



PeopleSoft Training

Financial Aid

Version Date: November 2011

COPYRIGHT & TRADEMARKS

Copyright © 1998, 2011, Oracle and/or its affiliates. All rights reserved.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Table of Contents

| | |
|--|-----------|
| Financial Aid | 1 |
| Financial Aid | 1 |
| Financial Aid Terms | 1 |
| Student Budgets | 6 |
| Packaging Status Summary | 11 |
| Financial Aid Awards | 17 |
| Loan Origination Process - Common Line Prom Note-Stafford..... | 23 |
| Loan Origination Process - Run Control..... | 29 |
| View Customer Accounts | 35 |
| View NSLDS Data | 45 |
| 3 C's | 49 |
| How to Add Comments | 49 |
| How to Append or Update a Comment..... | 56 |
| How to Add Communications | 58 |
| How to Add a Checklist..... | 70 |
| How to Update a Checklist | 80 |
| Comments Summary | 82 |
| Communications Summary..... | 87 |
| Checklist Summary | 88 |
| Letter Generation Process | 90 |

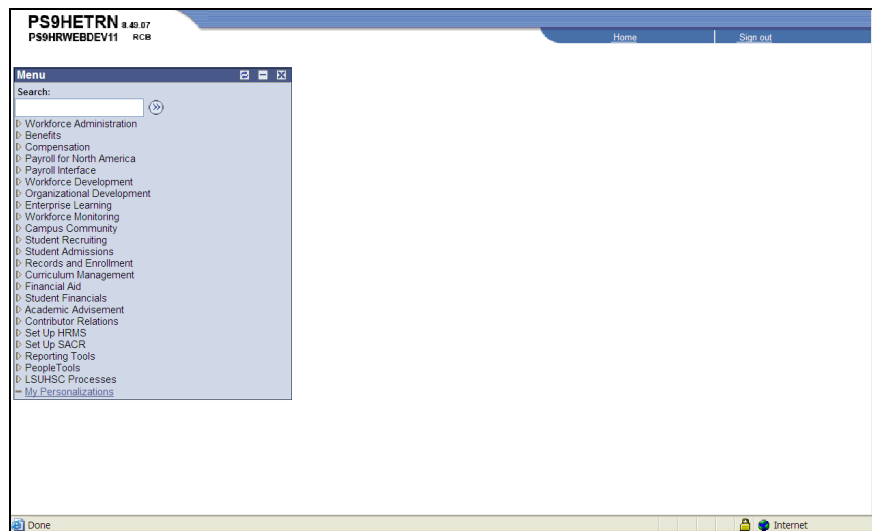
Financial Aid

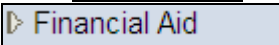
Financial Aid

Financial Aid Terms

Procedure

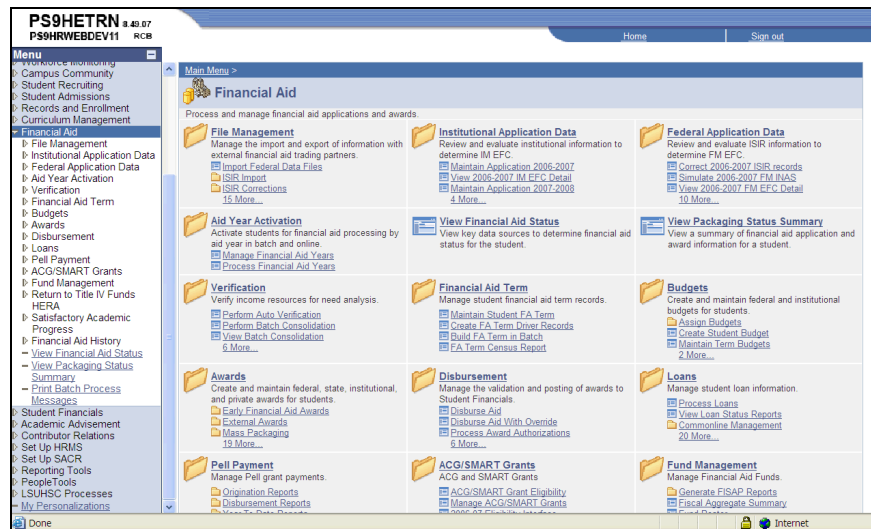
In this topic you will learn how to enter Financial Aid Terms.

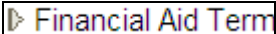



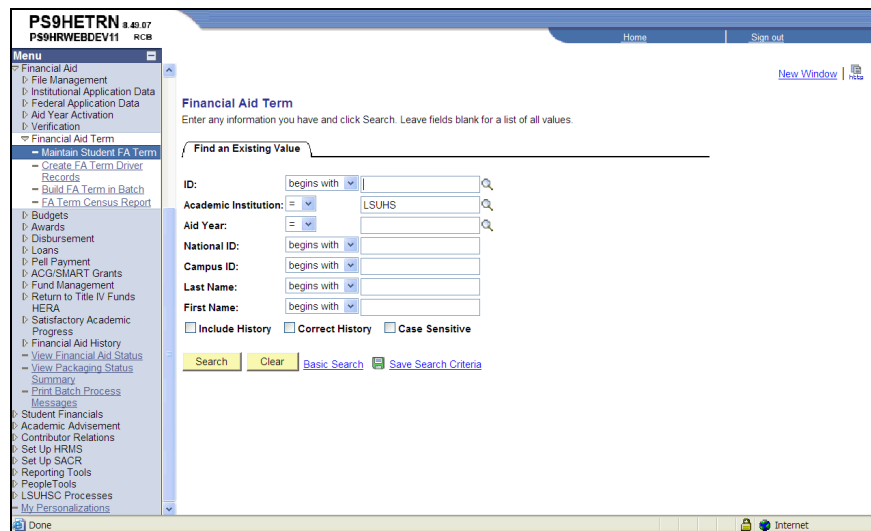
| Step | Action |
|------|--|
| 1. | Click <u>Financial Aid</u> link from the menu.  |


Training Guide


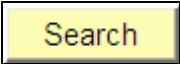
Financial Aid

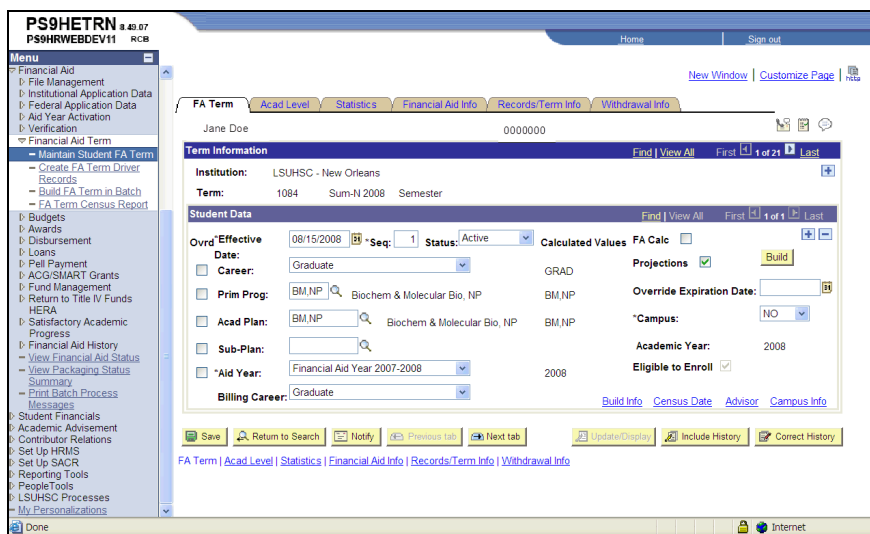



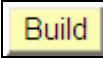

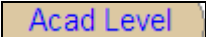
| Step | Action |
|------|---|
| 2. | Click the Financial Aid Term link.  |
| 3. | Click the Maintain Student FA Term link.  |



| Step | Action |
|------|--|
| 4. | Enter the desired information into the ID field. Enter " 0000000 ". |
| 5. | Click the Look up Aid Year button.  |

| Step | Action |
|------|---|
| 6. | Click an entry in the Description column.  |
| 7. | Click the Search button.  |



| Step | Action |
|------|---|
| 8. | Click the Collapse Menu button.  |
| 9. | Click the Build button.  |
| 10. | Click the Show next row button.  |
| 11. | Click the Acad Level tab.  |

Training Guide

Financial Aid



PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page Help

FA Term Acad Level Statistics Financial Aid Info Records/Term Info Withdrawal Info

Jane Doe 0000000

Term Information Find View All First 2 of 21 Last

Institution: LSUHSC - New Orleans Term: Spr-N 2008 Semester

Student Data Find View All First 1 of 1 Last

Effective Date: 05/15/2008 Seq: 1 Status: Active

Academic Career: Graduate Primary Program: Biochem & Molecular Bio, NP

Academic Plan: Biochem & Molecular Bio, NP Academic Sub-Plan:

Calculated Values

Overd

Form of Study: Candidacy Course Load Pct: 0.00

Approved Academic Load: Full-Time

Academic Load: F Full-Time

Financial Aid Load: F Full-Time

Academic Level: GR Graduate

Projected: GR Graduate

Start: GR Graduate


End: GR Graduate

View HERA Academic Level

Save Return to Search Notify Previous tab Next tab Update/Display Include History Correct History

FA Term Acad Level Statistics Financial Aid Info Records/Term Info Withdrawal Info

Done Internet

| Step | Action |
|------|---|
| 12. | Click Projected Graduate Lookup button. |
| |  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Help

Look Up Projected

SetID: LSUHS

Academic Level Rule: GRAD

Academic Level: =

Look Up Clear Cancel Basic Lookup

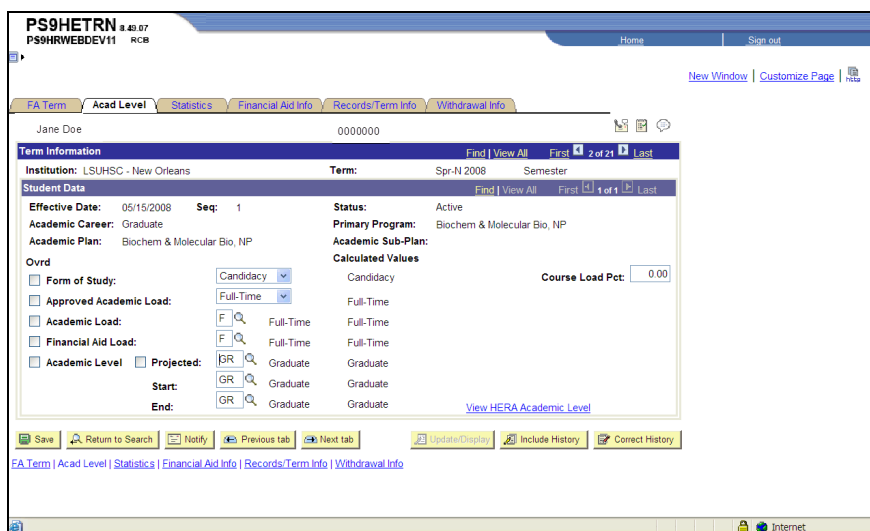
Search Results View All First 1 of 1 Last

Academic Level


Graduate

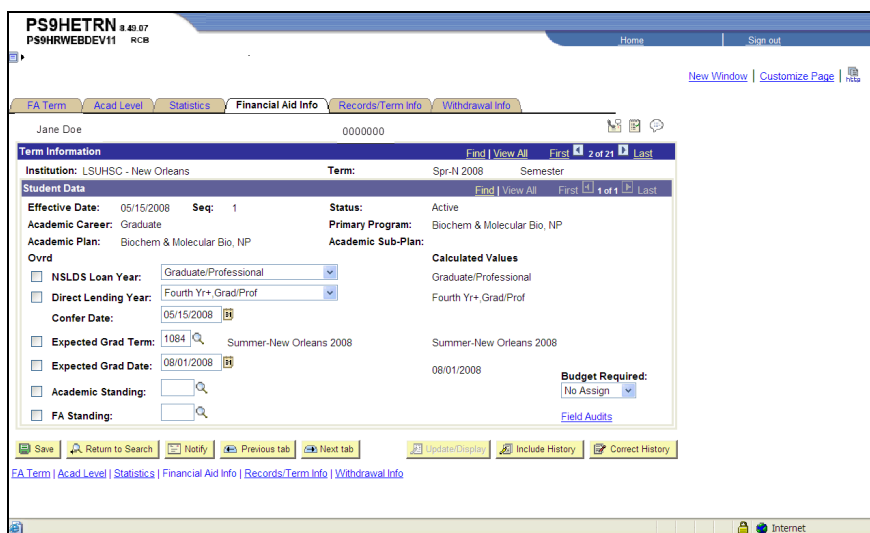
Internet

| Step | Action |
|------|---|
| 13. | Click an entry in the Academic Level column. |
| | Graduate |




The screenshot shows the PS9HETRN Financial Aid Info tab. The top navigation bar includes tabs for FA Term, Acad Level, Statistics, Financial Aid Info (selected), Records/Term Info, and Withdrawal Info. The main content area displays student information for Jane Doe (ID 0000000) at LSUHSC - New Orleans, Spr-N 2008 Semester. The Student Data section shows Effective Date: 05/15/2008, Seq: 1, Status: Active, Academic Career: Graduate, Primary Program: Biochem & Molecular Bio, NP, Academic Plan: Biochem & Molecular Bio, NP, Academic Sub-Plan: Biochem & Molecular Bio, NP. The Overd section includes checkboxes for Form of Study, Approved Academic Load, Academic Load, Financial Aid Load, and Academic Level, with dropdown menus for Candidacy, Full-Time, Graduate, and Projected. The Calculated Values section shows Course Load Pct: 0.00. The bottom navigation bar includes buttons for Save, Return to Search, Notify, Previous tab, Next tab, Update/Display, Include History, and Correct History.

| Step | Action |
|------|---|
| 14. | Click the Financial Aid Info tab.  |



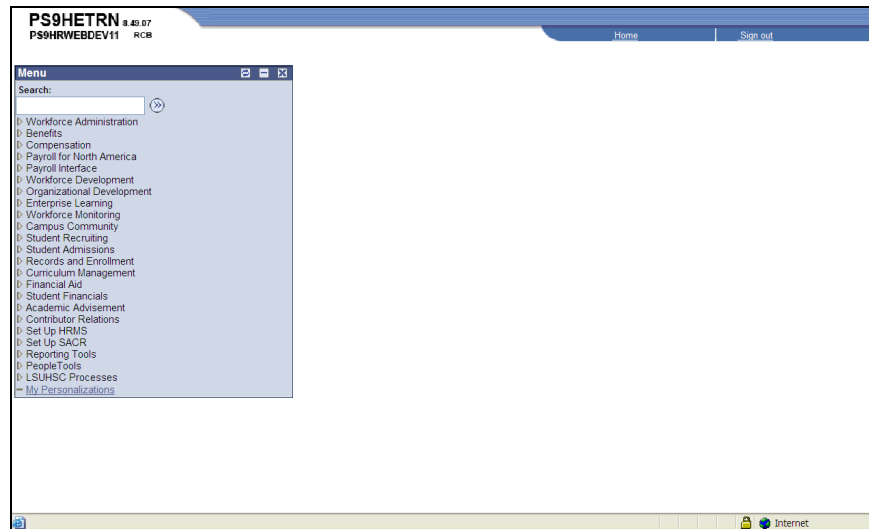
The screenshot shows the PS9HETRN Financial Aid Info tab with the Expected Grad Date checkbox selected. The top navigation bar includes tabs for FA Term, Acad Level, Statistics, Financial Aid Info (selected), Records/Term Info, and Withdrawal Info. The main content area displays student information for Jane Doe (ID 0000000) at LSUHSC - New Orleans, Spr-N 2008 Semester. The Student Data section shows Effective Date: 05/15/2008, Seq: 1, Status: Active, Academic Career: Graduate, Primary Program: Biochem & Molecular Bio, NP, Academic Plan: Biochem & Molecular Bio, NP, Academic Sub-Plan: Biochem & Molecular Bio, NP. The Overd section includes checkboxes for NSLDS Loan Year, Direct Lending Year, Confer Date, Expected Grad Term, Expected Grad Date (selected), Academic Standing, and FA Standing, with dropdown menus for Graduate/Professional, Fourth Yr+ Grad/Prof, Summer-New Orleans 2008, and 08/01/2008. The Calculated Values section shows Graduate/Professional, Fourth Yr+ Grad/Prof, Summer-New Orleans 2008, 08/01/2008, and Budget Required: No Assign. The bottom navigation bar includes buttons for Save, Return to Search, Notify, Previous tab, Next tab, Update/Display, Include History, and Correct History.

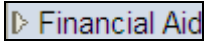
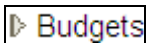

| Step | Action |
|------|--|
| 15. | Select the Expected Grad Date checkbox  |
| 16. | This completes this topic on Financial Aid Terms. End of Procedure. |

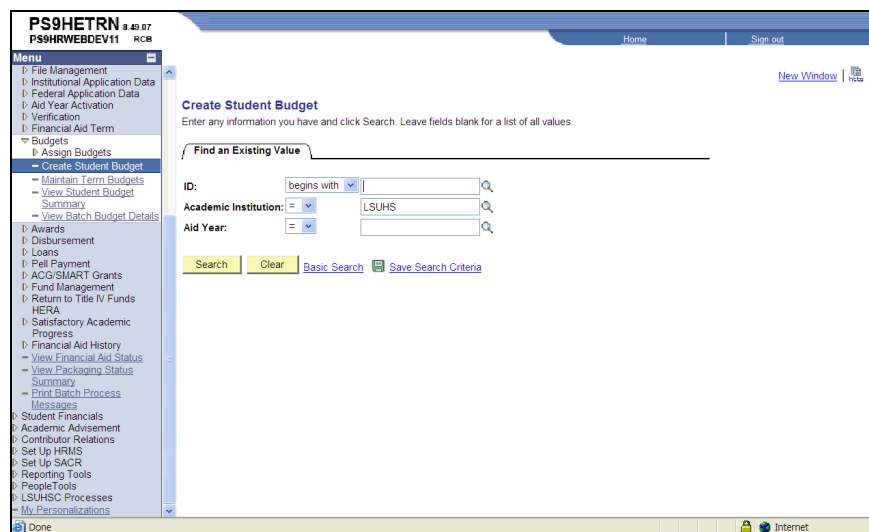
Student Budgets


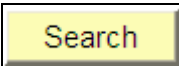
Procedure

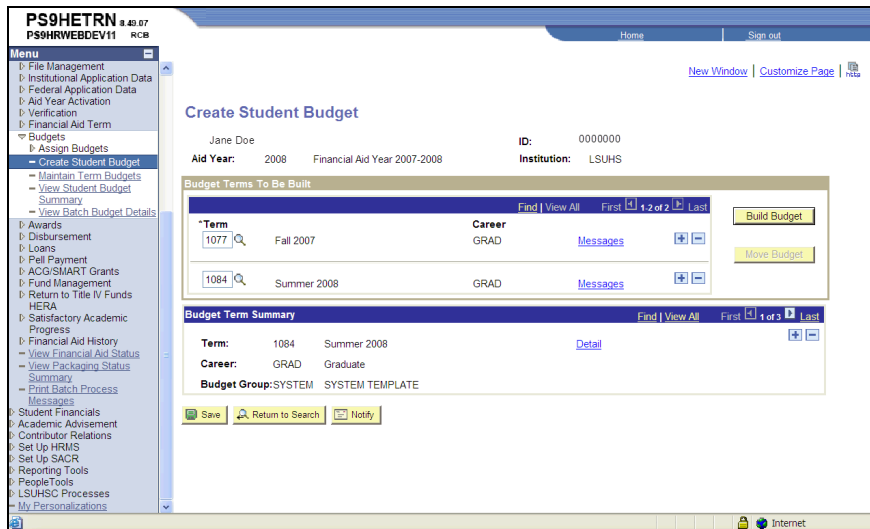
In this topic you will learn how to Create Student Budget.



| Step | Action |
|------|---|
| 1. | Click the Financial Aid link.  |
| 2. | Click the Budgets link.  |
| 3. | Click the Create Student Budget link.  |



| Step | Action |
|------|--|
| 4. | Enter the desired information into the ID field. Enter "0000000". |
| 5. | Click the Look up Aid Year button.  |
| 6. | Click an entry in the Description column. <u>Financial Aid Year 2007-2008</u> |
| 7. | Click the Search button.  |



PS9HETRN 4.03.07
PS9HWEBDEV11 RCB

Home Sign out

New Window Customize Page

Create Student Budget

Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHSC

Budget Terms To Be Built




| *Term | Term | Career | Messages | Build Budget | Move Budget |
|-------|-------------|--------|----------|--------------|-------------|
| 1077 | Fall 2007 | GRAD | Messages | + | - |
| 1084 | Summer 2008 | GRAD | Messages | + | - |

Budget Term Summary

| Term | Term | Career | Detail |
|------|-------------|--------|----------|
| 1084 | Summer 2008 | GRAD | Graduate |

Budget Group: SYSTEM SYSTEM TEMPLATE

Save Return to Search Notify

| Step | Action |
|------|---|
| 8. | Click the Collapse Menu button.  |
| 9. | Click the Add a new row button to insert a row.  |
| 10. | Click the Look up Term button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Look Up Term

ID: 0000000

Aid Year: begins with []

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-3 of 3 Last

| Academic Institution | Term | Aid Year |
|----------------------|------|----------|
| LSUHS | 1084 | 2008 |
| LSUHS | 1081 | 2008 |
| LSUHS | 1077 | 2008 |

| Step | Action |
|------|--|
| 11. | Click an entry in the Aid Year column. 1081 |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Create Student Budget

Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year: 2007-2008 Institution: LSUHS

Budget Terms To Be Built

| Term | Term | Career | Messages |
|------|-------------|--------|----------|
| 1077 | Fall 2007 | GRAD | Messages |
| 1081 | Spring 2008 | GRAD | Messages |

Build Budget Move Budget

Budget Term Summary

Term: 1084 Summer 2008 Detail
Career: GRAD Graduate
Budget Group: SYSTEM SYSTEM TEMPLATE

Save Return to Search Notify

| Step | Action |
|------|--|
| 12. | Click the Build Budget button. Build Budget |
| 13. | Click the Detail link. Detail |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Term: 1084
Career: GRAD

Student Budget Information

| | | | |
|----------------------|---------------------|-----------|-----------------------------------|
| Dependency Status: | Loan Year: | Grad/Prof | Term Detail |
| Housing Status: | Study Form: | CAND | |
| Marital Status: | Academic Plan: | BM NP | Enrollment Detail |
| Financial Aid Load: | Sub-Plan: | | |
| Family Members: | State of Residence: | | |
| App State Residence: | Postal Code: | | |

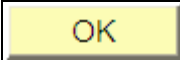
Budget Group: SYSTEM

Budget Items

| Category | Item Code | Description | Amount | Rule | Item Stat |
|----------|-----------|----------------------------|----------|---------|-----------|
| BOOK | | | | Formula | Warning |
| INSU | | | | Formula | Warning |
| LVI | | | | Formula | Warning |
| LOAN | LOINOG | NO Grad Avg Loan Fees | 18.00 | Formula | Found |
| TUIT | NGR2 | No Grad Res Summer Tuition | 1,107.00 | Formula | Found |

OK Cancel

Internet

| Step | Action |
|------|--|
| 14. | Click the OK button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Create Student Budget

Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

Budget Terms To Be Built


| Term | Career | Messages |
|-----------------------|--------------------------|------------------------------|
| 1077 Fall 2007 GRAD | Messages | Build Budget |
| 1081 Spring 2008 GRAD | Messages | Move Budget |

Budget Term Summary

| Term | Career | Budget Group |
|------------------|---------------|------------------------|
| 1084 Summer 2008 | GRAD Graduate | SYSTEM SYSTEM TEMPLATE |

[Save](#) [Return to Search](#) [Notify](#)

Done Internet

| Step | Action |
|------|---|
| 15. | Click the Show next row button.  |
| 16. | Click the Detail link. Detail |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Customize Page | Help

Term: 1081
Career: GRAD

Student Budget Information

| | | | |
|----------------------|---------------------|-----------|-----------------------------------|
| Dependency Status: | Loan Year: | Grad/Prof | Term Detail |
| Housing Status: | Study Form: | CAND | |
| Marital Status: | Academic Plan: | BM NP | Enrollment Detail |
| Financial Aid Load: | Sub-Plan: | | |
| Family Members: | State of Residence: | | |
| App State Residence: | Postal Code: | | |

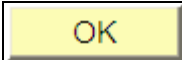
Budget Group: SYSTEM

Budget Items

| Category | Item Code | Description | Amount | Rule | Item Stat | 1 of 5 |
|----------|-----------|------------------------------|----------|---------|-----------|-------------------------------------|
| BOOK | GRST | Grad Studies Books | 968.00 | Formula | Found | + - |
| INSU | INSUN1 | NO Insurance/Stick Fee | 630.00 | Formula | Found | + - |
| LVI | | | | Formula | Warning | + - |
| LOAN | LONOG | NO Grad Avg Loan Fees | 18.00 | Formula | Found | + - |
| TUIT | NGR1 | NO Grad Res Semester Tuition | 2,095.00 | Formula | Found | + - |

OK Cancel

Internet

| Step | Action |
|------|--|
| 17. | Click the OK button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Customize Page | Help

Create Student Budget

Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

Budget Terms To Be Built

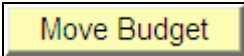
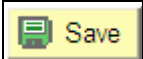
| Term | Career | Messages | Build Budget | Move Budget |
|-----------------------|--------------------------|-------------------------------------|------------------------------|-----------------------------|
| 1077 Fall 2007 GRAD | Messages | + - | Build Budget | Move Budget |
| 1081 Spring 2008 GRAD | Messages | + - | | |

Budget Term Summary

| Term | Career | Budget Group | SYSTEM TEMPLATE |
|------------------|---------------|--------------|-----------------|
| 1081 Spring 2008 | GRAD Graduate | SYSTEM | |

Save Return to Search Notify

Done Internet

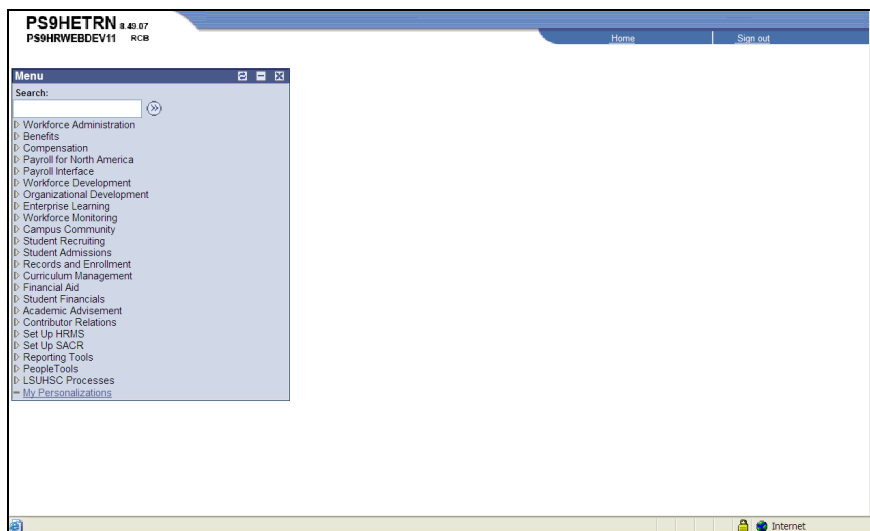
| Step | Action |
|------|---|
| 18. | Click the Move Budget button.  |
| 19. | Click the Save button.  |

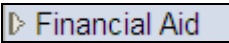
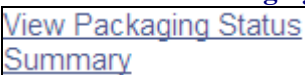
| Step | Action |
|------|---|
| 20. | This completes the topic on Creating Student Budgets. End of Procedure. |

Packaging Status Summary

Procedure

In this topic you will learn the process of Packaging Status Summary.



| Step | Action |
|------|---|
| 1. | Click the Financial Aid link.  |
| 2. | Click the View Packaging Status Summary link.  |

Training Guide

Financial Aid



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Help](#)

Menu

- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
 - File Management
 - Institutional Application Data
 - Federal Application Data
 - Aid Year Activation
 - Verification
 - Financial Aid Term
 - Budgets
 - Awards
 - Disbursement
 - Loans
 - Pell Payment
 - ACG/SMART Grants
 - Fund Management
 - Return to Title IV Funds
 - HERA
 - Satisfactory Academic Progress
 - Financial Aid History
 - View Financial Aid Status
- View Packaging Status Summary
- Print Batch Process Messages
- Student Financials
- Academic Advisement
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Reporting Tools
- PeopleTools
- LSUHSC Processes
- My Personalizations

Packaging Status Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID:

Academic Institution:

Aid Year:

National ID:



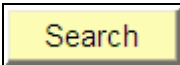
Campus ID:

Last Name:

First Name:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

| Step | Action |
|------|--|
| 3. | Enter the desired information into the ID field. Enter " 0000000 ". |
| 4. | Click the Look up Aid Year button.  |
| 5. | Click an entry in the Aid Year column.  |
| 6. | Click the Search button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Menu

- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
 - File Management
 - Institutional Application Data
 - Federal Application Data
 - Aid Year Activation
 - Verification
 - Financial Aid Term
 - Budgets
 - Awards
 - Disbursement
 - Loans
 - Pell Payment
 - ACG/SMART Grants
 - Fund Management
 - Return to Title IV Funds
 - HERA
 - Satisfactory Academic Progress
 - Financial Aid History
 - View Financial Aid Status
- View Packaging Status Summary
- Print Batch Process Messages
- Student Financials
- Academic Advisement
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Reporting Tools
- PeopleTools
- LSUHSC Processes
- My Personalizations

Packaging Status Summary

Jane Doe
Aid Year: 2008 Financial Aid Year 2007-2008 ID: 0000000
Institution: LSUHS

EFC Status: Unofficial [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Academic Career: Graduate

Aid Processing Status:

Aid Application Status: *Satisfactory Academic Progress:

Review Status: Disbursement Hold:

INST Verification Status: Loan Entrance Interview Status:

Verification Flag: Exit Interview:

Verification Status:


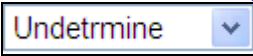
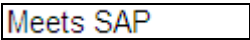
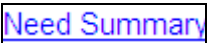
Scholarship Status: [Financial Aid Awarded](#) [Award Notification](#)

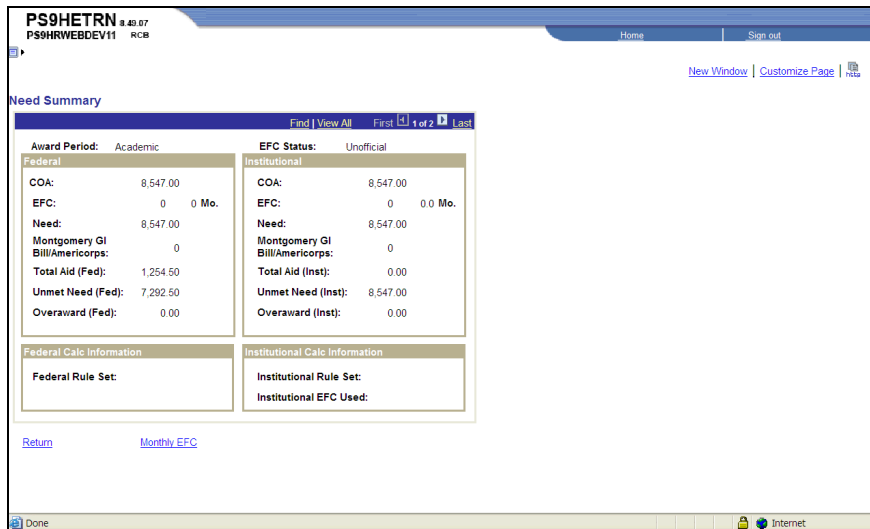
*Aid Packaging Method:

Packaging Plan ID:

Repackaging Plan ID:

Self Service
Award Access:


| Step | Action |
|------|--|
| 7. | Click the Collapse Menu button.  |
| 8. | Click the Satisfactory Academic Progress list.  |
| 9. | Click the Meets SAP list item.  |
| 10. | Click the Need Summary link.  |



The screenshot shows the 'Need Summary' page in the PS9HETRN system. The page displays financial aid information for a student, comparing Federal and Institutional aid. The 'Award Period' is set to 'Academic' and the 'EFC Status' is 'Unofficial'. The 'Federal' section shows a COA of 8,547.00, EFC of 0, and a Total Aid of 1,254.50. The 'Institutional' section shows a COA of 8,547.00, EFC of 0, and a Total Aid of 0.00. The 'Unmet Need (Fed)' is 7,292.50 and the 'Unmet Need (Inst)' is 8,547.00. The page includes links for 'Return' and 'Monthly EFC'.

| Federal | | Institutional | |
|--------------------------------|----------|--------------------------------|-----------|
| COA: | 8,547.00 | COA: | 8,547.00 |
| EFC: | 0 0 Mo. | EFC: | 0 0.0 Mo. |
| Need: | 8,547.00 | Need: | 8,547.00 |
| Montgomery GI Bill/Americorps: | 0 | Montgomery GI Bill/Americorps: | 0 |
| Total Aid (Fed): | 1,254.50 | Total Aid (Inst): | 0.00 |
| Unmet Need (Fed): | 7,292.50 | Unmet Need (Inst): | 8,547.00 |
| Overaward (Fed): | 0.00 | Overaward (Inst): | 0.00 |

Return Monthly EFC

| Step | Action |
|------|--|
| 11. | Click the Return link.  |

Training Guide

Financial Aid



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Packaging Status Summary

Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

EFC Status: Unofficial [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Academic Career: Graduate

Aid Processing Status:

Aid Application Status: *Satisfactory Academic Progress:

Review Status: Disbursement Hold:

INST Verification Status: Loan Entrance Interview Status:

Verification Flag: Exit Interview:

Verification Status:

Scholarship Status: [Financial Aid Awarded](#) [Award Notification](#)

*Aid Packaging Method:

Packaging Plan ID:

Repackaging Plan ID:

Self Service
Award Access:
☒ Inquiry Access

Done Internet

| Step | Action |
|------|---|
| 12. | Click the ISIR Information link. ISIR Information |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

ISIR Information

Date Application Received: 08/20/2008

PELL ID: 0 CPS Process Date:

SSN: 123225959 Application Type:

Dependency Status: Correction Status:

Federal PELL Eligibility: Correction Status Date:

Citizenship Status: Native Correction Source:

DHS/INS Verification Nbr:

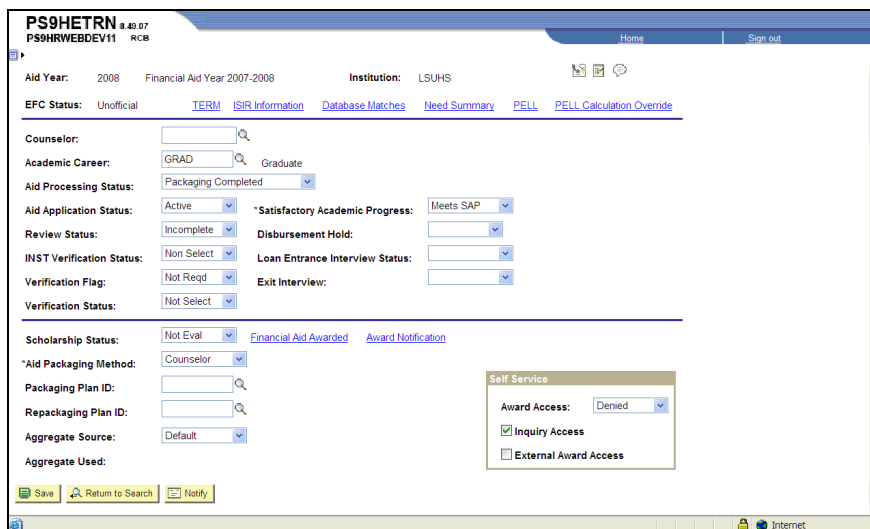
SAR C Flag:

Comment Codes: [Code](#) Reject Reasons:

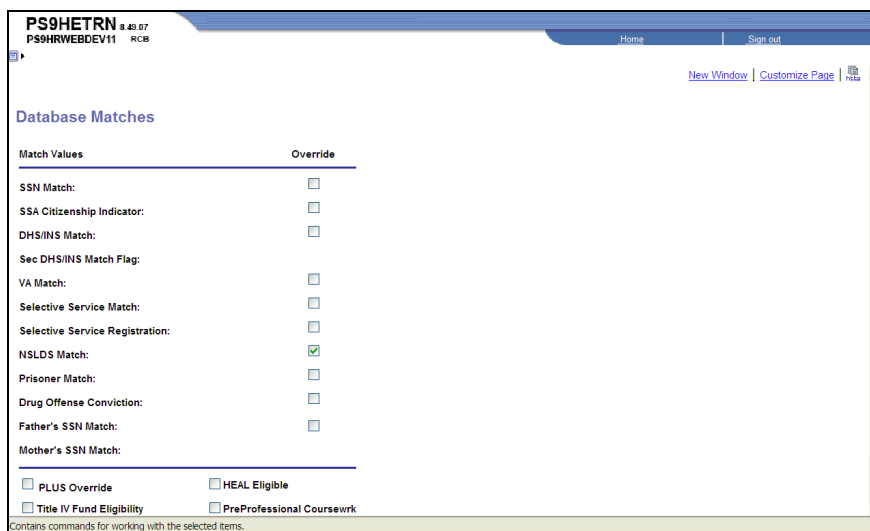
[Return](#)

Internet

| Step | Action |
|------|---|
| 13. | Click the Return link. Return |



| Step | Action |
|------|---|
| 14. | Click the Database Matches link. Database Matches |



| Step | Action |
|------|---|
| 15. | Click the Override Checkbox to override the Match Values then click the OK Button to return to the Packaging Status Summary page. |

Training Guide

Financial Aid



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Customize Page | Help

Packaging Status Summary

Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

EFC Status: Unofficial [TERM](#) [SIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Academic Career: Graduate

Aid Processing Status:

Aid Application Status: *Satisfactory Academic Progress:

Review Status: Disbursement Hold:

INST Verification Status: Loan Entrance Interview Status:

Verification Flag: Exit Interview:

Verification Status:

Scholarship Status: [Financial Aid Awarded](#) [Award Notification](#)

*Aid Packaging Method:

Packaging Plan ID:

Repackaging Plan ID:

Self Service
Award Access:
☒ Inquiry Access

Done Internet

| Step | Action |
|------|---|
| 16. | Click the Financial Aid Awarded link. Financial Aid Awarded |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Customize Page | Help

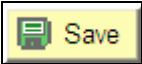
Financial Aid Award

| Item Type | Description | Offer Amount | Accept Amount | Authorized Amount | Disbursed Amount | Disb Plan | Split Code |
|--------------|--------------------------------|--------------|---------------|-------------------|------------------|-----------|------------|
| 943000000007 | Grad. Studies Fee Waivers, NO | 100.00 | 100.00 | 100.00 | 100.00 | 05 | 01 |
| 943000000043 | Grad. Studies Fee Waivers, NO2 | 100.00 | 100.00 | 100.00 | 100.00 | 07 | 01 |
| 943000000044 | Grad. Studies Fee Waivers, NO3 | 1,054.50 | 1,054.50 | 1,054.50 | 1,054.50 | 09 | 01 |

[Return](#)

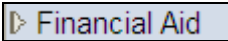
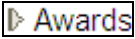


Done Internet

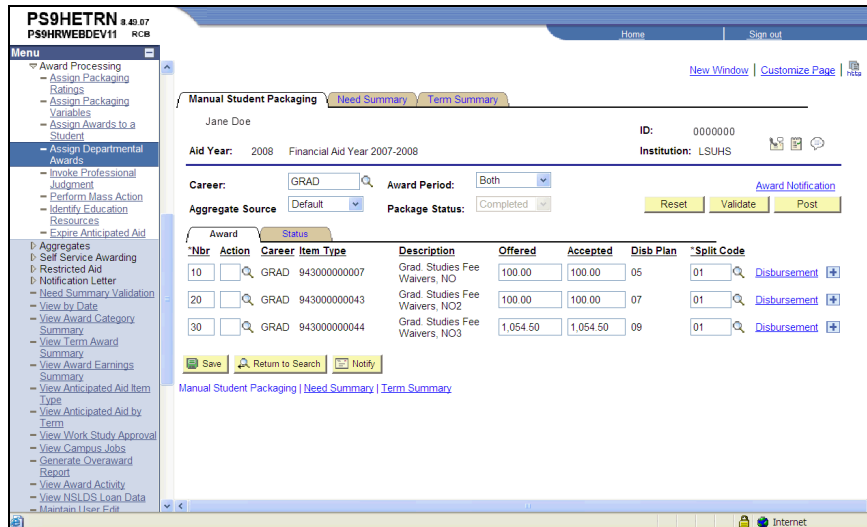
| Step | Action |
|------|--|
| 17. | Click the Return link to return to the Packaging Status Summary page. Return |

| Step | Action |
|------|---|
| 18. | Click the Save button to complete the Packaging Status Summary.  |
| 19. | This completes the topic on Packaging Status Summary. End of Procedure. |

Financial Aid Awards Procedure

In this topic you will learn how to process Financial Aid Awards.

| Step | Action |
|------|--|
| 1. | Click the Financial Aid link.  |
| 2. | Click the Awards link.  |
| 3. | Click the Award Processing link.  |
| 4. | Click the Assign Departmental Awards link.  |



PS9HETRN 4.01.07
PS9HWEBDEV11 RCB

Home Sign out

New Window Customize Page

Manual Student Packaging Need Summary Term Summary

Jane Doe ID: 0000000
Institution: LSUHS

Aid Year: 2008 Financial Aid Year 2007-2008

Career: GRAD Award Period: Both




Aggregate Source: Default Package Status: Completed


Reset Validate Post


| Award | Status |
|---|--------------|
| *Nbr Action Career Item Type Description Offered Accepted Disb Plan *Split Code | |
| 10 GRAD 943000000007 Grad. Studies Fee Waivers, NO 100.00 100.00 05 01 | Disbursement |
| 20 GRAD 9430000000043 Grad. Studies Fee Waivers, NO2 100.00 100.00 07 01 | Disbursement |
| 30 GRAD 9430000000044 Grad. Studies Fee Waivers, NO3 1,054.50 1,054.50 09 01 | Disbursement |

Save Return to Search Notify

Manual Student Packaging | Need Summary | Term Summary

| Step | Action |
|------|---|
| 5. | Click the Collapse Menu button.  |
| 6. | Click the Add a new row button to insert another row.  |
| 7. | Click the Action button.  |

| Step | Action |
|------|---|
| 8. | Click an entry in the Description column.  |

| Step | Action |
|------|---|
| 9. | Click the Item Type button.  |

Training Guide

Financial Aid



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Look Up Item Type

SetID: SHARE
Aid Year: 2008
Item Type: begins with
Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.
View All First 1-100 of 300 Last

| Item Type | Description |
|--------------|-------------------------|
| 912000000001 | WIA/ITPA-New Orleans |
| 912000000002 | ITPA-Shreveport |
| 912000000003 | LEAP Grant-New Orleans |
| 912000000004 | LEAP Grant-Shreveport |
| 912000000005 | Federal Pell Grant |
| 912000000006 | Federal SEOG |
| 912000000007 | WIA/ITPA-New Orleans #2 |
| 912000000008 | WIA/ITPA-New Orleans #3 |
| 912000000009 | ITPA-Shreveport#2 |
| 912000000010 | ITPA-Shreveport#3 |
| 912000000011 | LEAP Grant-Shreveport#2 |
| 912000000012 | LEAP Grant-Shreveport#3 |
| 912000000013 | Federal Pell Grant #2 |
| 912000000014 | Federal Pell Grant #3 |
| 912000000015 | Federal SEOG #2 |
| 912000000016 | Federal SEOG #3 |
| 912000000017 | Federal SEOG #2 |

Internet

| Step | Action |
|------|---|
| 10. | Click an entry in the Description column. <u>Federal SEOG</u> |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Manual Student Packaging

Jane Doe ID: 00000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

Career: GRAD Award Period: Both
Aggregate Source: Default Package Status: Completed

Reset Validate Post


Award Notification

| Nbr | Action | Career | Item Type | Description | Offered | Accepted | Disb Plan | Split Code |
|-----|--------------------------|--------|--------------|--------------------------------|----------|----------|-----------|-----------------|
| 10 | <input type="checkbox"/> | GRAD | 943000000007 | Grad. Studies Fee Waivers, NO | 0.00 | 0.00 | 05 | 01 Disbursement |
| 40 | <input type="checkbox"/> | GRAD | 912000000006 | Federal SEOG | 0.00 | 0.00 | | |
| 20 | <input type="checkbox"/> | GRAD | 943000000043 | Grad. Studies Fee Waivers, NO2 | 100.00 | 100.00 | 07 | 01 Disbursement |
| 30 | <input type="checkbox"/> | GRAD | 943000000044 | Grad. Studies Fee Waivers, NO3 | 1,054.50 | 1,054.50 | 09 | 01 Disbursement |

Save Return to Search Notify

Manual Student Packaging | Need Summary | Term Summary

Internet

| Step | Action |
|------|---|
| 11. | Enter the desired information into the Offered field. Enter " 100 ". |
| 12. | Enter \$100.00 into the Accepted field. |
| 13. | Click the Disb Plan button.  |

PS9HETRN 43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Look Up Disb Plan

Academic Career: GRAD

Disbursement Plan: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-7 of 7 Last

| Disbursement Plan Description |
|-------------------------------|
| 01 Fall/Spring New Orleans |
| 02 Spring/Summer New Orleans |
| 03 Three Term New Orleans |
| 05 Fall Only New Orleans |
| 07 Spring Only New Orleans |
| 09 Summer Only New Orleans |
| 10 TOPS Stipend Fall/Spring |

| Step | Action |
|------|---|
| 14. | Click an entry in the Description column. Fall/Spring New Orleans |

PS9HETRN 43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Manual Student Packaging

Jane Doe ID: 0000000 Institution: LSUHS

Aid Year: 2008 Financial Aid Year 2007-2008

Career: GRAD Award Period: Both

Aggregate Source: Default Package Status: Completed


Reset Validate Post

Award Notification

| Nbr | Action | Career | Item Type | Description | Offered | Accepted | Disb Plan | Split Code |
|-----|--------|--------|--------------|--------------------------------|----------|----------|-----------|-----------------|
| 10 | | GRAD | 943000000007 | Grad. Studies Fee Waivers, NO | 0.00 | 0.00 | 05 | 01 Disbursement |
| 40 | | GRAD | 912000000006 | Federal SEOG | 100.00 | 100.00 | 01 | Disbursement |
| 20 | | GRAD | 943000000043 | Grad. Studies Fee Waivers, NO2 | 100.00 | 100.00 | 07 | 01 Disbursement |
| 30 | | GRAD | 943000000044 | Grad. Studies Fee Waivers, NO3 | 1,054.50 | 1,054.50 | 09 | 01 Disbursement |

Save Return to Search Notify

Manual Student Packaging | Need Summary | Term Summary

| Step | Action |
|------|--|
| 15. | Click the Split Code button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Look Up Split Code

Disbursement Plan: 01

Split Code: begins with

Look Up Clear Cancel Basic Lookup

Search Results

1-2 of 2

| Split Code | Description |
|------------|-------------------|
| 01 | Equal Fall/Spring |
| 02 | Custom |

| Step | Action |
|------|--|
| 16. | Click an entry in the Description column. Equal Fall/Spring |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Manual Student Packaging

Jane Doe ID: 00000000 Institution: LSUHS

Aid Year: 2008 Financial Aid Year 2007-2008

Career: GRAD Award Period: Both

Aggregate Source: Default Package Status: Completed

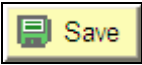
Reset Validate Post

| Nbr | Action | Career | Item Type | Description | Offered | Accepted | Disb Plan | Split Code |
|-----|--------|--------|--------------|--------------------------------|----------|----------|-----------|------------|
| 10 | | GRAD | 943000000007 | Grad. Studies Fee Waivers, NO | 0.00 | 0.00 | 05 | 01 |
| 40 | | GRAD | 912000000006 | Federal SEOG | 100.00 | 100.00 | 01 | 01 |
| 20 | | GRAD | 943000000043 | Grad. Studies Fee Waivers, NO2 | 100.00 | 100.00 | 07 | 01 |
| 30 | | GRAD | 943000000044 | Grad. Studies Fee Waivers, NO3 | 1,054.50 | 1,054.50 | 09 | 01 |

Save Return to Search Notify

Manual Student Packaging | Need Summary | Term Summary

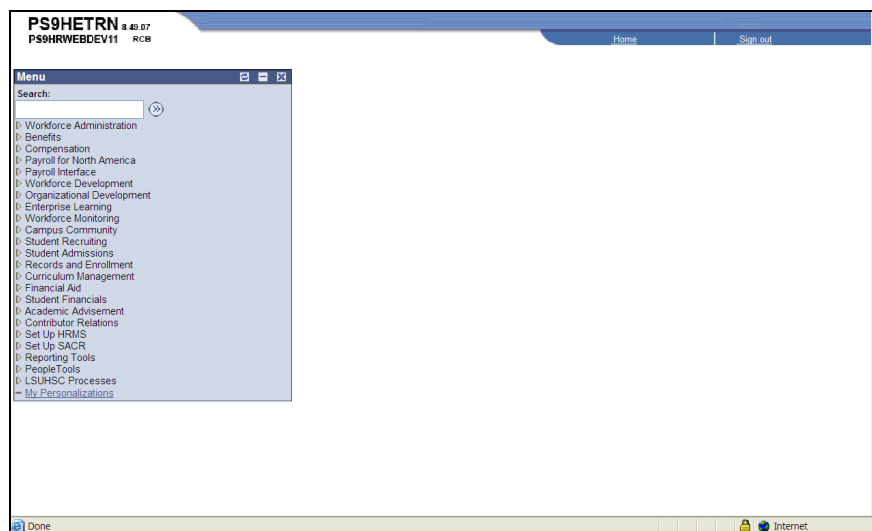
| Step | Action |
|------|--|
| 17. | Click the Validate button. Validate |
| 18. | Click the Post button. Post |

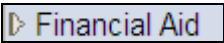
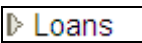

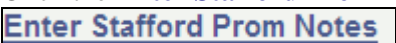
| Step | Action |
|------|--|
| 19. | Click the Save button.  |
| 20. | This completes the topic on processing Financial Aid Awards. End of Procedure. |

Loan Origination Process - Common Line Prom Note-Stafford

Procedure

In this topic you will learn the Loan Origination Process.



| Step | Action |
|------|---|
| 1. | Click the Financial Aid link.  |
| 2. | Click the Loans link.  |
| 3. | Click the Commonline Management link.  |
| 4. | Click the Enter Stafford Prom Notes link.  |

PS9HETRN 4.03.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Help](#)

Menu

- Commonline Management
 - Maintain Originated Loans
 - Validate CL 4 Loans
 - Validate CRC Loans
 - Enter Stafford Prom Notes
 - Enter PLUS Prom Notes
 - Enter ALT Loan Prom Notes
 - Maintain CL Disbursements
 - Override Loan Status
 - Maintain Student MPN Usage
 - Process Hold and Release
 - Review Hold/Release Errors
 - Loan Transmission Information
 - View CRC Loan Status Codes
 - View CRC Loan Participants
 - CRC Certification Request
 - View CL 4 Lenders
 - View CL 4 Loan Services
- Commonline Reconciliation
 - Direct Lending Management
 - DL School Account Summary
 - Direct Lending

Enter Stafford Prom Notes

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID: begins with

Academic Institution: LSUHS

Aid Year:

National ID: begins with


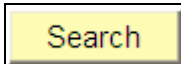
Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

| Step | Action |
|------|---|
| 5. | Enter the desired information into the ID field. Enter " 0000000 ". |
| 6. | Select an Aid Year from the drop-down. In this example 2008 was selected as the aid year.  |
| 7. | Click the Search button.  |

PS9HETRN 4.03.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Menu

- Commonline Management
 - Maintain Originated Loans
 - Validate CL 4 Loans
 - Validate CRC Loans
 - Enter Stafford Prom Notes
 - Enter PLUS Prom Notes
 - Enter ALT Loan Prom Notes
 - Maintain CL Disbursements
 - Override Loan Status
 - Maintain Student MPN Usage
 - Process Hold and Release
 - Review Hold/Release Errors
 - Loan Transmission Information
 - View CRC Loan Status Codes
 - View CRC Loan Participants
 - CRC Certification Request
 - View CL 4 Lenders
 - View CL 4 Loan Services
- Commonline Reconciliation
 - Direct Lending Management
 - DL School Account Summary
 - Direct Lending

CommonLine PNote - Stafford

Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year: 2007-2008 Institution: LSUHS

[Find](#) | [View All](#) | First 1 of 1 [Last](#)

*Loan Type Code: ST1 FFELP Stafford Combo 1 Application Number: 1




Lender OPEID: 529030 Capital One(formerly Hibernia) Lender Branch ID:

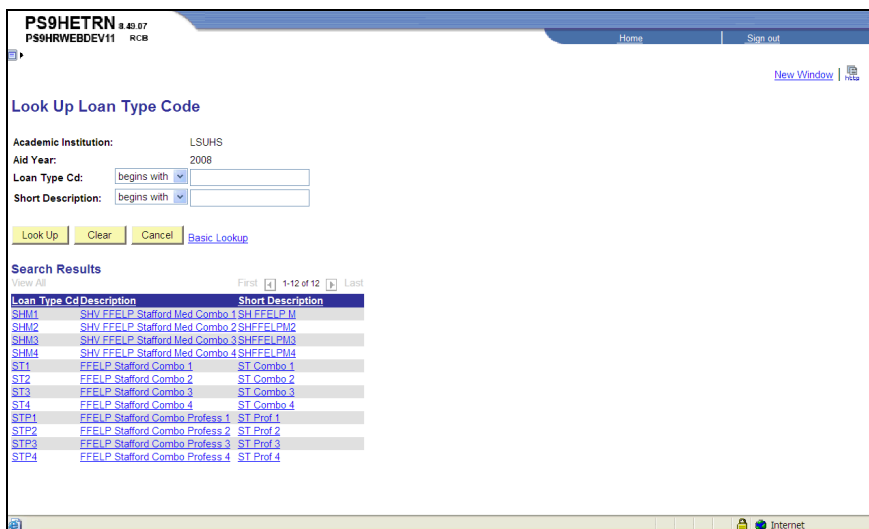
Guarantor OPEID: 800 United Student Aid Funds Inc. [Student Data](#)

Capitalize Interest:

References Complete: ☒ Borrower Signature [PNote Status](#)

Signature Date: 08/11/2008

| Step | Action |
|------|--|
| 8. | Click the Collapse Menu button.  |
| 9. | Previous Stafford Prom Note information exist for this student, therefore you will add a new row to input the current Stafford Prom Note information. Click the Add a new row button to insert a row. Note: After the row is added the row count is change to 2 of 2.  |
| 10. | Click the Look up Loan Type Code button.  |



PS9HETRN 4.43.07
PS9HREBDEV11 RCB

Home Sign out

[New Window](#)

Look Up Loan Type Code

Academic Institution: LSUHS

Aid Year: 2008

Loan Type Cd: begins with

Short Description: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1-12 of 12 Last

| Loan Type Cd | Description | Short Description |
|--------------|--------------------------------|-------------------|
| SHM1 | SHV FFELP Stafford Med Combo 1 | SH FFELP M |
| SHM2 | SHV FFELP Stafford Med Combo 2 | SH FFELP M2 |
| SHM3 | SHV FFELP Stafford Med Combo 3 | SH FFELP M3 |
| SHM4 | SHV FFELP Stafford Med Combo 4 | SH FFELP M4 |
| ST1 | FFELP Stafford Combo 1 | ST Combo 1 |
| ST2 | FFELP Stafford Combo 2 | ST Combo 2 |
| ST3 | FFELP Stafford Combo 3 | ST Combo 3 |
| ST4 | FFELP Stafford Combo 4 | ST Combo 4 |
| STP1 | FFELP Stafford Combo Profess 1 | ST Prof 1 |
| STP2 | FFELP Stafford Combo Profess 2 | ST Prof 2 |
| STP3 | FFELP Stafford Combo Profess 3 | ST Prof 3 |
| STP4 | FFELP Stafford Combo Profess 4 | ST Prof 4 |

| Step | Action |
|------|---|
| 11. | Select a Loan Type Code from the drop-down list. <u>ST Combo 1</u> |

Training Guide

Financial Aid



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Customize Page | Help

CommonLine PNote - Stafford


Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

Find | View All First 2 of 2 Last

*Loan Type Code: ST1 FFELP Stafford Combo 1 Application Number: 2
Lender OPEID: Lender Branch ID:
Guarantor OPEID: Student Data
Capitalize Interest PNote Status
References Complete: Borrower Signature Signature Date:

Save Return to Search Notify

Done Internet

| Step | Action |
|------|--|
| 12. | Click the Look up Lender OPEID button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Help

Look Up Lender OPEID

OPEID: begins with
Branch ID: begins with
Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-50 of 60 Last

| OPEID | Branch ID | Description |
|-------------|-----------|---------------------------------|
| 302218 0000 | | DENTAL Loans |
| 522583 0000 | | Sallie Mae Medical School Loan |
| 529030 0000 | | Capital One (formerly Hibernia) |
| 333810 0000 | | Mediana Classic Carnegie |
| 805148 0000 | | Whitney Conversion |
| 806827 0000 | | BancorpSouth Bank |
| 833820 0000 | | Netnet Conversion |
| 707176 0000 | | S-Wells Fargo Conversion |
| 800097 0000 | | Regions |
| 802218 0000 | | Sallie Mae |
| 805076 0000 | | Whitney Natl. Bank |
| 805113 0000 | | LELA |
| 805126 0000 | | JEFF DAVIS BANK & TRUST CO |
| 805148 0000 | | Whitney Natl. Bank |
| 805149 0000 | | LELA |
| 805156 0000 | | Chase (formerly Bank One) |
| 806827 0000 | | S-BANCORP SOUTH |

Done Internet

| Step | Action |
|------|--|
| 13. | Click an entry in the Lender OPEID drop-down. <u>Whitney Natl. Bank</u> |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page Help

CommonLine PNote - Stafford


Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

Find View All First 2 of 2 Last

*Loan Type Code: ST1 FFELP Stafford Combo 1 Application Number: 2
Lender OPEID: B05076 Whitney Natl. Bank Lender Branch ID:
Guarantor OPEID:
Capitalize Interest
References Complete: Borrower Signature Signature Date:

Save Return to Search Notify

Done Internet

| Step | Action |
|------|--|
| 14. | Click the Look up Lender Branch ID button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Help

Look Up Lender Branch ID

Lender OPEID: 805076
Lender Branch ID: begins with
Description: begins with
Short Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results
View All First 1 of 1 Last

| Lender Branch ID | Description | Short Description |
|------------------|--------------------|-------------------|
| 0000 | Whitney Natl. Bank | Whitney Na |

Done Internet

| Step | Action |
|------|---|
| 15. | Select a Lender Branch from the drop-down. <u>Whitney Na</u> |

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Customize Page | Help

CommonLine PNote - Stafford


Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

Find | View All First 2 of 2 Last

*Loan Type Code: ST1 FFELP Stafford Combo 1 Application Number: 2
Lender OPEID: 805076 Whitney Natl. Bank Lender Branch ID: 0000
Guarantor OPEID: Capitalize Interest: Student Data
References Complete: PNote Status
☐ Borrower Signature Signature Date:

Save Return to Search Notify

Done Internet

| Step | Action |
|------|---|
| 16. | Click the Look up Guarantor OPEID button.  |

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Help

Look Up Guarantor OPEID

OPEID: Branch ID: begins with Description: begins with
Look Up Clear Cancel Basic Lookup

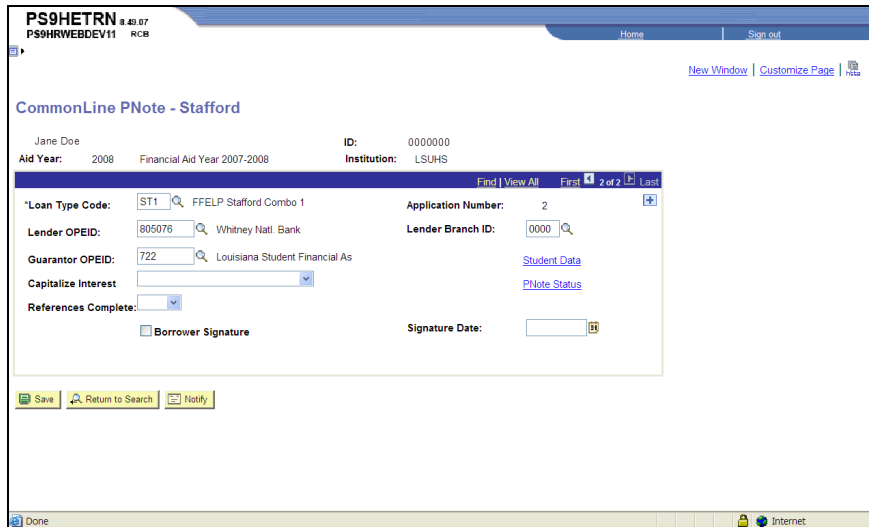
Search Results

View All First 1-5 of 5 Last

| OPEID | Branch ID | Description |
|-------|-----------|--------------------------------|
| 721 | 0000 | S-Kentucky Higher Education As |
| 722 | 0000 | Louisiana Student Financial As |
| 747 | 0000 | S-Tennessee Student Assistance |
| 755 | 0000 | Great Lakes Higher Education G |
| 800 | 0000 | United Student Aid Funds Inc. |

Done Internet

| Step | Action |
|------|--|
| 17. | Select an entry in the Look Up Guarantor OPEID drop-down. <u>Louisiana Student Financial As</u> |



PS9HETRN 43.07
PS9HRWEBDEV11 RCB

Home | Sign out

New Window | Customize Page | Help

CommonLine PNote - Stafford


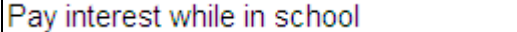

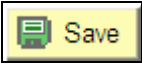
Jane Doe ID: 0000000
Aid Year: 2008 Financial Aid Year 2007-2008 Institution: LSUHS

Find | View All | First 2 of 2 | Last

*Loan Type Code: ST1 FFELP Stafford Combo 1 Application Number: 2
Lender OPEID: 805076 Whitney Natl. Bank Lender Branch ID: 0000
Guarantor OPEID: 722 Louisiana Student Financial As
Capitalize Interest
References Complete: Borrower Signature
Signature Date:

Save Return to Search Notify

Done Internet

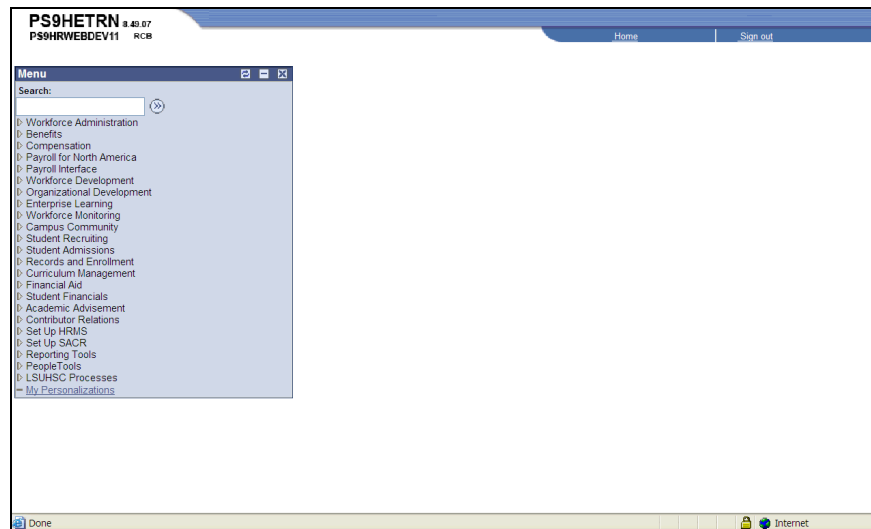
| Step | Action |
|------|---|
| 18. | Click the Capitalize Interest drop-down and select from the list.  |
| 19. | Click the Pay interest while in school list item.  |
| 20. | Select an option from the References Complete drop-down. In this example, No was selected.  |
| 21. | Click the Save button to save the Loan Origination Process data.  |
| 22. | This completes the Loan Origination Process topic. End of Procedure. |

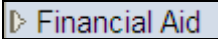
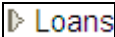

Loan Origination Process - Run Control Procedure

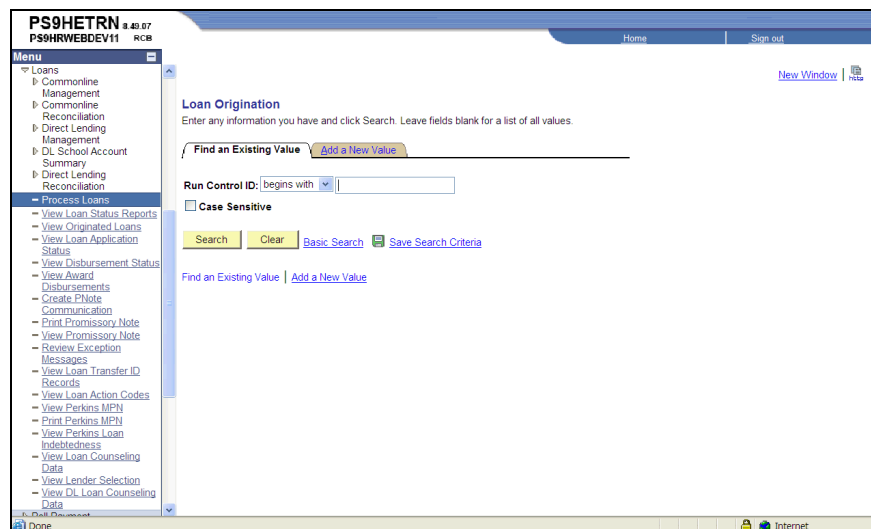
In this topic you will learn the Loan Origination process.


Training Guide

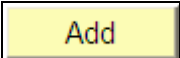
Financial Aid

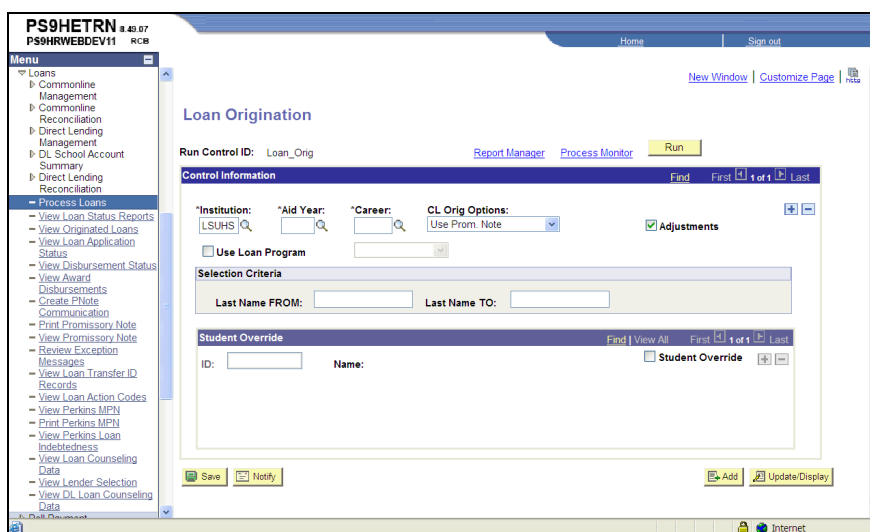




| Step | Action |
|------|---|
| 1. | Click the Financial Aid link.  |
| 2. | Click the Loans link.  |
| 3. | Click the Process Loans link.  |



| Step | Action |
|------|--|
| 4. | Click the Add a New Value tab.  |

| Step | Action |
|------|---|
| 5. | <p>A Run Control ID is used as a means to access the Process Scheduler. The first time you use this method, you will need to create a run control.</p> <p>To create a new Run Control ID, click the Add a New Value tab. To use an existing Run Control ID, click the Find an Existing Value.</p> <p>Run Control Specifications:</p> <ol style="list-style-type: none"> 1. Specific to the end-user's ID 2. Can be entered in upper or lower case 3. Can be up to 30 characters 4. Character can include numbers, letter, <u>but no special characters</u> 5. Cannot contain blanks, to link words use the underscore. <p>Enter the desired information into the Run Control ID field. Enter "Loan_Orig".</p> |
| 6. | <p>Click the Add button.</p>  |



| Step | Action |
|------|--|
| 7. | <p>Click the Collapse Menu button.</p>  |
| 8. | <p>Click the Look up Aid Year button.</p>  |

Training Guide

Financial Aid



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Look Up Aid Year

Academic Institution: LSUHS

Aid Year: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-9 of 9 Last

| Aid Year | Description |
|----------|------------------------------|
| 2009 | Financial Aid Year 2008-2009 |
| 2008 | Financial Aid Year 2007-2008 |
| 2007 | Financial Aid Year 2006-2007 |
| 2006 | Financial Aid Year 2005-2006 |
| 2005 | Financial Aid Year 2004-2005 |
| 2004 | Financial Aid Year 2003-2004 |
| 2003 | Financial Aid Year 2002-2003 |
| 2002 | Financial Aid Year 2001-2002 |
| 2001 | Financial Aid Year 2000-2001 |

Done Internet

| Step | Action |
|------|--|
| 9. | Select the Aid Year from the drop-down list. Financial Aid Year 2007-2008 |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Loan Origination

Run Control ID: Loan_Orig Report Manager Process Monitor Run

Control Information

Find First 1 of 1 Last

*Institution: LSUHS *Aid Year: 2008 *Career: CL Orig Options: Use Prom. Note Adjustments

Use Loan Program

Selection Criteria

Last Name FROM: Last Name TO:


Student Override

Find View All First 1 of 1 Last

ID: Name: Student Override

Save Notify Add Update/Display

Done Internet

| Step | Action |
|------|--|
| 10. | Click the Look up Career button.  |

Look Up Career

Academic Institution: LSUHS

Academic Career: Allied Health, Graduate

Description: begins with

Short Description: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1-11 of 11 Last

| Academic Career Description | Short Description |
|-----------------------------|------------------------------|
| AHP Grad | Allied Health, Graduate |
| AHP Ugrad | Allied Health, Undergraduate |
| Dentistry | Dentistry |
| Dent Grad | Dentistry, Graduate |
| Dent Ugrad | Dentistry, Undergraduate |
| Graduate | Graduate |
| Med N Q | Medicine, New Orleans |
| Nurs Anest | Nursing, Anesthesia |
| Nurs Grad | Nursing, Graduate |
| Nurs Ugrad | Nursing, Undergraduate |
| Public Hth | Public Health |

| Step | Action |
|------|---|
| 11. | Select the Academic Career Description from the drop-down list. <u>Allied Health, Graduate</u> |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

[Home](#) [Sign out](#)

[New Window](#) [Customize Page](#)

Loan Origination

Run Control ID: Loan_Orig [Report Manager](#) [Process Monitor](#) [Run](#)

Control Information Find First 1 of 1 Last

*Institution: LSUHS *Aid Year: 2008 *Career: AHPG CL Orig Options: Use Prom. Note ☒ Adjustments

☐ Use Loan Program

Selection Criteria

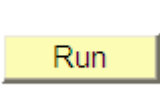
Last Name FROM: Last Name TO:

Student Override Find View All First 1 of 1 Last

ID: Name: ☐ Student Override

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Done

| Step | Action |
|------|---|
| 12. | Click the Run button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Process Scheduler Request



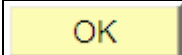
User ID: CHAROL Run Control ID: Loan_Orig

Server Name: Run Date: 08/20/2008
 Recurrence: Run Time: 3:59:58PM
 Time Zone:

Process List

| Select | Description | Process Name | Process Type | *Type | *Format | Distribution |
|-------------------------------------|------------------|--------------|--------------|--------|---------|------------------------------|
| <input checked="" type="checkbox"/> | Loan Origination | FAPLBOG1 | COBOL SQL | (None) | (None) | Distribution |

Done

| Step | Action |
|------|---|
| 13. | Select the Server Name from the drop-down list.  |
| 14. | Click the PSNT list item.  |
| 15. | Click the OK button.  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Loan Origination

Run Control ID: Loan_Orig [Report Manager](#) [Process Monitor](#)

Control Information Find First 1 of 1 Last
 Process Instance: 743988

*Institution: LSUHS *Aid Year: 2008 *Career: AHPG CL Orig Options: Use Prom. Note ☒ Adjustments
☐ Use Loan Program

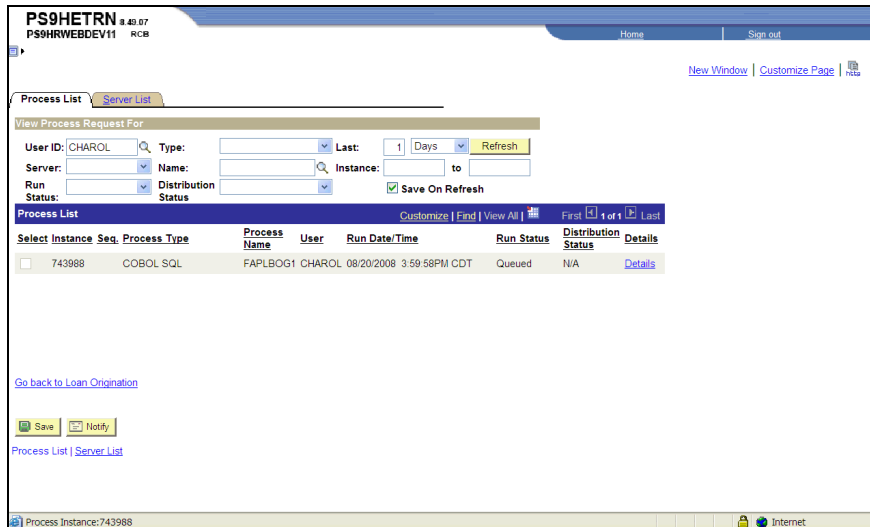
Selection Criteria

Last Name FROM: Last Name TO:

Student Override Find View All First 1 of 1 Last
☐ Student Override

Process Instance: 743988

| Step | Action |
|------|--|
| 16. | Click the Process Monitor link to view the status of the process Process Monitor |



| Step | Action |
|------|---|
| 17. | Click the Refresh button until the: Run Status is Success and Distribution Status is Posted Refresh |
| 18. | Click the Go back to Loan Origination link. Go back to Loan Origination |
| 19. | This completes the topic on running the Load Origination Process End of Procedure. |

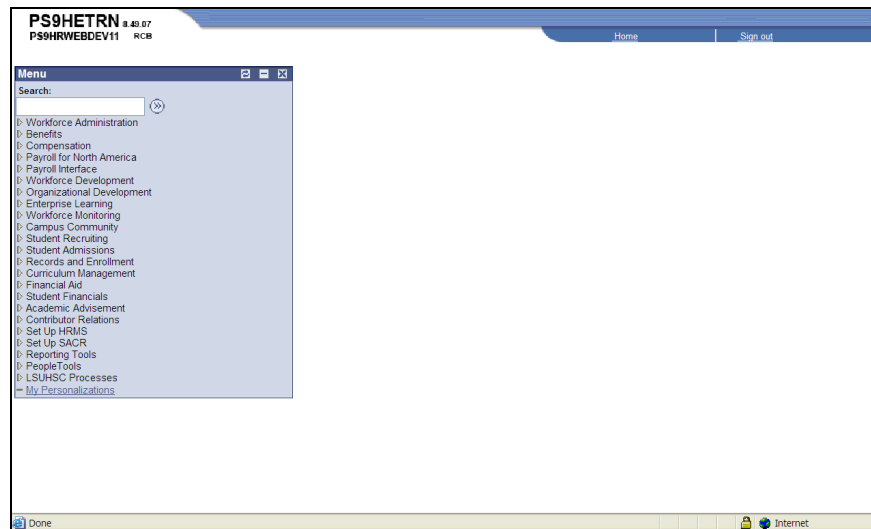
View Customer Accounts

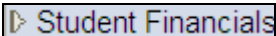

Procedure

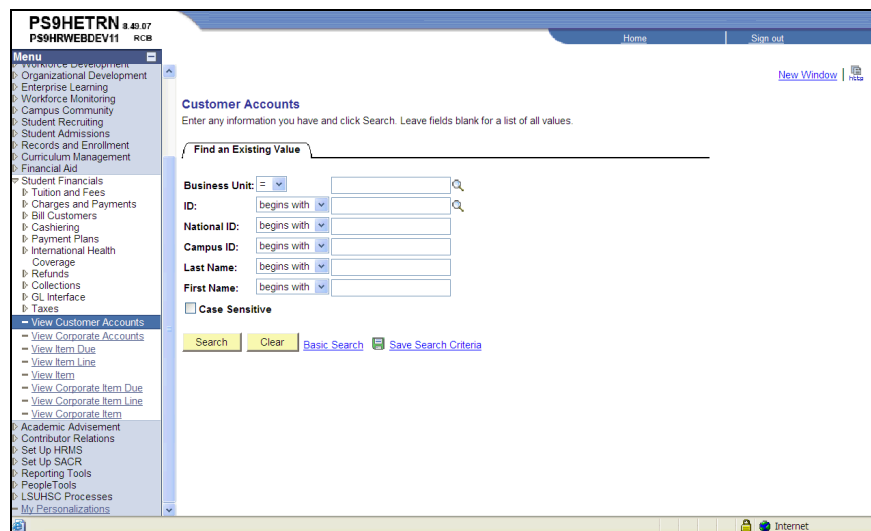
In this topic you will learn how to View Customer Accounts.


Training Guide

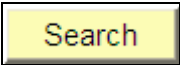
Financial Aid

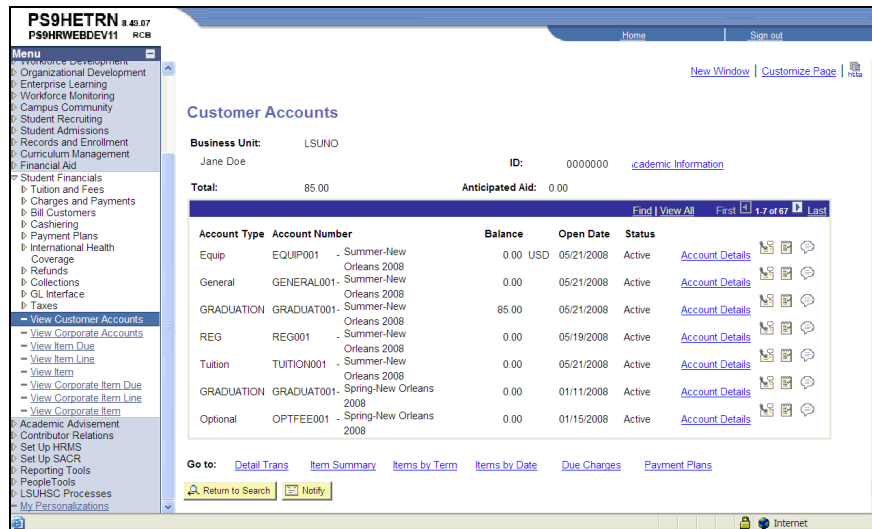


| Step | Action |
|------|---|
| 1. | Click the Student Financials link.  |
| 2. | Click the View Customer Accounts link.  |



| Step | Action |
|------|---|
| 3. | Click the Look up Business Unit button.  |
| 4. | Select a Business Unit from the drop-down. |

| Step | Action |
|------|---|
| 5. | Enter a Student ID in the <u>ID field</u> then Click the Search button.  |



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Customer Accounts


Business Unit: LSUNO
Jane Doe ID: 0000000 [Academic Information](#)

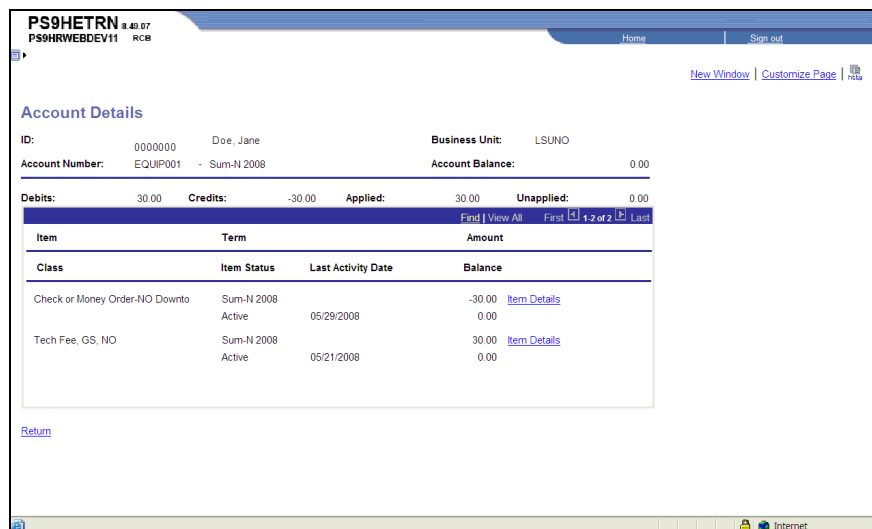
Total: 85.00 Anticipated Aid: 0.00

| Account Type | Account Number | Balance | Open Date | Status | |
|--------------|--------------------------------------|----------|------------|--------|---------------------------------|
| Equip | EQUIP001 - Summer-New Orleans 2008 | 0.00 USD | 05/21/2008 | Active | Account Details |
| General | GENERAL001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details |
| GRADUATION | GRADUAT001 - Summer-New Orleans 2008 | 85.00 | 05/21/2008 | Active | Account Details |
| REG | REG001 - Summer-New Orleans 2008 | 0.00 | 05/19/2008 | Active | Account Details |
| Tuition | TUITION001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details |
| GRADUATION | GRADUAT001 - Spring-New Orleans 2008 | 0.00 | 01/11/2008 | Active | Account Details |
| Optional | OPTFEE001 - Spring-New Orleans 2008 | 0.00 | 01/15/2008 | Active | Account Details |

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

[Return to Search](#) [Notify](#)

| Step | Action |
|------|---|
| 6. | Click the Collapse Menu button.  |
| 7. | Click the Account Details link Account Details |



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Account Details

ID: 0000000 Doe, Jane Business Unit: LSUNO

Account Number: EQUIP001 - Sum-N 2008 Account Balance: 0.00

Debits: 30.00 Credits: -30.00 Applied: 30.00 Unapplied: 0.00

| Item | Term | Amount | |
|--------------------------------|-------------|--------------------|-------------------------------------|
| Class | Item Status | Last Activity Date | Balance |
| Check or Money Order-NO Downto | Sum-N 2008 | | -30.00 Item Details |
| | Active | 05/29/2008 | 0.00 |
| Tech Fee, GS, NO | Sum-N 2008 | | 30.00 Item Details |
| | Active | 05/21/2008 | 0.00 |

[Return](#)

| Step | Action |
|------|---|
| 8. | Click the Item Details link. Item Details |

PS9HETRN 4.40.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Customer Accounts

Business Unit: LSUNO
Doe, Jane ID: 0000000 Academic Information

Total: 85.00 Anticipated Aid: 0.00

| Account Type | Account Number | Balance | Open Date | Status | |
|--------------|--------------------------------------|----------|------------|--------|---------------------------------|
| Equip | EQUIP001 - Summer-New Orleans 2008 | 0.00 USD | 05/21/2008 | Active | Account Details |
| General | GENERAL001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details |
| GRADUATION | GRADUAT001 - Summer-New Orleans 2008 | 85.00 | 05/21/2008 | Active | Account Details |
| REG | REG001 - Summer-New Orleans 2008 | 0.00 | 05/19/2008 | Active | Account Details |
| Tuition | TUITION001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details |
| GRADUATION | GRADUAT001 - Spring-New Orleans 2008 | 0.00 | 01/11/2008 | Active | Account Details |
| Optional | OPTFEE001 - Spring-New Orleans 2008 | 0.00 | 01/15/2008 | Active | Account Details |

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

[Return to Search](#) [Notify](#)

Done Internet

| Step | Action |
|------|---|
| 9. | Click the Academic Information link. Academic Information |

PS9HETRN 4.40.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Customer Accounts

Academic Information

Bio/Demo Data

ID: 0000000 Name: Doe, Jane
Gender: Female

| Citizenship | National ID |
|--|-----------------------|
| Country: United States Description: Native | NID Type: National ID |

Return


| Term | Career Prim Prog | Residency Group | Units Tot | Units Level | Acad Load | |
|----------|------------------------|-----------------|-----------|-------------|--------------------|--|
| Sum 2008 | GRAD BioMB-NP In-State | GS | 6.000 | 111.000 | Graduate Full-Time | Academic Plan Enrollment |
| Spr 2008 | GRAD BioMB-NP In-State | GS | 0.000 | 105.000 | Graduate Full-Time | Academic Plan Enrollment |
| Fal 2007 | GRAD BioMB-NP In-State | GS | 0.000 | 105.000 | Graduate Full-Time | Academic Plan Enrollment |
| Sum 2007 | GRAD BioMB-NP In-State | GS | 0.000 | 105.000 | Graduate Less 1/2 | Academic Plan Enrollment |

Return Internet

| Step | Action |
|------|---|
| 10. | Click the Academic Plan link. Academic Plan |

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | 

Academic Information

Academic Plan

ID: 0000000 Career: GRAD

Find | First | 1 of 1 | Last

| Acad Plan | Declare Date | Req Term | Completion Term |
|-----------------------------|--------------|-----------------------|-----------------|
| Biochem & Molecular Bio, NP | 08/01/2001 | Fall-New Orleans 2001 | |

Find | View All | First | 1 of 1 | Last


| Academic Sub-Plan | Requirement Term | Declare Date |
|-------------------|------------------|--------------|
|-------------------|------------------|--------------|

[Return](#)

| Step | Action |
|------|---|
| 11. | Click the Return link. Return |

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | 

Customer Accounts

Academic Information

Bio/Demo Data

ID: 0000000 Name: Doe, Jane
Gender: Female

| Citizenship | Find View All First 1 of 1 Last | National ID | Find View All First 1 of 1 Last |
|---------------|---|-------------|---|
| Country | Description | NID Type | National ID |
| United States | Native | | |

Career Term Data Find | View All | First | 1 of 21 | Last

| Term | Career | Prim Prog | Residency Group | Units Tot | Units Level | Acad Load | |
|----------|--------|-------------|-----------------|-----------|-------------|-----------|---|
| Sum 2008 | GRAD | Biochem-Bio | In-State | GS | 6.000 | 111.000 | Graduate Full-Time Academic Plan Enrollment |
| Spr 2008 | GRAD | Biochem-Bio | In-State | GS | 0.000 | 105.000 | Graduate Full-Time Academic Plan Enrollment |
| Fal 2007 | GRAD | Biochem-Bio | In-State | GS | 0.000 | 105.000 | Graduate Full-Time Academic Plan Enrollment |
| Sum 2007 | GRAD | Biochem-Bio | In-State | GS | 0.000 | 105.000 | Graduate Less 1/2 Academic Plan Enrollment |

[Return](#)

| Step | Action |
|------|---|
| 12. | Click the Enrollment link. Enrollment |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Academic Information

Enrollment Summary

ID: 0000000 Name: Doe, Jane

| Class # | Subject | Catalog Component | Session Census Date | Section | Status | Reason | Basis | Prog Units | Add Date |
|---------|----------------------------------|-------------------|---------------------|---------|----------|----------|--------|------------|------------|
| 1041 | Class Info BIOCH | 400 | Semester 1 | GRAD | Enrolled | Enrolled | Graded | 6.00 | 05/19/2008 |
| | DISSERTATION RESEARCH | Dissertatn | 08/15/2008 | | | | | 6.00 | |

[Return](#)

| Step | Action |
|------|---|
| 13. | Click the Class Info link. Class Info |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Enrollment Summary

Class Meeting / Instructor

| Class Nbr | Subject | Catalog | Session | Section |
|-----------|---------|---------|-----------------------|-----------------|
| 1041 | BIOCH | 400 | DISSERTATION RESEARCH | Semester 1 GRAD |

| Pat Nbr | Building/Room | Start Time | End Time | M | T | W | T | F | S | S |
|---------|---------------|------------|----------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Instructor Name Harold, Carmen

[Return](#)

| Step | Action |
|------|---|
| 14. | Click the Return link. Return |
| 15. | Click the Item Summary link. Item Summary |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

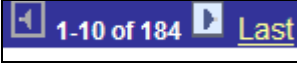
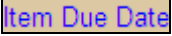

Item Summary

Business Unit: LSUNO
ID: 0000000 Doe, Jane

Customize Find View 100 First 1-10 of 184 Last

| Item Description | Item Due Date | Item Type | Term | Account Number | Account Term | Item Amt | Balance |
|-------------------------------|-------------------------|------------|-------------------------|----------------|--------------|----------|---------|
| Acad. Excel. Fee- Grad Stu NO | Spring-New Orleans 2007 | GENERAL001 | Spring-New Orleans 2007 | | | 90.00 | 90.00 |
| Acad. Excel. Fee- Grad Stu NO | Fall-New Orleans 2004 | GENERAL001 | Fall-New Orleans 2004 | | | 0.00 | 0.00 |
| Acad. Excel. Fee- Grad Stu NO | Summer-New Orleans 2006 | GENERAL001 | Summer-New Orleans 2006 | | | 60.00 | 0.00 |
| Acad. Excel. Fee- Grad Stu NO | Spring-New Orleans 2006 | GENERAL001 | Spring-New Orleans 2006 | | | 90.00 | 0.00 |
| Acad. Excel. Fee- Grad Stu NO | Spring-New Orleans 2007 | GENERAL001 | Spring-New Orleans 2007 | | | -90.00 | -90.00 |
| Acad. Excel. Fee- Grad Stu NO | Fall-New Orleans 2005 | GENERAL001 | Fall-New Orleans 2005 | | | 90.00 | 0.00 |
| Acad. Excel. Fee- Grad Stu NO | Summer-New Orleans 2005 | GENERAL001 | Summer-New Orleans 2005 | | | 60.00 | 0.00 |
| Acad. Excel. Fee- Grad Stu NO | Summer-New Orleans 2008 | GENERAL001 | Summer-New Orleans 2008 | | | 60.00 | 0.00 |
| Acad. Excel. Fee- Grad Stu NO | Spring-New Orleans 2005 | GENERAL001 | Spring-New Orleans 2005 | | | 90.00 | 0.00 |
| Acad. Excel. Fee- Grad Stu NO | Fall-New Orleans 2006 | GENERAL001 | Fall-New Orleans 2006 | | | 90.00 | 0.00 |

Done Internet

| Step | Action |
|------|--|
| 16. | <p>Note: The system displayed 1-10 of 184 Records. Use the left and right arrows to view next and previous records. Click the First and Last links to display the first page of records or the last page of records.</p> <p>For this exercise click the Last link</p>  |
| 17. | <p>Click the Item Due Date tab.</p>  |
| 18. | <p>Click the Return link.</p>  |

PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Customer Accounts

Business Unit: LSUNO
Doe, Jane
ID: 0000000 Academic Information

Total: 85.00 Anticipated Aid: 0.00

Find View All First 1-7 of 67 Last

| Account Type | Account Number | Balance | Open Date | Status |
|--------------|--------------------------------------|----------|------------|--------|
| Equip | EQUIP001 - Summer-New Orleans 2008 | 0.00 USD | 05/21/2008 | Active |
| General | GENERAL001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active |
| GRADUATION | GRADUAT001 - Summer-New Orleans 2008 | 85.00 | 05/21/2008 | Active |
| REG | REG001 - Summer-New Orleans 2008 | 0.00 | 05/19/2008 | Active |
| Tuition | TUITION001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active |
| GRADUATION | GRADUAT001 - Spring-New Orleans 2008 | 0.00 | 01/11/2008 | Active |
| Optional | OPTFEE001 - Spring-New Orleans 2008 | 0.00 | 01/15/2008 | Active |

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

[Return to Search](#) [Notify](#)

Internet

| Step | Action |
|------|---|
| 19. | Click the Items by Term link. Items by Term |

PS9HETRN 43.67
PS9HRWEBDEV11 RCB

Home Sign out

| | | | | |
|--------------------------------|------------|------------|-----------|-----------|
| Check or Money Order-NO Downto | 04/25/2004 | 08/14/2002 | -130.00 | 0.00 |
| Check or Money Order-NO Downto | 04/25/2004 | 08/14/2002 | -53.00 | 0.00 |
| Check or Money Order-NO Downto | 04/25/2004 | 01/08/2003 | 45.00 | 0.00 |
| Check or Money Order-NO Downto | 04/25/2004 | 01/08/2003 | 130.00 | 0.00 |
| Check or Money Order-NO Downto | 04/25/2004 | 01/08/2003 | 8.00 | 0.00 |
| Check or Money Order-NO Downto | 04/29/2004 | 08/14/2002 | 0.00 | 0.00 |
| Check or Money Order-NO Downto | 04/29/2004 | 08/14/2002 | 0.00 | 0.00 |
| Gen Activity Fee, GS, NO | 08/14/2002 | 08/14/2002 | 18.50 | 18.50 |
| Gen Activity Fee, GS, NO | 04/29/2004 | 04/29/2004 | -18.50 | -18.50 |
| Gen Activity Fee, GS, NO | 04/29/2004 | 04/29/2004 | 18.50 | 0.00 |
| Grad. Studies Fee Waivers, NO | 08/22/2002 | 08/22/2002 | -1,170.00 | 0.00 |
| Health Insurance-New Orleans | 08/14/2002 | 08/14/2002 | 0.00 | 0.00 |
| Stick Fee, New Orleans | 08/14/2002 | 08/14/2002 | 8.00 | 0.00 |
| Student Health, NO | 08/14/2002 | 08/14/2002 | 60.00 | 60.00 |
| Student Health, NO | 04/29/2004 | 04/29/2004 | -60.00 | -60.00 |
| Student Health, NO | 04/29/2004 | 04/29/2004 | 60.00 | 0.00 |
| Student Housing Fee, NO | 08/14/2002 | 08/14/2002 | 51.50 | 51.50 |
| Student Housing Fee, NO | 04/29/2004 | 04/29/2004 | -51.50 | -51.50 |
| Student Housing Fee, NO | 04/29/2004 | 04/29/2004 | 51.50 | 0.00 |
| Tech Fee, GS, NO | 08/14/2002 | 08/14/2002 | 45.00 | 45.00 |
| Tech Fee, GS, NO | 04/29/2004 | 04/29/2004 | -45.00 | -45.00 |
| Tech Fee, GS, NO | 04/29/2004 | 04/29/2004 | 45.00 | 0.00 |
| UF, GS, New Orleans | 08/14/2002 | 08/14/2002 | 1,170.00 | 1,170.00 |
| UF, GS, New Orleans | 04/29/2004 | 04/29/2004 | -1,170.00 | -1,170.00 |
| UF, GS, New Orleans | 04/29/2004 | 04/29/2004 | 1,170.00 | 0.00 |

[Return](#)

| Step | Action |
|------|---|
| 20. | Click the Return link. Return |

PS9HETRN 43.67
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#) [Customize Page](#) [Help](#)

Customer Accounts

Business Unit: LSUNO
Doe, Jane ID: 00000000 [Academic Information](#)

Total: 85.00 Anticipated Aid: 0.00

| Account Type | Account Number | Balance | Open Date | Status | |
|--------------|--------------------------------------|----------|------------|--------|---------------------------------|
| Equip | EQUIP001 - Summer-New Orleans 2008 | 0.00 USD | 05/21/2008 | Active | Account Details |
| General | GENERAL001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details |
| GRADUATION | GRADUAT001 - Summer-New Orleans 2008 | 85.00 | 05/21/2008 | Active | Account Details |
| REG | REG001 - Summer-New Orleans 2008 | 0.00 | 05/19/2008 | Active | Account Details |
| Tuition | TUITION001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details |
| GRADUATION | GRADUAT001 - Spring-New Orleans 2008 | 0.00 | 01/11/2008 | Active | Account Details |
| Optional | OPTFEE001 - Spring-New Orleans 2008 | 0.00 | 01/15/2008 | Active | Account Details |


Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

[Return to Search](#) [Notify](#)

| Step | Action |
|------|---|
| 21. | Click the Due Charges link. Due Charges |

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | 

Due Charges

Business Unit: LSUNO
ID: 0000000 Doe, Jane

By Due Date Find | View All First 1 of 1 Last

| Due Date | Due Amount | Total Due |
|------------|------------|-----------|
| 05/20/2008 | 85.00 | 85.00 |

By Item Find | View All First 1 of 2 Last

| Item Type | Item Term | Account Nbr | Account Term | Due Date | Due Amt | Total Due |
|----------------------|------------|-------------|--------------|------------|---------|-----------|
| Diploma Fees, GS, NO | Sum-N 2008 | GRADUAT001 | Sum-N 2008 | 05/20/2008 | 25.00 | 25.00 |
| Thesis Fees, GS, NO | Sum-N 2008 | GRADUAT001 | Sum-N 2008 | 05/20/2008 | 60.00 | 85.00 |


[Return](#)

Done | Internet

| Step | Action |
|------|---|
| 22. | Click the Return link. Return |

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out














[New Window](#) | [Customize Page](#) | 

Customer Accounts

Business Unit: LSUNO
Doe, Jane ID: 0000000 Academic Information

Total: 85.00 Anticipated Aid: 0.00

Account Type Account Number Balance Open Date Status Find | View All First 1 of 67 Last

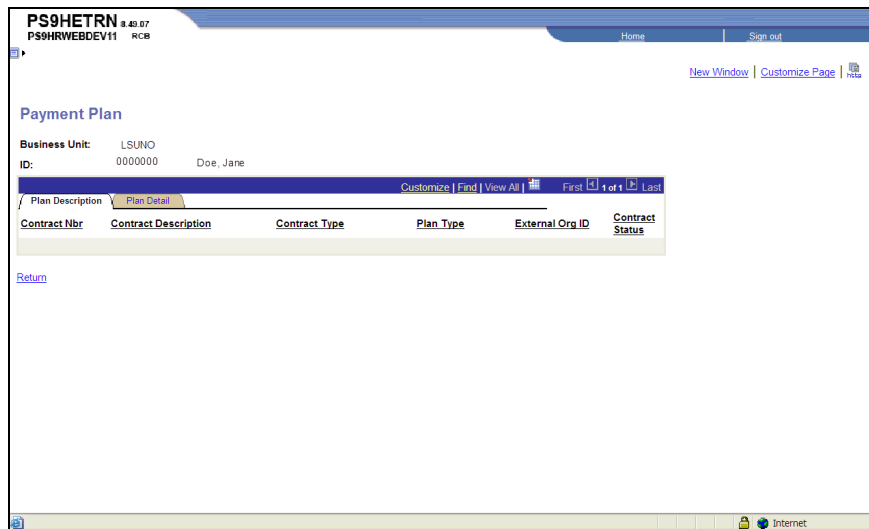
| | | | | | |
|------------|--------------------------------------|----------|------------|--------|--|
| Equip | EQUIP001 - Summer-New Orleans 2008 | 0.00 USD | 05/21/2008 | Active | Account Details   |
| General | GENERAL001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details   |
| GRADUATION | GRADUAT001 - Summer-New Orleans 2008 | 85.00 | 05/21/2008 | Active | Account Details   |
| REG | REG001 - Summer-New Orleans 2008 | 0.00 | 05/19/2008 | Active | Account Details   |
| Tuition | TUITION001 - Summer-New Orleans 2008 | 0.00 | 05/21/2008 | Active | Account Details   |
| GRADUATION | GRADUAT001 - Spring-New Orleans 2008 | 0.00 | 01/11/2008 | Active | Account Details   |
| Optional | OPTFEE001 - Spring-New Orleans 2008 | 0.00 | 01/15/2008 | Active | Account Details   |

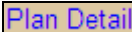
Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

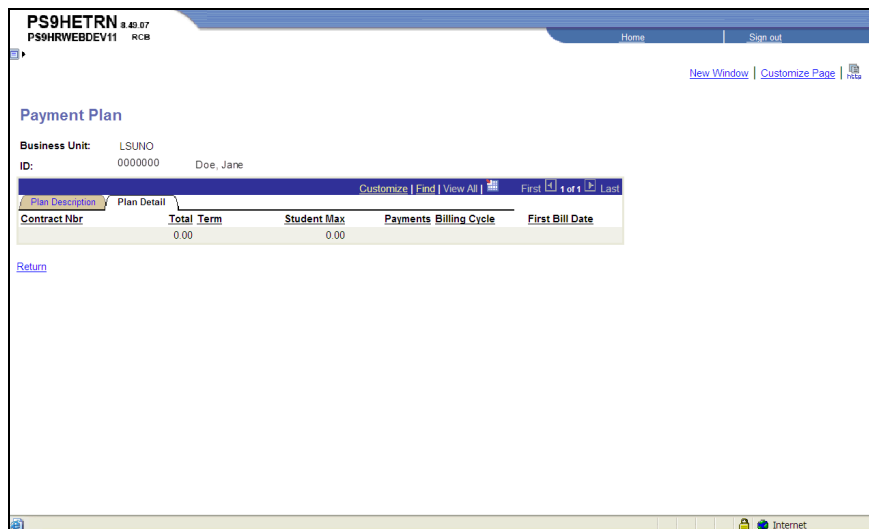
[Return to Search](#) [Notify](#)

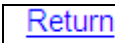
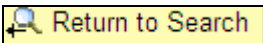
Internet

| Step | Action |
|------|---|
| 23. | Click the Payment Plans link. Payment Plans |



| Step | Action |
|------|--|
| 24. | Click the Plan Detail tab.  |

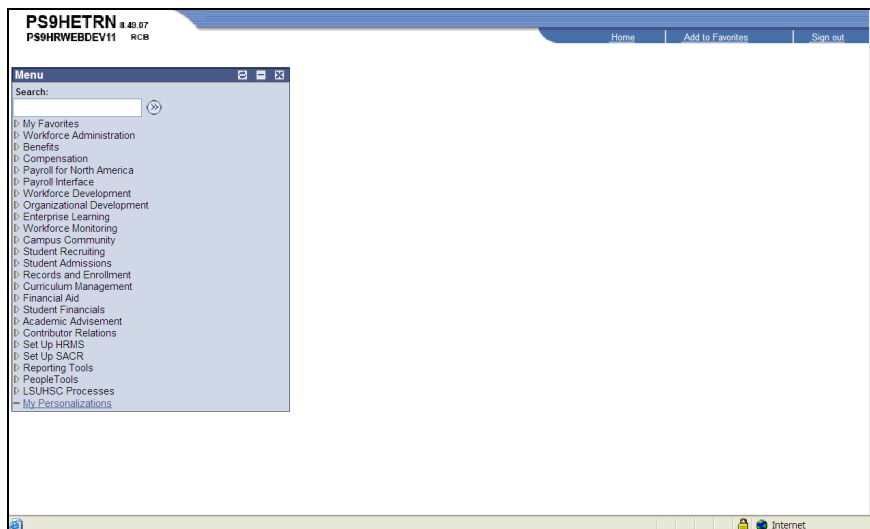


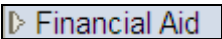
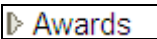

| Step | Action |
|------|---|
| 25. | Click the Return button.  |
| 26. | Click the Return to Search link to view the Customer Account Search page.  |
| 27. | This completes this topic on how to view Customer Accounts. End of Procedure. |

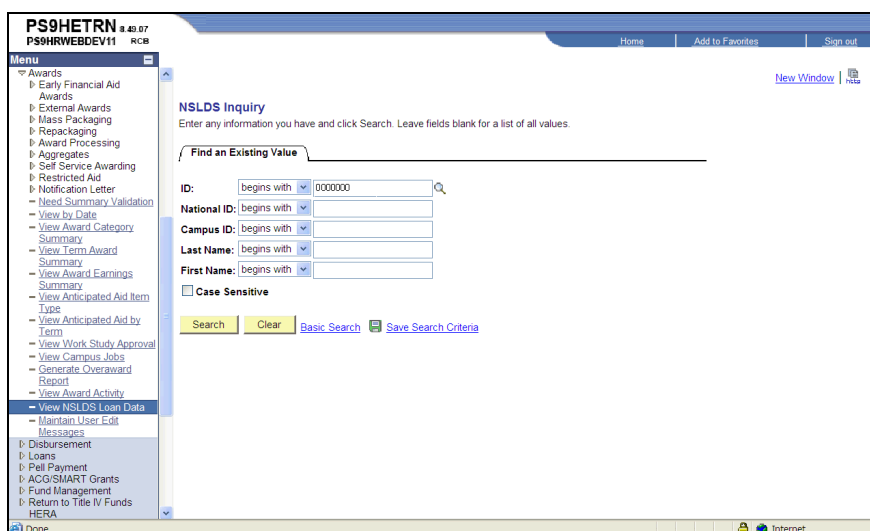
View NSLDS Data

Procedure

In this topic you will learn how to view NSLDS Data.



| Step | Action |
|------|--|
| 1. | Click the Financial Aid link.  |
| 2. | Click the Awards link.  |
| 3. | Click the View NSLDS Loan Data link.  |



Training Guide

Financial Aid



| Step | Action |
|------|--|
| 4. | Enter the Student ID, and then click the Search button. |

PS9HETRN 43.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

NSLDS Information NSLDS Loan Detail NSLDS Pell NSLDS AG NSLDS NSG NSLDS Additional Information

Doe, Jane 0000000

Last Updated: 07/29/2005 Last Effseq: 1 NSLDS Transaction Nbr: 1

SSN: 434- NSLDS Transaction Source: ISIR

NSLDS Post-Screening Code(s):

Aggregate Data Find | View All First 1 of 1 Last

Eff Date: 07/29/2005 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR Detail

Transaction FFELP / FDLP

| | Subsidized | UnSub | Unallocated | Combined |
|---------------------------|-------------------|-------|-------------|----------|
| Process Date: 07/21/2005 | | | | |
| Discharged: None | Aggregate: \$0 | \$0 | \$0 | \$0 |
| Default: N | Pending Disb: \$0 | \$0 | \$0 | \$0 |
| Active Bankruptcy: N | Total: \$0 | \$0 | \$0 | \$0 |
| Satisfactory Repayment: N | | | | |
| Fraud: | | | | |

Perkins

| | | | |
|--------------------------------|-----|-----------------------------------|-----|
| Perkins Principal Balance: | \$0 | Perkins Current Year Loan Amount: | \$0 |
| PLUS Outstanding Balance: | \$0 | PLUS Total: | \$0 |
| Grad PLUS Outstanding Balance: | \$0 | Grad PLUS Total: | \$0 |

| Step | Action |
|------|--|
| 5. | Click the Collapse Menu button. |
| 6. | Click the Detail link column. |

PS9HETRN 43.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

NSLDS Information NSLDS Loan Detail NSLDS Pell NSLDS AG NSLDS NSG NSLDS Additional Information

Doe, Jane 0000000

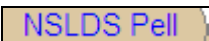
SSN: 434- NSLDS DOB: Last Updated: 07/29/2005 Last Effseq: 1


Aggregate Data Find | View All First 1 of 1 Last

Eff Date: 07/29/2005 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR Detail

Loan Detail Find | View All First 1 of 1 Last

| | | |
|------------------------------|----------------------------|----------------------------|
| NSLDS Ln Seq: | Loan Year: | NSLDS Contact: |
| NSLDS Loan Type: | | Contact Type: |
| NSLDS Status: | | Stat EFFDT: |
| Code: | | NSLDS Loan Type Cd: N/A |
| Guarantor: | | |
| Prin Bal: \$0 | Net Disb: \$0 | Balance Dt: |
| Loan Start: | Loan End: | Grade Level: |
| Orig Scht: | | Capitalize Int: |
| Extra Unsub Ind: | | Perkins Cancellation Type: |
| Guarantee/Approved Amount: | Total Disbursement Amount: | \$0 |
| Guarantee/Approval Date: | NSLDS Lender Service: | |
| Last Loan Disbursement Date: | NSLDS Lender Code: | |

| Step | Action |
|------|---|
| 7. | Click the NSLDS Pell tab.  |



PS9HETRN 43.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

NSLDS Information NSLDS Loan Detail **NSLDS Pell** NSLDS ACG NSLDS NSG NSLDS Additional Information

Doe, Jane 0000000

SSN: 434 NSLDS DOB: Last Updated: 07/29/2005 Last Effseq: 1

Aggregate Data Find | View All First 1 of 1 Last

Eff Date: 07/29/2005 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR Detail


NSLDS Pell Information Find | View All First 1 of 1 Last

| | | | |
|----------------------------|-------------------|-----------------|----------------|
| Pell Seq: | Pell Txn Nbr: | Pell Updt: | Pell Pd to Dt: |
| Pell Sched Amt: | Posted to COD: | Pell Prnt Used: | 0.0000 |
| Pell Schl Cd: | NSLDS Pell Verf: | | |
| Pell Award Amt: | Pell Change Flag: | | |
| Pell Payment Period Limit: | | | |

Return to Search Notify

NSLDS Information | NSLDS Loan Detail | NSLDS Pell | NSLDS ACG | NSLDS NSG | NSLDS Additional Information

Done Internet

| Step | Action |
|------|--|
| 8. | Click the NSLDS ACG tab.  |



PS9HETRN 43.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

NSLDS Information NSLDS Loan Detail NSLDS Pell **NSLDS ACG** NSLDS NSG NSLDS Additional Information

Doe, Jane 0000000

SSN: 434 NSLDS DOB: Last Updated: 07/29/2005 Last Effseq: 1

Aggregate Data Find | View All First 1 of 1 Last

Eff Date: 07/29/2005 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR Detail

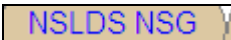
Academic Competitiveness Grant Information Find | View All First 1 of 1 Last

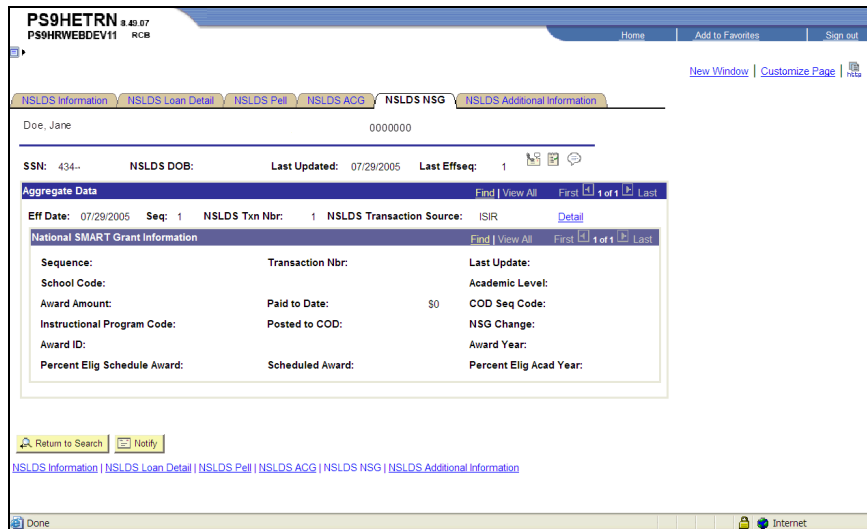
| | | |
|------------------------------|------------------|-------------------------|
| Sequence: | Transaction Nbr: | Last Update: |
| School Code: | Academic Level: | |
| Award Amount: | Paid to Date: | COD Seq Code: |
| Eligibility Code: | Posted to COD: | ACG Change: |
| High School Prog: | Award ID: | Award Year: |
| Percent Elig Schedule Award: | Scheduled Award: | Percent Elig Acad Year: |

Return to Search Notify

NSLDS Information | NSLDS Loan Detail | NSLDS Pell | NSLDS ACG | NSLDS NSG | NSLDS Additional Information

Done Internet

| Step | Action |
|------|--|
| 9. | Click the NSLDS NSG tab.  |



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

NSLDS Information NSLDS Loan Detail NSLDS Pell NSLDS ACG **NSLDS NSG** NSLDS Additional Information

Doe, Jane 00000000

SSN: 434- NSLDS DOB: Last Updated: 07/29/2005 Last Effseq: 1

Aggregate Data Find View All First 1 of 1 Last

Eff Date: 07/29/2005 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR Detail

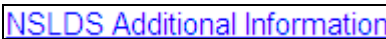
National SMART Grant Information Find View All First 1 of 1 Last


Sequence: Transaction Nbr: Last Update: Academic Level:
School Code: Paid to Date: \$0 COD Seq Code:
Award Amount: Posted to COD: NSG Change:
Instructional Program Code: Award Year:
Award ID: Percent Elig Acad Year:
Percent Elig Schedule Award: Scheduled Award:

Return to Search Notify

NSLDS Information NSLDS Loan Detail NSLDS Pell NSLDS ACG NSLDS NSG NSLDS Additional Information

Done Internet

| Step | Action |
|------|--|
| 10. | Click the NSLDS Additional Information link.  |



PS9HETRN 4.43.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

NSLDS Information NSLDS Loan Detail NSLDS Pell NSLDS ACG NSLDS NSG **NSLDS Additional Information**

Doe, Jane 00000000

SSN: 434- NSLDS DOB: Last Updated: 07/29/2005 Last Effseq: 1

Aggregate Data Find View All First 1 of 1 Last

Eff Date: 07/29/2005 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR Detail

NSLDS Overpayment Information Customize Find View All First 1 of 1 Last

NSLDS Overpayment Seq Aid Year Overpayment Type Overpayment Indicator NSLDS Contact

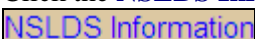
NSLDS Name History Customize Find View All First 1 of 1 Last

NSLDS Name Hist Seq First Name History MI Hist Last Name History

Return to Search Notify

NSLDS Information NSLDS Loan Detail NSLDS Pell NSLDS ACG NSLDS NSG NSLDS Additional Information

start PS Desktop - CF... https://ps9hrc... 12:54 PM

| Step | Action |
|------|---|
| 11. | Click the NSLDS Information tab to return to the main NSLDS information page.  |

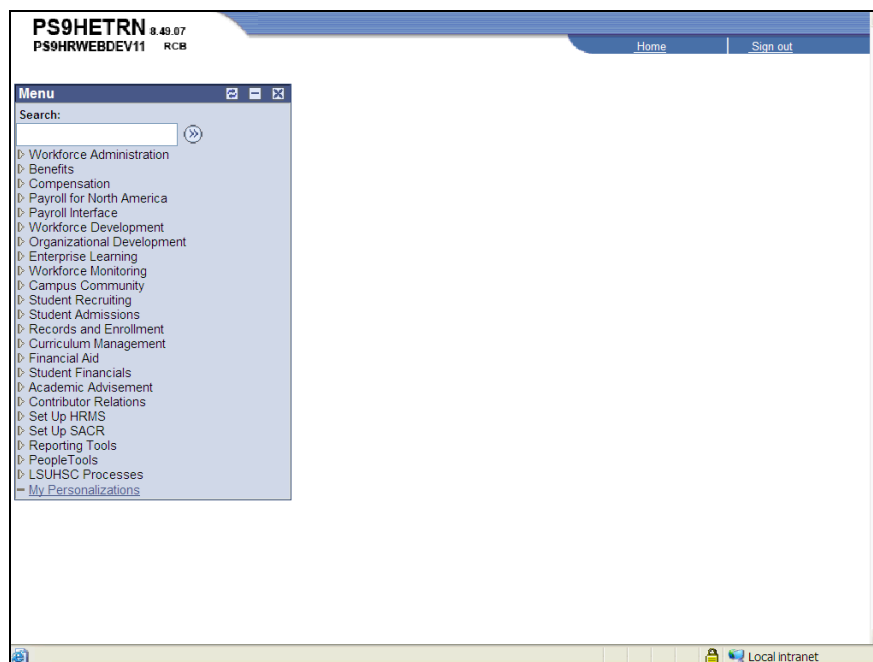
| Step | Action |
|------|---|
| 12. | This completes the topic on Viewing NSLDS data. End of Procedure. |





3 C's

How to Add Comments

Procedure

In this topic you will learn how to Add Comments.



| Step | Action |
|------|--|
| 1. | Click the Campus Community link.  Campus Community |
| 2. | Click the Comments link.  Comments |
| 3. | Click the Comments - Person link.  Comments - Person |
| 4. | Click the Person Comment Entry link.  Person Comment Entry |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Help](#)

Menu

- Enterprise Learning
- Workforce Monitoring
- Campus Community
- Personal Information (Student)
- SEVIS
- Checklists
- Communications
- Comments
 - Comments - Person
 - Person Comment Entry**
 - Person Comment Summary
 - Person Comment Detail
 - Comments - Organization
 - Set Up Comments
 - 3C Engine Trigger Results
 - Run 3C Engine
 - 3C Engine
 - Service Indicators
 - Service Indicators (Student)
 - Organization
 - Committees
 - Campus Event Planning
 - Student Recruiting
 - Student Admissions
 - Records and Enrollment
 - Curriculum Management
 - Financial Aid
 - Student Financials
 - Academic Advisement
 - Contributor Relations
 - Set Up HRMS
 - Set Up SACR
 - Reporting Tools
 - PeopleTools
 - LSUHSC Processes
 - My Personalizations

Person Comment Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

ID: begins with []

Sequence Number: = []

Administrative Function: begins with []

Comment Category: begins with []

Academic Institution: begins with []

Comment Date: = []

National ID: begins with []

Campus ID: begins with []

Last Name: begins with []

First Name: begins with []

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

Done Local Intranet

| Step | Action |
|------|---|
| 5. | Click the Add a New Value tab. Add a New Value |
| 6. | Enter the desired information into the ID field. Enter " 0000000 ". |
| 7. | Click the Add button. Add |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page Help

Person Comment Entry

Jane Doe ID: 0000000

Comment DateTime: 08/22/2008 2:11:13PM

*Administrative Function:

*Academic Institution: LSUHSC - New Orleans

*Comment Category: Variable Data

Comment Data

Comment ID: 0119363 Harold, Carmen P.

Department:



Comment Date: 08/22/2008

Comments

Append Comments:

Save Notify

Local Intranet

| Step | Action |
|------|---|
| 8. | Click the Collapse Menu button.  |
| 9. | Click the Look up Administrative Function button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Help

Look Up Administrative Function

Administrative Function: begins with

Description: begins with


Look Up Clear Cancel Basic Lookup

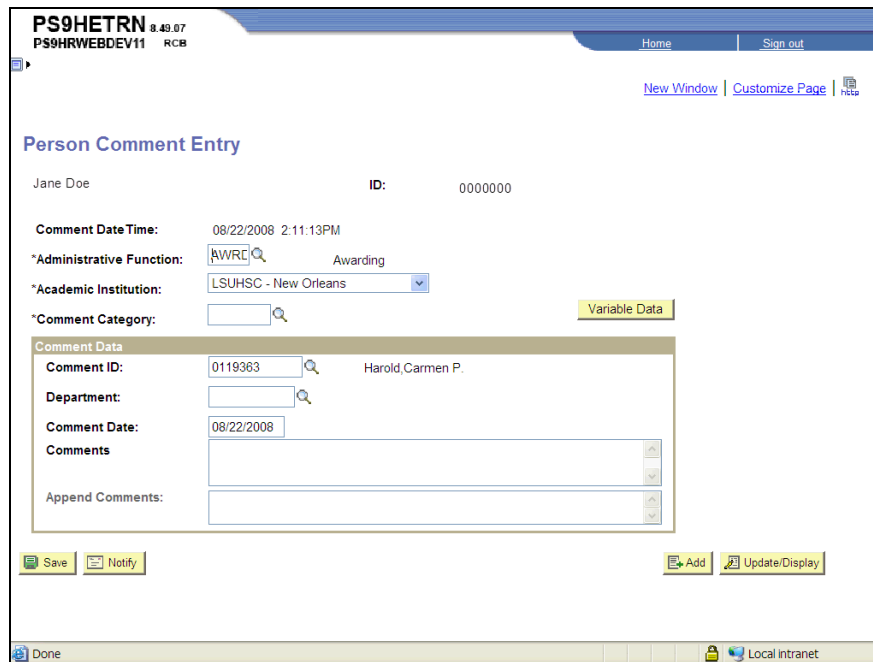
Search Results

View All First 1-32 of 32 Last

| Administrative Function | Description |
|-------------------------|-------------------------------|
| ADMA | Admissions Application |
| ADMP | Admissions Program |
| AVAK | Advancement Acknowledgements |
| AVIN | Advancement Initiatives |
| AVMR | Advancement Member Benefit |
| AVMS | Advancement Membership |
| AWRD | Awarding |
| BDGT | Budget Maintenance |
| EVNT | Event |
| FINA | Financial Aid |
| GEN | General |
| IHC | International Health Coverage |
| ISIR | ISIR Corrections |
| LOAN | Loan |
| NLBP | Internships NLD |
| NLOW | Educational contracts NLD |
| PROP | Prospect Program |
| PROS | Prospect |
| PSSV | Prospect Self Service |

Local Intranet

| Step | Action |
|------|---|
| 10. | Click an entry from the Look Up Administration Function drop-down.  |



PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB


Home Sign out

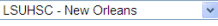
New Window Customize Page



Person Comment Entry

Jane Doe ID: 0000000

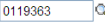
Comment DateTime: 08/22/2008 2:11:13PM


*Administrative Function:  Awarding


*Academic Institution: 


*Comment Category:  


Comment Data





Comment ID:  Harold, Carmen P.


Department: 

Comment Date: 

Comments 

Append Comments: 

Done  Local Intranet

| Step | Action |
|------|--|
| 11. | Click the Look up Comment Category button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Help](#)

Look Up Comment Category

Comment Category:

Description:

[Basic Lookup](#)

Search Results

View All First 1-2 of 2 Last

| Comment Category | Description |
|-----------------------|---|
| AWRDN | Awarding New Orleans |
| LOANN | Loan Processing-New Orleans |

Local intranet

| Step | Action |
|------|--|
| 12. | Select a Look Up Comment Category from the drop-down list. Awarding New Orleans |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Person Comment Entry

Jane Doe ID: 0000000

Comment DateTime: 08/22/2008 2:11:13PM

*Administrative Function: Awarding

*Academic Institution:

*Comment Category: Awarding New Orleans

Comment Data

Comment ID: Harold, Carmen P.

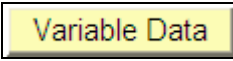
Department:

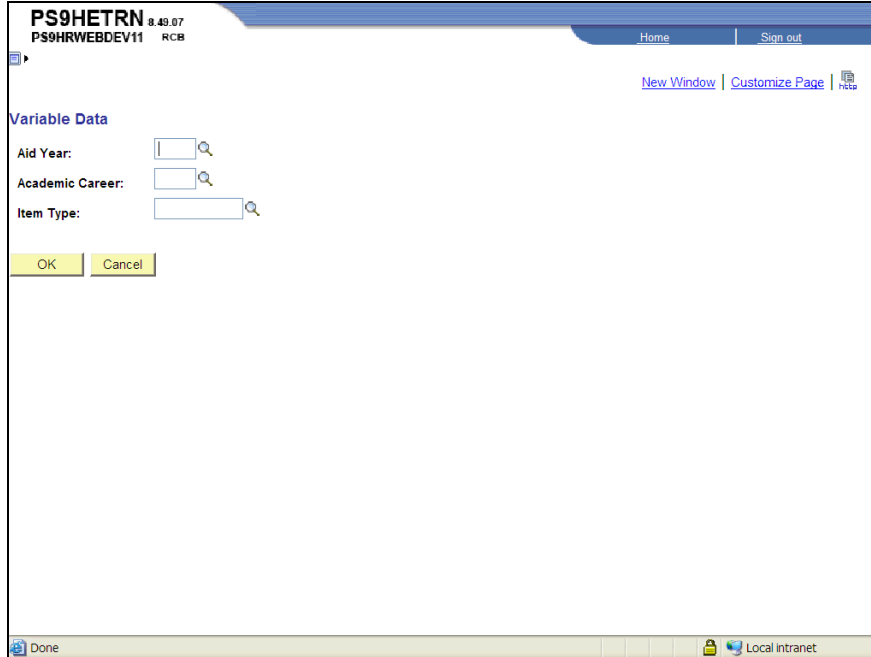
Comment Date:


Comments:

Append Comments:

Done Local intranet


| Step | Action |
|------|--|
| 13. | <p>Note: Variable Data is required.</p> <p>Click the Variable Data button.</p>  |



| Step | Action |
|------|--|
| 14. | <p>Click the Look up Aid Year button.</p>  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#) 

Look Up Aid Year

EmpID: 0023561
Academic Institution: LSUHS
Aid Year:

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View All First 1-6 of 6 Last


| Aid Year |
|----------|
| 2008 |
| 2007 |
| 2006 |
| 2005 |
| 2004 |
| 2003 |

Local intranet




| Step | Action |
|------|--|
| 15. | Select a <u>Aid Year</u> from the drop-down. <div>2007</div> |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

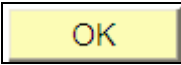
[New Window](#) [Customize Page](#) 

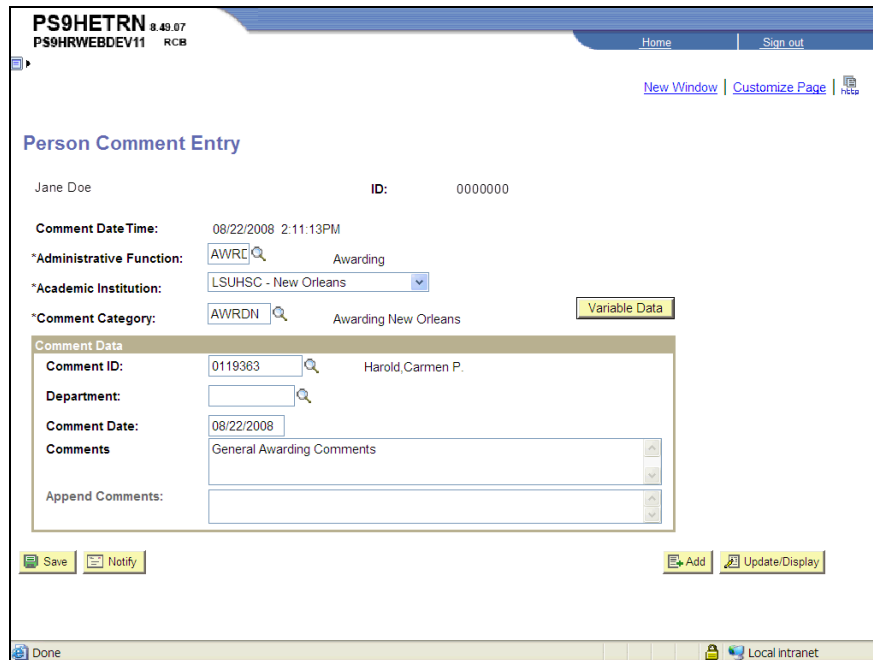
Variable Data

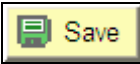
Aid Year:  Federal Aid Year 2006-2007
Academic Career: 
Item Type: 

OK Cancel

Done Local intranet

| Step | Action |
|------|--|
| 16. | Click the OK button.  |

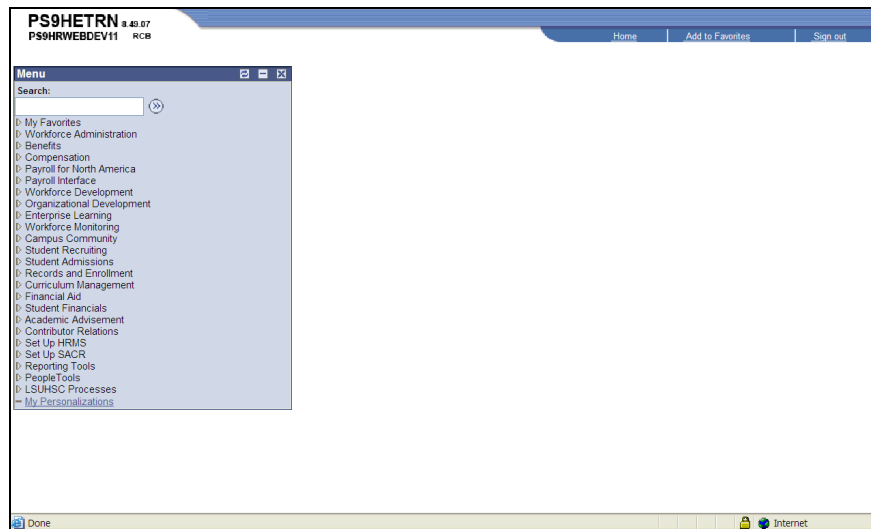


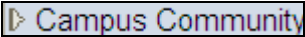
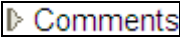
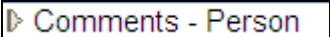

| Step | Action |
|------|--|
| 17. | Click the Save button to save the Comment.  |
| 18. | This completes the topic on how to Add Comment. End of Procedure. |

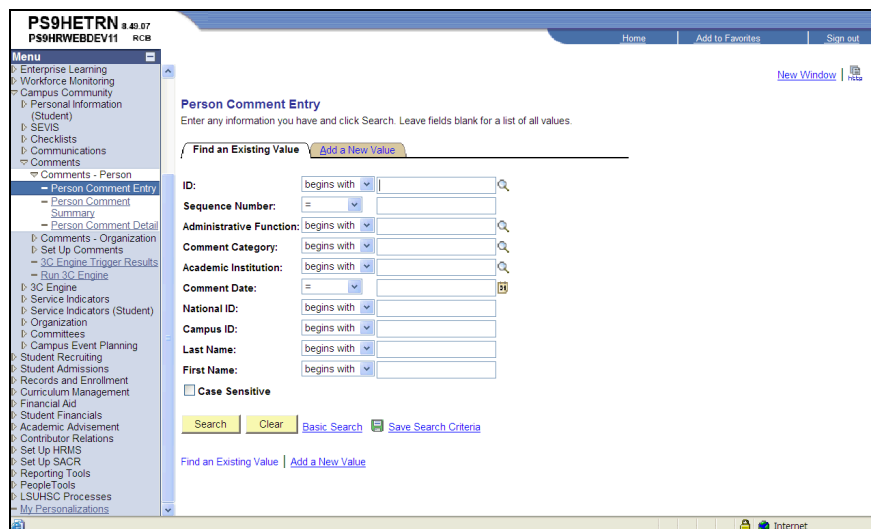
How to Append or Update a Comment

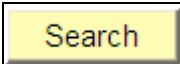


Procedure

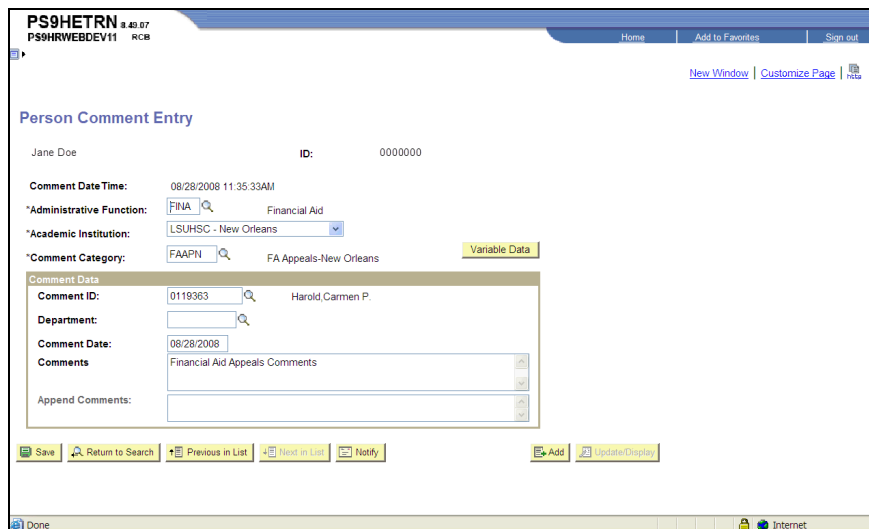
In this topic you will learn how to Append and Update a Comment.



| Step | Action |
|------|--|
| 1. | Click the Campus Community link.  |
| 2. | Click the Comments link.  |
| 3. | Click the Comments - Person link.  |
| 4. | Click the Person Comment Entry link.  |



| Step | Action |
|------|--|
| 5. | Enter the desired information into the ID field. Enter "0000000". |
| 6. | Click the Search button.  |
| 7. | Click the Collapse Menu button.  |
| 8. | Click an entry in the ID column.  |



PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Person Comment Entry

Jane Doe ID: 0000000

Comment Date Time: 08/28/2008 11:35:33AM

*Administrative Function: Financial Aid

*Academic Institution:

*Comment Category: FA Appeals-New Orleans [Variable Data](#)

Comment Data

Comment ID: Harold, Carmen P.

Department:

Comment Date:

Comments:

Append Comments:

[Save](#)
[Return to Search](#)
[Previous in List](#)
[Next in List](#)
[Notify](#)
[Add](#)
[Update Display](#)

Done Internet

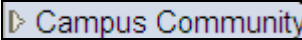
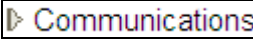
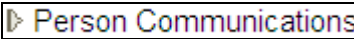

| Step | Action |
|------|--------------------------|
| 9. | Append Comments |
| 10. | End of Procedure. |

How to Add Communications

Procedure

In this topic you will how to use Add Communications.



| Step | Action |
|------|--|
| 1. | Click the Campus Community link.  |
| 2. | Click the Communications link.  |
| 3. | Click the Person Communications link.  |
| 4. | Click the Communication Management link.  |

| Step | Action |
|------|--|
| 5. | Click the Add a New Value tab. Add a New Value |
| 6. | Enter the desired information into the ID field. Enter " 000000 ". |
| 7. | Click the Add button. Add |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page Help

Menu

- Person Communications
 - Communication Management
 - Communication Summary
 - Communication Detail
 - Communication Letter Data
- Organization Communications
- Mass Change - Communications
- Set up Communications
- 3C Engine Trigger Results
- Run 3C Engine
- Letter Generation
- Communication Generation
- Envelope and Label Generation
- Reset Communication
- Comments
- 3C Engine
- Service Indicators
- Service Indicators (Student)
- Organization
- Committees
- Campus Event Planning
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advisement
- Contributor Relations
- Set Up HRMS
- Set Up SACR

Done

Person Communication Communication Recipient Data

Jane Doe ID: 000000

Communication Assignment

Assign DateTime: 08/22/2008 2:43:45PM

*Function:

*Institution: LSUHSC - New Orleans

Comm Key:

*Category:

*Context:

*Method:

*Direction:

Letter Code: ☐ Include Enclosures



Communication Process Details

Communication Date: 08/22/2008 Begin Time: End Time:

Comments: ☐ Print Comment

Communication ID: 0119363 Harold Carmon B

Local Intranet

| Step | Action |
|------|--|
| 8. | Click the Collapse Menu button.  |
| 9. | Click the Look up Function button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Help

Look Up Function

Administrative Function: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

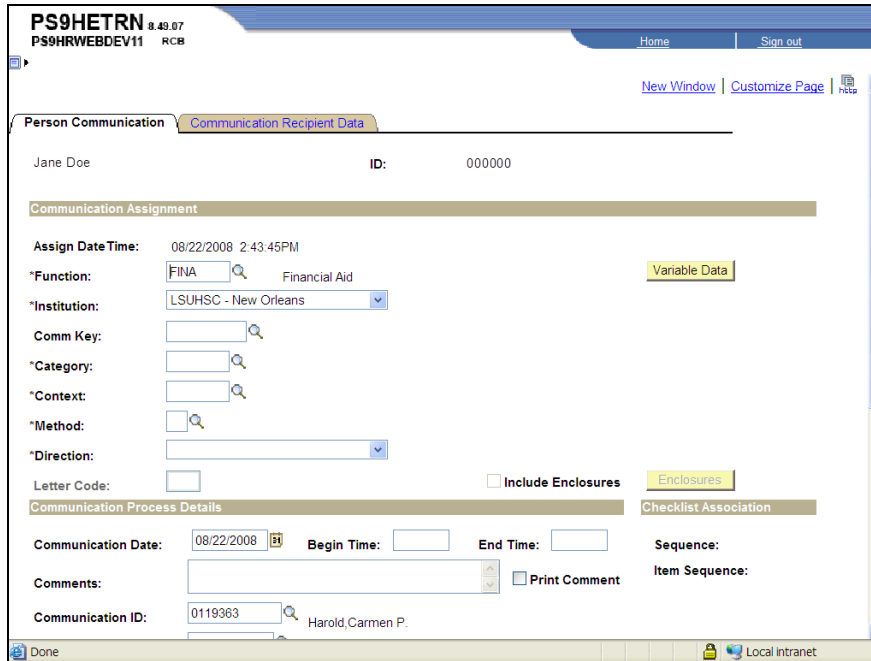
Search Results

View All First 1-32 of 32 Last


| Administrative Function | Description |
|-------------------------|-------------------------------|
| ADMA | Admissions Application |
| ADMP | Admissions Program |
| AVAK | Advancement Acknowledgements |
| AVIN | Advancement Initiatives |
| AVMB | Advancement Member Benefit |
| AVMS | Advancement Membership |
| AWRD | Awarding |
| BDGT | Budget Maintenance |
| EVNT | Event |
| FINA | Financial Aid |
| GEN | General |
| IHC | International Health Coverage |
| ISIR | ISIR Corrections |
| LOAN | Loan |
| NLBP | Internships NLD |
| NLOW | Educational contracts NLD |
| PROP | Prospect Program |
| PROS | Prospect |
| PSSV | Prospect Self Service |

Local Intranet

| Step | Action |
|------|---|
| 10. | Click an entry in the Description column. Financial Aid |



The screenshot shows the PS9HETRN web application interface. The top navigation bar includes "Home" and "Sign out" links. The main content area is titled "Person Communication" and "Communication Recipient Data". It displays information for Jane Doe with ID 000000. The "Communication Assignment" section shows the assign date/time as 08/22/2008 2:43:45PM. The "Function" is set to FINA (Financial Aid), and the "Institution" is LSUHSC - New Orleans. Other fields include Comm Key, Category, Context, Method, and Direction. The "Letter Code" field is empty, and there is an "Include Enclosures" checkbox. The "Communication Process Details" section shows the communication date as 08/22/2008, with begin and end time fields. The "Comments" field is empty, and there is a "Print Comment" checkbox. The "Communication ID" is 0119363, and the recipient is listed as Harold, Carmen P. The bottom status bar shows "Done" and "Local Intranet".

| Step | Action |
|------|--|
| 11. | Click the Look up Category (Alt+5) button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#)

Look Up Category

Communication Category: begins with

Description: begins with

[Basic Lookup](#)

Search Results

View All First 1-2 of 2 Last

| Communication Category | Description |
|------------------------|---------------------------|
| AWARD | Awarding |
| FINANO | Financial Aid-New Orleans |

Local intranet

| Step | Action |
|------|---|
| 12. | Click an entry in the Description column. Financial Aid-New Orleans |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#) [Customize Page](#)

Person Communication **Communication Recipient Data**

Jane Doe ID: 000000

Communication Assignment

Assign DateTime: 08/22/2008 2:43:45PM

*Function: FINA Financial Aid [Variable Data](#)

*Institution: LSUHSC - New Orleans

Comm Key:

*Category: FINANO Financial Aid-New Orleans

*Context:

*Method:

*Direction:

Letter Code: ☐ Include Enclosures [Enclosures](#)


Communication Process Details

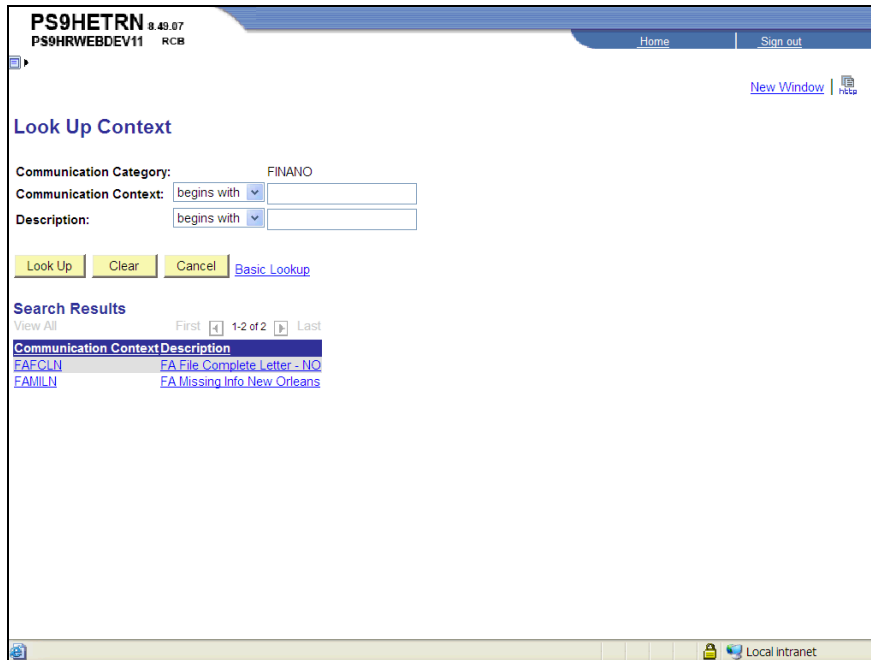
Communication Date: 08/22/2008 Begin Time: End Time: Sequence:

Comments: ☐ Print Comment Item Sequence:

Communication ID: 0119363 Harold, Carmen P.

Local intranet

| Step | Action |
|------|---|
| 13. | Click the Look up Context (Alt+5) button.  |



The screenshot shows the PS9HETRN application interface. At the top, there is a header with 'PS9HETRN 8.49.07' and 'PS9HRWEBDEV11 RCB'. Navigation links include 'Home' and 'Sign out'. A 'New Window' button is also present. The main section is titled 'Look Up Context'. It contains search criteria: 'Communication Category' set to 'FINANO', 'Communication Context' set to 'begins with', and 'Description' set to 'begins with'. Below these are buttons for 'Look Up', 'Clear', 'Cancel', and a link for 'Basic Lookup'. The 'Search Results' section shows a table with two columns: 'Communication Context' and 'Description'. The results are:

| Communication Context | Description |
|-----------------------|------------------------------|
| FAFCLN | FA File Complete Letter - NQ |
| FAMILN | FA Missing Info New Orleans |

 The first result, 'FA File Complete Letter - NQ', is highlighted. At the bottom of the browser window, the address bar shows 'Local intranet'.

| Step | Action |
|------|--|
| 14. | Click an entry in the Description column. FA File Complete Letter - NQ |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Person Communication Communication Recipient Data

Jane Doe ID: 000000

Communication Assignment

Assign Date Time: 08/22/2008 2:43:45PM

*Function: FINA Financial Aid Variable Data

*Institution: LSUHSC - New Orleans

Comm Key:

*Category: FINANO Financial Aid-New Orleans

*Context: FAFCLN FA File Complete Letter - NO

*Method:

*Direction:

Letter Code: Include Enclosures Enclosures


Communication Process Details Checklist Association

Communication Date: 08/22/2008 Begin Time: End Time: Sequence:

Comments: Print Comment Item Sequence:

Communication ID: 0119363 Harold, Carmen P.

Done Local Intranet

| Step | Action |
|------|--|
| 15. | Click the Look up Method button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Look Up Method

Cancel

Search Results

View All First 1 of 1 Last

| Academic Institution | Communication Context | Communication Method |
|----------------------|-----------------------|----------------------|
| LSUHS | FAFCLN | Letter |

Local Intranet

| Step | Action |
|------|---|
| 16. | Click an entry in the Communication Context column. FAFCLN |

PS9HETRN 8.49.97
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page

Person Communication **Communication Recipient Data**

Jane Doe ID: 0000001

Communication Assignment

Assign DateTime: 08/22/2008 2:43:45PM

*Function: FINA Financial Aid **Variable Data**

*Institution: LSUHSC - New Orleans

Comm Key:

*Category: FINANO Financial Aid-New Orleans

*Context: FAFCLN FA File Complete Letter - NO

*Method: L Letter

*Direction:

Letter Code: ☐ Include Enclosures **Enclosures**


Communication Process Details **Checklist Association**

Communication Date: 08/22/2008 Begin Time: End Time: Sequence:

Comments: Print Comment Item Sequence:

Communication ID: 0119363 Harold, Carmen P.

Done Local intranet

| Step | Action |
|------|---|
| 17. | Click the Direction list. <input type="text"/> |
| 18. | Click the Outgoing Communication list item. Outgoing Communication |
| 19. | Click the Look up Letter Code (Alt+5) button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#)

Look Up Letter Code

Academic Institution: LSUHS
Communication Context: FAFCLN
Communication Method: Letter
Communication Direction: Outgoing Communication
Letter Code: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View All First 1 of 1 Last

| Letter Code | Description |
|-------------|-----------------------|
| FA7 | File Complete Letters |

Local intranet

| Step | Action |
|------|---|
| 20. | Click an entry in the Description column. File Complete Letters |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#) [Customize Page](#)

Person Communication **Communication Recipient Data**

Jane Doe ID: 0000001

Communication Assignment

Assign DateTime: 08/22/2008 2:43:45PM

*Function: FINA Financial Aid [Variable Data](#)

*Institution: LSUHSC - New Orleans

Comm Key:

*Category: FINANO Financial Aid-New Orleans

*Context: FAFCLN FA File Complete Letter - NO

*Method: L Letter

*Direction: Outgoing Communication

Letter Code: FA7 File Complete Letters ☐ Include Enclosures [Enclosures](#)

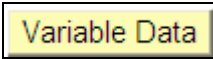
Communication Process Details

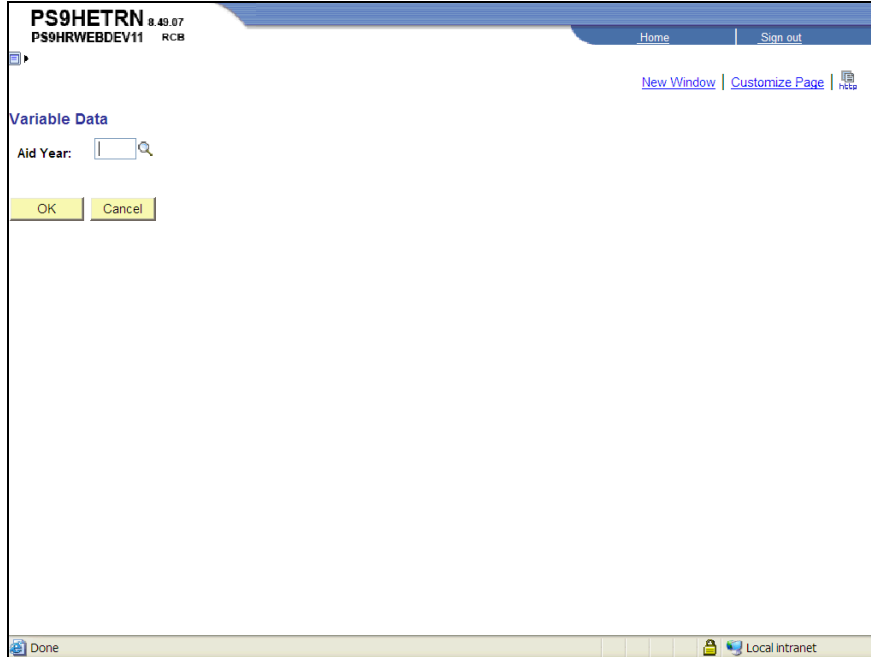
Communication Date: 08/22/2008 Begin Time: End Time: Sequence:

Comments: ☐ Print Comment Item Sequence:


Communication ID: 0119363 Harold, Carmen P.

Done Local intranet

| Step | Action |
|------|---|
| 21. | <p>Note: Variable Data is required in order to complete this process.</p> <p>Click the Variable Data button.</p>  |



The screenshot shows a web browser window with the title "PS9HETRN 8.49.07 PS9HRWEBDEV11 RCB". The browser's address bar shows "Home" and "Sign out" links. The main content area displays the "Variable Data" dialog box. The dialog box has a title bar "Variable Data" and a search input field labeled "Aid Year:" with a magnifying glass icon. Below the input field are "OK" and "Cancel" buttons. The status bar at the bottom of the browser window shows "Done" and "Local intranet".

| Step | Action |
|------|--|
| 22. | <p>Click the Look up Aid Year (Alt+5) button.</p>  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window help

Look Up Aid Year

EmpID: 0023561
Academic Institution: LSUHS
Aid Year: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-6 of 6 Last

| Aid Year |
|----------|
| 2008 |
| 2007 |
| 2006 |
| 2005 |
| 2004 |
| 2003 |

Local Intranet

| Step | Action |
|------|--|
| 23. | Click an entry in the Aid Year column. <u>2007</u> |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

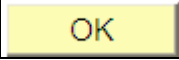
New Window Customize Page help

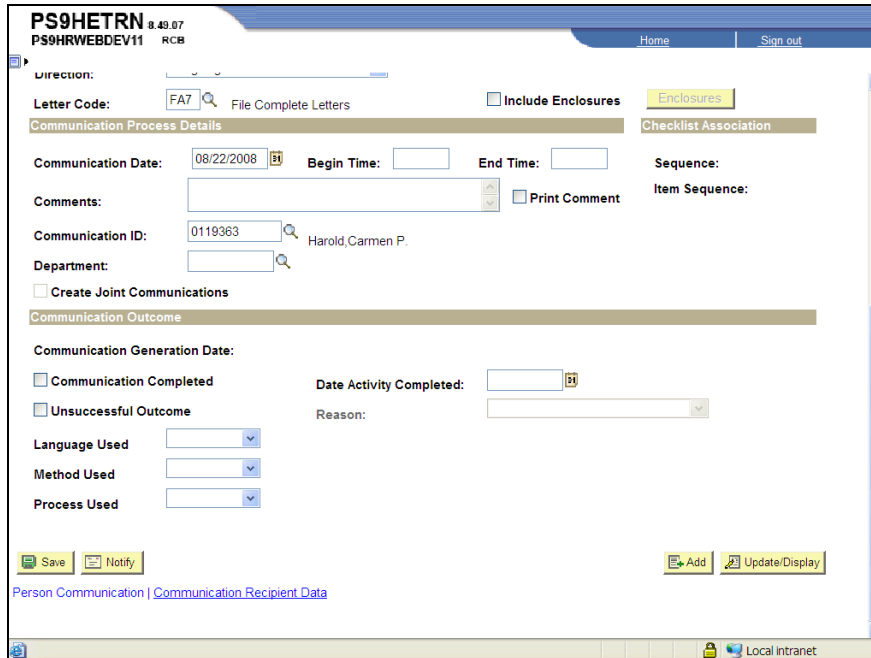
Variable Data

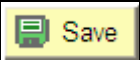
Aid Year: 2007 Federal Aid Year 2006-2007

OK Cancel

Done Local Intranet

| Step | Action |
|------|--|
| 24. | Click the OK button.  |



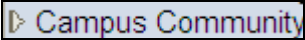
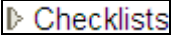
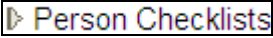

| Step | Action |
|------|--|
| 25. | Click the Save button.  |
| 26. | End of Procedure. |

How to Add a Checklist

Procedure

In this topic you will learn how to Add a Checklist.



| Step | Action |
|------|---|
| 1. | Click the Campus Community link.  |
| 2. | Click the Checklists link.  |
| 3. | Click the Person Checklists link.  |
| 4. | Click the Checklist Management - Person link.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Menu

- Person Checklists
 - Checklist Management - Person
 - Item Update - by Person
 - Item Update - by Item
 - Person Checklist Summary
 - Person Checklist Detail
 - Person Tracking Summary
 - Person Tracking Inquiry
 - Organization Checklists
 - Event Checklists
 - Mass Change - Checklists
 - Process Checklists
 - Set up Checklists
 - 3C Engine Trigger Results
 - Run 3C Engine
 - Communications
 - Comments
 - 3C Engine
 - Service Indicators
 - Service Indicators (Student)
 - Organization
 - Committees
 - Campus Event Planning
 - Student Recruiting
 - Student Admissions
 - Records and Enrollment
 - Curriculum Management
 - Financial Aid
 - Student Financials
 - Academic Advisement
 - Contributor Relations
 - Set Up HRMS
 - Set Up SACR
 - Reporting Tools

Checklist Management - Person

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

ID: begins with

Sequence Number: =

Administrative Function: begins with

Checklist Code: begins with

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

Done Local Intranet

| Step | Action |
|------|---|
| 5. | Click the Add a New Value tab. Add a New Value |
| 6. | Enter the desired information into the ID field. Enter " 0000000 ". |
| 7. | Click the Add button. Add |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Customize Page Help

Menu

- Person Checklists
 - Checklist Management - Person
 - Item Update - by Person
 - Item Update - by Item
 - Person Checklist Summary
 - Person Checklist Detail
 - Person Tracking Summary
 - Person Tracking Inquiry
 - Organization Checklists
 - Event Checklists
 - Mass Change - Checklists
 - Process Checklists
 - Set up Checklists
 - 3C Engine Trigger Results
 - Run 3C Engine
 - Communications
 - Comments
 - 3C Engine
 - Service Indicators
 - Service Indicators (Student)
 - Organization
 - Committees
 - Campus Event Planning
 - Student Recruiting
 - Student Admissions
 - Records and Enrollment
 - Curriculum Management
 - Financial Aid
 - Student Financials
 - Academic Advisement
 - Contributor Relations
 - Set Up HRMS
 - Set Up SACR
 - Reporting Tools

Checklist Management 1 Checklist Management 2

Jane Doe ID: 0000001

Checklist Date Time: 08/22/2008 2:53:59PM Variable Data

*Administrative Function:

*Academic Institution: LSUHSC - New Orleans

*Checklist Code:

*Status: Initiated Status Date: 08/22/2008

Due Date:



Due Amount: Currency Code:

Comments:

Save Notify

Checklist Management 1 | Checklist Management 2

Done Local Intranet

| Step | Action |
|------|---|
| 8. | Click the Collapse (Ctrl+Y) Menu button.  |
| 9. | Click the Look up Administrative Function (Alt+5) button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window Help

Look Up Administrative Function

Administrative Function: begins with

Description: begins with


Look Up Clear Cancel Basic Lookup

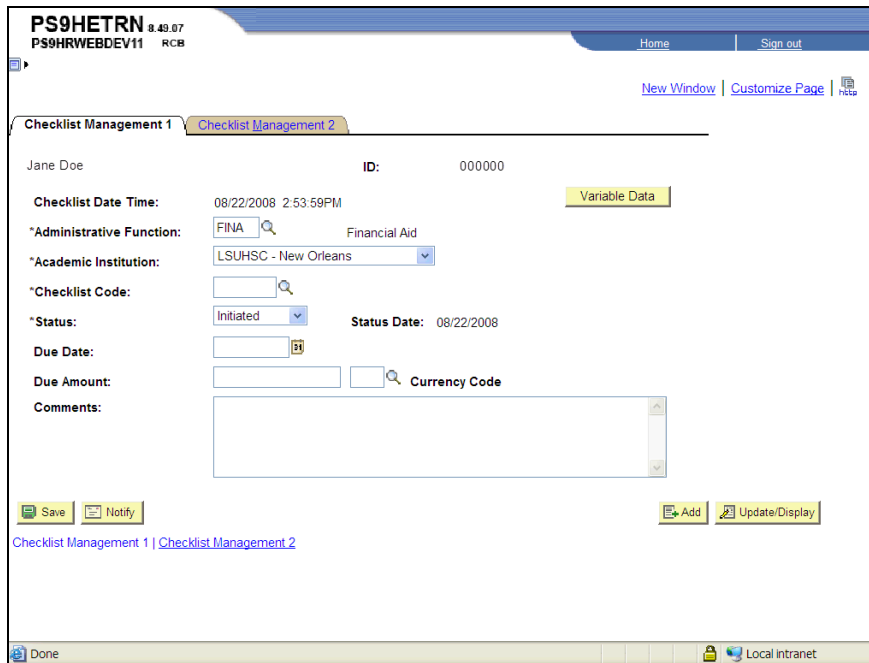
Search Results

View All First 1-32 of 32 Last

| Administrative Function | Description |
|-------------------------|-------------------------------|
| ADMA | Admissions Application |
| ADMP | Admissions Program |
| AVAK | Advancement Acknowledgements |
| AVIN | Advancement Initiatives |
| AVMR | Advancement Member Benefit |
| AVMS | Advancement Membership |
| AWRD | Awarding |
| BDGT | Budget Maintenance |
| EVNT | Event |
| FINA | Financial Aid |
| GEN | General |
| IHC | International Health Coverage |
| ISIR | ISIR Corrections |
| LOAN | Loan |
| NLBP | Internships NLD |
| NLOW | Educational contracts NLD |
| PROP | Prospect Program |
| PROS | Prospect |
| PSSV | Prospect Self Service |


Local Intranet

| Step | Action |
|------|--|
| 10. | Select an entry from the Administrative Function drop-down list.  |



PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB


Home Sign out

[New Window](#) [Customize Page](#) 


Checklist Management 1 Checklist Management 2

Jane Doe ID: 000000


Checklist Date Time: 08/22/2008 2:53:59PM [Variable Data](#)


*Administrative Function: FINA  Financial Aid


*Academic Institution: LSUHSC - New Orleans

*Checklist Code: 

*Status: Initiated Status Date: 08/22/2008


Due Date: 


Due Amount:  Currency Code

Comments: 

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

[Checklist Management 1](#) | [Checklist Management 2](#)

Done  Local Intranet

| Step | Action |
|------|--|
| 11. | Click the Look up Checklist Code (Alt+5) button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#)

Look Up Checklist Code

Checklist Code:
 Description:
 Checklist Type:

[Basic Lookup](#)

Search Results

View All First 1 of 1

| Checklist Code | Description | Checklist Type |
|-----------------------|--|----------------|
| FAREQ | Financial Aid Requirements-NO Req List | |

Local Intranet

| Step | Action |
|------|---|
| 12. | Click an entry in the Description column. Financial Aid Requirements-NO |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#) [Customize Page](#)

Checklist Management 1 Checklist Management 2

Jane Doe ID: 000000

Checklist Date Time: 08/22/2008 2:53:59PM

*Administrative Function: Financial Aid

*Academic Institution:

*Checklist Code: Financial Aid Requirements-NO

*Status: Status Date: 08/22/2008




Due Date:

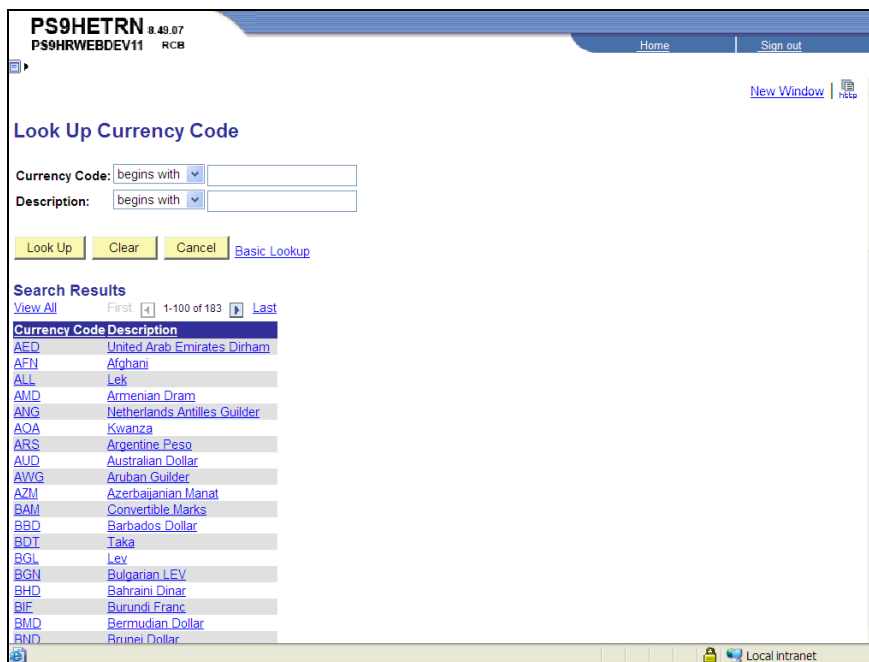
Due Amount: Currency Code

Comments:

[Checklist Management 1](#) | [Checklist Management 2](#)

Done Local Intranet

| Step | Action |
|------|---|
| 13. | Click the Choose a date (Alt+5) button.  |
| 14. | Click the 1 link.  |
| 15. | Enter the desired information into the Due Amount field. Enter " 100.00 ". |
| 16. | Click the Look up Currency Code (Alt+5) button.  |



PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

New Window

Look Up Currency Code

Currency Code: begins with

Description: begins with

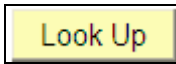

Look Up Clear Cancel Basic Lookup

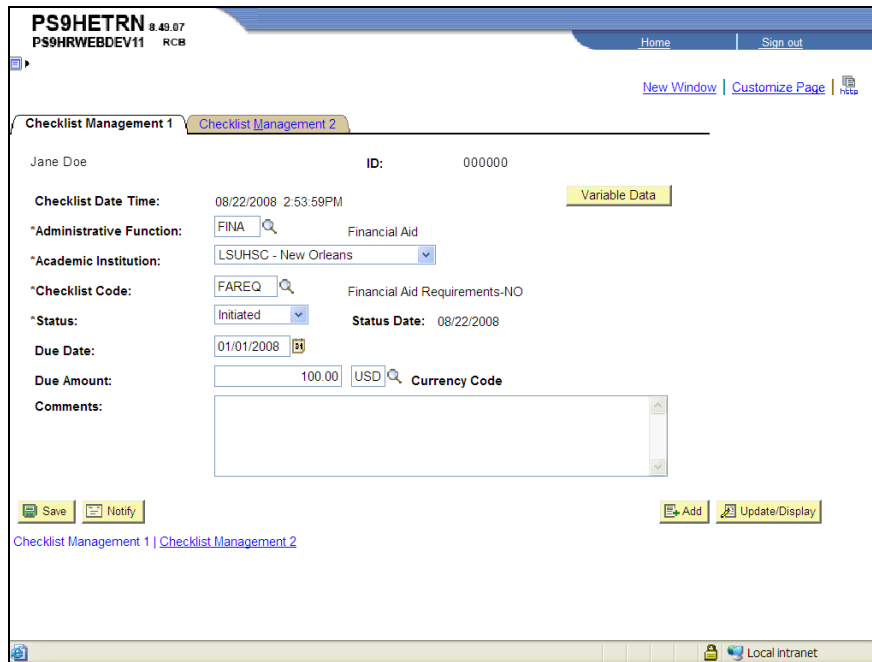
Search Results

[View All](#) First 1-100 of 183 Last

| Currency Code | Description |
|---------------|------------------------------|
| AED | United Arab Emirates Dirham |
| AFN | Afghani |
| ALL | Lek |
| AMD | Armenian Dram |
| ANG | Netherlands Antilles Guilder |
| AOA | Kwanza |
| ARS | Argentine Peso |
| AUD | Australian Dollar |
| AWG | Aruban Guilder |
| AZM | Azerbaijani Manat |
| BAM | Convertible Marks |
| BBB | Barbados Dollar |
| BDT | Taka |
| BGL | Lev |
| BGN | Bulgarian LEV |
| BHD | Bahraini Dinar |
| BIF | Burundi Franc |
| BMD | Bermudian Dollar |
| BND | Brunei Dollar |


Local intranet

| Step | Action |
|------|---|
| 17. | Enter the desired information into the Currency Code field. Enter " u ". |
| 18. | Click the Look Up button.  |
| 19. | Click an entry in the Description column.  |



PS9HETRN 8.49.07
 PS9HRWEBDEV11 RCB

[Home](#) | [Sign out](#)

[New Window](#) | [Customize Page](#) | 

Checklist Management 1 | **Checklist Management 2**

Jane Doe ID: 000000

Checklist Date Time: 08/22/2008 2:53:59PM **Variable Data**

*Administrative Function: FINA Financial Aid

*Academic Institution: LSUHSC - New Orleans

*Checklist Code: FAREQ Financial Aid Requirements-NO

*Status: Initiated Status Date: 08/22/2008

Due Date: 01/01/2008

Due Amount: 100.00 USD Currency Code

Comments:

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

[Checklist Management 1](#) | [Checklist Management 2](#)

Local Intranet


| Step | Action |
|------|--|
| 20. | Enter the desired information into the Comments field. Enter " Adding test comments to Checklist Management ". |
| 21. | <p>Note: Variable Data is required to complete this process.</p> <p>Click the Variable Data button.</p> <div>Variable Data</div> |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out


[New Window](#) | [Customize Page](#) | [Help](#)

Variable Data

Aid Year: 

OK Cancel

Done Local intranet

| Step | Action |
|------|--|
| 22. | Click the Look up Aid Year (Alt+5) button.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#) | [Help](#)

Look Up Aid Year

EmpID: 0023561
Academic Institution: LSUHS
Aid Year: begins with

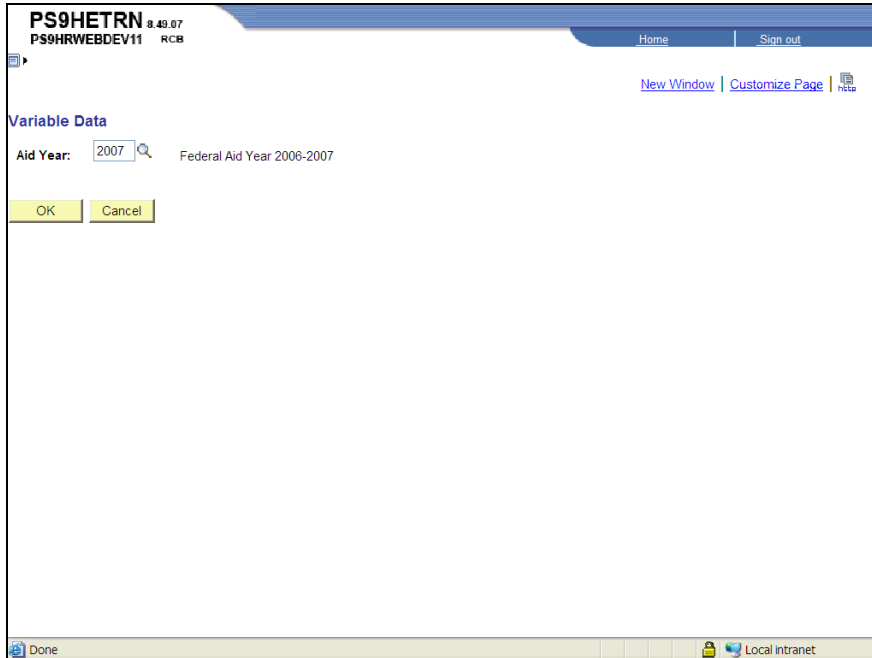
Look Up Clear Cancel [Basic Lookup](#)

Search Results
View All First 1 1-6 of 6 Last

Aid Year
2008
2007
2006
2005
2004
2003

Local intranet


| Step | Action |
|------|---|
| 23. | Click an entry in the Aid Year column. <div data-bbox="440 329 509 369" data-label="Text"> <div>2007</div> </div> |



| Step | Action |
|------|---|
| 24. | Click the OK button. <div data-bbox="440 1222 618 1283" data-label="Text"> <div>OK</div> </div> |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | 

Checklist Management 1 | **Checklist Management 2**

Jane Doe ID: 000000

Checklist Date Time: 08/22/2008 2:53:59PM [Variable Data](#)

*Administrative Function: FINA Financial Aid

*Academic Institution: LSUHSC - New Orleans

*Checklist Code: FAREQ Financial Aid Requirements-NO

*Status: Initiated Status Date: 08/22/2008

Due Date: 01/01/2008

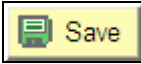
Due Amount: 100.00 USD Currency Code

Comments: Adding test comments to Checklist Management

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

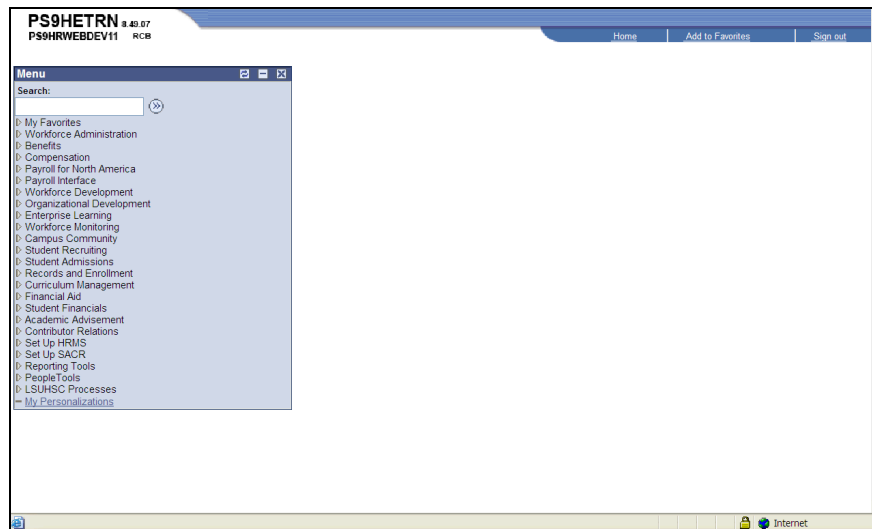
[Checklist Management 1](#) | [Checklist Management 2](#)

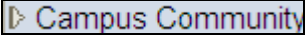
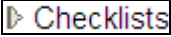
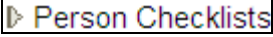

Done Local Intranet

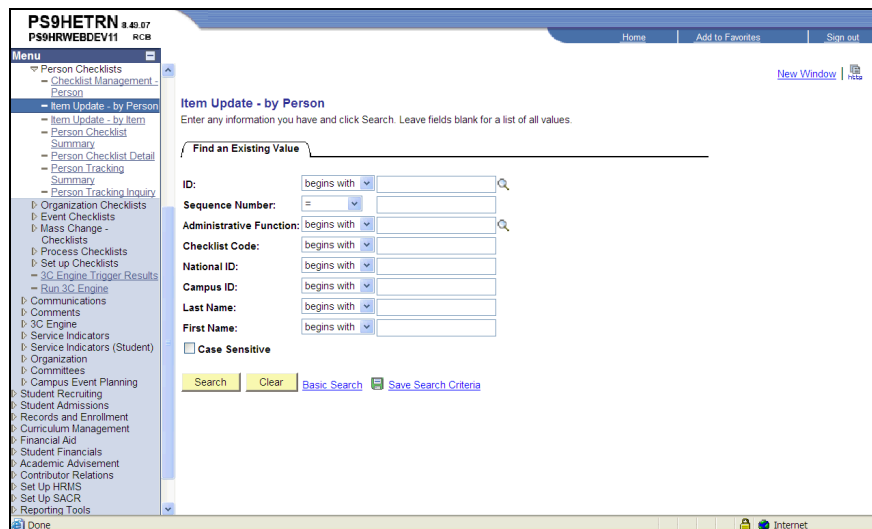
| Step | Action |
|------|--|
| 25. | Click the Save button.  |
| 26. | End of Procedure. |

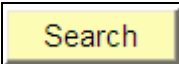
How to Update a Checklist Procedure

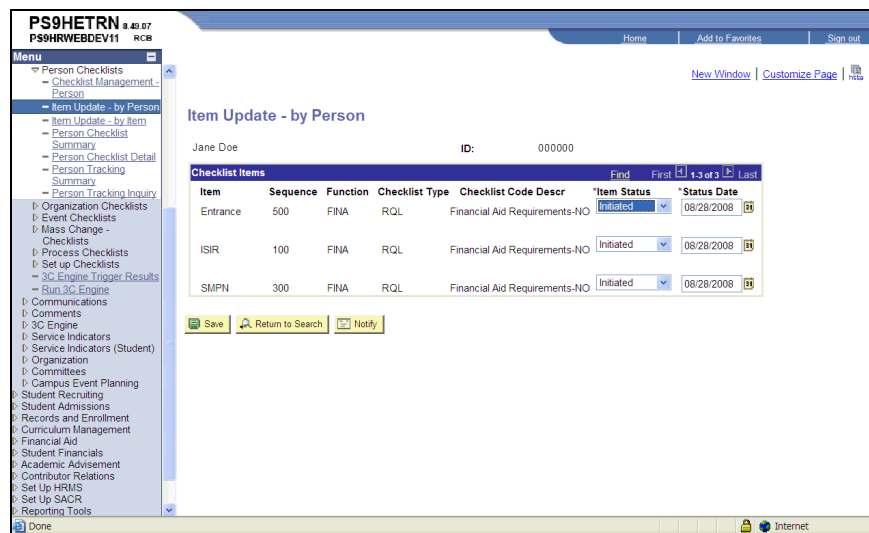
In this topic you will learn how to update a Checklist.


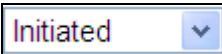
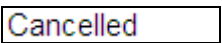
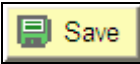


| Step | Action |
|------|---|
| 1. | Click the Campus Community link.  |
| 2. | Click the Checklists link.  |
| 3. | Click the Person Checklists link.  |
| 4. | Click the Item Update - by Person link.  |



| Step | Action |
|------|--|
| 5. | Enter the desired information into the ID field. Enter " 0000000 ". |
| 6. | Click the Search button.  |






| Step | Action |
|------|--|
| 7. | Click the Collapse (Ctrl+Y) Menu button.  |
| 8. | Click the Item Status list.  |
| 9. | Click the Cancelled list item.  |
| 10. | Click the Save button.  |
| 11. | End of Procedure. |

Comments Summary



Procedure

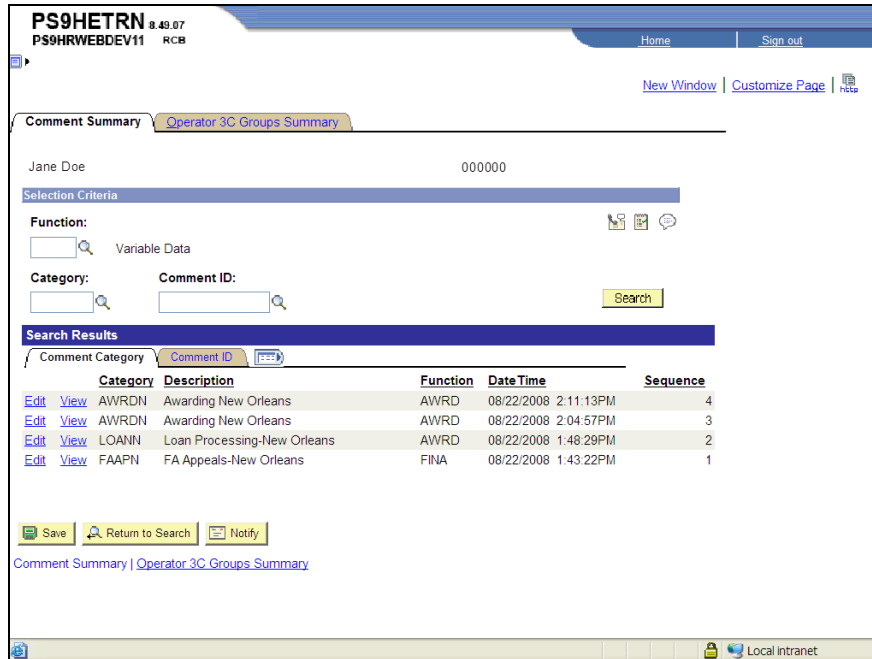
In this topic you will learn how to access the Comment Summary.



| Step | Action |
|------|--|
| 1. | Click the Records and Enrollment link.  Records and Enrollment |
| 2. | Click the 3 C's Summaries link.  3 C's Summaries |
| 3. | Click the Collapse (Ctrl+Y) Menu button.  |
| 4. | Click the Comment Summary link. Comment Summary |


| Step | Action |
|------|--|
| 5. | Enter the desired information into the ID field. Enter "0000000". |
| 6. | Click the Search button. |

| Step | Action |
|------|--|
| 7. | Click the Collapse (Ctrl+Y) Menu button.  |
| 8. | Click the Fetch button.  |



PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB


Home | Sign out


[New Window](#) | [Customize Page](#) | 

Comment Summary | **Operator 3C Groups Summary**


Jane Doe 000000

Selection Criteria


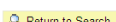
Function: Variable Data   

Category: Comment ID: 

Search Results

Comment Category: **Comment ID** 

| | Category | Description | Function | Date Time | Sequence |
|---|----------|-----------------------------|----------|----------------------|----------|
| Edit View | AWRDN | Awarding New Orleans | AWRD | 08/22/2008 2:11:13PM | 4 |
| Edit View | AWRDN | Awarding New Orleans | AWRD | 08/22/2008 2:04:57PM | 3 |
| Edit View | LOANN | Loan Processing-New Orleans | AWRD | 08/22/2008 1:48:29PM | 2 |
| Edit View | FAAPN | FA Appeals-New Orleans | FINA | 08/22/2008 1:43:22PM | 1 |

[Comment Summary](#) | [Operator 3C Groups Summary](#)

Local intranet

| Step | Action |
|------|-------------------------------------|
| 9. | Click the View link |

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Comment Summary | **Operator 3C Groups Summary**

Jane Doe 000000

Selection Criteria

Function: Variable Data

Category: Comment ID: [Search](#)

Search Results

| Comment Category | Comment ID | Category | Description | Function | Date Time | Sequence |
|----------------------|----------------------|----------|-----------------------------|----------|----------------------|----------|
| Edit | View | AWRDN | Awarding New Orleans | AWRD | 08/22/2008 2:11:13PM | 4 |
| Edit | View | AWRDN | Awarding New Orleans | AWRD | 08/22/2008 2:04:57PM | 3 |
| Edit | View | LOANN | Loan Processing-New Orleans | AWRD | 08/22/2008 1:48:29PM | 2 |
| Edit | View | FAAPN | FA Appeals-New Orleans | FINA | 08/22/2008 1:43:22PM | 1 |

[Save](#) [Return to Search](#) [Notify](#)

[Comment Summary](#) | [Operator 3C Groups Summary](#)

Local intranet

| Step | Action |
|------|---|
| 10. | Click the Edit link. Edit |

Person Comment Entry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://ps9hrweb.lsuhscc.edu/psp/hrtn_3/EMPLOYEE/HRMS/c/CREATE_COMMENTS.CMNT_ENTRY.GBL?Page=CMNT_ENTRY1&Actv

PS9HETRN 8.43.07
PS9HRWEBDEV11 RCB

Home | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Menu

- Comments - Person
 - Person Comment Entry
 - Person Comment Summary
 - Person Comment Detail
- Comments - Organization
 - Set Up Comments
 - 3C Engine Trigger Results
 - Run 3C Engine
- 3C Engine
 - Service Indicators
 - Service Indicators (Student)
- Organization
 - Committees
 - Campus Event Planning
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advisement
- Contributor Relations
- Set Up HRMS
- Set Up SACR

Person Comment Entry

Jane Doe 000000

Comment Date Time: 08/22/2008 2:11:13PM

*Administrative Function: AWARD

*Academic Institution: LSUHSC - New Orleans

*Comment Category: AWARD New Orleans

Comment Data


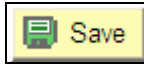
Comment ID: 0119363 Harold, Carmen P.

Department:

Comment Date: 08/22/2008

Local intranet

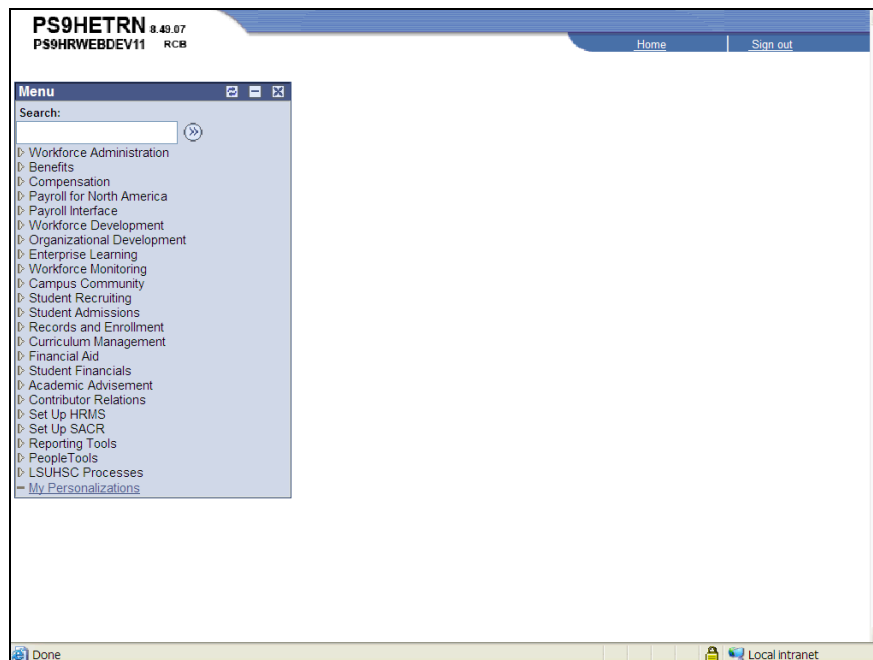
start PS Desktop - Cit... Comment Sum... Person Comme... 3:08 PM





| Step | Action |
|------|--|
| 11. | Click the Collapse (Ctrl+Y) Menu button.  |
| 12. | Click the Save button.  |
| 13. | End of Procedure. |

Communications Summary

Procedure

In this topic you will learn how to access Communications Summary.



| Step | Action |
|------|--|
| 1. | Click the Records and Enrollment link.  |
| 2. | Click the 3 C's Summaries link.  |
| 3. | Click the 3 C's Summaries link.  |
| 4. | Click the Communication Summary link.  |

PS9HETRN 8.49.07
PS9HRWEBDEV11 RCB

Home Sign out

[New Window](#) [Customize Page](#)

Menu

- Workforce Development
- Organizational Development
- Enterprise Learning
- Workforce Monitoring
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Enroll Students
- Student Term Information
- Career and Program Information
- Enrollment Summaries
- Term Processing
- Enrollment Reporting
- Enrollment Verifications
- Transcripts
- Graduation
- Transfer Credit Evaluation
- Transfer Credit Rules
- 3 C's Summaries
 - Comment Summary
 - Communication Summary**
 - Personal Checklist Summary
- Student Background Information
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advisement
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Reporting Tools
- PeopleTools
- LSUHSC Processes
- My Personalizations

Communication Summary **Operator 3C Groups Summary**

Jane Doe 0000000

Selection Criteria

Function
 Variable Data

Category **Method** **Direction** **Letter Code** **Status:**

All

Search Results

General Info **Letter Details**

| Process Used | Method | Letter Code | Direction | Function | Assign Date/Time | Date Complete |
|--------------|--------|-------------|-----------|----------|------------------|---------------|
| Edit | View | | | | | |

[Communication Summary](#) | [Operator 3C Groups Summary](#)

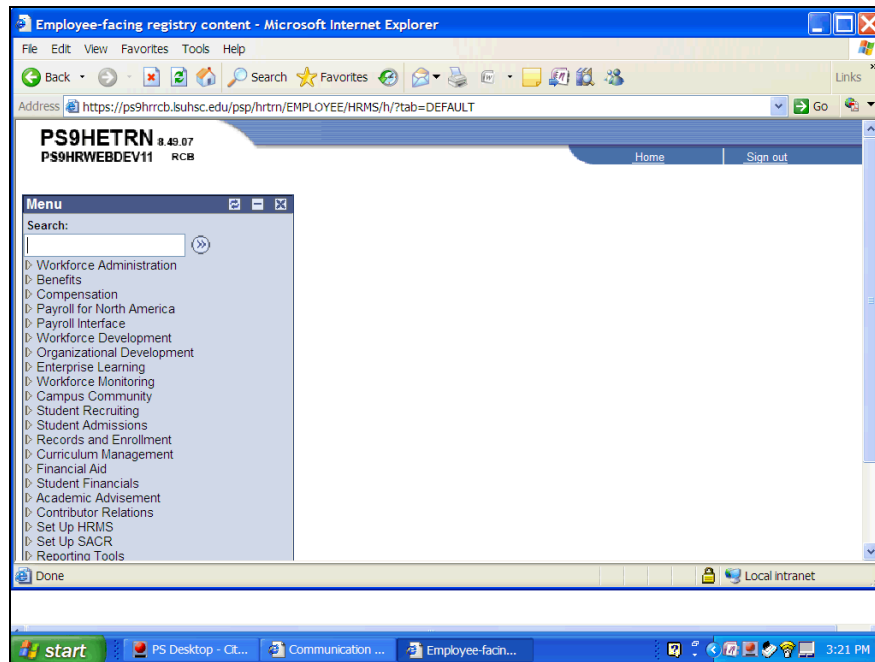
Local Intranet

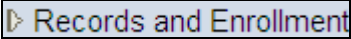
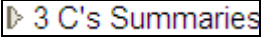

| Step | Action |
|------|---|
| 5. | Click the Collapse (Ctrl+Y) Menu button. |
| 6. | Click the Fetch button. |
| 7. | Click the View or Edit link |
| 8. | End of Procedure. |

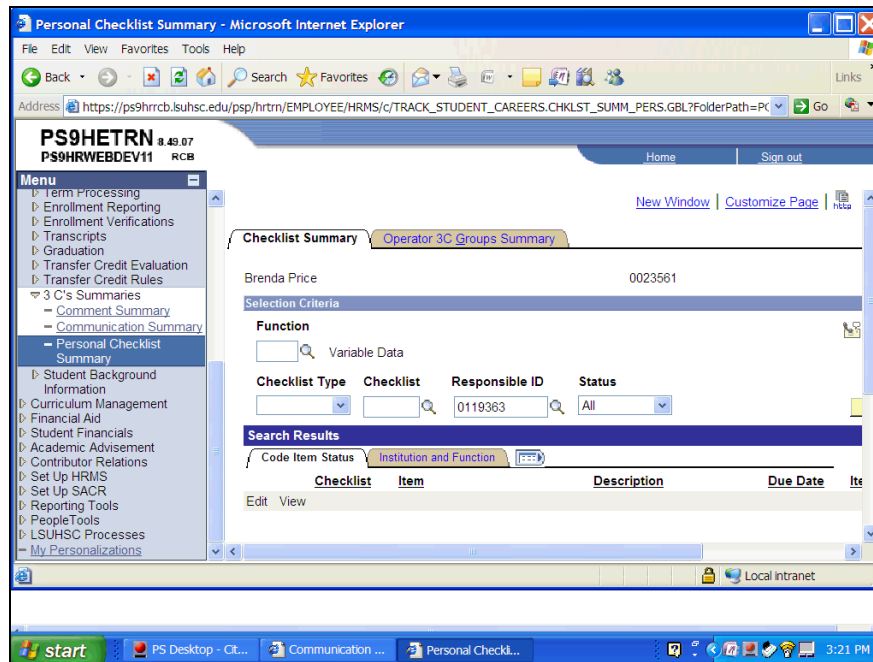
Checklist Summary




Procedure

In this topic you will learn how to access Checklist Summary.



| Step | Action |
|------|--|
| 1. | Click the Records and Enrollment link.  |
| 2. | Click the 3 C's Summaries link.  |
| 3. | Click the Personal Checklist Summary link.  |

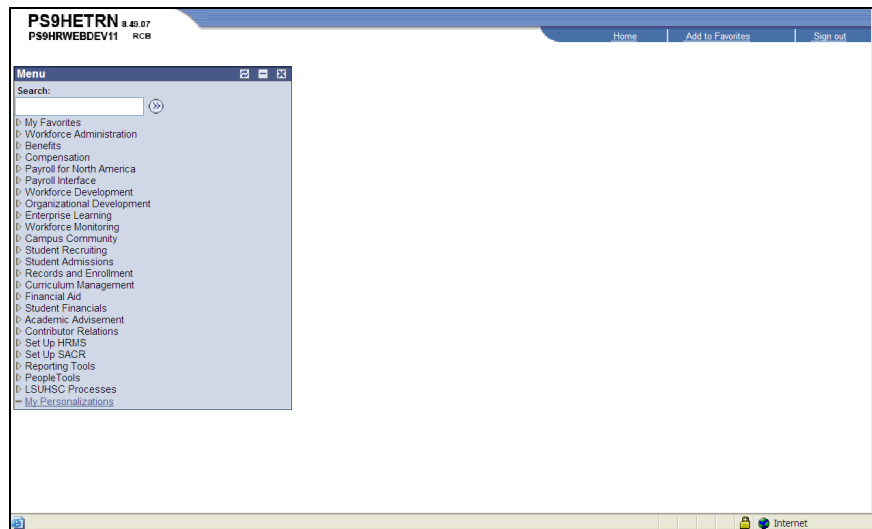


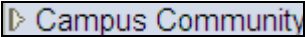
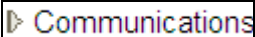

| Step | Action |
|------|--|
| 4. | Click the Collapse (Ctrl+Y) Menu button.  |
| 5. | Click the Search button.  |
| 6. | Click the View link.  |
| 7. | End of Procedure. |

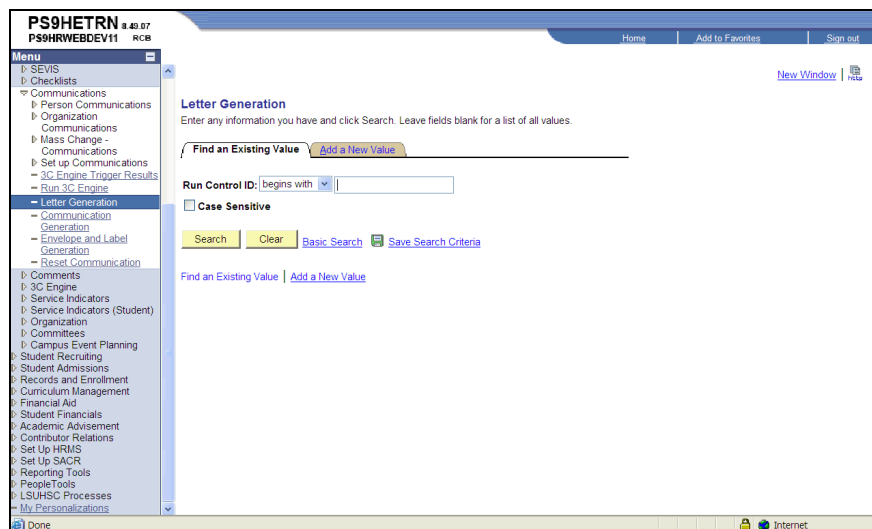
Letter Generation Process

Procedure

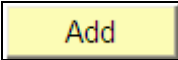
In this topic you will learn how to use the Letter Generation Process.

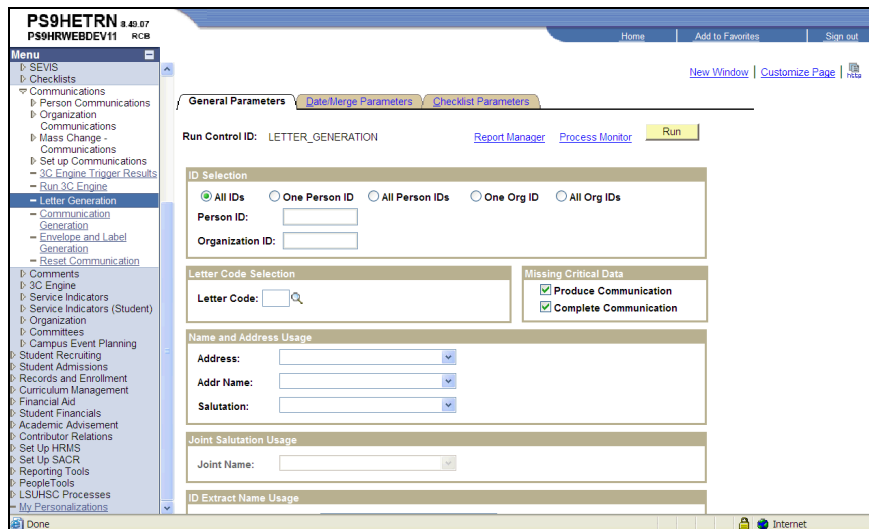



| Step | Action |
|------|---|
| 1. | Click the Campus Community link.  |
| 2. | Click the Communications link.  |
| 3. | Click the Letter Generation link.  |



| Step | Action |
|------|--|
| 4. | Enter the desired information into the Run Control ID field. Enter "LETTER_GENERATION" . |

| Step | Action |
|------|---|
| 5. | Click the Add button.  |



| Step | Action |
|------|---|
| 6. | Click lookup  |
| 7. | Click an entry in the Description column. Note: Use Letter code FA1 (New Orleans Missing Information) or FA2 (Shreveport Missing Information) FA Missing Info Letter-NO |

PS9HETRN 4.03.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

General Parameters Date/Merge Parameters Checklist Parameters

Run Control ID: LETTER_GENERATION Report Manager Process Monitor Run

ID Selection

☒ All IDs ☐ One Person ID ☐ All Person IDs ☐ One Org ID ☐ All Org IDs

Person ID:

Organization ID:

Letter Code Selection

Letter Code: FA1 FA Missing Info Letter-NO

Missing Critical Data

☒ Produce Communication

☒ Complete Communication

Name and Address Usage

Address: Financial Aid Letters

Addr Name: Primary Full



Salutation: Primary Full

Joint Salutation Usage

Joint Name:

ID Extract Name Usage

Done

| Step | Action |
|------|--|
| 8. | Click the Address list.  |
| 9. | Click the Addr Name list.  |
| 10. | Click the Salutation list.  |

PS9HETRN 4.03.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

General Parameters Date/Merge Parameters Checklist Parameters

Run Control ID: LETTER_GENERATION Report Manager Process Monitor Run

ID Selection

☒ All IDs ☐ One Person ID ☐ All Person IDs ☐ One Org ID ☐ All Org IDs

Person ID:

Organization ID:

Letter Code Selection

Letter Code: FA1 FA Missing Info Letter-NO

Missing Critical Data

☒ Produce Communication

☒ Complete Communication

Name and Address Usage

Address: Financial Aid Letters

Addr Name: Primary Full


Salutation: Primary Full

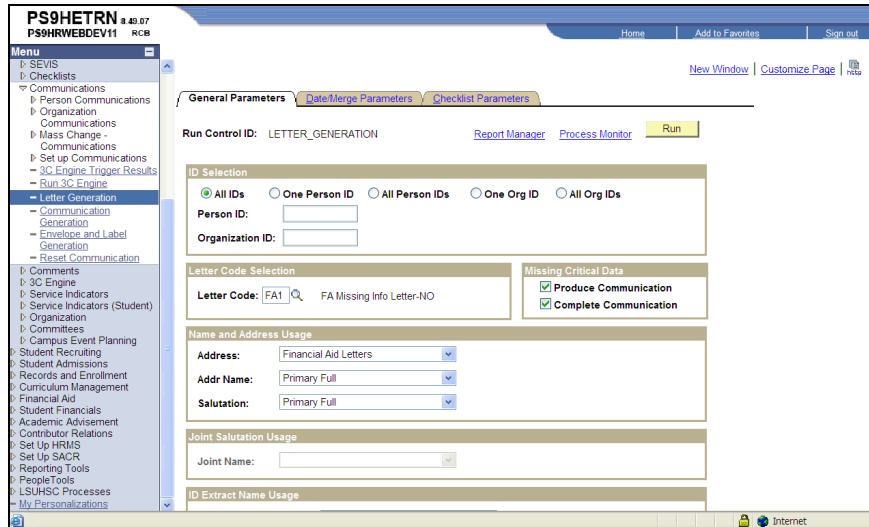
Joint Salutation Usage


Joint Name:

ID Extract Name Usage

Done



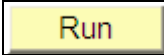
| Step | Action |
|------|--|
| 11. | Select Primary Full from the drop-down list.  |

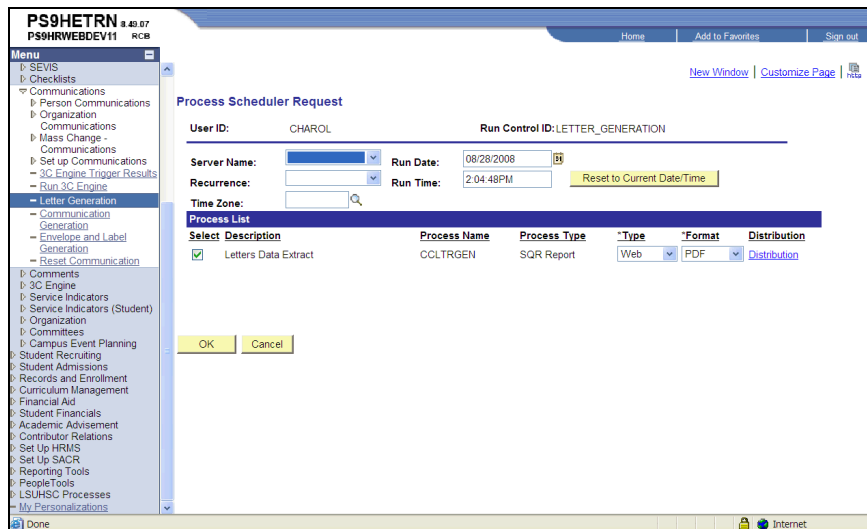




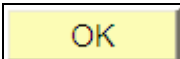
| Step | Action |
|------|--|
| 12. | Click the Date/Merge Parameters tab.  |
| 13. | <p>Note: The Letter Generation process is run to extract data for the letter that was assigned to students on the Person Communications Management page. When you run the Letter Generation process it will produce an extract file based on the parameters you selected. You must tell the system where to put the extract file.</p> <p>The location of where to put the extract file will vary depending upon what database you're working in and what campus you're on.</p> <p>Financial Aid users on each campus have their own set of folders for each database they work in.</p> <p>For example: a Shreveport Financial Aid user working in PS9HEPRD would put the communication extract file here: \\ps9hetux6\hrsa\$\PS9HEPRD\SA\FinAid\Shreveport\Temp</p> <p>Before running the Letter Generation process make sure you know where your extract file will reside for your campus.</p> |

| Step | Action |
|------|--|
| 14. | <p>Note: The Extract File Path provided in this exercise is for training purposes only. This is not a valid path and should not be used in production.</p> <p>Please contact FA management to get the correct path for your extract file.</p> |

| Step | Action |
|------|--|
| 15. | <p>Click the Checklist Parameters link.</p> <p>Checklist Parameters</p> |

| Step | Action |
|------|--|
| 16. | Click the Checklist Type list.  |
| 17. | Select the Communication List from the Checklist Type drop-down.  |
| 18. | Click the Run button.  |



| Step | Action |
|------|---|
| 19. | Click the Server Name list.  |
| 20. | Click the PSNT list item.  |
| 21. | Click the OK button.  |

PS9HETRN 4.03.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

General Parameters Data/Merge Parameters Checklist Parameters

Run Control ID: LETTER_GENERATION Report Manager Process Monitor Run

Process Instance: 763776

Checklist Type: Communication List

Tracking Group:

Checklist Code:

Tracking Group Status

☒ Initiated ☐ Completed

Checklist Status

☒ Initiated ☐ Completed

Item Status

☒ Initiated ☐ Completed ☐ Waived ☒ Notified ☒ Second Notification

Save Notify Add Update/Display

General Parameters Data/Merge Parameters Checklist Parameters

Process Instance: 763776

| Step | Action |
|------|---|
| 22. | Click the Process Monitor link. Process Monitor |

PS9HETRN 4.03.07
PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

Process List Server List

View Process Request For

User ID: CHAROL Type: SQR Report Last: 1 Days Refresh

Server: Name: Instance: to

Run Distribution Status: Save On Refresh

Process List

| Select | Instance | Seq | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details |
|--------------------------|----------|-----|--------------|-----------------|--------|--------------------------|------------|---------------------|-------------------------|
| <input type="checkbox"/> | 763776 | | SQR Report | CCLTRGEN CHAROL | CHAROL | 08/28/2008 2:04:48PM CDT | Initiated | N/A | Details |
| <input type="checkbox"/> | 763775 | | SQR Report | CCLTRGEN CHAROL | CHAROL | 08/28/2008 1:42:04PM CDT | Success | Posted | Details |

Go back to Letter Generation

Save Notify

Process List Server List

Process Instance: 763776

| Step | Action |
|------|---|
| 23. | Click the Refresh button until the Run Status = Success and Distribution Status = Posted Refresh |
| 24. | Click the Go back to Letter Generation link when the Run Status = Success and the Distribution Status=Posted Go back to Letter Generation |

PS9HETRN PS9HRWEBDEV11 RCB

Home Add to Favorites Sign out

New Window Customize Page

General Parameters Date/Merge Parameters Checklist Parameters

Run Control ID: LETTER_GENERATION Report Manager Process Monitor Run

Checklist Type: Communication List

Tracking Group:

Checklist Code:

Tracking Group Status

☒ Initiated ☐ Completed

Checklist Status

☒ Initiated ☐ Completed

Item Status

☒ Initiated ☐ Completed ☐ Waived ☒ Notified ☒ Second Notification

Save Return to Search Notify Add Update Display

General Parameters | Date/Merge Parameters | Checklist Parameters

Process Instance: 763776

| Step | Action |
|------|---|
| 25. | Click the Report Manager link. <u>Report Manager</u> |
| 26. | Click the <u>Letters Data Extract</u> Report to view Letters. |
| 27. | This completes the Letter Generation topic. End of Procedure. |