End-User Training
Regent Enterprise
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Overview of Regent Enterprise

The Regent Enterprise system is a web-based Financial Aid Management (FAM) solution for administering financial aid functions. The system is customizable to allow for varying business processes.

Icons

The following icons are seen throughout the Regent Enterprise application:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Insert Icon]</td>
<td>Insert</td>
<td>Add entries</td>
</tr>
<tr>
<td>![Edit Icon]</td>
<td>Edit</td>
<td>Make changes to entries</td>
</tr>
<tr>
<td>![Delete Icon]</td>
<td>Delete</td>
<td>Remove entries</td>
</tr>
<tr>
<td>![Lookup Icon]</td>
<td>Lookup/Validation Table</td>
<td>Controls data that is entered.</td>
</tr>
<tr>
<td>![Calendar Icon]</td>
<td>Calendar</td>
<td>Select dates*</td>
</tr>
<tr>
<td>![Home Icon]</td>
<td>Home</td>
<td>Returns to the main screen</td>
</tr>
<tr>
<td>![Import Icon]</td>
<td>Import</td>
<td>Bring in data into the Regent FAM</td>
</tr>
<tr>
<td>![Verification Icon]</td>
<td>Verification Tool</td>
<td>Access the verifiable fields</td>
</tr>
<tr>
<td>![Print Icon]</td>
<td>Print</td>
<td>Printing</td>
</tr>
<tr>
<td>![Help Icon]</td>
<td>Help</td>
<td>Locate information about the Regent application</td>
</tr>
</tbody>
</table>

*Note: to indicate the current date, type the letter “d” in any date field.*
**FAMHelp**

Integrated help is available throughout the Regent application. Click on the symbol to access the FAM Help. The following screen appears:

There are four levels of FAM Help:

<table>
<thead>
<tr>
<th>Level</th>
<th>Displays…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contents</td>
<td>the entire contents of the FAM Help.</td>
</tr>
<tr>
<td>Application Level Assistance</td>
<td>specific content related to the screen that was displayed when the help was accessed.</td>
</tr>
<tr>
<td>Field Level Assistance</td>
<td>specific database details related to the screen that was displayed when the help was accessed.</td>
</tr>
<tr>
<td>Regent Education Online Support</td>
<td>a login screen to Regent’s Online Support Portal.</td>
</tr>
</tbody>
</table>
**Student Access Bar**

The Student Access Bar is located at the top of the screen in the Regent Enterprise application.

To access a student:

1. Do one of the following:
   - Type in the Student ID in the white text box on the left and then click the “Find” button located on the right.
   - or…
   - Click the (Lookup) button next to Student ID.

2. Type in what information is known.

3. Click the “Search” button.

Notes: “Soundex Search” – if checked – will look up names that “sound like” what was typed.

Select “Session From” and “Session To” to access information only from the specified session(s).
Background Processing

Some tasks that generate output have the option of running “Run”/“Load” or “Schedule as Task”. A program that has the “Schedule as Task” option can be run in the background; this will provide an audit trail of the generated outputs so they can be viewed at any time. Background processing will list tasks that are specific to the user who is logged in.

To view background tasks:

1. Reports 4 Background Tasks

![Background Tasks Table]

One of the following statuses will appear:

- Not Started
- Started
- Finished
- Error
Student Records

Student information is received from the Institution Student Information Record (ISIR) from the Department of Education. From that data, student records are created in the Regent Enterprise system.

At the end of this section, you should be able to:

- Load an ISIR File
- Create FA Student Records using ISIR information
- Manually create and import student records
- View Student Records

Two steps are involved in getting the student data into Regent Enterprise:

1. Loading ISIR File(s).
2. Creating the student(s) in Regent Enterprise using the loaded ISIR File(s).

**Loading ISIR File(s)**

The first step is loading the Institution Student Information Record (ISIR) files that are received from The Department of Education; the loaded ISIR file(s) are placed into a “holding” area in the system.

**To Load an ISIR File:**

1. **ISIR Processing** > Load ISIR

![ISIR File Load](image)

2. **Click the “Browse” button to locate the file to upload.**

3. **Click the “Load” or “Schedule as Task” (preferred) button.**

Notes:

- Only one ISIR file can be uploaded at a time.
- Each upload creates new record(s), which are appended to the existing student information in the database.
Create FA Student Records using ISIRinformation

The second step in getting the student data into Regent Enterprise is to create student records in Regent Enterprise from the loaded ISIR file(s).

Through the setup and configuration done by the System Administrator, the following processes will usually automatically occur:

- Budgets assignments
- Comment Code tracking
- Missing documents assignment
- Packaging plan assignments

To create FA Student Records using the ISIRinformation:

1. ISIR Processing 4  Create FA Students
2. **In the “Date Based” section, select:**
   - Academic Year
   - Institution Code
   - Start Date (include dates that ISIRs were loaded)
   - End Date (include dates that ISIRs were loaded)
   - Due Date for tracking items is pre-selected with the date configured by the system administrator (e.g. 14 days from current date).
   - Do not show errors prior to [date]:
     - Optional.
     - Errors will vary (e.g. school codes don’t match, duplicate records).
     - Date to cut off errors, so the errors won’t appear on the report.

3. **Click “Load” (for immediate action) or “Schedule as a Task” (preferred).**

   **Note:** “Schedule as a Task” is recommended because it allows continuation of other processes; it also provides an audit trail of tasks completed.
Manually Creating and Importing Student Records

Student records can be created and imported manually through two processes:

- adding a student record, or
- creating a student record through the FA Records.

To manually create student records:

1. **Student4 Add New Student**

![Image of Add A New Student wizard]

2. **Enter the following information:**
   - First Name
   - Last Name
   - DOB (date of birth)
   - Either:
     - SSN (Social Security Number) or
     - Student ID (if connected to SIS)

3. **Click the “Next” button.**

   **Note:** The system checks for a match of the student. If there is no student currently in the database, the following message appears:

   ![Image of Add A New Student wizard success message]
4. **Click the “Continue” button.**

5. **Type in additional information.**

6. **Click the “Save” button.**
To manually import student records through the FA Records:

1. ISIR Processing 4  Create FA Student

2. In the “Student Based” section, type in the Student ID, select the Session Start and Session End and then click “Get ISIRs”.

A list of all ISIR records appears.
View Student Records

A student’s record contains information from the ISIRs as well as information input directly into the Regent Enterprise system.

To view a student’s record:

1. Look up the student (see page 3 for instructions).

2. Once in the student’s record, click on the desired tab:

   - Student
   - Award
   - Financial Aid
   - Academic
   - Tracking
   - Comment
   - Activity
   - Loans
   - Loan History
   - Clock Hours
   - ISIR
ISIR Verification Processing

Students are selected for verification by the Central Processing System (CPS). This next section will describe how to perform the verification process in Regent Enterprise.

At the end of this section, you should be able to:
- Satisfy tracking requirements
- Make corrections
- Export corrections
- Run automated packaging

Tracking Requirements

Documents that are assigned when the students are loaded can be satisfied on the individual student record or grouped by tracking item.

If Regent Imaging is enabled, the scanned documents will automatically satisfy the tracking requirements.

To satisfy tracking documents by individual student record:

1. Look up the student using the Student Access Bar (see page 3 for instructions).

2. On the student record, click the “Tracking” tab.

3. Click the (Edit) button on the applicable session start.
4. For each Track Code, select the Date Received and type in any comments.

   Notes: Comment codes may be added automatically if the code is a “C” code from the ISIR.
   You can manually add tracking items – four at a time.

5. Click the “Attach” button to attach any related files (e.g. scanned documents).

To satisfy tracking documents by Tracking Code:

1. Award Processing 4 Tracking Update

2. Click the (Lookup) button to select the Track Code.

3. Click (Lookup) button to select the Session.

4. The Completion Date is pre-filled with the current date; click the (Calendar) button to select another date.
5. **Click the “Enter ID” button.**

6. **Type in the Student ID, or use the (Lookup) button.**

7. **Type in comment, if desired.**

8. **Click the “Save & Edit Next” button to continue with the next student.**

9. **When completed, click the “Save & Go Back” button.**
**Making Corrections**

Data validation is necessary to complete the verification process. The FSA Required Verification Items are displayed for quick modification of data. In addition, all editable ISIR fields can be modified.

**To make corrections:**

1. *Look up the student using the Student Access Bar (see page 3 for instructions).*

2. *On the student record, click the “ISIR” tab.*

![Image of ISIR tab](image)

**Note:** If the Dependency Status is NOT an ‘T’ or ‘D’, then the ISIR was rejected (indicated with an X).
3. Click the 📊 (Verification) tool.

Note: If the student is a dependent, the parent’s information would also be displayed.

4. Make necessary modification to the student record.

5. Optional: click the “Calculate” button to compute the verification tolerance.
Note: As stated on the screen in orange letters, if one of the statements is true, a correction needs to be submitted. This message will appear regardless of whether or not the statements are true.

6. *Click the “Make Corrections” button.*
   The entire ISIR record is displayed for corrections, if necessary.

7. *Click the “Continue” button.*
   The list of ISIR Corrections is displayed.

8. *Click the “Save & Mark for Transmission” button.*
   This will mark the record for export.


Exporting Corrections

Once records are marked for exporting, Regent Enterprise will create a corrections file in the designated format to be processed by COD. The message class for this file is CORRYYIN, where YY represents the two-digit year, e.g. CORR09IN is the 2008-2009 award year.

To create a corrections file for exporting:

1. ISIR Processing 4 Generate Corrections

   ![Generate Corrections File]

   2. Select the following:
      - Transmission Status
      - Dates
      - Institution Code

   3. Click the “Submit” button.

   ![Generate Corrections File]

   4. Click ‘Please click here to download the export file.’
5. Click ‘Save to Disk’.

6. Click the ‘OK button’”, and then select the location (usually a shared location where other COD files are stored).

Notes: Date submitted is the export date.

Once the file is submitted for correction, the file cannot be edited.

A preliminary “e-FAFSA” can be completed to obtain an early estimate for financial aid.
Automated Packaging

The automated packaging is a system process that selects the awards and award amounts automatically, to best meet the student’s financial need and fund levels consistent with institutional resources, and in accordance with award program requirements.

The packaging plans are established prior to running this program. The plans outline the possible awards that the student might receive.

To package a single student:

1. Look up the student using the Student Access Bar (see page 3 for instructions).

2. On the student record, click the “Award” Tab.

3. Click the (Edit) button.

4. Click the “Package” button.

5. Select the Package Code and other criteria.

6. Click the “Package” button.
To package a multiple students:

1. Award Processing 4 Award Packaging
2. Click on “Student Based”.

3. Type in the Student ID or use the Lookup.
4. Look up the Package Code.
5. Click the “Add” button.
6. Repeat for up to 20 students.
7. Click “Get Report” or “Schedule as Task” (preferred).
Batched

Students can be packaged based on:

- School year level or
- Date Required Items Complete

To run a batch award process:

1. Award Processing 4 Award Packaging

2. Click ‘Selection Based’.

3. Select the Institution Code, School Year Level, and Date Required Items Completed.

4. Click the ‘Get Report’ or ‘Schedule As Task’ button (preferred).
Regent Enterprise allows custom letters to be generated to notify students of awards, missing document and other general notifications. Letters can either be emailed or printed and sent through a national letter carrier.

At the end of this section, you should be able to generate:
- Award Letters
- Tracking Letters
- Custom Letters

**Award Letters**

Award letters are generated using a template and other criteria that were created by the system administrator, as described in the System Configuration and Setup Training Manual.

There are many options available for printing letters. Letters may be printed for:
- all students with award data in the selected session
- specific students by ID number
- all students who have had award data updated on a specific date
- all students updated since the last time letters were printed

**To generate an award letter:**

1. **Award Processing 4 Letters4 Awards**

2. *Choose the selection criteria:*
   - Institution and Award Year from the drop-down list
   - One of the following
     - Students that don’t have an award letter
- Students that have award(s) updated on or after their award letter was generated
- Students that had an award letter generated between [dates]
- Students that have award(s) with activity date between [dates]
- The following students
  Enter up to 20 student ID’s separated by commas or spaces

3. **Click the “Browse” button to import the Award Template.**

![Award Template Image]

4. **Select Due Date for Signed Award Letter.**
   
   **Note:** This is a required field.

5. **Email Option:** This is optional. Select “Send via email” and then complete the requested information.

![Email Option Image]

   **Note:** When letters are sent via the Email Option, the letter is sent as an attachment. The Email Body is unformatted text that is created in a text editor.

6. **Address Selection:** alternative address type and code are available for selection if previously configured.

   **Note:** Alternative addresses may include local or permanent addresses.
7. **Select ‘Sort Options’**:
   - Last Name
   - Zip Code
   - Student ID

8. **Click the “Get Letters” or “Schedule As Task” (preferred) button.**
Tracking Letters

Tracking letters are generated using a template that was created by the system administrator.

To generate a tracking letter:

1. Award Processing 4 Letters 4 Tracking

2. Choose the Selection Criteria:
   - Institution Code
   - Session (should be Session start)
   - Choose one of the following:
     - Date Due From and To
     - Date notified
     - Student ID’s, separated by commas
3. **Select the desired Options:**
   - Address Type and Code
     The combination determines what addresses are put on the letter; this may change depending on the time of year.
   - Sort by
     - Zip Code
     - Student Name
     - Student ID
     - Alternative ID
     - SSN
   - Students with the following status will be excluded.
     This status codes are customized by the system administrator during system configuration.

4. **Select Letter Generation Options:**
   - Select the template (select from drop down list)
   - Send via email (check if applicable).
   - Select Email Type and code
     The combination determines what addresses are put on the letter; this may change depending on the time of year.
   - Select Institution Code for Letters.

5. **Click the “Get Letters” or “Schedule Letters As Task” (preferred) button.**
Custom Letters

Custom letters are generated using a template that was created by the system administrator. Letters are can be generated based on various criteria, e.g. Student Status, Award Status, Award Codes). The letter contains the same information to all recipients.

To generate a custom letter:

1. Award Processing 4 Letters4 Labels

![Image of custom letter creation interface]

2. Click the “Browse” button to locate the letter file.

   ![Image of letter file browser]

   Note: the Label Option is not currently available.

3. Select the file and then click the “Open” button.
4. **Select:**
   - Institution Code
   - Institution Code for Printed Address
   - Session Applied
   - Sort Sequence
     - Select Student or Campus
   - Student Status
     - Use the “Add” button for multiple selections
   - Award Status
     - Use the “Add” button for multiple selections
   - Award Codes
     - Use the “Add” button for multiple selections
   - Enter Session Range for Selection
     - Session Begin
     - Session End
   - Email Option (optional)
   - Enter Student ID’s for selection
   - Use the “Add” button for multiple selections
   - Alternate address
     - Leave blank for master address
     - Alternative Address Type
     - Alternative Address Code

5. **Select the “Get Letters” of “Schedule As a Task” (preferred) button.**

   ![Get Letters] [Schedule As Task]
**Disbursement Processing**

The purpose of the disbursement process is to export award data to an external student account system. This process will consist of at least two of the following programs.

At the end of this section, you should be able to perform:

- an Academic Import
- a Pell Reconciliation
- an Hours Reconciliation
- a FAM Disbursement

**Academic Import**

Student academic information can be imported from the student system. The file needs to be in an XML format; the schema is provided by Regent Education.

**To perform an academic import:**

1. **Award Processing 4 Academic Import**

   ![Image of Academic Import Interface](image)

   - Import File
   - Click **Browse** button to locate the file.

2. **Click the “Browse” button to locate the file.**
3. **Click the “Import” button.**

4. **Click the “Yes” button to make changes.**

   Note: The data is added to the Student’s academic tab.
Pell Reconciliation

A Pell table is set up by the System Administrator during system configuration. This table is used to define the number of hours and associate those hours with an enrollment status.

To reconcile the Pell Table:

1. Award Processing 4 Reconciliation 4 Pell

2. Select or type in the requested information:
   - Institution Code
   - Session for Reconciliation
   - Pell Table Code
   - Number of Award Periods
   - Default Hours
   - Rounding Options
     - Round to Whole Dollars
     - Drop Cents
     - Round to Cents
     - Adjust to Whole Dollar Balance
   - Update Award Options
     - Preliminary
     - Final

3. Click the “Get Report” or “Schedule As Task” (preferred) button.
**Hours Reconciliation**

An Hours table is set up by the System Administrator during system configuration. This table is used to adjust all other awards, with the exception of Pell, based on one of the following:

- fixed dollar amount
- percentage of an existing award
- matching another award

**To reconcile the Hours Table:**

1. *Award Processing 4 Reconciliation 4 Hours*

2. **Select:**
   - Institution Code (type or click the button)
   - Session (type or click the button)
   - Hours Table Code (type or click the button)
   - Increase Awards (check or uncheck)
     This allows (or disallows) increasing the award to the maximum as defined by the award detail.
   - Update Awards (Preliminary or Final)

3. **Click the “Get Report” or “Schedule As Task”** (preferred) button.
**FAMDisbursements**

FAM Disbursement provides automatic posting and reconciliation of the financial aid detail with the disbursement detail. The financial aid amounts will be reconciled with any prior disbursements and automatically adjusted to conform to the current financial aid amount to be disbursed.

**To perform FAMDisbursements:**

1. Award Processing 4 Reconciliation 4 FAM Disbursements
2. **Select:**

- Click to select the Institution Code (or leave blank for all)
- Click to select Session Range (Start and End)
- Update Options (Preliminary reports only or final)
- Percentage of Award to be posted (e.g. 100)
- Report Sequence (Student Name or Student ID)
- Minimum Amount for Posting
- Award Programs to be credited to Student Accounts
  - Click to select Award Code
  - Use the “Add” button for multiple selections
- Click to select Student ID’s
  - Use the “Add” button for multiple selections – up to a maximum of 20.
- Click to Select “Date for Date Controlled Disbursements”

3. **Click the “Get Report” or “Schedule As Task” (preferred) button.**
Loan Processing (CommonLine)

The Regent Enterprise CommonLine interface is CommonLine 4 compliant and was designed to be easy to use. This allows the creation of loan records, modifying records, importing response and disbursement rosters within the Regent Enterprise system.

Setup would have been pre-configured by the System Administrator.

At the end of this section, you should be able to:
- Create loan applications for multiple students
- Create loan applications for an individual student
- Edit an Existing Loan Application
- Create a file to export loan applications
- Import a Response File
- Import a Disbursement Roster.

Creating Loan Applications for Multiple Students

Loan applications can be created for multiple students through a batch process.

To create batch loan applications:

1. **Pell Loan 4 Commonline FHEL4 FHELP Auto-create Apps**

   ![Create Loan Application-Batch Process]

   Note: Award Status 1 2 is preconfigured and usually refers to Offered (1) or Accepted (2).
2. Choose the Selection Criteria:
   - Institution Code
   - Award Year
   - Processing Type
     - School certification Request
     - Guarantee loan(s) only
     - Guarantee loan(s) only and print app/promissory note
     - Print app/promissory note and guarantee loan

3. Select Disbursement Details:
   - Disbursement Options
     - Set Disbursement Holds or
     - 30 day delay for first time borrowers
   - Disbursement Funds in ____ days
     - Before start of term or
     - After start of term

4. Click ‘Submit’ or ‘Schedule as Task’ (preferred).

   A report is generated which gives the following information on applications that:

   - are ready to submit.
   - are incomplete.
   - that have failed.
Creating an Individual Loan Application

Loan applications can be created for individual students.

To create a loan application for an individual student:

1. Search for Student ID (see page 3 for instructions).

2. Click on the Loans Tab.

3. Click the (Insert) button.
4. **Select the Loan Type:**
   - Subsidized
   - Unsubsidized
   - PLUS
   - Grad PLUS
   - Alternative (Student)
   - Alternative (Parent)

5. **Select Term Based, and then select session(s) or select Date Based and then select the date(s).**

6. **Indicate Hold Selector:** (check all that apply)
   - Disbursement #1
   - Disbursement #2
   - Disbursement #3
   - Disbursement #4

7. **Select Lender ID from the drop-down list.**

8. **Type or click the button to lookup the Institution Code.**

9. **Click the “Next” button.**
10. Fill out the Loan Application (which contains 111 fields).

![Loan Application Form]

11. Click “Mark for Transmission” button.

![Mark for Transmission Button]

12. Click the “Save” button.
Editing an Existing Loan Application

To Edit an Existing Loan Application:

1. Look up the Student (see page 3 for instructions).

2. Click on the “Loans” Tab

3. Click the (Edit) button.

4. Under “Field Num” 2, select the Value “Correction Application”.

5. Make any corrections.

6. Click “Mark for Transmission” button.

7. Click the “Save” button.
Loan Applications Export

The Loan Applications Export process creates a text file in a Commonline format; this file is then sent to the Lender, guarantor, or servicer (ELM Services)

To create a file to export Loan Applications:

1. Pell Loan 4 Commonline FFELP4 Export Application

2. Type or click the button to lookup the Institution Code.

3. Select either “All Applications” or “Selected Applications”.

4. Select the Servicer from the drop-down menu.
5. **Select the Loan Type from the drop-down menu:**
   - Subsidized
   - Unsubsidized
   - PLUS
   - Grad PLUS
   - Alternative (Student)
   - Alternative (Parent)

6. **Select the Loan Period Start Date.**

7. **Type in the Student IDs (if “Selected Applications” was chosen).**

8. **Select the Year Level from the drop-down menu.**

9. **Click the “Extract” or “Schedule as Task” (preferred) button.**
Response File Import

A response file can be imported.

To Import a Response File:

1. Pell/Loan Processing 4  Commonline FFELP4  Import Response

![Import Response File]

2. Click the “Browse” button to select the Response File to import.

3. Click the ☻ (Calendar) button to select the date.

4. Type in the time (hh:mm).

5. Click the “Import” or “Schedule as Task” (preferred) button.
Disbursement Roster Import

A disbursement roster can be imported.

To Import a Disbursement Roster:

1. **Pell/Loan Processing** 4  **Commonline**  **FFELP4  Import Disb Roster**

2. **Click the “Browse” button to select the Disbursement Roster File to import.**

3. **Select Report Option:**
   - Exceptions Only or
   - All Records

4. **Click the “Load” or “Schedule As Task” (preferred) button.**
Return of Title IV Funds (R2T4)

Title IV withdrawal calculations are based on federal regulations. The calculation is performed for one student at a time, and a report is produced showing the amount of aid to be refunded or disbursed. The option is also provided to allow updating of a student’s awards to reflect the adjusted award amounts.

At the end of this section, you should be able to:

• Perform Title IV withdrawal calculations

Certain conventions must be observed on the Regent Enterprise system data in order for this program to work properly; these conventions are be specified by the System Administrator during setup and configuration.

To perform Title IV withdrawal calculation:

1. Student 4 R2T4

2. Click the Lookup (or type) the Student ID and Session.

3. Click the “Next” button.
4. Click the “Next” button.

5. Click the “Next” button.
6. Click the “Next” button.
7. Click the “Next” button.

---

8. Click the “Cancel”, “Save” or “Get Report” button.
**FAM Reports**  There are approximately 30 reports available in the Regent Enterprise systems.

**Activities Rpt (FAM092)**
This report lists activity codes and their descriptions

**Award Allocations**

The Regent Education financial aid system maintains totals of student awards by award program, by session, and by campus. Occasionally these totals may get out of balance and should be periodically verified by running this verification program. The program will report the totals found, and will update the award totals if they are not correct

**To run the Award Allocations Report:**

1. *Reports 4 Award Allocations*

   ![Verify Totals](image)

   **Session Start**

   **Get Report**

2. Click the ![Lookup](image) icon to select the Session Start.

3. Click the **“Get Report”** button.
Award Audit Report

This program checks all student awards for compliance with awarding requirements in the following areas:

- Award Consistent with Need
- Award Within Budget
- Award Does Not Exceed Career Limits

To run the Award Audit Report:

1. Reports 4 Application Config 4 Award Audit Rpt

2. Click the (Lookup) icon to select the Session.

3. Click the (Lookup) icon to select the Institution Code.

4. Click the “Get Report” button.
Award Disbursements

This report is similar to the Award Inquiry report except that it will display the award amount, disbursed amount, and balance to be disbursed for the session and campus selected. In addition, selection is available on award code or award type and on award status codes. Options are available to show funded or current hours on the report and to display the amount earned in work study as posted in the PAYTIME program.

1. Reports 4 Award Disbursements

2. Select the desired information.

3. Click the “Get Report” or “Schedule As Task” (preferred) button.
Award Inquiry

This program provides the ability to run an inquiry on student awards based on an award type (loans, scholarships, work study, grants, etc.) or on award code.

To run the Award Inquiry Report:

1. Reports 4 Award Inquiry

2. Select the desired information.

3. Click the “Get Report” or “Schedule As Task” (preferred) button.
**Awards Rpt (FAM065)**
This report provides information about award codes in the Financial Aid system, including minimum and maximum award amounts, award type, issuance code, and matching status.

**Award Totals Rpt (FAM025)**
This report provides award totals for the Financial Aid system by award type, session, and campus. Totals can be printed for selected campuses and a selected session range.

**Award Sub Codes Rpt (FAM022)**
This report will print Award Sub Codes and list student’s assigned to a sub code and the amount of the student's award. The student's hours/units and quality point average are shown as well, if on file. Additionally, the award code, award status code, and last activity date for the award will be included.

**Award Summary Rpt (FAM027)**
This program prints a summary for each award program of the amount budgeted, the amount awarded thus far in the award status '1' category (offered awards), the amount awarded thus far in the award status '2' category (accepted awards), and the budget balance once awards in statuses '1' and '2' are deducted. Subtotals are available by program type, i.e. grant, loan, scholarship, work, etc. Grand totals are given for the session range being reported. The report provides a budget summary of award totals in each category as compared to the budget and the balance.
Student Disbursements

This report is run in conjunction with the financial aid reconciliation and is printed automatically during both the preliminary and final reconciliation processes. It shows each student as well as each award and amount for the student and provides a grand total for each student. This would be the amount in which the check would be issued.

To run the Student Disbursements Report:

1. Reports 4 Student Disbursements

   ![Disbursement Report Image]

   Sort on Student ID or Name

2. Click the “Get Report” button.
**FISAP Report**

This program prints parts II-F and VI of the Fiscal Operations Report and Application to Participate (FISAP) required by the Department of Education. The FISAP is due October 1st of each year. A maximum of 50 award codes may be reported at one time. Selections are also available by campus code and session. A variable selection capability is available which permits reporting on specified race, sex, student status, residence, miscellaneous code, or year in school.

1. **Reports 4 FISAP**

![FISAP Report Screen](image)

2. **Select the desired information.**

3. **Click the “Get Report” or “Schedule As Task” (preferred) button.**
Race/Gender Report

1. Select the desired information.

2. Click the “Get Report” button.
Student Inquiry Report

This process produces a listing of student award totals and averages by award code, race, and gender. The report selection permits selection by award code, race, and gender. Selections are also available by institution code, session range, and summary format or student detail format. An unduplicated count is also provided.

To run the Student Inquiry Report:

1. Reports 4  Student Reports 4  Student Inquiry

Note: The report can be run for up to 20 students. For more than two students, the “Schedule As Task” needs to be done.

3. Select the desired information.

4. Click the “Get Report” or “Schedule As Task” (preferred) button.
Stud Processing Stat (FAM075)
This report provides a list of students who have applied for financial aid, i.e. they are on the FAM database but they are in one of various categories

To run the Student Processing Statistics Report:

1. Reports 4 Student Reports 4 Stud Processing Stat

2. Select the desired information.

3. Click the “Get Report” or “Schedule As Task” (preferred) button.
**COD Processing**
(future)

- Pell, ACG, SMART
- TEACH
- Direct Loan

**Federal Work Study Processing**
(Future)

Award Work Study – placed in position. Input hourly rate, post hours. Add role to input hours. Make awards, reporting who is eligible.