports containing the exact data you need.

Step-By-Step: Create Financial Aid Reports

1. From the **CAMS Enterprise Home** page, click **Financial Aid >Report >BYOR.**
2. Financial Aid BYOR reports require either the Academic and Financial Aid years, or the Term To and Term From.
3. You can narrow the report output by selecting criteria from the Financial Aid Reports Criteria page.
4. You can further narrow the report output by selecting criteria from the Student Criteria page.
5. Once all criteria have been selected, click the Reports tab.
6. Click the **User Defined Criteria** button to open selection detail for any User Defined items that have been set up for your institutions use in the Financial Aid Maintenance window. Click **Return** to return to the Reports tab.
7. Select the report format. Some of the formats available include, but are not limited to, the following:

   - Detail by Award Type
   - Detail by Student
   - Summary by Award Type
   - Summary by Student
   - Labels
   - Financial Aid Ledger

8. Click **Print** to generate the report, which will display in your report viewer.

Note: For Summary by Award Type report to display Yearly Max and calculate the Available amount, you must use Academic Year and Financial Aid Year criteria as these columns are tied to specific Academic and Financial Aid years.

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