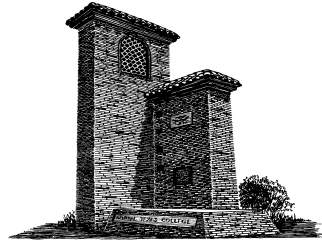


Colleague Learning Guide

Financial Aid

**CENTRAL
TEXAS
COLLEGE**



Education for the Individual

Financial Aid
Central Texas College

Central Texas College
COLLEAGUE LEARNING GUIDE

Financial Aid

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Revision History

<i>Date</i>	<i>Page(s)</i>	<i>Added/Updated</i>	<i>Description</i>
7-13-05	N/A	Added	Revision History
7-13-05	10	Deleted	Deleted NAS Need Analysis Summary Screen
7-13-05	11	Deleted	Deleted NAWC Application Workflow Choices

5/18/2006	4	Updated	Enhanced Table of Contents
5/18/2006	5	Updated	Added Quick Access next to Mnemonic for those of us that have the new UI
5/18/2006	7	Updated	Verbaige Revision/Verification Status
5/18/2006	8	Updated	Verbaige Revision on File Cmpl and updated figure 5
5/18/2006	11	Updated	Verbaige Revision on CRI
5/18/2006	13 and 14	Updated	Verbaige Revision on AIDE
5/18/2006	16	Updated/Added	Verbaige Revision on DAV
5/18/2006	17	Added	Verbaige Revision on DAV
5/18/2006	18	Added	Contact Information Page

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The Family Educational Rights and Privacy Act of 1974 grants to students certain rights, privileges, and protections relative to individually identifiable student educational records which are maintained by the College. Central Texas College’s institutional policy is consistent with the intent, guarantees, and safeguards embodied in the legislation.

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Process: FASI Screen

- A. In the **ST** module, enter **FASI (Financial Aid Status Info)** in the **Quick Access/Mnemonic** box, and click on **Go**.

- B. In the **Academic Year LookUp** prompt, the current year is the default. Click on **OK**.

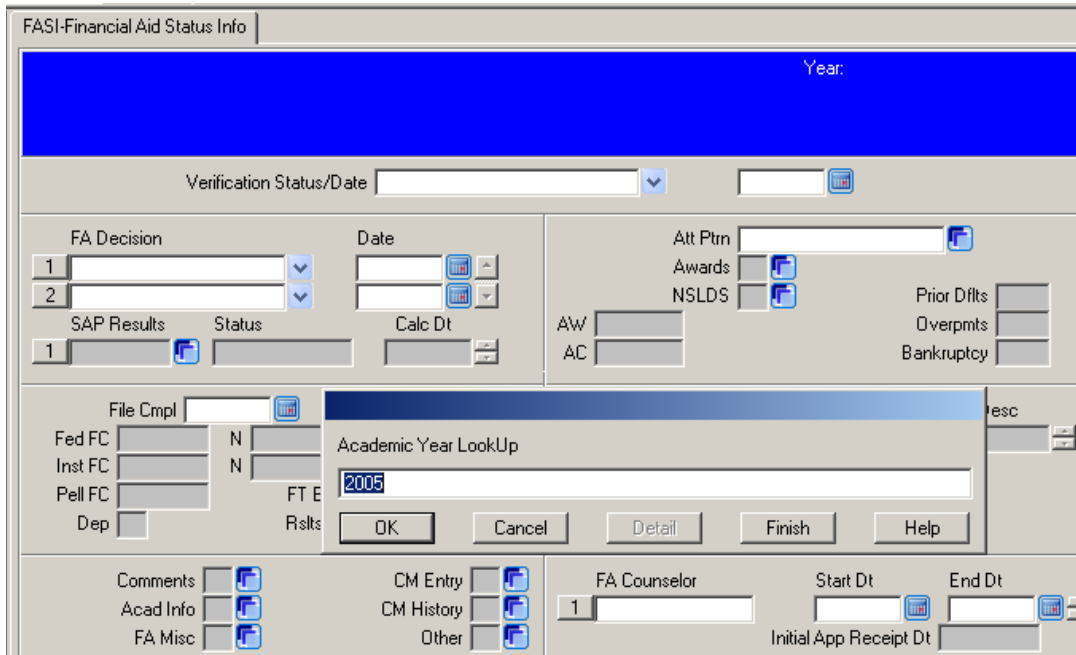


Figure 1

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C. In the **Person LookUp** prompt, enter the SSN, Student ID, or Name (see Figure 2), and click on **OK**. Based upon the entry, the student may have to be selected from the resolution screen.

The screenshot shows the 'FASI-Financial Aid Status Info' application window for the year 2005. The interface is divided into several sections. At the top, there is a blue header bar with 'Year: 2005'. Below this is a 'Verification Status/Date' dropdown menu. The main area contains several input fields and checkboxes. On the left, there are 'FA Decision' (with dropdowns for '1' and '2') and 'Date' (with a calendar icon). Below these are 'SAP Results' and 'Status' (with a dropdown for '1') and 'Calc Dt' (with a calendar icon). On the right, there are 'Alt Ptn', 'Awards', 'NSLDS', 'Prior Dflts', 'Overpmts', and 'Bankruptcy' checkboxes. In the center, there is a 'Person LookUp' dialog box with a text input field and buttons for 'OK', 'Cancel', 'Detail', 'Finish', and 'Help'. At the bottom, there are 'Comments', 'Acad Info', 'FA Misc', 'CM Entry', 'CM History', and 'Other' checkboxes, along with 'FA Counselor', 'Start Dt', 'End Dt', and 'Initial App Receipt Dt' fields.

Figure 2

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D. The **Verification Status/Date** field is currently blank for the student, Barbie Test (see Figure 3). When the field is blank, the student has not been selected for verification. The field will remain blank as long as student is not selected for verification by Department of Education. When the field indicates a 2, this means the student has been selected for verification by DOE and the student has not yet been verified by the Financial Aid office. The **Verification Status/Date** field should indicate **7 Verification Complete** after the F/A office verifies the student PELL file.

The screenshot shows the 'FASI-Financial Aid Status Info' form for the year 2005. The 'Verification Status/Date' field is currently blank. A dropdown menu is open, showing the following options:

- 1 Institution Selected
- 2 CPS Selected
- 3 COLLEAGUE Requested
- 4 Verification Letter Sent
- 5 Data Entered/Updt Pending
- 6 Updated but not Complete
- 7 Verification Complete
- 8 Institution Not Verifying

Other fields visible on the form include:

- FA Decision: 1
- SAP Results: 1
- File Cmpl: [blank]
- Post-Sec Inst At: 1
- FA Counselor: 1

Figure 3

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E. The **File Cmpl** field will either be blank or have a date. If the field is blank, it means that the Pell file is incomplete (see Figure 4).

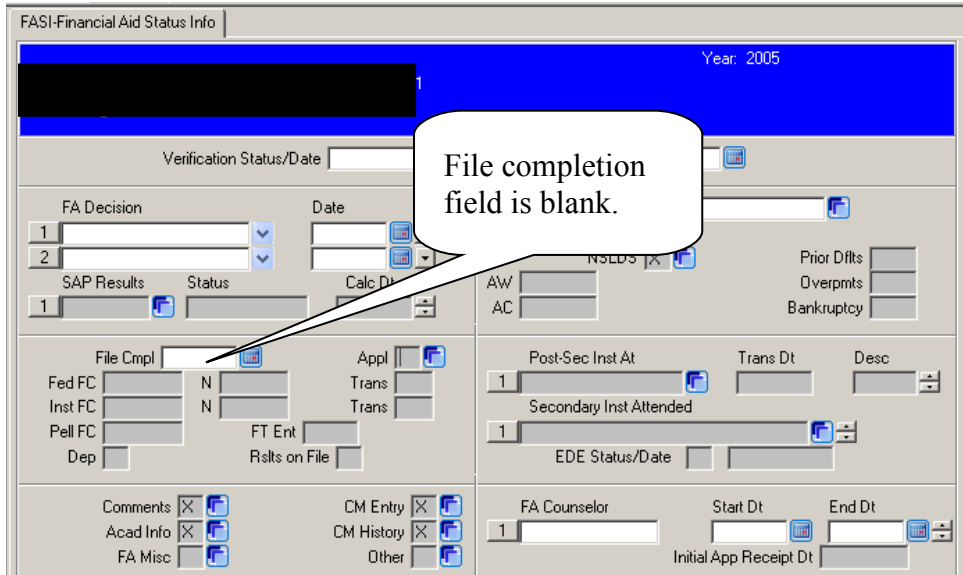


Figure 4

If there is a date in the field (see Figure 5), it indicates that the Pell file is complete. The Awards block will have an "X" indicating an award has been packaged. Once packaged the student award is instantly sitting on Web Advisor for student to print themselves a copy of their award letter and they **MUST** also "Accept or Reject" their PELL award on Web Advisor. We no longer mail award letter to students.

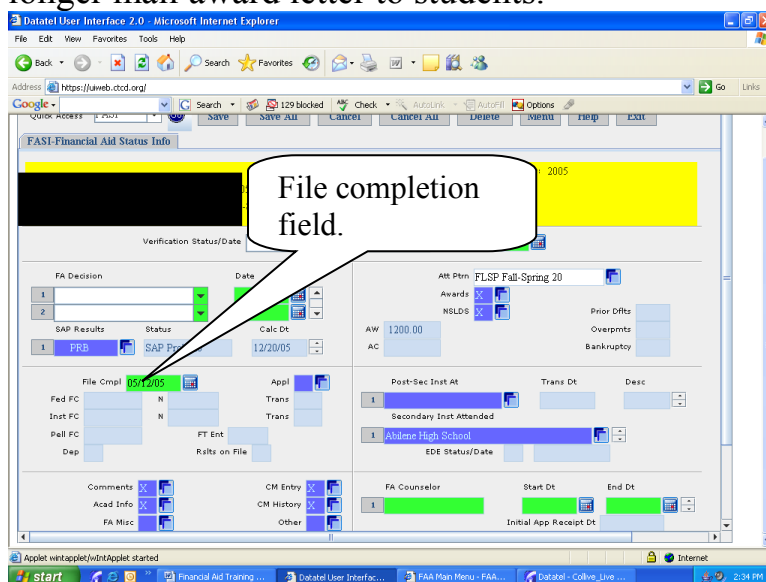


Figure 5

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Process: CRI–Communication Code Entry Screen

- A. On the **FASI** screen, click on the detail button (see Figure 6) in the **CM Entry** field, to view the **CRI** (Communication Code Entry) screen.

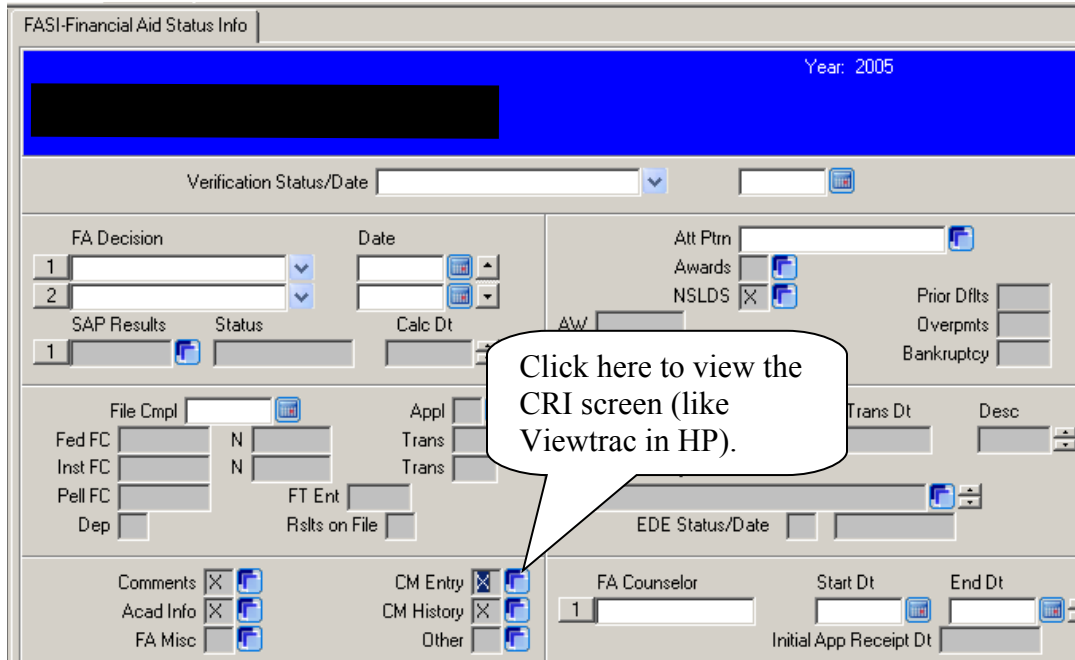


Figure 6

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B. In the following example (see Figure 7), Main Campus has received the downloaded Barbie Test FAFSA information from Department of Education. When Department of Education receives the FAFSA information either electronically or by U.S. Mail from the student, the student information is converted into an ISIR (Institutional Student Information Record) and sent electronically to the schools indicated on the student FAFSA. Showing below, on line 3 of Barbie Test, the screen displays that the 05/06 ISIR was received/downloaded on 05-11-05. The information on lines 1 and 2 are on the Missing Information Letter and on this date in the **Assgn Dt** field the MI letter and packet were created and mailed to the student's address.

The screenshot shows a software interface for tracking financial aid status. At the top, there are two tabs: "FASI-Financial Aid Status Info" and "CRI-Communication Code Entry". Below the tabs is a blue header bar with a redacted area. Underneath, there are fields for "Default File Suite Year" (set to 2005), "Origin" (a dropdown menu), and "Origin Date" (a date field). The main part of the screen is a table with the following columns: "Instance", "Communication Code", "Codes Description", "Status", "Stat Dt", "Assgn Dt", and "Act Dt".

Instance	Communication Code	Codes Description	Status	Stat Dt	Assgn Dt	Act Dt
1	F05CWPKT	FA In-House Packet			05/11/05	
2	F05CWKS	Worksheet B less than			05/11/05	
3	F05CISIR	05/06 ISIR	Received	05/11/05	05/11/05	
4						
5						
6						

Figure 7

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C. In the following example (see Figure 8), the **CRI** screen is showing that Barbie Test has returned her PELL packet (line 1) as annotated by the date in the **Stat Dt** field. Line 2 of the **CRI** screen shows Worksheet B is **Incomplete**. As a result of the **Incomplete** status main campus Financial Aid Office emails the student to get the information for BAH and the Financial Aid office will make the correction to the ISIR (Institutional Student Information Record). When the Financial Aid office receives the BAH information, the status will be changed from **Incomplete** to **Received** with a new date as indicated in the **Stat Dt** field.

The screenshot shows the 'FASI-CRI-Communication Code Entry' window. At the top, there are tabs for 'FASI-Financial Aid Status Info' and 'CRI-Communication Code Entry'. Below the tabs is a blue header bar with a blacked-out area. Underneath, there are input fields for 'Default File Suite Year' (set to 2005), 'Origin', and 'Origin Date'. The main area is a table with the following columns: Instance, Code, Description, Status, Stat Dt, Assgn Dt, and Act Dt. The table contains six rows of data:

Instance	Code	Description	Status	Stat Dt	Assgn Dt	Act Dt
1	F05CWPKT	FA In-House Packet	Received	05/12/05	05/11/05	
2	F05CWKS	Worksheet B less than	Incomplete	05/12/05	05/11/05	
3	F05CISIR	05/06 ISIR	Received	05/11/05	05/11/05	
4						
5						
6						

At the bottom of the window, it says 'Element Communication Codes' and 'Value 2/3'.

Figure 8

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Process: AIDE–Financial Aid Status Info Screen

- A. On the **FASI** screen, click on the detail button (see Figure 9) in the **Awards** field, to view the **AIDE** (Financial Aid Status Info) screen.

FASI-Financial Aid Status Info

Click on the detail button to view the AIDE screen.

Verification Status/Date 2 CPS Selected

FA Decision 1 2 Date

SAP Results Status Calc Dt

1

Att Ptm Partners C & I

Awards 4050.00

NSLDS

Prior Dflts

Overpmts

Bankruptcy

AW 4050.00

AC

File Cmpl

Appl

Fed FC 0 N 13926 Trans 01

Inst FC 0 N 13926 Trans 01

Pell FC 0 FT Ent 4050

Dep I Rslts on File Y

Post-Sec Inst At Trans Dt Desc

1

Secondary Inst Attended

1

EDE Status/Date

FA Counselor Start Dt End Dt

1

Initial App Receipt Dt 01/21/05

Figure 9

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B. The **AIDE** screen shows an award packaged on student (see Figure 10). The example has 0 EFC and 4050 packaged in the account. However, there is a **P** for **Pending** in the **Act** (Action) field. This means that the Financial Aid office has packaged the student for their PELL award, but student has not accepted the award on Web Advisor.

The account is pending Acceptance on Web Advisor.

Award	Description	Amount	Act	Date	A/R-Cred	CWS-Earn
1	PELL Federal PELL Grant Pr	4050.00	P	06/10/05		
2						
3						
4						

Awd Per	Amount	Act	Date	RDF	FA Cr	RG Cr	En	Exp Res	Act Res	Exp Hsg	Act Hsg
1 FAL05	2025.00	P	06/23/05		6.00		F		OTNR		No
2 SPR06	2025.00	P	06/23/05		6.00		F		OTNR		No
3 SU206	0.00	P	06/23/05		6.00		F		OTNR		No
4											
5											

Controller Awards Value 1/1

Figure 10

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C. The next screen shows the **AIDE** screen with **A** in the **Act (Action)** field (see Figure 11). The student has now accepted their award on Web Advisor. The student's PELL file is complete.

The student has accepted the award on Web Advisor.

CB	COA	13926	FC	0	Need	13926	Post	9876	UNeed	9876
Inst	Pell	13926		0	FT Ent	13926		4050.00	AC	4050.00

Award	Description	Amount	Act	Date	A/R-Cred	CWS-Earn
1	PELL	4050.00	A	06/23/05		
2						
3						
4						

Awd Per	Amount	Act	Date	RDF	FA Cr	RG Cr	En	Exp Res	Act Res	Exp Hsg	Act Hsg
1	FAL05	2025.00	A	06/23/05		6.00	F		OTNR		No
2	SPR06	2025.00	A	06/23/05		6.00	F		OTNR		No
3	SU206	0.00	A	06/23/05		6.00	F		OTNR		No
4											
5											

Element Awards Value 1/1

Figure 11

When the student's account is showing that she/he has been registered in the Colleague system, at some point in the day, the Financial Aid office will initiate a report and notify the Accounts Receivable office to allow the Title IV funds to transmit to Accounts Receivable.

Please be aware that federal regulations prohibit releasing Title IV funds prior to 10 days before start date of class.

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Process: DAV–Detail Award View Screen

- A. On the **AIDE** screen, click on the detail button (see Figure 12) in the **Award** field.
- B. In the **Menu** prompt, select **DAV-Detail Award View** (see Figure 12), and click on **OK**.

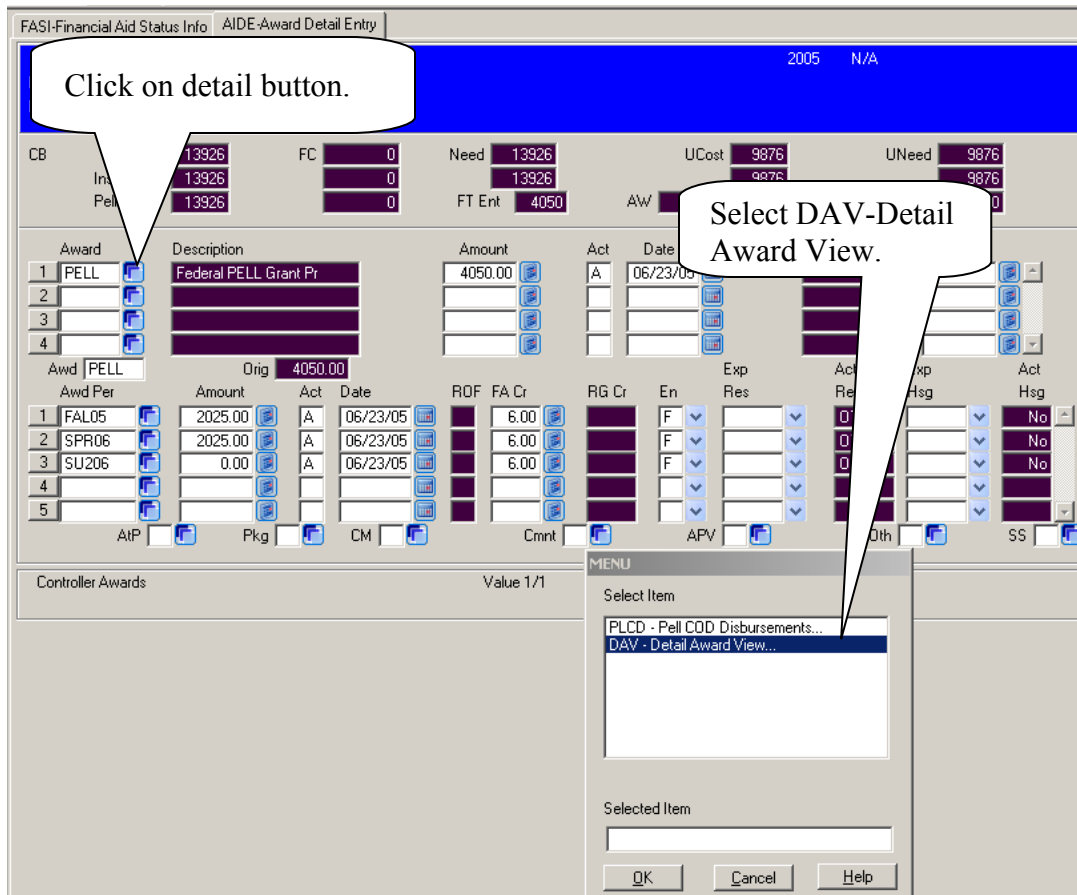


Figure 12

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- C. On the **DAV** screen (see Figure 13), in the **PELL Entitlement** field, the “total PELL year” eligibility is subdivided by the list below. Please note that in the Colleague system, 12 credit hours is Full-time. Most C&I students will be considered Half-time with 6 – 8 credit hours. Students who are enrolling in only 1-5 credit hours are considered Less-than-half-time and PELL is transmitted according to federal methodology.

F=Full-Time 12 or more credit hours in a semester

Q=Three-Quarter Time 9 – 11 credit hours in a semester

H=Half-time 6 - 8 credit hours in a semester

L=Less-than-half-time 1 – 5 credit hours in a semester

(Credit hours are accumulated during a semester-explained in the Example on the next page)

Take the award amount and divide it by 2.

Eligibility is subdivided in the **Pell Entitlement** field.

Award: **PELL** Federal Pell Grant Program
Pell Entitlement: F: 4050 Q: 3038 H: 2025 L: 1013

Award Period	Information	Amount	Action	AR	Credit	Amount	Over			
Period	Amount	Act	Date	Pri	F/P	Amount	Date	Remain	E	T
1	FAL05	2025.00	A	06/23/05	1	F				
2	SPR06	2025.00	A	06/23/05	1	F				
3	SU206	0.00	A	06/23/05	1	F				
4										
5										
6										
7										

Total Award Amount: 4,050.00
Original Award Amount: 4,050.00

Student Attendance Pattern:

Controller Award Period Information Value 1/3

Figure 13

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Please be aware that federal regulations prohibit releasing Title IV funds prior to 10 days before start date of class.

Example:

Student enrolled in Term 1 for 3 credit hours. Using the DAV screen on the previous page, this student is considered L-less than half time. \$1013 from the **PELL Entitlement Field** (the year entitlement) divide by 2 = \$506.50 and round up to \$507. Student would be eligible for \$507 for term 1 with 3 credit hours.

Now for Term 2 student enrolled in 6 credit hours. Colleague accumulates credit hours in a semester. This makes student in 9 credit hours for the semester. See the DAV screen indicates Q (three quarter time) amount is \$3038 (the year entitlement) divide by 2 = \$1519. But remember the student already was in a term 1 class and received \$507 so you would take the \$1519 and subtract \$507 and the amount of PELL that would transmit for the 6 credit hours in term 2 is \$1012. This comes out of the FALL Semester.

If student enrolls in SPRING classes, then student utilizes the second semester of PELL eligibility.

SUMMER semester: If a student is enrolled in summer classes, their funds should transmit to AR 10 days prior to start date of class. When the funds do transmit, you may check in Colleague for the amount or call this office and we will check for you.

August thru December is FALL Semester
January thru April is SPRING Semester
May thru July is SUMMER Semester

Financial Aid
Central Texas College

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