



Scholastic ONline Information System
for the Web

Financial Aid

© 2002 – 2006 RJM Systems – all rights reserved

For Financial Aid we recommend using either EDEExpress or PowerFAIDS®. It is your choice. Once you decide which to use, you set the financial aid option and SONISWEB® uses your choice to import aid award records and to post award payments.

You can learn more about EDEExpress at <http://ifap.ed.gov/edexpress/> that offers Web-based training.

PowerFAIDS® is described at www.collegeboard.com/highered/fa/pfaids.html.

SONISWEB® adds function to EDEExpress and PowerFAIDS® to provide a complete solution.

This text starts with **navigating** the functions on page 6. There's a quick reference by subject on page 7. Since financial aid is a **process**, it's described with diagrams starting on page 10. The functions are described beginning on page 13 and setting the rules and value tables start on page 54. To see the **changes** in this edition look on page 4.

August 2006

The logo for RJM Systems, Inc. features the letters "RJM" in a stylized, blue, serif font. The "R" and "J" are connected, and the "M" is separate. To the right of "RJM" is the text "Systems, Inc." in a blue, serif font.

Table of Contents

TABLE OF CONTENTS	2
NEW IN THIS EDITION	4
<i>August 2006 Update</i>	4
<i>July 2006 Update</i>	4
<i>June 2006 Enhancements</i>	4
<i>May 2006 Enhancements</i>	4
<i>March 2006 Initial Release</i>	4
NAVIGATING THE FUNCTIONS	6
WHAT DO YOU WANT TO DO?.....	7
DIAGNOSING AND FIXING PROBLEMS.....	8
SETTING YOUR BROWSER FOR PROPER FUNCTION AND SECURITY.....	9
FINANCIAL AID PROCESSES	10
SEMESTER PREPARATION	10
<i>Getting Set for Awards</i>	12
<i>Giving Awards and Receiving Funds</i>	13
THE EDEXPRESS PROCESS	13
EXPORTING FROM EDEXPRESS	13
EDEXPRESS 2004-200X EXPORT FILE.....	14
SONISWEB® EDEXPRESS IMPORT OPTIONS.....	15
<i>Importing into SONISWEB® Records</i>	15
<i>Reconciling EDExpress and SONISWEB® Records After Import</i>	18
<i>Importing and Linking the EDExpress Database</i>	18
THE POWERFAIDS® PROCESS.....	20
POWERFAIDS® FILE	20
USING SONISWEB® POWERFAIDS® IMPORT	22
EXPORTING TO POWERFAIDS®.....	25
SATISFACTORY ACADEMIC PROGRESS (SAP) FUNCTION	26
FINANCIAL AID RECORDS, BUDGETS, LOANS, AND AWARDS	28
BUDGETS	29
<i>Entering a Budget</i>	29
<i>Modifying a Standard Budget</i>	30
LOANS	31
AWARDS	32
<i>Projected Enrollment</i>	34
<i>Adjusting Award</i>	34
<i>Accept-Reject Awards</i>	35
STUDENT ACCEPTANCE AND REJECTION OF AWARDS ONLINE	36
<i>EDExpress Database Information</i>	37
POSTING AWARD ESTIMATES-INTENTIONS AND AWARD PAYMENTS.....	39
POSTING AWARD ESTIMATES, OFFERS, AND INTENTIONS	40
POSTING AWARD PAYMENTS.....	43
VOIDING AN AWARD ESTIMATE-INTENTION OR A PAYMENT	46
AWARDS LETTER AND LABELS.....	48
FINDING, DOWNLOADING, AND INSTALLING EDEXPRESS.....	50

PELL GRANT PROCESSING	51
SETTING TABLES AND WEB OPTIONS FOR FINANCIAL AID.....	54
BUILDING THE AWARDS TABLE.....	54
ESTABLISHING STANDARD BUDGETS.....	56
SETTING THE LENDER AND GUARANTOR TABLES	57
PICKING THE WEB OPTION: EDEXPRESS OR POWERFAIDS®.....	58
SETTING UP THE EDEXPRESS TABLE.....	58
SETTING UP THE POWERFAIDS® TABLE	59
SETTING THE PELL GRANTS TABLE	59
SETTING THE SAP TABLE	60
CHECKING CORRECT FINANCIAL TRANSACTIONS FOR AWARDS	61
AWARD TRANSACTION	61
THE 'POST AWARD' SETTING IN A PAYMENT TRANSACTION.....	62
THE SEMESTER DESCRIPTION IN THE SEMESTER TABLE	62
LOCATING THE SOCIAL SECURITY NUMBER IN A STUDENT RECORD	63
LOCATING THE IPED STATUS IN A STUDENT RECORD FOR FISAP.....	63
AWARDS SUMMARY, FISAP, GPAS, AND NEED DISTRIBUTION REPORTS	64
AWARDS SUMMARY.....	64
AWARDS SUMMARY BY DATE.....	65
FINANCIAL AID REPORT	66
FISAP REPORTS.....	67
<i>FISAP Part II Report.....</i>	<i>67</i>
<i>FISAP Part VI Report.....</i>	<i>68</i>
GPA REPORT	69
NEED DISTRIBUTION REPORT	70
GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS.....	71

Adobe® is the registered trademark of Adobe Systems, Inc.
Cold Fusion™ is a trademark of the Macromedia Corporation a part of Adobe Systems, Inc.
Crystal Reports™ is a trademark of Business Objects SA.
Firefox is a trademark of the Mozilla Foundation.
Google® is the registered trademark of Google, Inc.
Lotus®, Lotus 1-2-3™, and WordPro™ are trademarks of Lotus Development Corporation a subsidiary of the IBM Corp.
Microsoft®, SQL Server™, and FoxPro™ are trademarks of the Microsoft Corporation.
Netscape® is a trademark of Netscape Communications Corporation.
OpenOffice and StarOffice™ is a trademarks of Sun® Microsystems, Inc.
SONISWEB®, SONIS®, RJM Systems, and related logos are trademarks of RJM Systems, Inc.
The Financial Edge® and The Raiser's Edge® are trademarks of Blackbaud®, Inc.

(Financial Aid.doc - 12/4/2007 12:25:00 PM)

NEW IN THIS EDITION

August 2006 Update

- Added description of “Reconciling EDEExpress and SONISWEB® Records After Import”, page 18.

July 2006 Update

- Correction of terms “Token” replaces “Award Code (fund)”, page 20 and 23.

June 2006 Enhancements

- “Financial Aid Records, Budgets, Loans, and Awards”, page 28.
- “Budgets”, page 29.
- “Entering a Budget”, page 29.
- “Modifying a Standard Budget”, page 30.
- “Loans”, page 31.
- “Awards”, page 32.
- “Building the Awards Table”, page 54.
- “Establishing Standard Budgets”, page 56.
- “Setting the Lender and Guarantor Tables”, page 57.
- “Financial Aid Report”, page 66.
- “Need Distribution Report”, page 70.

May 2006 Enhancements

- Changes in the Financial Aid record for the FISAP reports
- “Student Acceptance and Rejection of Awards Online”, page 36.
- “Locating the IPED Status in a Student Record for FISAP”, page 63.
- “FISAP Reports”, pages 67 through 68.

March 2006 Initial Release

- This edition is for SONISWEB® version 2.0.
- Figure 1 Toolbar for those with User-ID access and Figure 2 Function Lists1 - Partial on page 6.
- Figure 95 Login Displays and Figure 96 Typical SONISWEB® Page on page 71
- Most of the reports have been rewritten in the Cold Fusion™ Report Builder. Those have “(RB)” following their names as seen in Figure 2. The older Crystal Reports™-Enterprise reports (without the “RB”) are still available in most cases.
- “Importing into SONISWEB® Records” on page 18 that lets you see all of the EDEExpress information while working with a student’s records.

- Many updated displays (figures) where the look is different.

NAVIGATING THE FUNCTIONS



• Figure 1 Toolbar¹ for those with User-ID access

Administrative users have User-IDs and Passwords and see an initial display like Figure 1. Administrative users can be anyone in your system with an ID but typically they're paid Staff and those few Faculty with additional administrative duties.

The access rights of an administrative user is defined by:

1. The **Profile** selected when you were issued a User-ID and Password. Typical Profile categories are the Registrar, the Registrar's staff, the Financial Officer, Admissions staff, Deans, etc. One profile covers all the people in each staff category.
2. The individual limits specified for you when you were issued a User-ID and Password. Typical limits are preventing access to faculty and staff personal records.
3. The **privileges** added for you when you were issued a User-ID and Password. The right to "Make Grades Official" or "View and Change PINs" are examples.



• Figure 2 Function Lists¹ - Partial

After clicking **Systems** in Figure 1 you get the selections shown on the top right in Figure 2.

Click **Financials** to get the choices in the middle in Figure 2.

Click **Names**, do a name search, pick the person whose records you want, and you get the top left in Figure 2.

Click **Reports** for the bottom right of Figure 2.

¹ You only see what you're authorized to see by your Profile and individual Limits and Privileges. So your choices may be fewer than these.

WHAT DO YOU WANT TO DO?

Financial Aid involves processes, it isn't a set of isolated functions. See "Financial Aid Processes" on page 10 to understand them.

- Awards Letter, page 48.
- Awards Summary Report, page 64.
- Awards-Scholarships-Loans table, page 54.
- Budgets, page 29.
- Checking Correct Financial Transactions for Awards, page 61.
- **EDEXpress functions start on page 13.**
- EDEXpress table, page 58.
- Financial Aid Processes, page 10.
- **Financial Aid Records, Budgets, Loans, and Awards, page 31.**
- Financial Aid Report, page 66.
- Finding, Downloading, and Installing EDEXpress, page 50.
- FISAP Reports, page 67.
- FISAP settings in the Biographic record, page 63.
- FISAP settings in the Financial Aid record, page 29.
- Getting Set for Awards, page 12.
- GPA Report, page 69.
- Reconciling EDEXpress and SONISWEB® Records After Import

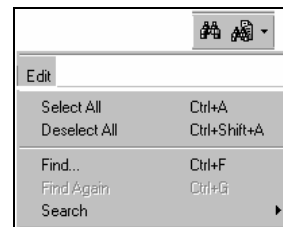
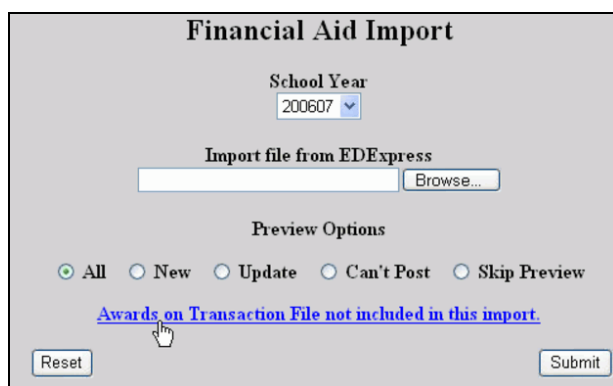


Figure 3 Adobe® Find and Search

Reconciliation is needed when a student has awards scheduled in her or his EDEXpress "package", the SONISWEB® records reflect it, and then the award is voided in EDEXpress, perhaps because the student has decided not to take the award.

If it's voided in the EDEXpress package but not in the SONISWEB® record, they don't match on import. After import you see a display like Figure 12.



• Figure 12 Reconciliation Link

Click the underlined Awards...not included in this import in Figure 12. You get Figure 13.

Financial Aid Import					
Name	Fund	POE	Amount	Posted to billing	Posted to Accounting
Cather, Willa	St. Teresa's Scholarship	200607 - 1	\$1.00	No	No
Cather, Willa	St. Teresa's Scholarship	200607 - 2	\$3,100.00	No	No

• Figure 13 Unmatched Award Records

This list shows you those with awards still posted in the SONISWEB® files but not found in the EDEXpress imports. You use this report to change either the SONISWEB® records or the EDEXpress package so they are correct and reconciled.

- Importing and Linking the EDEXpress Database, page 18.
- Importing to SONISWEB®, page 15.
- Loans, page 31.
- Need Distribution Report, page 70.
- Pell Grant Processing, page 51.
- Picking the Web Option: EDEXpress or PowerFAIDS®, page 58.
- Posting Award Estimates, Offers, and Intentions, page 40.
- Posting Award Payments, page 43.
- **PowerFAIDS® functions start on page 20.**
- PowerFAIDS® table, page 59.
- SAP table, page 60.
- Semester Preparation, page 10.
- Social Security Number in Student Records, page 63.
- Student Acceptance and Rejection of Awards Online, page 36
- The ‘Post Award’ Setting in a Payment Transaction, page 62.
- Voiding an Award Estimate-Intention or a Payment, page 46.
- If you don’t see what you need above, check the table of contents on page 2. You can also use the Adobe® find or search functions illustrated in Figure 3. It allows a Google®-like search² by word or phrase.

Diagnosing and Fixing Problems

See the text “Messages, Errors, and Diagnosis”.

² If you’re unfamiliar with this searching, click Adobe® reader Help or see the SONISWEB® text “Index to Texts”.

Setting Your Browser for Proper Function and Security

Internet Explorer³ (IE), Firefox™, Netscape®, and Opera Web browsers have an “auto-complete” or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text “Browser Settings” to set your browser for security, good performance, and to prevent your getting old data.

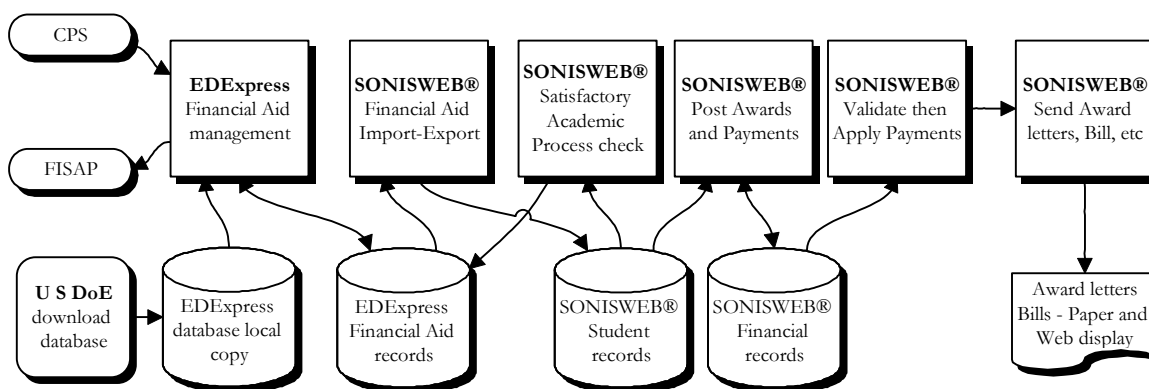
³ Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

FINANCIAL AID PROCESSES

There are two parts:

- Setting up the awards, defining satisfactory academic progress, defining the Power-FAIDS® tables, etc. They're done before each semester and are described on page 10.
- Setting up awards such as loans and scholarships you fund or manage. You set them up in the Awards Table, page 54.
- Making awards, receiving funds, applying moneys to student records, etc. These are done more frequently and are described on page 13.

U.S. DoE



• Figure 4 Data Flow for EDEExpress

Figure 4 shows the data flow for EDEExpress that starts with downloading the EDEExpress software and a copy of the database from the U. S. Department of Education. Power-FAIDS® works in a similar way. Once you've set up the awards and tables (page 54), you follow this process to send and receive student award files using EDEExpress or Power-FAIDS®. SONISWEB® handles the record-keeping, the posting of awards and payments, the validation process, and the Award letters and bills.

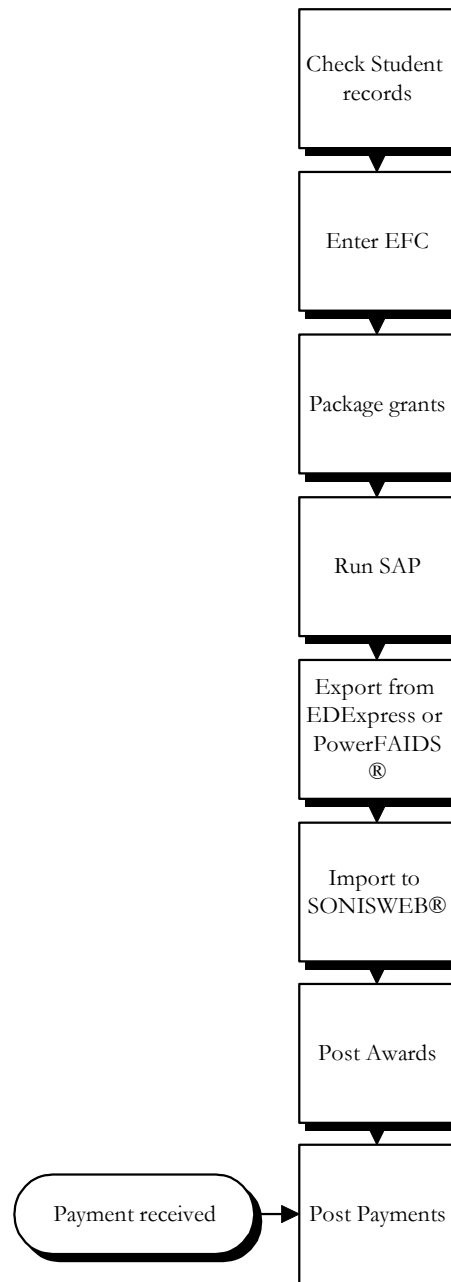
Semester Preparation

1. Revise the SONISWEB® tables to reflect the new government and institutional rules and amounts:
 - Set up the Awards table, Figure 67, page 54. This includes the yearly allocations you disburse for funds you manage.
 - In the Awards table make sure the Award Codes match what you'll get in the EDEExpress or PowerFAIDS® file.
 - Set up the financial aid tables, pages 58 to 59 if you're using EDEExpress or PowerFAIDS®.

- If you plan to use standard budgets and/or loans, set them up starting on page 56.
 - Enter the budget, loan fees, and adjustments, and the estimated family contribution in each student's Financial Aid record, page 28.
 - Optionally, enter the Projected Enrollment, page 34.
 - Update the Pell table with the current cost parameters, Figure 66 on page 53..
 - Set up one or more SONISWEB® financial transaction codes to handle the posting for award payments, page 61.
2. Check for – and download if necessary – a new version on EDEExpress or PowerFAIDS®. EDEExpress tends to have a new version each school year.
 3. Select the “packaging” software you’ll use, either EDEExpress or PowerFAIDS® in Web Options, page 58.
 4. Optionally for EDEExpress, use your authorized access to download a copy of the database for your school, page 18.
 5. For EDEExpress, connect the downloaded database to Cold Fusion™ so you can access it, page 18.

Getting Set for Awards

1. Make sure the students for grants or loan you don't fund – Pell and other government grants in particular – send their applications in. You won't see their records in the download or import if they haven't applied.
2. Check the students' records, especially for new students. You must have Social Security⁴ numbers in the "SSN" field in the biographic record of all students who will receive an award through EDEExpress or PowerFAIDS®. That's shown on page 63.
3. Enter the expected family contribution (EFC) and other financial information in each student's Financial Aid record if they're to receive Pell grants. See page 28.
4. Use EDEExpress or PowerFAIDS® software to "package" the grants and loans. The manuals or tutorials available for your chosen software provide the guidance.
5. Run Satisfactory Academic Progress (SAP) so SONISWEB® calculates each person's Academic Status and Enrollment Status and saves it in his or her Financial Aid record. This is what's used as a check in the award and fund receipt process. That's shown on page 18.
6. Export the information from EDEExpress or PowerFAIDS® so SONISWEB® can import it.
7. Import the information from EDEExpress or PowerFAIDS®. SONISWEB® puts it in the students' financial records, page 10.



• Figure 5 Financial Aid Process Flow

⁴ In order to match received aid records with SONISWEB® files, the numbers must exactly match. See "Locating the Social Security Number in a Student Record" on page 63.

Giving Awards and Receiving Funds

1. Post the Award offer, page 40.
2. Post the payments against the awards when the payments arrive, page 43.
3. Optionally, send out Award Letters. There's an example on page 48.
4. As needed, use the Awards Summary (page 64), and the "GPAs" reports (page 69) to track the process.

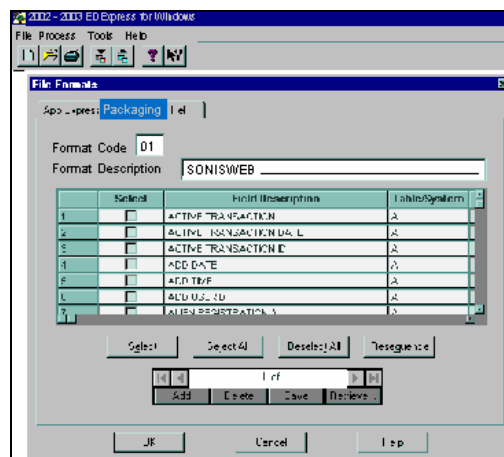
THE EDEXPRESS PROCESS

The process is shown in Figure 4. The actual financial aid packaging and the export is done using the EDEXpress software. You must install that software on your system and follow the instructions for that system. See "Finding, Downloading, and Installing EDEXpress" on page 50.

Once the EDEXpress records are ready, you export them from EDEXpress then import them into SONISWEB® as described below.

1. Start EDEXpress following the instructions that come with it.
2. In the Toolbar at the top of the EDEXpress display select Tools, then Setup Packaging, then Academic Year Profile

Your Financial Aid staff sets up as many profiles as needed. Each profile is identified by a unique 4-character code and uses the term numbers in each profile consistently as defined by the SONISWEB® semester table (page 58).



• Figure 6 EDEXpress Display Example

Exporting from EDEXpress

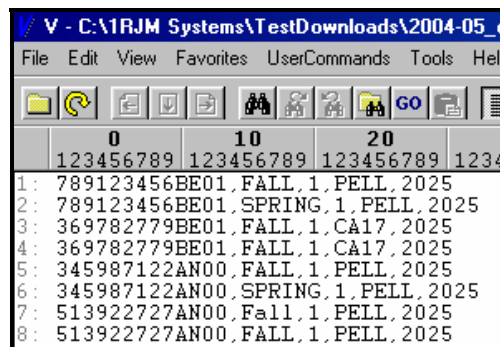
When the records are ready to be exported from EDEXpress and imported into SONISWEB®, follow these steps:

1. Use the guidance from the EDEXpress manuals to export a comma-separated variable length (CSV) file. That's what SONISWEB® needs to import.
2. Close EDEXpress and go to "SONISWEB® EDEXpress Import" on page 15.

EExpress 2004-200X Export File

This is the file that's exported from EExpress and imported to SONISWEB® (page 15).

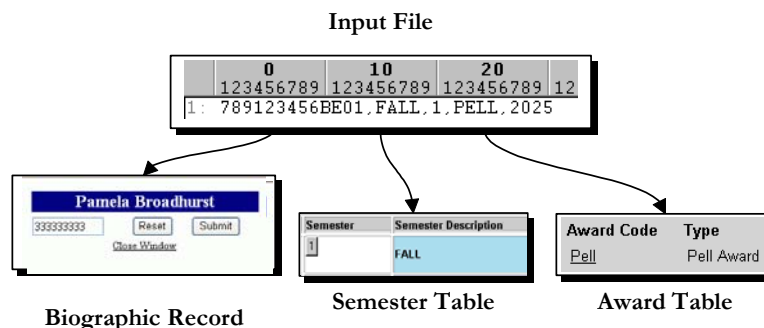
It is a comma-delimited simple text (.txt) file as illustrated in Figure 7. The fields are described below. Those in **bold** are used to create unique transaction records in SONISWEB®. Those not in bold are not used by SONISWEB®.



• Figure 7 EExpress 2004-200X File Format

- current **social security number** (9); this must be 9 characters, no more, no less. There's no separating comma. Figure 8 illustrates the matching.
- first two letters of last name (2); there's no separating comma.
- EExpress application number (2) ; there's no separating comma.
- comma
- **term** (variable length); you may call it "semester". This must be exactly the same as the **semester description** in the SONISWEB® Semester Table. See "The Semester Description in the Semester Table" on page 62. Figure 8 illustrates the matching.
- comma
- EExpress **enrollment status** (1) (1=Full, 2=3T, 3=Half, 4=Less than Half, 5=Not enrolled)
- comma
- **award code** (variable length). This must exactly match SONISWEB® **award code** in award table. See "Building the Awards Table" on page 54. Figure 8 illustrates the matching.
- comma
- **term award amount** (variable length).

The matching is illustrated in Figure 8.



• Figure 8 EExpress File Matching

SONISWEB® EExpress Import Options

Importing into SONISWEB® Records

Make sure you have selected the source of your financial aid data as described in “Setting Tables and Web Options for Financial Aid” on page 54. EExpress software has changed its export process. What’s documented here is the current process called the “EExpress 2004-200X” import filter⁵ in SONISWEB®.

1. Click **Financials** at the top of the display (Figure 1). You see a function list on the left of your display like Figure 2.
2. In Figure 2, click Financial Aid Import. That yields Figure 9.

Check “Import file from...” circled in Figure 9 to make sure it is set properly for EExpress. If it is not set as you expect, change it as described in “Setting Tables and Web Options for Financial Aid” (page 54).

3. Use the School Year pull-down⁶ to choose the year you are importing for.

You use the radio buttons⁶ in Figure 9 to limit the types of records you see in Figure 10.

- **All** shows all the records in Figure 10.
- **New** shows only the new records and not the updates.
- **Update** shows only the records that have been changed, none of the new entries.
- **Can’t Post** are the records that could not be imported
- **Skip Preview** causes all valid records to be imported without first previewing in Figure 10.

4. If you know the name of the file that you saved in “The EExpress Process” above, enter it in Figure 9.

To find the file by browsing, click the Browse button. Once you find the file, click it. Your display should now have a file name in it like that in Figure 9.

5. Click the Reset button to start over.
6. Click the Submit button in Figure 9 to preview or import the file. You see Figure 10.

• Figure 9 Financial Aid Import File Prompt

⁵ The prior versions are no longer used.

⁶ See Figure 97 on page 72.

Financial Aid Import						
Import	Name	Fund	Disburse	POE	Amount	*Posted to Transact. Previous Amount
<input type="checkbox"/>	SSN# 369782779	CA17	1	200304 - 1	\$2,025.00	NS
<input type="checkbox"/>	SSN# 369782779	CA17	1	200304 - 1	\$2,025.00	NS
<input type="checkbox"/>	SSN# 513922727	Pell Award	1	200304 - 1	\$2,025.00	NS
<input type="checkbox"/>	SSN# 513922727	Pell Award	1	200304 - 1	\$2,025.00	NS
<input checked="" type="checkbox"/>	Bellows, Wendy	Pell Award	1	200304 - 1	\$2,025.00	\$0.00
<input type="checkbox"/>	Bellows, Wendy	Pell Award	1	200304 - 2	\$2,025.00	* \$750.00
<input type="checkbox"/>	Bendix, William	Pell Award	1	200304 - 1	\$2,025.00	\$2,025.00
<input checked="" type="checkbox"/>	Bendix, William	Pell Award	1	200304 - 2	\$2,025.00	\$0.00

Reset
Submit

• Figure 10 Financial Aid Import Display

This is how to read Figure 10.

A **checkmark** or a white checkbox means that SONISWEB® was able to find a person with the same social security number⁴ in its files.

A **“grayed”** checkbox and an asterisk (*) means that this award has been imported already.

A **“grayed”** checkbox with no asterisk (*) means that no matching social security number⁴ was found.

Name: where a match is found, the person’s name in the SONISWEB® database is inserted. Where there is no match, the social security number is shown. You see that in Figure 10.

Fund must be one of the Award Codes in the Awards table. If it’s not in the table, the code appears in red in Figure 10.

Disburse shows the number of payments to be made for this award. For example, an award for a year paid one half in each semester will have a 2 in Disburse.

POE is the period covered by this record. In the import records it’s usually FALL, SPRING, YEAR, etc. It’s matched to the Semester table and the school-year/semester is inserted in Figure 10. If there is no match in the Semester table, “Invalid File” in red appears at the bottom of Figure 9.

Amount is for this award.

Previous Amount is either the amount previously recorded by SONISWEB® or “NS”. NS means “Not a Student” because there was no match with a social security number⁴.

7. Set the checkmarks so that the student records you want imported are checked. Those you do not want to import must have a blank checkbox. A “grayed” checkbox is the same as a blank one.
8. Click the Reset button to erase your settings if you need to start over.
9. Click the Submit button to import the records.

Financial Aid Import					
Name	Fund	Disburse	POE	Amount	Status
SSN# 369782779	CA17	1	200304 - 1	\$2,025.00	Not a student
SSN# 369782779	CA17	1	200304 - 1	\$2,025.00	Not a student
SSN# 513922727	Pell Award	1	200304 - 1	\$2,025.00	Not a student
SSN# 513922727	Pell Award	1	200304 - 1	\$2,025.00	Not a student
Bellows, Wendy	Pell Award	1	200304 - 1	\$2,025.00	No Change
Bellows, Wendy	Pell Award	1	200304 - 2	\$2,025.00	No Change
Bendix, William	Pell Award	1	200304 - 1	\$2,025.00	Updated
Bendix, William	Pell Award	1	200304 - 2	\$2,025.00	No Change

• Figure 11 Financial Aid Import Confirmation

10. Figure 11 is your confirmation. If nothing is imported, Figure 11 is replaced by a small display with a message that nothing was imported.

In Figure 11, the “Status” column is:

Added: this award is added to the person’s records.

Updated: the amount is updated if its matching award payment has not been posted.

The “Update” **Status** in Figure 11 does not remove dropped awards you previously posted. If the award has been dropped you must use “Voiding an Award Estimate-Intention or a Payment” on page 46. If it has already been posted, you cannot void it. In that case see your financial staff to have a reversing financial transaction entered.

No Change: nothing was **Added** or **Updated** for this person.

Not a Student: there was no SSN field in the SONISWEB® records that matched the Social Security number in the imported record.

Awards are intentions or estimates, not financial transactions. When a payment is received and posted (page 43), it becomes a financial transaction.

Reconciling EExpress and SONISWEB® Records After Import

Reconciliation is needed when a student has awards scheduled in her or his EExpress “package”, the SONISWEB® records reflect it, and then the award is voided in EExpress, perhaps because the student has decided not to take the award.

If it’s voided in the EExpress package but not in the SONISWEB® record, they don’t match on import. After import you see a display like Figure 12.

• Figure 12 Reconciliation Link

Click the underlined Awards...not included in this import in Figure 12. You get Figure 13.

Financial Aid Import					
Name	Fund	POE	Amount	Posted to billing	Posted to Accounting
Cather, Willa	St. Teresa's Scholarship	200607 - 1	\$1.00	No	No
Cather, Willa	St. Teresa's Scholarship	200607 - 2	\$3,100.00	No	No

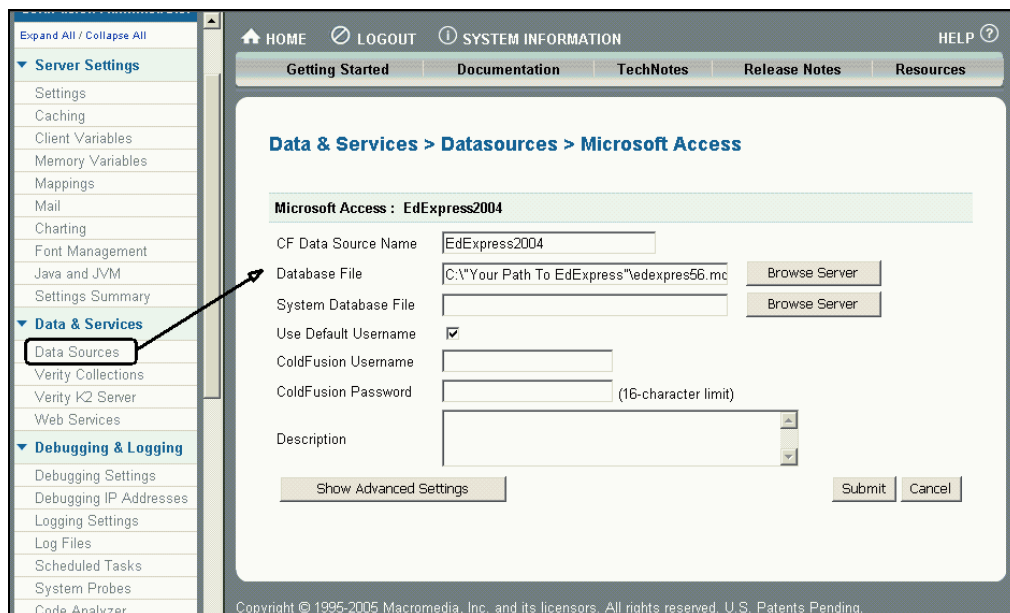
• Figure 13 Unmatched Award Records

This list shows you those with awards still posted in the SONISWEB® files but not found in the EExpress imports. You use this report to change either the SONISWEB® records or the EExpress package so they are correct and reconciled.

Importing and Linking the EExpress Database

“EExpress Database Information” on page 37 lets you see the entire student EExpress record. It’s optional.

1. Use your EExpress authorization to download the EExpress database.
The EExpress download procedures are controlled by DoE, so instructions on its Web site should be checked for changes.
2. To link it to SONISWEB® so you can see the records, start the Cold Fusion™ Administrator. You see Figure 14.



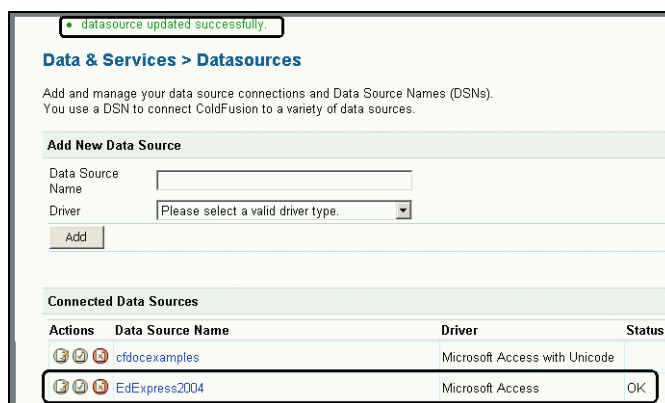
• Figure 14 Connecting the EDEExpress Database

3. In Figure 14 pick “Data Sources” from the function list on the left.
4. In “CF Data Source Name”, enter “EDEExpressyyyy” where yyyy is the first part of the school year. For example, if the school year is 200506, you enter 2005.

Typically you have several EDEExpress databases. SONISWEB® uses the year (yyyy) in the database name to make sure it gets the right one.

5. Use the “Browse Server” button to find the EDEExpress database you downloaded.
6. Click the Submit button. Figure 15 appears

7. At the top of Figure 15 you see that the database has been added. At the bottom the database name appears with a Status of “OK”.



• Figure 15 EDEExpress Database Connection Verified

THE POWERFAIDS® PROCESS

The process is shown in Figure 4 for EDEExpress is similar for PowerFAIDS®. The actual financial aid packaging is done in PowerFAIDS®. You must install that software on your system and follow the instructions for that system. Import from PowerFAIDS® is below. Export to PowerFAIDS® is covered on page 25.

PowerFAIDS® File

0	10	20	30	40	50	60	70	80	90	100	110
123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789
1: 129345382	LAUGHLIN	MICHAEL	C3829121	0419200404192004141331	PFADMIN			Pell Grant0131	2000	G-P001	
2: 129345382	LAUGHLIN	MICHAEL	C3829121	0419200404192004141331	PFADMIN			SEOG	0137	800	G-S002
3: 129345382	LAUGHLIN	MICHAEL	C3829121	0419200404192004141331	PFADMIN			Pell Grant0131	2000	G-P001	
4: 129345382	LAUGHLIN	MICHAEL	C3829121	0419200404192004141331	PFADMIN			SEOG	0137	800	G-S002
5: 161335820	BENNETT	VIRGINIA		0419200404192004141331	PFADMIN			Pell Grant0131	1000	G-P001	
6: 161335820	BENNETT	VIRGINIA		0419200404192004141331	PFADMIN			SEOG	0137	400	G-S002
7: 161335820	BENNETT	VIRGINIA		0419200404192004141331	PFADMIN			Pell Grant0131	1000	G-P001	
8: 161335820	BENNETT	VIRGINIA		0419200404192004141331	PFADMIN			SEOG	0137	400	G-S002
9: 715515788	BRADFORD	WILMA	BR5851255	0419200404192004141331	PFADMIN			Pell Grant0131	2000	G-P001	
10: 715515788	BRADFORD	WILMA	BR5851255	0419200404192004141331	PFADMIN			Pell Grant0131	2000	G-P001	
11: 813980751	LAJOIE	KATHRYN	LA2983824	0419200404192004141331	PFADMIN			Pell Grant0131	1000	G-P001	
12: 813980751	LAJOIE	KATHRYN	LA2983824	0419200404192004141331	PFADMIN			Pell Grant0131	1000	G-P001	

110	120	130	140	150	160	170	180	190
123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789
G-P001		31	G-P001			Fall		R
G-S002		31	G-S002			Fall		R
G-P001		32	G-P001			Spring		R
G-S002		32	G-S002			Spring		R
G-P001		31	G-P001			Fall		R
G-S002		31	G-S002			Fall		R
G-P001		32	G-P001			Spring		R
G-S002		32	G-S002			Spring		R
G-P001		31	G-P001			Fall		R
G-P001		32	G-P001			Spring		R
G-P001		31	G-P001			Fall		R
G-P001		32	G-P001			Spring		R

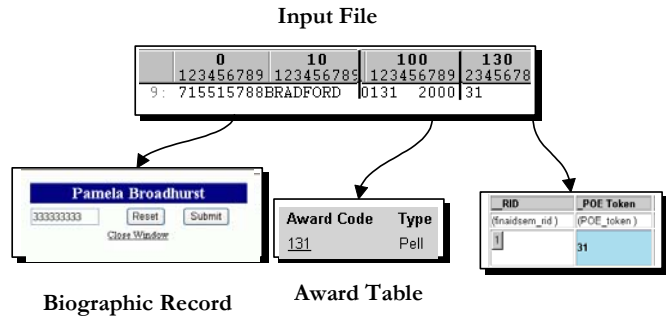
• Figure 16 PowerFAIDS® File Format

This is the file that's imported to SONISWEB® (page 22) after you've exported it from PowerFAIDS®.

It is a fixed-length-field simple file as illustrated in Figure 16. Only the fields used by SONISWEB® are described below in **bold**. They're used to create unique transaction records in SONISWEB®. The other fields are not used except to show on displays where there is no match with SONISWEB® records.

- **social security number** positions 1 through 9. It's matched against the Social Security number in the student's Biographic record as shown in Figure 17.
- **name of award**, positions 90 through 99. If there's a match with **award code** it's displayed in Figure 19.
- **Token**, positions 100 through 105. It's matched against the Award Code table as shown in Figure 17.
- **amount**, positions 106 through 111.
- **POE**, positions 132 through 138. It's matched against the PowerFAIDS® table (finaidsem) as shown in Figure 17.

The matching is illustrated in Figure 17.



• Figure 17 PowerFAIDS® File Matching

Using SONISWEB® PowerFAIDS® Import

Exporting to PowerFAIDS® is described on page 25. PowerFAIDS® import is similar to EDExpress import.

1. Click **Financials** at the top of the display (Figure 1). You see a function list on the left of your display like Figure 2.
2. In Figure 2, click Financial Aid Import. That yields Figure 18.

Check “Import file from...” circled in Figure 18 to make sure it is set properly for PowerFAIDS®. If it is not set as you expect, change it as described in “Setting Tables and Web Options for Financial Aid” (page 54).

3. You use the radio buttons⁶ in Figure 18 to limit the types of records you see in Figure 19.

• Figure 18 Financial Aid Import File Prompt

- **All** shows all the records in Figure 19.
 - **New** shows only the new records and not the updates.
 - **Update** shows only the records that have been changed, none of the new entries.
 - **Can't Post** are the records that could not be imported.
 - **Skip Preview** causes all valid records to be imported without first previewing in Figure 19.
4. If you know the name of the file that you saved when you exported⁷ it from PowerFAIDS®, enter it in Figure 18.

To find the file by browsing, click the Browse button. Once you find the file, click it. Your display should now have a file name in it as illustrated in Figure 18.

5. Click the Reset button to start over.
6. Click the Submit button in Figure 18 to import the file. You see Figure 19.

⁷ Exporting from PowerFAIDS® is contained in the guides furnished with that software.

Financial Aid Import						
Import	Name	Fund	Disburse	POE	Amount	*Posted to Trans Previous Amount
<input type="checkbox"/>	BENNETT, VIRGINIA	Pell Grant	1	Fall	\$1,000.00	NS
<input type="checkbox"/>	BENNETT, VIRGINIA	Pell Grant	1	Spring	\$1,000.00	NS
<input type="checkbox"/>	BENNETT, VIRGINIA	137	1	Fall	\$400.00	NS
<input type="checkbox"/>	BENNETT, VIRGINIA	137	1	Spring	\$400.00	NS
<input checked="" type="checkbox"/>	Bradford, Wilma	Pell Grant	1	Fall	\$2,000.00	\$0.00
<input checked="" type="checkbox"/>	Bradford, Wilma	Pell Grant	1	Spring	\$2,000.00	\$0.00
<input type="checkbox"/>	LaJoie, Kathryn	Pell Grant	1	Fall	\$1,000.00	\$0.00
<input type="checkbox"/>	LaJoie, Kathryn	Pell Grant	1	Spring	\$1,000.00	\$0.00
<input type="checkbox"/>	LAUGHLIN, MICHAEL	Pell Grant	1	Fall	\$2,000.00	NS
<input type="checkbox"/>	LAUGHLIN, MICHAEL	Pell Grant	1	Spring	\$2,000.00	NS
<input type="checkbox"/>	LAUGHLIN, MICHAEL	137	1	Fall	\$800.00	NS
<input type="checkbox"/>	LAUGHLIN, MICHAEL	137	1	Spring	\$800.00	NS

• Figure 19 Financial Aid Import Display

This is how to read Figure 19.

A **checkmark** or a white checkbox means that SONISWEB® was able to find a match with (1) the person’s social security number, (2) a fund code, and (3) a POE. All must match to import the record.

A “**grayed**” checkbox and an asterisk (*) means that this award has been imported already.

A “**grayed**” checkbox with no asterisk (*) means that no matching social security number⁴ and/or fund code and/or POE were found.

Name: where a match by social security number is found, the person’s name from the SONISWEB® database is inserted. Where there is no match, the name in the PowerFAIDS® file is inserted. You see that in Figure 19.

Fund (aka **Token** or **Award Code**) is the code of the award. It must exactly match one of the Award Codes in the Award Code table, as illustrated on page 54. When a matching code is found in the Awards Code table (page 54), the “name of award” from the input record (Figure 16) is displayed. If no match is made, the code from the input file is shown in red in Figure 19.

Disburse shows the number of payments to be made for this award. For example, an award for a year paid one half in each semester will have a 2 in Disburse.

POE is the period covered by this record, usually FALL, SPRING, YEAR, etc. This comes from the imported record. The POE entry in Figure 19 must exactly match the “POE Token” in the PowerFAIDS® Setup (Financial Aid Semesters) Table shown in **Figure 76**. If there’s a match, the “Semester Description” from that table is displayed.

Amount is for this award.

Previous Amount is either the amount previously recorded by SONISWEB® or “NS”. NS means “Not a Student” because there was no match with a social security number⁴.

7. Set the checkmarks so that the student records you want imported are checked. Those you do not want to import must have a blank checkbox. A “grayed” checkbox is the same as a blank one.
8. Click the Reset button to erase your settings and start over.
9. Click the Submit button to import the records.

Financial Aid Import					
Name	Fund	Disburse	POE	Amount	Status
BENNETT, VIRGINIA	Pell Grant	1	Fall	\$1,000.00	Not a student
BENNETT, VIRGINIA	Pell Grant	1	Spring	\$1,000.00	Not a student
BENNETT, VIRGINIA	137	1	Fall	\$400.00	Not a student
BENNETT, VIRGINIA	137	1	Spring	\$400.00	Not a student
Bradford, Wilma	Pell Grant	1	Fall	\$2,000.00	Added
Bradford, Wilma	Pell Grant	1	Spring	\$2,000.00	Added
LaJoie, Kathryn	Pell Grant	1	Fall	\$1,000.00	No Change
LaJoie, Kathryn	Pell Grant	1	Spring	\$1,000.00	No Change
LAUGHLIN, MICHAEL	Pell Grant	1	Fall	\$2,000.00	Not a student
LAUGHLIN, MICHAEL	Pell Grant	1	Spring	\$2,000.00	Not a student
LAUGHLIN, MICHAEL	137	1	Fall	\$800.00	Not a student
LAUGHLIN, MICHAEL	137	1	Spring	\$800.00	Not a student

• Figure 20 Financial Aid Import Confirmation

10. Figure 20 is your confirmation. If nothing is imported, Figure 20 is replaced by a small display with a message that nothing was imported.

In Figure 20, the “Status” column is:

Added: this award is added to the person’s records.

Updated: the amount is updated if its matching award payment has not been posted.

The “Update” **Status** in Figure 20 does not remove dropped awards you previously posted. If the award has been dropped you must use “Voiding an Award Estimate-Intention or a Payment” on page 46. If it has already been posted, you cannot void it. In that case see your financial staff to have a reversing financial transaction entered.

No Change: nothing was **Added** or **Updated** for this person. If you didn’t check the checkbox for a person, the record isn’t imported so No Change appears.

Not a Student: there were no matches on (1) the person’s social security number, (2) a fund code, and (3) a POE. All must match to import the record.

Awards are intentions or estimates, not financial transactions. When a payment is received and posted (page 43), it becomes a financial transaction.

Exporting to PowerFAIDS®

Importing from PowerFAIDS® is on page 20.

1. Click **Systems** in Figure 1 then Data Export in Figure 2. You get Figure 21.

• Figure 21 Data Export

2. As Figure 21 shows, you pick the group of people whose records you want exported, then pick PowerFAIDS
3. Enter a file name. (If you don't specify a file name, a name with today's date is created for you.)
4. Click the Reset button to clear what you just entered if you need to start over.
5. Click Submit and the records are collected and exported.



• Figure 22 Export for PowerFAIDS®

6. Figure 22 shows the confirming display. Figure 23 shows the format of the records you saved for export.

0	10	20	30	40	50	60	70	80	90
123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789	123456789
1: 191919191 Abbott Louis C333 Abbott Billing Address									

• Figure 23 Exported Records

7. Follow the PowerFAIDS® instructions to import and use these records.

Satisfactory Academic Progress (SAP) Function

Running this calculates the students' progress against the table shown on page 60 and puts the student's SAP status in the Financial Aid record shown in Figure 27.

1. Click **Systems** in Figure 1 then Satisfactory Academic Progress in Figure 2. That yields Figure 24.

• Figure 24 SAP Prompt

2. If you want to calculate the SAP for a group of students, click the Clear Names button in Figure 24 then chose the Record Status, Division, etc. for the students whose records you want examined.

For an individual, enter his or her name or ID, click Search and pick from the list of names offered. You get Figure 24 again but with name filled in. Click Search again to get Figure 25.

• Figure 25 SAP Selections

3. In Figure 25:
 - SAP [yes]** means you want only SAP, not the enrollment status.
 - SAP [no]** means only enrollment status, not the SAP.
 - SAP [both]** means both SAP and enrollment status.
4. Click the Submit button. You get Figure 26.

Both the SAP-GPA table (page 60) and the Enrollment Status table (page 52) must be properly set to get accurate statuses.

5. Figure 26 shows the results. The SAP results are placed in each student's Financial Aid record shown in Figure 27.

Satisfactory Academic Progress		
Name	PID	Good Standing
Anderson, Nicole J	AN5225389	No
Arston, Arnold A	AR9939292	Yes
Black, Jack	BL4712133	Yes
Jones, Thomas	JO3745642	Yes

• Figure 26 SAP Display

If the results in Figure 26 seem incomplete or you have other questions, run the “GPAs” report shown on page 69 to see the GPAs of the students. From that you can determine students’ whose Courses records require review and, perhaps, correction.

FINANCIAL AID RECORDS, BUDGETS, LOANS, AND AWARDS

Using **Names** (Figure 1) to access a student's records, click Financial Aid (Figure 2) to get Figure 27.

Williams, Billy (Student - WI3647496)

Financial Aid

Click school year to see an existing record

School Year	Budget	Adjustment	Loan Fees	Estimated Family Contribution	Adjusted Gross Income
200506	11,550.00	0.00	0.00	8,500.00	5,400.00
200405	6,050.00	0.00	235.00	8,500.00	25,000.00

Click Add to establish financial aid for a new year Add

Loans

Click a school year to see existing loan records

School Year	Loan Begin	Loan End	Lender ID	Amount
There are not any Loans for this Student.				

Click ADD to enter a new load record Add

Loan Entrance Completed Loan Exit Completed

Satisfactory Academic Progress

School Year 200405	Semester 1	Good Standing Yes
-----------------------	---------------	----------------------

These come from running Satisfactory Academic Progress

Memo

Reset Submit

• Figure 27 Financial Aid Record

Budgets: at the top of Figure 27 you change existing budgets and needs or add a new one. See “Budgets”, page 29.

Loans: in the center of Figure 27 you change existing loans or add new loans, see “Loans”, page 31.

Awards: with the optional Budget and Loans set, you enter the information regarding awards, page 32.

At the bottom are the results of running Satisfactory Academic Progress as described on page 26.

Social Security is a checkbox⁶ for those receiving payments from the U S Social Security agency.

Pell Eligible means this student meets the requirements for a Pell grant.

To return to Figure 27 without saving any of your entries, click the Return button.

To erase what you entered and start over, click the Reset button.

With the fields filled in, click the Submit button.

Modifying a Standard Budget

Clicking **Budget** in Figure 28 give you a prompting display from which you can pick one of the standard budgets, see page 56.

You can modify the amounts in the budget as shown by the outlined example in Figure 29.

To erase what you entered and start over, click the Reset button.

Click the Submit button to save it. The budget – modified as needed – now becomes the individual budget for this person. The total is placed in the Budget field in Figure 28 and the “NEED” is calculated as illustrated in Figure 32.

To choose a different standard budget, use the Delete button in Figure 29 and then click **Budget** again in Figure 28 for the selection prompt.

Budget ID	In State Budget on campus
Tuition	2,250.00
Health Fee	352.00
Assess Test Fee	50.00
Student Services	125.00
Books	250.00
Transportation	2500
Room/Board	3,000.00
Allowance	1,000.00

• Figure 29 Selected Standard Budget

Loans

Loans in the center of Figure 27 use entries from “Setting the Lender and Guarantor Tables” on page 57. In the loan section of Figure 27:

Loan Entrance and the **Completed** checkbox⁶ are used to specify that the student requesting a loan for the first time has received information about loans. It states that the student was sent information on that date, and “Completed” meaning the student acknowledged receiving and/or understands the loan.

Loan Exit and the **Completed** checkbox⁶ are used to specify that the student has stopped receiving loans and has been sent information about repaying them.

For specific loans you modify one by clicking the underlined year in Figure 27. For a new loan, click the Add button.

Figure 30 shows adding a loan. Pick the school year that will become the ID in Figure 27. You fill in these fields:

Lender ID is one of those set up in the “Lender Table” (page 57).

Enroll Status is from the “Enrollment Status” table used throughout financial aid.

Guarantor ID is from the “Guarantor Table” (page 57).

Grad. Date is the anticipated graduation date for loan purposes. (It may be different from that date in the student’s Education record.)

Loan Begin and **Loan End** are usually related to the terms of the lender and/or guarantor and the period of study for the student.

Loans			
School Year	200405		
Driver License	NC 27861423579712M	State	NC
Lender ID	Private Loan	Enroll Status	FULL TIME
School ID	DevS2	Level	Junior
Guarantor ID	Citibank	Grad. Date	06/01/2007
Loan Begin	07/15/2004	Loan End	06/01/2017
Dish. 1 Date	Hold	Dish. 2 Date	Hold
08/01/2004	<input type="checkbox"/>		<input type="checkbox"/>
Dish. 3 Date	Hold	Dish. 4 Date	Hold
	<input type="checkbox"/>		<input type="checkbox"/>
Subsidized Amount	0.00	Unsubsidized Amount	3,500.00
Serial Loan Code	New	PNote Delivery	Paper
Process Type	Print Application, Promissory Note and Guarantee Loan		
Certification Date	06/15/2004	Request EFT	NO
Reset		Delete	
Submit			

• Figure 30 Financial Aid Loan Record

Disb. 1 Date is the date of the first disbursement of loan funds. Up to four are available as is a checkmark to show a “Hold” on a disbursement. You must enter at least one “Disb.” date in the record.

Subsidized and **Unsubsidized** are the amounts of the loan.

Serial Loan code, Pnote Delivery, and Process Type (Figure 31) come from standard loan terms built into SONISWEB®.

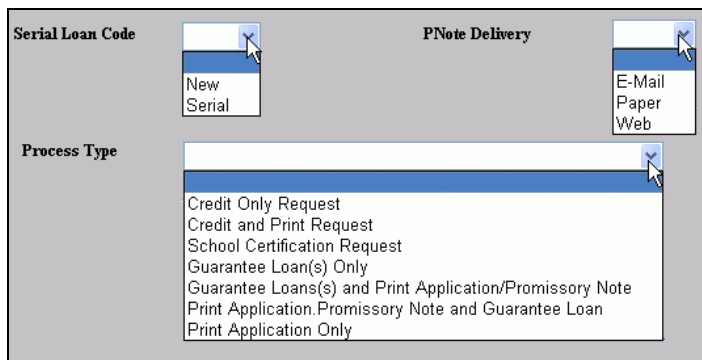
Certification Date is based on school and lender-guarantor rules. It’s usually when the loan is ready for issuance.

Request EFT specifies whether Electronic Funds Transfer is to be used to send the funds to the student.

To erase what you entered and start over, click the Reset button in Figure 30.

With the fields filled in, click the Submit button so save the loan record.

For an exiting loan record you can change the all but the “School Year”. You can use the Delete button to remove the loan.



• Figure 31 Enlarged from the Bottom of Figure 30

Awards

After filling in the budget information, Figure 28 looks like Figure 32. This is where you begin dealing with awards. For government-sourced or -guaranteed awards, you need to:

- Fill in all the information in Figure 28 including budget data as shown in Figure 28,
- If there’s no entry in “Satisfactory Academic Progress” for the current year, run that function as described on page 26.

Williams, Billy (Student - WI3647496)

Financial Aid

School Year	200405	Veteran	Yes	BA Degree	No	Driver License	NC 27861423579712M
--------------------	--------	----------------	-----	------------------	----	-----------------------	-----------------------

Budget	+	Loan Fees	+	Adjustment	=	COA -		EFC	=	NEED
9,527.00		0.00		0.00		9,527.00		8,500.00		1,027.00

	=	0.00
Total Pell, Scholarship and Campus Awards	=	0.00
Adjusted NEED	=	1,027.00
Total Subsidized Loans	=	0.00
Remaining NEED	=	1,027.00
Total UnSubsidized Loans(replacing EFC)	=	0.00

Automatic Zero EFC	<input type="checkbox"/>	Adjusted Gross Income	5,400.00	Housing Status	<input type="text" value="On Campus"/>	Dependency Status	<input type="text" value="Dependent"/>
		Social Security	<input type="checkbox"/>			Pell Eligible	<input checked="" type="checkbox"/>

* You must delete Budget before you delete Financial Aid Record.

[Projected Enrollment](#)
[Adjusting Award](#)
[Accept/Reject Award](#)
[EDEXpress Information](#)
[Accept/Reject Award](#)

• Figure 32 Financial Aid Detail for a Year

The Award Transactions summary at the bottom of Figure 32 is grouped by Award. Each award grouping shows the amounts offered minus loan fees and amounts received for every transaction in the year ordered by semester.

For awards, the amount “Offered” is set in [Adjusting Award](#). The amount “Received” comes from posting an actual receipt in “Posting Award Payments” on page 43.

Click the Reset button in Figure 32 to remove what you’ve just entered and start over.

Click the Submit button to save what you’ve entered in Figure 32.

At the bottom of Figure 32 you have these options:

- [Projected Enrollment](#), see below
- [Adjusting Award](#), see page 34.
- [Accept/Reject Award](#), page 35.
- [EDEXpress Information](#), page 37.

Projected Enrollment

Financial Aid

Student: **Bellows, Wendy** (Student - BE2253076)

Semester

- Fall
- Spring
- Summer

Enroll Status

- FULL TIME
- FULL TIME
- FULL TIME
- HALF TIME
- Not Enrolled
- PART TIME
- THREE-QUARTER TIME

Buttons: **Reset**, **Submit**

• Figure 33 Projected Financial Aid Entry

You can enter the projected future enrollment status for a student in his or her Financial Aid record.

1. In Figure 32 click Projected Enrollment to get Figure 33.
2. Select the Enroll Status in Figure 33 from the Enrollment Status table you configured, see Figure 63 on page 52.
3. Click the Reset button in Figure 32 to remove what you’ve just entered and start over.

Click the Submit button to save what you’ve entered in Figure 32.

Adjusting Award

Financial Aid

Student: **Williams, Billy** (Student - WI3647496)

Select semester(s)

Pick the semester: **Fall**

Select award(s)

Select the Award source: **Smith Memorial Scholarship**

Buttons: **Reset**, **Submit**

• Figure 34 Adjusting Award

You use Figure 34 for those situations where the number of disbursements for an award has changed since you first entered it. Unlike the standard Post Transactions shown in Figure 43, you can enter a zero amount in Figure 35 to create a “dummy” award. You can also use this function for other adjustments.

1. In Figure 32 click Adjusting Award to get Figure 34.
2. Pick the Semester and Award in Figure 34.
3. To clear what you entered so you can start over, click the Reset button in Figure 34.

Click the Submit button to get Figure 35.

Financial Aid

Williams, Billy (Student - W13647496)

Allocation: Previous: In Process: Remaining:

School Year: 200405 Semester: 1

Type: Smith Memorial Scholarship Check No.

Amount:

• Figure 35 Award Detail for Adjusting

The Allocation amounts at the top of Figure 35 tell you the status of the available award funds. See Figure 46 for a full explanation of these sums.

4. Enter the Amount of the award at the bottom of Figure 35.
5. Optionally you can enter the check number of an award.
6. Click the Reset button in Figure 34 to remove what you've just entered and start over.
7. Click the Preview button to save your entry and return to Figure 34. In Figure 34 you'll see the new entry you posted from Figure 35.

Accept-Reject Awards

Click [Accept/Reject Award](#) in Figure 32 to get Figure 36.

Award Transactions for 200405

Smith Memorial Scholarship	Offered	Received	Accept (y/n)
Fall	\$4,500.00	\$0.00	y

• Figure 36 Accept-Reject Award

Figure 36 is a list of all the awards set up in [Adjusting Award](#) (page 34)

The “Accept (y/n)” on the right of Figure 36 lets you indicate that the student has accepted (y) or has declined (n) this award. It appears in the Award list in Figure 32. A blank for “Accept” means no decision has been made.

Student Acceptance and Rejection of Awards Online

If you permit it (see below) students can review their awards and accept them or not directly online. Figure 37 shows it.

The student clicks the Billing tab and, at the bottom, sees Pending Awards.

Clicking Pending Awards yields Figure 38 or a message saying there are no pending awards.

Clicking the radio buttons⁶ in Figure 38 for Yes, No, and Blank is equivalent to the entries in Figure 36.

Figure 39 is where permission is given to show and used Pending Awards. It's part of **Systems Web Options**. A Display checkmark for Awards in Figure 39 means the student can see the pending awards in Figure 38 but does not have the radio buttons⁶. An Edit checkmark in Figure 39 gives the radio buttons⁶ in Figure 38.

• Figure 37 Student Online Acceptance or Rejection of Awards

• Figure 38 Pending Awards Display

• Figure 39 Option for Student Access to Awards

EDEXpress Database Information

This lets you view the EDEXpress database record for the student. That's useful when setting up the financial information at the top of Figure 32.

1. Click EDEXpress Information in Figure 32.

If you see "No EDEXpress Information Available" instead of the underlined link, it means the EDEXpress database for the year selected in Figure 32 has not been imported and/or has not been properly linked as described in "Reconciling EDEXpress and SONISWEB® Records After Import"

Reconciliation is needed when a student has awards scheduled in her or his EDEXpress "package", the SONISWEB® records reflect it, and then the award is voided in EDEXpress, perhaps because the student has decided not to take the award.

If it's voided in the EDEXpress package but not in the SONISWEB® record, they don't match on import. After import you see a display like Figure 12.

• Figure 12 Reconciliation Link

Click the underlined Awards...not included in this import in Figure 12. You get Figure 13.

Financial Aid Import					
Name	Fund	POE	Amount	Posted to billing	Posted to Accounting
Cather, Willa	St. Teresa's Scholarship	200607 - 1	\$1.00	No	No
Cather, Willa	St. Teresa's Scholarship	200607 - 2	\$3,100.00	No	No

• Figure 13 Unmatched Award Records

This list shows you those with awards still posted in the SONISWEB® files but not found in the EDEXpress imports. You use this report to change either the SONISWEB® records or the EDEXpress package so they are correct and reconciled.

Importing and Linking the EDEXpress Database" on page 18.

1. Figure 40 means that the database was found but that the Social Security Number in the student's Biographic record

There is no information in EdExpress for this student.

• Figure 40 No Student Information in the Local Copy of the EDEXpress Database

didn't match any in the database.

2. Where the student Social Security Number matches, Figure 41 shows the information from the copy of the EDExpress database on your SONISWEB® server.

Student Transaction Number	006808533OS02
Student Full Name	Amy Adams
Student SSN	006808533
Student A.G.I.	1378
Student Earnings	1378
Spouse Earnings	2000000002
Total Worksheet A	0
Total Worksheet B	0
Total Worksheet C	0
Cash/Savings/Checking	700
Net Worth Investments	0
Net Worth Business/Farm	0
Number of Family Members	
Number in College	
E.F.C.	0
Dependent/Independent	D
Student Loan Information:	
Subsidized Loan Total	1312
Unsubsidized Loan Total	2000
Total Combined Loans	3312
Perkins Loan	N/A
<input type="button" value="Return"/>	

• Figure 41 Student Information from the EDExpress Database Copy

POSTING AWARD ESTIMATES-INTENTIONS AND AWARD PAYMENTS

Posting the award is an offer and an estimate or intention. Posting a payment is a financial transaction. They are legally and financially very different, so they are treated separately below. Both use Post Transactions. To start either process, follow these steps.

Make sure you know which SONISWEB® transaction code is set for the posting of awards offers and award payments. See “Checking Correct Financial Transactions for Awards” on page 61.

1. Click **Financials** in Figure 1.

It is common for Post Transactions to be restricted to meet fiduciary and financial audit requirements.

2. In Figure 2, click Post Transactions. That yields Figure 42, Figure 43, or Figure 47.

Financial Search
Preparing: Post Transactions

Last Name: OR First Name:

OR

ID:

Record Status	Div.	Campus	Department	Level
<input type="button" value="Student"/>	<input type="button" value="Daytime"/>	<input type="button" value="Asian Campus"/>	<input type="button" value="Liberal Arts"/>	<input type="button" value="Sophomore"/>
<input type="button" value="Faculty"/>	<input type="button" value="Evening"/>	<input type="button" value="Centerville East Campus"/>	<input type="button" value="Nursing & Allied Health"/>	<input type="button" value="Junior"/>
<input type="button" value="Staff"/>	<input type="button" value="Fall"/>	<input type="button" value="Centerville Main Campus"/>	<input type="button" value="Science & Technology"/>	<input type="button" value="Senior"/>

School Year: Semester:

Enroll Status:

FULL TIME

HALF TIME

PART TIME

THREE-QUARTER TIME

• Figure 42 Post Transactions Prompt for Several Persons

You get Figure 42 if:

- You were not processing a person’s record at the time you clicked Post Transactions, or
 - You clicked the Clear Name button in Figure 43 or Figure 47.
3. Fill in Figure 42 to pick the group of people you want to enter this transactions for. If you only want to enter it for one person, enter the name or ID.
 4. Click the Search button in Figure 42 to get Figure 43 or Figure 47
 5. Now go to either “Posting Award Estimates, Offers, and Intentions” (below) or “Posting Award Payments” on page 43 depending on which you are posting.
 6. Optionally, send the Award Letters described on page 48.

Posting Award Estimates, Offers, and Intentions

This is for posting award offers or intentions not for posting payments. You post payments on page 43.

Processing Pell awards includes additional checks described on page 51.

Bellows, Wendy (Student - BE2253076)

Post Transactions

Transactions posted based on the following criteria:

ID:BE2253076 (Bellows, Wendy)
Students: Bellows, Wendy
Matches: 1

Transactions	School Year	Semester	Posting Date
AW-Award	200304	SPRING	07/26/2004

Amount	Division	Campus	Notes/Check Number
1250	Daytime	Centerville Main Campus	

• Figure 43 Post Award

1. If you want to post for a group of people, click the Clear Name button in Figure 43. That takes you to Figure 42.
2. Use the pulldowns⁶ in Figure 43 to select the Awards transaction, the year, etc. The Posting Date is today's date but you can change it by typing over it.

The Transaction must be one that allows the posting of awards offers or intentions. See "Checking Correct Financial Transactions for Awards" on page 61.

3. Enter the amount of the award offer or intention.
4. Click the Quit button if you do not want to continue with this posting.
5. Click the "Continue to Post" button to move to the next posting step.
 (In this case, the Preview button has the same effect as the Continue button.)

• Figure 44 Award Selection

6. In Figure 44 click the “Award Type” pulldown⁶ and select the name of the award, scholarship, loan, etc.
7. Click the Continue button to get Figure 45 (it’s hidden behind the pulldown list in Figure 44).

• Figure 45 Award Intention Post

Check Figure 45 to make sure all the entries are correct. You also see the status of the fund balance⁸ that you set up in “Building the Awards Table” on page 54.

8. To start over, click the Quit button.
9. If the data in Figure 45 are correct, click the Continue button.
10. You get confirmation at the bottom of the next display with a message like that on the right.

1 transactions have been posted.

⁸ The fund balance is really designed for those funds you allocate, not the government loans like Pell. With non-government loans, you set the allocation – usually for the year – and you see as you post each award how much of the allocation remains.

Allocation: <input type="text" value="17500.00"/>	Previous: <input type="text" value="0.00"/>	In Process: <input type="text" value="600.00"/>	Remaining: <input type="text" value="16900.00"/>
--	--	--	---

- Figure 46 Funds Management Fields from Figure 45

Figure 46 is read this way:

Allocation are the funds available for allocation for this grant, loan, or scholarship. It's set in Figure 68 on page 55.

Previous is what you've offered this person previously from this fund.

In Process is the sum of what you entered in Figure 43 and **Previous**.

Remaining⁸ is **Allocation** minus of all of the awards for all those to whom you made an award from this fund.

Posting Award Payments

This is for posting award payments – checks received, actual funds transferred – not for posting estimates, offers, or intentions. Those are posted on page 40.

Posting Pell grant payments involves special processing. See “Pell Grant Processing” on page 51 if you are applying Pell payments.

Bellows, Wilma (Student - BE2253076)

Post Transactions
Transactions posted based on the following criteria:

ID:BE2253076 (Bellows, Wilma C)
Students: Bellows, Wilma C
Matches: 1

Transactions	School Year	Semester	Posting Date
PP-Provider Payment	200304	Spring	03/30/2004

Amount	Division	Campus	Notes/Check Number
750	Daytime	Centerville Main Campus	

• Figure 47 Post Transactions

1. If you want to post for a group of people, click the Clear Name button in Figure 47. That takes you to Figure 42.
2. Use the pulldowns⁶ in Figure 47 to select the transaction, the year, etc. The Posting Date is today’s date but you can change it by typing over it.

The Transaction must be one that allows the posting of award payments. See “Checking Correct Financial Transactions for Awards” on page 61.

3. Enter the amount of the payment.
4. Click the Quit button if you do not want to continue with this posting.
5. Click the “Continue to Post” button to move to the next posting step.
(In this case, the Preview button has the same effect as the Continue button.)

You know you picked an invalid transaction code in Figure 47 if you do not see the option of picking an award in Figure 48.

6. In Figure 48, you pick the award to which this payment applies.

If the award you pick is

Pell Award ▾

it is handled in a special way as described on page 51.

7. If you want the award checkboxes⁶ to have checkmarks in them, like that shown in Figure 50, click Check Awards in Figure 48 until a checkmark appears. Where there are multiple award disbursements for a person, only the first one will have a checkmark in it. If you want to post the others a well, you'll need to put checkmarks in them.

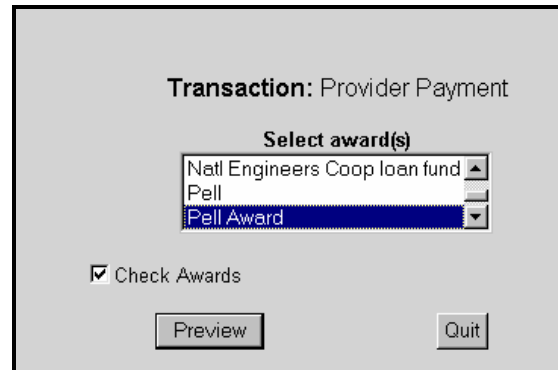
If you want the award checkboxes⁶ to be blank so you can check those you want posted, make sure Check Awards in Figure 48 is blank.

8. Click the Quit button to stop this transaction.
9. Click the "Select award(s)" pulldowns⁶ and pick the award, then click the Preview button. You see a list of the awards entered for this person.

Cannot post transaction(s). NO AWARDS EXIST for chosen profile(s).

• Figure 49 Award Posting Error

10. If an award could not be found to match the transaction, you get an error message like that in Figure 49. Nothing is posted.



• Figure 48 Award Selection

Bellows, Wilma (Student - BE2253076)

Post Transactions

Transactions posted based on the following criteria:
Year/Semester: 200304/2

ID:BE2253076 (Bellows, Wilma C)
Students: Bellows, Wilma C
Matches: 1

Transaction: Provider Payment

Post Name	Award Name	Offered	Amount	Div.	Campus	Notes/Check Number
<input checked="" type="checkbox"/> 01) Bellows, Wilma C	Pell Award	\$750.00	750	Daytime	Centerville Main Campus	

*Offered amount may differ from Pell amount due to enrollment status changes.
**Financial Aid on Hold.

• Figure 50 Payment Confirmation

A student can have multiple awards from several sources, loans, grants, scholarships, etc. A student can also have an award with multiple disbursements (payments) for that award. All will be listed in Figure 50. Where you checked “Check Awards” in Figure 48, the first disbursement for each award is checked in Figure 50. If this payment covers more than one disbursement, you can check the appropriate blank checkboxes in Figure 50 that apply.

Figure 50 is a confirmation display. It names the award and the amount of the offer as well as the payment.

11. To post a payment, make sure the appropriate checkbox⁶ has a checkmark in Figure 50. Where the payment doesn't apply make sure the checkbox is blank.
12. Click the Quit button to end this transaction without posting it.
13. When you are satisfied with the entries in Figure 50, click the checkbox⁶ beside every name you wish to post⁹, then click the Continue button.

Are you sure you want to post these **1** transactions valued at **\$600.00**

Generate a receipt

Clear name after posting

• Figure 51 Post Payment Confirmation

14. Your final opportunity to post or quit is in Figure 51.
15. Click the Quit button to end this without posting.

⁹ You can – and often will – receive a payment check for several persons and post all of them in one transaction.

16. Click the Post button to post the payment.

Voiding an Award Estimate-Intention or a Payment

It's common for access to Void Transactions to be restricted to meet fiduciary and financial audit requirements. As long as the award payment has not been posted to accounting¹⁰, you can void the payment and the award.

You have to void the payment first using Void Transactions. Then invoke Void Transactions to void Award transaction. Each is a separate Void Transactions step.

Once the award payment has been posted, you'll need to post reversing (negative) transactions for the payment and for the award. When these reversing transactions are posted to accounting, they'll offset the original payment. This follows standard accounting practices.

1. Click **Financials** at the top of the display (Figure 1). You see a function list on the left of your display like Figure 2.
2. In Figure 2, click Void Transactions. That yields Figure 52.

Bellows, Wendy (Student - BE2253076)

Void Transactions

Transactions voided based on the following criteria:
Year/Semester: 200102 /1

ID:BE2253076 (Bellows, Wendy)

Students: Bellows, Wendy

Matches: 1

Transactions								
Void	Amount	Date	Ref ID	Year	Sem.	Div.	Campus	Check No.
01 Void: <input type="checkbox"/>	0.00	10/09/2002	White Foundation Engineering Schola	200001	2	Evening	Centerville	
02 Void: <input type="checkbox"/>	3.50	07/25/2002	Activity Fee	200001	2	Daytime	Asian Campus	
03 Void: <input type="checkbox"/>	2.00	06/18/2002	Activity Fee	200001	2	Daytime	Asian Campus	

• Figure 52 Void Award Intention or Offering

An award estimate, intention, or offer looks like Figure 52. An award payment looks like Figure 53.

Transactions								
Void	Amount	Date	Ref ID	Year	Sem.	Div.	Campus	Check No.
01 Void: <input checked="" type="checkbox"/>	1,500.00	10/09/2002	Provider Payment	200001	2	Evening	Centerville	
02 Void: <input type="checkbox"/>	3.50	07/25/2002	Activity Fee	200001	2	Daytime	Asian Campus	
03 Void: <input type="checkbox"/>	2.00	06/18/2002	Activity Fee	200001	2	Daytime	Asian Campus	

• Figure 53 Void Award Payment

¹⁰ Post to Accounting is covered in the SONISWEB® manual "Financial Record-keeping & Billing".

3. Once the payment is made against an award, it no longer appears in the list as an offering in Figure 52 or Figure 53.
4. To void a transaction in Figure 52 or Figure 53, click the checkbox⁶ for that transaction until a checkmark appears.
5. To stop voiding, click the Quit button.
6. To void the transaction or transactions, after setting the checkmarks, click the Continue button.
7. You get a confirming display asking if you really mean it.

AWARDS LETTER AND LABELS

This is optional. Not all schools use these letters.

1. Click **Financials** in Figure 1. In the function list, click Award Letter(RB)¹¹ or Award Letter. You get Figure 54.

• Figure 54 Award Letter "Report" Prompt

2. Figure 54 shows the standard reports prompt. Select from the criteria in the prompt and click Search.

To get a letter for one specific student, use **Names** in Figure 1 to search for that student. Once you have the student's records, click **Financials** in Figure 1, pick Award Letter and you'll get Figure 54 with filled in. To clear an ID so you get all the persons meeting your criteria, click the Clear Names button in Figure 54.

3. Once the search is complete you get Figure 55. Pre-viewing the letter yields Figure 57. Picking the Labels gives pages of labels of which Figure 56 shows a part.

• Figure 55 Award Letter Selection

• Figure 56 Label Example

¹¹ "RB" means the report was built with the Cold Fusion[™] Report Builder rather than with Crystal Reports[™]. New reports and improvements in existing reports will be made in Report Builder only. Report Builder works with all known standard Web browsers and operating systems.

RJM University
151 East Rosemary
Chapel Hill, NC 27514

2003-2004 Financial Aid Award Letter

Wendy Bellows 07/26/2004
 3456 Carboro Rd Student ID#: BE2253076
 Apt 17
 Chapel Hill, NC 27561 Expected Family Contribution: \$10,500.00

We are pleased to inform you that we are able to make the following awards to you for the specified semesters. If, at any time, in the future you receive aid from any other sources, the following awards will be adjusted accordingly.

Federal awards are contingent on funds the school expects to receive from the Federal Government. The college reserves the right to correct errors made in financial aid awards

	Fall	Spring	Summer	Total
<i>Natl Engineers Coop loan fund</i>	0.00	600.00	0.00	600.00
<i>Pell Award</i>	0.00	750.00	0.00	750.00

Please sign and return the enclosed acceptance form by 08/09/2004. After this date your awards are automatically cancelled.

IMPORTANT NOTICE

Financial Aid Policy

The enclosed awards must be accepted as a package with the exception of the Federal Stafford (Guaranteed Student) Loan. You may decline this loan by indicating so on the acceptance form. If you accept this loan, you must apply for it at your

• Figure 57 Award Letter Partial Example

4. You see the first of the pages as illustrated in Figure 57.

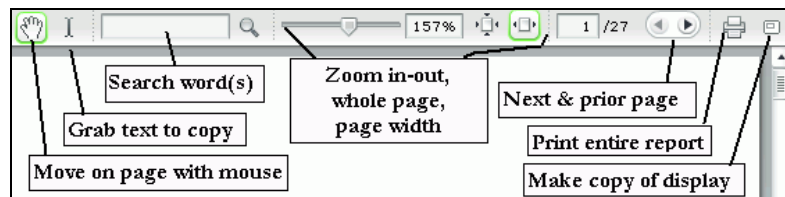
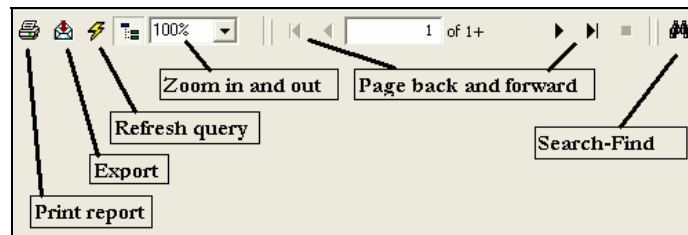


Figure 58 Report Builder (RB) Navigation



• Figure 59 Crystal Reports™ Navigation

5. Use the arrows in Figure 58 or Figure 59 to move from page to page in Figure 57 to review the letters. To print, click the printer icon.

FINDING, DOWNLOADING, AND INSTALLING EDEXPRESS

EDEXpress is software provided by the U. S. Department of Education specifically to support federal financial aid. You get both the software and the instructions from the Department of Education Web site. That site changes from year to year, so a search like that in Figure 60 is the best way to find it.



• Figure 60 Web Search for EDEXpress

The screenshot shows the 'FSA DOWNLOAD - SOFTWARE & MANUALS' page for 'EDEXpress 2006-2007'. The page has a yellow header with the FSA logo and 'U.S. DEPARTMENT OF EDUCATION'. Below the header, there is a navigation menu on the left and a main content area. The main content area includes a 'Description' section for 'AImportExportDLL7.dll Patch', a 'Software' section with a table of download links, and a 'Release 1.0' section with a table of documentation links.

Software	Date Posted	File Size	Download Time
AImportExportDLL7.dll for Win98/2000/ME/XP/Pro	01/17/2006	180 KB	32 sec. @56kbps

Document Title	Document Format	Date Posted	File Size	Download Time
Installation Guide	PDF Format	01/03/2006	70 KB	13 sec. @56kbps
Release 1.0 Cover Letter	PDF Format	01/03/2006	401 KB	1 min. @56kbps
Release 1.0 Desk Reference	PDF Format	01/03/2006	436 KB	1 min. @56kbps

• Figure 61 EDEXpress Software Download Links

The search and the result are shown in Figure 60.

Figure 61 comes from clicking the link in Figure 60. Use the links in Figure 61 to go to the download site. There you can download the software and the texts. The texts are available as Adobe® PDF or as Word files.

Install the EDEXpress software as shown in its installation manual.

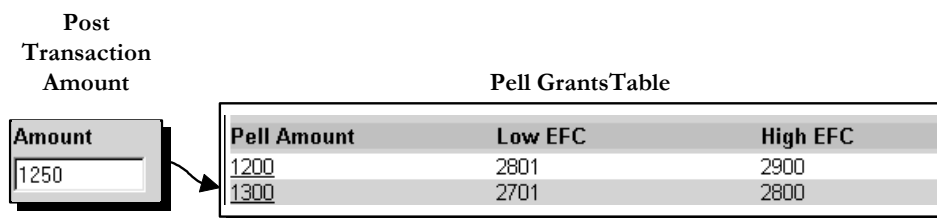
PELL GRANT PROCESSING

SONISWEB® checks funds received that are part of a Pell Grant in a special way. See the Pell documentation from the U.S. Department of Education for the processing rules in detail. In summary here is the process.

- SONISWEB® checks for existing Pell awards and payments for each student:
 - a. Awards: If there are any students being processed that have one or more Pell awards the process is stopped and a list of students with existing Pell grants is displayed.

Your user security must have the “Multi-Pell” override set in to apply more than one Pell grant per semester. See the SONISWEB® manual “User Authorization & Profiles” for more information on override setting.

- b. Payments: The second check prevents payments from being processed for awards with the "PELL" ID if any of the students have more than one Pell. As with the first check, this stops all processes and display the names of all students that have more than one Pell award.
 - c. Both checks ignore Pell awards that have been voided. See “Voiding an Award Estimate-Intention or a Payment” on page 46.
 - d. SONISWEB® matches the EFC (expected family contribution) in each student’s Financial Aid record (Figure 28, page 29) to the EFC in the Pell Grants table (Figure 65). It populates the amount field on the Post Transaction page (Figure 47) with the exact payment allowed according to the EFC in the Pell Grant table.
- SONISWEB® examines each student’s enrolled course and computes the total credit hours for the semester.



• Figure 62 Comparison of Amounts to Pell Grants Table

Figure 62 illustrates the comparison with the Pell Grants table.

Make sure there's no overlap in the credits between statuses		Table Maintenance - <i>enrlistat</i>		
ADD New Record		OR Edit Record (click on first field):		
Credit Hours (cred_hours)	Credit To (credit_to)	Disabled (disabled)	Enrol status code (enstat_cod)	Enrol status text (enstat_txt)
15.00	21.00	0	FT	FULL TIME
6.00	8.99	0	HT	HALF TIME
0.00	00.99	0	NE	Not Enrolled
1.00	5.99	0	PT	PART TIME
9.00	14.99	0	3T	THREE-QUARTER TIME

• Figure 63 Enrollment Status Table

- The computed credit hours are compared to your Enrollment Status table. Figure 63 illustrates it. This is where you define the requirements for full-time, half-time, etc. It must meet Pell Grant requirements.

Don't remove the codes **FT**, **HT**, **PT**, and **3T**. They're used in the Pell Grants table shown in Figure 64 to set the checking of awards. They are also used for Pell and Clearinghouse calculations.

- The classification from the table determines which entry in the Pell Grants table (Figure 64) is used.
- The amount in the table entry illustrated by Figure 66 is the amount that must be entered in Figure 47 (page 43).
- In addition to the proper setting of the Pell table, a matching financial transaction code must be present as described in "Checking Correct Financial Transactions for Awards" on page 61.

Pell Grants
Full Time
Three Quarter Time
Half Time
Less Than Half Time

• Figure 64 Pell Grants Table

Clicking one of the items in Figure 64 gives you Figure 65.

Pell Grants				
Pell Amount	Low EFC	High EFC	Low COE	High COE
<u>0</u>	3851	9999	4050	9999
<u>400</u>	3601	3700	4050	9999
<u>400</u>	3701	3800	4050	9999
<u>400</u>	3801	3850	4050	9999
<u>500</u>	3501	3600	4050	9999
<u>600</u>	3401	3500	4050	9999
<u>700</u>	3301	3400	4050	9999
<u>800</u>	3201	3300	4050	9999
<u>900</u>	3101	3200	4050	9999
<u>1000</u>	3001	3100	4050	9999
<u>1100</u>	2901	3000	4050	9999
<u>1200</u>	2801	2900	4050	9999
<u>1300</u>	2701	2800	4050	9999
<u>1400</u>	2601	2700	4050	9999
<u>1500</u>	2501	2600	4050	9999

• Figure 65 Pell Amounts List

Click an underlined Pell Amount in Figure 65 and you see Figure 66.

Pell Grants

Pell Amount	<input type="text" value="1,000.00"/>		
Low EFC	<input type="text" value="3,001.00"/>	High EFC	<input type="text" value="3,100.00"/>
Low COE	<input type="text" value="4,050.00"/>	High COE	<input type="text" value="9,999.00"/>

• Figure 66 Pell Amounts Entry

Fill in Figure 66 based on the instructions you get from the U S Department of Education:

Pell Amount is the award the student qualifies for.

Low EFC and **High EFC** is the range of “Expected Family Contribution” that qualifies for this Pell Amount. They’re checked against the Expected Family Contribution in the Figure 28 (page 29) for the student’s qualification.

Low COE and **High COE** is not currently used. It means “Cost of Education”.

SETTING TABLES AND WEB OPTIONS FOR FINANCIAL AID

Building the Awards Table

1. Click **Systems** in Figure 1 then Award Codes in Figure 2. That yields Figure 67.

Award Codes						
Award Code	Award Name	Amount	Loan Fee Percent	Disbursements	Allocation	Disabled
<u>ALTE</u>	ALTE Description	0	0	0	0	No
<u>CANA</u>	Canadian Grant	500000	2	2	3000	No
<u>FourS</u>	Four S Award	0	0	0	0	No
<u>FPELL</u>	My Pell	0	0	0	1000	No
<u>NCAA</u>	NCAA	9000	50	2	900000	No
<u>Pell</u>	Pell Award	100	0	0	1000	No
<u>PRES</u>	Presidential Scholarship	1000	0	1	0	No
<u>SMITH</u>	Smith Memorial Scholarship	1000	0	1	150000	No
<u>TB</u>	TB	0	0	2	0	Yes
<u>UNSL</u>	Unsub Named Student Loan	1500	4	0	57000	No

• Figure 67 Award Codes Table

The TB Award Code in Figure 67 must not be deleted.

Award Code is the abbreviated name or number given the award when it was created. This code must exactly match the code in the imported EDEXpress or Power-FAIDS® file described on page 14.

Description is just that and appears on many displays. Depending on how you set your Award Letter (page 49), it can be used there.

Amount is the standard amount for this award. It can be changed when posting.

Allocation is the total amount in the fund for the year. As award offers are made it is accounted for with each posting as illustrated in Figure 45. This is mostly for the scholarships and loans you manage.

Loan Fee Percent is specified by the agency providing the loan.

Disbursements is used in applying payments. It is the number per semester that the student will receive and it must match what you imported.

Disabled makes an award fund unavailable for selection. See the description on page 55.

2. To add a new award (or scholarship or loan), click the Add button in Figure 67.
3. To edit an existing award, click its underlined code.

Award Codes

Award Code	UNSL	Award Name	Unsub Named Student Loan
PowerFAIDS ID	<input type="text"/>	Award Type	UnSubLn ▼
Amount	1500	Loan Fee Percent	4
Disbursements	0	Allocation	57000
Allocation Memo	<input type="text" value="Special school loan fund from RJM endowment"/>		
Enroll Status	<input type="text"/>	Exclude From Billing	<input type="checkbox"/>
3rd Party Billing	<input type="checkbox"/>		
Instit. Code	<input type="text"/>		
Memo	<input type="text"/>		
Disabled	<input type="checkbox"/>		

• Figure 68 Award Code Table Entry

4. Either way you see Figure 68, empty, of course, if you clicked the Add button.
5. Enter the data in Figure 68. For a new award, you enter the “Award Code”. You cannot change that code after you have added it.

PowerFAIDS ID is where you enter the College Board’s ID if you’re using PowerFAIDS® and this award meets their criteria.

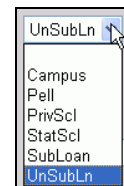
Award Type is a standard list as shown in Figure 69.

Amount and **Loan Fee Percentage** apply if this “award” defines a loan.

Exclude From Billing indicates that the award should not appear on student bills.

3rd Party Billing is the use of an award record to manage billing to, and usually payment by, a third party instead of the student. See the manual “Financial Record-keeping & Billing” for more information.

Institution Code lets you identify the institution related to this award. The pull-down⁶ list is from the list of institutions on your database.



• Figure 69 Award Type Selections

6. To disable an entry click the Disabled checkbox⁶ until a checkmark appears. To enable an entry, click the Disabled checkbox⁶ until the checkmark disappears.
7. Click the Reset button to erase what you have entered or changed and start over.
8. Click the Submit button to save your changes.
9. To delete an entry, decide whether you want a temporary or a permanent deletion. If temporary, disable it as described above. If permanent, click the Delete button. You may not be able to delete the item if it is being used in other records.
10. You get a confirming display asking whether or not you really mean it.

Establishing Standard Budgets

You can set up “typical” budgets for your students, save them, pick a budget for a student while processing his or her Financial Aid record (see page 29), and then modify the “typical” budget to suit the needs of the specific student. It’s similar to the functions in the original SONIS-Windows.

To create or change a typical budget, click **Systems** and then click Budgets. You see a list like Figure 70 of existing budgets with their names underlined and a “Create Budget” button.

Budgets		
Budget ID	Disabled	Total Budget Amt
<u>Enhanced Budget out of state</u>		\$22,750.00
<u>Medium Budget out of state</u>		\$10,850.00
<u>Small Budget</u>	Disabled	\$1,754.74
<u>In State Budget on campus</u>		\$7,402.00
<u>In State Budget off campus</u>		\$9,202.00

• Figure 70 Budget List

Clicking an existing budget shows a display like Figure 71 where you can change the fields. The create options shows Figure 71 with no “Budget ID” and zero entries.

Budgets	
Budget ID	<input type="text" value="In State Budget on campu"/>
Tuition	<input type="text" value="2,250.00"/>
Health Fee	<input type="text" value="352.00"/>
Assess Test Fee	<input type="text" value="50.00"/>
Student Services	<input type="text" value="125.00"/>
Books	<input type="text" value="250.00"/>
Transportation	<input type="text" value="500.00"/>
Room/Board	<input type="text" value="3,000.00"/>
Allowance	<input type="text" value="1,000.00"/>
Disabled	NO: <input checked="" type="radio"/> YES: <input type="radio"/>

• Figure 71 Budget Example

To disable a budget so it cannot be selected, click the Yes radio button⁶ in Figure 71.

To delete a budget that’s has never been used, click the Delete button.

To clear your entries and start over, click the Reset button.

To save the budget, click the Submit button. That returns you to Figure 70.

Setting the Lender and Guarantor Tables

Loans entered in require Lender and Guarantor table entries.

Select **Systems** (Figure 1), Table Maintenance (Figure 2), and then pick “Lender Table”. You get Figure 72.

In Figure 72 click a “Lender ID” button (such as) to change the description or the Add button to add a new lender.

An entry looks like Figure 73. For a new entry you enter the “Lender ID” that becomes the button in Figure 72. For an existing lender like Figure 73 you can change the Description but not the ID. If it’s never been used, you can delete an entry.

Select **Systems** (Figure 1), Table Maintenance (Figure 2), and then pick “Guarantor Table”. You get a display nearly identical to Figure 72 with “Guarantor ID” and Add buttons.

As with a lender entry (Figure 73), you enter the “Guarantor ID” and “Description” of a new entry, you can change the Description but not the ID of an existing entry, and you can delete an entry that’s never been used..

Table Maintenance - Lender	
<input type="button" value="ADD New Record"/> OR <input type="button" value="Edit Record (click on Button in the row):"/> Sort Order	
Lender Description	Lender ID
(Lender_txt)	(Lender_ID)
Second	<input type="button" value="2"/>
Federal Government	<input type="button" value="Fed"/>
Private Loan	<input type="button" value="Priv"/>
State Government	<input type="button" value="State"/>

• Figure 72 Lender Table

Table Maintenance - Lender/Lender_ID	
Lender Description	Lender ID
(Lender_txt)	(Lender_ID)
Private Loan	<input type="button" value="Priv"/>
<input type="button" value="Reset"/> <input type="button" value="Submit"/>	
<input type="button" value="Delete This Record"/>	

• Figure 73 Lender Entry

Picking the Web Option: EDEExpress or PowerFAIDS®

1. In Figure 2, click Web Options. That yields Figure 74.

• Figure 74 Web Options

2. Use the “Financial Aid Import Filter” pulldown⁶ in Figure 74 to choose the system you are using. EDEExpress2004-200X is the current format. EDEExpress and EDEExpress 2 are older formats no longer used.
3. Scroll to the bottom of the very long Web Options page and click the Submit button. Your option is now ready for use.

Setting up the EDEExpress Table

This table is not used for EDEExpress starting with the 2004 version.

Setting up the PowerFAIDS® Table

The PowerFAIDS® table is how you tell SONISWEB® the profile that the PowerFAIDS® staff sent you.

1. In Figure 2, click Table Maintenance.
2. You get a list of tables. Scroll down the list to PowerFAIDS Setup, click it with your mouse, then click the Submit button. You get Figure 75.

Table Maintenance - <i>finaidsem</i>							
ADD New Record		OR Edit Record (click on first field): Sort Order					
RID	POE Token	Disabled	End Date	School Year	semester	Semester Description	Start Date
(finaidsem_rid)	(POE_token)	(disabled)	(smend_dt)	(sch_yr)	(semester)	(sm_desc)	(smst_dt)
3	38	0	06/30/2004	200304	2	Spring	01/01/2004
1	39	0	12/31/2004	200304	1	Fall	08/01/2003
2	40	0	12/12/2002	200001	2	Spring	12/12/2002

• Figure 75 PowerFAIDS® Setup (Financial Aid Semesters) Table

3. To add a new record, click the Add button in Figure 75.
4. To edit an existing record, click its “button” as in 1.

Table Maintenance - <i>finaidsem/finaidsem_rid</i>							
RID	POE Token	Disabled	End Date	School Year	semester	Semester Description	Start Date
(finaidsem_rid)	(POE_token)	(disabled)	(smend_dt)	(sch_yr)	(semester)	(sm_desc)	(smst_dt)
1	39	0	12/31/2004	200304	1	Fall	08/01/2003
Reset		Submit					
Delete This Record							

• Figure 76 PowerFAIDS® Setup (Financial Aid Semesters) Entry

5. Either way you see Figure 76, empty, of course, if you clicked the Add button.
6. In Figure 76, enter the data sent to you by the PowerFAIDS® staff.

The POE entry in Figure 76 must exactly match the POE in the imported PowerFAIDS® records.

7. Click the Reset button to erase what you have entered or changed and start over.
8. Click the Submit button to save your changes.
9. To delete an entry, click the Delete button in Figure 76. You may not be able to delete the item if it is being used in other records. You get a confirming display asking whether or not you really mean it.

Setting the Pell Grants Table

See page 54.

Setting the SAP Table

1. Click **Systems** in Figure 1 then SAP GPA in Figure 2. That yields Figure 77.

SAP GPA		
GPA	From Credit	To Credit
<u>2.3</u>	3	6.99
<u>2.2</u>	7	21
<input type="button" value="Add"/>		

• Figure 77 SAP GPA List

2. You can click the Add button or pick one of the existing GPA entries by clicking its underlined “name”.

SAP GPA			
From Credit	<input type="text" value="3.00"/>	To Credit	<input type="text" value="6.99"/>
GPA	<input type="text" value="2.30"/>		
<input type="button" value="Reset"/>		<input type="button" value="Submit"/>	
<input type="button" value="Delete"/>			

• Figure 78 SAP GPA Entry

3. Figure 78 shows an entry. These settings are a combination of government loan and grant requirements and your institution’s policies.
4. Enter the appropriate values and click the Submit button. You return to Figure 77.

CHECKING CORRECT FINANCIAL TRANSACTIONS FOR AWARDS

Access to the financial transactions codes is restricted in order to maintain the integrity of the financial records. See the person responsible for maintaining the transaction codes to check on the code or codes that can be used in “Posting Award Estimates, Offers, and Intentions” on page 40 and “Posting Award Payments” on page 43.

Award Transaction

You must have one – and only one – transaction that records the award intention or offering, not a financial payment or charge.

Activity Code	Activity Type	Check Refund	Description	Disabled	Exit Path	Exit Return	Federal Report 1	Federal Report 2	Heading 1	Heading 2	Include Bill	Include Summary	IRS 1098T Refund	Post Award	Reference ID	Report Skip	Transaction Code
(act_code)	(act_type)	(chk_refund)	(descript)	(disabled)	(exit_pth)	(exit_rtn)	(fed_rpt1)	(fed_rpt2)	(heading1)	(heading2)	(inc_bill)	(inc_sum)	(refund1098T)	(post_awd)	(refer_id)	(report_skip)	(tcodes)
+	b		Activity Fee	0		0	0	0	Activity	Fee	1	1	0	0	Activity Fee	0	AF
+	b	0	Application Fee	0	0	0	0	0	App	Fee	1	1	0	0	Application Fee	0	AP
+	b		Field Fee	0		0	0	0	Field	Fee	1	1	0	0	At-Sea Training Fees	0	FF
=	a	0	Award	0		0	0	1	Award		1	1	0	1	Award	0	AW
-	b		Bail Bond	0		0	0	0	Bail	Bond	1	1	0	0	Bail Bond	0	BB
+	b		Book	0		0	0	0	Books		1	1	0	0	Books	0	BK

• Figure 79 Typical Transaction Codes - Compressed to fit on this page

Figure 79 shows a compressed version of the “tcodes” table. Only the AW transaction code can be used for posting award offers, estimates or intentions. There should be a minimum of two transaction codes to post matching award payments in order to separate loan payments from other scholarship payments on the IRS 1098-T form. It is accessed from Table Maintenance under **Systems**.

The 'Post Award' Setting in a Payment Transaction

Activity Code	Activity Type	Check Refund	Description	Disabled	Exit Path	Exit Return	Federal Report 1	Federal Report 2	Heading 1	Heading 2	Include Bill	Include Summary	IRS 1098T Refund	Post Award	Reference ID	Report Skip	Transaction Code
(act_code)	(act_type)	(chk_refund)	(descript)	(disabled)	(exit_pth)	(exit_rtn)	(fed_rpt1)	(fed_rpt2)	(heading1)	(heading2)	(inc_bill)	(inc_sum)	(refund1098T)	(post_awd)	(refer_id)	(report_skip)	(tcodes)
-	c	0	Pell Grant	0		0	0	0	Pell	Grant	1	1	0	1	Pell Grant	0	PL
-	c	0	Provider Payment	0	x	0	0	1	Provider	Payment	1	1	0	1	Provider Payment	0	PP

• Figure 80 Typical Transaction Codes - Compressed to fit on this page

Figure 80 shows a compressed version of the “tcodes” table. You need at least two (2) payments to enter award payments. Why two? Because you need to separate loan payment from scholarship payments for the IRS 1098-T reporting.

Only those codes with a 1 (digit one) in the “Post Award” column can be used for posting awards. To use SONISWEB® IRS 1098-T processing, the Federal Report fields need to be properly set:

Federal Report1:

Used for IRS 1098T processing, a 1 (the digit one) means this transaction is for valid amounts billed or valid payments received.

Federal Report2:

Used for IRS 1098T processing, a 1 (the digit one) means this transaction is for valid scholarships and grants, excluding loans.

It is accessed from [Table Maintenance](#) under **Systems**.

The Semester Description in the Semester Table

Table Maintenance - <i>semester</i>					
ADD New Record		OR Edit Record (click on Button in the row): Sort Order			
Disabled	Report Skip	Semester	Semester Description	Semester End Date	Semester Start Date
(disabled)	(report_skip)	(semester)	(sm_desc)	(smend_dt)	(smst_dt)
1	0				
0	0	1	Fall	12/31/2005	09/01/2005
0	0	2	Spring	05/30/2006	01/01/2006
0	0	3	Summer	08/28/2006	06/19/2006

• Figure 81 Semester Table

The Semester Table has its dates reset before the beginning of each semester and is widely used through SONISWEB® for much more than financial aid. Financial aid import uses it to look up the Semester Description, circled in Figure 81, to match the records from EDEXpress. They must exactly match in spelling and in case. For example, “FALL” is not the same and will not match with “Fall”.

LOCATING THE SOCIAL SECURITY NUMBER IN A STUDENT RECORD

The social security number is the U.S. federal Social Security number. It must be in the SSN field of each student’s biographic record. That is where SONISWEB® looks for a match.

Biographic			
Last	Broadhurst	First	Pamela
Nickname		Prefix	
Maiden		Gender	Female
PID	333333333	PIN	View
MI	N	Suffix	
Status	ST	SSN	333333333 View

• Figure 82 Biographic Record without SSN

Pamela Broadhurst

333333333

[Close Window](#)

• Figure 83 SSN from View in Figure 82

SSN must be exactly nine digits with no hyphens or other punctuation. A description of the biographic record is in the SONISWEB® text “Students, Faculty, Applicant and Alumni/ae Record-keeping”.

If you’re authorized to see and change this number, [View](#) appears in Figure 82. Click it and a secondary window opens, Figure 83. If that is empty SONISWEB® cannot match this person to any records in Figure 10 (page 16).

LOCATING THE IPED STATUS IN A STUDENT RECORD FOR FISAP

Further down the Biographic record shown in Figure 82 is the “IPEDS Status” shown in Figure 84. Like the Financial Aid record (page 28), it must be set correctly for “FISAP Part II Report” (page 67) and “FISAP Part VI Report” (page 68) to contain correct information.

Ethnic Code	Black
IPED Status	First-time Degree
Level	First-time Degree
Dept.	Graduate Degree
	Non-Degree Seeking
	Other Degree Seeking

• Figure 84 IPEDS Status used in FISAP Reports

Compare the two FISAP reports to the IPEDS Status in Figure 84 to see the connection.

AWARDS SUMMARY, FISAP, GPAs, AND NEED DISTRIBUTION REPORTS

These reports are useful in tracking awards and ascertaining student qualifications.

Awards Summary

1. In Figure 1 click **Reports** then click Awards Summary in the function list (Figure 2).
2. From the standard reports prompt, select the department, campus, etc. that defines those for whom you want a report. Click the Search button.
3. You get a simple display with Preview Report on it. Click that to get Figure 85.

01/31/06 3:35 PM						
Award Summary Report for 200405/1						
Award	Total Students	Amount Offered	Amount Accepted	Amount Received	Amount Allocated	Amount Remaining
NCAA	3	11,500.00	11,500.00	0.00	900,000.00	888,500.00
Pell Award	1	3,000.00	3,000.00	0.00	1,000.00	-2,000.00
Presidential Scholarship	1	3,000.00	3,000.00	0.00	0.00	-3,000.00
Smith Memorial Scholarship	4	16,300.00	16,300.00	1,000.00	150,000.00	133,700.00
Totals	9	33,800.00	33,800.00	1,000.00	1,052,000.00	1,018,200.00

• Figure 85 Awards Summary Report List

4. Figure 85 is a list of the grants, awards, and loans you defined in Figure 67 (page 54). Click an underlined Award to see the detail as illustrated in Figure 86.

Smith Memorial Scholarship for 200405/1						Return
Memo :						
For fulltime women students who are residents of Durham County, North Carolina, and who are enrolled in the Nursing program.						
Show Cumulative GPAs <input type="checkbox"/> <input type="button" value="Submit"/>						
Student	Semester	Level	Amt Offered	Amt Accepted	Amt Received	
Adams Amy A (000000000)	1	5	1,000.00	1,000.00	0.00	
Martin Ella (MA8317623)	1	3	1,000.00	1,000.00	1,000.00	
Stuart Brian (SS5217139)	1	0	9,800.00	9,800.00	0.00	
Williams Billy Dee (WI3647496)	1	1	4,500.00	4,500.00	0.00	
Total			16,300.00	16,300.00	1,000.00	

• Figure 86 Award Summary Report Detail Example

Smith Memorial Scholarship for 200405/1						Return
Memo :						
For fulltime women students who are residents of Durham County, North Carolina, and who are enrolled in the Nursing program.						
Show Cumulative GPAs <input type="checkbox"/> <input type="button" value="Submit"/>						
Student	Semester	Cum GPA	Level	Amt Offered	Amt Accepted	Amt Received
Adams Amy A (000000000)	1	3.43	5	1,000.00	1,000.00	0.00
Martin Ella (MA8317623)	1	0.00	3	1,000.00	1,000.00	1,000.00
Stuart Brian (SS5217139)	1	0.00	0	9,800.00	9,800.00	0.00
Williams Billy Dee (WI3647496)	1	4.00	1	4,500.00	4,500.00	0.00
Total				16,300.00	16,300.00	1,000.00

• Figure 87 Award Summary Report Detail with Cumulative GPAs

This detail came from clicking an Award name in Figure 85.

- Click the “Show Cumulative GPAs checkbox⁶ and then the Submit button in Figure 86 to get Figure 87 with the GPAs.



To print Figure 85, Figure 86, or Figure 87, click the printer icon on your browser.

Awards Summary by Date

- In Figure 1 click **Reports** then click Awards Summary by Date in the function list (Figure 2).
- From the standard reports prompt, select the department, campus, etc. criteria that defines those for whom you want a report. Click the Search button.
- You get a simple display with Preview Report on it. Click that to get Figure 88.

01/31/06 4:27 PM				
Award Summary Report for 12/30/1899 - 12/31/2050				
Award	Total Students	Amount Offered	Amount Accepted	Amount Received
NCAA	37	319,000.00	319,000.00	57.00
Pell Award	12	14,077.00	14,077.00	4,973.00
Presidential Scholarship	2	3,600.00	3,600.00	0.00
Smith Memorial Scholarship	7	33,100.00	33,100.00	1,000.00
Totals	59	371,302.00	371,302.00	6,030.00

• Figure 88 Award Summary by Date

- Click an underlined Award name in Figure 88 to get the details in Figure 89.

Smith Memorial Scholarship for 12/30/1899 - 12/31/2050 Return					
Memo :					
For fulltime women students who are residents of Durham County, North Carolina, and who are enrolled in the Nursing program.					
Student	Date	Level	Amt Offered	Amt Accepted	Amt Received
Adams Amy A (000000000)	05/02/2005	5	3,000.00	3,000.00	0.00
Greene Jean A (GR7702436)	01/05/2004	1	1,000.00	1,000.00	0.00
Jameson Brenda (JA5710794)	12/30/2003	0	1,000.00	1,000.00	0.00
Martin Ella (MA8317623)	01/25/2005	3	1,000.00	1,000.00	1,000.00
Stuart Brian (SS5217139)	04/25/2005	0	19,600.00	19,600.00	0.00
Summers Sally (SS1111111)	04/26/2005	4	3,000.00	3,000.00	0.00
Williams Billy Dee (WI3647496)	01/23/2006	1	4,500.00	4,500.00	0.00
Total			33,100.00	33,100.00	1,000.00

• Figure 89 Details for Award Summary by Date



To print Figure 88 or Figure 89, click the printer icon on your browser.

Financial Aid Report

1. In Figure 1 click **Financials** then click Financial Aid Report(RB) in the function list (Figure 2).
2. From the standard reports prompt, select the department, campus, etc. criteria that defines those for whom you want a report. Click the Search button.
3. You get a simple display with Preview Report on it. Click that to get Figure 90.

SonisWeb200				
Financial Aid Report				
School Year: 2005/06				
Program: Maritime Engineering				
Student:	Williams, Billy Dee	Level:	Junior	
Address:	18525 Horseshoe Circle Raleigh, NC 27510	Citizen:	YES	
		Veteran:	YES	
Phone:	919-555-1212	Social Security:	NO	
ID:	WI3647496	Pell Eligible:	YES	
SSN:		BA degree:	NO	
AGI:	15000.0000	Dependent:	1	
Budget: \$10,277.00 + Adjustments: \$0.00 + Loan Fees: \$235.00 - EFC: \$8,500.00 = NEED AMOUNT: \$2,012.00				
Financial Aid Awards				
	Fall	Spring	Summer	Total
Presidential Scholarship	\$500.00	\$0.00	\$0.00	\$500.00
				\$500.00

• Figure 90 Financial Aid Report

The report in Figure 90 is a summary of the information on budgets and awards from each student Financial Aid record (Figure 27, page 28). There's one page per student and it's in alphabetical order by the last name of the students.

FISAP Reports

SONISWEB® provides two reports to assist in filling out the FISAP¹² forms. (They can be filled out online at [www.cbfisap.ed.gov/.](http://www.cbfisap.ed.gov/))

The accuracy of these reports depends on correct data in each student's Financial Aid and Biographic records. See "Financial Aid Records, Budgets, Loans" on page 28 and "Locating the IPED Status in a Student Record for FISAP" on page 63 for those records.

FISAP Part II Report

Sometimes called the "eligibility report", it is used to help fill in a Part II, Section F of the FISAP¹² information. This gives information on the "Eligible Aid Applicants" for a selected award year. This report shows the counts for "Dependent Undergraduates", "Independent Undergraduates" and "Independent Graduates" by their "Taxable and Un-taxed Income Ranges".

1. In Figure 1 click **Reports** then click FISAP Part II in the function list (Figure 2).
2. From the standard reports prompt, select the department, campus, etc. criteria that defines those for whom you want a report. Click the Search button.

3. You get a simple display with Preview Report on it. Click that to get Figure 91

An example of a FISAP Part II report is shown in Figure 91.

The full report is longer than shown in Figure 91. The sections of the report have been overlaid so you can see them all in one figure.

Application to Participate, Part II		
<i>Section F. Information on Eligible Aid Applicants for Award Year 2005-2006</i>		
	Dependent Undergraduate Without 1st Prof. Degree	Dependent Undergraduate With Degree
Students with an "Automatic" Zero EFC	0	0
Taxable and Untaxed Income		
\$0 - \$2,999	1	0
\$3,000 - \$5,999	0	0
\$6,000 - \$8,999	0	0
\$9,000 - \$11,999	0	0

	Independent Undergraduate Without 1st Prof. Degree	Independent Undergraduate With Degree
Students with an "Automatic" Zero EFC	1	0
Taxable and Untaxed Income		
\$0 - \$999	2	0
\$1,000 - \$1,999	2	0
\$2,000 - \$2,999	0	0
\$3,000 - \$3,999	0	0

	Independent Graduate/Professional
Students with an "Automatic" Zero EFC	0
Taxable and Untaxed Income	
\$0 - \$999	0
\$1,000 - \$1,999	0
\$2,000 - \$2,999	0
\$3,000 - \$3,999	0
\$4,000 - \$4,999	0
\$5,000 - \$5,999	0

• Figure 91 FISAP Part II Report

¹² Fiscal Operations Report and Application to Participate (FISAP) used for the three Campus-Based Programs - Federal Perkins Loan, Federal Supplemental Educational Opportunity Grant (FSEOG), and Federal Work-Study (FWS).



To print Figure 91, click the printer icon on your browser.

FISAP Part VI Report

This report shows the FISAP¹² Part VI data. It shows the distribution of the expenditures, who received them, etc.

1. In Figure 1 click **Reports** then click FISAP Part VI in the function list (Figure 2).
2. From the standard reports prompt, select the department, campus, etc. criteria that defines those for whom you want a report. Click the Search button.
3. You get a simple display with Preview Report on it. Click that to get Figure 92

An example of a FISAP Part VI report is shown in Figure 92.



To print Figure 92, click the printer icon on your browser.

Name of school	SONISWeb Technological Institute		State	NC
OPEID Number	556			
Part VI: Program Summary for 200506.				
<i>Section A. Distribution of Program Recipients and Expenditures by Type of Student.</i>				
Undergraduate - Dependent				
Four S Award	AGI Range		Recipients	Funds
	\$24,000 - \$29,999		2	\$40,150.00
	\$42,000 - \$59,999		1	\$650.00
UNSL Description	AGI Range		Recipients	Funds
	\$30,000 - \$41,999		2	\$2,950.00
	\$42,000 - \$59,999		1	\$5,000.00
Undergraduate - Dependent Totals			6	\$48,750.00
Undergraduate - Independent				
Four S Award	AGI Range		Recipients	Funds
	\$ 0 - \$1,999		3	\$258.00
	\$16,000 - \$19,999		2	\$6,700.00
UNSL Description	AGI Range		Recipients	Funds
	\$20,000 and over		2	\$2,358.00
Undergraduate - Independent Totals			7	\$9,316.00
Graduate/Professional				
Four S Award	AGI Range		Recipients	Funds
	Graduate/Professional		1	\$2,300.00
Graduate/Professional Totals			1	\$2,300.00
Undergraduate and Graduate/Professional Totals				
Four S Award	AGI Range		Recipients	Funds
	Total		9	\$50,058.00
UNSL Description	AGI Range		Recipients	Funds
	Total		5	\$10,308.00
Automatic Zero EFC				
UNSL Description	AGI Range		Recipients	Funds
	Automatic Zero EFC		1	\$10,000.00
Automatic Zero EFC Totals			1	\$10,000.00

• Figure 92 FISAP Part VI Report

GPA Report

1. In Figure 1 click **Reports** then click GPA's (RB)¹¹ or GPA's in the function list (it's similar to Figure 2).
2. From the standard reports prompt, select the department, campus, etc. criteria that defines those for whom you want a report. Click the Search button.
3. You get a simple display with Preview Report on it. Click that to get Figure 93.

03/31/2004	GPA Report						Page 1 of 1
ID#	SSN#	Campus	Program Code	Level	Sem GPA	Cum GPA	
<u>2000/01 Semester 2</u>							
Adams, Morticia J.	312115555	312115555	CAMP2	ENRIC	2	0.00	0.00
Broadhurst, Pamela N.	333333333	333333333	CAMP1	MEMS3	3	2.00	2.00
Bellows, Wilma C.	BE2253076	789123456	CAMP1	MarEng	3	2.90	2.90
Adams, Oscar	111111111	111111111	CAMP2	ARTS1	1	3.00	3.00
Dempsey, Jack M.	DE9164781	506506506	CAMP1	AGR	4	4.63	4.63
Dempsey, Jack M.	DE9164781	506506506	CAMP1	SCBI1	4	4.63	4.63

• Figure 93 GPAs Report Example

4. To page through the report or print it, see the guidance on page 49.

Need Distribution Report

1. In Figure 1 click **Reports** then click Need Distribution Report (RB)¹¹ in Figure 2.
2. From the standard reports prompt, select the department, campus, and other criteria that defines those for whom you want a report. Click the Search button.
3. You get a simple display with Preview Report on it. Click that to get Figure 94.

06/20/2006	01:43:21 PM	SonisWeb200	Page 1 of 2																																																																																											
Need Distribution Report																																																																																														
School Year: 2005/06																																																																																														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;"></th> <th style="width: 10%;">Semester</th> <th style="width: 10%;">EFC</th> <th style="width: 10%;">Need Amount</th> <th style="width: 10%;">Amount Offered</th> <th style="width: 10%;">Amount Accepted</th> <th style="width: 10%;">Amount Received</th> </tr> </thead> <tbody> <tr> <td colspan="7">LEVEL: Freshman</td> </tr> <tr> <td colspan="7">NEED: \$0</td> </tr> <tr> <td colspan="7">ALTE Description</td> </tr> <tr> <td>ID: BR1586903</td> <td>Brown, Betty</td> <td>1</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$1,750.00</td> <td>\$0.00</td> </tr> <tr> <td colspan="7">Canadian Grant</td> </tr> <tr> <td>ID: BO2310863</td> <td>Bowman, Archer</td> <td>1</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$501.25</td> <td>\$0.00</td> </tr> <tr> <td colspan="7">Four S Award</td> </tr> <tr> <td>ID: BO2310863</td> <td>Bowman, Archer</td> <td>1</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$20.05</td> <td>\$20.05</td> </tr> <tr> <td>ID: WA3774976</td> <td>Walters, Barbara</td> <td>1</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$4,600.00</td> <td>\$4,600.00</td> </tr> <tr> <td colspan="7">NEED: \$5000 - \$6999</td> </tr> <tr> <td colspan="7">Four S Award</td> </tr> <tr> <td>ID: FR8975172</td> <td>Frankenheimer, Toby</td> <td>1</td> <td>\$5,000.00</td> <td>\$1,050.00</td> <td>\$1,700.00</td> <td>\$1,700.00</td> </tr> </tbody> </table>					Semester	EFC	Need Amount	Amount Offered	Amount Accepted	Amount Received	LEVEL: Freshman							NEED: \$0							ALTE Description							ID: BR1586903	Brown, Betty	1	\$0.00	\$0.00	\$1,750.00	\$0.00	Canadian Grant							ID: BO2310863	Bowman, Archer	1	\$0.00	\$0.00	\$501.25	\$0.00	Four S Award							ID: BO2310863	Bowman, Archer	1	\$0.00	\$0.00	\$20.05	\$20.05	ID: WA3774976	Walters, Barbara	1	\$0.00	\$0.00	\$4,600.00	\$4,600.00	NEED: \$5000 - \$6999							Four S Award							ID: FR8975172	Frankenheimer, Toby	1	\$5,000.00	\$1,050.00	\$1,700.00	\$1,700.00
	Semester	EFC	Need Amount	Amount Offered	Amount Accepted	Amount Received																																																																																								
LEVEL: Freshman																																																																																														
NEED: \$0																																																																																														
ALTE Description																																																																																														
ID: BR1586903	Brown, Betty	1	\$0.00	\$0.00	\$1,750.00	\$0.00																																																																																								
Canadian Grant																																																																																														
ID: BO2310863	Bowman, Archer	1	\$0.00	\$0.00	\$501.25	\$0.00																																																																																								
Four S Award																																																																																														
ID: BO2310863	Bowman, Archer	1	\$0.00	\$0.00	\$20.05	\$20.05																																																																																								
ID: WA3774976	Walters, Barbara	1	\$0.00	\$0.00	\$4,600.00	\$4,600.00																																																																																								
NEED: \$5000 - \$6999																																																																																														
Four S Award																																																																																														
ID: FR8975172	Frankenheimer, Toby	1	\$5,000.00	\$1,050.00	\$1,700.00	\$1,700.00																																																																																								

• Figure 94 Need Distribution Report

This report shows by level, by need, by award name, and then alphabetically by student, the distribution of award funds. It summarizes the information from the student Financial Aid records like that illustrated in Figure 32.

GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS

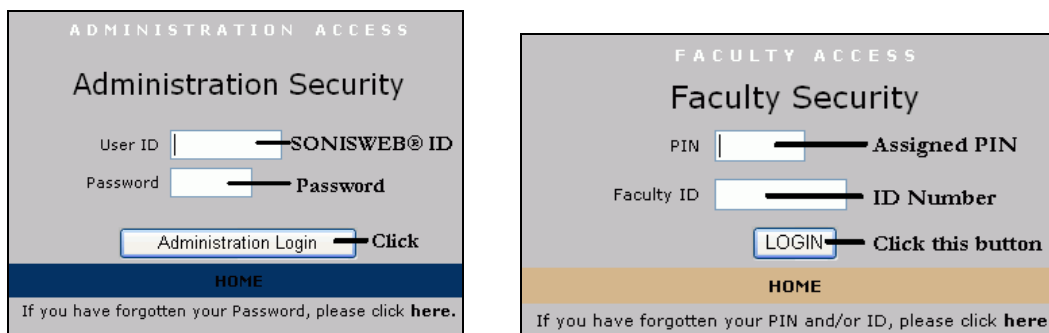
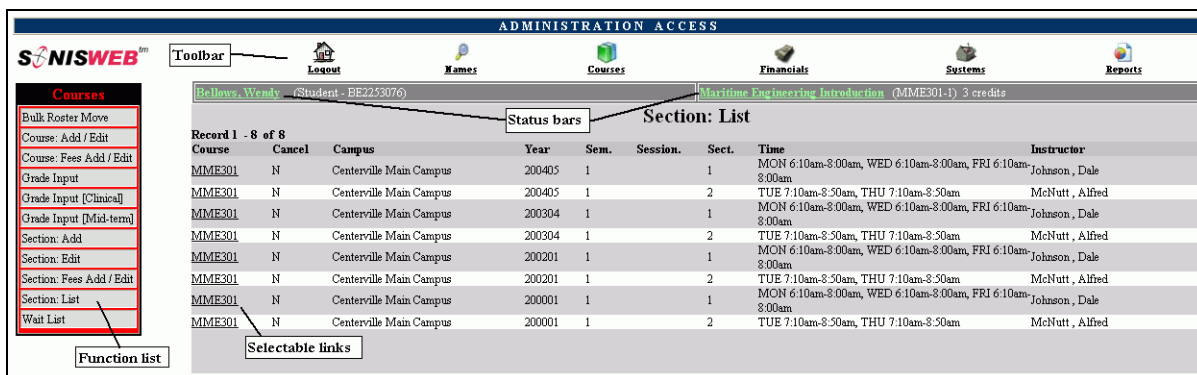


Figure 95 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 95.



• Figure 96 Typical SONISWEB® Page

Figure 96 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

When you make a selection from the **Toolbar**, the applicable **Function List** appears on the left. Only the functions authorized in your assigned profile and your individual limits and privileges appear. Some might have only **Courses** in the toolbar and only **Course: Add/Edit** for functions.

Not apparent on the display is whether or not the profile permits editing or changing the information. Once the you select a function from the list on the left, you will see a Submit or similar button at the bottom of the display if you have the permissions to add, edit, or delete the data.

By clicking a **Status Bar** you quickly return to the “person” or the “course” you were processing even if you left it temporarily to look at a financial display or a report. Of course, if you have not selected a person with **Names** or a course with **Courses**, there will be no **Status Bars** at the top.

In Figure 96 click an underlined **Selectable Link** and you go to that record.

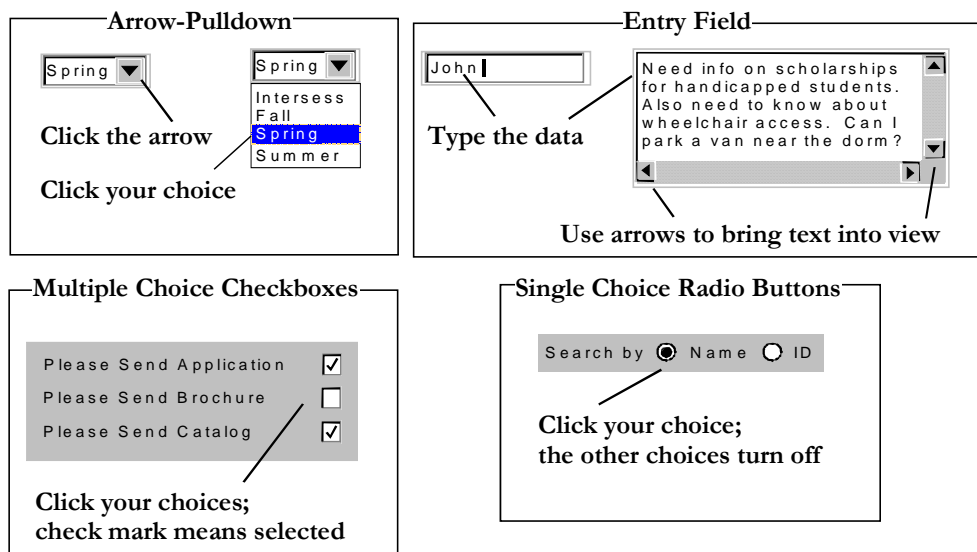


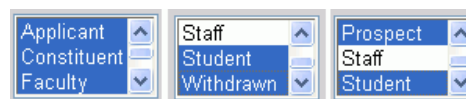
Figure 97 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 97. Use your mouse to click your selection.

- Once you have made your selection(s), you must click an action button; usually it is Submit, Delete, Reset, etc.
- For Entry Fields, click the beginning of the field so you don't get any blanks inserted in front of your entry.
- With Multiple Choice Checkboxes, each time you click a box it goes from selected (check mark) to unselected (no check mark). Click it again and it is selected, etc.
- Radio Buttons allow only one to be selected; when you click one, all the others are turned off.

Some SONISWEB® lists permit you to make multiple choices. It works just like most PC spread sheet software.

- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 98.



● Figure 98 Selecting Multiple Choices

To pick two or more that are not adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 98.