



Financial Aid System

FAM Student Data Maintenance (Student Tabs)

©SBCTC-IT

3101 Northup Way, Suite 100

Bellevue, WA 98004-1449

Phone 425.803.9700

support@sbctc.edu

Documentation Index URL

<http://www.sbctc.edu/colleges-staff/it-support/legacy-applications/fas/fas-document-index.aspx>

Printing History

October 2008

November 2, 2011

May 11, 2012

September 2016

Table of Contents

1	Overview	1
2	Accessing the Student Data Maintenance Pages	3
3	Student Tab	5
3.1	Manually Adding A New Student	6
	To manually add a new student	6
3.2	Updating Student Master Data	8
	To update student master data	8
	Type and Code Data section for Name, Email and Address	9
3.3	Deleting Student Master Data	10
	To delete a student from FAM	10
3.4	Error Messages	13
4	Award Tab	15
	To view awards for a student	16
4.1	Adding Awards (FAM502)	17
	To add an award(s) to a session under the “Awards with Financial Aid Data” section	17
	To add an award(s) to a session that does not exist under the “Awards with Financial Aid Data” section	19
4.2	Updating an Award for a Student	20
	To manually update an award for a student	20
4.3	Deleting an Award for a Student	23
	To delete an award for a student	23
4.4	Copy Award Data	24
	To manually copy award data from one session to another	24
4.5	Award Data Error Messages	25
5	Financial Aid Tab	27
	To view financial aid data for a student	28
5.1	Adding Financial Data	29
	To manually add financial aid data for a student	29
5.2	Updating Financial Data	30
	To manually update financial aid data for a student	30
5.3	Deleting Financial Data	31
	To delete financial aid data for a student	31
6	Academic Tab	33
	To view academic data for a student	33
6.1	Adding Student Academic Data	34
	To manually add student academic data to a student record	34
6.2	Updating Student Academic Data	35
	To manually update student academic data for a student	35
6.3	Deleting Student Academic Data	36
	To delete academic data for a student	36

7	Tracking Tab	37
	To view tracking data for a student	38
7.1	Adding Tracking Data	39
	To manually add tracking data for a student who <i>does not</i> already have tracking data for a session	39
7.2	Updating Tracking Data	40
	To manually update tracking data for a student who already has tracking data for a session	40
7.3	Deleting Tracking Data	41
	To delete tracking data from a student record	41
7.4	Attaching an Electronic Document	42
	To attach an electronic document to the Tracking Data Maintenance page	42
8	Comment Tab	45
	To view comment data for a student	46
8.1	Adding Comment Data	47
	To add comment data to a student record	47
8.2	Updating Comment Data	48
	To update comment data for a student	48
8.3	Deleting Comment Data	49
	To delete comment data for a student	49
9	Activity Tab	51
	To view activity data for a student	51
9.1	Adding Activity Data	52
	To add activity data to a student record	52
9.2	Updating Activity Data	53
	To update activity data for a student	53
9.3	Deleting Activity Data	54
	To delete activity data for a student	54
10	Loan History Tab	55
	To view loan history data for a student	55
10.1	Adding Loan History Data	56
	To manually add loan history data to a student record	56
10.2	Updating Loan History Data	57
	To update loan history data (summary data) for a student	57
	To update loan history data (detail data) for a student	58
10.3	Deleting Loan History Data	59
	To delete loan history data (summary data) for a student	59
	To delete loan history data (detail data) for a student	60

1 Overview

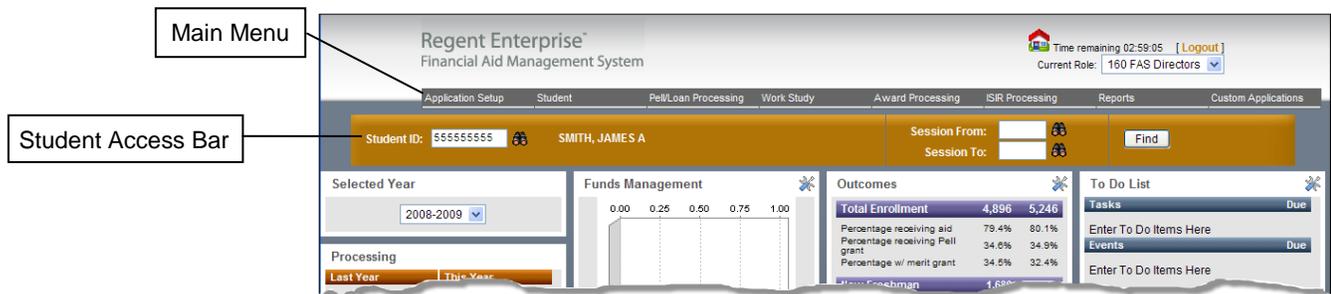
The Student Data Maintenance pages are used to maintain student information. This guide describes how to add, update, and delete student data. It also provides a reference for error messages.

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

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

- Student demographic
- Award
- Financial Aid (ISIR data)
- Academic
- Tracking
- Alternate address
- Comment
- Activity code
- PLUS Borrowers
- Loan history
- Clock hours
- ISIR

Note: To access the student data maintenance pages, use the Student Access Bar, located below the main menu at the top of each page, as described in the following chapter.



This page inserted for back-to-back printing.

2 Accessing the Student Data Maintenance Pages

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

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

By clicking the Lookup icon  located to the right of the Student ID field, you can use the FAM Name Lookup window to search for a student by Last Name, First Name, by SSN, and/or by Alternate ID. When you click the Search button on the FAM Name Lookup window, students who match the criteria* are listed in the window. You can then click the corresponding student ID number in the Student ID column to insert the ID into the Student ID field in the Student Access Bar. To view the student's records, you must then either press the Enter key or click the Find button.

Student ID	Name Type	Name Type/Code	Name	SSN	Soundex	DOB	Address	City
55555555	MSTR	DFLT	SMITH, JAMES A	55555555	11/11/1969	9909 S 99TH AVE	YAKIMA	

* Criteria entered can be a minimal amount of characters, such as a partial name or SSN.

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

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

The screenshot displays the 'Regent Enterprise Financial Aid Management System' interface. At the top, there is a navigation bar with tabs for 'Application Setup', 'Student', 'PelL/Loan Processing', 'Work Study', 'Award Processing', 'ISIR Processing', 'Reports', and 'Custom Applications'. The 'Student' tab is currently selected. Below the navigation bar, the user's session information is shown: 'Time remaining 02:58:23 [Logout]' and 'Current Role: 280 FAS Directors'. The main header area contains the 'Student ID: 999999999' and the student's name 'Allen, Kathy - 999999999'. There are also fields for 'Session From:' and 'Session To:' with a 'Find' button. Below this is a row of tabs: 'Student', 'Award', 'Financial Aid', 'Academic', 'Tracking', 'Comment', 'Activity', 'Plus Borrowers', 'Loan History', 'Clock Hours', and 'ISIR'. The 'Student' tab is active, and the page title is 'Student Data'. The form contains several sections: 'Student ID and Name' with fields for Student ID, Alternate ID, DOB, Last Name, First Name, Middle Name, Informal Name, Title, Prefix, and Suffix; 'Address, Email and Telephone' with fields for Address 1-4, City, State, Zip, Country, Email Address, Phone 1-2, and Fax; and 'Financial Aid Data' with fields for Grad. Date, Sess Rem, Student Status, Eligible Code, Hrs/Units, State, Residence, Institution Code, Session Applied, Eligible Session, Session Start, Session End, Curric Code, Code 1, and Code 2. A box labeled 'Tabs' with an arrow points to the navigation tabs at the top of the form.

3 Student Tab

Student Data (FAM501)

Navigation: Student Access Bar → Student Tab

The screenshot shows the 'Student Data' form for student SMITH JR, MARK. The form is organized into several sections:

- Student ID and Name:** Student ID: 999999999, Alternate ID: 999999999, DOB: 01/22/1959. Last Name: SMITH JR, First Name: MARK, Middle Name: [blank].
- Address, Email and Telephone:** Address: 1234 PINE AVE NE, Address 2: [blank], Address 3: [blank], Address 4: [blank]. City: BELLEVUE, State: WA, Zip: 98004. Country: [blank]. Email Address: msemall@sbctc.edu. Phone 1: 425-803-5555, Phone 2: [blank], Fax: [blank].
- Financial Aid Data:** Grad. Date: 02/10/2012, Student Status: IN, State Residence: WA, Institution Code: 01, Session Applied: B121. Sess Rem: 0.00, Eligible Code: [blank], Eligible Session: [blank], Session Start: [blank], Session End: [blank]. Curriculum Code: [blank], Miscellaneous Code 1: [blank], Miscellaneous Code 2: [blank], Miscellaneous Code 3: [blank], Miscellaneous Code 4: [blank]. His/Units: 0, ADD Eligibility Reason: High School Program, High School Program: [blank], Lender: None.
- Personal Demographics:** Sex: M, Resident: [blank], VA Code: [blank], VA Sess: A901. SSN: 999999999, Marital: [blank], Ethnic: 0, Citizen: WA. Handicap: [blank], Deceased Date: [blank], PIN: [blank]. Demographic Status: [blank], Misc Code: [blank], Misc Num: [blank].
- Type, Code Data:** Name Type: MSTR, Name Code: DFLT, Name Status: [blank]. Email Type: MSTR, Email Code: DFLT. Address Type: MSTR, Address Code: DFLT, Address Status: [blank]. Miscellaneous Code 1: [blank], Miscellaneous Code 2: [blank], Miscellaneous Code 3: [blank].

This chapter describes the following functions within the Student tab:

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

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

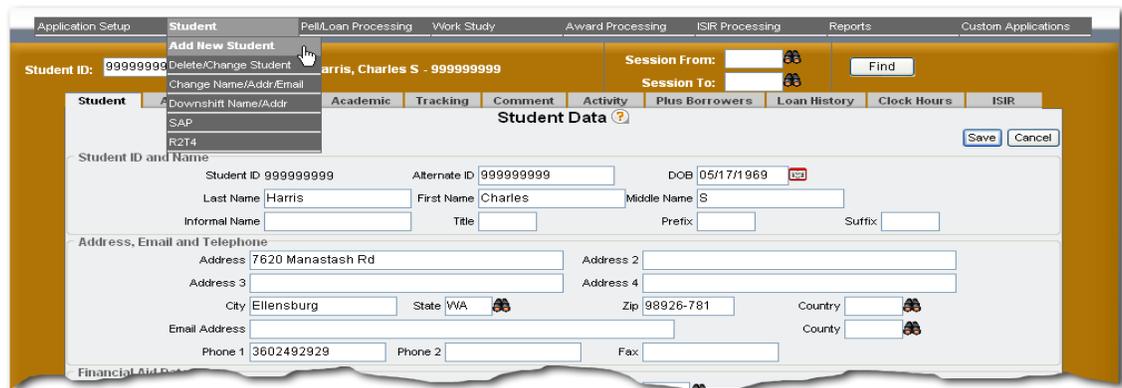
3.1 Manually Adding A New Student

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

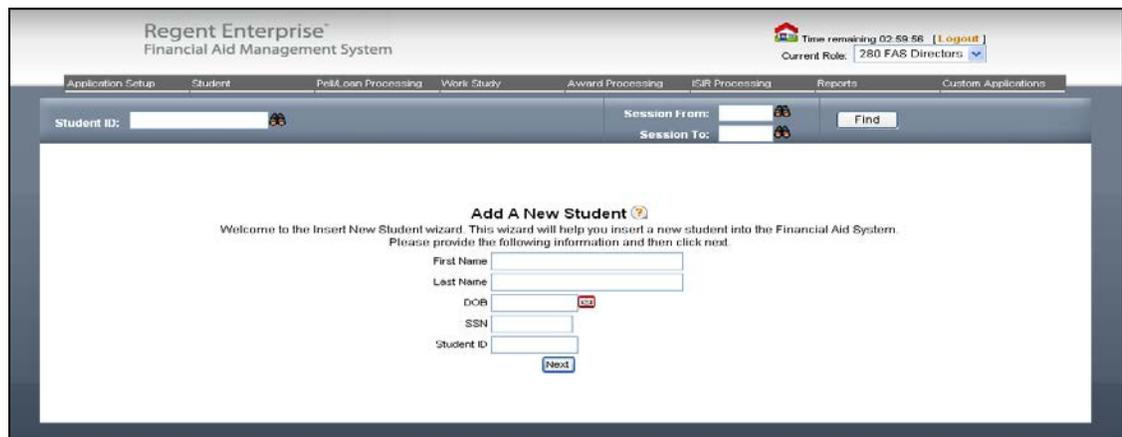
- Through the **FAFLOAD** process (NED002), where the student's FAFSA data is moved into FAM and the student's demographic data is created (see the *Loading ISIR Applicant Data into FAM* document, available on the SBCTC-IT web site).
- Through the **Add New Student** process, as described below.

To manually add a new student

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



The Add A New Student page is displayed.



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

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

Add A New Student 

Below are possible matches for the criteria you entered.

Potential FAM Students Found
Below are possible matches for the criteria you entered.
Please either select one of the listed students to edit.

Student ID	Name	DOB	SSN	Alternate ID	Edit
999999999	SMITH, ANDY	11/29/1982	999999999	999999999	

Potential SIS Students Found
Below are possible matches for the criteria you entered.
Please select one of the listed students to import.

Student ID	Name	DOB	SSN	Alternate ID	Import
999999999	SMITH, ANDY	11/29/1982	999999999	999999999	

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

Add A New Student 

Below are possible matches for the criteria you entered.

Potential FAM Students Found
Below are possible matches for the criteria you entered.
Please either select one of the listed students to edit.

Student ID	Name	DOB	SSN	Alternate ID	Edit
<i>Empty</i>					

Potential SIS Students Found
Below are possible matches for the criteria you entered.
Please select one of the listed students to import.

Student ID	Name	DOB	SSN	Alternate ID	Import
999999999			999999999		

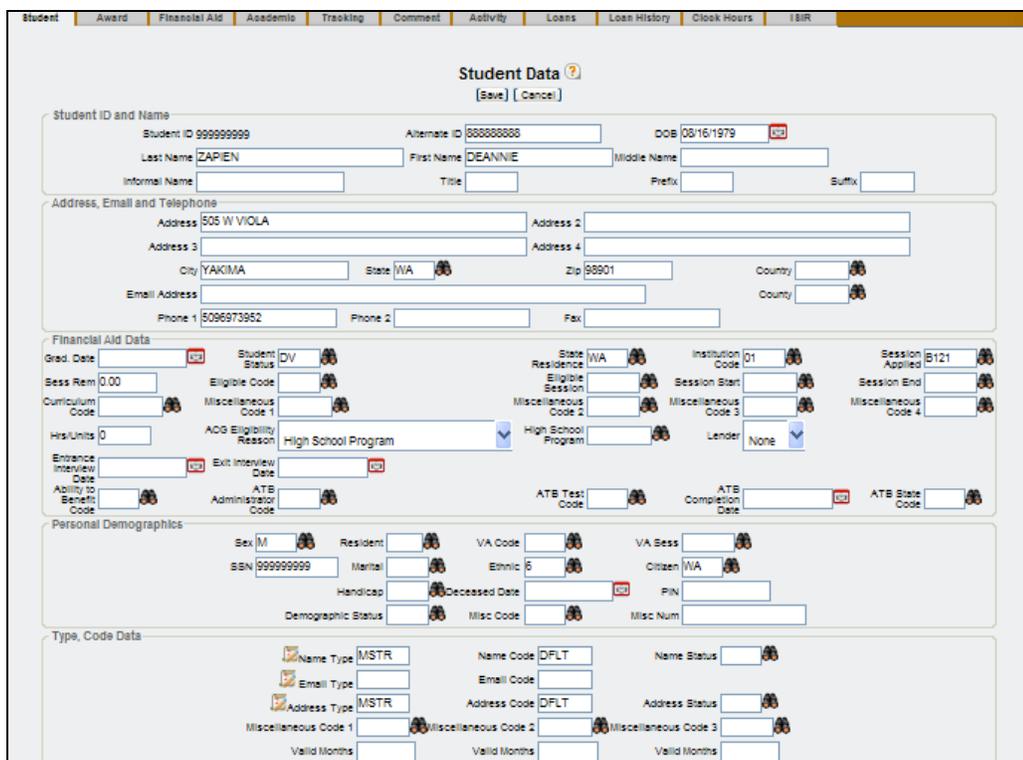
5. Click the appropriate icon to select an existing student in FAM or SIS or student who does not exist in either system.
- Click the Edit icon  to make changes to a student's record that already exists in FAM.
 - Click the Import icon  to import a student's information from SMS into FAM or allow entry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

3.2 Updating Student Master Data

To update student master data

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

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



The screenshot displays the 'Student Data' form with the following sections and fields:

- Student ID and Name:** Student ID (999999999), Alternate ID (888888888), DOB (08/16/1979), Last Name (ZAPIEN), First Name (DEANNIE), Middle Name, Informal Name, Title, Prefix, Suffix.
- Address, Email and Telephone:** Address (505 W VIOLA), Address 2, Address 3, Address 4, City (YAKIMA), State (WA), Zip (99901), Country, Email Address, Phone 1 (5096973852), Phone 2, Fax.
- Financial Aid Data:** Grad. Date, Student Status (DV), Eligible Code, Curriculum Code, His/Units (0), Entrance Interview Date, Ability to Benefit Code, Exit Interview Date, ATB Administrator Code, ATB Test Code, ATB Completion Date, ATB State Code, State (WA), Residence, Institution Code (01), Session Applied (B121), Eligible Session, Session Start, Session End, Miscellaneous Code 1-4, AOG Eligibility Reason (High School Program), High School Program, Lender (None).
- Personal Demographics:** Sex (M), Resident, VA Code, VA Sess, SSN (999999999), Marital, Ethnic (6), Citizen (WA), Handicap, Deceased Date, PIN, Demographic Status, Misc Code, Misc Num.
- Type, Code Data:** Name Type (MSTR), Name Code (DFLT), Name Status, Email Type, Email Code, Address Type (MSTR), Address Code (DFLT), Address Status, Miscellaneous Code 1-3, Valid Months.

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

Type and Code Data section for Name, Email and Address

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

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

Type, Code Data

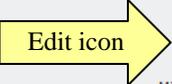
 Name Type Name Code Name Status 

 Email Type Email Code

 Address Type Address Code Address Status 

Miscellaneous Code 1  Miscellaneous Code 2  Miscellaneous Code 3 

Valid Months Valid Months Valid Months

 Edit icon

Address ?

Address Type	Address Code	Address	City	State	Zip
Enter new record.					
<input checked="" type="radio"/>	MSTR	DFLT	505 W VIOLA	YAKIMA	WA 98901

Student ID 999999999

Address Type  Address Code 

Address Address 2

Address 3 Address 4

City State  Zip Country 

County  Phone 1 Phone 2 Fax

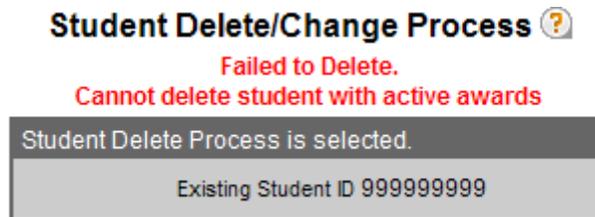
Miscellaneous Code 1  Miscellaneous Code 2  Miscellaneous Code 3  Status Code 

Valid Months Valid Months Valid Months

3.3 Deleting Student Master Data

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

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



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

Award Status = @AWD = session is closed

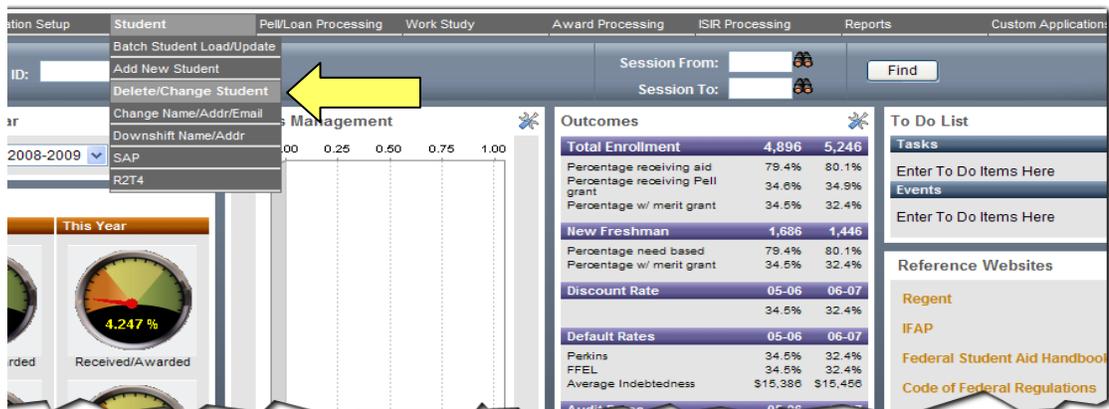
Award Status = "blank" = session is open

To delete a student from FAM

Student Delete/Change Process (Program ID: FAM003)

Navigation: Student → Delete/Change Student

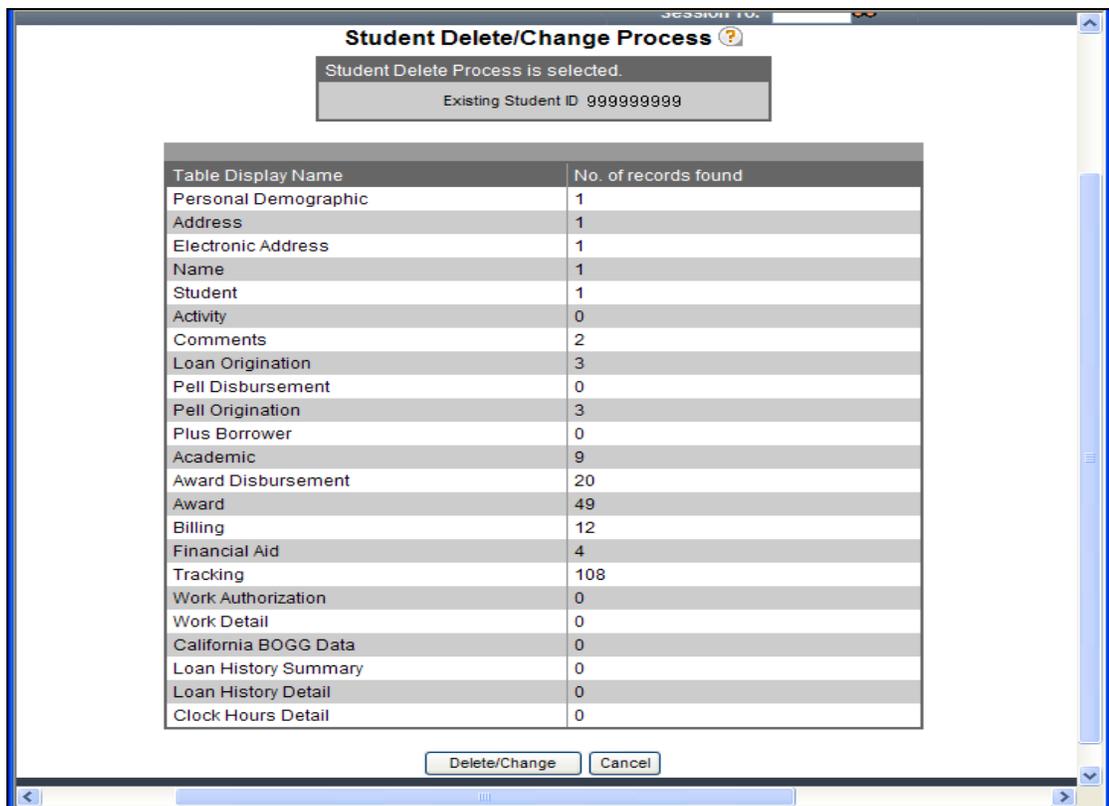
1. From the Student drop-down menu, select the Delete/Change Student option.



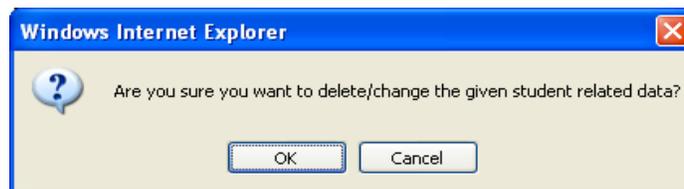
The Student Delete/Change Process page is displayed:



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



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



6. Click the OK button.

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

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

3.4 Error Messages

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

A student already exists with this ID.

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

No such record exists.

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

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

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

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

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

The start semester cannot be after the end semester.

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

This page inserted for back-to-back printing.

4 Award Tab

Student Award Data (FAM502)

Navigation: Student Access Bar → Award Tab

The screenshot displays the Regent Enterprise Financial Aid Management System interface. At the top, the system name and user information are visible. The navigation bar includes tabs for Application Setup, Student, Pell/Loan Processing, Work Study, Award Processing, ISIR Processing, Reports, and Custom Applications. The main content area shows the Award Tab for student MARTINEZ, EDUARDO E. (ID: 999999999). The interface includes search fields for Session From and Session To, and a Find button. Below the search fields, there are tabs for Student, Award, Financial Aid, Academic, Tracking, Comment, Activity, Loans, Loan History, Clock Hours, and ISIR. The main content area displays two tables: 'Awards with Financial Aid Data' and 'Awards without Financial Aid Data'.

Session Range	Session	Description	Award Count	Award Total	Edit
B121-B125	B121	SUMMER 11	4	2400.00	
	B122	FALL 2011	4	3350.00	
	B123	WINTER 2012	4	2400.00	
	Totals Only		12	8150.00	

Session	Description	Award Count	Award Total	Edit
Empty				

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

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

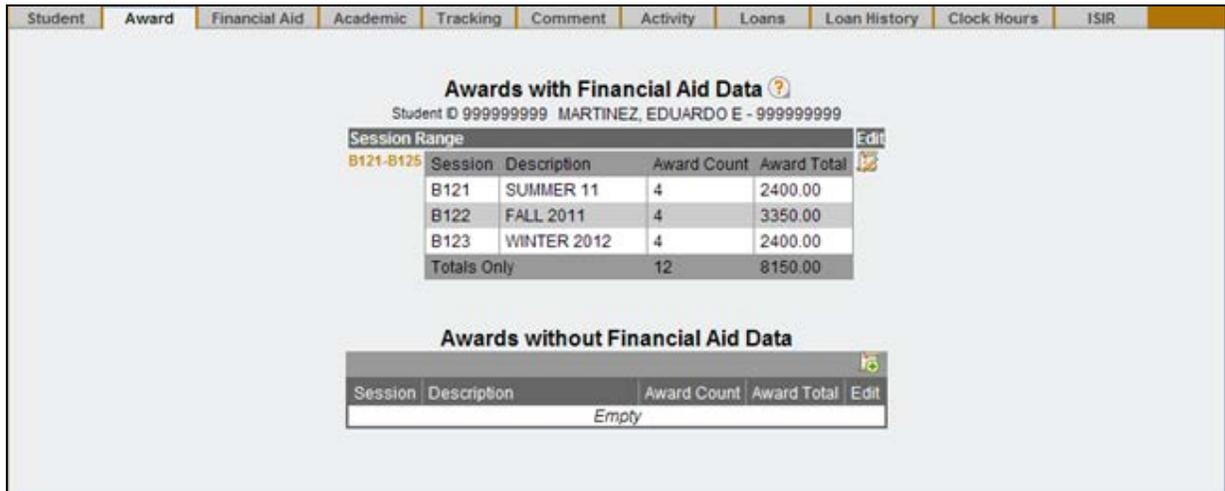
This page is used to add, update, or delete student award data. Award information is listed for each session a student has received financial aid or other financial awards. The award summary page displays two different groups of awards: Awards with Financial Aid (ISIR) Data and Awards without Financial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

To view awards for a student

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

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

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



The screenshot displays the 'Awards' tab in the Student Access Bar. The page title is 'Awards with Financial Aid Data' with a help icon. Below the title, the student information is shown: 'Student ID 999999999 MARTINEZ, EDUARDO E - 999999999'. There are two main sections:

Awards with Financial Aid Data

Session Range	Session	Description	Award Count	Award Total	Edit
B121-B125	B121	SUMMER 11	4	2400.00	
	B122	FALL 2011	4	3350.00	
	B123	WINTER 2012	4	2400.00	
	Totals Only		12	8150.00	

Awards without Financial Aid Data

Session	Description	Award Count	Award Total	Edit
Empty				

4.1 Adding Awards (FAM502)

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

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

System: SAF

Table ID: AGENCY

Value: ACTIVE-AWD-STAT

Description: \$ALL to update the Activity Date for ALL award status changes.

(Currently, the function to have the Activity Date change for only specific award statuses is not available.)

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

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

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

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

In this example, we are adding an award to the B121 – B125 session range, which has the student's ISIR data already loaded into FAM.

Session	Description	Award Count	Award Total
B121	SUMMER 11	4	2400.00
B122	FALL 2011	4	3350.00
B123	WINTER 2012	4	2400.00
Totals Only		12	8150.00

Session	Description	Award Count	Award Total	Edit
Empty				

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

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

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

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

Awards without Financial Aid Data				
Session	Description	Award Count	Award Total	Edit
B122	FALL 2011	1	500.00	

 Insert Icon

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

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

Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR												
<p>Award Data </p> <p>Student ID 999999999 MORROW, ALEXIS M - 999999999</p> <p>Session <input type="text"/></p> <table border="1" style="width: 100%;"> <thead> <tr> <th>Award Code</th> <th>Award Status</th> <th>Amount</th> <th>Award Sub Code</th> <th>Misc Code 1</th> <th>Misc Code 2</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td>1</td> <td>0.0</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <p style="text-align: center;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p>											Award Code	Award Status	Amount	Award Sub Code	Misc Code 1	Misc Code 2	<input type="text"/>	1	0.0	<input type="text"/>	<input type="text"/>	<input type="text"/>
Award Code	Award Status	Amount	Award Sub Code	Misc Code 1	Misc Code 2																	
<input type="text"/>	1	0.0	<input type="text"/>	<input type="text"/>	<input type="text"/>																	

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

4.2 Updating an Award for a Student

To manually update an award for a student

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

Awards within in a session range that contains ISIR data within FAM.

Awards within in a session for which ISIR data does not exist within FAM.

Session Range	Session	Description	Award Count	Award Total	Edit
B121-B125	B122	FALL 2011	3	2575.00	
	B123	WINTER 2012	3	2575.00	
	B124	SPRING 2012	3	2575.00	
	Totals Only		9	7725.00	

Session	Description	Award Count	Award Total	Edit
A892	FALL 08	1	500.00	

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

—or—

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

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

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

Award Data

View of the Award Data page after clicking the Edit icon under the "Awards with Financial Aid Data" section

Financial

Package Code: 01 Family Contribution: 0.00 IM Family Contribution: -1999990272.00
 Institution Code: 01 Need Amount: 9726.00 IM Need Amount: -1999990272.00
 Pell EFC: 0 Total Active Awards: 7725.00 Total Active Awards: 7725.00
 Unmet Need Amount: 2001.00 IM Unmet Need Amount: -1999997997.00

Session	Copy To	Award Code	Award Name	Award Status	Amount	Award Sub Code	Activity Date	Misc Code 1	Misc Code 2	Disbursement Amount	Funding Balance	Delete
B122	B125 B123 B124	01	PELL GT	2	1750.00		10/05/2011			0	6867966.00	
		09	STATE GT	2	775.00		10/05/2011			0	99895900.00	
		1D	SNG DCA	2	50.00		10/05/2011			0	9889.00	
B123	B125 B124	01	PELL GT	2	1750.00		10/05/2011			0	550416.00	
		09	STATE GT	2	775.00		10/05/2011			0	-20209.00	
		1D	SNG DCA	2	50.00		10/05/2011			0	9889.00	
B124	B125	01	PELL GT	2	1750.00		10/05/2011			0	558076.00	
		09	STATE GT	2	775.00		10/05/2011			0	-10351.00	
		1D	SNG DCA	2	50.00		10/05/2011			0	9889.00	

Save Accept Awards Package Cancel

Award Data

View of the Award Data page after clicking the Edit icon under the "Awards without Financial Aid Data" section

Award Code	Award Name	Award Status	Amount	Award Sub Code	Activity Date	Misc Code 1	Misc Code 2	Disbursement Amount	Funding Balance	Delete
22	TWHS	2	500.00		10/19/2011			0	999000.00	

Save Package Cancel

2. Locate the award to be updated and make the necessary changes. Enter the new data or click the Lookup icon  to select from a list of valid values. Be sure to include the decimal and cents in all award amounts.
3. When all fields are complete and you have updated all necessary information, click the Save button, or click the Cancel button if you do not want to update the award data.

Note: If the award session is closed for updating, you will not see any open fields to edit data. To reopen a session or session range, go to Application → Setup New Year → Import Session. Click the Edit icon  for the applicable session. The FAM Session Code Edit page is displayed:

FAM Session Code Edit ?

Session A892

Description

Begin Date

End Date

Start Session

Session Hours

Date AR Posted 12/02/2009

Misc Code 1

Award Status

Equivalent Session

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

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

Student ID:
ZAPIEN, DEANNIE - 999999999
Session From:

Session To:

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

Award Data ?

Student ID 999999999 Name ZAPIEN, DEANNIE SSN 999999999

Session A892

Award Code	Award Name	Award Status	Amount	Award Sub Code	Activity Date	Misc Code 1	Misc Code 2	Disbursement Amount	Funding Balance	Delete
22	TWHS	2	500.00		10/19/2011			0	999000.00	

4.3 Deleting an Award for a Student

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

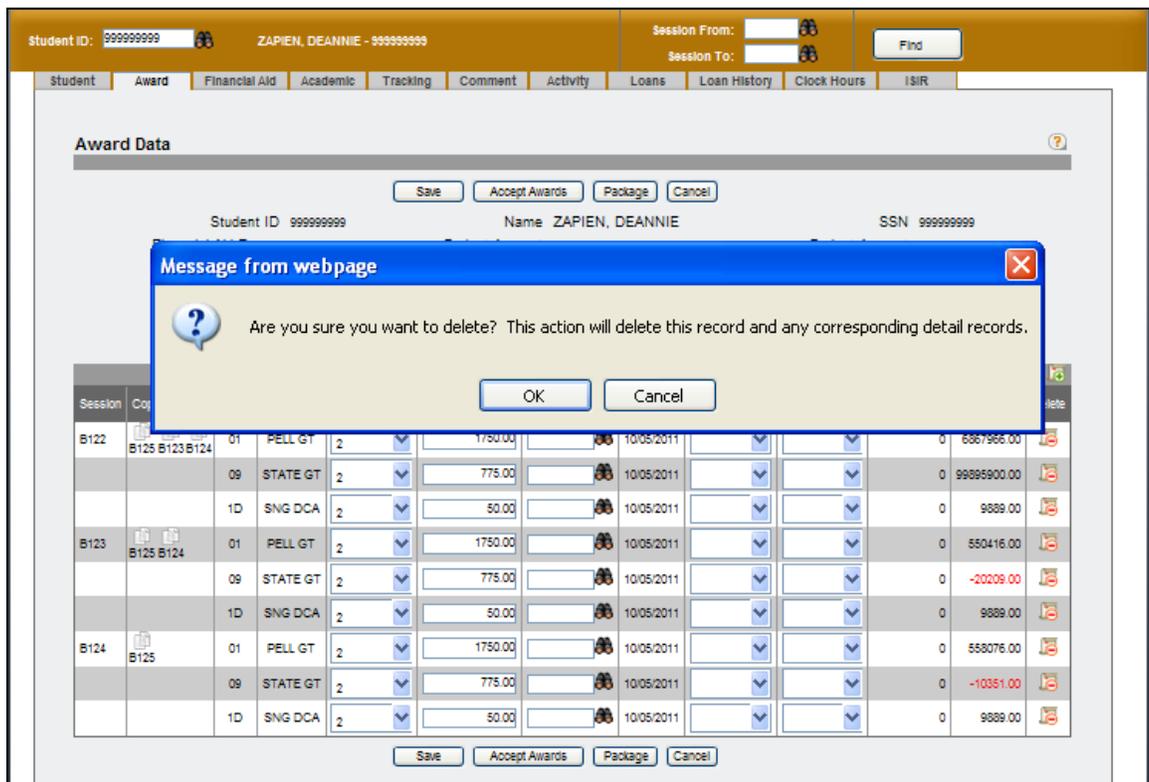
To delete an award for a student

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

The Award Data page is displayed.

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

A message is displayed asking you to confirm the deletion:



The screenshot shows the 'Award Data' page for student ZAPIEN, DEANNIE. A confirmation dialog box is displayed over the table, asking 'Are you sure you want to delete? This action will delete this record and any corresponding detail records.' The dialog has 'OK' and 'Cancel' buttons. The table below shows award records for sessions B122, B123, and B124, with columns for Session, Cof, Award Code, Amount, and Date.

Session	Cof	Award Code	Amount	Date
B122	B125 B123 B124	01 PELL GT	1750.00	10/05/2011
		09 STATE GT	775.00	10/05/2011
		1D SNG DCA	50.00	10/05/2011
B123	B125 B124	01 PELL GT	1750.00	10/05/2011
		09 STATE GT	775.00	10/05/2011
		1D SNG DCA	50.00	10/05/2011
B124	B125	01 PELL GT	1750.00	10/05/2011
		09 STATE GT	775.00	10/05/2011
		1D SNG DCA	50.00	10/05/2011

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

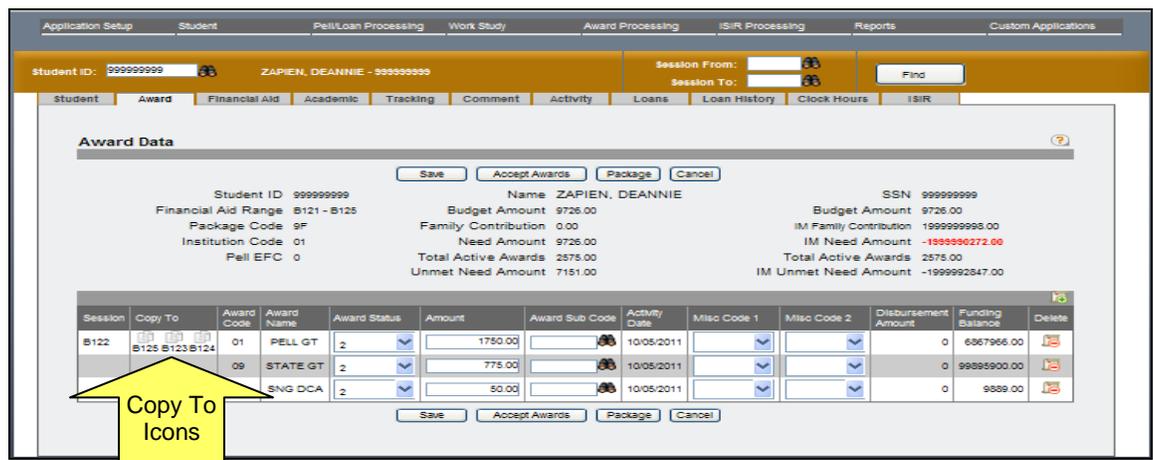
4.4 Copy Award Data

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

To manually copy award data from one session to another

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

The Award Data page is displayed:



Application Setup Student Pell/Loan Processing Work Study Award Processing ISIR Processing Reports Custom Applications

Student ID: 99999999 ZAPIEN, DEANNIE - 99999999 Session From: Session To: Find

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

Award Data

Save Accept Awards Package Cancel

Student ID 99999999 Name ZAPIEN, DEANNIE SSN 99999999
 Financial Aid Range B121 - B125 Budget Amount 9726.00 Budget Amount 9726.00
 Package Code 9F Family Contribution 0.00 IM Family Contribution 1999999995.00
 Institution Code 01 Need Amount 9726.00 IM Need Amount -1999990272.00
 Pell EFC 0 Total Active Awards 2575.00 Total Active Awards 2575.00
 Unmet Need Amount 7151.00 IM Unmet Need Amount -1999992847.00

Session	Copy To	Award Code	Award Name	Award Status	Amount	Award Sub Code	Activity Date	Misc Code 1	Misc Code 2	Disbursement Amount	Funding Balance	Delete
B122	B125 B123 B124	01	PELL GT	2	1750.00		10/05/2011			0	6867966.00	
		09	STATE GT	2	775.00		10/05/2011			0	99895900.00	
		1D	SNG DCA	2	50.00		10/05/2011			0	9889.00	

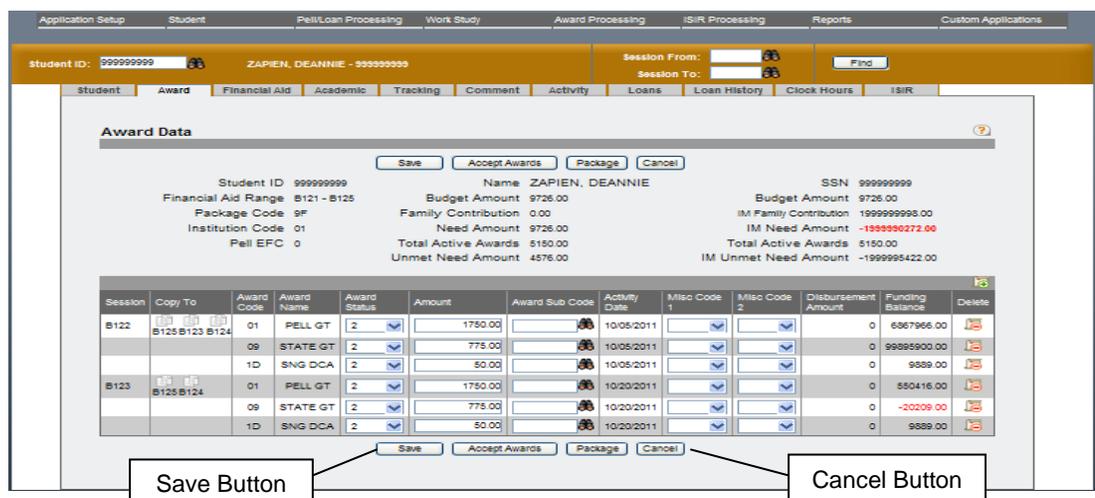
Save Accept Awards Package Cancel

Copy To Icons

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

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

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



Application Setup Student Pell/Loan Processing Work Study Award Processing ISIR Processing Reports Custom Applications

Student ID: 99999999 ZAPIEN, DEANNIE - 99999999 Session From: Session To: Find

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

Award Data

Save Accept Awards Package Cancel

Student ID 99999999 Name ZAPIEN, DEANNIE SSN 99999999
 Financial Aid Range B121 - B125 Budget Amount 9726.00 Budget Amount 9726.00
 Package Code 9F Family Contribution 0.00 IM Family Contribution 1999999995.00
 Institution Code 01 Need Amount 9726.00 IM Need Amount -1999990272.00
 Pell EFC 0 Total Active Awards 5150.00 Total Active Awards 5150.00
 Unmet Need Amount 4576.00 IM Unmet Need Amount -1999995422.00

Session	Copy To	Award Code	Award Name	Award Status	Amount	Award Sub Code	Activity Date	Misc Code 1	Misc Code 2	Disbursement Amount	Funding Balance	Delete
B122	B125 B123 B124	01	PELL GT	2	1750.00		10/05/2011			0	6867966.00	
		09	STATE GT	2	775.00		10/05/2011			0	99895900.00	
		1D	SNG DCA	2	50.00		10/05/2011			0	9889.00	
B123	B125 B124	01	PELL GT	2	1750.00		10/20/2011			0	550416.00	
		09	STATE GT	2	775.00		10/20/2011			0	-30209.00	
		1D	SNG DCA	2	50.00		10/20/2011			0	9889.00	

Save Accept Awards Package Cancel

Save Button Cancel Button

4.5 Award Data Error Messages

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

Awards exceed budget

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

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

Awards exceed need

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

No FAF on file

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

Award Code ?? : Award Budget not on File.

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

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

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

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

Student is not eligible for any awards.

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

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

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

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

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

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

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

Unmet tracking requirements for session – xxxx

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

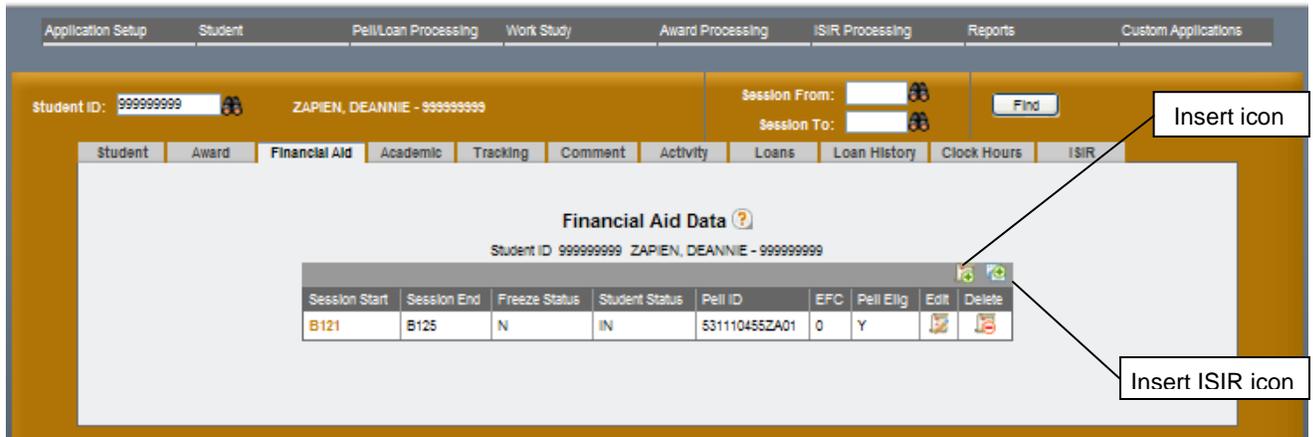
\$__ is not between the award limits of \$__ and \$__

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

5 Financial Aid Tab

Financial Aid Data (FAM503)

Navigation: Student Access Bar → Financial Aid Data Tab



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

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

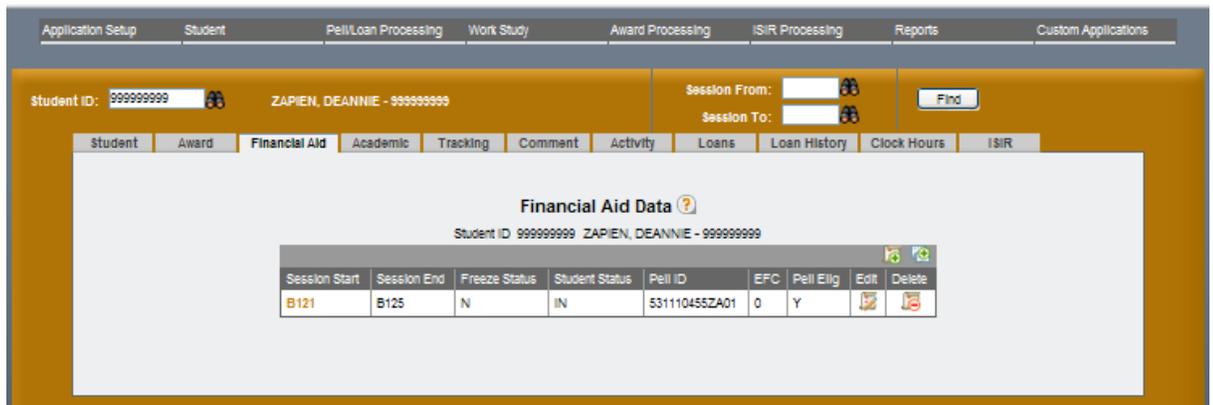
The Financial Aid Data page (FAM503) is used to add or update the information from the student's financial aid form (FAFSA), which is stored and can be viewed through the ISIR Tab. Usually, the data on this page is initiated and updated by DOE Processing need analysis process. Every time FAFLOAD (NED002)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

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

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

To view financial aid data for a student

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



Application Setup Student Pell/Loan Processing Work Study Award Processing ISIR Processing Reports Custom Applications

Student ID: 999999999  ZAPIEN, DEANNIE - 999999999 Session From:  Session To:  Find

Student Award **Financial Aid** Academic Tracking Comment Activity Loans Loan History Clock Hours ISIR

Financial Aid Data 

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

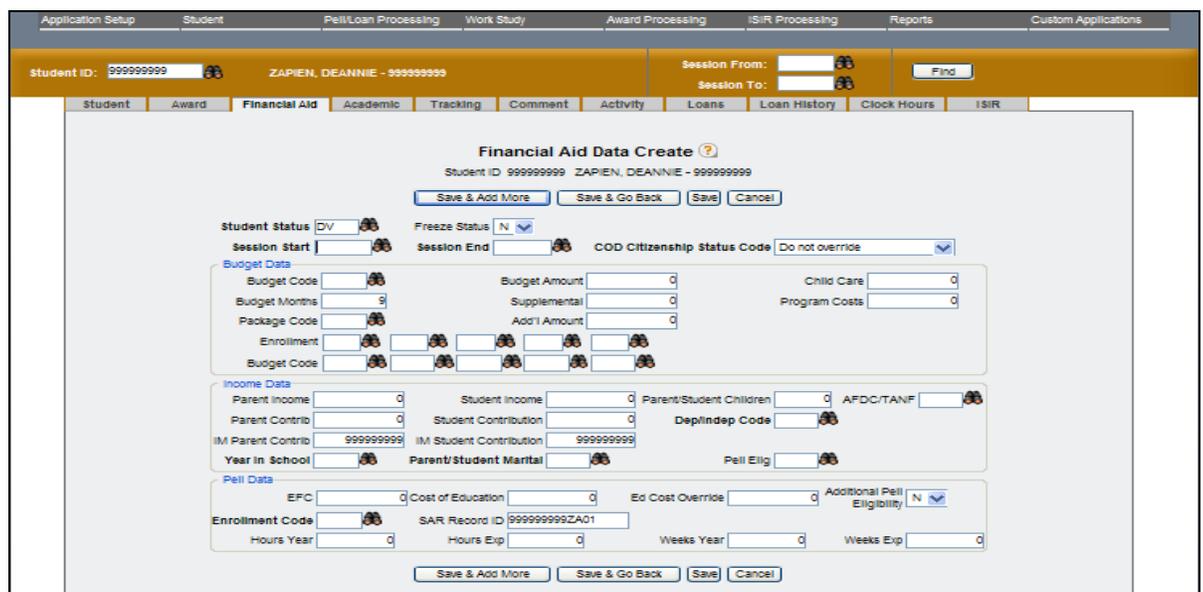
Session Start	Session End	Freeze Status	Student Status	Pell ID	EFC	Pell Elig	Edit	Delete
B121	B125	N	IN	531110455ZA01	0	Y		

5.1 Adding Financial Data

To manually add financial aid data for a student

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

The Financial Aid Data Create page is displayed:



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

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

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

5.2 Updating Financial Data

To manually update financial aid data for a student

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

The Financial Aid Data Edit page is displayed.

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

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

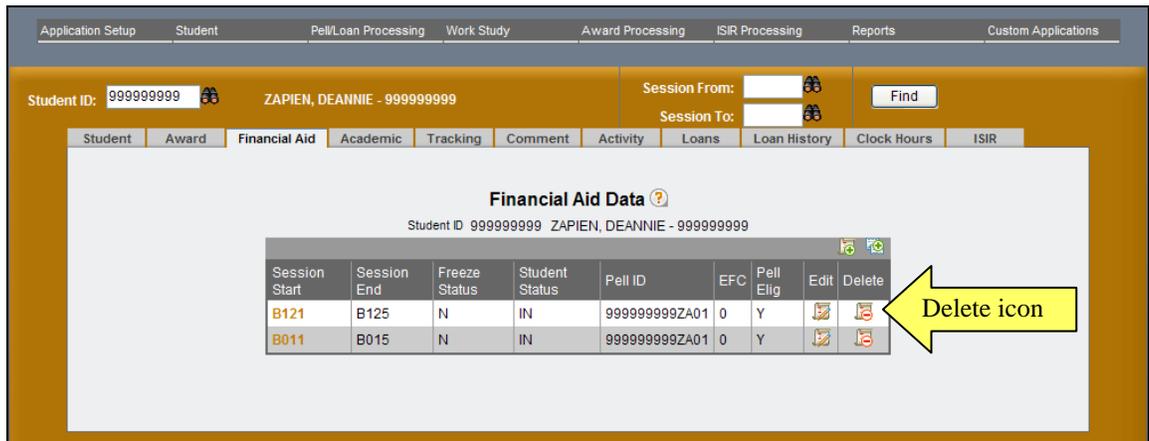
Note: The Update From ISIR button on the Financial Aid Data Edit page provides a method to load or reload data from an existing ISIR for the selected student. The ISIR data would have had to already been uploaded into FAM through the ISIR Upload process (NED006). For additional information on loading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

5.3 Deleting Financial Data

To delete financial aid data for a student

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

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



Financial Aid Data

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

Session Start	Session End	Freeze Status	Student Status	Pell ID	EFC	Pell Elig	Edit	Delete
B121	B125	N	IN	999999999ZA01	0	Y		
B011	B015	N	IN	999999999ZA01	0	Y		

Delete icon

A message is displayed asking you to confirm the deletion.



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

This page inserted for back-to-back printing.

6 Academic Tab

Academic Data (FAM504)

Navigation: Student Access Bar → Academic Tab

The screenshot shows the Academic Data (FAM504) interface. At the top, there is a navigation bar with tabs: Application Setup, Student, Pell/Loan Processing, Work Study, Award Processing, ISIR Processing, Reports, and Custom Applications. Below this, the Student ID field is populated with 999999999 and the student name is ZAPIEN, DEANNIE - 999999999. There are fields for Session From and Session To, and a Find button. Below the navigation bar, there is a tabbed interface with the Academic tab selected. The Academic Data table is displayed, showing the following data:

Session	Degree	Curriculum Code	Attempted	Earned	Funded	Override Ind	Override Hours	Hours Adjustment	Session GPA	Cum GPA	Cum Transfer Hrs	Academic Hours Posted	Edit	Delete
B122	715		15.00	15.00	15.00		0.00	0.00	0.000	0.000	0.00	10/20/2011		
A892	774		12.00	10.00	10.00		0.00	0.00	0.000	0.000	0.00	10/20/2011		

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

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

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

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

To view academic data for a student

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

The screenshot shows the Academic Data (FAM504) interface. At the top, there is a navigation bar with tabs: Student, Award, Financial Aid, Academic, Tracking, Comment, Activity, Loans, Loan History, Clock Hours, and ISIR. Below this, the Student ID field is populated with 999999999 and the student name is ZAPIEN, DEANNIE - 999999999. There are fields for Session From and Session To, and a Find button. Below the navigation bar, there is a tabbed interface with the Academic tab selected. The Academic Data table is displayed, showing the following data:

Session	Degree	Curriculum Code	Attempted	Earned	Funded	Override Ind	Override Hours	Hours Adjustment	Session GPA	Cum GPA	Cum Transfer Hrs	Academic Hours Posted	Edit	Delete
B122	715		15.00	15.00	15.00		0.00	0.00	0.000	0.000	0.00	10/20/2011		
A892	774		12.00	10.00	10.00		0.00	0.00	0.000	0.000	0.00	10/20/2011		

6.1 Adding Student Academic Data

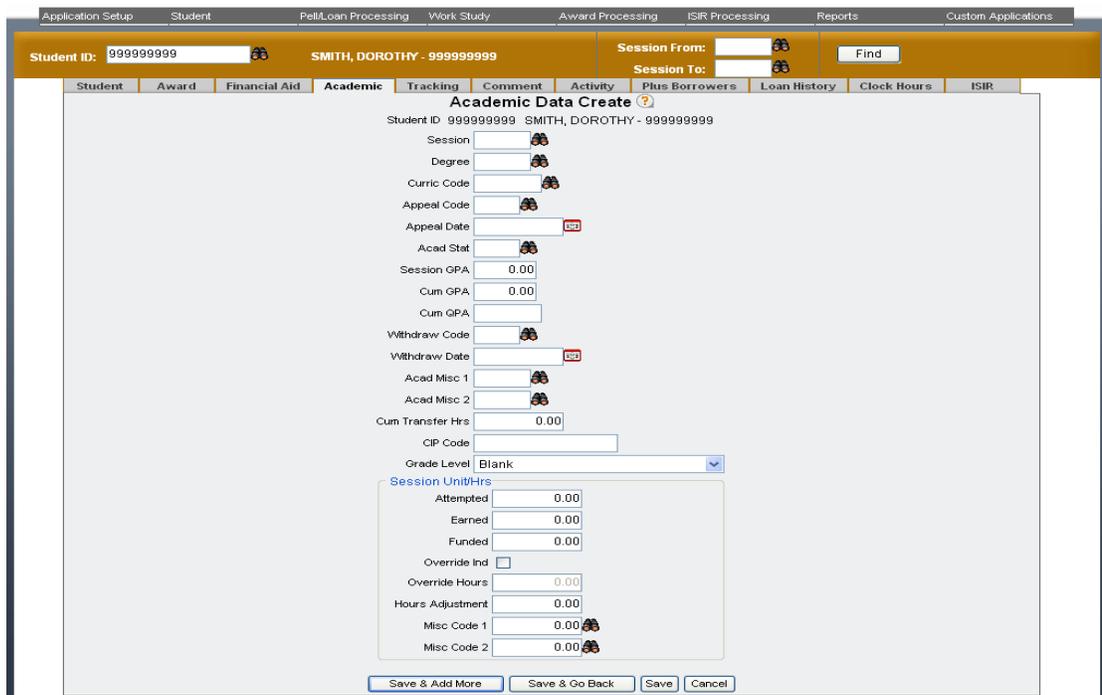
The information displayed on this page depends upon whether the student is a new or current student.

To manually add student academic data to a student record

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

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

The Academic Data Create page is displayed.



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

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

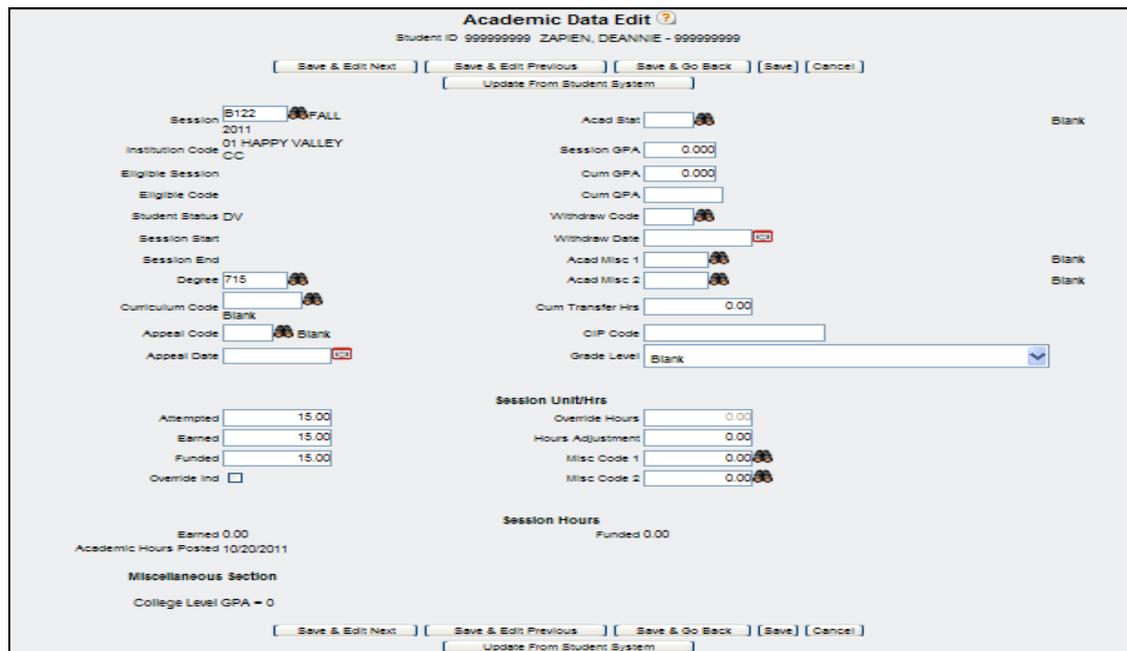
6.2 Updating Student Academic Data

To manually update student academic data for a student

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

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

The Academic Data Edit page is displayed.



Academic Data Edit 

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

Session: B122 FALL
2011
Institution Code: 01 HAPPY VALLEY CC
Eligible Session
Eligible Code
Student Status DV
Session Start
Session End
Degree: 715
Curriculum Code
Appeal Code: Blank
Appeal Date

Acad Stat: Blank
Session GPA: 0.000
Cum GPA: 0.000
Cum GPA
Withdraw Code
Withdraw Date
Acad Misc 1: Blank
Acad Misc 2: Blank
Cum Transfer Hrs: 0.00
CIP Code
Grade Level: Blank

Attempted: 15.00
Earned: 15.00
Funded: 15.00
Override Ind

Earned 0.00
Academic Hours Posted: 10/20/2011

Miscellaneous Section
College Level GPA = 0

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

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

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

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

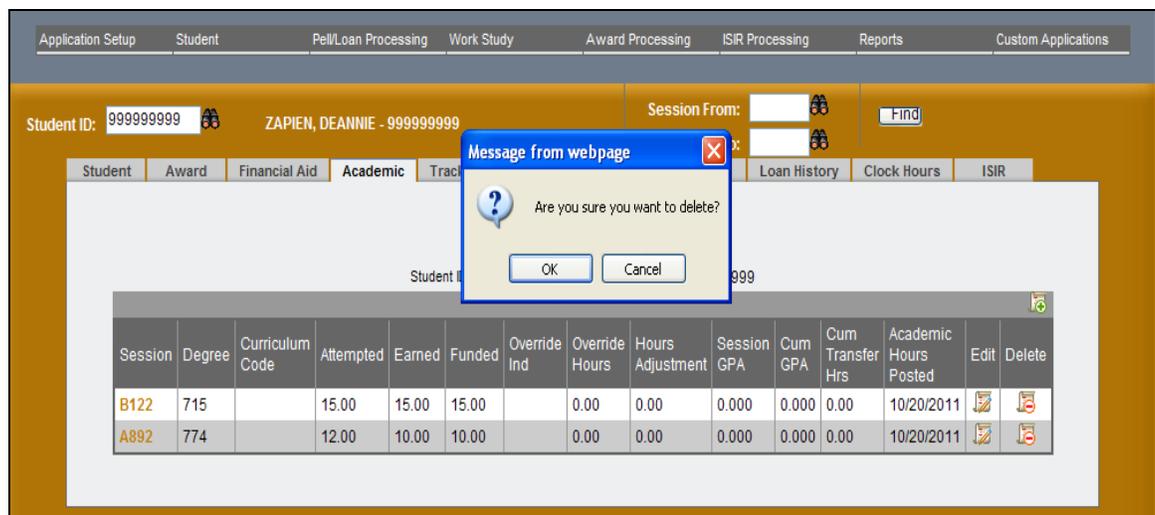
6.3 Deleting Student Academic Data

To delete academic data for a student

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

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

A message is displayed asking you to confirm the deletion.



The screenshot shows a web application interface for managing student academic data. At the top, there are navigation tabs: Application Setup, Student, Pell/Loan Processing, Work Study, Award Processing, ISIR Processing, Reports, and Custom Applications. Below the tabs, the student information is displayed: Student ID: 999999999, ZAPIEN, DEANNIE - 999999999. There are search fields for Session From and a Find button. The main content area has several tabs: Student, Award, Financial Aid, Academic, and Track. The Academic tab is selected, showing a table of academic data. A modal dialog box titled "Message from webpage" is overlaid on the table, asking "Are you sure you want to delete?" with OK and Cancel buttons. The table has columns for Session, Degree, Curriculum Code, Attempted, Earned, Funded, Override Ind, Override Hours, Hours Adjustment, Session GPA, Cum GPA, Cum Transfer Hrs, Academic Hours Posted, Edit, and Delete. Two rows of data are visible: B122 (Degree 715) and A892 (Degree 774).

Session	Degree	Curriculum Code	Attempted	Earned	Funded	Override Ind	Override Hours	Hours Adjustment	Session GPA	Cum GPA	Cum Transfer Hrs	Academic Hours Posted	Edit	Delete
B122	715		15.00	15.00	15.00		0.00	0.00	0.000	0.000	0.00	10/20/2011		
A892	774		12.00	10.00	10.00		0.00	0.00	0.000	0.000	0.00	10/20/2011		

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

7 Tracking Tab

Tracking Data (FAM505)

Navigation: Student Access Bar → Tracking Tab

Session	Description	Track Code Total	Date Notified Total	Date Received Total	Edit
B121	SUMMER 11	7	2	4	
A891	SUMMER 08	3	1	2	

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

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

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

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

To view tracking data for a student

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

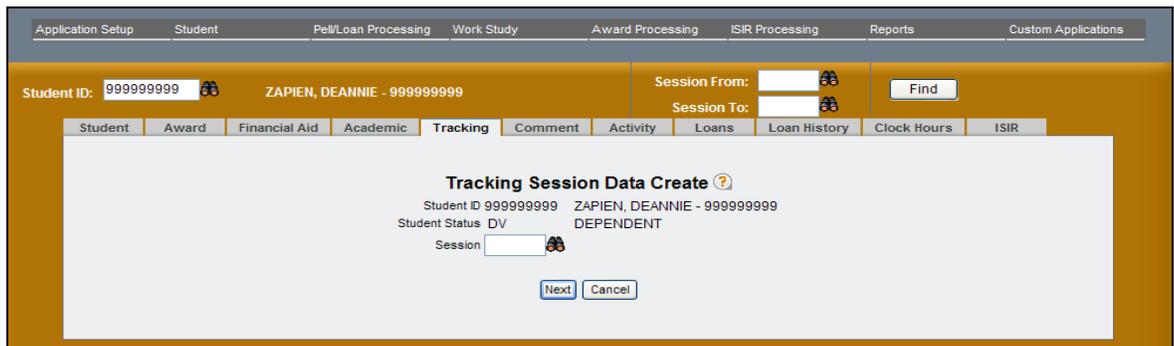
Student	Award	Financial Aid	Academic	Tracking	Comment	Activity	Loans	Loan History	Clock Hours	ISIR
Tracking Summary Data 										
Student ID 999999999 ZAPIEN, DEANNIE - 999999999										
Student Status DV DEPENDENT										
										
Session	Description	Track Code Total	Date Notified Total	Date Received Total	Edit					
B121	SUMMER 11	7	2	4						
A891	SUMMER 08	3	1	2						

7.1 Adding Tracking Data

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

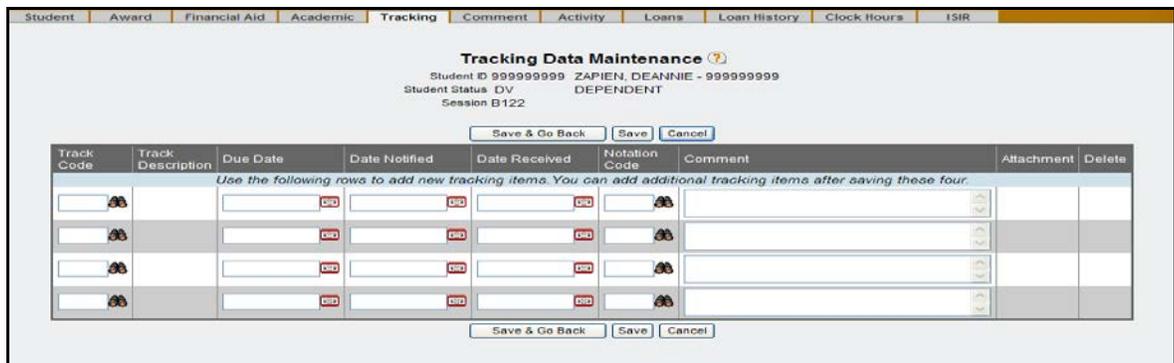
1. Begin accessing the tracking data page for the student, as described on the first page of the Tracking Tab section.
2. Click the Insert icon  located at the top, right corner of the data table in the Tracking Summary Data page.

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



3. In the Session field, type the code for the session to which the new data applies.
Note: The Tracking Summary page sorts the sessions in descending order (Z-A). Therefore, session 0000 will be listed as the last session on this page.
4. Click the Next button.

The Tracking Data Maintenance page is displayed:



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

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

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

7.2 Updating Tracking Data

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

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

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

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09	ELECTRNIC STU AID REPORT	03/25/2011		03/11/2011	NR		Attach	<input type="checkbox"/>
AD	APPLY FOR ADMISSION	03/25/2011		10/05/2011	RQ		Attach	<input type="checkbox"/>
DF	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ	132	Attach	<input type="checkbox"/>
MA	Test One for Auto Tracking	03/25/2011	10/20/2011		NR		Attach	<input type="checkbox"/>
WA	STATE NEED GRANT NOMINEE	03/11/2011			EL	2682-0500	Attach	<input type="checkbox"/>
<i>Use the following rows to add new tracking items. You can add additional tracking items after saving these four.</i>								

3. Edit the data as needed.
4. After updating the fields, click the Save button at the bottom of the page. Click the Cancel button if you do not want to save the changes. Clicking the Save & Go Back button saves your changes and redisplayes the Tracking Summary Data page.
5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

Note: A maximum of 70 characters can be entered into the Comment field box. If more than 70 characters are entered, an error message appears.

7.3 Deleting Tracking Data

To delete tracking data from a student record

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

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

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09	ELECTRNIC STU AID REPORT	03/25/2011		03/11/2011	NR		Attach	<input type="checkbox"/>
AD	APPLY FOR ADMISSION	03/25/2011		10/05/2011	RQ		Attach	<input type="checkbox"/>
DF	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ	132	Attach	<input type="checkbox"/>
MA	Test One for Auto Tracking	03/25/2011	10/20/2011		NR		Attach	<input checked="" type="checkbox"/>
WA	STATE NEED GRANT NOMINEE	03/11/2011			EL	2682-0500	Attach	<input type="checkbox"/>
<i>Use the following rows to add new tracking items. You can add additional tracking items after saving these four.</i>								

 Delete Check Box

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

7.4 Attaching an Electronic Document

To attach an electronic document to the Tracking Data Maintenance page

1. View the tracking data for the student, as described on the first page of the Tracking Tab section 38.
2. In the Edit column on the Tracking Summary Data page, click the Edit icon  corresponding to the session you want to delete.

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

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09	ELECTRIC STU AID REPORT	03/25/2011		03/11/2011	NR		Attach	<input type="checkbox"/>
AD	APPLY FOR ADMISSION	03/25/2011		10/05/2011	RQ		Attach	<input type="checkbox"/>
DF	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ	132	Attach	<input type="checkbox"/>
MA	Test One for Auto Tracking	03/25/2011	10/20/2011		NR		Attach	<input type="checkbox"/>
WA	STATE NEED GRANT NOMINEE	03/11/2011			EL	2682-0500	Attach	<input type="checkbox"/>
Use the following rows to add new tracking items. You can add additional tracking items after saving these four.								
							Attach link	

Save & Go Back Save Cancel

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

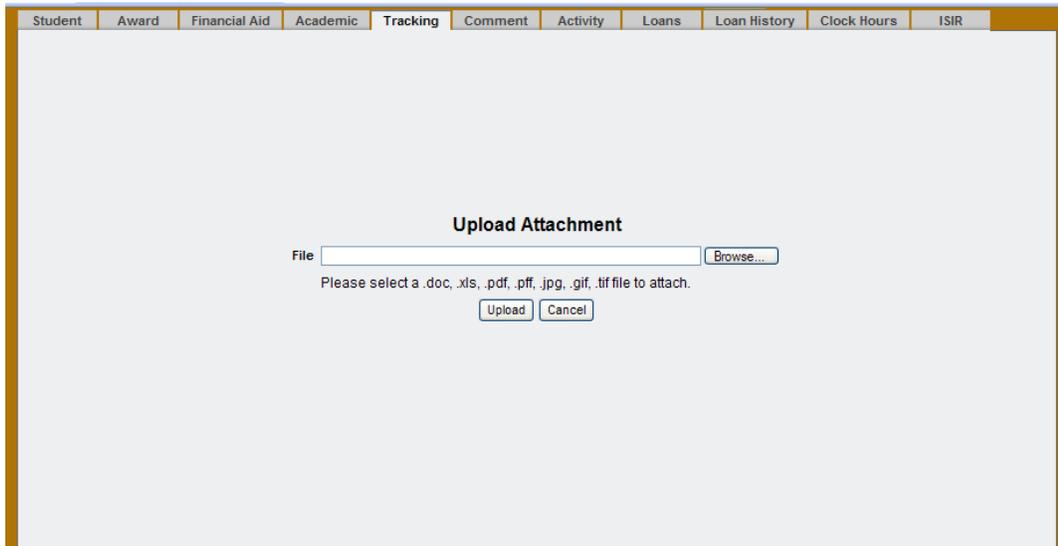
The Upload Attachment page is displayed.

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

—or—

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

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



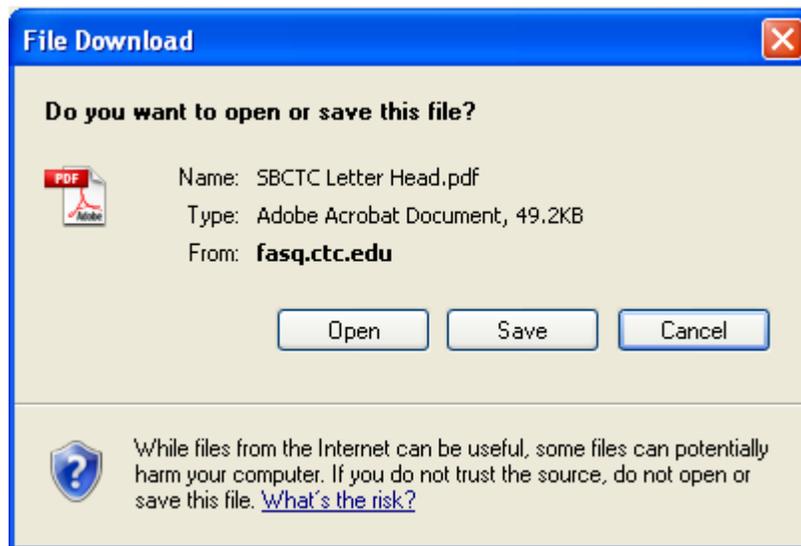
5. Click the Upload button to attach the document to the Tracking tab. The Tracking Data Maintenance page is displayed.

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

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

Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Attachment	Delete
09	ELECTRNIC STU AID REPORT	03/25/2011		03/11/2011	NR		Download Delete	<input type="checkbox"/>
AD	APPLY FOR ADMISSION	03/25/2011		10/05/2011	RQ		Attach	<input type="checkbox"/>
DF	DEFAULTED ON STUDENT LOAN	03/25/2011		10/05/2011	RQ	132	Attach	<input type="checkbox"/>
MA	Test One for Auto Tracking	03/25/2011	10/20/2011		NR		Attach	<input type="checkbox"/>
WA	STATE NEED GRANT NOMINEE	03/11/2011			EL	2682-0500	Attach	<input type="checkbox"/>
<i>Use the following rows to add new tracking items. You can add additional tracking items after saving these four.</i>								

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



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



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

8 Comment Tab

Comment Data (FAM507)

Navigation: Student Access Bar → Comment Tab

The screenshot shows the 'Comment Data Create' form within the Student Access Bar. The top navigation bar includes tabs for Student, Award, Financial Aid, Academic, Tracking, Comment, Activity, Loans, Loan History, Clock Hours, and ISIR. The 'Comment' tab is selected. The form displays the student's information: Student ID 999999999 and name ZAPIEN, DEANNIE - 999999999. It includes fields for Session, Block #, and Type, each with a calendar icon. The 'Block #' field has an 'Auto Generate' checkbox checked. A large text area is provided for entering the comment. At the bottom, there are four buttons: 'Save & Add More', 'Save & Go Back', 'Save', and 'Cancel'.

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

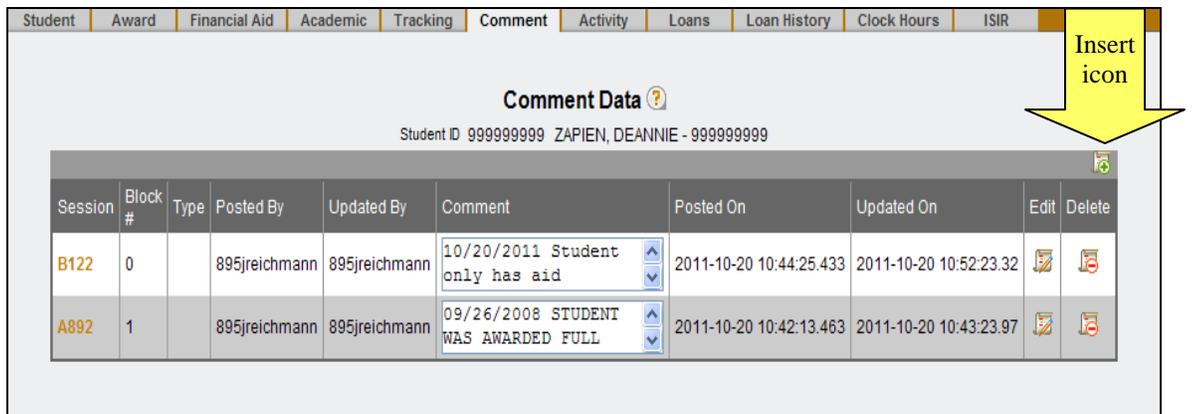
- Adding Comment Data
- Updating Comment Data
- Deleting Comment Data

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

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

To view comment data for a student

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



Comment Data 

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

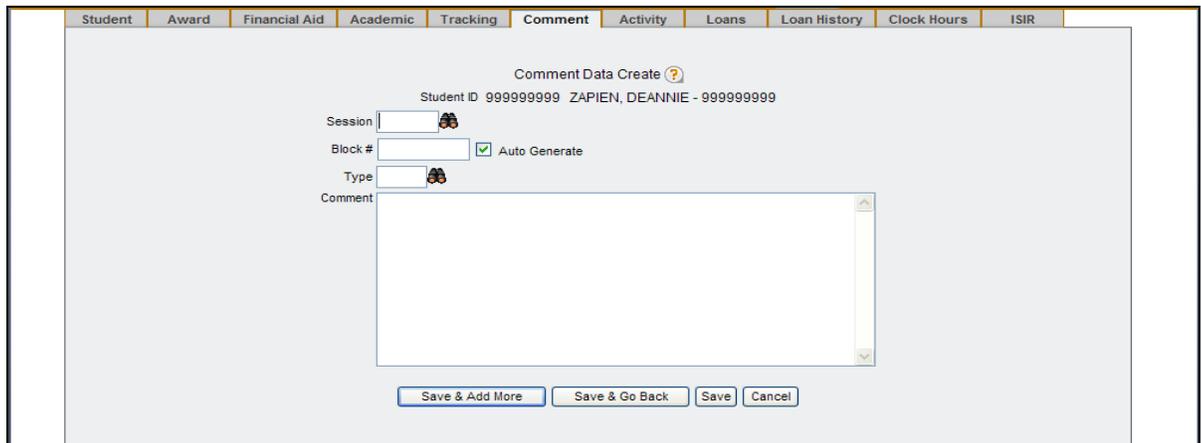
Session	Block #	Type	Posted By	Updated By	Comment	Posted On	Updated On	Edit	Delete
B122	0		895jreichmann	895jreichmann	10/20/2011 Student only has aid	2011-10-20 10:44:25.433	2011-10-20 10:52:23.32		
A892	1		895jreichmann	895jreichmann	09/26/2008 STUDENT WAS AWARDED FULL	2011-10-20 10:42:13.463	2011-10-20 10:43:23.97		

8.1 Adding Comment Data

To add comment data to a student record

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

The Comment Data Create page is displayed.



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

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

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

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

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

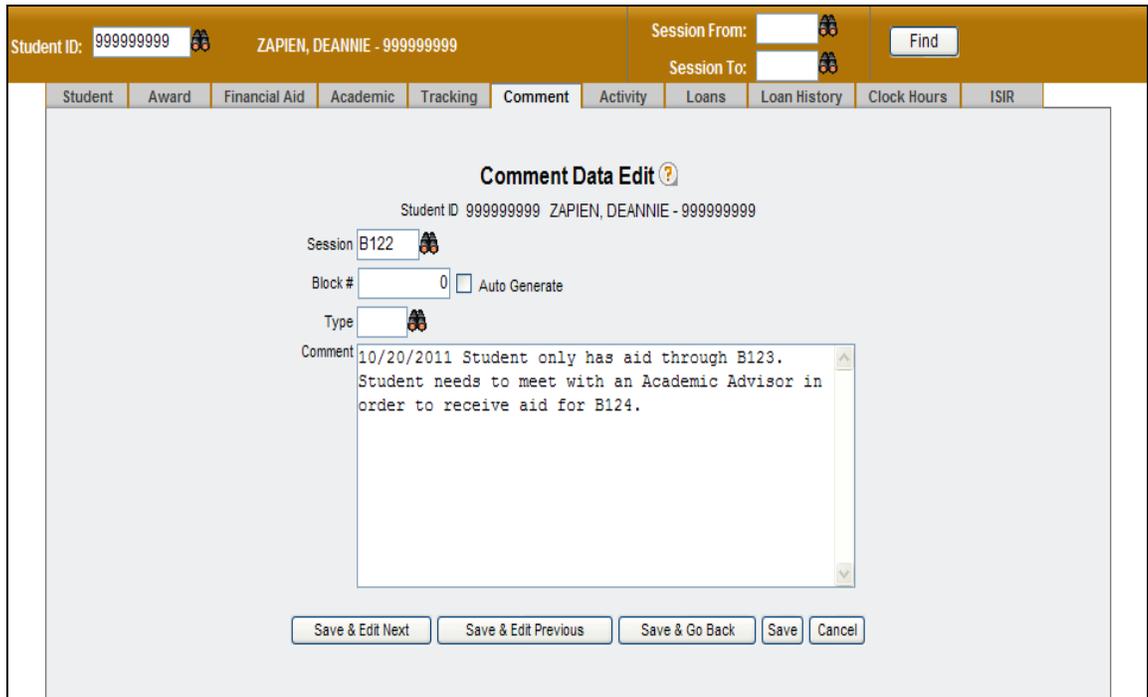
Note: A maximum of 2100 characters may be entered into the Comment field box.

8.2 Updating Comment Data

To update comment data for a student

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

The Comment Data Edit page is displayed.



Student ID: 999999999 ZAPIEN, DEANNIE - 999999999

Session From: Find

Session To:

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

Comment Data Edit

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

Session B122

Block # 0 Auto Generate

Type

Comment 10/20/2011 Student only has aid through B123.
Student needs to meet with an Academic Advisor in order to receive aid for B124.

Save & Edit Next Save & Edit Previous Save & Go Back Save Cancel

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

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

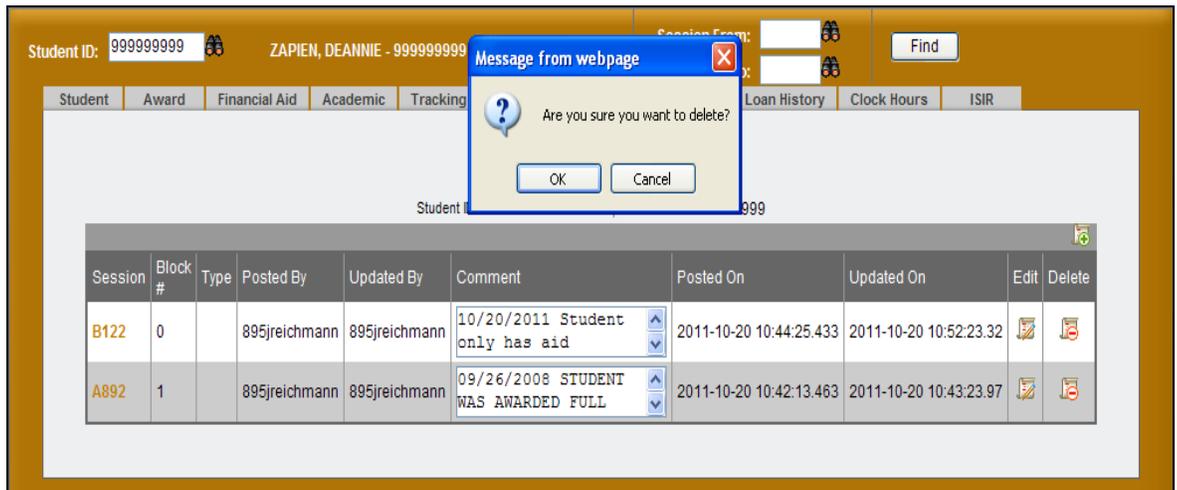
5. To exit the page, navigate to another part of FAM by clicking a different tab or making a selection from the main menu.

8.3 Deleting Comment Data

To delete comment data for a student

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

A message is displayed asking you to confirm the deletion:



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

This page inserted for back-to-back printing.

9 Activity Tab

Activity Data (FAM508)

Navigation: Student Access Bar → Activity Tab

Session	Activity Code	Description	Activity Date	Misc Code 1	Misc Code 2	Misc Code 3	Edit	Delete
A892	BUDGET	BUD CDS FOR SCHED COSTS	10/01/2008					

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

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

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

To view activity data for a student

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

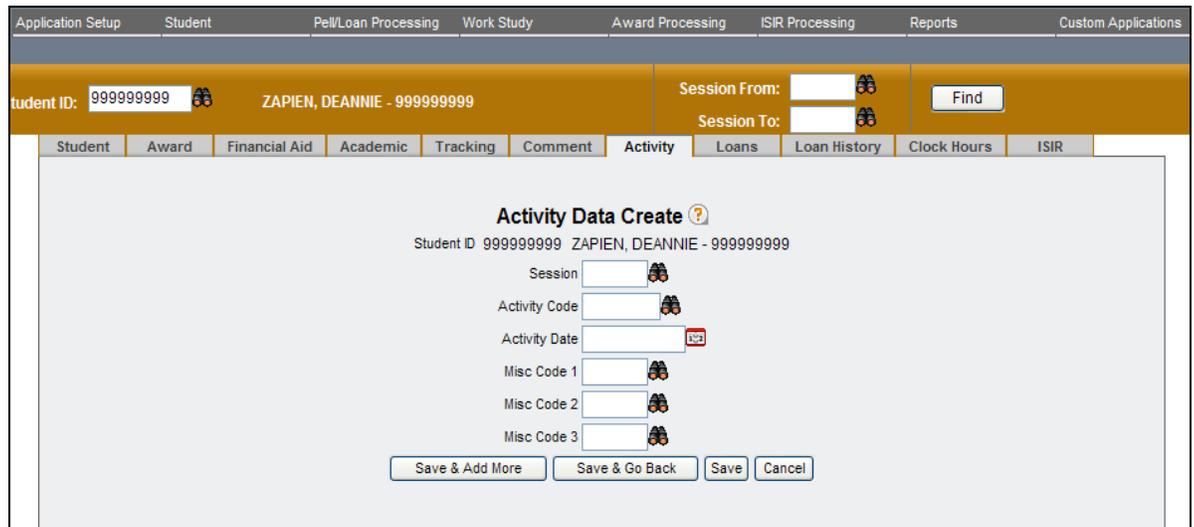
Session	Activity Code	Description	Activity Date	Misc Code 1	Misc Code 2	Misc Code 3	Edit	Delete
A892	BUDGET	BUD CDS FOR SCHED COSTS	10/01/2008					

9.1 Adding Activity Data

To add activity data to a student record

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

The Activity Data Create page is displayed:



The screenshot shows the 'Activity Data Create' page in the FAM system. The page header includes navigation tabs: Application Setup, Student, Pell/Loan Processing, Work Study, Award Processing, ISIR Processing, Reports, and Custom Applications. The student information is displayed as Student ID: 999999999 ZAPIEN, DEANNIE - 999999999. There are fields for Session From and Session To, with a Find button. The 'Activity' tab is selected in the main menu. The 'Activity Data Create' form contains the following fields: Session, Activity Code, Activity Date, Misc Code 1, Misc Code 2, and Misc Code 3. At the bottom of the form are four buttons: Save & Add More, Save & Go Back, Save, and Cancel.

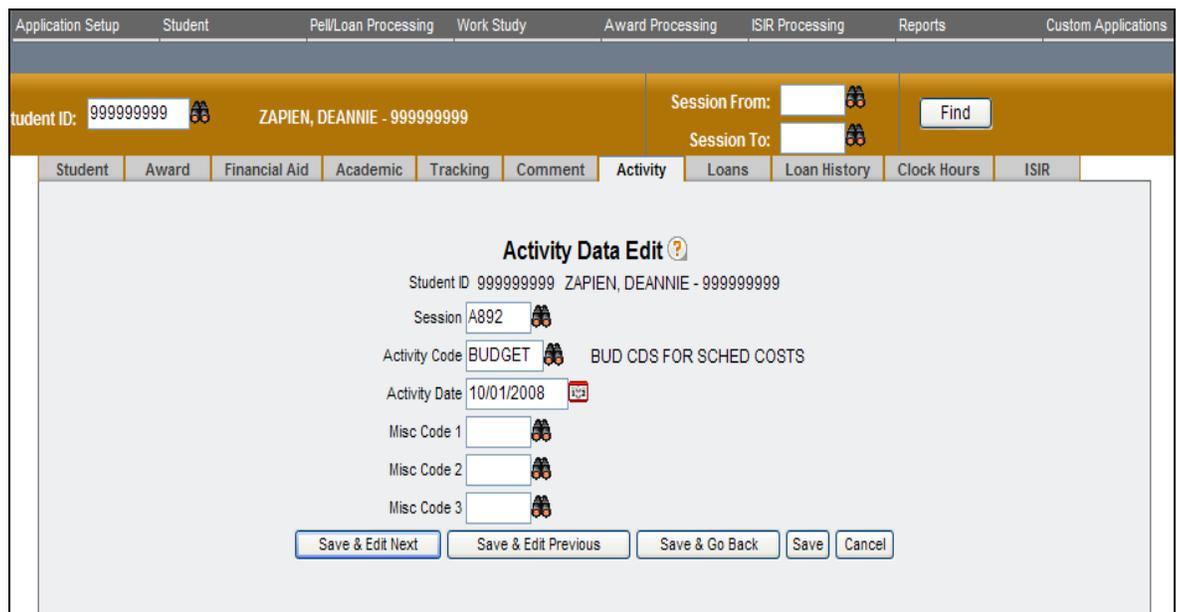
3. In the Session field, type the session code to which the activity record is to be assigned.
4. In the Activity Code field, type the activity code to which the activity record is to be assigned. You can click the Lookup icon  to display a list of valid codes for your college.
5. In the Activity Date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

9.2 Updating Activity Data

To update activity data for a student

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

The Activity Data Edit page is displayed:



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

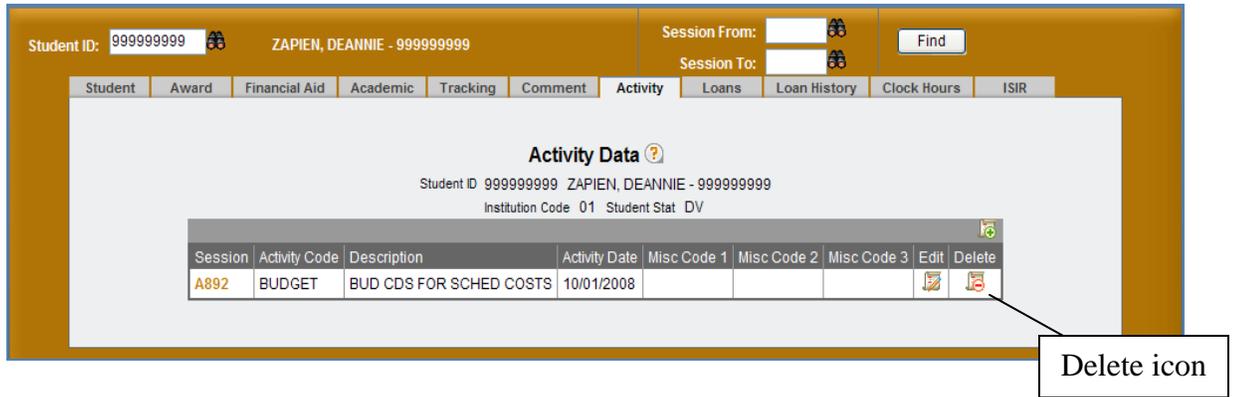
Click the Cancel button if you do not want to save the changes.

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

9.3 Deleting Activity Data

To delete activity data for a student

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



Student ID: 999999999 ZAPIEN, DEANNIE - 999999999

Session From: Session To: Find

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

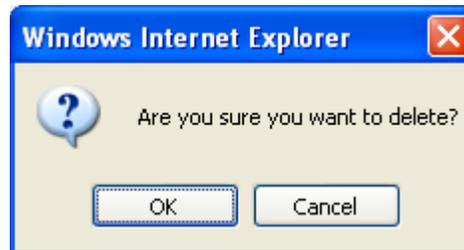
Activity Data ?

Student ID 999999999 ZAPIEN, DEANNIE - 999999999
Institution Code 01 Student Stat DV

Session	Activity Code	Description	Activity Date	Misc Code 1	Misc Code 2	Misc Code 3	Edit	Delete
A892	BUDGET	BUD CDS FOR SCHED COSTS	10/01/2008					

Delete icon

A message is displayed asking you to confirm the deletion:



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

10 Loan History Tab

Loan History Maintenance (FAM601)

Navigation: Student Access Bar → Loan History Tab

Application Setup Student Pell/Loan Processing Work Study Award Processing ISIR Processing Reports Custom Applications

Student ID: 999999999 ZAPIEN, DEANNIE - 999999999 Session From: Session To: Find

Student Award Financial Aid Academic Tracking Comment Activity Loans **Loan History** Clock Hours ISIR

Loan History Maintenance
Student ID 999999999 ZAPIEN, DEANNIE - 999999999
Award Year
Search

Award Year	Aggregate Combined Outstanding Balance	DL Master Prom Note	DL PLUS Master Prom Note	NSLDS Loan Default	Edit	Delete
12	413	N		Y		

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

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

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

To view loan history data for a student

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

Application Setup Student Pell/Loan Processing Work Study Award Processing ISIR Processing Reports Custom Applications

Student ID: 999999999 ZAPIEN, DEANNIE - 999999999 Session From: Session To: Find

Student Award Financial Aid Academic Tracking Comment Activity Loans **Loan History** Clock Hours ISIR

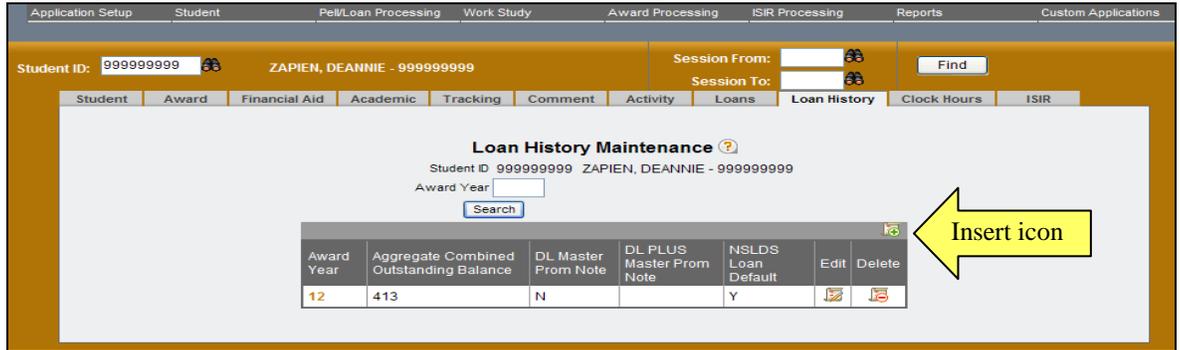
Loan History Maintenance
Student ID 999999999 ZAPIEN, DEANNIE - 999999999
Award Year
Search

Award Year	Aggregate Combined Outstanding Balance	DL Master Prom Note	DL PLUS Master Prom Note	NSLDS Loan Default	Edit	Delete
12	413	N		Y		

10.1 Adding Loan History Data

To manually add loan history data to a student record

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



Application Setup Student Pell/Loan Processing Work Study Award Processing ISIR Processing Reports Custom Applications

Student ID: 999999999 ZAPIEN, DEANNIE - 999999999 Session From: Session To: Find

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

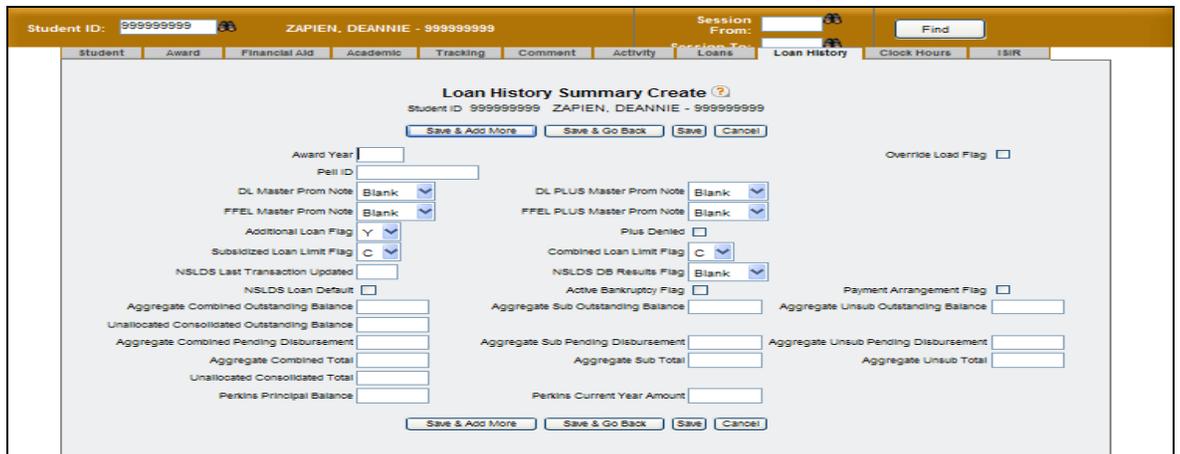
Loan History Maintenance

Student ID 999999999 ZAPIEN, DEANNIE - 999999999
Award Year
Search

Award Year	Aggregate Combined Outstanding Balance	DL Master Prom Note	DL PLUS Master Prom Note	NSLDS Loan Default	Edit	Delete
12	413	N		Y		

Insert icon

The Loan History Summary Create page is displayed:



Student ID: 999999999 ZAPIEN, DEANNIE - 999999999 Session From: Session To: Find

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

Loan History Summary Create

Save & Add More Save & Go Back Save Cancel

Award Year Override Load Flag

Pell ID

DL Master Prom Note

FFEL Master Prom Note

Additional Loan Flag

Subsidized Loan Limit Flag

NSLDS Last Transaction Updated

NSLDS Loan Default

Aggregate Combined Outstanding Balance

Unallocated Consolidated Outstanding Balance

Aggregate Combined Pending Disbursement

Aggregate Combined Total

Unallocated Consolidated Total

Perkins Principal Balance

DL PLUS Master Prom Note

FFEL PLUS Master Prom Note

Plus Denied

Combined Loan Limit Flag

NSLDS DB Results Flag

Active Bankruptcy Flag

Aggregate Sub Outstanding Balance

Aggregate Sub Pending Disbursement

Aggregate Sub Total

Aggregate Unsub Outstanding Balance

Aggregate Unsub Pending Disbursement

Aggregate Unsub Total

Payment Arrangement Flag

Save & Add More Save & Go Back Save Cancel

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

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

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

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

10.2 Updating Loan History Data

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

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

The Loan History Summary Edit page is displayed:

Loan History Summary Edit 

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

Award Year 12 Override Load Flag

Pell ID

DL Master Prom Note DL PLUS Master Prom Note

FFEL Master Prom Note FFEL PLUS Master Prom Note

Additional Loan Flag Plus Denied

Subsidized Loan Limit Flag Combined Loan Limit Flag

NSLDS Last Transaction Updated NSLDS DB Results Flag

NSLDS Loan Default Active Bankruptcy Flag Payment Arrangement Flag

Aggregate Combined Outstanding Balance Aggregate Sub Outstanding Balance Aggregate Unsub Outstanding Balance

Unallocated Consolidated Outstanding Balance

Aggregate Combined Pending Disbursement Aggregate Sub Pending Disbursement Aggregate Unsub Pending Disbursement

Aggregate Combined Total Aggregate Sub Total Aggregate Unsub Total

Unallocated Consolidated Total

Perkins Principal Balance Perkins Current Year Amount

Loan Sequence Number	Grade Level	Status	Program Code	Begin Date	End Date	Net Amount	Aggregate Principal Balance	Aggregate Principal Balance Date	Edit	Delete
1	1	DU	SF	09/21/1998	06/09/1999	875	413	06/16/2010		

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

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

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

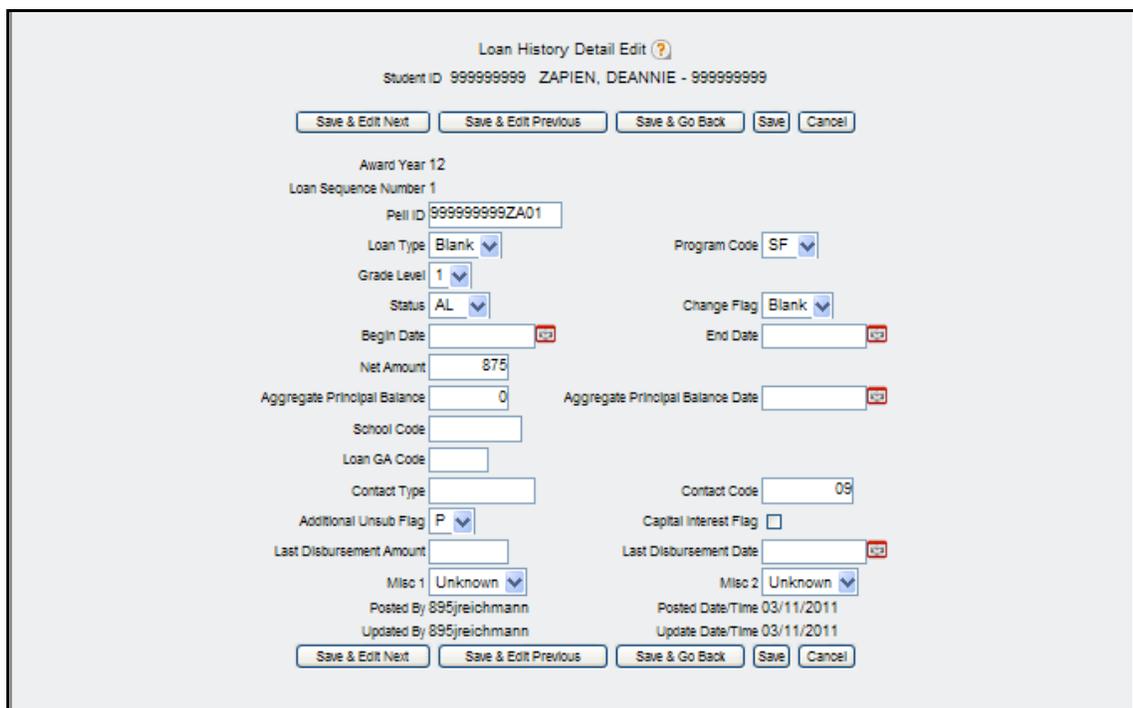
To update loan history data (detail data) for a student

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

The Loan History Summary Edit page is displayed.

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

The Loan History Detail Edit page is displayed:



Loan History Detail Edit 

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

Save & Edit Next Save & Edit Previous Save & Go Back Save Cancel

Award Year 12
Loan Sequence Number 1

Pell ID 999999999ZA01

Loan Type Blank Program Code SF

Grade Level 1

Status AL Change Flag Blank

Begin Date End Date

Net Amount 875

Aggregate Principal Balance 0 Aggregate Principal Balance Date

School Code

Loan GA Code

Contact Type Contact Code 09

Additional Unsub Flag P Capital Interest Flag

Last Disbursement Amount Last Disbursement Date

Misc 1 Unknown Misc 2 Unknown

Posted By 895jreichmann Posted Date/Time 03/11/2011

Updated By 895jreichmann Update Date/Time 03/11/2011

Save & Edit Next Save & Edit Previous Save & Go Back Save Cancel

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

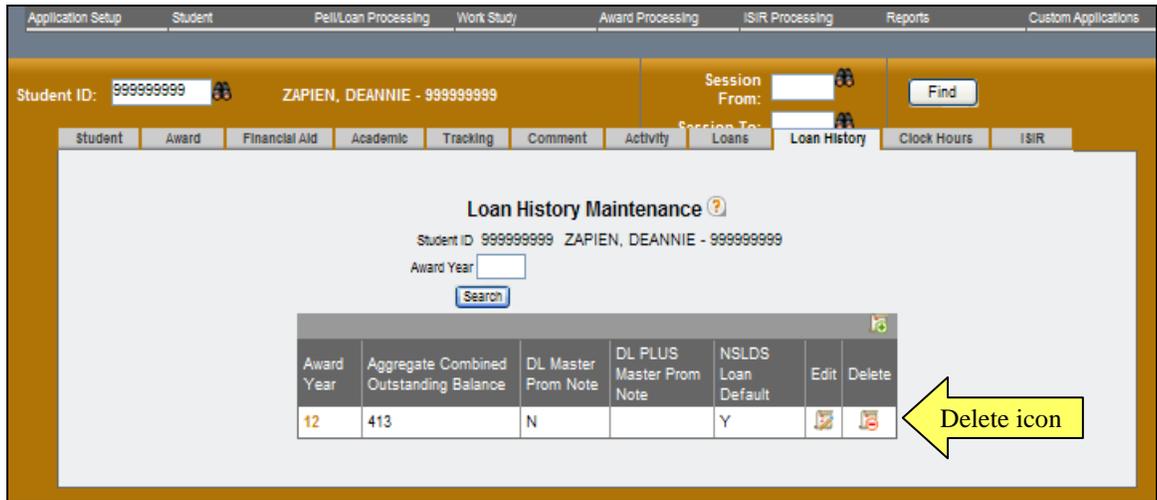
Click the Cancel button if you do not want to save the changes.

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

10.3 Deleting Loan History Data

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

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



Student ID: 999999999 ZAPIEN, DEANNIE - 999999999

Session From: [] Find

Session To: []

Loan History Maintenance

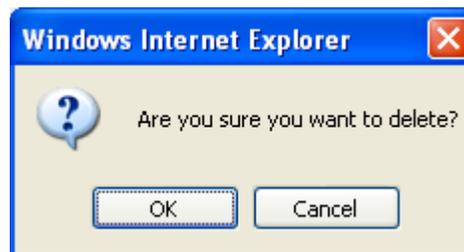
Student ID 999999999 ZAPIEN, DEANNIE - 999999999

Award Year [] Search

Award Year	Aggregate Combined Outstanding Balance	DL Master Prom Note	DL PLUS Master Prom Note	NSLDS Loan Default	Edit	Delete
12	413	N		Y		

Delete icon

A message is displayed asking you to confirm the deletion:



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

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

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

The Loan History Summary Edit page is displayed:

Loan History Summary Edit 

Student ID 999999999 ZAPIEN, DEANNIE - 999999999

Award Year 12 Override Load Flag

Pell ID

DL Master Prom Note DL PLUS Master Prom Note

FFEL Master Prom Note FFEL PLUS Master Prom Note

Additional Loan Flag Plus Denied

Subsidized Loan Limit Flag Combined Loan Limit Flag

NSLDS Last Transaction Updated NSLDS DB Results Flag

NSLDS Loan Default Active Bankruptcy Flag Payment Arrangement Flag

Aggregate Combined Outstanding Balance Aggregate Sub Outstanding Balance Aggregate Unsub Outstanding Balance

Unallocated Consolidated Outstanding Balance Aggregate Sub Pending Disbursement Aggregate Unsub Pending Disbursement

Aggregate Combined Pending Disbursement Aggregate Sub Total Aggregate Unsub Total

Aggregate Combined Total Aggregate Unsub Total

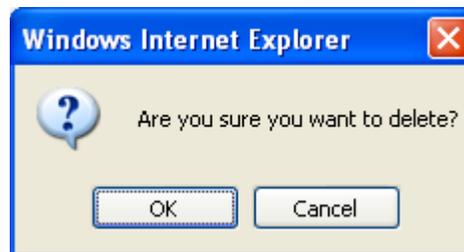
Unallocated Consolidated Total Aggregate Unsub Total

Perkins Principal Balance Perkins Current Year Amount

Loan Sequence Number	Grade Level	Status	Program Code	Begin Date	End Date	Net Amount	Aggregate Principal Balance	Aggregate Principal Balance Date	Edit	Delete
1	1	DU	SF	09/21/1998	06/09/1999	875	413	06/16/2010		

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

A message is displayed asking you to confirm the deletion:



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