



Financial Aid System

***2022-2023
Automatic File Review***

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1 Overview

The Automatic File Review (AFR) process reviews student records in FAM to determine if any students have data in NEED, SMS, or FMS which makes them ineligible to receive aid. AFR generates tracking codes in the specified year/session start, alerting the financial aid staff to possible inconsistencies by displaying informational flags (for the corresponding tracking code) in the Comment field of the FAM Tracking Data Screen. You can then resolve the inconsistencies or have tracking letters automatically sent to the students.

Some examples of informational flags for tracking codes that can be displayed in the Comment field on the Tracking Data screen are:

- If the tracking code is year/session specific, the year/session will appear (for example, C231 or C232).
- If the value for the tracking code is to be posted, a year/session identifier of 1 (Summer), 2 (Fall), 3 (Winter), or 4 (Spring) will precede the value (for example, 1-02).
- If the data associated with the tracking code was found in an SMS detail record rather than an SMS quarterly record, a D will precede the value (for example, D-263).
- For certain parameters (for example, Z-TERMINATED), a relevant comment will be displayed in the Comment field (for example, **Prior Termination**).

Below is an example of the FAM Tracking Data Screen with a flag in the Comment field:

Sample Tracking Tab:

Tracking Data Maintenance ?								
Student ID 555757575 JONES, JUGHEAD - 555757575								
Student Status								
Session C231 SUMMER 22								
Save & Go Back Save Cancel								
Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09	Electronic Student App	01/05/2022			NR		Attach	<input type="checkbox"/>
1L	Welcome Letter	01/05/2022			NR		Attach	<input type="checkbox"/>
AD	HVC Enrollment Services Record	01/05/2022			RQ		Attach	<input type="checkbox"/>
B1	Sponsor Record				NR	C121 C122		<input type="checkbox"/>

BM1628 Year Sessions that have sponsorship data

Automatic File Review is a two-part process.

- First set up the FAM Processing Table Entries.
- Then run SM9354J, the 2022-2023 Automatic File Review job.

In addition, there are other, optional jobs you can run after you have run the AFR job. Information on how to perform all of these activities is provided in this document.

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1.1 Tailoring the Automated File Review Process

Your college can tailor AFR to review specific student populations, such as:

- Students with a tracking code for a specific upload date as posted by Automatic Tracking Posting.
- Students who have specific tracking codes for received documents either optional or required. This eliminates reviewing the records of students who are missing documents and thus have incomplete files.

Optional: If a student has this tracking code (for example TX for IRS 1040), it must have a Date Received date.

Required: A student must have this tracking code (for example DS for Datasheet) and it must have a Date Received date

When determining if a student's record has failed a specific edit, you can also tailor AFR to accommodate your college's specific method of maintaining tracking codes. For example, your college can track:

- Student records that contain a specific tracking code (for example DF for in default) in the tracking history, with or without Date Received dates.
- Student records that contain a specific tracking code (for example RP for owes a repayment) in the tracking history (0000 to current) and are missing Date Received dates.
- Student records that contain a specific tracking code (for example TM for terminated) in the tracking history (0000 to current) and for which the most recent track code is missing the Date Received date.

Your college can also exclude certain students, such as:

- Students who do not currently have a record in SMS.
- Students who have a tracking code that is defined in the FAM Processing table as excluding them from the review process.

Note: The AFR program reviews every eligible student each time you run it. In some cases, the student's data may change after you have performed the initial file review for the year and have made awards to the student. If the student has already received an award, any subsequent edit flags will appear on the Financial Aid Automatic File Review – Awards report (SM9354B).

Understanding and Customizing Date Tracking

The first time a student's record fails an edit after AFR has run, the current date is displayed in the tracking Due Date and Date Notified fields on the Tracking Data page. However, if the student record fails the edit on a subsequent run of AFR, only the Date Notified field is updated. The Due Date field remains unchanged. This allows you to identify the first time and the most recent time that the student failed the edit.

Once a student's record has been reviewed and you have determined that the edit should not be performed again, enter the current date in the Date Received field. AFR will then ignore that edit on subsequent runs. (Note that when you are scheduling the AFR job SM9354J, there is an option to update the Due Date instead of the Date Notified for subsequent runs. For specific information, see section 4.1 "Job Scheduling Parameters for SM9354J")

Reviewing Student Records

AFR allows you to generate separate lists of those reviewed students whose files require a cursory "staff" review and those that require an additional "professional" review. Staff members can then be instructed to:

- Review only students marked with a tracking code for Staff Review (defined as all records not singled out for professional review).
- Review only students marked with a tracking code for Professional Review. (These students are selected by status codes and specific tracking codes you define in a FAM Processing Table).

Dual Processing and Auto File Review

Colleges that are in Dual Processing (finishing out the financial aid year in the Legacy system after being converted to the PeopleSoft system) can use portions of this process. Please refer to the Dual Processing Business Process Guide for further information on using Auto File Review while in Dual Processing.

1.2 Automatic File Review Jobs and Reports

AFR consists of two main jobs that run in Job Group AG934R.

- **SM9354J (22-23 AFR)** which generates the following reports:
Financial Aid Automatic File Review (SM9354A)
Financial Aid Automatic File Review – Awards (SM9354B)
Financial Aid Automatic File Review – Errors (SM9354C)

SM9354J is available stand-alone.

- **SM9142J (Financial Aid Staff AFR)** which generates the following reports:
Files Ready For Professional Review (SM9142A)
Files Ready For Staff Review - File Complete (SM9142B)
Files Ready For Packaging - All Students (SM9142C)

SM9142J is available stand-alone.

The optional jobs or processes that you can run after the AFR jobs have been run are:

- Tracking Letters (See section “Modifying Tracking Letters” in section 4.4)
- SM9146J (Post SM Grade Level to FAID/Credit)
- Preliminary Auto Packaging, Final Auto Packaging: For more information about reports, see the section “AFR Reports” in section 4.2. Documentation on Assigning Packaging Codes will be made available separately from this AFR documentation.

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2 Setting Up Automatic File Review

This chapter contains information about the procedures that you need to complete before you can run AFR, including the reference materials you will need to have at hand before you start and the key value parameters that you need to set up on FAM Processing Table.

Note: In order to run AFR successfully, you must set up the System CIS/Table ID WRV Processing Table and make sure that all key values exist in the table. However, if a key value is related to an edit that is not selected when scheduling an AFR job, you do not need to enter a parameter for that key value.

Also, you can continue to run AFR while in Dual Processing. However, the process can only check for data in FAM. There is also some changes you will need to make to the AFR setup. You can find this information in the FA Dual Processing BPG.

2.1 Checklist for Automatic File Review Setup

Following is a checklist you can use to track your progress during the AFR setup process.

Setup Checklist for AFR

- ❑ **FAM Validation Table (Table Name SAF_TRACK_CODE):** Establish tracking codes for the minimum required setup and each edit you select.
- ❑ **FAM Processing Table (System CIS/Table ID WRV):** For each edit, assign the newly established tracking codes to the corresponding tracking entry key values.

Note: The WRV Table consists of both the tracking entry key values and edit key values. Only those key values that end in TRK apply in this step.
- ❑ **FAM Processing Table (System CIS/Table ID WRV):** From the following list, define the key values for only those edits you want to use when scheduling the AFR job.
 - Agency Sponsor
 - Bachelor's Degree in SM and NEED
 - Eligibility Code (flagged on Student Tab)
 - Estimated Income Information on ISIR
 - High School Diploma or GED
 - In Default On Student Loans
 - Student Intent
 - Invalid Program Enrollment
 - Citizenship
 - Non-Resident Fee Pay Status
 - Owes Repayment
 - Record of Prior College Attendance in SM
 - Record of Financial Aid Probation In Tracking History
 - Record of Financial Aid Termination In Tracking History
 - Veteran's Benefits
 - Wants a Student Loan (per ISIR)
 - Wants Work Study (per ISIR)
- ❑ **Processing Report for System CIS and Table ID WRV:** Print a listing of the values in the WRV table and review it to be sure that all the values have been entered with no typographical errors, even if you are not going to select the edit at run time.
 - ❑ **Navigation:** Reports → Application Config → Processing Rpt

2.2 Preparing for Automatic File Review Setup

Several of the edits that AFR performs require that you define the data values that are acceptable or unacceptable. In order to facilitate this process, have the following information available before beginning setup:

- A list of the current FAM student status codes. To print the list:
Navigation: Reports → Application Config → Validation Rpt
Table Name: SAF_STAT (leave System field blank)

- A list of the current FAM tracking codes. To print the list:
Navigation: Reports → Application Config → Validation Rpt
Table Name: SAF_TRACK_CODE (leave System field blank)

- A list of your college's educational programs and their codes. You can get a list from your Registrar or you can create a DataExpress extract using the SM database and EDUC-PROG-M data set. When creating an extract, make sure your output includes the following fields from EDUC-PROG-M:
 1. EDUC-PROG-CD
 2. DEGREE-TITLE
 3. EDUC-PROG-TITLE
 4. EFF-YRQ-BEG
 5. EFF-YRQ-END

- A list of the citizenship codes, student intent codes, and fee pay status codes. Since these are common to all community and technical colleges in Washington, the current tables are provided in Appendix A.

2.3 Minimum Parameters for Automatic File Review

The following example Table Master shows all key values that must appear in your table in order for AFR to run. At a minimum, you must enter parameters for the values that have been indicated by arrows and have an entry in the Description column. You need to enter the other parameters only if you select the edit that relates to that key value. For more detail on the relationships between scheduling parameters and table setup, see Chapter 3, *Understanding AFR Edit Flags*.

Processing Table Edit

System CIS
Table ID WRV

Short Description

Long Description

Code 1

Code 2

Code 3

Value

Value	Description	Edit	Delete
BA-IN-NEEDTRK			
BA-IN-SMTRK			
CITZINNEEDTRK			
CITZINSM			
CITZINSMTRK			
ELIGSTUINTE			
FILEREVIEWTRK	ttRQ		
INDEFAULTTRK			
INDEFAULTTRK1			
INELIGPRG1			
INELIGPRG2			
INELIGPRG3			
INELIGPRG4			
INELIGPRG5			

INELIGPRG4			
INELIGPRG5			
INELIGPRGTRK1			
INELIGPRGTRK2			
INELIGPRGTRK3			
INELIGPRGTRK4			
INELIGPRGTRK5			
INELIGSTUINTRK			
NOHSGEDTRK			
→ NONEEDRECTRK	ttRQ		
→ NONRESFEEPAYTRK			
→ NOSMSTRK	ttRQ		
NOSMSYRQTRK			
OWESREPAYTRK			
OWESREPAYTRK1			
PARESTINCTRK			
PARLOANTRK			
→ PASSEDALLTRK	ttNR		
PRCOLADMTRK			
PRCOLSMTRK			
PRCOLTRNSFRTRK			
PROBATIONTRK			
→ PROREVIEWTRK	ttRQ		
PROREVIEWTRK1			
PROSTUSTAT			
RESFEEPAY			
SARLOWINCCDS1			
SARLOWINCCDS2			
SARLOWINCCDS3			
SARLOWINCCDS4			
SARLOWINCTRK1			
SARLOWINCTRK2			
SARLOWINCTRK3			
SARLOWINCTRK4			
SPONSORTRK			
STDESTINCTRK			
STDLOANTRK			
TERMTRK			
VETBENINSMTRK			
WORKSTUDYTRK			

2.4 Setting Up FAM Table Master

To set up the FAM Processing Table for the AFR process, you need to complete the following:

- Establish tracking codes (**Validation Table:** Table Name SAF_TRACK_CODE)
- Assign tracking codes (**Processing Table:** System CIS/Table ID WRV)
- Define edits (**Processing Table:** System CIS/Table ID WRV)

Establishing Tracking Codes in the FAM Validation Table

Before you can run AFR successfully, you must establish several table values. Use the following guidelines:

- When establishing AFR tracking codes, review the Validation Report for SAF_TRACK_CODE
Navigation: Reports → Application Config → Validation Rpt
- Note any tracking codes currently in use that you can use when establishing new codes. Since you are using these codes to flag an edit that was triggered in AFR, it may not be appropriate to use some current codes.
- For the remaining edits, establish new tracking codes using the following model. In this example, the codes F0 through FV were used but each college can choose the sequence that works best for that college.

Validation Table /Table Name SAF_TRACK_CODE	
Sample Tracking Code	Description
F0	HAS BACHELOR'S DEGREE IN NEED
F1	HAS BACHELOR'S DEGREE IN SM
F2	CITIZENSHIP IN NEED INELIGIBLE
F3	CITIZENSHIP IN SM INELIGIBLE
F4	FILE REVIEW
F5	IN DEFAULT PER TRACKING HISTORY
F6	INELIGIBLE PROGRAM ENROLLED
F7	INELIGIBLE PROGRAM ENROLLED 2
F8	INELIGIBLE PROGRAM ENROLLED 3
F9	INELIGIBLE PROGRAM ENROLLED 4
FA	INELIGIBLE PROGRAM ENROLLED 5
FB	INELIGIBLE STUDENT INTENT
FC	VERIFY HS DIPLOMA/GED CERTIFICATE

Validation Table /Table Name SAF_TRACK_CODE	
Sample Tracking Code	Description
FD	NO RECORD IN NEED DATABASE
FE	STUDENT FEE PAY STATUS NOT RESIDENT
FF	NO RECORD IN STUDENT SYSTEM
FG	NO RECORD IN STUDENT SYSTEM FOR YR/SES
FH	OWES REPAYMENT PER TRACKING HISTORY
FI	PARENT INCOME ESTIMATED
FJ	WANTS PARENT PLUS LOAN
FK	PASSED ALL EDITS
FL	PRIOR COLLEGES ATTENDED IN ADMISSIONS
FM	PRIOR COLLEGES ATTENDED IN REGISTRATION
FN	PRIOR COLLEGES ATTENDED IN TRANSFER
FO	FINANCIAL AID PROBATION PER TRACKING HISTORY
FP	PROFESSIONAL REVIEW
FQ	AWARD IN SPONSORSHIP MODULE
FR	STUDENT INCOME ESTIMATED
FS	STUDENT WANTS LOAN
FT	TERMINATED FROM FINANCIAL AID PER TRACKING HISTORY
FU	VETERANS BENEFITS IN REGISTRATION
FV	WANTS WORK-STUDY

Assigning Tracking Codes in the FAM Processing Table (System CIS/Table ID WRV)

On the Processing Table for System CIS/Table ID WRV, assign a tracking code and status to the Values that correspond to the tracking entries entered in SAF_TRACKING_CODE on the Validation Table. The AFR process will use these codes to determine which tracking code to post for each edit. A one-time update has already been run at your college to create the WRV items. You will only need to update the Description/Parameter Values field with the tracking code and status. If you made changes to a tracking code you chose in SAF_TRACKING_CODE, make the corresponding change for using that tracking code in the WRV table.

Note: The WRV table contains key values for both tracking entries and edits with blank Description/Parameter Values fields. At this stage, work with the key values for tracking entries only as specifically listed below. The following section in this documentation will direct you to complete the key values for edits.

In this table, the codes F0 through FV were used as examples; however, each college can choose the sequence that works best for that college. The “Source Screen” column in the table refers to the online screen in FAM, SMS, or FMS on which the data being edited is displayed. In SMS, some data is stored on the student's quarterly record (STU-YRQ-M) and also on the student's master record (STU-D). If, for the session range specified, no data was found for the student in STU-YRQ-M, the master record is used. The STU-YRQ-M data is displayed on the Student Quarterly Data screen (SM5017), and the STU-D data is displayed on the Admissions screen (SM2001).

Note: In the following table, some of the key values have been revised or deleted.

FAM Processing Table Entries (System CIS /Table ID WRV)			
Value	Sample Description	Track Code and Status Posted When Student's Data Triggers an Edit	Source Screen for Student Data
BA-IN-NEEDTRK	F0RQ	Bachelor degree in NEED.	FAM: ISIR Tab
BA-IN-SMTRK	F1RQ	Bachelor degree in SMS.	SMS: SM2001
CITZINNEEDTRK	F2RQ	Invalid citizenship in NEED.	FAM: ISIR Tab
CITZINSMTRK	F3RQ	Invalid citizenship in SMS.	SMS: SM5017 SMS: SM2001
ELIGIBLECDETRK	FMRQ	Academic Eligibility Flag on Student Tab	FAM: Student Tab
FILEREVIEWTRK	F4RQ	File Ready for Review	
INDEFAULTTRK	F5RQ	In default on a loan.	FAM: Tracking Tab
INELIGPRGTRK	F6RQ	Enrolled in a program listed in INELIGPRG1 through INELIGPRG5.	SMS: SM5017, SM700A SMS: SM2001
INELIGPRGTRK2	F7RQ	Enrolled in a program listed in INELIGPRG2.	

FAM Processing Table Entries (System CIS /Table ID WRV)			
Value	Sample Description	Track Code and Status Posted When Student's Data Triggers an Edit	Source Screen for Student Data
INELIGPRGTRK3	F8RQ	Enrolled in a program listed in INELIGPRG3.	
INELIGPRGTRK4	F9RQ	Enrolled in a program listed in INELIGPRG4.	
INELIGPRGTRK5	FARQ	Enrolled in a program listed in INELIGPRG5.	
INELIGPRGTRK6 through INELIGPRGTRK9	FDRQ	Enrolled in a program listed in INELIGPRG6 through INELIGPRG9	
INELIGSTUINTRK	FBRQ	Ineligible student intent.	SMS: SM5017
NOHSGEDTRK	FCRQ	No high school diploma or GED.	FAM ISIR Tab
NONEEDRECTRK	FDRQ	No record in NEED.	FAM ISIR Tab
NONRESFEEPAYTRK	FERQ	Student is not paying resident tuition.	SMS: SM5017 SMS: SM2001
NOSMSTRK	FFRQ	No record in SMS.	SMS: SM2001
NOSMSYRQTRK	FGRQ	No record in SMS for the year/session range.	SMS: SM5017
OWESREPAYTRK	FHRQ	Owes a repayment.	FAM: Tracking Tab
PARESTINCTRK	FIRQ	Parent income is estimated.	FAM: ISIR Tab
PASSEDALLTRK	FKNR	Passed all edits.	
PRCOLADMTRK	FLRQ	Prior college(s) in admissions.	SMS: SD5031
PRCOLSMTRK	FMRQ	Prior college(s) in SMS.	SMS: SM2001
PRCOLTRNSFRTRK	FNRQ	Prior college(s) in transfer.	SMS: SD3005
PROBATIONTRK	FORQ	Shows prior financial aid probation.	FAM: Tracking Tab
PROREVIEWTRK	FPRQ	Ready for Professional Review.	
SPONSORTRK	FQRQ	Award in sponsorship module.	FMS: BM1628
STDESTINCTRK	FRRQ	Student's income is estimated.	FAM: ISIR Tab
TERMTRK	FTRQ	Shows prior termination from aid.	FAM: Tracking Tab
VETBENINSMTRK	FURQ	Veterans benefits in SMS.	SMS: SM2001
WORKSTUDYTRK	FVNR	Interested in work-study.	FAM: ISIR Tab

Note: the entry of SAF057-FAF-TRK needs to exist on your SAF/AGENCY table. It also exists on the SAF/TRACKAUTO table. It needs to be on both SAF/AGENCY and SAF/TRACKAUTO tables. Do not remove this entry from the SAF/TRACKAUTO table. Make sure the Track Code entered in the description is the same for both entries on both tables.

Defining Edits in FAM Processing Table (System CIS/Table ID WRV)

If a key value in the FAM Processing Table (System CIS/Table ID WRV) is missing or mistyped, the AFR job (SM9354J) will not complete successfully and the Errors Report (SM9354C) will be printed, listing the incorrect key values. Below is a table listing the correct key values and parameters for the FAM Processing Table (System CIS/Table ID WRV). Note most of these WRV items have already been added to your table with generic Values and blank Descriptions. You will need to update the Description/Values field. However, you will need to enter the value EXCLUDETRK-CDES (the italicized item in the table), if you want to exclude students by specific tracking codes.

FAM Processing Table (System CIS/Table ID WRV)		
Value	Sample Description	Explanation
CITZINSM	B1B2E1E2H2K1K2L1 L2T ZZ Note: Since T is a single-character code, a space is left after it to allow for the 2-character field length.	Up to 20 citizenship codes used in SMS that are not valid for financial aid recipients. Do not separate the codes with a comma or a space (see the exception Note in the Parameter column). Use the citizenship codes you highlighted in the Setup Reference Tables.
ELIGSTUINTE	ABFG	Up to 20 student intent codes used in SMS that are valid for financial aid recipients. Do not separate the codes with a comma or a space. Use the student intent codes you highlighted in the Setup Reference Tables.
EXCLUDETRK-CDES	LLNNNPIA	Up to 20 tracking codes used to determine that a student is inactive and should not be reviewed. Do not separate the codes with a comma or a space. You may choose to exclude students from AFR that are terminated, have the “no need” tracking code, or any other tracking code which should exclude them from the review process.
INDEFAULTTRK1	DFIDZZ	Up to 20 tracking codes for students in default on a student loan. Do not separate the codes with a comma or a space. The program will search for these tracking codes in the student's entire history from session 0000 through current.
INELIGPRG1 INELIGPRG2 INELIGPRG3 INELIGPRG4 INELIGPRG5 (the above are required to be on the Processing Table) INELIGPRG6	0,0008,010,JUAN	Up to 10 program codes per key value line that are not valid for financial aid recipients. Separate the codes with a comma. Note: additional lines will be added in the future. For a complete listing of program codes, you can create a DataExpress report to extract all program codes in your college's tables. See the instructions in the Preparations Before Setup section on writing and reading these program codes.

FAM Processing Table (System CIS/Table ID WRV)		
Value	Sample Description	Explanation
INELGPRG7 INELGRPG8 INELGRPG9 (optional)		
OWESREPAYTRK1	OWZR	Up to 20 tracking codes indicating that the student owes a repayment. Do not separate the codes with a comma or space.
PROBATIONTRK1	PB	Up to 20 tracking codes indicating the student has a probation tracking code from a prior session in the student's financial aid tracking history. Do not separate the codes with a comma or space.
PROREVIEWTRK1 PROREVIEWTRK2 PROREVIEWTRK3	DFS1S2S350Z5Z7Z8	Up to 20 tracking codes per key value line indicating the student is in verification and should be reviewed by a professional staff member. Do not separate the codes with a comma or space. It is recommended that you specify tracking codes that would flag a student for professional review. These tracking codes refer to, for example, default, repayment, tracking items generated by the comment code from the ISIR, verification items, and so forth.
PROSTUSTAT	DFOV	Up to 20 student status codes indicating the student should be reviewed by a professional staff member. Do not separate the codes with a comma or space. Specifically, these are students with federal rejects and have been posted in FAM with an OV status code.
RESFEEPAY	01261823454858	Up to 20 fee pay status codes indicating the student is paying resident tuition. Do not separate the codes with a comma or space. Use the Fee Pay Status codes highlighted from the Setup Reference Tables section.
TERMTRK1	TMTETR	Up to 20 tracking codes indicating the student has a termination tracking code from a prior session in the student's financial aid tracking history. Do not separate the codes with a comma or space.

Note: the following values are no longer valid. You may delete them from your Processing table if they exist.

SARLOWINCCDS1
SARLOWINCCDS2
SARLOWINCCDS3
SARLOWINCCDS4
PARLOANTRK
STDLOANTRK

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3 Understanding AFR Edit Flags

This chapter reviews all of the edit flags generated by the Automatic File Review process. In order to better understand the flags, each one is listed separately with:

- Key value for the tracking code generated by the AFR program
- Key values for the data the AFR program should look for
- Job scheduling parameters
- Sample screens where data resides

If you are running AFR for the first time, this will allow you to view each option separately so you can decide which portions of the AFR program you would like to begin using. As always, though, you must define the tracking code in FAM Validation Table (Table Name SAF_TRACKING_CODE) prior to using it in your table setup.

The AFR program does have some key values that you must enter regardless of which edit flags you set up to review. At a minimum, you must enter parameters for the following key values into your FAM Processing Table (System CIS/Table ID WRV):

WRV Value	Description
FILEREVIEWTRK	Enter the tracking code for students who do not require professional review. Typically, students who are not in verification and who do not have tracking items or a student status that you defined as requiring special attention.
NONEEDRECTRK	Enter the tracking code for students who do not have a record in NEED22.
NOSMSTRK	Enter the tracking code for students who do not have any record in SMS. If you use the AD tracking code as part of your automatic tracking posting and would like to suppress this entry, you can setup the parameter across from this key value as ADRQ. It will only not generate an extra tracking item; however, it will appear on the AFR report. Note: to post this track code make sure the Description is 'Y' for WRV Value SM9032-IGNOR-SM if this entry exists on your Processing Table.
NOSMSYRQTRK	Enter the tracking code for students who do not have a year/quarter record in SMS for any of the year/sessions specified. You can use the AD tracking code in this parameter also.
PASSEDALLTRK	Enter the tracking code for students who passed all edits.
PROREVIEWTRK	Enter the tracking code for students who require professional review. Typically this will be your students requiring verification, but, if you choose to add more tracking codes that would flag a student as requiring a professional review you will also need to enter a parameter for the key value PROREVIEWTRK1, PROREVIEWTRK2 and PROREVIEWTRK3.

3.1 Editing for Agency Sponsor

The edit for Agency Sponsors will generate a tracking entry on the Tracking Tab if the student has sponsorships on the Third Party Sponsorship Screen (BM1628 in FMS) in the year/session range specified (for example, C231 through C124).

To use the edit for Agency Sponsors

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value SPONSORTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-AGENCY-SPONSOR, enter Y (Yes, do this edit).

If a student has a sponsorship in the year/session range specified, then the tracking code will be generated in the Tracking tab, and the year/sessions will be posted to the Comment field.

Sample: Third Party Sponsorship Screen (BM1628)

SPONSOR ID / NAME		YRS	AMT/PERC/ INDICATOR	EDIT STAT	EXC IND	FEE CLASSES	AMT USED/ BALANCE
[FRIDAYSCH] [O] [C011]	FRIDAY SCHOLARSHIP	[500.00]A	[A]	[]	[.00]
[FRIDAYSCH] [O] [C012]	FRIDAY SCHOLARSHIP	[500.00]A	[A]	[]	[.00]
			#				500.00]

Sponsorship codes on BM1628

Sample: Third Party Sponsorship Code on Tracking Data Tab

AD	HVC Enrollment Services Record	12/18/2020			RQ	
B1	Sponsor Record				NR	C011 C012

Year/sessions in BM1628 with sponsorship data

3.2 Editing for Bachelor's Degree

The edit for Bachelor's Degree will generate a tracking entry if the student has a record in NEED or SMS indicating that the student has a bachelor's degree.

- In NEED22, AFR only looks for a response of **1** (yes) to the question “First bachelor's degree by July 1, 2021?” AFR does not search for year in school or graduate/professional flags.
- In SMS, AFR looks for a **Y** (yes) in the BA Grad field on the Admissions Screen (SM2001). AFR does not search for a Y (yes) in the Prev Col 1 or Prev Col 2 fields.

Sample: Bachelor's Degree in ISIR Tab

34. First Bachelor's Degree By 07-01-2021?	2
35. Grade Level in College	0
36. Degree/Certificate	4
37. Interested in receiving Work-Study?	2

Sample: Bachelor's Degree on SMS Admissions Screen (SM2001)

```

SM2001-008                ADMISSIONS                U T
SID.. [999][99][9999]
Branch..... [LQ]          YRQ Plan Strt. [C231]      Stu Prg Appl.. [SPSS]
Time Pref.... [2]         Adm Num..... [BBBBB]      App Rcpt Date. [12/07/21]
Adv Id..... [ROGL]       Sex..... [M]           Birth Date.... [12/31/99]

Stu Name..... [DUCK DON Q          ]
Prev Name..... [DUCK DON          ]      Prev Name 2.. [LUCK          ]
Stu Street.... [1234 DUCKBUSH DRIVE  ]      Stu City..... [BELLYVIEW          ]
Stu St..... [AB]           Stu Zip..... [98004          ]
Stu Day Phone. [555][666][7777]      Stu Eve Phone [555][803][9999]

Census Race Cd [608]      Census Hisp Cd [717]      Eth Orig..... [4]
Citz Stat. [RF]   Res Stat..... [1]   Fee Pay Stat.. [22]   Vet Bene... [ ]

Hi Schl.. [282] Hi Schl Last Yr [79] Hi Schl Grad... [Y] Hi Schl Tran... [ ]
Prev Col 1 [190] Prev Col Yr 1.. [85] Prev Col Grad 1 [Y] Prev Col Tran 1 [ ]
Prev Col 2 [ ] Prev Col Yr 2.. [ ] Prev Col Grad 2 [ ] Prev Col Tran 2 [ ]

Trnsfr Col Cr [ ] Stu Typ.... [ ] Adm Stat.... [ ] Reg Deposit Ind [ ]
BA Grad..... [Y]   Rec Fee Ind [ ] Stu Enr Stat [ ] DSS..... [ ]
    
```

To use the edit for Bachelor's Degree

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the values BA-IN-NEEDTRK and BA-IN-SMTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameters Z-DEG-NEED and Z-BA-DEG-SM, enter **Y** (Yes, do this edit).

3.3 Editing for Eligibility Code

If your college uses the academic eligibility codes, the edit for Eligibility Code will generate a tracking entry if the student has an ineligible flag on the Student Data tab.

Sample: Eligibility Field on Student Data Tab

Student Data

Student ID and Name

Student ID 555757575	Alternate ID <input type="text"/>	DOB 04/10/1998
Last Name JONES	First Name JUGHEAD	Middle Name <input type="text"/>
Informal Name <input type="text"/>	Title <input type="text"/>	Prefix <input type="text"/> Suffix <input type="text"/>

Address, Email and Telephone

Address 721 PARK LANE	Address 2 <input type="text"/>
Address 3 <input type="text"/>	Address 4 <input type="text"/>
City ENUMCLAW	State WA
Zip 98022	Country <input type="text"/>
Email Address <input type="text"/>	
Phone 1 <input type="text"/>	Phone 2 <input type="text"/> Fax <input type="text"/>

Financial Aid Data

Grad. Date <input type="text"/>	Student Status <input type="text"/>	State Residence WA	Institution Code 01	Session Applied C231
Sess Rem 0.00	Eligible Code A1	Eligible Session <input type="text"/>	Session Start <input type="text"/>	Session End <input type="text"/>

The effect of the eligibility code that appears on the Student Data tab is controlled by the values set up on FAM Validation Table (Table Name SAF_ELIG_CODE). This entry can only be modified by SBCTC-IT.

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Sample: Eligibility Codes on FAM Validation Table (Table Name SAF_ELIG_CODE)

Validation Table Detail ?

Table Name SAF_ELIG_CODE
 Field Required N
 Description ELIG CODE
 Default Value
 Field Label
 Default Number 0
 Validation Table
 Default Date
 Table Type T
 Database Table Type
 Maximum Value Length 2
 COCO Only Flag Y
 Note ss

Value	Short Description	Long Description
	Blank	Intentional Blank
A0	@	
A1	*	
A2	*	
A3	*	
A4	*	
A5	*	
A7	*	
AA	@	

The values defined with an @ indicate a student is eligible for all awards. They values defined with an asterisk (*) indicate a student is ineligible for all awards. A tracking entry will be generated for students whose records have a value with an asterisk.

To use the edit for Eligibility Code

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value ELIGIBLECDETRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-ELIGIBILITY-CD, enter Y (Yes, do this edit).

3.4 Editing for Estimated Income Information on ISIR

You have the option for editing for the estimated income for students or parents or both.

Editing for Estimated Income for Student

The edit for Estimated Income will generate a tracking entry if question 39 on the ISIR Tab has an entry of 2 (will file a Tax Return).

Sample: “Completed a Tax Return” Code on ISIR Tab - Student Estimated Income

39.	Student's Tax Return Completed?	2
40.	Student's Type of 2019 Tax Form Used?	1
41.	Student's Tax Return Filing Status	2

To use the edit for Estimated Income for Student

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value STDESTINCTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-EST-INC-STU, enter **Y** (Yes, do this edit).

Editing for Estimated Income for Parent

The edit for Estimated Income will generate a tracking entry if question 103 on the ISIR Tab has an entry of 2 (will file a Tax Return).

Sample: “Completed a Tax Return” Code on ISIR Tab - Parent Estimated Income

101.	Parents' Tax Return Completed?	2
102.	Parents' Type of 2019 Tax Form Used?	1
103.	Parents' Tax Return Filing Status	2

To use the edit for Estimated Income for Parent

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value PARESTINCTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-EST-INC-PAR, enter **Y** (Yes, do this edit).

3.5 Editing for High School Diploma or GED

The edit for High School Diploma or GED will generate a tracking entry if question 29 on the ISIR Tab indicates that the student did not earn a diploma or GED before the first date of enrollment. If selected the edit will post the tracking entry if the value on the ISIR is 4 (None of the Above) or Blank. The AFR program currently does not check the Admissions Screen (SM2001) for high school completion.

Sample: No High School or GED on ISIR Tab

27.	Parent 1 Highest Grade Level Completed	2
28.	Parent 2 Highest Grade Level Completed	2
29.	HS Diploma or Equivalent	4

To use the edit for High School Diploma

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value NOHSGEDTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-HS-GED, enter Y (Yes, do this edit).

3.6 Editing for In Default On Student Loan

The edit for In Default on Student Loan will generate a tracking entry if the student has an In Default tracking code (for example, DF) on Tracking Data Tab (for example, 0000 to C235).

Sample: In Default on Student Loan in Tracking Data Tab



CO	Conditions of Award	12/18/2020			NR	
DF	DEFAULTED ON STUDENT LOAN	12/28/2020			RQ	

Depending on how you define the selection process when scheduling job SM9354J, AFR will search for:

- Any tracking code, or
- Only those tracking codes without Date Received dates, or
- A tracking code which has the most recent due date but which does not have a Date Received

To use the edit for In Default on Student Loan

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value INDEFAULTTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key value INDEFAULTTRK1, enter the valid tracking code that the AFR program will search for in the student's tracking history.
- 3 When scheduling the AFR job (SM9354J), for parameter Z-IN-DEFAULT-ED, enter Y (Yes, do this edit).
- 4 When scheduling the AFR job (SM9354J), for parameter SEL-INDEFAULT-OPT, enter 1, 2, or 3 to indicate the following:
 - 1 Any default tracking code will cause the edit to fail, whether or not the record has a Date Received date.
 - 2 Any default tracking code without a Date Received date will cause the edit to fail.
 - 3 If the most recent (by due date) tracking code does not have a Date Received date, the edit will fail.

3.7 Editing for Student Intent

The edit for Student Intent will generate a tracking entry if the student has an invalid student intent code in the Student Quarterly Data screen (SM5017) in the year/session range for which the AFR job is scheduled (for example, C231 to C124).

Sample: Invalid Student Intent on Student Quarterly Data Screen (SM5017)

SM5017-006		STUDENT QUARTERLY DATA			U		YRQ [C232]	
SID.. [999][99][9999]				Stu Name... [DUCK DON Q]				
Stu Int.... [D]		Stu Prg Enr []		Stu Typ..... []				
Res Stat... [1]		Citz Stat.. [RF]		Fee Pay Stat. [01]				
Vet Bene... []		Concurr Enr []		Reg Actv Date [06/06/16]				
Qtr GPA Cr. []		Qtr Cr Earn []		Qtr Cr Reg... [7.0]				
Qtr GPA Hr. []		Qtr Hr Earn []		Qtr Hr Reg... []				
Itm	Dept	Course	Add	Drop	Enr	Gr	Reg	Fee
Num	Div	Num	Date	Date	Cr	Cr	Gr	Qual Flag Pay
7878	AGVET	101	06/05/22		02.0	02.0	*	O
6000	HIST	101	06/16/22		05.0	05.0	*	O

Sample: Invalid Student Intent on Enrollment Matrix Screen (SM5018)

(with intent data from Student Quarterly Data Screen, SM5017)

SM5018-006		ENROLLMENT MATRIX			U		
SID... [999][99][9999]				Stu Name... [DUCK DON Q]			
Cum GPA Cr..... []		Cum Cr Earn..... []		Cum GPA.... []			
Clvl GPA Cr.... []		Clvl Cr Earn.... []		Clvl GPA... []			
Cum GPA Hr..... []		Cum Hr Earn..... []					
Unusual Action							
[12][]	[]	[]	[]	[]	[]	[]	[]
	Stu	Fee	Qtr	Qtr	Qtr	Qtr	
	Pr	Pay	Cr	GPA	Cr	Cr	
YRQ	Int	Enr	Stat	Stat	Stat	Typ	Bene
[C232]	[D]	[]	[1]	[]	[01]	[]	[]
[B671]	[D]	[]	[1]	[]	[01]	[]	[]
[B454]	[B]	[]	[1]	[RF]	[01]	[]	[7.0]
[B453]	[B]	[]	[1]	[Y]	[01]	[]	[]

To use the edit for Student Intent

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value INELIGSTUINTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key value ELIGSTUINTE, enter the valid student intent codes that the AFR program will search for in the Student Quarterly Data screen (SM5017).
Sample valid student intent codes might be A, B, F, G, I or M. Do not use spaces or commas when adding these codes to the table.
- 3 When scheduling the AFR job (SM9354J), for parameter Z-INVALID-INTENT, enter Y (Yes, do this edit).

3.8 Editing for Invalid Program Enrollment

The edit for Invalid Program Enrollment will generate a tracking entry if the student has an invalid program enrollment code in the Student Quarterly Data Screen (SM5017) in the year/session range for which the job is scheduled (for example, C231 to C124).

Sample: Invalid Program Enrollment Code on Student Quarterly Data Screen (SM5017)

SM5017-006	STUDENT	QUARTERLY	DATA	U	YRQ [C232]			
SID.. [999][99][9999]					Stu Name... [DUCK DON Q]			
Stu Int.... [D]	Stu Prg Enr [989F]	Stu Typ..... []						
Res Stat... [1]	Citz Stat.. [RF]	Fee Pay Stat. [01]						
Vet Bene... []	Concurr Enr []	Reg Actv Date [06/05/18]						
Qtr GPA Cr. []	Qtr Cr Earn []	Qtr Cr Reg... [7.0]						
Qtr GPA Hr. []	Qtr Hr Earn []	Qtr Hr Reg... []						
Itm	Dept	Course	Add	Drop	Enr	Gr	Reg	Fee
Num	Div	Num	Date	Date	Cr	Cr	Gr	Qual Flag Pay
7878	AGVET	101	06/05/22		02.0	02.0	*	0
6000	HIST	101	06/16/22		05.0	05.0	*	0

To use the edit for Invalid Program Enrollment

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value INELIGPRGTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key values INELIGPRG1, INELIGPRG2, INELIGPRG3, INELIGPRG4 or INELIGPRG5 (INELIGPRG6 through INELIGPRG9 are optional entries), enter the invalid program enrollment codes that the AFR program will search for in the student’s quarterly record on the Student Quarterly Data screen (SM5017).

If you are unsure which program enrollment codes apply to your college, check with your Registrar or create a DataExpress procedure to extract a listing of enrollment codes from the EDUC-PROG-M data set. (For more information, see the following section “To Create a DataExpress Procedure for Program Enrollment Codes.”)

- 3 When scheduling the AFR job (SM9354J), for parameter Z-INVALID-PROG, enter **Y** (Yes, do this edit).

To create a DataExpress procedure for program enrollment codes

To obtain a list of your college's educational programs and their codes, you can create a DataExpress extract using the EDUC-PRG-M data set in the SM database.

To create an extract using the EDUC-PRG-M data set, make sure that your procedure output includes the following fields:

- EDUC-PROG-CD (Educational Program Code)
- DEGREE-TITLE
- EDUC-PROG-TITLE (Educational Program Title)
- EFF-YRQ-BEG (Effective Year/Quarter Begin Date)
- EFF-YRQ-END (Effective Year/Quarter End Date)

Sample: Fields in the EDUC-PRG-M Data Set as Displayed in DataExpress

Data Express Center		
Data fields in MASTER data set EDUC-PRG-M		
1: *EDUC-PRG-CD	5: EFF-YRQ-BEG	9: INSTRN-CAL-CD
2: DEGREE-TITLE	6: EFF-YRQ-END	10: EDUC-PRG-MISC
3: EDUC-PRG-TITLE	7: PRG-HR	
4: EXIT-CD	8: PRG-HR-DAY	

3.9 Editing for Citizenship

You can set up AFR to edit for a student's citizenship status as it is stored in either the NEED or SM databases.

Editing for Citizenship in NEED

The edit for Citizenship in NEED will generate a tracking entry if the student has a citizenship code of 2 (non-citizen) or 3 (neither 1 nor 2) and therefore not eligible per the ISIR record layout as stored in NEED22.

Sample: Non-Citizen Code on ISIR Tab

15.	Student's Driver's License State Code	WA
16.	Student's E-mail Address	
17.	Student's Citizenship Status	2

To use the edit for Citizenship in NEED

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value CITZINNEEDTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-NON-CITZ-NEED, enter Y (Yes, do this edit).

Editing for Citizenship in SM

The edit for Citizenship in SM will generate a tracking entry if the student has an invalid citizenship code in the Student Quarterly Data (SM5017) or Admissions (SM2001) screens.

Sample: Non-Citizen Code on Student Quarterly Data Screen (SM5017)

SM5017-006		STUDENT QUARTERLY DATA		U	YRQ [C232]			
SID.. [999][99][9999]		Stu Name... [DUCK DON Q]						
Stu Int.... []	Stu Prg Enr []	Stu Typ..... []						
Res Stat... [1]	Citz Stat.. [B2]	Fee Pay Stat. [01]						
Vet Bene... []	Concurr Enr []	Reg Actv Date [04/02/18]						
Qtr GPA Cr. []	Qtr Cr Earn []	Qtr Cr Reg... [5.0]						
Qtr GPA Hr. []	Qtr Hr Earn []	Qtr Hr Reg... []						
Itn	Dept	Course	Add	Drop	Enr	Gr	Reg	Fee
Num	Div	Num	Date	Date	Cr	Cr	Gr	Qual
4444	BOOC	217	04/02/22		05.0	05.0	*	Flag Pay

Sample: Non-Citizen Code on Admissions Screen (SM2001)

SM2001-008		ADMISSIONS		U	T
SID.. [999][99][9999]					
Branch..... [LQ]	YRQ Plan Strt. [C231]	Stu Prg Appl.. [SPSS]			
Time Pref..... [2]	Adm Num..... [BBBBB]	App Rcpt Date. [12/07/21]			
Adv Id..... [ROGL]	Sex..... [M]	Birth Date.... [12/31/69]			
Stu Name..... [DUCK DON Q]					
Prev Name.... [DUCK DON]		Prev Name 2.. [LUCK]			
Stu Street.... [1234 DUCKBUSH DRIVE]		Stu City..... [BELLYVIEW]			
Stu St..... [AB]		Stu Zip..... [98004]			
Stu Day Phone. [555][666][7777]		Stu Eve Phone [555][803][9999]			
Census Race Cd [608]	Census Hisp Cd [717]	Eth Orig..... [4]			
Citz Stat. [B2]	Res Stat..... [1]	Fee Pay Stat.. [01]		Vet Bene... []	
Hi Schl.. [282]	Hi Schl Last Yr [79]	Hi Schl Grad... [Y]	Hi Schl Tran... []		
Prev Col 1 [190]	Prev Col Yr 1.. [01]	Prev Col Grad 1 [Y]	Prev Col Tran 1 []		
Prev Col 2 []	Prev Col Yr 2.. []	Prev Col Grad 2 []	Prev Col Tran 2 []		
Transfr Col Cr [5.0]	Stu Typ.... []	Adm Stat.... []	Reg Deposit Ind []		
BA Grad..... [Y]	Rec Fee Ind []	Stu Enr Stat []	DSS..... []		

To use the edit for Citizenship in SM

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value CITZINSMTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key value CITZINSM, enter the invalid citizenship codes from the setup reference (Section 2.3) that AFR will search for in the Student Quarterly Data (SM5017) and Admissions (SM2001) screens. If you are unsure which citizenship codes are invalid at your institution, check with your Registrar.
- 3 When scheduling the AFR job (SM9354J), for parameter Z-NON-CITZ-SM, enter **Y** (yes).

3.10 Editing for Non-Resident Fee Pay Status

The edit for Non-Resident Fee Pay Status will generate a tracking entry if the student has a fee pay status code that does not match one of the non-resident fee pay status codes you listed in the Student Quarterly Data (SM5017) or Admissions (SM2001) screens.

To use the edit for Non-Resident Fee Pay Status:

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value NONRESFEEPAYTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key value RESFEEPAY, enter the eligible fee pay statuses (using the reference list in Appendix A) that the AFR program will search for in the Student Quarterly Data (SM5017) and Admissions (SM2001) screens.

If you are unsure which fee pay status codes are eligible at your college, check with your Registrar.

- 3 When scheduling the AFR job (SM9354J), for parameter Z-NONRES-FEE-PAY, enter **Y** (Yes, do this edit).

3.12 Editing for Owes Repayment

The edit for Owes Repayment will generate a tracking entry if the student has a tracking code indicating that the student owes a repayment (for example, RP, S1, Z8) in his or her tracking history (for example, 0000 to C124).

Sample: Owes Repayment Code in Tracking Data Tab

CO	Conditions of Award	12/18/2020			NR	
DF	DEFAULTED ON STUDENT LOAN	12/28/2020			RQ	
RP	WCG REPAYMENT DUE	12/28/2020			RQ	

Depending on how you define the selection process when scheduling the job, AFR will search for:

- Any tracking code, or
- Only those tracking codes without Date Received dates, or
- A tracking code which has the most recent due date but which does not have a Date Received date.

To use the edit for Owes Repayment

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value OWESREPAYTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key value OWESREPAYTRK1, enter the valid tracking code that the AFR program will search for in the student's tracking history.
- 3 When scheduling the AFR job (SM9354J), for parameter Z-OWES-REPYMT, enter **Y** (Yes, do this edit).
- 4 When scheduling the AFR job (SM9354J), for the parameter SEL-REPAY-OPT, enter **1, 2, or 3** to indicate the following:
 - 1 Any default tracking code will cause the edit to fail, whether or not the record has a Date Received date.
 - 2 Any default tracking code without a Date Received date will cause the edit to fail.
 - 3 If the most recent (by due date) tracking code does not have a Date Received date, the edit will fail.

3.12 Editing for Record of Prior College Attendance

You can set up AFR to generate a tracking entry indicating that a student has a record of prior college attendance in the SM database, the Admissions module, or the Transfer database.

Editing for Record of Prior College Attendance in SM Database

The edit for Record of Prior College Attendance in the SM database will generate a tracking entry if, in either the Prev Col Yr 1 or Prev Col Yr 2 fields of the Admissions Screen (SM2001), the student has a record of prior college attendance. A record will be selected only if the student has a value in these fields matching the academic year relating to the year/session start of the program. For example, a year/session start of C231 will cause the program to search for values of 01 or 02 in the Prev Col Yr 1 or Prev Col Yr 2 fields. If the Registration or Admissions staff, at your college, tracks this data in the Admissions screen (SM2001), this edit can assist you in identifying a record in the SM database of mid-year transfer.

Sample: Prev Col Yr 1 and Prev Col Yr2 Codes on Admissions Screen (SM2001)

SM2001-008	ADMISSIONS	U T
SID.. [999][99][9999]		
Branch..... [LQ]	YRQ Plan strt. [C231]	Stu Prg Appl.. [SPSS]
Time Pref..... [2]	Adm Num..... [BBBBB]	App Rcpt Date. [12/07/21]
Adv Id..... [ROGL]	Sex..... [M]	Birth Date.... [12/31/69]
Stu Name..... [DUCK DON Q]		
Prev Name..... [DUCK DON]	Prev Name 2.. [LUCK]	
Stu Street.... [1234 DUCKBUSH DRIVE]	Stu City..... [BELLYVIEW]	
Stu St..... [AB]	Stu Zip..... [98004]	
Stu Day Phone. [555][666][7777]	Stu Eve Phone [555][803][9999]	
Census Race Cd [608]	Census Hisp Cd [717]	Eth Orig..... [4]
Citz Stat. [Y]	Res Stat..... [1]	Fee Pay Stat.. [01] Vet Bene... []
Hi Schl.. [282]	Hi Schl Last Yr [79]	Hi Schl Grad... [Y] Hi Schl Tran... []
Prev Col 1 [190]	Prev Col Yr 1.. [03]	Prev Col Grad 1 [Y] Prev Col Tran 1 []
Prev Col 2 []	Prev Col Yr 2.. []	Prev Col Grad 2 [] Prev Col Tran 2 []
Trnsfr Col Cr []	Stu Typ.... []	Adm Stat.... [] Reg Deposit Ind []
BA Grad..... [Y]	Rec Fee Ind []	Stu Enr Stat [] DSS..... []

To use the edit for Record of Prior College Attendance in the SM Database

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value PRCOLSMTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-PRIOR-COL-SM, enter **Y** (Yes, do this edit).

Editing for Record of Prior College Attendance in Admissions Module

The edit for Record of Prior College Attendance in the Admissions Module will generate a tracking entry if, in either the Prev Col Yr 1 or Prev Col Yr 2 fields on the Information Entry Screen (SD5031), the student has a record of prior college attendance. Some colleges use the Information Entry screen (SD5031) to enter a student record prior to registration; however, not all colleges use this screen, so check with your Registration staff before selecting this edit.

Sample: Prev Col Yr 1 Code on Information Entry Screen (SD5031)

SD5031-006	INFORMATION ENTRY		Date Entered [12/01/19]
		Copy To Sm []	YRQ [C231]
SID..... [999][99][9999]	Temp SID.... [] [] []		
Last Name.. [DUCK	First Name.. [DON	MI.. [Q]	
Prev Name.. [LUCK	Prev Name 2. []		
Adm Prog Cd... [AN]	Branch..... [LQ]	YRQ Plan Strt. [B672]	
Time Pref..... [2]	Adm Num..... [BBBBB]	Stu Prg Appl.. [SPSS]	
Adv Id..... [ROGL]	Sex..... [M]	App Rcpt Date [12/07/16]	
		Birth Date.... [12/31/89]	
Bad Addr Ind. []			
Stu Street.... [1234 DUCKBUSH DRIVE	Stu City..... [BELLYVIEW		
Stu St..... [AB]	Stu Zip..... [98004		
Stu Day Phone. [555][666][7777]	Stu Eve Phone [555][803][9999]		
Census Race Cd. [608]	Census Hisp Cd. [717]	Eth Orig..... [4]	
Citz Stat. [Y]	Res Stat..... [1]	Fee Pay Stat... [01]	Vet Bene..... []
Hi Schl... [282]	Hi Schl Last Yr [79]	Hi Schl Grad... [Y]	Hi Schl Tran... []
Prev Col 1 [190]	Prev Col Yr 1.. [03]	Prev Col Grad 1 [Y]	Prev Col Tran 1 []
Prev Col 2 []	Prev Col Yr 2.. []	Prev Col Grad 2 []	Prev Col Tran 2 []
Trnsfr Col Cr []	Stu Typ.... []	Adm Stat.... []	Reg Deposit Ind []
BA Grad..... [Y]	Rec Fee Ind []	Stu Enr Stat []	DSS..... []
Contact Origin [] []	Stu Interest [] [] []		
WEIGHT []	HEIGHT []	Nursing Ratings []	

A record will be selected only if, the value in these fields match the academic year related to the year/session start of the program. For example, a year/session start of C231 will cause the program to search for values of 01 or 02 in the Prev Col Yr 1 or Prev Col Yr 2 fields. If the Registration or Admissions Staff at your college track this data in the Information Entry Screen (SD5031), this edit can assist you in identifying a record in the ADM database of mid-year transfer. Data entered in the Admissions screen (SM2001) will also appear automatically in the same fields in the Information Entry screen (SD5031).

To use the edit for Record of Prior College Attendance in the Admissions Module

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value PRCOLADMTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-PRIOR-COL-ADM, enter Y (Yes, do this edit).

Editing for Record of Prior College Attendance in the Transfer Database

The edit for Record of Prior College Attendance in the Transfer Database will generate a tracking entry if, in the Trnsfr From field in the Transfer-In Transcript Courses Screen (SD3005), the student has a record within the year/session range for which the job is scheduled (for example, C231 to C124).

Sample: Trnsfr From Col in Transfer-In Transcript Courses Screen (SD3005)

```

SD3005-001          TRANSFER-IN TRANSCRIPT COURSES

  SID..... [999][99][9999]    Stu Name.... [DUCK DON Q          ]

      Trnsfr
      From
      Col      YRS      Dept  Course      Dec      Course
              Div      Num      Gr      Gr      Cr      Eval
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [050] [B902] [ENG ] [999 ] [B+] [ ] [ 5.0] [TR]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
              [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

                                     [ 1 ] of [ 1 ]
  
```

Typically, the following types of courses are entered:

- Courses transferred in and accepted from another institution
- Waived course requirements
- Nontraditional courses used to fill course requirements (such as CLEP credits, experiential learning, or military credits)

Check with your registration, admissions, or evaluation staff to determine if or how your institution uses this screen. For further information about this screen, see the SMS Grades and Records User Guide, Chapter 8 or the Transcript and Evaluation Process page on the SBCTC-IT web site at <http://www.sbctc.edu/colleges-staff/it-support/legacy-applications/sms/default.aspx> (Navigation: Student Management System (SMS) → SMS Modules and Functions → Student Progress → Transcript Evaluation Process → Transcript Evaluation Overview)

To use the edit for Record of Prior College Attendance in the Transfer Database

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value PRCOLTRNSFRTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-PRIOR-COL-TRNSFR, enter Y (Yes, do this edit).

3.13 Editing for Record of Financial Aid Probation in Tracking History

The edit for Record of Financial Aid Probation in Tracking History will generate a tracking entry if the student has a tracking code (for example, PB) in his or her tracking history (for example, 0000 to C124) indicating that the student was on probation. Depending on how you define the selection process when scheduling the job, AFR will search for:

- Any tracking code, or
- Only those tracking codes without Date Received dates, or
- A tracking code which has the most recent due date but which does not have a Date Received date.
-

Sample: Academic Probation Code in Tracking Data Tab

CO	Conditions of Award	12/18/2020			NR	
DF	DEFAULTED ON STUDENT LOAN	12/28/2020			RQ	
PB	PROBATION STATUS	12/28/2020			RQ	
WCG						

To use the edit for Record of Financial Aid Probation in Tracking History

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value PROBATIONTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key value PROBATIONTRK1, enter the valid tracking code that the AFR program will search for in the student's tracking history.
- 3 When scheduling the AFR job (SM9354J), for parameter Z-PROBATION, enter **Y** (Yes, do this edit).
- 4 When scheduling the AFR job (SM9354J), for parameter SEL-PROB-OPT, enter **1**, **2**, or **3** to indicate the following:
 - 1 Any default tracking code will cause the edit to fail, whether or not the record has a Date Received date.
 - 2 Any default tracking code without a Date Received date will cause the edit to fail.
 - 3 If the most recent (by due date) tracking code does not have a Date Received date, the edit will fail.

3.14 Editing for Financial Aid Termination

The edit for Prior Termination will generate a tracking entry if the student has a tracking code (for example, TM) in tracking history (for example, 0000 to C124) indicating that the student was previously terminated due to unsatisfactory academic progress.

Sample: Financial Aid Termination Code in Tracking Data Tab

DF	DEFAULTED ON STUDENT LOAN	12/28/2020			RQ	
PB	PROBATION STATUS	12/28/2020			RQ	
RP	WCG REPAYMENT DUE	12/28/2020			RQ	
TM	Termination Due To SAP	12/28/2020			RQ	

Depending on how you define the selection process for this edit when scheduling the job, AFR will search for:

- Any tracking code, or
- Only those tracking codes without Date Received dates, or
- A tracking code which has the most recent due date but which does not have a Date Received date.

To use the edit for Record of Financial Aid Termination in Tracking History

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value TERMTRK, enter a tracking code and tracking status.
- 2 In the FAM Processing Table (System CIS/Table ID WRV), for the key value TERMTRK1, enter the valid tracking code that the AFR program will search for in the student's tracking history.
- 3 When scheduling the AFR job (SM9354J), for parameter Z-TERMINATED, enter **Y** (Yes, do this edit).
- 4 When scheduling the AFR job (SM9354J), for parameter SEL-TERM-OPT, enter **1**, **2**, or **3** to indicate the following:
 - 1 Any default tracking code will cause the edit to fail, whether or not the record has a Date Received date.
 - 2 Any default tracking code without a Date Received date will cause the edit to fail.
 - 3 If the most recent (by due date) tracking code does not have a Date Received date, the edit will fail.

3.15 Editing for Veteran's Benefits

The edit for Veteran's Benefits will generate a tracking entry if the student has a value greater than zero in the Vet Bene field in the Admissions screen (SM2001). The values for this field are defined in the TBL4 database in the VET-BENE-M data set. You can create a DataExpress report to extract the title for each entry in this data set by selecting the VET-BENE field.

Sample: Vet Bene Code on Admissions Screen (SM2001)

SM2001-008		ADMISSIONS	
SID.. [999][55][8828]			
Branch..... []	YRQ Plan Strt. [C232]	Stu Prg Appl.. []	
Time Pref..... []	Adm Num..... []	App Rcpt Date. [12/07/19]	
Adv Id..... []	Sex..... [F]	Birth Date.... [01/01/77]	
Stu Name..... [PRANCER, SANTA]			
Prev Name..... []		Prev Name 2.. []	
Stu Street.... [123 STREET ROAD]		Stu City..... [SEATTLE]	
Stu St..... [WA]		Stu Zip..... [98125]	
Stu Day Phone. [][][]		Stu Eve Phone [][][]	
Census Race Cd []	Census Hisp Cd []	Eth Orig..... []	
Citz Stat. [Y]	Res Stat..... [1]	Fee Pay Stat.. [01]	Vet Bene... [2] ←
Hi Schl.. [999]	Hi Schl Last Yr [91]	Hi Schl Grad... [N]	Hi Schl Tran... []
Prev Col 1 []	Prev Col Yr 1.. []	Prev Col Grad 1 []	Prev Col Tran 1 []
Prev Col 2 []	Prev Col Yr 2.. []	Prev Col Grad 2 []	Prev Col Tran 2 []
Trnsfr Col Cr []	Stu Typ.... []	Adm Stat.... []	Reg Deposit Ind []
BA Grad..... []	Rec Fee Ind []	Stu Enr Stat []	DSS..... []

To use the edit for Veteran's Benefits

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value VETBENINSMTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-VET-BENEFITS, enter Y (Yes, do this edit).

3.16 Editing for Wants Work Study

The edit for Wants Work Study will generate a tracking entry if the student answered “yes” to FAFSA question 37 (which translates to **1** on the ISIR).

Sample: Interested in Work Study Code on ISIR Tab

35.	Grade Level in College	0
36.	Degree/Certificate	1
37.	Interested in Work-Study?	1
38.	Filler	

To use the edit for Interested in Work Study

- 1 In the FAM Processing Table (System CIS/Table ID WRV), for the key value WORKSTUDYTRK, enter a tracking code and tracking status.
- 2 When scheduling the AFR job (SM9354J), for parameter Z-WANTS-WORK-STY, enter **Y** (Yes, do this edit).

4 Running Automatic File Review

The AFR job SM9354J selects students who have applied for financial aid, as identified by the received tracking entry cited in the SAF/AGENCY FAM Processing Table (for value SAF057-FAF-TRK. The job reviews the specified year/session start (for example, C231) for the submitted documents specified in TRK-CD-RQ-SEL (required) and TRK-CD-OPT-SEL (optional) and excludes any student record that does not have a Date Received date for those tracking codes. If no Date Received date is indicated for either of these tracking codes, the student's record is excluded from the AFR process. The AFR job primarily looks at the data in FAM and SMS for the year/session range specified; however, in some cases, the process will review a student's entire tracking history.

You can run the job SM9354J either stand-alone or in job group AG920R. Job Group AG920R also optionally runs SM9142J – Financial Aid Staff File Review. See section 4.2 for more information on SM9142J.

You can also run the job SM9354J in either preliminary or final mode. When you run the job in preliminary mode, it generates only the reports. When you run the job in final mode, it generates and posts tracking codes as well as the reports. Also, when you run the job in final mode, you are provided with certain options for posting tracking codes.

Note: if you use the 5th quarter (C235), make sure that the **equivalent quarter C341** has been established in SMS on the College Quarter Information screen (SM5020) before you run SM9354J for the first time.

4.1 Job Scheduling Parameters for SM9354J

This section describes how to use parameters for selection criteria and edit flags when scheduling the AFR job (SM9354J). There may be additional parameters if you run SM9354J in job group AG920R.

Scheduling Parameters for Selection Criteria

Use the following parameters when scheduling the AFR job SM9354J to indicate which student records you want to select.

SM9354J Parameter	Description
AWARD-CD-SEL-LN1 AWARD-CD-SEL-LN2 AWARD-CD-SEL-LN3 AWARD-CD-SEL-LN4 AWARD-CD-SEL-LN5	<p>Enter up to 10 award codes per line for students who fail an edit and have already received awards. This causes a student to appear on report SM9354A instead of report SM9354B. Students on report SM9354B should be only those who:</p> <ul style="list-style-type: none"> • have a completed file review; • have been awarded title IV aid; and • have subsequently failed an edit. <p>By shifting students with non-Title IV aid from report SM9354B to report SM9354A, you ensure that report SM9354B will list only students with problems and SM9354A will only list students who need their eligibility for Title IV aid reviewed.</p>
EXCLUDE-INACTIVE	<p>Enter Y to exclude students with inactive codes as defined in the FAM Processing Table (System CIS/Table ID WRV) key value EXCLUDETRK-CDES.</p>
FAF-BEG-DATE	<p>Use this parameter to define the beginning of the date range for which students are to be reviewed. The date applies to the tracking code that denotes an ISIR record has been uploaded into the FAM system, as defined in the FAM Processing Table (System SAF/Table ID AGENCY value SAF057-FAF-TRK). Enter the range beginning date by which the student's FAF must be received, or leave this parameter blank if you do not want a beginning date. If you enter a beginning date but no corresponding end date, all records from this date forward will be reviewed.</p> <p>Note: If SAF057-FAF-TRK is not set up and is not currently in use with tracking entries posted for each uploaded student, AFR will not select any students.</p>
FAF-END-DATE	<p>Use this parameter to define the end of the date range for which students are to be reviewed. The date applies to the tracking code that denotes an ISIR record has been uploaded into the FAM system, as defined in the value SAF057-FAF-TRK in the FAM Processing Table (System SAF/Table ID AGENCY). Enter the range ending date by which the student's FAF must be received, or leave this parameter blank if you do not want an ending date. If you enter an end date but no corresponding beginning date, all records from this date and earlier will be reviewed.</p> <p>Note: If SAF057-FAF-TRK is not set up and is not currently in use with tracking entries posted for each uploaded student, AFR will not select any students.</p>

SM9354J Parameter	Description
FILE-REVIEW-OPT	<p>Use this parameter to control which students are selected based on their review status. Valid entries are:</p> <ul style="list-style-type: none"> A Select all students to review. P Select only students marked with professional review. S Select only students marked with staff review.
NON-SMS-EXCLUDE	<p>Use this parameter to exclude students who do not have a record in SMS. Valid entries are:</p> <ul style="list-style-type: none"> Y Student must have a record in SMS to be evaluated in file review. N All records meeting other specified criteria will be evaluated. Records with no SMS data will have a tracking code posted in FAM505.
POST-NOTIFY-DATE	<p>When you run the job in final mode, for each added tracking entry, you can choose to post the run date of the job to the Notify Date field instead of the Due Date field on the Tracking Tab. Valid entries are:</p> <ul style="list-style-type: none"> Y Change the Notify Date to the current date. N Change the Due Date to the current date. <p>If you are running the job in preliminary mode, enter N (no).</p>
POST-RECVD-DATE	<p>When you run the job in final mode, for the tracking code defined as the file review code, if a student has a Date Received date in all required items, you can choose to post the run date of the job in the Date Received field on the Tracking Tab.</p> <ul style="list-style-type: none"> Y Post a Date Received date for the file review code if a student has all required items received. N Do not post a Date Received date for the file review code.
PRELIM-FINAL	<p>Use this parameter to specify whether the job is to be run in preliminary or final mode. Valid entries are:</p> <ul style="list-style-type: none"> P Preliminary run (report only) F Final run with posting of tracking codes.
SEL-DEFAULT-OPT	<p>Use this parameter to control when an edit will fail. Valid entries are:</p> <ol style="list-style-type: none"> 1 Any default tracking code will cause the edit to fail, whether or not it has a Date Received date. 2 Any default tracking code without a Date Received date will cause the edit to fail. 3 The edit will fail if the most recent (by due date) tracking code does not have a Date Received date.
SEL-PROB-OPT	<p>Use this parameter to control when an edit will fail. Valid entries are:</p> <ol style="list-style-type: none"> 1 Any default tracking code will cause the edit to fail, whether or not it has a Date Received date. 2 Any default tracking code without a Date Received date will cause the edit to fail. 3 The edit will fail if the most recent (by due date) tracking code does not have a Date Received date.
SEL-REPAY-OPT	<p>Use this parameter to control when an edit will fail. Valid entries are:</p> <ol style="list-style-type: none"> 1 Any default tracking code will cause the edit to fail, whether or not it has a Date Received date. 2 Any default tracking code without a Date Received date will cause the

SM9354J Parameter	Description
	<p>edit to fail.</p> <p>3 The edit will fail if the most recent (by due date) tracking code does not have a Date Received date.</p>
SEL-TERM-OPT	<p>Use this parameter to control when an edit will fail. Valid entries are:</p> <p>1 Any default tracking code will cause the edit to fail, whether or not it has a Date Received date.</p> <p>2 Any default tracking code without a Date Received date will cause the edit to fail.</p> <p>3 The edit will fail if the most recent (by due date) tracking code does not have a Date Received date.</p>
SORT-OPTION	<p>Use this parameter to control how the information is sorted. Valid entries are:</p> <p>1 Sort by student ID numbers</p> <p>2 Sort by student name</p>
TRACK-CD-OPT-DATE	<p>Enter the date by which the tracking items listed in TRK-CD-OPT-SEL must be received. Leave this parameter blank if there is no date requirement.</p>
TRK-CD-OPT-SEL	<p>Enter the tracking codes that must have a Date Received date in order for a student to be selected for file review. A student is not required to have all of the tracking codes listed; but if a student has a tracking code matching any in the list, that tracking item must have a Date Received date. Use TRK-CD-OPT-DATE to indicate that the tracking items must be received by the specified date.</p>
TRK-CD-RQ-DATE	<p>Enter the date by which the tracking items listed in TRK-CD-RQ-SEL must be received. Leave this parameter blank if there is no date requirement.</p>
TRK-CD-RQ-SEL	<p>Enter the tracking codes that must have a Date Received date in order for a student to be selected for file review. A student must have a Date Received date in all of the tracking codes listed. Use TRK-CD-RQ-DATE to enter the date by which the tracking item must have a Date Received date.</p>
YR-SES-BEG	<p>Enter the first year/session to be reviewed, for example, C231.</p>
YR-SES-END	<p>Enter the last year/session to be reviewed, for example, C234.</p> <p>Note: Session C235 must be defined with the correct session equivalent of C341. Check the Import Sessions page (Application Setup → New Year) to confirm that this equivalent is set up correctly. C341 also needs to be established on SM5020 screen in SMS.</p>
YR-SES-START	<p>Enter the first year/session of the academic year, (for example, C231)</p>

Scheduling Parameters for AFR Edit Flags

Use the following parameters when scheduling the AFR job SM9354J to indicate which edit flags you want for the selected student records. To select an edit flag, enter **Y** (yes) for the parameter. To omit an edit flag enter **N** (no) for a parameter.

For detail information about how to set up and use each of these parameters, see Chapter 3, “Understanding AFR Edit Flags.”

SM9354J Parameter	Edit Flag Definition
Z-AGENCY-SPONSOR	Student has an award in the Sponsorship module.
Z-BA-DEG-NEED	Student has a bachelor's degree in NEED.
Z-BA-DEG-SM	Student has a bachelor's degree in SMS.
Z-ELIGIBILITY-CD	Student has an academic ineligibility flag on Student Data Tab.
Z-EST-INC-PAR	Parent income is estimated.
Z-EST-INC-STU	Student income is estimated.
Z-HS-GED	Student does not have a high school diploma or GED certificate.
Z-IN-DEFAULT-ED	Student is in default on a student loan.
Z-INVALID-INTENT	Student has an invalid student intent in one or more of the sessions being reviewed.
Z-INVALID-PROG	Student has an invalid program enrolled in SMS.
Z-NON-CITZ-NEED	Student is a non-citizen or not an eligible alien in NEED.
Z-NON-CITZ-SM	Student is a non-citizen or not an eligible alien in SMS.
Z-NONRES-FEE-PAY	Student's fee pay status in SMS is not resident.
Z-OWES-REPYMT	Student owes a repayment as noted by a tracking code somewhere in the student's tracking history.
Z-PR-COL-TRNSFR	Student transferred in credits from another college in the transfer database.
Z-PRIOR-COL-ADM	Student indicated he/she attended a prior college in Admissions.
Z-PRIOR-COL-SM	Student indicated he/she attended a prior college in Registration.
Z-PROBATION	Student has record of financial aid probation in tracking history.
Z-TERMINATED	Student has record of financial aid termination in tracking history.
Z-VET-BENEFITS	Student indicated receipt of veteran's benefits in SMS.
Z-WANTS-WORK-STY	Student wants work-study.

4.2 AFR Reports

The following reports are generated when the AFR job SM9354J is run:

Report	Title	Description
SM9354A	Financial Aid Automatic File Review	The names of students who have no awards or who have awards that were listed in the parameters AWARD-CD-SEL-LN1 through AWARD-CD-SEL-LN5.
SM9354B	Financial Aid Automatic File Review – Awards	The names of students who received an award that is not excluded in the parameters AWARD-CD-SEL-LN1 through AWARD-CD-SEL-LN5 in the specified year/session range.
SM9354C	Financial Aid File Review – Errors	The error or key value that was missing if there are scheduling errors, missing FAM Processing Table entries, or no data. If there are no scheduling errors, this report will not be printed.

4.3 Financial Aid Staff File Review (SM9142J)

You can use the job Financial Aid Staff File Review (SM9142J) in conjunction with Automatic File Review. This job can be run stand alone or in job group AG920R.

This job produces a list student records that are ready for staff to review. This job creates three reports using the same criteria as the AFR job (SM9354J) to select a student. In order for students to be selected, they must:

- Have either the tracking code File Complete (*filereviewtrk* key value, also referred to as Staff Review) or Professional Review (*proreviewtrk* key value)
- Not have any awards in the session range specified in the scheduling parameters

The reports associated with this job are:

Report	Title	Description
SM9142A	Files Ready for Professional Review	Students with no Date Received date for the tracking code Professional Review (<i>proreviewtrk</i> key value).
SM9142B	Files Ready for Staff Review	Students with no Date Received date for the tracking code File Complete (<i>filereviewtrk</i> key value, also referred to as Staff Review).
SM9142C	Files Ready for Packing Report	Students with a Date Received date for either the File Complete tracking code (<i>filereviewtrk</i> key value, also referred to as Staff Review) or Professional Review tracking code, even if other required tracking items are missing a Date Received date. This does not apply to those tracking codes listed in the TRACK-CD-SEL run time parameter.





















Use the following selection criteria parameters when scheduling job SM9142J:

Parameter	Description
FAF-RCVD-DT	<p>Enter the date the student's FAF (electronic application) was received in financial aid. This will select students with a posted tracking code (Tracking Tab) equal to the tracking code defined in FAM Processing Table (System SAF/Table ID AGENCY) value SAF057-FAF-TRACK and a Date Received date equal to the date entered in this parameter. If left blank, all students with the tracking code, regardless of Date Received date, are selected.</p> <p>Note: If SAF057-FAF-TRK is not set up and is not currently in use with tracking entries posted for each uploaded student, the AFR program will not run. However, a missing Date Received date will not block SM9142J from running or reporting an individual student.</p>
SM9142-RPT-OPT	<p>Use this parameter to specify which reports you want to print. Valid entries are:</p> <ul style="list-style-type: none"> 1 Files ready for professional review report 2 Files ready for staff review report 3 Files ready for packaging report Blank All reports will be printed
SORT-OPTION	<p>Use this parameter to control how the information is sorted. Valid entries are:</p> <ul style="list-style-type: none"> 1 Sort by Student Identification 2 Sort by Student Name, Student Identification
TRACK-CD-SEL	<p>Use this parameter to enter up to ten tracking codes that must have Date Received dates in order for the student to be selected for review. Do not separate the codes with spaces or commas. If left blank, all students will be selected.</p>
YR-SES-BEG	<p>Enter the first session in the year/session range to review, for example, C231.</p>
YR-SES-END	<p>Enter the last session in the year/session range to review, for example, C234 or C235.</p>
YR-SES-START	<p>Enter the first year/session for the academic year, for example, C231.</p>

Enter the letter data and then click the save button at either the top or bottom of the page.

Note: Once you have created a tracking letter using the Tracking Letter Template Create page, you will not be able to edit the Name field.

To update a template listed on the Tracking Template List page, click the Edit icon  :

Tracking Template List		
Name	Edit	Delete
12/13 Tracking Letter		
2013-14 Tracking Letter		
2014-2015 Tracking Letter		
2015-2016 Tracking Letter		
2016-2017 Tracking Letter		
2017-2018 TRACKING LETTER		
2018-2019 Tracking Letter		
2019-2020 Tracking Letter		
2020-2021 Tracking Letter		
2021-2022 Tracking Letter		



Use the Tracking Letter Template Edit page to enter the updated information and then click the Save button at either the top or bottom of the page.

Tracking Letter Template Options

You have several options when establishing the template for the tracking letters. In addition to descriptive paragraphs that describe the purpose of the letter, the template also includes control lines that indicate such things as whether or not to print dates on the letter:

\$TRACK XX,XX,XX where XX is one or more tracking codes to be included on the letter.

\$END indicates the end of the tracking codes entered in the \$TRACK entry.

\$NODATE suppresses the printing of dates on the tracking letter.

\$STATUS XX,XX indicates the tracking item statuses to be included in the tracking letter generation process as dictated by the SAF_NOTATION_CODE.

\$NOITEM selects the letters based on the \$TRACK and/or \$STATUS entries, but does not print the items on the tracking letter.

\$NULL is similar to \$END; terminates a letter track/status entry. Using \$NULL instead of \$END causes no line to print with the tracking code(s), description(s), or date(s). The \$NULL entry must immediately follow the \$TRACK or the \$STATUS entry. \$NULL *cannot* be used with \$END, \$NODATE, or \$NOITEM.

Appendix A: Reference Tables for AFR Set-Up

Citizenship Codes (select and highlight ineligible codes for table master entry)	
A1	DIPLOMAT
A2	OTH GOV EMP & IM FAM
A3	A1/A2 EMP+OWN IM FAM
AS	ASYLEE
B1	TEMP VISITR BUSINESS
B2	TEMP VISITR PLEASURE
C1	ALIEN IN TRANSIT
C2	C1 TO UN HDQTRS DIST
C3	C1 OFFICIAL & IM FAM
D	ALIEN CREWMN SEA/AIR
E1	TRTY TRDR/SPS/CHLDRN
E2	TRTY INVSTR/SPS/CHLD
E3	TRTY PROF/SPS/CHLDRN
F1	STUDENT
F2	STUDENT SPOUSE/CHILD
G1	REP REC GOV&STF/I FM
G2	OTH G1 REP & IM FAM
G3	G1/NONREC GOV&IM FAM
G4	INTL ORG EMPL&IM FAM
G5	G1234 SVT/EMP&IM FAM
H1	TEM WKR/MERIT&ABILITY
H2	ENTERTAINMENT
H3	TEMP TRAIN-MED GRADS
H4	DEP TEMP WORK/TRAIN
I	MEDIA REP & SPS/CHLD
IE	INTL EARNING
IM	PERMNT RES/IMMIGRANT

J1	EXCHANGE VISITOR
J2	EXCHNG VSTR SPS/CHLD
K1	FIANCEE OF US CITIZN
K2	CHLD OF CTZN'S FNCEE
L1	INTRA COMPANY TRNSFR
L2	DEP INTRA COMP TRNSF
M1	VOCATIONAL
M2	VOCATIONAL DEPENDANT
O1	UNIQUE TALENT
O2	UNIQUE TALENT ASSIST
O3	UNIQUE TALENT FAMILY
PP	PUBLIC INT PAROLE
Q1	INTL CULTURAL EXCHNG
R	RELIGIOUS WORKER
R2	R-1 CHLD/SPOUSE
RF	REFUGEE
T	TEMPORY RESIDENTS
TD	DEP OF CAN/MEX NAFTA
TN	CANADA/MEX BUS-NAFTA
U1	VICTIM OF CRIME
U2	SPOUSE OF CODE U1
U3	CHILD OF CODE U1
Y	US Citizen
ZZ	OTHER

Intent Codes (select and highlight eligible codes for table master entry)	
A	ACADEMIC NON-TRANSFR DEGREE PROGRAM
B	ACADEMIC TRANSFER PROGRAM
D	BASIC EDUCATION FOR ADULTS
F	PROFESSIONAL TECHNICAL PROGRAM
G	PROFESSIONAL TECHNICAL PROGRAM APPLICANT
H	APPRENTICESHIP PROGRAM
I	APPLIED BACCALAUREATE PROGRAM
J	UPGRADING JOB SKILLS COURSES
K	HOME AND FAMILY
L	NON-AWARD SEEKING STUDENT
M	MULTIPLE PROGRAMS
W	EXCLUSIVE CONTINUING EDUCATION
Y	NONE OF THE ABOVE

Fee Pay Status Codes (confer with Registration Office to select and highlight eligible codes for students paying resident tuition)	
01	RESIDENT
02	NON-RESIDENT
03	NEED BASED (3%)
04	CHLD OF POLICE/FIRE
07	IDAHO RECIPROCITY
09	MILITARY PERSONNEL
10	SEN CITIZEN (AUDIT)
12	HI SCHL COMPL
13	CONCURRENT ENROLLMNT
15	NON-RES OVER 18 CR
16	RESIDENT OVER 18 CR
17	OVER 18 CR EX;N-RES
18	OVER 18 CR EXEMP RES
20	NON-RES HI SCHL WVR
21	UNEMPLOYED TUIT WAIV
22	UNDREMPLOY TUIT WAIV
23	REFUGEE-RES FEE PAY
24	PUBLIC HI ED EMPLOYE
25	NATIVE AMER NRES WVR
26	OR/ID RES 6 CR OR LS
29	NONRES OPER FEE WVR
30	COUNTY BORDER PROJ
31	NRES OPER FEE WRV-2
32	BASIC SKILLS WAIVER
33	UNDETERMINED
34	NOT PAID
35	INTRNL CONTRACT STU
36	WASH. HI SCHL GRADS
37	DEAF STUDENTS

Fee Pay Status Codes (confer with Registration Office to select and highlight eligible codes for students paying resident tuition)	
38	INTERNTNL EXCHANGE
41	JOB SKILLS PROGRAM
42	I-BEST
43	CUSTOM JOB TRAINING
46	I-BEST NON-STATE FND
51	STATE EMPLOYEE
52	CONGRESSNL DEPENDNTS
55	ALTERNATIVE HIGH SCH
56	SEN CITIZEN (CREDIT)
58	DISLOCATED WKRS RES
59	DISLOCATED WKRS NRES
60	STATE PET PROGRAM
62	COLLEGE IN HIGH SCHL
63	ATHLETIC WAIVER-RES
64	ATHLETIC WAV NONRES
65	RES BECCALAUREATE
66	NONRES BACCALAUREATE
67	INTL BACCALAUREATE
68	ATHLETE WVR/NR WVR
70	ELIG VET/NAT GUARD
71	OTHER VETERANS
72	FALLEN VET SPS/CHLD
75	DOD TA BLDGSA
78	BA OPP DIFFERENTIAL
79	SUMMER SELF SUPPORT
80	NON-TUITION CLASS
81	ITECH
84	WRONGLY CONVICTED
90	ADV JRNYERS UPGRADE
91	APPRENTICESHIP

Fee Pay Status Codes (confer with Registration Office to select and highlight eligible codes for students paying resident tuition)	
92	BASIC SKILLS
93	EMT
94	INDUSTRIAL FIRST AID
95	PARENT ED/FAM LIFE
96	FARM/SMALL BUS MGT
97	RETIREMENT
98	COMMUNITY SERVICE
G7	Open Doors (HB1418)
G8	Gateway to College
G9	HS Dropout ReEngage
M0	RS 10 CR FEE WVR
M1	RS 11 CR FEE WVR
M2	RS 12 CR FEE WVR
M3	RS 13 CR FEE WVR
M4	RS 14 CR FEE WVR
M5	RS 15 CR FEE WVR
N3	RS 3 CR FEE WVR
N4	RS 4 CR FEE WVR
N5	RS 5 CR FEE WVR
N6	RS 6 CR FEE WVR
N7	RS 7 CR FEE WVR
N8	RS 8 CR FEE WVR
N9	RS 9 CR FEE WVR
PA	OLYMPIC CORR CENTER
PB	CLALLAM BAY
PC	STAFFORD CREEK
PD	CEDAR CREED
PE	TACOMA PRE-RELEASE
PF	MCNEIL ISLAND
PG	WA CORRECTIONS

Fee Pay Status Codes (confer with Registration Office to select and highlight eligible codes for students paying resident tuition)	
PH	LARCH MOUNTAIN
PI	PINE LODGE
PJ	AIRWAY HEIGHTS
PK	WA ST PENINTENTAIRY
PL	COYOTE RIDGE
PM	AHTANUM VIEW CORR
PN	WAS CORR FOR WOMEN
PO	MISSION CREEK CORR
PP	SPECIAL OFFENDER PRG
PQ	TWIN RIVERS CORR
PR	MINIMUM SEC UNIT
PS	WA STATE REFORMATORY
R0	RS 10 CR
R1	RS 11 CR
R2	RS 12 CR
R3	RS 13 CR
R4	RS 14 CR
R5	RS 15 CR
S3	RS 3 CR
S4	RS 4 CR
S5	RS 5 CR
S6	RS 6 CR
S7	RS 7 CR
S8	RS 8 CR
S9	RS 9 CR
VC	VIRTUAL CAMPUS
WC	WATER CENTER
WZ	WEATHERIZATION
ZZ	NON TUITION

Appendix B: Sample Reports for AFR

Report SM9354A – Students Without Awards

WED, DEC 24, 2021, 03:10 PM

160 HAPPY VALLEY COMM COLLEGE
 FINANCIAL AID AFR
 STUDENTS WITHOUT AWARDS

PAGE 1
 REPORT SM9354B
 VER001

POST NOTIFY DATE: NO
 POSTING SESSION: C231
 POST DATE RECEIVED: NO
 FILE DATE RECEIVED: -
 SESSION RANGE: C231-C235
 NEED DATABASE: NEED23
 STUDENTS SELECTED: ALL STUDENTS SELECTED
 RUN TYPE: PRELIMINARY -- NO TRACKING RECORDS HAVE BEEN POSTED

EXCLUDE INACTIVE STUDENTS: NO
 EXCLUDE NON-SMS STUDENTS: NO

IN DEFAULT SELECTION OPTION:	00000000	00000000	00000000
REPAYMENT SELECTION OPTION:	00000000	00000000	00000000
TERMINATION SELECTION OPTION:	00000000	00000000	00000000
ON PROBATION SELECTION OPTION:	00000000	00000000	00000000

REQUIRED TRACK CODES FOR SELECTION:
 REQUIRED TRACK CODES DATE RECEIVED:

OPTIONAL TRACK CODES FOR SELECTION:
 OPTIONAL TRACK CODES DATE RECEIVED:

AWARD CODES FOR EXCLUSION:

EDITS SELECTED:
 APPLY FOR ADMISSION
 APPLY FOR ADMISSION
 NO RECORD IN NEED DATABASE
 VETERANS BENEFITS IN REGISTRATION
 PROFESSIONAL REVIEW
 FILE REVIEW
 PASSED ALL EDITS

WED, DEC 24, 2021, 03:10 PM

160 HAPPY VALLEY COMM COLLEGE
FINANCIAL AID AFR
STUDENTS WITHOUT AWARDS

PAGE 2
REPORT SM9354A
VER001

STUDENT NAME	STUDENT ID	TRACK CODE	TRACK STATUS	TITLE	DUE DATE	NOTIFIED DATE	COMMENT
BOYD CRYSTAL	999-80-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		FU	RQ	VETERANS BENEFITS IN REGISTRATION	01/04/22	01/04/22	
		F4	RQ	FILE REVIEW	01/04/22	12/24/21	
DANH MAMMY	999-71-8888	F4	RQ	FILE REVIEW	01/04/22	12/24/21	
ELLS DONNA	999-74-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		F4	RQ	FILE REVIEW	01/04/22	12/24/21	
ANEY HOLLAND	999-19-5555	FU	RQ	VETERANS BENEFITS IN REGISTRATION	01/04/22	01/04/22	
TOMSON MISTI	999-88-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		FU	RQ	VETERANS BENEFITS IN REGISTRATION	01/04/22	01/04/22	
		F4	RQ	FILE REVIEW	01/04/22	12/24/21	
MOWD RICHARD	999-78-8888	FU	RQ	VETERANS BENEFITS IN REGISTRATION	01/04/22	01/04/22	
PRANCER SANTA	999-98-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		FU	RQ	VETERANS BENEFITS IN REGISTRATION	01/04/22	01/04/22	
		FP	RQ	PROFESSIONAL REVIEW	01/04/22	12/24/21	
MOBLEY CHRIS	999-90-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		F4	RQ	FILE REVIEW	01/04/22	12/24/21	
DEED JACK	999-40-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		F4	RQ	FILE REVIEW	01/04/22	12/24/21	
MARTI ERIN	999-53-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		FP	RQ	PROFESSIONAL REVIEW	01/04/22	12/24/21	
MONA KALI	999-12-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		F4	RQ	FILE REVIEW	01/04/22	12/24/21	
NGUYEN BAO	999-40-8888	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		F4	RQ	FILE REVIEW	01/04/22	12/24/22	
HOE DAN	999-55-1212	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /	
		FP	RQ	PROFESSIONAL REVIEW	01/04/22	12/24/22	
TRUCK TINA	999-98-9999	F3	RQ	CITIZENSHIP IN SM INELIGIBLE	01/04/22	01/04/22	BLANK CITZ CODES

***** END OF REPORT *****

Report SM9354B – Students With Awards

WED, DEC 24, 2020, 03:10 PM

160 HAPPY VALLEY COMM COLLEGE
FINANCIAL AID AFR
STUDENTS WITH AWARDS

PAGE 1
REPORT SM9354B
VER001

POST NOTIFY DATE: NO
POSTING SESSION: C231
POST DATE RECEIVED: NO
FILE DATE RECEIVED: -
SESSION RANGE: C231-C235
NEED DATABASE: NEED23
STUDENTS SELECTED: ALL STUDENTS SELECTED
RUN TYPE: PRELIMINARY -- NO TRACKING RECORDS HAVE BEEN POSTED

EXCLUDE INACTIVE STUDENTS: NO
EXCLUDE NON-SMS STUDENTS: NO

IN DEFAULT SELECTION OPTION:	00000000	00000000	00000000
REPAYMENT SELECTION OPTION:	00000000	00000000	00000000
TERMINATION SELECTION OPTION:	00000000	00000000	00000000
ON PROBATION SELECTION OPTION:	00000000	00000000	00000000

REQUIRED TRACK CODES FOR SELECTION:
REQUIRED TRACK CODES DATE RECEIVED:

OPTIONAL TRACK CODES FOR SELECTION:
OPTIONAL TRACK CODES DATE RECEIVED:

AWARD CODES FOR EXCLUSION:

EDITS SELECTED:

APPLY FOR ADMISSION
APPLY FOR ADMISSION
NO RECORD IN NEED DATABASE
PRIOR COLLEGES ATTENDED IN ADMISSIONS
PRIOR COLLEGES ATTENDED IN REGISTRATION
PRIOR COLLEGES ATTENDED IN TRANSFER
CITIZENSHIP IN NEED INELIGIBLE
CITIZENSHIP IN SM INELIGIBLE
PROFESSIONAL REVIEW
FILE REVIEW
PASSED ALL EDITS

WED, DEC 24, 2021, 03:10 PM

160 HAPPY VALLEY COMM COLLEGE
FINANCIAL AID AFR
STUDENTS WITH AWARDS

PAGE 2
REPORT SM9354B
VER001

STUDENT NAME	STUDENT ID	TRACK CODE	TRACK STATUS	TITLE	DUE DATE	NOTIFIED DATE	COMMENT	
ARNOLD KADE	999-55-9999	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /		
		F4	RQ	FILE REVIEW	01/04/22	12/24/22		
				YEAR SESSION	AWARD CODE	AWARD STATUS CODE	AWARD AMOUNT	AWARD SUBCODE
				C232	01	2	1,250.00	
				C232	09	6	546.00	
				C232	02	2	400.00	
				C123	01	2	1,250.00	
				C123	09	6	546.00	
				C123	02	6	400.00	
				C124	01	2	1,250.00	
BROYHILL CRAIG	999-55-4444	AD	RQ	APPLY FOR ADMISSION	01/04/22	/ /		
		F4	RQ	FILE REVIEW	01/04/22	12/24/21		
				YEAR SESSION	AWARD CODE	AWARD STATUS CODE	AWARD AMOUNT	AWARD SUBCODE
				C232	01	2	267.00	
		C123	01	2	267.00			
		C124	01	2	266.00			
DUCK DON	999-99-9999	AD	RQ	APPLY FOR ADMISSION	01/04/22	01/04/22		
		FN	RQ	PRIOR COLLEGES ATTENDED IN TRANSFER	01/04/22	01/04/22	050	
		FM	RQ	PRIOR COLLEGES ATTENDED IN REGISTRATION	01/04/22	01/04/22	16-190	
		FL	RQ	PRIOR COLLEGES ATTENDED IN ADMISSIONS	01/04/22	01/04/22	16-190	
		FP	RQ	PROFESSIONAL REVIEW	01/04/22	01/04/22		
		YEAR SESSION	AWARD CODE	AWARD STATUS CODE	AWARD AMOUNT	AWARD SUBCODE		
		C232	80	2	1,275.00	888		

College code for Transferred in credits

Year attended and Previous college code

Report SM9354C – Report of Scheduling Errors

MON, DEC 24, 2021, 03:41 PM

160 HAPPY VALLEY COLLEGE
FINANCIAL AID AUTOMATIC FILE REVIEW
REPORT OF SCHEDULING ERRORS

PAGE 1
REPORT SM9354C
VER012

POST NOTIFY DATE: NO
POSTING SESSION: C231
POST RECEIVED DATE: NO
FILE RECEIVED DATE: -
SESSION RANGE: C231--C235
NEED DATABASE: NEED23
STUDENTS SELECTED: ALL STUDENTS SELECTED
RUN TYPE: PRELIMINARY -- NO TRACKING RECORDS HAVE BEEN POSTED

EXCLUDE INACTIVE STUDENTS: NO
EXCLUDE NON-SMS STUDENTS: NO

IN DEFAULT SELECTION OPTION:
REPAYMENT SELECTION OPTION:
TERMINATION SELECTION OPTION: MOST RECENT TRACKING CODE WITH NO REC'D DATE
ON PROBATION SELECTION OPTION:

REQUIRED TRACK CODES FOR SELECTION:
REQUIRED TRACK CODES RECEIVED DATE:

OPTIONAL TRACK CODES FOR SELECTION:
OPTIONAL TRACK CODES RECEIVED DATE:

AWARD CODES FOR EXCLUSION:

EDITS SELECTED:
YVC Enrollment Services Record
Admission is not current
NO FA APPLICATION
TRANSFER CREDITS
TRANSFER CREDITS
TRANSFER CREDITS
Not resident of Wash St

MON, DEC 24, 2021, 03:41 PM

160 HAPPY VALLEY COLLEGE
FINANCIAL AID AUTOMATIC FILE REVIEW
REPORT OF SCHEDULING ERRORS

PAGE 2
REPORT SM9354C
VER012

THE AUTOMATIC FILE REVIEW PROCESS COULD NOT RUN SUCCESSFULLY DUE TO SCHEDULING ERRORS AND OR INVALID TABLE MASTER ENTRIES.
PLEASE CORRECT THE ERRORS IDENTIFIED BELOW BEFORE RESCHEDULING:

ERROR MESSAGE

Missing parameter value for Table Master parameter TERMTRK under item WRV.
NO RECORDS SELECTED FOR GIVEN PARAMETERS

***** END OF REPORT *****