

# Financial Aid System

# FAM Student Data Maintenance (Student Tabs)

#### ©SBCTC-IT

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## 1 Overview

The Student Data Maintenance pages are used to maintain student information. This guide describes how to add, update, and delete student data. It also provides a reference for error messages.

Several programs are used to add and maintain student data. Many pages are updated by other processes. For example, the Award Data page may be updated by the automated packaging process (FAM610), the Tracking Data page may be updated by the automated tracking process (FAM057), and the Academic Data page may be updated by one of the academic update processes (ex: SM9109J). However, you always have the option to go to a page and enter any student data you wish.

The student data maintenance pages consist of the following types of data:

- Student demographic
- Award
- Financial Aid (ISIR data)
- Academic
- Tracking
- Alternate address

- Comment
- Activity code
- PLUS Borrowers
- Loan history
- Clock hours
- ISIR
- **Note**: To access the student data maintenance pages, use the Student Access Bar, located below the main menu at the top of each page, as described in the following chapter.

Main Menu	Regent Enterpr Financial Aid Manage	<b>'ise</b> " ement System	Current Role: 160 FAS Directors
	Application Setup Stud	ent Pell/Loan Processing Work Study	Award Processing ISIR Processing Reports Custom Applications
Student Access Bar	Student ID: 555555555	SMITH, JAMES A	Session From: 68 Find Session To: 68
	Selected Year	Funds Management 🛛 💥	Outcomes 💥 To Do List 💥
	2008-2009 🗸	0.00 0.25 0.50 0.75 1.00	Total Enrollment 4,896 5,246 Tasks Due
			Percentage receiving aid 79.4% 80.1% Enter To Do Items Here
	Processing		grant 34.6% 34.9% Events Due
	Last Year This Year		Liters To Do Items Here

This page inserted for back-to-back printing.

## 2 Accessing the Student Data Maintenance Pages

To access the Student Data Maintenance pages, complete the following steps:

1. In the Student ID field on the Student Access Bar type the student's SSN, then press the Enter key or click the Find button.

Regent Enterpri Financial Aid Manager	Se <sup>°</sup> nent System	Time remaining 02:59:55 [Logout ] Current Role: 160 FAS Directors V
Application Setup Student	Pell/Loan Processing Work Study	Award Processing ISIR Processing Reports Custom Applications
Student ID:	B Lookup icon	Session From: 68 Find - Find Button
Selected Year	Funds Management	🐝 Outcomes 🗱 To Do List
2007-2008         Processing         Last Year         Owner         Ow	Pell Grant	Total Enrollment4,8965,246TasksPercentage receiving aid grant79,4%80,1%Enter To Do Items HerePercentage receiving Pell grant34,6%32,4%Enter To Do Items HerePercentage w/ meit grant34,5%32,4%Enter To Do Items HerePercentage need based Percentage w/ meit grant79,4%80,1%Reference WebsitesPercentage w/ meit grant34,5%32,4%Reference WebsitesDiscourt Rate05,0606,07GentFederal Student Aid HandbookPefault Rates05,0606,07Federal Student Aid HandbookAdministration05,0606,07NSLDS LogonGuarantee AgencyELM Resources12,8580TBDStudents per staff member Cost per reopient565,27S2,2%FISAP50%76%76,97Students admin565,27,98%FISAP

By clicking the Lookup icon a located to the right of the Student ID field, you can use the FAM Name Lookup window to search for a student by Last Name, First Name, by SSN, and/or by Alternate ID. When you click the Search button on the FAM Name Lookup window, students who match the criteria<sup>\*</sup> are listed in the window. You can then

click the corresponding student ID number in the Student ID column to insert the ID into the Student ID field in the Student Access Bar. To view the student's records, you must then either press the Enter key or click the Find button.

FAM Name Lookup - Mozilla Firefox				
				☆
FAI	M Name Lookup			
Last Name	Smith			
First Name	James			
SSN				
Alternate ID				
Soundex Search				
	Search			
Student ID Name Type Name Type/Code Name	SSN	Soundex DOB	Address	City
555555555 MSTR DFLT SMITH, J	AMES A 555555555	11/1	1/1969 9909 S 99TH AVE	YAKIMA
("')				
Done				

<sup>\*</sup> Criteria entered can be a minimal amount of characters, such as a partial name or SSN.

The first of the Student Data Maintenance pages, Student Data, is displayed. Besides the Student Data page, there are 10 additional student maintenance pages containing student data.

2. To access the other pages (Award Data, Financial Aid Data, Academic Data, and so on), click the tabs located across the top of the page.

		Re	egent En nancial Aid I	Iterprise Management	t System					Currer	ne remaining ( nt Role: 280	02:58:23 [Log FAS Directors	<mark>.out</mark> ] 3 💙
	App	ication Setup	Student	Pell	Aloan Processin	gVVork St	udy	Award Proces	sing ISIR P	rocessing	Reports	Cus	stom Applications
	Stude	nt ID: 99999	99999	ji ji	llen, Kathy - 9	99999999		Se	ssion From: Session To:	86 86	Find		
Tabs –		Student	Award	Financial Aid	Academic	Tracking	Commer	nt Activity	Plus Borrov	vers Loan His	story Clo	ck Hours	ISIR
							Stude	nt Data 🕑				5	evel Cancel
		⊂ Student IE	) and Name—									20	Cancer
			Stu	dent ID 9999999	99	Alternate ID	999999999	9	DOB 05/1	9/1980 📧			
			Las	t Name Allen		First Name	Kathy	Mic	ldle Name				
			Informa	l Name		Title			Prefix		Suffix		
		Address,	Email and Tel	ephone									
			Addr	ress 175 Moorcr	aft Rd			Address 2					
			Addre	ss 3				Address 4					
				City Chehalis		State WA	<b>8</b>	Zip	98532-917	Coun	try	<b>8</b>	
			Email Addr	ress						Cour	nty	<b>8</b>	
			Pho	ne 1 253942420	10 P	hone 2		Fax					
		- Financial I	Aid Data										
		Gr	rad. Date	101	Stud	lent Status D	v 🍂	State Residence	VVA 👪	Code 0	1 🎒	Session Applied	A121 ෯
		S	ess Rem 0.00		Eli	gible Code	<b>8</b>	Eligible Session	<b>#</b>	Session Start	<b>#</b>	Session End	<b>86</b>
						Hrs/Units 0		Curric Code	<u>a</u>	Code 1	<b>8</b> 6	Code 2	<b>8</b> 8
					H	iah.Sebaal	le	·					

## 3 Student Tab

#### Student Data (FAM501)

Navigation: Student Access Bar → Student Tab

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tudent	Award	Finar	olal Ald	Academic	Tracking	Comment	Activity	Loans	Loan History	Clook Hours	ISIR	
							Student	Data 🕐				
~ Stud	dent ID and	1 Name					[Save]	cancel J				
	s	tudent ID	9999999999	1		Alternate ID	999999999		DOE	01/22/1959	<b>1</b> 22	
	La	ast Name	SMITH JF	۹		First Name	MARK		Middle Name			
	Inform	nal Name				Title			Prefit			Suffix
Add	iress, Emali	and Tele	phone									
		Address	1234 Pine	e Ave NE				Address 2				
		Address 3						Address 4				
		City	Bellevue		Stat	e WA 🏭		Zip	8004	c	ountry	
	Emai	I Address	fasemali	Beboto.edu				_			county	
		Phone 1	425-803-	5555	Phone	2		Fax				
Fina Grad J	ancial Ald D	ata 2012	(c)	Student	44			State WA	<b>A</b>	Institution 01	46	Session B121
Secci	Rem 0.00		File	Status			R	Eligible	 #A ===	Code "		Applied Charles
Curricu	ulum		Misce	ellaneous			Misce	Session	A Misc	ellaneous		Miscellaneous
	Lone D	_~~	ACG	Code 1	~		н	Code 2		Code 3		Code 4
Entra	ance			Reason Hig	gh School Pro	gram		Program		None	<b>M</b>	
Inter	View		E Exit	Date		191						
Abii	ity to nefit Code	<b>#</b>	Adn	ATB ninistrator Code	<b>8</b>			Code	<b>#</b> •	ATB ompletion Date	E	ATB State
Pers	sonal Demo	ographic		. M 48	Resident		VA Code	AL.	VA Sec	A901		
			55	999999999	Marital		Ethnic	0 🏔	Citizer	WA A		
					Handicap	Ale a	ceased Date		E PIN		1	
				Demo	graphic Status	<b>A</b>	Misc Code	*	Misc Nun			
Туре	e, Code Dat	ta										
					me Type MST	R	Name Co	de DFLT	Nam	e Status		
				💹 En	all Type MST	R	Email Co	de DFLT				
				Addre	ss Type MST	R	Address Co	de DFLT	Addres	s Status	8	
				Miscellaneous	s Code 1	<b>B</b> Miscel	aneous Code	: 2	Miscellaneou	Code 3	<b>3</b>	

This chapter describes the following functions within the Student tab:

- Adding a new student
- Updating student master data
- Deleting student master data
- Error messages

The Student Data page is used primarily to add or update student names, mailing addresses, email addresses, telephone numbers, some financial aid data, and demographic data. Make the appropriate changes in the corresponding fields and then click the Save button.

## 3.1 Manually Adding A New Student

Students may be added to the FAM system in either of the following ways:

- Through the **FAFLOAD** process (NED002), where the student's FAFSA data is moved into FAM and the student's demographic data is created (see the *Loading ISIR Applicant Data into FAM* document, available on the SBCTC-IT web site).
- Through the Add New Student process, as described below.

#### To manually add a new student

1. Select Add New Student from the Student drop-down menu at the top of the page.

Appli	cation Setup	Student	Pell/Loan Proc	cessing VVork Stu	dy	Award Proces:	sing ISIR Proce:	ssing Repor	ts	Custom Applications
		Add New Stude	nt da					~		
Studer	nt ID: 9999999	Delete/Change St	udent 🚬 arris, Ch	arles S - 9999999	99	Ses	ssion From:		Find	
		Change Name/Ac	ldr/Email				Session To:	66		L
	Student	Downshift Name	Addr Acader	nic Tracking	Comment	Activity	Plus Borrowers	Loan History	Clock Hours	ISIR
		SAP			Student	t Data 🕐				
		R2T4								Save Cancel
	<ul> <li>Student ID an</li> </ul>	d Name								
		Student ID	9999999999	Atternate ID	9999999999		DOB 05/17/19	69 🔛		
		Last Name	Harris	First Name	Charles	Mide	dle Name S			
		Informal Name		Title			Prefix	Sur	ffix	
	Address, Ema	ail and Telephon	e							
		Address 7	620 Manastash Ro	I		Address 2				
		Address 3				Address 4				
		City E	llensburg	State VVA	<b>3</b> 3	Zip	98926-781	Country	<b>8</b> 6	
		Email Address						County	<b>86</b>	
		Phone 1 3	602492929	Phone 2		Fax				
	Financial Aid	Dote	-		-				_	

The Add A New Student page is displayed.

Re	gent Enterpr ancial Aid Manage	ise ment System				Curre	me remaining 02.59.1 nt Role: 280 FAS [	56 [ <mark>Logout</mark> ] Directors 🐱
Application Setup	Student	Pel/Loan Processing	Work Study	Award Processing	ISIR Processi	ng	Reports	Custom Applications
tudent ID:	86			Session Sessi	Fram: on To:	86 86	Find	_
	Welcome to t	he Insert New Student wi	Add A N tard. This wizard	ew Student 🕐 will help you insert a ner	w student into th	he Finan	cial Aid System.	
		Please p Fi	irst Name	ng information and then				
			DOB SSN		-			
		s	student ID	Next				

- 2. Enter the following student information:
  - First Name (optional)
  - Last Name (optional)
  - DOB (optional)
  - SSN (required)
  - Student ID (optional)
- 3. Once the fields are complete, click the Next button. You will receive a message to "Please wait" while the process searches for possible matches.

4. The Add A New Student page displays a list of potential FAM and SIS students. Students listed in the Potential FAM Student Found section are students who exist in FAM that match the criteria entered.



Students listed in the Potential SIS Student Found section with a name and date of birth are students found in the Student Management System (SMS) on the HP-UX. Students listed in the Potential SIS Student Found section without a name or date of birth are students who do not have a record in SMS.



- 5. Click the appropriate icon to select an existing student in FAM or SIS or student who does not exist in either system.
  - Click the Edit icon 😺 to make changes to a student's record that already exists in FAM.
  - Click the Import icon 🔁 to import a student's information from SMS into FAM or allow entry of a new student's information into FAM.
  - Click the Cancel button to cancel your activity; new student data is not imported into FAM.
- 6. The Student Tab displays.
  - If the student had a record in SMS, their SSN will display in the Student ID field, SMS SID will display in the Alternate ID field, and name, date of birth, Address, City, State Zip Code, Phone Number, Status of SS and Institutional Code of 01 will also be pre-entered. All other fields will be blank.
  - If the student does not have a record in SMS, the SSN entered will populate the Student ID field and the SSN field. The Status of SS and Institutional Code of 01 will also be pre-entered. All other fields will be blank.
  - If the selected student already exists in FAM, their biographic and demographic data will display.

### 3.2 Updating Student Master Data

#### To update student master data

- 1. In the Student Access Bar, complete the Student ID field. Or click the Lookup icon a located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar or press the Enter key.

The Student Data page is displayed, along with the current data on file for the student.



- 4. Edit the data in the fields on the page as necessary. To navigate within the page, either press the Tab key repeatedly to move from field to field, or click within the field you want to edit. Use field-level lookups (the Lookup icon 🏶 located to the right of many of the fields) to find valid data.
- 5. Click the Save button to save your work, or click the Cancel button if you don't want to save your work.

#### Type and Code Data section for Name, Email and Address

More than one name, email and/or address may be recorded for each student. (Note that at least one name is required for each student.) Names, emails and addresses are distinguished by their Type and Code. For example, the name, email or address *types* of FAM or SMS could be used to distinguish if the student's data originated as a FAM student or as a student from the Student Management System (SMS) on the HP-UX. The name, email and address *codes* could be used to distinguish the student's master/default name and mailing address (MSTR), email and address used for home correspondence (HOME), email and address used for work correspondence (WORK), and so on.

To modify a name, email or address, click the Edit icon [2] located to the left of the Name, Email, or Address Type fields. This opens a separate window, where you can add or modify data.





## 3.3 Deleting Student Master Data

You cannot delete students using the Student Data page (FAM501). To delete a student from the database, use the Student Delete/Change Process (FAM003), as described below.

**Note:** Students who have awards with a status code of either '1' or '2' cannot be deleted from the database. Since awards in these two statuses are considered active, the program will not permit a deletion. When a student with awards in these statuses *must* be deleted from the database, you must first change the statuses on the Award Tab before attempting to delete the student.

Student Delete/Change Process 🕐
Failed to Delete.
Cannot delete student with active awards
Student Delete Process is selected.
Existing Student ID 999999999

If some awards in status '1' or '2' are from a prior year session, and that award session is closed for updating, you will not see any open fields to edit data. To reopen a session or session range, go to Application  $\rightarrow$  Setup New Year  $\rightarrow$  Import Session. Click the Edit icon  $\swarrow$  for the applicable session. The FAM Session Code Edit page is displayed:

Award Status = @**AWD** = session is closed Award Status = "blank" = session is open

#### To delete a student from FAM

Student Delete/Change Process (Program ID: FAM003)

**Navigation:** Student  $\rightarrow$  Delete/Change Student

1. From the Student drop-down menu, select the Delete/Change Student option.

ation Setup	Student	Pell/Loan Processing	Work Study	y	Award Processing	ISIR Processing	Repo	rts Custom Application:
ID:	Batch Student Load/Up Add New Student	date	_		Session Fro	om: 🌅		Find
	Delete/Change Stude	ent	-		Session	То: 🧧	3	
ar	Change Name/Addr/Em Downshift Name/Addr	ail Management		*	Outcomes		*	To Do List
2008-2009	9 🔽 SAP	00 0.25 0.5	0 0.75	1.00	Total Enrollment Percentage receiving a	4,896 aid 79.4%	5,246 80.1%	Tasks Enter To Do Items Here
	R2T4				Percentage receiving F grant Percentage w/ merit gr	Pell 34.6% ant 34.5%	34.9% 32.4%	Events
Th	nis Year				New Freshman	1,686	1,446	Enter To Do Items Here
					Percentage need base Percentage w/ merit gr	d 79.4% ant 34.5%	80.1% 32.4%	Reference Websites
					Discount Rate	05-06 34.5%	06-07 32.4%	Regent
	4.247 %				Default Rates	05-06	06-07	IFAP
rded F	Received/Awarded				Perkins FFEL	34.5% 34.5%	32.4% 32.4%	Federal Student Aid Handbool
					Average Indebtedness	\$15,386	\$15,458	Code of Federal Regulations

The Student Delete/Change Process page is displayed:

Original Student ID	
Submt	

- 2. Verify that the Student Delete radio button is selected.
- 3. Enter the student's SSN in the Existing Student ID field.
- 4. Click the Submit button. The Student Delete/Change Process page is displayed. This page lists the number of records found in each different area of the FAM database.

Studen	t Delete/Change Process ?	
Student Dele	ate Process is selected	
	ter roceas is selected.	
	Existing Student ID 999999999	
Table Display Name	No. of records found	
Personal Demographic	1	1 1
Addrose	1	
Electropic Address	1	1
Name	1	
Student	1	1
Activity	0	
Commonto	2	1
L oop Origination	2	
Roll Dichursoment	3	1 1
Pell Origination	2	
Plue Perrower	3	1 1
Academic	0	
Avard Disburgement	30	1
Award Disbursement	20	
Award	49	4
Eining Einen eint Aid	12	
Financial Aid	4	
Mark Authorization	108	
Work Detail	0	4
Colifernia BOOO Date	0	
Lean Llistery Summers	0	4
Loan History Summary	0	
Clearly Lewis Datail	0	4
Clock Hours Detail	U	1
	Belete/Observed	
	Delete/Unange Cancel	
		>

5. To delete all records, click the Delete/Change button. To cancel, click the Cancel button. A separate window appears asking you to confirm the deletion of the student's record:



6. Click the OK button.

**NOTE:** By clicking on the DELETE/CHANGE button on the *Student Delete/Change Process (FAM003)* page, doesn't mean that all detail records will automatically be deleted. If the student being deleted has award detail records in an active status (ex: status '2'), FAM will prevent the record from being deleted and will provide the user with an error message. However, if the student has track detail records, the student will be deleted, but the track detail records may not. Having detail records without a student master record will cause an issue with AG990R (ETL process). AG990R will not be able to load detail records into the SAFERS database on the HP-UX if the student master record is missing.

Please check whether or not there are detail records listed (ex: awards, tracking, financial aid, etc.) and if there is, delete them manually first before deleting the student master record.

### 3.4 Error Messages

The following error messages may be displayed when working on the Student Data page:

#### A student already exists with this ID.

You have attempted to add a student with an ID number that is already on file.

#### No such record exists.

You have attempted to find a student ID that is not in the database.

#### Session start and end must be entered if an eligibility code is specified.

When an Eligibility Code is entered for satisfactory academic progress purposes, you must also complete the Session Start and Session End fields.

#### Session start and session end must both contain values or both must be blank.

You cannot have a Session Start entry without a Session End entry. The fields must either both be completed or they must both be blank.

#### The start semester cannot be after the end semester.

The session entry in the Session Start field occurs after the entry in the Session End field.

This page inserted for back-to-back printing.

## 4 Award Tab

#### Student Award Data (FAM502)

**Navigation:** Student Access Bar  $\rightarrow$  Award Tab

plication Setup	Charles									
	Student	Pel	Loan Processin	g Work S	tudy	Award Processing	) ISIR F	Processing	Reports	Custom Applications
lent ID: 9999999	99 <b>66</b>	MARTINEZ	, EDUARDO E	. 99999999	9	Sessio	on From: Ision To:	<u>86</u> 86	Find	
Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
				B121 B122 B123	FALL 2011 WINTER 2012	4	3350.00 2400.00			
				B121 B122	SUMMER 11 FALL 2011	4	2400.00	0		
				Totals On	y	12	8150.00	5		
				Award	e without E	inancial Aid	Data			
				Awaru	s without P	inancial Alu	Data	16		
			Session	Descriptio	n Em	Award Count	Award To	otal Edit		

This chapter describes the different fields and functions within the Award tab:

- Awarding a student
- Updating an award for a student
- Deleting an award for a student
- Copy Award Data
- Award Data Error Messages

This page is used to add, update, or delete student award data. Award information is listed for each session a student has received financial aid or other financial awards. The award summary page displays two different groups of awards: Awards with Financial Aid (ISIR) Data and Awards without Financial Aid (ISIR) Data.

#### To view awards for a student

- 1. In the Student Access Bar, complete the Student ID field. Or click the Lookup icon located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar.
- 4. Click the Award tab to display the award summary page.

(This page displays a summary of the awards the student has received with or without ISIR data. The awards shown with ISIR data are listed in the "Awards with Financial Aid Data" table and include the session ranges for which they apply. The awards shown without ISIR data are listed in the "Awards without Financial Aid Data" table and are only displayed for sessions in which they apply.)

**Note**: The *FAM Online Help* refers to sessions listed in the "Awards without Financial Aid Data" section as "orphan sessions."

		Awar	ds with Fina	ncial Aid Dat	a (?)			
	Stud	ent ID 9999	99999 MARTINE	Z, EDUARDO E -	9999999999			
	Session R	Range				Edit		
	B121-B125	Session	Description	Award Count	Award Total	122		
		B121	SUMMER 11	4	2400.00			
		B122	FALL 2011	4	3350.00			
		B123	WINTER 2012	4	2400.00	1.		
		Totals Or	ily	12	8150.00			
		Awar	ds without Fi	nancial Aid [	Data			
	Session	Description	on Emr	Award Count	Award Total	Edit		

## 4.1 Adding Awards (FAM502)

Awards may be added manually to a student's record, using either of the procedures described below, or automatically using Automated Packaging (FAM610). See the user guide *FAM Auto Packaging and Packaging Plans*, available on the SBCTC-IT web site, for information about Automated Packaging.

The Activity Date on the Award Data page is updated when a new award is added or the amount is changed. The date will also change if you have the following value entered into the Processing Table:

System: SAF Table ID: AGENCY Value: ACTIVE-AWD-STAT Description: \$ALL to update the Activity Date for ALL award status changes. (Currently, the function to have the Activity Date change for only specific award statuses is not available.)

There are two procedures for manually adding awards to a student's record, depending on whether or not the student has ISIR data loaded into FAM. Each procedure is described below.

# To add an award(s) to a session under the "Awards with Financial Aid Data" section

Awards that fall within a session range that contain ISIR data already loaded into FAM are listed under the "Awards with Financial Aid Data" section on the award summary page.

1. Begin accessing the award data for a student, as described on the first page of the Award Tab section.



2. Click the Edit icon [12] for the session range to which you want to add an award.

ident	Award Fina	ncial Ald	Academic	Tracking	Comment A	ctivity Los	ins Lo	an History 🛛 🤇	Clock Hours	IŝiR			_		
Awar	d Data	_	_	_	_	_	_	_	_	_	_	?			
				Sa	Accept A	wards Packa	ige Cano	2el							
	Stu	dent ID	999999999		Name M	ARTINEZ, ED	UARDO E			SSN 99999	9999				
	Financial Aid	l Range	B121 - B125	В	udget Amount 1	4979.00			Budget	Amount 14979	.00				
	Packag	je Code	9F	Family	Contribution 0	.00			IM Family Co	ntribution 19999	99998.00				
	Institutio	on Code	01		Need Amount 1	4979.00			IM Need	Amount -1999	985019.00				
	P	ell EFC	0	Total /	Active Awards 3	950.00			Total Active	Awards 3950	00				
				Unmet	Need Amount 1	1029.00		IN IN	I Unmet Need	Amount -1999	900909.00			1	
	_											16		Insert Ic	on
Session	Сору То	Award Code	Award Name	Award Status	Amount	Award Sub Code	Activity Date	Misc Code 1	Misc Code 2	Disbursement Amount	Funding Balance	Delete		1	
B121	B125B122B123B1	01 24	PELL GT	2 💙	900.00	<b>A</b>	02/04/2011	~		900.00	26031.00	5			
		02	SEOG GT	2 💙	100.00	<b>8</b>	09/07/2011	×		0	-2700.00	5			
		08	FED WORK	3 🎽	1100.00	<b>A</b>	09/07/2011	~		0	0.00	6			
		09	STATE GT	9 🖌	300.00	<b>8</b>	08/24/2011	×		0	-10755.00	5			
B122	B125 B123 B124	01	PELL GT	2 💙	1850.00	<b>A</b>	08/24/2011	~	×	900.00	6867966.00	5			
		02	SEOG GT	2	100.00	<b>8</b>	09/07/2011	×		0	37565.00	5			
		08	FED WORK	3 💙	1100.00	<b>8</b>	09/07/2011	~	· ·	0	277932.00	5			
		09	STATE GT	9 🎽	300.00	<b>8</b>	08/24/2011	~		•	99895900.00	6			
B123	B125B124	01	PELL GT	2 💙	900.00	<b>A</b>	02/04/2011	~		900.00	550416.00	5			
		02	SEOG GT	2 💙	100.00	<b>8</b>	09/07/2011	~	·	0	37657.00	5			
		08	FED WORK	3 🎽	1100.00	A	09/07/2011	~		0	-5995.00	5			
		09	STATE GT	9 💙	300.00	<b>A</b>	08/24/2011	×	×	0	-20209.00	6			
				Sa	Accept A	wards Packa	age Can	cel							

The Award Data page is displayed.

3. Click the Insert icon **[**] located at the top, right corner of the table on the Award Data page.

A row of empty fields appears at the bottom of the Award Data table. You may enter up to four award codes at a time. To enter more than four, click on the Save & Add More button.

- 4. Complete the fields in the new row. Press the Tab key to move from field to field. Be sure to include the decimal and cents in all award amounts.
- 5. When all fields are complete, click one of the save option buttons at the bottom of the page:
  - Save & Add More: Saves your work and adds another empty row of fields in the Award Data table.
  - Save: Saves your work and continues to display the Award Data page.
  - Cancel: Cancels any entries you added.
- 6. To exit the page, click a different tab or menu item.
  - **Note**: By clicking the Accept Awards button, only awards with status **1** will change to a status **2**.

#### To add an award(s) to a session that does not exist under the "Awards with Financial Aid Data" section

Awards that fall within a session that *does not* contain ISIR data already loaded into FAM are listed under the "Awards without Financial Aid Data" section on the award summary page.

1. Begin accessing the award data for a student, as described on the first page of the Award Tab section.

	Awards without Fi	nancial Aid	Data		Incort Joon
Session	Description	Award Count	Award Total	Edit	Insert Icon
B122	FALL 2011	1	500.00	5	

1. Click the Insert icon **[** located at the top, right corner of the table.

The Award Data page is displayed, with a row of empty fields. (Note that currently you can insert only one award at a time. A future release of FAM will allow you to add more than one award at a time.)

Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
					Award	Data 🕐				
			Stu	udent ID 9999	99999 MORF	ROW, ALEXIS	M - 9999999	99		
					Session	A				
	Award	I Code 🛛 A	ward Status	Amount	Aw	ard Sub Code	e M	isc Code 1	Misc Code 2	
		<b>8</b>	1 🕶		0.0	æ		*	~	
					Save	Cancel				
	Award	Code A	ward Status	Amount	Aw 0.0 Save (	Cancel	e M	ISC Code 1	Misc Code 2	

- 2. Complete the fields in the new row. Press the tab key to move from field to field. Be sure to include the decimal and cents in all award amounts.
- 3. Click the Save button at the bottom of the page. Or click the Cancel button if you decide that you do not want to add an award to the student's record.
- 4. To exit the page, click a different tab or menu item.

### 4.2 Updating an Award for a Student

#### To manually update an award for a student

1. Begin accessing the award data for a student, as described on the first page of the Award Tab section.



1. If the award falls within a range under the Awards With Financial Aid Data section, click the Edit icon 😺 that corresponds to the session range you want to update.

—or—

If the award falls within a session under the Awards Without Financial Aid Data section, click the Edit icon  $\square$  that corresponds to the session you want to update.

The Award Data page is displayed, which contains all award information for the session or session range you selected for the student.

The following screenshots show the Award Data page after clicking the Edit icon i under the Awards With Financial Aid Data section, and alternatively, the Award Data page after clicking the Edit icon i under the Awards Without Financial Aid Data section.

Award	Award Data													
	Financial Pack	Vi	iew of	the Awa "Aw	ard Data p ards with	age after Financia	click al Aid	ing the E Data" so	Edit icon ection	under t	he			
	Institu	ution C	ode 01		Need Amo	unt 9726.00			IM Need A	mount -1999	990272.00			
		Pell E	EFC 0		Total Active Awa	rds 7725.00			Total Active A	Awards 7725.0	00			
				U	Inmet Need Amo	ount 2001.00		IMU	Jnmet Need A	mount -1999	997997.00			
												5		
Session	Сору То	Award Code	Award Name	Award Status	Amount	Award Sub Code	ActNity Date	Misc Code 1	Misc Code 2	Disbursement Amount	Funding Balance	Delete		
B122	B125 B123 B124	01	PELL GT	2 🎽	1750.00	<b>A</b>	10/05/2011	~	>	0	6867966.00	5		
		09	STATE GT	2 🎽	775.00	<b>#</b>	10/05/2011	×	*	0	99895900.00	5		
		1D	SNG DCA	2 🎽	50.00	<u>A</u>	10/05/2011	~	~	0	9889.00	5		
B123	B125 B124	01	PELL GT	2 🎽	1750.00	<b>8</b>	10/05/2011	×	<b>*</b>	0	550416.00	61		
		09	STATE GT	2 💙	775.00	<b>#</b>	10/05/2011	>	*	0	-20209.00	61		
		1D	SNG DCA	2 🎽	50.00	<b>8</b> 6	10/05/2011	<b>×</b>	<b>*</b>	0	9889.00	5		
B124	B125	01	PELL GT	2 💙	1750.00	<b>A</b>	10/05/2011	~	*	0	558076.00	5		
		09	STATE GT	2 💙	775.00	<b>8</b>	10/05/2011	×	<b>~</b>	0	-10351.00	61		
		1D	SNG DCA	2	50.00	<b>A</b>	10/05/2011	~	~	0	9889.00	61		
			-		Save Accep	t Awards Pa	ckage Ca	ancel		-				



- 2. Locate the award to be updated and make the necessary changes. Enter the new data or click the Lookup icon 🏶 to select from a list of valid values. Be sure to include the decimal and cents in all award amounts.
- 3. When all fields are complete and you have updated all necessary information, click the Save button, or click the Cancel button if you do not want to update the award data.
  - Note: If the award session is closed for updating, you will not see any open fields to edit data. To reopen a session or session range, go to Application → Setup New Year → Import Session. Click the Edit icon 😺 for the applicable session. The FAM Session Code Edit page is displayed:

FAM Sessio	n Code Edit 🕄
Session	A892
Description	FALL 08
Begin Date	09/22/2008
End Date	12/10/2008
Start Session	~
Session Hours	12
Date AR Posted	12/02/2009
Misc Code 1	<b>#</b>
Award Status	@AWD
Equivalent Session	A892 🍀
Save & Edit Next Save & Edit Previo	ous Save & Go Back Save Cancel

Award Status = @AWD = session is closed Award Status = "blank" = session is open

#### Example of a closed Session: No open fields to allow updating

t	D: 99999	99999 🔗	ZAPIEI	N, DEANNIE - 99	9999999		Se	ssion From:	<b>3</b> 6	F	ind	
								Session To:	68			
	Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock H	lours	ISIR
	Awa	rd Data										?
			Student IE	999999999		Name	ZAPIEN, DE	ANNIE	SSN	9999999	999	
			Session	A892								
						Package	Cancel					
												<b></b>
	Awaro Code	d Awar Nam	rd Award ne Status	Amount	Award Sub Code	Activity Date	Misc Code 1	Misc Code	2 Disbursen Amount	nent	Funding Balance	Delete
	2	2 TV	NHS 2	500.00		10/19/2011				0	999000.00	
						Package	Cancel					
						Linugo						

### 4.3 Deleting an Award for a Student

It is strongly recommended that when a student refuses an award, the award should not be deleted from the student's record. Instead, the award status code should be changed to the code your institution uses to indicate an inactive award (for example, status 5). The only time an award record should be deleted from a student's record is when the wrong award code was assigned in the first place.

#### To delete an award for a student

- 1. View the awards for the student, as described on the first page of the Award Tab section.
- 2. In the award summary page, locate the session and/or session ranges for the student and then click the Edit icon in the row corresponding to the session to be deleted.

The Award Data page is displayed.

3. For each award you want to delete, click the Delete icon 🖾 in the column at the far right side of the table.

	999999 88		ZAPIEN, DEA	ANNIE - 999	999999			Sea	islon To:	<b>86</b>	Find		
ent	Award Fir	nancial	Ald Acad	lemic T	racking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR		
Awar	d Data					_	_			_			?
					Save	e Accept	Awards Pa	ackage Ca	ancel				
	s	tudent	t ID 9999999	999		Nan	me ZAPIEN,	DEANNIE			SSN 99999	9999	
	Messa	e fi	rom web	onage									1
		5	Shirt	- Cond									4
	2				ant to	dalata? Thi	e action will	dalate thi	c record and	204 corresp	ooding det:	sil records	
	$\checkmark$	, r	are you su	Ire you w	ant to	i delete: Thi	S action will	delete thi	s recora ana	any corresp	onung dec	ali records	
													17
							ж	Cancel					
ACCESSION OF THE OWNER OWNER OF THE OWNER OWNE								Caricor					Job 1
Session								Cancor					lete
Session B122	B125 B123 B124	01	PELL GT	2		1/50.00		10/05/2011		<u> </u>	0	6867966.00	dete
Session B122	B125 B123 B124	01 09	PELL GT STATE GT	2		1/50.00		10/05/2011			0	6867966.00	sete Jõ
Session B122	B125 B123 B124	01 09 1D	PELL GT STATE GT SNG DCA	2		1750.00 775.00 50.00		10/05/2011 10/05/2011 10/05/2011			0	6867966.00 99895900.00 9689.00	
B122	B125 B123 B124	01 09 1D 01	PELL GT STATE GT SNG DCA PELL GT	2 2 2 2 2 2		1750.00 775.00 50.00 1750.00	86.	10/05/2011 10/05/2011 10/05/2011 10/05/2011			0 0 0	6867966.00 99895900.00 9689.00 550416.00	
8122 8123	B125 B123 B124	01 09 1D 01 09	PELL GT STATE GT SNG DCA PELL GT STATE GT	2 2 2 2 2		1750.00 775.00 50.00 1750.00 775.00	86 86 86 86	10/05/2011 10/05/2011 10/05/2011 10/05/2011			0 0 0 0	6367966.00 99895900.00 9689.00 550416.00 -20209.00	
B122 B123	B125 B123 B124 B125 B123 B124 B125 B124	01 09 1D 01 09 1D	PELL GT STATE GT SNG DCA PELL GT STATE GT SNG DCA	2 2 2 2 2 2 2		1750.00 775.00 50.00 1750.00 775.00 50.00	88, 86, 86, 86, 86, 86,	10/05/2011 10/05/2011 10/05/2011 10/05/2011 10/05/2011			0 0 0 0	6387966.00 99895900.00 9889.00 550416.00 -20209.00 9889.00	
B122 B123	B125 B123 B124 B125 B125 B124	01 09 1D 01 09 1D 1D	PELL GT STATE GT SNG DCA PELL GT STATE GT SNG DCA	2 2 2 2 2 2 2		1750.00 775.00 50.00 1750.00 775.00 50.00	88, 88, 88, 88, 88, 88,	10/05/2011 10/05/2011 10/05/2011 10/05/2011 10/05/2011 10/05/2011			0 0 0 0	6387966.00 99895900.00 9689.00 550416.00 -20209.00 9689.00	ज को की की की क
8122 8123 8124	B125 B123 B124 B125 B125 B124 B125 B124 B125 B124	01 09 1D 01 09 1D 01	PELL GT STATE GT SNG DCA PELL GT SNG DCA PELL GT	2 2 2 2 2 2 2 2		1750.00 775.00 50.00 1750.00 775.00 50.00 1750.00	88, 88, 88, 88, 88, 88, 88,	10/05/2011 10/05/2011 10/05/2011 10/05/2011 10/05/2011 10/05/2011			000000000000000000000000000000000000000	6367966.00 99895900.00 9689.00 550416.00 -20209.00 9689.00 556076.00	
B122 B123 B124	B125 B123 B124 B125 B124 B125 B124 B125 B124	01 09 1D 01 09 1D 01 01 09	PELL GT STATE GT SNG DCA PELL GT SNG DCA PELL GT STATE GT	2 2 2 2 2 2 2 2 2 2 2 2 2		1750.00 775.00 1750.00 775.00 50.00 1750.00 1750.00	88, 88, 88, 88, 88, 88, 88, 88,	Concern 1005/2011 1005/2011 1005/2011 1005/2011 1005/2011 1005/2011 1005/2011			0 0 0 0 0 0	6587966.00 99595900.00 9689.00 550416.00 -20209.00 9889.00 558076.00 -10351.00	
B122 B123 B124	B125 B123 B124 B125 B123 B124 B125 B124 B125 B124	01 09 1D 01 09 1D 01 09 1D	PELL GT STATE GT SNG DCA PELL GT STATE GT SNG DCA STATE GT SNG DCA	2 2 2 2 2 2 2 2 2 2 2 2 2		1750.00 775.00 50.00 1750.00 775.00 50.00 1750.00 775.00 50.00	88, 88, 88, 88, 88, 88, 88, 88, 88,	Concercion 1005/2011 1005/2011 1005/2011 1005/2011 1005/2011 1005/2011 1005/2011 1005/2011			0 0 0 0 0 0 0	6887966.00 998895900.00 9889.00 550416.00 -20209.00 9889.00 558076.00 -10351.00 9689.00	

A message is displayed asking you to confirm the deletion:

- 4. Click the OK button to delete the award.
- 5. Repeat steps 1 through 4 to delete additional awards.
- 6. To exit the page, click the Cancel button at the bottom of the page.

### 4.4 Copy Award Data

If you need to manually award a student, simply copy award data from one session to another, as described below:

#### To manually copy award data from one session to another

- 1. View the awards for the student, as described on the first page of the Award Tab section.
- 2. In the award summary page, click the Edit icon 5 for the particular session range you are working with.

Application Setup Student	Pell/Loan Pro	wessing Work Study	Award Processing	ISIR Processing	Reports	Custom Applications									
udent ID: 999999999 🦛	nt ID: 99999999 🛞 ZAPIEN, DEANNIE - 99999999 Session From: 🙃 Find														
udent Award Financial Ald Academic Tracking Comment Activity Loans Loan History Clock Hours ISIR															
Award Data 📀															
		Save Accept Av	wards Package Ca	ancel											
5	Student ID 999999999	Name	ZAPIEN, DEANNIE		SSN 99999	9999									
Financial	Aid Range 8121 - 8125	Budget Amoun	t 9726.00		Budget Amount 9726.0	00									
Pack	age Code 9F	Family Contribution	n 0.00	IM	Family Contribution 19999	99998.00									
Institu	tion Code 01	Need Amoun	t 9726.00	1	M Need Amount -19999	390272.00									
	Pell EFC 0	Total Active Awards	s 2575.00	Tota	al Active Awards 2575.0	00									
		Unmet Need Amoun	t 7151.00	IM Unm	et Need Amount -19999	992847.00									
						<b>1</b>									
Session Copy To	Award Award Code Name Award St	atus Amount Av	ward Sub Code Date	Misc Code 1 Misc	Code 2 Disbursement Amount	Funding Delete									
B122 B125 B123 B124	01 PELL GT 2	1750.00	10/05/2011	~	✓ 0	6867966.00 🔏									
	09 STATE GT 2	775.00	10/05/2011	<b>~</b>	•	99895900.00									
	SNG DCA 2	50.00	10/05/2011	✓	✓ 0	9889.00 🚨									
Copy To Icons		Save Accept A	wards Package Ca	ancel	i										

The Award Data page is displayed:

3. Click the Copy To icon in for the session to which you would like to copy the same award to.

When copying, a warning message is displayed if any award codes exceed the program budget limit. However, the copy will take place.

4. Verify that the award(s) copied are correct. If they are, click the Save button to save the changes. You can then either click the Cancel button to go back to the award summary page, or navigate to another part of FAM by clicking a different tab or making a selection from the main menu:

Application Setup St	tudent	Pel/Loan Process	Ing Work Study	Award Processing	ISIR Processing	Reports	Custom Applications			
Student ID: 999999999	CAPIEN	I, DEANNIE - 99999	9999	Session Sess	I From: 🔗	Find				
Student Awa	Financial Al	d Academic	Tracking Commen	t Activity Loans	Loan History C	lock Hours I SIR				
Award Da	ta						3			
		C	Save Accept Av	vards Package Car	cel )					
	Student ID	999999999	Name	ZAPIEN, DEANNIE		SSN 999999999				
Fir	nancial Aid Range	B121 - B125	Budget Amoun	t 9726.00	Budget	Amount 9726.00				
	Package Code	91-	Family Contribution	1 0.00	IM Family C	ontribution 1999999998.0	0			
	Pell EFC	0	Total Active Awards	5150.00	Total Active	e Awards 5150.00	~			
			Unmet Need Amoun	t 4576.00	IM Unmet Need Amount -1999995422.00					
							13			
Session Copy	y To Award A Code N	ward Award Jame Status	Amount 4	ward Sub Code Date	Misc Code Misc Code 1	Disbursement Funding Amount Balance	Delete			
B122 B125	B123 B124 01	PELL GT 2	1750.00	10/05/2011		0 686796	6.00 🔎			
	09 S	TATE GT 2	775.00	<b>36</b> 10/05/2011		0 9989590	0.00 🔚			
	1D 8	NG DCA 2	50.00	10/05/2011		0 988	9.00			
B123 B125	B124 01	PELL GT 2	1750.00	<b>36</b> 10/20/2011		0 55041	6.00 🔎			
	09 S	TATE GT 2	775.00	10/20/2011		0 -2020	9.00			
	1D S	NG DCA 2	50.00	<b>36</b> 10/20/2011		0 988	9.00 🖾 00.e			
		1	Save Accept Av	vards Package Can	icel					
Sa	ave Button					Cancel But	tton			

#### 4.5 Award Data Error Messages

The following error messages may be displayed when working on the student Award Tab:

#### Awards exceed budget

This warning message indicates that the total of awards given to the student exceed the student's budget as shown in the Budget field. You may go ahead and post the awards to the student's record even though the budget is exceeded, or go back and make changes to the student's award data until the message is no longer displayed.

**Note**: Awards with a BA (Budget Applicable) matching status will not cause the "Awards exceed need" message to appear, even when the total awards exceed the student's need. BA matching status awards are budget applicable but not need applicable.

#### Awards exceed need

This is a warning message to inform you that the total of awards given to the student exceeds the student's need as shown in the Need field. You may go ahead and post the awards to the student's record even though his need is exceeded, or go back and make changes to the student's award data until the message is no longer displayed.

#### No FAF on file

This is a warning message to let you know that there is no financial aid data on the Financial Aid tab for the student. You may add award information for the student. However, if any of the awards require a financial aid form to be on file, that award could not be added to the student's record. You will only be permitted to enter awards which do not require a FAF to be on file.

#### Award Code ?? : Award Budget not on File.

Typically that error message means that an Award Budget is missing from the Award Master table (Application Setup > New Year > Awards) for the specific session. However, if you've verified that budget amounts are entered, chances are what's missing is a '01' Institution Code value in the Financial Aid Data section on the Student Tab.

Optionally, you can change the award status for this award to an inactive status (any status other than 1 or 2). You can add the award to the student's record and add the budget at a later time. However, you must remember to go back to the student's record and change the award status to an active status once the budget has been added.

## Student is ineligible for awards in this session due to session eligibility range in the academic plan.

The student's session start and end range on the Student Tab (FAM501) does not fall within the range you are trying to award.

#### Student is not eligible for any awards.

The student has an academic eligibility code on the Student Tab (FAM501) that prevents him from receiving any awards. (These codes were established on the Validation Table under the SAF\_ELIG\_CODE table.)

#### This session has been closed. No updates will be allowed.

Award changes for the session have been closed. You may reopen the session by going to Application Setup  $\rightarrow$  New Year  $\rightarrow$  Import Session. Click the Edit icon [2] and then change the Award Status field to a blank value. (Blank value = session is open. @AWD value = session is closed.)

#### This student already has this award for this institution code and session.

The award code was already assigned to the student for this session. Check the entries on the page for duplicate codes.

## This student is ineligible for awards due to the eligibility code in the academic plan on the fam501 page.

The student has an academic eligibility code on the Student Tab page (FAM501) that prevents him from receiving the award in error. (These codes were established on the Validation Table under the SAF\_ELIG\_CODE table.)

#### Unmet tracking requirements for session – xxxx

Awards may be given to the student as *this is only a warning message*. The message will be displayed when the student has unmet tracking items for previous and current session(s). Students who have unmet tracking items for sessions greater than the one currently being processed will not receive the message.

#### \$\_\_\_ is not between the award limits of \$\_\_\_\_ and \$\_\_\_\_

The Amount field does not contain an acceptable value within the range defined on the award code master (Award Codes FAM623). Be sure to enter the decimal points and cents.

## 5 Financial Aid Tab

#### Financial Aid Data (FAM503)

Navigation: Student Access Bar → Financial Aid Data Tab

Applic	ation Setup	Student	Pel/Loa	n Processing	Work Study	Award Pro	ocessing	ISIR Processing	Reports	Custom Application	5
Studen	t ID: 999999999	86	ZAPIEN, DEANNI	IE - 999999999			Session Fro Session 1	om: 88 To: 88	Find	Insert	icon
	Student	Award F	inancial Aid Aca	ademic Trac	king Comm	ient Activity	Loans	Loan History	Clock Hours 18	iR	
							_				
					Fina	ncial Aid Dat	a 🕐				
			_	S	tudent ID 9999999	999 ZAPIEN, DEA	NNIE - 99999999	9			
			Session Start	Session End	Freeze Status	Student Status Pe		EFC Pell Ella Ed	It Delete		
			B121	B125	N I	N 53	1110455ZA01	0 Y 🌡			
										Insert ISIF	R icon

This chapter describes the different fields and functions within the Financial Aid tab:

- Adding Financial Aid Data
- Updating Financial Aid Data
- Deleting Financial Aid Data

The Financial Aid Data page (FAM503) is used to add or update the information from the student's financial aid form (FAFSA), which is stored and can be viewed through the ISIR Tab. Usually, the data on this page is initiated and updated by DOE Processing need analysis process. Every time FAFLOAD (NED002) is run, data on this page is updated, unless the Freeze Status Code is Y. All FAFSA data will be changed on subsequent runs of the need analysis, unless the Freeze Status Code is Y. (The student status FZ previously used in SAFERS to freeze data on Screen 3 no longer applies in FAM.)

**Note:** Since FAM version 4.17.1, tracking codes can be updated on the Tracking Tab even if the Freeze Status Code is Y on the Financial Aid Data page.

A student would have one Financial Aid Data page on file for each year in attendance. The Financial Aid Data page covers an entire school year with a beginning and ending session.

#### To view financial aid data for a student

- 1. In the Student ID field on the Student Access Bar, enter the student's ID. Or click the Lookup icon 🏶 located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar.
- 4. Click the Financial Aid tab to display the Financial Aid Data page.

Applik	cation Setup	Student	PelM	Loan Processing	Work Study	Award	Processing	ISIR Process	sing f	Reports	Custom Applications	
Studen	t ID: 999999999	9 <b>86</b>	ZAPIEN, DEAN	VNIE - 999999999			Session Fi Session	rom:	86 86	Find		
	Student	Award	Financial Ald	Academic Tra	cking Com	ment Activi	ty Loans	Loan His	tory Cloc	k Hours I	SIR	
					Fina	ancial Aid D	ata 🕐					
					Student ID 99999	9999 ZAPIEN, D	EANNIE - 9999999	999				
			Session Star	rt Session End	Freeze Status	Student Status	Pell ID	EFC Pell B	ilg Edit C	elete		
			B121	B125	N	IN	531110455ZA01	0 Y	12	6		

## 5.1 Adding Financial Data

#### To manually add financial aid data for a student

- 1. Begin accessing the financial data page for the student, as described on the first page of the Financial Aid Tab section.
- 2. Click the Insert icon **I** located at the top, right corner of the Financial Aid Data table. (Don't click the Insert ISIR icon **I**, which is to the right of the Insert icon **I**. Clicking the Insert ISIR icon will reload current data from an existing ISIR into the Financial Aid Data page.)

Æ 48 ard Financial Aid Acader nic Tracking Cor ent Activity ry C Financial Aid Data Create 🕐 Student ID 999999999 ZAPIEN, DEANNIE - 999999999 Save & Add More Save & Go Back Save Cancel Freeze Status 🛛 N 😽 48 sion Start COD Citizenship Status Code Do not override \* Child Can Budget Amou idget Mor Package Code 44 Add'l Amount Enrollment æ AA. AA. AA. Budget Code 48 48 Parent a Parent Contrib of Contributio Dep/Indep Code 48 A Parent Contrib IM Student Contribution Year in School Parent/Student Marital **3** AB. EFC SAR Record ID nt Code Hours Year Hours Exp 0 Save & Add More Save & Go Back Save Cancel

The Financial Aid Data Create page is displayed:

- 3. Complete the fields on the page as required. You can press the Tab key to move from field to field.
- 4. Click one of the save option buttons at the bottom of the page:
  - Save & Add More: Saves your work and clears the fields in the Financial Aid Data Create page so you can create another new record.
  - Save & Go Back: Saves your work and goes back to the Financial Aid Data page.
  - Save: Saves your work but does not clear the fields in the Financial Aid Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to add financial data to the student's record.

**Note:** The Insert ISIR icon is on the Financial Aid data page provides a method to load or reload data from an existing ISIR for the selected student. The ISIR data would have had to already been uploaded into FAM through the ISIR Upload process (NED006). For additional information on loading ISIR data, see the *Loading ISIR Applicant Data into FAM* documentation, available on the SBCTC-IT web site.

### 5.2 Updating Financial Data

#### To manually update financial aid data for a student

- 1. View the financial data for the student, as described on the first page of the Financial Aid Tab section.
- In the Edit column on the Financial Aid Data page, click the Edit icon
   corresponding to the session you want to edit.

The Financial Aid Data Edit page is displayed.

Student Award Financial Ald Academic Tracking Comment Activity Loans Loan History Clock Hours I SIR
Financial Aid Data Edit 🗹
Student ID 999999999 ZAPIEN, DEANNIE - 999999999
Save & Edit Next Save & Edit Prevlous Save & Go Back Save Update From ISIR Cancel
Student Status IN 36 Institution Code 01 Freeze Status N
Session Start B121 🦓 Session End B125 🖓 COD Citizenship Status Code Do not override
Requirements Complete
- Budget Data
Budget Code 01 🎒 Budget Amount 16750 Child Care 0
Budget Months 9.00 Supplemental 0 Program Costs 0
Package Code NA 🍓 Add1 Amount 0 Scheduled Costs 16750
Extend to B 221 B 122 B 123 B 124 B 125 Niced Amount 18750
Enrollment / 103 1
Budget Code 365 01 665 01 665 01 665
Income Data
Parent income 0 Student income 9920 Parent/Student Children 1 AFDC/TANF 6
Parent Contrib 0 Student Contribution 0 Deplindep Code 1
IM Parent Contrib 99999999 IM Student Contribution 999999999
Year in School 1 🚯 Parent/Student Marital SG 🌒 Pell Ellig Y 🙈
Pell Data
EFC 0 Cost of Education 0 Ed Cost Override 0 Additional Pell N
Enrollment Code 1 A SAR Record ID 1999999992A01
Hours Year 0.00 Hours Exp 0.00 Weeks Year 0.00 Weeks Year 0.00
Save & Edit Next Save & Edit Previous Save & Go Back Save Update From ISIR Cancel

- 3. Edit the data as needed.
- 4. Click one of the Save option buttons at the bottom of the page:
  - Save & Edit Next: Saves your work and goes to the next year/session.
  - Save & Edit Previous: Saves your work and goes to the previous year/session.
  - Save & Go Back: Saves your work and goes back to the Financial Aid Data page.
  - Save: Saves your work but does not clear the fields in the Financial Aid Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to add financial data to the student's record. Or exit the page by clicking a different tab or making a selection from the main menu.

**Note:** The Update From ISIR button on the Financial Aid Data Edit page provides a method to load or reload data from an existing ISIR for the selected student. The ISIR data would have had to already been uploaded into FAM through the ISIR Upload process (NED006). For additional information on loading ISIR data, see the *Loading ISIR Applicant Data into FAM* documentation, available on the SBCTC-IT web site.

## **5.3 Deleting Financial Data**

#### To delete financial aid data for a student

Complete the following steps to delete financial aid data for a student:

- 1. View the financial data for the student, as described on the first page of the Financial Aid Tab section.
- 2. In the Delete column on the Financial Aid Data page, click the Delete icon E corresponding to the session for which you want to delete financial aid data.

Applic	ation Setup	Student	Pell/	Loan Processing	Work Stu	idy ,	Award Processir	ng ISIR F	Processing	Reports	Custom Applications
udent	t ID: 99999	9999 麄	ZAPIEN, DE	ANNIE - 99999	9999		Sess	ion From: ssion To:	66 66	Find	<u>1</u>
	Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan Histor	Clock Ho	urs ISIR
				Stu	dent ID 999		Id Data 🕐	999999999	9		
									-	18 10	
			Session Start	Session End	Freeze Status	Student Status	Pell ID	EFC	Pell Elig Ed	it Delete	∕
			B121	B125	N	IN	999999999	ZA01 0	Y 🎜		Delete icon
			B011	B015	N	IN	999999999	ZA01 0	Y 🍃		

A message is displayed asking you to confirm the deletion.



3. Click the OK button to delete the data, or click the Cancel button if you do not want to delete the data. Or exit the page by clicking a different tab or making a selection from the main menu.

This page inserted for back-to-back printing.

## 6 Academic Tab

#### Academic Data (FAM504)

Navigation: Student Access Bar → Academic Tab

											0				
t ID: 99	9999999	e 🙃	ZAPIEN,	DEANNIE -	9999999	99			Session F	rom:	00		Find		
									Sessio	n To:					
Studer	nt Av	ward	Financial Aid	Acaden	nic Tr	acking	Commen	t Acti	vity Loa	ins Lo	oan Histo	ry Clo	ock Hours	ISI	R
					Stude	nt ID 9999	999999 Z/	PIEN, DE	ANNIE - 9999	999999	_			_	le le
1		_	_	_	Stude	nt ID 9999	999999 ZA	PIEN, DE	ANNIE - 9999	999999	1	0			
4	Session	Degree	Curriculum	Attempted	Stude	nt ID 9999	099999 ZA	PIEN, DE	ANNIE - 9999	Session	Cum	Cum Transfer	Academic Hours	Edit	Delete
5	Session	Degree	Curriculum Code	Attempted	Stude Earned	nt ID 9999	099999 ZA Override Ind	PIEN, DE Override Hours	ANNIE - 9999 Hours Adjustment	Session GPA	Cum GPA	Cum Transfer Hrs	Academic Hours Posted	Edit	Delete
S	Session B122	Degree 715	Curriculum Code	Attempted	Stude Earned	nt ID 9999 Funded 15.00	099999 Z4 Override Ind	PIEN, DE Override Hours 0.00	ANNIE - 9999 Hours Adjustment 0.00	Session GPA	Cum GPA 0.000	Cum Transfer Hrs 0.00	Academic Hours Posted 10/20/2011	Edit	Delete

This chapter describes the different fields and functions within the Academic tab:

- Adding Student Academic Data
- Updating Student Academic Data
- Deleting Student Academic Data

The student academic data tab (FAM504) contains the student's academic information for each session they are in attendance, including the session hours/units enrolled and the grade point average (GPA). Interfaces to the Student Management System (SMS) may automatically move the units and GPA figures to this page, eliminating the need for Financial Aid staff to enter them manually.

Currently, there are several batch jobs that are able to automatically update academic data. They are: SM9109J, SM9110J, SM9112J and AG906R (if 'Y' is entered in the SM9408-UPD-ACAD job parameter). See Job Documentation at the SBCTC-IT website http://apps.sbctc.edu/jobdoc/ for each of the listed jobs for more information.

#### To view academic data for a student

- 1. In the Student Access Bar, complete the Student ID field. Or click the Lookup icon a located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar.
- 4. Click the Academic tab to display the Academic Data page:

dent	Award	Financial Aid	i Acaden	nic Tr	acking	Commen	nt Acti	vity Loa	ns Lo	an Hist	ory Clo	ock Hours	ISI	R
						Acader	nic Dat	a 🕐						
Student ID 999999999 ZAPIEN, DEANNIE - 999999999														
Student ID 999999999 ZAPIEN, DEANNIE - 999999999														
		Curriculum				Override	Override	Hours	Session	Cum	Cum	Academic		
Sessio	n Degree	Code	Attempted	Earned	Funded	Ind	Hours	Adjustment	GPA	GPA	Transfer Hrs	Hours Posted	Edit	Delete
B122	715		15.00	15.00	15.00		0.00	0.00	0.000	0.000	0.00	10/20/2011	5	5
A892	774		12.00	10.00	10.00		0.00	0.00	0.000	0.000	0.00	10/20/2011	5	5

## 6.1 Adding Student Academic Data

The information displayed on this page depends upon whether the student is a new or current student.

#### To manually add student academic data to a student record

Complete the following steps to add student academic data to a student record:

- 1. Begin accessing the academic data page for the student, as described on the first page of the Academic Tab section.
- 2. Click the Insert icon **a** located at the top, right corner of the data table in the Academic Data page.

The Academic Data Create page is displayed.

Section From: 🙃 Find	
Student ID: Session To: 38	
Student Award Financial Aid Academic Tracking Comment Activity Plus Borrowers Loan History Clock Hours ISI	٤
Academic Data Create 🕐	
Student ID 99999999 SMITH, DOROTHY - 99999999	
Session	
Degree	
Curric Code	
Appeal Code	
Appeal Date	
Acad Stat	
Session GPA 0.00	
Cum GPA 0.00	
Cum QPA	
Withdraw Code 🍂	
Withdraw Date	
Acad Misc 1	
Acad Misc 2	
Cum Transfer Hrs 0.00	
CIP Code	
Grade Level Blank	
Session Unit/Hrs	
Attempted 0.00	
Earned 0.00	
Funded 0.00	
Override Ind	
Override Hours 0.00	
Hours Adjustment 0.00	
Misc Code 1 0.00	
Misc Code 2 0.00	
Save & Add More Save & Go Back Save   Cancel	

- 3. Complete the fields. The academic data for the student is for a single session, as specified in the Session field.
- 4. Click one of the save option buttons at the bottom of the page:
  - Save & Add More: Saves your work and provides you with a blank session page.
  - Save & Go Back: Saves your work and goes back to the Academic Data page.
  - Save: Saves your work but does not clear the fields in the Academic Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to add academic data to the student's record. Or you can exit the page by clicking a different tab or making a selection from the main menu.

### 6.2 Updating Student Academic Data

#### To manually update student academic data for a student

Complete the following steps to edit academic data in a student record:

- 1. View the academic data for the student, as described on the first page of the Academic Tab section.
- 2. In the Edit column on the Academic Data page, click the Edit icon 💹 corresponding to the session you want to edit.

Academic Data Edit 🕐 nt ID 999999999 ZAPIEN, DEANNIE - 999999999 Save & Edit Previous ] [ Save & Go Back ] [Save] [Cancel ] Save & Edit Next ] [ Update From Student System B122 Acad Stat *3*8 2011 Code CC Session GPA 0.000 Cum GEA 0.000 Charles Canalan Cum QPA Eligible Code 48 tudent Status DV draw Code Session Start ndraw Date Acad Misc 48 Degree 715 Acad Misc 2 0.00 Code Transfer Hrs AR BING CIP Code Annesi Code 101 Grade Level Blank eal Date < on Unit/Hrs 15.00 Override Hou 15.00 0.00 Earned urs Adjustment 0.00 Funded 15.00 Misc Code erride Ind 🔲 0.00 Misc Code 2 Session Hours Funded 0.00 Earned 0.00 rs Posted 10/20/2011 Miscellaneous Section College Level GPA = 0 [ Save & Edit Next ] [ Save & Edit Previous ] [ Save & Go Back ] [Save] [Cancel ]
[ Update From Student System ]

The Academic Data Edit page is displayed.

- 3. Edit the data as needed.
- 4. Click one of the save option buttons at the bottom of the page:
  - Save & Edit Next: Saves your work and displays the next session for the student.
  - Save & Edit Previous: Saves your work and displays the previous session for the student.
  - Save & Go Back: Saves your work and goes back to the Academic Data page.
  - Save: Saves your work but does not clear the fields in the Academic Data Edit page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to add academic data to the student's record.

To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

(Note that the function of the Update From Student System button is unknown at this time. Once information is available, this document will be updated.)

### 6.3 Deleting Student Academic Data

#### To delete academic data for a student

Complete the following steps to delete academic aid data for a student:

- 1. View the academic data for the student, as described on the first page of the Academic Tab section.
- 2. In the Delete column on the Academic Data page, click the Delete icon E corresponding to the session for which you want to delete academic data.

PelVLoan Processing Award Processing Work Study ISIR Pro Session From: æ Student ID: 999999999 👬 Find ZAPIEN, DEANNIE - 99999999 æ X Message from webpage Student Award Financial Aid Academic Loan History Clock Hours ISIR Are you sure you want to delete? Cancel Student Attempted Earned Funded Session Degree Edit Dele Adiu Hours GPA 715 15.00 15.00 0.00 10/20/2011 💹 B122 15.00 0.00 0.000 0.000 0.00 a 774 0.00 0.00 0.000 0.00 A892 12.00 10.00 10.00 0.000 10/20/2011 💹

A message is displayed asking you to confirm the deletion.

3. Click the OK button to delete the data, or the Cancel button if you do not want to delete the data. Or you can exit the page by clicking a different tab or making a selection from the main menu.

7 Tracking Tab

#### Tracking Data (FAM505)

**Navigation:** Student Access Bar  $\rightarrow$  Tracking Tab

Applic	cation Se	etup	Student		Pell/Loan Processing	) Work St	udy	Award Proces	sing 19	IR Processing	Reports	Custo	om Applications
									I				
uden	+ ID+ 9	99999	999 🚓	ZAPIEN	I DEANNIE - 9999	0000		Se	ssion Fron	n: 🚺 🛱	Find		
uucn					, DEMINE - 0000				Session T	o: 👶			
	Stude	ent	Award	Financial Ai	d Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR	
						Tra	cking Sun	many Dat	a 🕗				
									a 🕤				
					Stud	ent Status F	999999999 ZA	PIEN, DEANI PENDENT	VIE - 9999	19999			
											- <b>1</b>		
				Session	Description	Track Cod	le Total 🛛 🛛 D	ate Notified T	otal [	ate Received Total	Edit		
				B121	SUMMER 11	7	2		4		5		
				A891	SUMMER 08	3	1		2		12		

This chapter describes the different fields and functions within the Tracking tab:

- Adding Tracking Data
- Updating Tracking Data
- Deleting Tracking Data
- Attaching an electronic document

The Tracking Summary Data page (FAM505) tracks which documents are due from the student, the date the documents are due, the date the student was last notified about the documents, and the date the documents were received by the Financial Aid Office. A comment area is also available to denote specific information regarding the document. Some schools use this page to record student activities as well as documents. Normally, a student will have tracking data on file for the starting session of the school year.

It is suggested that tracking data always be stored in the session you have designated as the start session for the academic year on your session master, Sessions (FAM622). Reporting is easier if the student's tracking data is recorded in the same session, regardless of the actual session in which the student starts.

#### To view tracking data for a student

- 1. In the Student ID field on the Student Access Bar, enter the student's ID and click the Find button. Or you can click the Lookup icon 🏶 located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar.
- 4. Click the Tracking tab to display the Tracking Summary Data page.

Ident	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
							~			
				Tra	cking Sun	nmary Dat	a 🕐			
				Student ID 99	99999999 ZA	PIEN, DEANN	IIE - 99999	99999		
			Stu	dent Status D	/ DE	PENDENT				
		Session	Description	Track Code	Total D	ate Notified To	otal C	ate Received Total	Edit	
		B121	SUMMER 11	7	2		4		5	
		A801	SUMMER 08	3	1		2			
		AUST								

## 7.1 Adding Tracking Data

# To manually add tracking data for a student who *does not* already have tracking data for a session

- 1. Begin accessing the tracking data page for the student, as described on the first page of the Tracking Tab section.
- 2. Click the Insert icon 🖾 located at the top, right corner of the data table in the Tracking Summary Data page.

The Tracking Session Data Create page is displayed. The data on this page includes the student's ID, name, and status.

Арр	lication Setup	Student	Pel	VLoan Processing	Work St	udy	Award Proce	ssing IS	R Processing	Reports	Custo	n Applications
Stude	nt ID: 99999	9999 🔗	ZAPIEN, D	EANNIE - 99999	9999		Se	ession From	- <b>6</b> 6	Find		
	Student	Award	Financial Aid	Academic	Fracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR	
					Track	ing Sessio	n Data C	reate 飞				
				S	udent ID 99	99999999 ZA	PIEN, DEAN	INIE - 99999	9999			
				Slude	Session		EPENDENT					
						Next	Cancel					

3. In the Session field, type the code for the session to which the new data applies.

**Note:** The Tracking Summary page sorts the sessions in descending order (Z-A). Therefore, session 0000 will be listed as the last session on this page.

4. Click the Next button.

The Tracking Data Maintenance page is displayed:

					Student S Student S	tatus DV ssion B122	Data M Dep	IEN, DEA ENDENT	ance 🕜 NNIE - 999999999				
						Save & Go	Back	Save	Cancel				
Track	Tra	ck cription	Due Date		Date Notified	Date Receiv	/ed	Notation	Comment			Attachment	Delete
-			Use the fo	llowing n	owa to add new tr	acking items.	You car	n add ad	ditional tracking i	tems after saving the	se four.		
	<b>86</b>						080		8		50		
	<i>8</i> 6			-					8		0		
	36		[						6		0		
-	26		L			0			8		0		-

5. Complete the fields on this page for up to four rows of tracking data and click the Save button. An additional group of four rows appears after you save a group of four rows.

Clicking the Save & Go Back button saves your data and redisplays the Tracking Summary Data page. Or click the Cancel button if you do not want to add the data.

**Note:** The Automatic Tracking process (FAM057) can be used to automatically post tracking items on student's record. For more information, see section 4.4 of the *Loading ISIR Applicant Data into FAM* documentation at the SBCTC-IT website.

## 7.2 Updating Tracking Data

# To manually update tracking data for a student who already has tracking data for a session

- 1. View the tracking data for the student, as described on the first page of the Tracking Tab section.
- 2. In the Edit column on the Tracking Summary Data page, click the Edit icon 💹 corresponding to the session you want to update.

The Tracking Data Maintenance page is displayed. The data on this page includes the student's name, ID, status, and any existing tracking data for the session.

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09 🍂	ELECTRNIC STU AID REPORT	03/25/2011	<b>1</b>	03/11/2011	NR 🏔		Attach	
AD 👪	APPLY FOR ADMISSION	03/25/2011 📼		10/05/2011	RQ 🍂		Attach	
DF 🍂	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ 🍂	132	Attach	
MA 🎒	Test One for Auto Tracking	03/25/2011 📼	10/20/2011		NR 🍰	( )	Attach	
WA 🍂	STATE NEED GRANT NOMINEE	03/11/2011			EL 🍂	2682-0500	Attach	
	L	lse the following row	s to add new tracki	ng items.You can ad	d additional	tracking items after saving these four.		
<b>8</b>					<b>86</b>			
<b>#</b>					<b></b>			
					<b>86</b>			
				Save & Go Back Sa	ve Cancel			

- 3. Edit the data as needed.
- 4. After updating the fields, click the Save button at the bottom of the page. Click the Cancel button if you do not want to save the changes. Clicking the Save & Go Back button saves your changes and redisplays the Tracking Summary Data page.
- 5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.
- **Note**: A maximum of 70 characters can be entered into the Comment field box. If more than 70 characters are entered, an error message appears.

## 7.3 Deleting Tracking Data

#### To delete tracking data from a student record

- 1. View the tracking data for the student, as described on the first page of the Tracking Tab section.
- 2. In the Edit column on the Tracking Summary Data page, click the Edit icon 🕼 corresponding to the session you want to delete.

The Tracking Data Maintenance page is displayed. The data on this page includes the student's name, ID, status, and any existing tracking data for the session.

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09 🍂	ELECTRNIC STU AID REPORT	03/25/2011		03/11/2011	NR 🍂	())	Attach	
AD 🕷	APPLY FOR ADMISSION	03/25/2011 📼		10/05/2011 📼	RQ 🍂		Attach	
DF 🍂	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ 🍂	132	Attach	
MA 👪	Test One for Auto Tracking	03/25/2011	10/20/2011 📼		NR 🍂		Attach	
WA	STATE NEED GRANT NOMINEE	03/11/2011			EL 🍂	2682-0500	Attach	Delete Check Box
	L	lse the following row	is to add new tracki	ing items. You can ad	ld additional	tracking items after saving these four.		
					<b>8</b>			
					<b></b>			
					<b>#6</b>			
					<b>*</b>			
				Save & Go Back Sa	ve Cancel			

- 3. In the Delete column on the Tracking Data Maintenance page, click one or more checkboxes corresponding to the session(s) for which you want to delete tracking data.
- 4. Click the Save button to delete the data you have selected. Or click the Cancel button if you do not want to delete the data. Clicking the Save & Go Back button deletes the data and redisplays the Tracking Summary Data page.
- 5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

## 7.4 Attaching an Electronic Document

#### To attach an electronic document to the Tracking Data Maintenance page

- 1. View the tracking data for the student, as described on the first page of the Tracking Tab section38.
- 2. In the Edit column on the Tracking Summary Data page, click the Edit icon 💹 corresponding to the session you want to delete.

The Tracking Data Maintenance page is displayed. The data on this page includes the student's name, ID, status, and any existing tracking data for the session.

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09 🍂	ELECTRNIC STU AID REPORT	03/25/2011	<b>1</b>	03/11/2011	NR 🏔		Attach	
AD 🍂	APPLY FOR ADMISSION	03/25/2011 📼		10/05/2011 📼	RQ 🍂		Attach	
DF 🍂	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ 🍂	132	Attach	
MA	Test One for Auto Tracking	03/25/2011	10/20/2011 📼		NR 🍂		Attach	
WA 🍂	STATE NEED GRANT NOMINEE	03/11/2011			EL 🍂	2682-0500	Attach	
	U	lse the following row	s to add new tracki	ing items. You can ad	ld additional	tracking items after saving these four.	Attach	
<b>A</b>					<b></b>		link	
<b>#</b>					<b></b>			
<b></b>					<b></b>			
<b>A</b>					<b>#</b>			
				Save & Go Back Sa	ve) Cancel			

3. Click the **Attach** link located in the Attachment column for the applicable tracking item that you would like to attach the document to.

The Upload Attachment page is displayed.

4. Enter the file name in the File field box.

—or—

Click the Browse button to locate the file that has been previously saved on your PC or network drive.

**Note:** The electronic document must be saved in one of the formats listed on the page (.doc, .xls, .pdf, .pff, .jpg, .gif, .tif).



5. Click the Upload button to attach the document to the Tracking tab. The Tracking Data Maintenance page is displayed.

Click the Cancel button to go back to the Tracking Data Maintenance page without uploading an attachment.

A **Download** and **Delete** link are displayed in the Attachment column for the tracking item you attached the document to, confirming that your electronic document has been attached:

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09 🍂	ELECTRNIC STU AID REPORT	03/25/2011		03/11/2011	NR 🍂		Download Delete	
AD 🍂	APPLY FOR ADMISSION	03/25/2011		10/05/2011 📼	RQ 🍂		Attach	
DF 🍂	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ 🍂	132	Attach	
ма	Test One for Auto Tracking	03/25/2011	10/20/2011		NR 🍂		Attach	
WA 🍂	STATE NEED GRANT NOMINEE	03/11/2011			EL 🍂	2682-0500	Attach	
	Use	the following rov	s to add new track	king items. You car	n add addit	ional tracking items after saving these four.		
<b>8</b>					<b>1</b>			
<b>8</b>					<b>*</b>			
<b>86</b>					<b>#6</b>			
<b>#</b>		103			<b>A</b>	<		
				Save & Go Back	Save Cano	8		

6. To view an attached document, click the **Download** link in the Attachment column. The File Download dialog box is displayed, giving you the option to either directly open and view the document or save it to your PC or network drive:

File Dov	vnload 🛛 🔀
Do you	u want to open or save this file?
POF	Name: SBCTC Letter Head.pdf Type: Adobe Acrobat Document, 49.2KB From: <b>fasq.ctc.edu</b>
	Open Save Cancel
0	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>

- 7. To remove an attachment from a tracking item, click the **Delete** link in the Attachment column. (*Do not* select the Delete check box in the Delete column. Doing so removes the entire tracking item form the Tracking Data Maintenance page.)
- 8. A dialog box is displayed asking you to confirm that you want to remove the attachment:

Windows Internet Explorer 🛛 🛛 🔀
Are you sure you want to delete?
OK Cancel

9. Click the OK button to delete, or click the Cancel button if you do not want to remove the attachment.

8 Comment Tab

#### Comment Data (FAM507)

Navigation: Student Access Bar → Comment Tab

Stude	ent ID: 99999	9999	ZAPIEN, I	DEANNIE - 999	999999		S	ession From: Session To:	ation and a constant of the second se	Find		
	Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR	
				S	itudent ID 999	Comment Da 999999 ZAPI	ita Create ? EN, DEANNI	) E - 99999999	9			
			S	ession	<b>#</b>							
			E	Block #	🗹 A1	uto Generate						
				Туре	<b>8</b>							
			Co	mment					<u>^</u>			
					ave & Add Mo	re Sav	e & Go Back	Save Car	ncel			

This chapter describes the different fields and functions within the Comment tab:

- Adding Comment Data
- Updating Comment Data
- Deleting Comment Data

The comment data page (FAM507) is used to record any comments or miscellaneous information you wish to maintain about the student, including professional judgment comments. Comment data may be distinguished by session and type codes. Furthermore, comments are grouped by blocks (within the sessions) to allow multiple comments to be maintained per session and type code.

**Note**: If comments exist for a student, you can view the information without having it open in edit form by clicking the year-quarter session in the far-left column.

#### To view comment data for a student

- 1. In the Student ID field on the Student Access Bar, enter the student's ID and click the Find button. Or click the Lookup icon 🏶 located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar.
- 4. Click the Comment tab to display the Comment Data page:

ent	Award	Fin	ancial Aid Aca	ademic Tracki	ng Comment	Activity	L	oans Loan History	Clock Hours ISIR		Inser
				Stude	Comm	ent Data	2	00000000		<	
				Slude	NLID 9999999999 Z/	APIEN, DEAN	INE	- 999999999			5
Session	Block #	Туре	Posted By	Updated By	Comment		F	Posted On	Updated On	Edit	Delete
B122	0		895jreichmann	895jreichmann	10/20/2011 St only has aid	tudent 4	2	2011-10-20 10:44:25.433	2011-10-20 10:52:23.32	1	ā
A892	1		895jreichmann	895jreichmann	09/26/2008 SI WAS AWARDED B	TUDENT	2	2011-10-20 10:42:13.463	2011-10-20 10:43:23.97	Ø	ā

### 8.1 Adding Comment Data

#### To add comment data to a student record

- 1. Begin accessing the comment data page for the student, as described on the first page of the Comment Tab section.
- 2. Click the Insert icon **[5]** located at the top, right corner of the data table in the Comment Data page.

The Comment Data Create page is displayed.

Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR	
					Comment Da	ta Create ?					
			4	Student ID 999	9999999 ZAPI	EN, DEANNIE	E - 99999999	9			
		s	ession	<b>8</b>							
		F	Block #	A	uto Generate						
			Туре	<b>A</b>							
		Co	omment	J~~				~			
								-			
									1		
				Save & Add Mo	ore Save	e & Go Back	Save Ca	ncel			

3. In the Session field, type the code or click the Lookup icon 🏶 to look for the session to which the comment applies.

**Note:** Information on how to use the Block # field is currently unavailable. This document will be updated once the information is available.

- 4. In the Type field, type the code or click the Lookup icon 🔅 to look for the comment type.
- 5. Type comment(s) in the Comment field. The format is free-form. As you type, words automatically wrap to a new line, so there is no need to press the Return key. Comments are printed on the student inquiry exactly as you type them in this field.
- 6. Click one of the save option buttons at the bottom of the page:
  - Save & Add More: Saves your work and clears all the fields on the page so that you can add another comment for the same student.
  - Save & Go Back: Saves your work and goes back to the Comment Data page.
  - Save: Saves your work but does not clear the fields in the Comment Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to add comment data to the student's record.

7. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

Note: A maximum of 2100 characters may be entered into the Comment field box.

## 8.2 Updating Comment Data

#### To update comment data for a student

- 1. View the existing comment data for the student, as described on the first page of the Comment Tab section.
- 2. In the Edit column on the Comment Data page, click the Edit icon 💹 corresponding to the session you want to update.

Session From: Student ID: 999999999 💏 Find ZAPIEN, DEANNIE - 999999999 â Session To Student Award Financial Aid Academic Tracking Comment Activity Loans ISIR Loan History Clock Hours Comment Data Edit 🕐 Student ID 999999999 ZAPIEN, DEANNIE - 999999999 Session B122 a Block # 0 🗌 Auto Generate Туре æ. Comment 10/20/2011 Student only has aid through B123. Student needs to meet with an Academic Advisor in order to receive aid for B124. Save & Edit Next Save & Edit Previous Save & Go Back Save Cancel

The Comment Data Edit page is displayed.

- 3. Edit the data as needed.
- 4. After updating the fields, click one of the save options at the bottom of the page.
  - Save & Edit Next: Saves your work and goes to the next year/session.
  - Save & Edit Previous: Saves your work and goes to the previous year/session.
  - Save & Go Back: Saves your work and goes back to the Financial Aid Data page.
  - Save: Saves your work but does not clear the fields in the Financial Aid Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to save the changes.

5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

## 8.3 Deleting Comment Data

#### To delete comment data for a student

- 1. View the existing comment data for the student, as described on the first page of the Comment Tab section.
- 2. In the Delete column on the Comment Data page, click the Delete icon E corresponding to the session for which you want to delete comment data.

A. Student ID: 999999999 👸 Find ZAPIEN, DEANNIE - 999999999 Message from webpage X æ Student Award Financial Aid Academic Tracking Loan History Clock Hours Are you sure you want to delete? OK Cancel Student Block Type Posted By Updated By Posted On Updated On Edit Delete Session Comment 10/20/2011 Student 0 2011-10-20 10:44:25.433 2011-10-20 10:52:23.32 ē 895ireichmann 895ireichmann B122 only has aid 09/26/2008 STUDENT 895jreichmann 895jreichmann WAS AWARDED FULL 5 2011-10-20 10:42:13.463 2011-10-20 10:43:23.97 💹

A message is displayed asking you to confirm the deletion:

- 3. Click the OK button to delete the data, or click the Cancel button if you do not want to delete the data.
- 4. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

This page inserted for back-to-back printing.

## 9 Activity Tab

#### Activity Data (FAM508)

**Navigation:** Student Access Bar  $\rightarrow$  Activity Tab

Studen	t ID: 99999	9999 🗛	ZAPIEN DE	ANNIE - 9999	οοοοο			Sessio	n From:		<b>8</b>	Find	٦.		
Juuen		~	251 1211, 02	.AITIL - 5555				Ses	ion To:		<b>8</b> 8				
	Student	Award F	inancial Aid	Academic	Tracking	Comment	Activ	rity l	oans	Loan His	story C	lock Hour	s IS	iR	
						Activity	Data	2							
				s	tudent ID 99990				000000	aa					
					Instituti	on Code 01	Studen	t Stat DV	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	55					
													lē.		
		Session	Activity Code	Description		Activit	Date	Misc Cod	e 1 Mis	sc Code 2	Misc Cod	e 3 Edit I	Delete		
		A892	BUDGET	BUD CDS F	OR SCHED CO	STS 10/01	2008						6		

This chapter describes the different fields and functions within the Activity tab:

- Adding Activity Data
- Updating Activity Data
- Deleting Activity Data

An unlimited number of activities may be assigned to students using the Activity Tab (FAM508). Activity codes are used a great deal in the scholarship search module (Scholarship Search). However, if your school is not using this module, you may still want to define activity codes and assign them to students. The reason for this might be for correspondence purposes. Before activity codes may be assigned to students, the activity code must be established on the activity code master using Activity Codes (FAM626). In addition to the activity code, the Activity tab provides for three user-defined codes to be associated with each activity as well as an activity date. Depending on whether you enter a session or session range will determine the information that will be displayed for that student.

#### To view activity data for a student

- 1. In the Student Access Bar, complete the Student ID field. Or click the Lookup icon located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar.
- 4. Click the Activity tab to display the Activity Data page:

Activity Data (?) Student D 99999999 ZAPIEN, DEANNIE - 999999999 Institution Code 01 Student Stat DV Session Activity Code Description Activity Date Misc Code 1 Misc Code 2 Misc Code 3 Edit Delete	Activity Data ? Student ID 999999999 ZAPIEN, DEANNIE - 9999999999 Institution Code 01 Student Stat DV Session Activity Code Description Activity Date Misc Code 1 Misc Code 2 Misc Code 3 Edit Delete A892 BUDGET BUD CDS FOR SCHED COSTS 10/01/2008	Student	Award	Financial Aid	Academic	Tracking	Comment	Activ	/ity Lo	ans	Loan Hi	story C	Clock Hou	irs
Activity Data (?) Student ID 99999999 ZAPIEN, DEANNIE - 999999999 Institution Code 01 Student Stat DV Session Activity Code Description Activity Date Misc Code 1 Misc Code 2 Misc Code 3 Edit Delete	Activity Data ?         Student ID 999999999 ZAPIEN, DEANNIE - 999999999         Institution Code 01 Student Stat DV         Session       Activity Code       Description       Activity Date       Misc Code 1       Misc Code 3       Edit       Delete         A892       BUDGET       BUD CDS FOR SCHED COSTS       10/01/2008       Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Activity Date       Misc Code 1       Misc Code 2       Misc Code 3       Edit       Delete         A892       BUD GET       BUD CDS FOR SCHED COSTS       10/01/2008       Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2"													
Activity Data 🕑 Student ID 999999999 ZAPIEN, DEANNIE - 999999999 Institution Code 01 Student Stat DV Session Activity Code Description Activity Date Misc Code 1 Misc Code 2 Misc Code 3 Edit Delete	Activity Data I         Student ID 999999999 ZAPIEN, DEANNIE - 999999999         Institution Code 01 Student Stat DV         Session Activity Code       Description       Activity Date       Misc Code 1       Misc Code 3       Edit       Delete         A892       BUDGET       BUD CDS FOR SCHED COSTS       10/01/2008       Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Activity Date       Misc Code 1       Misc Code 2       Misc Code 3       Edit       Delete         A892       BUDGET       BUD CDS FOR SCHED COSTS       10/01/2008       Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2"						A							
Student ID 999999999 ZAPIEN, DEANNIE - 999999999 Institution Code 01 Student Stat DV	Student ID 999999999 ZAPIEN, DEANNIE - 999999999         Institution Code 01 Student Stat DV         Session       Activity Code       Description       Activity Date       Misc Code 1       Misc Code 2       Misc Code 3       Edit       Delete         A892       BUDGET       BUD CDS FOR SCHED COSTS       10/01/2008       Image: Code 3       Im						Activity	Data	<u>@</u>					
Institution Code 01 Student Stat DV	Institution Code 01 Student Stat DV				5	Student ID 9999	99999 ZAPIE	EN, DE	ANNIE - 999	99999	99			
Session Activity Code Description Activity Date Misc Code 1 Misc Code 2 Misc Code 3 Edit Delete	Session       Activity Code       Description       Activity Date       Misc Code 1       Misc Code 2       Misc Code 3       Edit       Delete         A892       BUDGET       BUD CDS FOR SCHED COSTS       10/01/2008       Image: Code 3       Image					Institu	tion Code 01	Studen	t Stat DV					
Session Activity Code Description Activity Date Misc Code 1 Misc Code 2 Misc Code 3 Edit Delete	Session     Activity Code     Description     Activity Date     Misc Code 1     Misc Code 2     Misc Code 3     Edit     Delete       A892     BUD GET     BUD CDS FOR SCHED COSTS     10/01/2008     Image: Code 3													هًا.
	A892         BUD GET         BUD CDS FOR SCHED COSTS         10/01/2008         Image: Cost Schedule         Image: Cost Schedule <thimage: c<="" td=""><td></td><td>Session</td><td>Activity Code</td><td>Description</td><td></td><td>Activit</td><td>y Date</td><td>Misc Code</td><td>1 Mis</td><td>c Code 2</td><td>Misc Cod</td><td>le 3 Edit</td><td>Delete</td></thimage:>		Session	Activity Code	Description		Activit	y Date	Misc Code	1 Mis	c Code 2	Misc Cod	le 3 Edit	Delete
A892 BODGET BOD CDS FOR SCHED COSTS 10/01/2008			A892	BUDGET	BUD CDS F	OR SCHED C	OSTS 10/01/	/2008					1	5

## 9.1 Adding Activity Data

#### To add activity data to a student record

- 1. Begin accessing the activity data page for the student, as described on the first page of the Activity Tab section.
- 2. Click the Insert icon **[**<sup>1</sup>/<sub>6</sub> located at the top, right corner of the data table in the Activity Data page.

The Activity Data Create page is displayed:

Ар	plication Setu	b Student	P	elVLoan Processir	ng Work S	tudy	Award Pro	cessing	ISIR Processing	Reports	Custom Ap	plications
tud	ent ID: 999	999999 麄	ZAPIEN,	DEANNIE - 9999	99999			Session Fro Session	om: 68 To: 68	Find		
	Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR	
				St St	A A A I I I ave & Add Mo	Activity Dat 999999 ZAPII Session Ctivity Code Activity Date Alisc Code 1 Alisc Code 2 Alisc Code 3 Alisc Cod	a Create EN, DEANN A A A A A A A A A A A A A A A A A A	(?) IIE - 999999 () () () () () () () () () () () () ()	0999 Cancel			

- 3. In the Session field, type the session code to which the activity record is to be assigned.
- 4. In the Activity Code field, type the activity code to which the activity record is to be assigned. You can click the Lookup icon 🏶 to display a list of valid codes for your college.
- 5. In the Activity Date field, enter the date associated with the activity, or click the calendar icon to select from a calendar window. If you want to enter today's date in this field, type **d** and press the Return key.
- 6. Click one of the save option buttons at the bottom of the page:
  - Save & Add More: Saves your work and clears all the fields on the page so that you can add another activity for the same student.
  - Save & Go Back: Saves your work and goes back to the Activity Data page.
  - Save: Saves your work but does not clear the fields in the Activity Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to add activity data to the student's record.

7. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

## 9.2 Updating Activity Data

#### To update activity data for a student

- 1. View the existing activity data for the student, as described on the first page of the Activity Tab section.
- 2. In the Edit column on the Activity Data page, click the Edit icon 💹 corresponding to the session you want to update.

Арр	lication Setup	Student	P	eWLoan Process	ing Work S	tudy	Award Proc	essing IS	R Processing	Reports	Custom Applica	tions
tuck	ant ID: 9999	99999 🙈	7APIEN. I	DEANNIE - 999	aaaaa		S	ession From	: 66	Find		
tuut			2511 1211					Session To	: 66			
	Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR	
						Activity Da	ata Edit 🔇					
				s	tudent ID 999	9999999 ZAPI	EN, DEANNI	E - 9999999	99			
				:	Session A892	2 🍓						
				Activi	ty Code BUD	GET 🎒 B	OD CDS FO	R SCHED C	OSTS			
				Activ	ity Date 10/0	1/2008 📴						
				Misc	Code 1	<b>ä</b> ä						
				Misc	Code 2	<b>ä</b>						
				Misc	Code 3	<b>ä</b>						
				Save & Edit Next	Sav	e & Edit Previous	s Sav	/e & Go Back	Save Cance	1		

The Activity Data Edit page is displayed:

- 3. Edit the data as necessary.
- 4. After updating the fields, click one of the save options at the bottom of the page.
  - Save & Edit Next: Saves your work and goes to the next year/session.
  - Save & Edit Previous: Saves your work and goes to the previous year/session.
  - Save & Go Back: Saves your work and goes back to the Financial Aid Data page.
  - Save: Saves your work but does not clear the fields in the Financial Aid Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to save the changes.

5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

### 9.3 Deleting Activity Data

#### To delete activity data for a student

- 1. View the existing activity data for the student, as described on the first page of the Activity Tab section.
- 2. In the Delete column on the Activity Data page, click the Delete icon 🖾 corresponding to the session for which you want to delete activity data.



A message is displayed asking you to confirm the deletion:

Windows Internet Explorer	×
Are you sure you want to de	elete?
OK Cancel	

- 3. Click the OK button to delete the data, or click the Cancel button if you do not want to delete the data.
- 4. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

## 10 Loan History Tab

Loan History Maintenance (FAM601)

**Navigation:** Student Access Bar  $\rightarrow$  Loan History Tab

Appli	cation Setup	Student	PelV	Loan Processing	g Work Stu	dy /	Award Process	ing ISIR	Processing	Reports	Custom Applications
Studer	nt ID: 99999	9999 <mark>66</mark>	ZAPIEN, DE	ANNIE - 99999	99999		Ses	sion From: ession To:		Find	
	Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
	Loan History Maintenance Student ID 999999999 ZAPIEN, DEANNIE - 999999999 Award Year Search										
			Awar Year	d Aggregate Outstandi	e Combined ng Balance	DL Master Prom Note	DL PLUS Master Pro Note	m Loan Default	Edit Del	ete	
			12	413		N		Y		3	
								·			

This chapter describes the different fields and functions within the Loan History tab:

- Adding Loan History Data
- Updating Loan History Data
- Deleting Loan History Data

The Loan History tab allows you to view, insert, and modify a student's loan history data for a given award year. Both a summary view and detail view for each loan that has been entered is available. The Loan History Summary and Detail pages are normally updated through the FAF Load process (NED002). However, when the Override Load Flag checkbox is selected, the loan history summary and detail pages will *not* be updated.

#### To view loan history data for a student

- 1. In the Student Access Bar, complete the Student ID field. Or click the Lookup icon located to the right of the Student ID field and use the FAM Name Lookup window to find an existing student's record.
- 2. (Optional) Complete the Session From and Session To fields. Leaving the Session From and Session To fields blank returns all information for the student for the current and previous sessions.
- 3. Click the Find button in the Student Access Bar.
- 4. Click the Loan History tab to display the Loan History Maintenance page.

Applic	ation Setup	Student	Pel/L	oan Processing	Work Stu	dy .	Award Proces	sing ISIR	Processing	Reports	Custom Application
Studen	t ID: 99999	9999 🙈	ZAPIEN, DEA	ANNIE - 999999	999		Se	ssion From:	66	Find	
								Session To:	68		
	Student	Award	Financial Aid	Academic <sup>1</sup>	Fracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
					Loar	HISTORY M	aintenan	ce 🕑			
				Stu	ident ID 99	9999999 ZAP	IEN, DEANN	IE - 9999999	99		
				Awa	rd Year						
					Search						
						-				- <b>1</b>	
			0		Combined	DI Master	DL PLUS	NSLDS	3		
			Year	Outstandin	d Balance	Prom Note	Master Pr	om Loan	Edit De	elete	
							Note	Defaul			
			12	413		N		Y	<b>↓</b> 22   •	10 I	

## **10.1 Adding Loan History Data**

#### To manually add loan history data to a student record

- 1. Begin accessing the loan history data page for the student, as described on the first page of the Loan History Tab section.
- 2. Click the Insert icon 🖾 located at the top, right corner of the data table in the Loan History Maintenance page.

Арр	lication Setup	Student	Pell/L	oan Processin	g Work Stu	dy .	Award Proces	sing ISIF	Processing	Reports	Custom Applications
Stude	ent ID: 99999	9999 🔗	ZAPIEN, DE	ANNIE - 9999	99999		Ses	sion From: Session To:		Find	
	Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
			Awar Year 12	Av Av Av Aggregat Outstand 413	Loar Student ID 99 vard Year Search e Combined ing Balance	History M 9999999 ZAP	DL PLUS Master Pro Note	Ce ? E - 9999999 m NSLD Loan Defaul Y	S Edit Dek	te	ert icon

The Loan History Summary Create page is displayed:

Stud	ent ID: 999999999	🚳 ZAPIEI	I, DEANNIE	- 9999999999			Session From:	<i>8</i> 6	Find				
	Student Award	Financial Ald	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR		_	
	Loan History Summary Create (?) Sudent ID 99999999 ZAPIEN, DEANNIE - 99999999 Save & Add More Save & Go Back (Save (Cancel)												
		Award 1	rear						Override Load F	lag 🗖			
		Pe						_					
		DL Master Prom	Note Blank	~	DL PLUS M	aster Prom Note	Blank 🚩						
		FFEL Master Prom	Note Blank	~	FFEL PLUS M	aster Prom Note	Blank 🎽						
		Additional Loan	Flag 🗙 🖌			Plus Denied							
		Subsidized Loan Limit	Flag C 🖌		Combined	i Loan Limit Flag	c 🖌						
	NSLD	S Last Transaction Upd	ated		NSLDS (	DB Results Flag	Blank M						
		NSLDS Loan De	fault 📃		Active	Bankruptcy Flag		Paj	ment Arrangement F	lag 🗖			
	Aggregate Con	bined Outstanding Ball	ance	A (	ggregate Sub Outs	standing Balance		Aggregate Uns	sub Outstanding Balar	nce			
	Unallocated Consol	idated Outstanding Ball	ance										
	Aggregate Combi	ned Pending Disburser	ment	Ag	gregate Sub Pendin	ng Disbursement		Aggregate Unsul	b Pending Disbursem	vent 🛛			
		Aggregate Combined 7	fotal		Agg	regate Sub Total			Aggregate Unsub T	otal			
	Una	llocated Consolidated 7	Total										
		Perkins Principal Bala	ance		Perkins Curr	ent Year Amount							
			C	Save & Add M	iore Save &	Go Back S	ave) Cancel	)					

- 3. Enter the data in the applicable fields.
- 4. Click one of the save option buttons at the bottom of the page:
  - Save & Add More: Saves your work and clears all the fields on the page so that you can add another activity for the same student.
  - Save & Go Back: Saves your work and goes back to the Activity Data page.
  - Save: Saves your work but does not clear the fields in the Activity Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to add activity data to the student's record.

5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

**Note:** Loan History Summary data needs to exist before creating Loan History Detail data.

## **10.2 Updating Loan History Data**

#### To update loan history data (summary data) for a student

- 1. Begin accessing the loan history data page for the student, as described on the first page of the Loan History Tab section.
- 2. In the Edit column on the Loan History Maintenance page, click the Edit icon 💹 corresponding to the Award Year you want to update.

	Loan	History Summary Edit (?			
	Student ID 999999	999 ZAPIEN, DEANNIE	- 999999999		
Award Year	12			Override Load F	lag 🔲
Pell ID	999999999ZA01				
DL Master Prom Note	N 🖌	DL PLUS Master Prom Note	N Y		
FFEL Master Prom Note	Blank 🎽	FFEL PLUS Master Prom Note	Blank 🎽		
Additional Loan Flag	Y	Plus Denied			
Subsidized Loan Limit Flag	N 🚩	Combined Loan Limit Flag	N		
NSLDS Last Transaction Updated	01	NSLDS DB Results Flag	1 🚩		
NSLDS Loan Default	V	Active Bankruptcy Flag		Payment Arrangement F	lag 🔲
Aggregate Combined Outstanding Balance	413 Agg	regate Sub Outstanding Balance	413 Aggre	egate Unsub Outstanding Bala	nce O
Unallocated Consolidated Outstanding Balance	0				
Aggregate Combined Pending Disbursement	0 Aggre	gate Sub Pending Disbursemen	t O Aggreg	ate Unsub Pending Disbursem	ient 0
Aggregate Combined Total	413	Aggregate Sub Total	413	Aggregate Unsub T	otal O
Unallocated Consolidated Total	0				
Perkins Principal Balance	0	Perkins Current Year Amoun	t 0		
Sa	we & Edit Next Save 8	& Edit Previous Save &	Go Back Save C	ancel	
					1
Loan Sequence Grade Number Level Status	Program Code Begin Date	e End Date Net Amount	Aggregate Principal Balance	Aggregate Principal Balance Date	Edit Delete
1 1 DU	SF 09/21/199	8 06/09/1999 875	413	06/16/2010	12 I

The Loan History Summary Edit page is displayed:

- 3. Edit the data as necessary.
- 4. After updating the fields, click one of the save options at the bottom of the page.
  - Save & Edit Next: Saves your work and goes to the next year/session.
  - Save & Edit Previous: Saves your work and goes to the previous year/session.
  - Save & Go Back: Saves your work and goes back to the Financial Aid Data page.
  - Save: Saves your work but does not clear the fields in the Financial Aid Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to save the changes.

5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

# To update loan history data (detail data) for a student

- 1. Begin accessing the loan history data page for the student, as described the first page of the Loan History Tab section.
- 2. In the Edit column on the Loan History Maintenance page, click the Edit icon 💹 corresponding to the Award Year you want to update.

The Loan History Summary Edit page is displayed.

3. In the Edit column on the Loan History Summary Edit page, click the Edit icon 😺 corresponding to the Loan Sequence Number you want to update.



The Loan History Detail Edit page is displayed:

- 4. Edit the data as needed.
- 5. After updating the fields, click one of the save options at the bottom of the page.
  - Save & Edit Next: Saves your work and goes to the next year/session.
  - Save & Edit Previous: Saves your work and goes to the previous year/session.
  - Save & Go Back: Saves your work and goes back to the Financial Aid Data page.
  - Save: Saves your work but does not clear the fields in the Financial Aid Data Create page; data for the saved record is still displayed on the page.

Click the Cancel button if you do not want to save the changes.

6. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

## **10.3 Deleting Loan History Data**

#### To delete loan history data (summary data) for a student

- 1. Begin accessing the loan history data page for the student, as described on the first page of the Loan History Tab section.
- 2. In the Delete column on the Loan History Maintenance page, click the Delete icon 🖾 corresponding to the Award Year you want to delete:

Appli	cation Setup	Student	Pell/Lo	an Processing	Work Study	A	ward Processing	ISIR P	rocessing	Reports	Custom Applications
Stude	nt ID: 999	999999 🔐	ZAPIEN, C	DEANNIE - 99	9999999			Session From:	88 #8	Find	
	Student	Award	Financial Ald	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
								_			
					Loan	History Ma	aintenance	?			
				Stud	ent ID 99999	9999 ZAPIE	N, DEANNIE -	999999999	9		
				Award	Year						
					Jearun				1	5	
			Award Year	Aggregate ( Outstanding	Combined g Balance	DL Master Prom Note	DL PLUS Master Prom Note	NSLDS Loan Default	Edit Dele		
			12	413		N		Y			ete icon

A message is displayed asking you to confirm the deletion:



- 3. Click the OK button to delete the data, or click the Cancel button if you do not want to delete the data.
- 4. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

#### To delete loan history data (detail data) for a student

- 1. Begin accessing the loan history data page for the student, as described on the first page of the Loan History Tab section.
- 2. In the Edit column on the Loan History Maintenance page, click the Edit icon 🕼 corresponding to the Award Year you want to update.

Loan History Summary Edit (?)
Student ID 999999999 ZAPIEN, DEANNIE - 999999999
Award Year 12 Override Load Flag
Pell ID 99999999ZA01
DL Master Prom Note N DL PLUS Master Prom Note N
FFEL Master Prom Note Blank Y FFEL PLUS Master Prom Note Blank
Additional Loan Flag
Subsidized Loan Limit Flag N 💙 Combined Loan Limit Flag
NSLDS Last Transaction Updated 01 NSLDS DB Results Flag 1
NSLDS Loan Default 🗹 Active Bankruptoy Flag 🗌 Payment Arrangement Flag 🗌
Aggregate Combined Outstanding Balance 413 Aggregate Sub Outstanding Balance 413 Aggregate Unsub Outstanding Balance 0
Unallocated Consolidated Outstanding Balance
Aggregate Combined Pending Disbursement 0 Aggregate Sub Pending Disbursement 0 Aggregate Unsub Pending Disbursement 0
Aggregate Combined Total 413 Aggregate Sub Total 413 Aggregate Unsub Total 0
Unallocated Consolidated Total
Perkins Principal Balance 0 Perkins Current Year Amount 0
Save & Edit Next Save & Edit Previous Save & Go Back Save Cancel
Loan Sequence         Grade         Program         Begin Date         End Date         Net         Aggregate         Aggregate Principal         Edit         Delete           Number         Level         Status         Code         Begin Date         End Date         Amount         Principal Balance         Balance Date         Edit         Delete
1 DU SF 09/21/1998 06/09/1999 875 413 06/16/2010 💯 🎜

The Loan History Summary Edit page is displayed:

3. In the Delete column on the Loan History Summary Edit page, click the Delete icon 🖾 corresponding to the Loan Sequence Number you want to delete.

A message is displayed asking you to confirm the deletion:

Windows Internet Explorer	×
Are you sure you want to de	elete?
OK Cancel	

- 4. Click the OK button to delete the data, or click the Cancel button if you do not want to delete the data.
- 5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.