



CampusVue

Financial Aid

User Guide

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Preface

This document contains information about how to administer students' financial aid activities using CampusVue.

This document assumes that the reader knows the Windows environment, has used the CampusVue product, and understands basic school administration terminology.

Related References

Refer to the following references for more information about topics frequently discussed in this document.

Related Reference	Description
Help System	Describes how to use the CampusVue product.

Document Conventions

The following conventions are used throughout the documentation to help guide the reader in finding information quickly.

Convention	Use
BOLD	Names of files, keys, forms, paths, and program components
<i>Italics</i>	Titles, hyperlinks, and special terms
>	Symbol used in paths to signify a shift to the next level of options
Note:	Important information

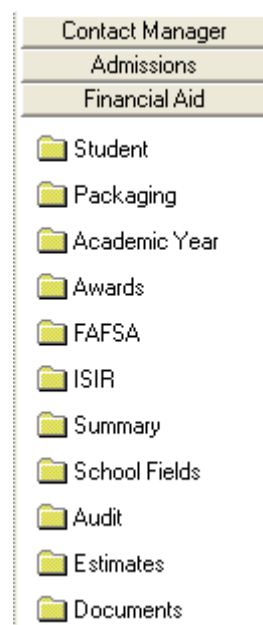
Introduction to Financial Aid in CampusVue

The Financial Aid module of CampusVue provides mechanisms for gathering and recording information about student financial aid eligibility, packaging, fund sources, disbursements, student payment plans, and importing/exporting data used by external processors. As an adjunct to these processes, your management can obtain valuable data about Financial Aid departmental performance.

The purpose of this Financial Aid user guide is to familiarize you with the basic Financial Aid tasks you can perform using CampusVue.

Financial Aid Folders

Under the **Financial Aid** tab on the Student Bar, there are folders in which you can view and edit Financial Aid information:



Each folder contains a form that displays information associated with the student whose name appears in the Recent Students box. Click on a folder to open it and view the information it contains. Many forms have additional layers that allow you to “drill down” to finer levels of detail on the folder topic.

Each of these folders is discussed below.

Student Folder

The Student folder opens to the **Student Master** form. Details on editing the Student Master form can be found in the *Basic Navigation* user guide.

Packaging Folder

The Packaging folder contains the **Financial Aid Packaging** form with all the information and mechanisms required for students to pay for their postsecondary education. Use it to document available fund sources and perform the processing required to schedule and disburse those funds.

Enrollment	Start Date	Campus	Status
Bachelor of Arts	6/2/2006	Campus Management Institute	Being Processed
Bachelor of Arts	6/2/2006	Campus Institute of Art	Future Risk
Bachelor of Arts	6/2/2006	Campus Institute of Art	Being Processed

Academic Year	Package Source	Orig Date	Disb Date	Award Year 1	Award Year 2
7/21/2006	Cash		Not Billed	2004-05	

Academic Year Folder

The Academic Year folder contains the **Financial Aid Academic Year** form with all the information regarding financial aid packages for the academic years in the student's program of study.

Financial Aid Academic Year - Smith, John

Academic Year: 1 Grade Level: 1st year, attended college before Start Date: 1/5/2007 End Date: 8/3/2007

Dependency Status: Undetermined First Time Borrower: No Housing: With Parent

Weeks In Academic Year: 30.0 Months In Academic Year: 9.0 Award Year 1: 2006-07 Award Year 2: 2006-07

Credits Exp to Complete: 0.00 Credits In Academic Year: 0.00 Academic Year Definition: 30 Week Academic Year

Weeks / Non-Enroll: 22.0 Weeks Enrolled in Acad Yr: 30

Financial Aid Advisor: Joe Tester FA Entrance Interview: Rights Responsibilities Ack: ☐

Budget

Financial Management: Calculate

Tuition: 6,000.00 Books/Supplies: 1,200.00 Room/Board: 3,600.00 Travel: 1,200.00 Bank Fees: 0.00

Total Budget: 13,200.00 Institutional: 8,400.00

Other Charges

Amount	Institutional
Internet Services: 1,200.00	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Award Year 1 Packaging Status: Not Packaged Award Year 2 Packaging Status:

Package Date: Packaged To Status: Full Time

☐ Package Revised Enroll Status: Full Time

Award Notice Printed: Print

Award Notice Signed:

Package Save Cancel Done

Note: The Academic Year form is one of the forms that can be configured for field-level security, in order to protect information that is either sensitive or critical to consistent business practices. If field-level security is enabled for a form, you may find that you have access to some fields and not others. Your user permissions will determine which fields in the form you can see and/or edit.

Awards Folder

The Awards folder contains the **Financial Aid Packaging** form ready to be populated with the selected student's information. The form displays awards that have been previously entered and saved, and may also display information about student eligibility.

Financial Aid Packaging - Student: John Smith

Academic Year: 2 Award Name: CMCNY Award Type: 2007-08 Award Amount: 375.00 Award Status: Approved

Award Name	Award Type	Award Amount	Award Status
CMCNY	2007-08	375.00	Approved

ETL Unavailable: ☐ Full Paid ETL: ☐ ETL Amount: IRA Amount: FAFSA Amount:

Save Cancel Done

Double-click an award to see additional detail about the award. The form that opens will be specific to the fund source.

For example, double-click a grant to see grant details:

Financial Aid ACG Grant - Acker, Bill

Award Year: 2007-08 ACG Grant Status: E Estimated

Amount: 1,000.00 Enroll Date: 7/1/2007

Origination Amount: 1,000.00 ACG Payment Reason Code: 01 Rigorous High School Program

Origination Status: Not Ready to Send Rigorous School Code: FL0001

Student Level: Academic year 1 (Never Attended befo)

Origination Batch ID: Comment Codes:

Scheduled Disbursements Rcvd & Refunds/Stipends Comments

Disb #	Exp Date	Acad Year	Term	Exp Amount	Status
1	3/8/2008	2	S2008	500.00	Scheduled
2	6/9/2008	2	2008SUK	500.00	Scheduled

Add Delete Cancel Calculate

Save Cancel Close

Double-click a student loan to display loan details:

Financial Aid Direct Loan - Jones, Mike E Fund Source: DIRSUB

Award Year: 2002-03 Lender: DE Department of Education Loan Period Start: 1/6/2003

Gross Amount: 4,500.00 Servicer: DE Department of Education Loan Period End: 8/10/2003

Bank Fees: 134.00 Guarantor: DE Department of Education Orig. Extract Sent:

Net Amount: 4,500.00 Status: Orig. Ack. Date:

Rebate Amt: 134.00 Grade Lvl: 0 Origin Status: Ready to send to COD

Loan ID: 538940075503G12345001 Orig Fee %: 3.00 Int Rebate %: 3.00

Origination Batch ID: Reject Codes:

Disbursements Rcvd Refund/Stipend Borrower/Stud. Info Prom Note Info Comments

Disb#	Date	Acad Year	Term	Net Amount	Disb %	Fee	Rebate	Status
1	1/6/2003	1		2,250.00	50	67.00	67.00	Scheduled
2	4/24/2003	1		2,250.00	50	67.00	67.00	Scheduled
3	1/6/2003	1		2,250.00	50	67.00	67.00	Canceled
4	4/24/2003	1		2,250.00	50	67.00	67.00	Canceled
5	1/6/2003	1		2,250.00	50	67.00	67.00	Canceled
6	4/24/2003	1		2,250.00	50	67.00	67.00	Canceled

Add Disbursement Delete Disbursement

Cancel Disbursement Recalculate Disb Amounts

Save Cancel Close

Double-click a student or agency payment plan to see plan details:

F/A Student Cash Payment/Other - Acker, Bill

☐ Student Payment Agency:

☒ Agency Payment Agency Branch:

Total Amount: Status: Approved

☒ # of Payments: ☐ Payment Amount:

 Interest Rate:

First Payment Date:

 Payment Frequency: ☒ Monthly ☐ Days:

Secondary Rate:

 Effective Date:

 Interest Only Until:

Scheduled Payments Payments Received Refunds Auto Draft Comments

Calculate Payment Amount: Last Payment Date: Add Payment Delete Payment

Date	Acad Year	Term	Payment	Principal	Interest	Balance	Status
1/1/1999	2		125.00	125.00	0.00	250.00	S
2/1/1999	1		125.00	125.00	0.00	125.00	S
3/1/1999	1		125.00	125.00	0.00	0.00	S

Cancel Payment Specify Ac Yr Seq Totals Payment: Principal: Interest: Unpaid Balance:

View Statement History Save Cancel Close

FAFSA Folder

The FAFSA folder opens to the **FAFSA Main Form**, which gives you access to existing FAFSAs and also allows you to enter a new FAFSA.

FAFSA Main Form

Student: Search

FAFSAs On File

Award Year	Status	CPS Status	Date
2002-03	T	A	
2006-07	N	N	

Award Year:

 Add Edit Delete Print

Close

For more about FAFSAs, see the section entitled *The FAFSA*.

ISIR Folder

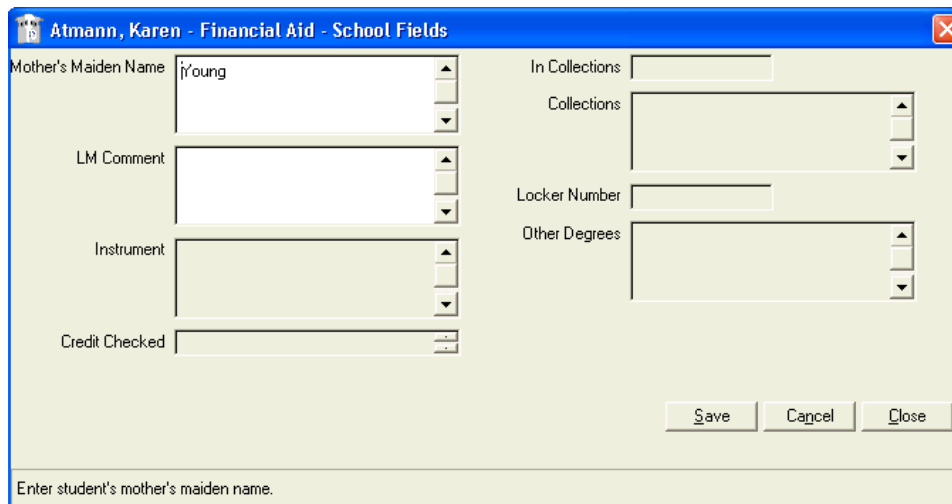
The ISIR folder contains the **ISIRs Received** form which lists imported ISIR files returned from the Department of Education.

Summary Folder

The Summary folder contains the **Financial Aid Summary** form. It summarizes basic student demographic data and summary information about the student's enrollment, packaging, and disbursements gathered from other parts of the student record.

School Fields Folder

The School Fields folder contains the **School Fields** form. The form contains customized fields that may have been created in Setup to capture student information items not recorded elsewhere in CampusVue.



Atmann, Karen - Financial Aid - School Fields

Mother's Maiden Name: Young

LM Comment:

Instrument:

Credit Checked:

In Collections:

Collections:

Locker Number:

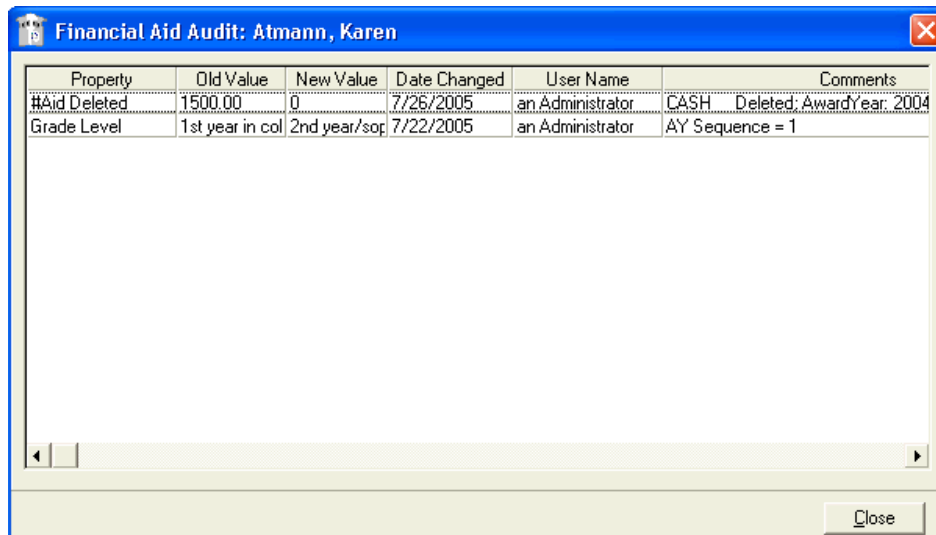
Other Degrees:

Save Cancel Close

Enter student's mother's maiden name.

Audit Folder

The Audit folder contains the **Financial Aid Audit** form. The form displays a log of changes to financial aid awards, whether by in-house users or data imports from servicers.



Financial Aid Audit: Atmann, Karen

Property	Old Value	New Value	Date Changed	User Name	Comments
#Aid Deleted	1500.00	0	7/26/2005	an Administrator	CASH Deleted; Award Year: 2004
Grade Level	1st year in col	2nd year/soc	7/22/2005	an Administrator	AY Sequence = 1

Close

Estimates Folder

The Estimates folder contains the **FA Estimates** form ready to be populated with the selected student's information, and any Estimates that have been previously entered and saved.

FA Estimates - Atmann, Karen

Program Version [dropdown] Beginning Award Year [dropdown]

Total Program COA [0.00] Enrollment Status [dropdown]
 Start Date Code [dropdown] Start Date [6/2/2005]
 Housing Status [On Campus] Dependency Status [Dependent]
 Grade Level [dropdown] First Time Borrower [checkbox] Year Sequence [All]

Estimated EFC

Student Info
 Marital Status: ☐ Married ☒ Not Married
 Income [0.00] Legal State [FL]
 Exemptions [] Num Family [1]
 Tax [0.00] Num College []

Parent Info
 Marital Status: ☐ Married ☒ Not Married
 Income [0.00] Legal State []
 Exemptions [] Num Family [2]
 Tax [0.00] Num College [1]

Calculate
 Calculate EFC Estimated EFC Beginning Award Year: [0.00]
 Calculate PELL Estimated Pell Eligibility: [0.00]

Estimate EFC and Pell Amount are calculated based on award year 2005-06 for award years beyond 2005-06

[Load JSIR Data] [Estimate Awards] [Reset] [Save] [Cancel] [Close]

Documents Folder

The Documents folder contains the **FA Document Tracking** form that allows you to attach single documents and document lists to a student's record. Use this form to track the status of each document and whether it is on file or still missing.

FA Document Tracking: Atmann, Karen

Unique Student ID: 13749 SSN: 805-58-5555
Student #: 13749 2004-05 Completion Date:

Award Year: 2004-05 Add Document List Add Document

Document	Source	Status	Requested	Approved	Received	Date D
FAFSA	FA	Requested - Required	6/1/2005			6/1/2005
FAFSA	FA	Requested - Required	6/1/2005			6/1/2005
FAFSA	FA	Requested - Required	6/1/2005			6/1/2005
FAFSA	FA	Requested - Required	6/2/2005			6/2/2005

Display Document Audit Edit Delete

Document Detail

ISIR Details

ISIR ID	Date Received	EFC	Pell Elig	Verification	Verification Complete

ISIR Codes

Code Type	Codes	Comments

Print ISIR Save Cancel Close

The FAFSA

Students seeking financial aid from the U.S. Department of Education are required to file the Free Application for Federal Student Aid (FAFSA). The information on the FAFSA form and the cost of attendance data from the school determine the financial need of the student applicant. Using the FAFSA data, you can also derive the student's expected family contribution (EFC). The EFC is that portion of the student's cost of attendance that must be provided by the student's family.

This topic provides information on how to add and edit FAFSA information for students. It also includes information on how to produce a hypothetical FAFSA. CampusVue provides an electronic copy of the printed FAFSA application form.

Adding a New FAFSA

Select the student whose FAFSA you wish to enter.

- 1 Select **View > Financial Aid > FAFSA** to open the FAFSA Main Form.

The screenshot shows a web application window titled "FAFSA Main Form". At the top, there is a search bar labeled "Student" with the text "Jones, Mike - 265" and a "Search" button. Below this is a section titled "FAFSAs On File". It contains a table with the following data:

Award Year	Status	CPS Status	Date
2002-03	T	A	

To the right of the table is a dropdown menu for "Award Year" currently set to "2006-07". Below the table and dropdown are four buttons: "Add", "Edit", "Delete", and "Print". A mouse cursor is pointing at the "Add" button. At the bottom right of the window is a "Close" button.

- 2 Select the Award Year for which you wish to enter the new FAFSA. Click **Add** to open the FAFSA Data Entry form.

FAFSA 2007-08 Data Entry: Smith, John

Step 1: Student Information, questions 1-17

- Last Name:
- First Name:
- Middle Initial:
- Address:
- City:
- State:
- Zip:
- Social Security Number:
- Date of Birth:
- Permanent phone number:
- Driver's License #:
- Driver's License State:
- E-mail address:
- U.S. Citizen?
 - ☐ Yes, I am a U.S. citizen.....
 - ☐ No, but I am an eligible noncitizen.....
 - ☐ No, I am not a citizen or eligible noncitizen.
- Alien ID #:
- Marital status as of today?
 - ☐ Single, divorced, or widowed
 - ☐ Married/remarried
 - ☐ Separated
- Month and Year student was married, separated, divorced, or widowed, MM/YYYY:

Buttons:

Step 1: Questions 1-17 of the FAFSA form contain items of student personal information. Several fields are populated by information from the Student Master form. Enter any missing information by clicking each field. Click **Next** to advance to Questions 18-30.

Note: Changes made here will not update the Student Master except for the **Drivers License #** field. If the **Drivers License #** field is blank on the Student Master, it will be updated from the FAFSA. The Student Master must be updated separately for all other fields.

FAFSA 2007-08 Data Entry: Smith, John

Step 1: Student Information, questions 18-30

- What is your state of legal residence?
- Did you become a legal resident of this state before January 1, 2002? Yes ☐ No ☐
- If the answer to question 19 is "No", give month and year of legal residency.
- Most male students must register with Selective Service to get Federal Aid. Are you male? Yes ☐ No ☐
- If you are male (age 18-25) and not registered, do you want Selective Service to register you? Yes ☐ No ☐
- What degree or certificate will you be working on during 2007-2008?
- What will be your grade level when you begin the 2007-2008 school year?
- At the start of the 2007-2008 school year, what is your expected enrollment status?
- What types of student aid interest you?
- High School diploma or GED before enrollment? Yes ☐ No ☐
- First bachelor's degree before July 1, 2007? Yes ☐ No ☐
- Highest school your father completed?
- Highest school your mother completed?

Buttons:

- 3 Enter any missing information. Then click **Next** to advance to Questions 31 and Step 2: Questions 31-34 (tax information).

FAFSA 2007-08 Data Entry: Smith, John

Step 1: Student Information, question 31

31. Have you been convicted for the possession or sale of illegal drugs for an offense that occurred while you were receiving federal student aid (such as grants, loans, and work-study)?
If you have, answer "Yes", complete and submit this application, and we will send you a worksheet in the mail for you to determine if your conviction affects your eligibility for aid.

No ☐ Yes ☐

Step 2: Student Information, questions 32-34

32. For 2006, have you filed your IRS income tax return or tax return listed in question 33?
I have already completed my return ☐ I will file, but have not completed my return ☐ Not going to file ☐

33. What income tax return did you file or will file for 2006?

IRS 1040 ☐ A foreign tax return ☐
 IRS 1040A, 1040EZ ☐ Return for Puerto Rico, Guam, American Samoa, Virgin Islands, Marshall Islands, Federated States of Micronesia, or Palau ☐

34. If filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? Yes ☐ No ☐ Don't Know ☐

Cancel < Back Next > Calculate FAFSA

Enter required information and click **Next** to advance. If you want the FAFSA form to automatically calculate the taxes, enter the # of exemptions and tab through the fields. If the Work Sheets (A-C) are opened then you must enter numerical data in fields 40-42. Click **Next**.

FAFSA 2007-08 Data Entry: Smith, John

Step 2 - Student Information - questions 35 - 47

35. Your (and spouse's) adjusted gross income for 2006?

36. Enter total amount of your (and spouse's) income tax for 2006.

37. Enter your (and spouse's) number of exemptions for 2006.

38-39. How much did you (and spouse) earn from working in 2006? (Answer this question whether or not you filed a tax return)

38. Student 39. Spouse

40. Column from the left of Worksheet A Worksheet A

41. Column from the left of Worksheet B Worksheet B

42. Column from the left of Worksheet C Worksheet C

43. Total current balance of cash, savings, and checking accounts

44. Current net worth of investments

45. Current net worth of business and/or investment farms?

46. If you receive veterans' education benefits, for how many months from July 1, 2007 through June 30, 2008 will you receive these benefits? 47. Amount per month?

Cancel < Back Next > Calculate FAFSA

Step 3: Questions 48-55 contain additional items relating to eligibility. Click **Next** to advance.

FAFSA 2007-08 Data Entry: Smith, John

Step 3 - Student information - questions 48 - 55

48. Born before January 1, 1984? Yes ☐ No ☒

49. Will be working on a master's or doctorate program during the school year 2007-2008? Yes ☐ No ☐

50. As of today, are you married? (Answer yes if you are separated, but not divorced.) Yes ☐ No ☒

51. Do you have children who receive more than half of their support from you? Yes ☐ No ☐

52. Do you have dependents (other than your children or spouse) who live with you and receive more than half of their support from you, now and through June 30, 2008? Yes ☐ No ☐

53. Are (a) both of your parents deceased, or (b) are you (or were until age 18) a ward/dependent of the court? Yes ☐ No ☐

54. Currently on active duty in the U.S. Armed Forces for purposes other than training? Yes ☐ No ☐

55. Veteran of the U.S. Armed forces? Yes ☐ No ☐

Cancel < Back Next > Calculate FAFSA

Step 4: Questions 56-89 of the FAFSA form contain parent information. Answer these items if the student has a **Dependent** status. Click **Next** to advance.

FAFSA 2007-08 Data Entry: Smith, John

Step 4: Parent Information, questions 56 - 78

☐ Skip Parent Information (FAA will override dependency)

56. Parents marital status as of today? 57. Month and year they were married, separated, divorced, or widowed

SSN Last Name First Initial Date of Birth

58-61 Father's

62-65 Mother's

66. How many people in parents' household? 67. How many in question 66 will be college students between July 1, 2007 and June 30, 2008?

68. Parents' state of legal residence? 69. Did parents become legal residents of the state in question 68 before Jan. 1, 2002? Yes ☐ No ☐ 70. If question 69 is "No", enter month/year for the parent who has been a legal resident the longest.

71-75 In 2006, did you, your parents, or anyone in your parents' household (from question 66) receive any of the following benefits? (Select all that apply)

SSI ☐ Food Stamps ☐ Free Lunch ☐ TANF ☐ WIC ☐

76. For 2006, have parents completed their IRS income tax return or a tax return listed in question 77? Parents have filed ☐ Parent will file ☐ Parents not going to file ☐

77. What income tax return did the parents file or will file in 2006? A tax return with Puerto Rico, US Territory, or freely associated State ☐

IRS 1040 ☐ IRS 1040A, 1040EZ ☐ A foreign tax return ☐

78. If your parents filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? Yes ☐ No ☐ Don't Know ☐

Cancel < Back Next > Calculate FAFSA

FAFSA 2007-08 Data Entry: Smith, John

Step 4: Parent Information, questions 79 - 89

79. Parents' adjusted gross income for 2006?

80. Enter parents' total amount of income tax for 2006

81. Enter parents' number of exemptions for 2006

82-83. How much did your parents earn from working in 2006? (Answer this question whether or not your parents filed a tax return)

82. Father/Stepfather

83. Mother/Stepmother

84. Enter parent total column on the right of Worksheet A

85. Enter parent total column on the right of Worksheet B

86. Enter parent total column on the right of Worksheet C

87. Total current balance of cash, savings, and checking accounts?

88. Current net worth of investments:

89. Current net worth of business and/or investment farms?

Cancel < Back Next > Calculate FAFSA

Note: If the selected student does not hold a "Dependent" status, the Step 4 screen will not appear. Instead, clicking Next on the Step 3 screen will display the Step 5 screen.

Step 5: Questions 90-96 of the FAFSA form contain household information. If this screen is present fill out the information and click **Next** to advance.

FAFSA 2007-08 Data Entry: Smith, John

Step 5: Student Information, questions 90 - 96

90. How many people are in your (and your spouse's) household?

91. How many in question 90 will be college students between July 1, 2007 and, June 30, 2008?

92-96. In 2006, did you (or your spouse) or anyone in your household (from question 90) receive any of the following benefits? (Select all that apply)

SSI ☐ Food Stamps ☐ Free Lunch ☐ TANF ☐ WIC ☐

Cancel < Back Next > Calculate FAFSA

Step 6: Question 97 asks for school information for return of the ISIR. Fill in the housing information, if applicable. Click **Next** to advance.

The screenshot shows the FAFSA 2007-08 Data Entry window for Smith, John. The title bar reads "FAFSA 2007-08 Data Entry: Smith, John". The main window title is "Step 6: Student Information, questions 97(a) - 97(l)". The form contains several input fields and radio buttons. The first row is for question 97(a), with a "Fed school code" dropdown set to "012345", and empty fields for "Name of college", "College street address & city", and "State". To the right of these fields are radio buttons for "Housing Plans" with options: (b) on campus, off campus, with parent. Below this are rows (c) through (k), each with similar input fields and housing plan radio buttons. At the bottom of the window are four buttons: "Cancel", "< Back", "Next >", and "Calculate FAFSA".

Step 7: Questions 98-102 contain Signature and Date information.

The screenshot shows the FAFSA 2007-08 Data Entry window for Smith, John. The title bar reads "FAFSA 2007-08 Data Entry: Smith, John". The main window title is "Step 7: Signature and Date information, questions 98 - 102". The form contains several input fields and radio buttons. Question 98 is "Date this form was completed." with a date dropdown. Question 99 is "Student signature." with "Yes" and "No" radio buttons. Below it is "Parent signature." with "Yes" and "No" radio buttons. Question 100 is "Preparer's Social Security #:" with a text input field. Question 101 is "Employer ID Number:" with a text input field. Question 102 is "Preparer's Signature & Date:" with "Yes" and "No" radio buttons. At the bottom of the window are four buttons: "Cancel", "< Back", "Next >", and "Calculate FAFSA".

4 Click **Calculate FAFSA** to see FAFSA results and adjust as required.

FAFSA Results - Smith, John

Award Year: 2007-08 FISAP Income: 1210

Model: Independent * Parent's Contribution: 0

Primary EFC: 0 Reject Code:

Secondary EFC: 0 Auto 0 EFC: No

Alternate EFCs		
EFC	Primary	Secondary
EFC1	0	0
EFC2	0	0
EFC3	0	0
EFC4	0	0
EFC5	0	0
EFC6	0	0
EFC7	0	0
EFC8	0	0
EFC10	0	0
EFC11	0	0
EFC12	0	0

Assumptions

Override	Assumption Made

Recalculate

Model Override: ☒ Enrollment Status: Full Time

Use Secondary EFC: ☐ Estimated Pell Award: 4310 (est)

Override Reject: ☐

☐ FAFSA is ready to send

CPS Status:

Print FAFSA Edit FAFSA Save Cancel Close

- Click **Save** to save the FAFSA results, **Print FAFSA** to print a copy, and **Cancel** to cancel the FAFSA results.

IMPORTANT: Enable the **FAFSA is ready to send** check box if the FAFSA is ready to export.

Editing a FAFSA

To edit a FAFSA:

- Select the student whose FAFSA you wish to edit.
- Select **View > Financial Aid > FAFSA** to open the FAFSA Main Form.

FAFSA Main Form

Student: Jones, Mike - 265 Search

FAFSAs On File

Award Year	Status	CPS Status	Date
2002-03	T	A	
2006-07	N	N	

Award Year: 2006-07

Add Edit Delete Print

Close

- 3 Select a FAFSA from the **FAFSAs On File** list and click **Edit** to open the FAFSA Results form for the selected student.

FAFSA Results - Jones, Mike E

Award Year	2006-07	FISAP Income	1210
Model	Independent	Parent's Contribution	0
Primary EFC	0	Reject Code	
Secondary EFC	0	Auto 0 EFC	No

Alternate EFCs		
EFC	Primary	Secondary
EFC1	0	0
EFC2	0	0
EFC3	0	0
EFC4	0	0
EFC5	0	0
EFC6	0	0
EFC7	0	0
EFC8	0	0
EFC10	0	0
EFC11	0	0
EFC12	0	0

Assumptions	
Override	Assumption Made

Model Override	<input type="checkbox"/>	Enrollment Status	Full Time
Use Secondary EFC	<input type="checkbox"/>	Estimated Pell Award	4050 (est)
Override Reject	<input type="checkbox"/>		

☐ **FAFSA is ready to send**

CPS Status: N

- 4 The form may open with the following question:

CampusVue

Would you like to recalculate the estimate pell amount?

- 5 Click **Yes** or **No** as required.
- 6 Click **Edit FAFSA** to open the FAFSA Data Entry form.
- 7 Click **Next** and **Back** to move through the form and edit as required.
- 8 Click **Calculate FAFSA** to see the modified FAFSA results, **Back** to return to a previous page of the form, or **Cancel** to undo any changes made to the FAFSA data entry.

Note: Updated FAFSA data is not written to the Student Master form except for the driver's license number. If the "DL #" field is empty on the Student Master, it will be updated from the FAFSA. The Student Master must be updated separately for all other fields.

Document Tracking

This topic focuses on how financial aid document tracking is performed in CampusVue.

Adding a Financial Document

To track financial aid documents:

- 1 Select the student and click **View > Financial Aid > Documents** to open the FA Document Tracking form. Here you can view any FA documents that have already been added to the student's list.

Note: This is the same documents form available at **View > Contact Manager > Documents**, but it is already filtered to FA documents only.)

FA Document Tracking: Jones, Mike

Unique Student ID: 27004 SSN: 538-94-0075
 Student Number: 265 2006-07 Completion Date:

Award Year: 2006-07 Add Document List Add Document

Document	Source	Status	Requested	Approved	Received	Date Due
Bank References	SA	Required				8/31/2006

Display Document Scan Cover Sheet Audit Edit Delete

Document Detail ISIR Details

Document: Document Status:
 Enrollment: Bach. of General Management

Date Requested: Date Sent: Date Approved:
 Date Due: Date Received: Date Expires:
 Comments:

Save Cancel Close

- 2 Select an **Award Year** from the drop-down list. If the option **<All Years>** is selected, the **Completion Date** cannot be evaluated and the system populates the **Completion Date** field with "N/A".

- 3 Click **Add Document** and select the appropriate document from the drop-down list (**Document Detail** tab).
- 4 Select the appropriate **Document Status** (**Required**, **On File**, etc.), and then select the **Date Requested** and optionally the **Date Due**.
- 5 Click **Save** to save the changes and **Close** to close the FA Document Tracking form.

Editing a Financial Aid Document

After a document has been received in your office:

- 1 Select the document from the document list grid, and click **Edit**.
- 2 Update the **Document Status** (**Document Detail** tab).to the respective status that applies (e.g., **On File**), and enter the **Date Received**.

The screenshot shows the 'Document Detail' tab of the FA Document Tracking form. The 'Document' dropdown is set to 'FAFSA' and 'Enrollment' is 'Facilities Management for 2005S'. The 'Date Requested' is '8/9/2005'. The 'Document Status' dropdown is set to 'On File'. The 'Date Sent' and 'Date Received' fields are empty. A table on the right lists document codes and their descriptions. At the bottom are 'Save', 'Cancel', and 'Close' buttons.

Code	Description
NOTSENT	Not Sent
OK	On File
REJ	Received but Rejected
DOGMA	Religious Document
REQNR	Requested - Not Required
REQREQ	Requested - Required
REQ	Required
SENT	Sent

- 3 Click **Save**.

Estimating Student Aid

This topic focuses on creating financial aid estimates for students not yet enrolled in a program version, and discusses the use of the Estimates folder in providing an estimate of student aid based on the Total Cost of Attendance from the FAFSA. Awards listed in this folder are moved to the student's Awards folder after the student is enrolled.

Student Estimates

To perform the pre-packaging process:

- 1 Select the student and click **View > Financial Aid > Estimates** to open the FA Estimates form.

Note: If this is the first time you have entered an estimated award package for the student, a blank FA Estimates form will appear on your screen.

- 2 Select the **Program Version** (hypothetical). The “Inst. Cost” (Institutional Cost) column in the Program Version drop-down list displays the sum of Tuition and Books/Supplies for the whole Program. This information is set up in the Program Setup form (**Lists > Financial Aid > Programs**).
- 3 Select the **Start Date**, **Enrollment Status**, **Grade Level**, **Dependency Status**, **Housing Status**, and **Beginning Award Year** fields by selecting the appropriate option from the drop-down lists.
- 4 The system populates the **Total Program COA** from the pre-set formula.
- 5 Select the **Year Sequence**. If this drop-down list is enabled, the user can select the FA academic year to which this COA applies. If you change the Year Sequence, the system recalculates the COA for the newly selected academic year.

- 6 Select/clear the **First Time Borrower** check box, as applicable. This value determines the correct expected date of the first disbursement when aid in the estimates folder is moved to the student's financial aid package during the enrollment process.
- 7 For a dependent student, fill in the **Student** and **Parent Info** in the **Estimate EFC** portion of the screen. For an independent student, leave **Parent Info** fields blank.
- 8 Click **Calculate EFC/Pell**. The system uses the simplified needs formulas to calculate EFC for students (independent) or parents (dependent) with gross income over \$50,000 (U.S.). You can manually enter the EFC and Pell amounts. You can calculate the EFC and Pell independently. This makes it easier to input the EFC directly and calculate the Pell eligibility without having to enter the additional student information

The screenshot shows the 'Estimate EFC/Pell' form in the Financial Aid Packaging software. The form is divided into several sections:

- Program Version:** Bachelor of General Management
- Beginning Award Year:** 2004-05
- Total Program CDA:** 2000.00
- Start Date Code:** (dropdown menu)
- Start Date:** 5/2/2005
- Housing Status:** On Campus
- Dependency Status:** Dependent
- Eligible Level:** Full year in college
- First Time Borrower:** (checkbox, checked)
- Year Sequence:** All
- Estimated EFC Section:**
 - Student Info:**
 - Marital Status:** Married (radio button selected)
 - Income:** 0.00
 - Legal State:** FL
 - Exemptions:** 0
 - Tax:** 0.00
 - Parent Info:**
 - Marital Status:** Married (radio button selected)
 - Income:** 0.00
 - Legal State:** (dropdown menu)
 - Exemptions:** 0
 - Tax:** 0.00
 - More Family:** 2
 - More College:** 1
- Calculate Section:**
 - Calculate EFC:** (button)
 - Estimated EFC:** 0.00
 - Calculate Pell:** (button)
 - Estimated Pell Eligible:** 2050.00

At the bottom, there are buttons for 'Load ISIR Data', 'Estimate Awards', 'Reset', 'Save', 'Copy', and 'Close'. A note at the bottom states: 'Estimate EFC and Pell Amount are calculated based on award year 2005-06 for award years beyond 2005-06'.

- 9 Click **Save** to save the information.
- 10 Click **Reset**. This action will delete from the database all estimate data saved. The program will then reset (clear) the **Estimate** form in order to begin another estimate for the student. The program will also delete all award data and academic years associated with the previous estimate.
- 11 Click **Load ISIR Data** to populate fields with ISIR data. This button is enabled only if the student has a valid ISIR on file.
- 12 After you have filled in the required information on the FA Estimates form, click the **Estimate Awards** button. Alternatively, you can go back to the form and make edits prior to clicking the **Estimate Awards** button.
- 13 The Estimated Awards form will appear on your screen. Select the **Package Method** for each year by selecting the appropriate option from the drop-down list. Then, click **Auto Package**.

The screenshot shows the 'Financial Aid' section of the software. It features a table of fund sources and summary statistics.

Seq	Award Year	FAA	Net Package	Grade Level	Packages Added
1	2004-05	500.00	475.00	1st year, never	Primary
2	2005-06	500.00	475.00	2nd year/sophomore	Primary
3	2006-07	500.00	475.00	3rd year/junior	Primary
4	2006-07	500.00	475.00	4th year/senior	Primary

Summary statistics at the bottom of the table:

- Package FAA: 2,000.00
- Total Package: 1,900.00
- Remaining Balance: 100.00

The 'Financial Aid' section includes a table with columns: Fund Source, Gross Amount, Net Amount, Seq, and Award Year. It lists four 'Federal Stafford Sub Loan' entries with gross amounts of 500.00 and net amounts of 475.00 for each year.

Buttons for 'Add Package', 'Add', 'Delete', 'Clear', 'Print', 'Save', 'Cancel', and 'Close' are visible.

Review the fund sources available in the Financial Aid package. Use the **Add**, **Delete** and **Clear** buttons to make any adjustments required for the package.

- You can click **Add** to activate the **Add Estimate Aid** portion of the form and allow you to add a new fund source to the package. The form then allows you to select a type of fund (**Grant**, **Loan**, **Student Pmt/Other**, or **Work Study**), **Source**, **Award Year** and **Gross Amount**.

The screenshot shows the 'Add Estimate Aid' form. It includes a table of fund sources and a form for adding a new fund source.

Seq	Award Year	FAA	Net Package	Grade Level	Packages Added
1	2004-05	500.00	475.00	1st year, never	Primary
2	2005-06	500.00	475.00	2nd year/sophomore	Primary
3	2006-07	500.00	475.00	3rd year/junior	Primary
4	2006-07	500.00	475.00	4th year/senior	Primary

Summary statistics at the bottom of the table:

- Package FAA: 2,000.00
- Total Package: 1,900.00
- Remaining Balance: 100.00

The 'Add Estimate Aid' section includes radio buttons for **Grant**, **Loan**, **Student Pmt/Other**, and **Work Study**. Below these are fields for **Source**, **Amount**, **Award Year**, and **Seq**. Buttons for 'Save', 'Cancel', and 'Close' are visible.

- If you select **Delete**, the highlighted fund source listed in the package will be deleted. Fund Sources cannot be edited, so if you wish to make a correction, you must delete the fund source and then add a new one.
- You can click **Clear** to remove all the fund sources in this package.

- If your **Remaining Balance** in the package is at zero, you will then need to print the **Estimated Award Letter**. To do so, select the **FA_Estimate_Award_Letter.rpt** (file name based on your configuration and setup) from the drop-down and click **Print**. When done, click **Close**.

Financial Aid Packaging

This topic provides information on how to create a Financial Aid package for a student.

Student Packaging

After a student moves to a **Being Processed** Status (or holds an **Active** Status) you can package financial aid for the student in CampusVue.

- 1 Select the student to be packaged and select **View > Financial Aid > Packaging** to open the Financial Aid Packaging form. Select an enrollment.

Description	Start Date	Campus	Status
Associate in Financial Management	5/3/1999	Campus Management Institute	Transfer To Other F
Bachelor in General Management	5/3/1999	Campus Management Institute	Active
Associate in Financial Management	9/5/2006	Campus Management Institute	Being Processed
Marketing Version Catalog	9/4/2006	Campus Management Institute	Attending
Marketing Version Catalog	9/18/2006	Campus Management Institute	Future Stat
Marketing Version Catalog	9/4/2006	Campus Management Institute	Active
Marketing Version Catalog	9/18/2006	Campus Management Institute	Future Stat
Book Associate in Marketing Manag	9/11/2006	Campus Management Institute	Future Stat
Mark Version 1	4/3/2007	Campus Management Institute	Attending
Marketing Version Catalog	1/5/2007	Campus Management Institute	Being Processed

Academic Year Start	Package Status	Pkg Date	Date Billed	Award Year 1	Award Year 2
1/5/2007	New/Not Packaged		Not Billed	2006-07	

GP Code: 01.0603

Add Edit Delete Close

- 2 Select an **Academic Year** and click **Edit**. Alternatively, you can click **Add** to add a new academic year and open the Financial Aid Academic Year form.
- 3 Review the top portion of the form (populated from the student's Enrollment and Program Version setup) for accuracy.

Academic Year: 1 Grade Level: 1st year, attended college before Start Date: 1/5/2007 End Date: 8/3/2007 Award Year 1: 2006-07 Award Year 2:

Dependency Status: (undetermined) First Time Borrower: Housing: Academic Year Definition: 50 Week Academic Year

Financial Aid Advisor: Joe Tester FA Entrance Interview: Rights Responsibilities Ack:

Budget: Financial Management Calculate: Tuition: 0.00 Books/Supplies: 0.00 Room/Board: 0.00 Travel: 0.00 Bank Fees: 0.00 Total Budget: 0.00 Institutional: 0.00

Other Charges: Amount: Institutional:

Award Year 1 Packaging Status: Not Packaged Award Year 2 Packaging Status:

Package Date: Package To Status: Full Time Package Reviewed: Enrollment Status: Full Time

Award Notice Printed: Print Award Notice Signed:

Package Save Cancel Close

Note: Select **Award Year 2** if the package overlaps two separate award years. The application uses this value to evaluate award year-specific criteria in the packaging promotion configuration. Enable the **First Time Borrower** check box if applicable. The **First Time Borrower** check box is enabled by default when the **1st year, never attended college** value is selected in the **Grade Level** drop-down list. However, the user can manually clear the **First Time Borrower** check box, without affecting the **1st year, never attended college** selection. Enter the **FA Entrance Interview date**. Enable the **Rights & Responsibilities Acknowledgement** check box if the student has read this document.

- 4 Select a **Budget** from the drop-down list and click **Calculate**.
- 5 Change the **Packaging Status** as required.

Financial Aid Academic Year - Smith, John

Academic Year: 1 Grade Level: 1st year, attended college before Start Date: 1/5/2007
 Dependency Status: (undetermined) First Time Borrower: ☐ Housing: With Parent End Date: 8/3/2007
 Weeks In Academic Year: 30.0 Months In Academic Year: 9.0 Award Year 1: 2006-07 Award Year 2:
 Credits Exp to Complete: 0.00 Credits In Academic Year: 0.00 Academic Year Definition: 30 Week Academic Year
 Weeks / Non-Enroll: 22.0 Weeks Enrolled in Acad Yr: 30
 Financial Aid Advisor: Joe Tester FA Entrance Interview:
☐ Rights Responsibilities Ack.

Budget	Amount	Institutional
Financial Management		
Tuition	6,000.00	
Books Supplies	1,200.00	
Room Board	3,600.00	
Travel	1,200.00	
Bank Fees	0.00	
Total Budget	13,200.00	8,400.00

Other Charges

Amount	Institutional
Internet Services	1200.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00

Award Year 1 Packaging Status: Not Packaged Award Year 2 Packaging Status:
 Package Date:
 Package Revised: ☐ Packaged To Status: Full Time
 Enroll Status: Full Time
 Award Notice Printed:
 Award Notice Signed:
 Package Save Cancel Close

Note: The **Award Year 1 Packaging Status** and **Award Year 2 Packaging Status** drop-down lists displays only the packaging statuses that are configured to allow a manual change if the school has a defined Packaging Status Promotion method. You can define automatic Packaging Status Promotion at **Lists > Financial Aid > Packaging Status Promotion**. Automatic Packaging Status Promotion can be configured to accommodate multiple academic years, academic years that cross over into subsequent award years, and re-entering students with packaged aid.

- 6 Enter a **Package Date** and click **Save**.
- 7 Click **Package** to open the Financial Aid Packaging form. This form contains information on the **Cost of Attendance**, the **Aid Packaged**, the **Remaining Balance to Schedule**, **ISIR Received Status** (for each award year if required), and **EFC**.

Fund Source	Award Year	Gross Award Amount	Net Award Amount	Amount Exp for Acad Year	Disb Sched	Amount Received	Amount Refund/Stip	Scheduled Refund/Stip	Status
<div> <div>Financial Aid Packaging - Smith, John A</div> <div> <div>Academic Year: 1</div> <div>1/5/2007 - 8/3/2007</div> <div>Enrollment Status: Being Processed</div> </div> <div> <div>Packaging Method: Primary</div> <div>Campus: Campus Management Institute</div> </div> </div>									

Pell COA	13,200.00	<div> <div>Add</div> <div>Edit</div> <div>Delete</div> <div>Reassign</div> <div>Auto Package</div> <div>Student View</div> </div> <div> <div>2006-07 Award Year Packaging Info</div> <div> <div>EFC Override</div> <div>Pell Paid EFC</div> <div>FAFSA Entered: 1/9/2007</div> <div>ISIR Received</div> <div>FAFSA to CPS</div> </div> <div> <div>Auto Zero EFC</div> <div>Sec EFC: N/A</div> <div>Model: (undetermined)</div> <div>1st Time Borrower</div> </div> </div>
Cost of Attendance	13,200.00	
- Packaged EFC (9 months)	0.00	
= Unmet Need	13,200.00	
- Gross Need-Based Aid Pkgd	0.00	
- Non Need-Based Aid Pkgd	0.00	
+ EFC Offset	0.00	
= Remaining Need	13,200.00	
Institutional Charges	8,400.00	
- Net Funding Scheduled	0.00	
Cash	0.00	<div> <div>ISIR ID being paid on</div> <div>Verification Status: Verified</div> <div>Eligible Health Professions?</div> </div> <div> <div>Student is not eligible for Pell. The student is either a Graduate Student or will</div> <div>ISIR Corrections Pending</div> </div>
+ Refunds/Stipends	0.00	
= Remaining Balance to Schedule	8,400.00	

- 8** Select a **Packaging Method** that fits the student’s status and program or select the “Manual Packaging Method” to add awards.

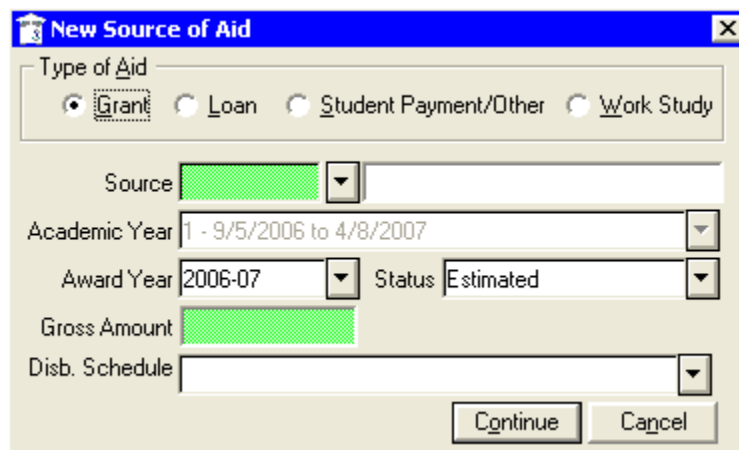
There are several options available for packaging financial aid for a student:

- If an Estimate was previously entered on a student, the Awards will already be populated. Each Award can then be edited for accuracy. FFEL Loans should be edited in order to have the CommonLine fields populated (see section below on adding a FFEL Loans).
- Another option is to click the **Auto Package** button, which will automatically provide an estimate package for the student. The awards will again have to be edited for accuracy and the FFEL Loans will have to be edited to populate Common Line fields.
- The third option is to manually add each award.

Student Packaging – Grants

To Add Pell Grants:

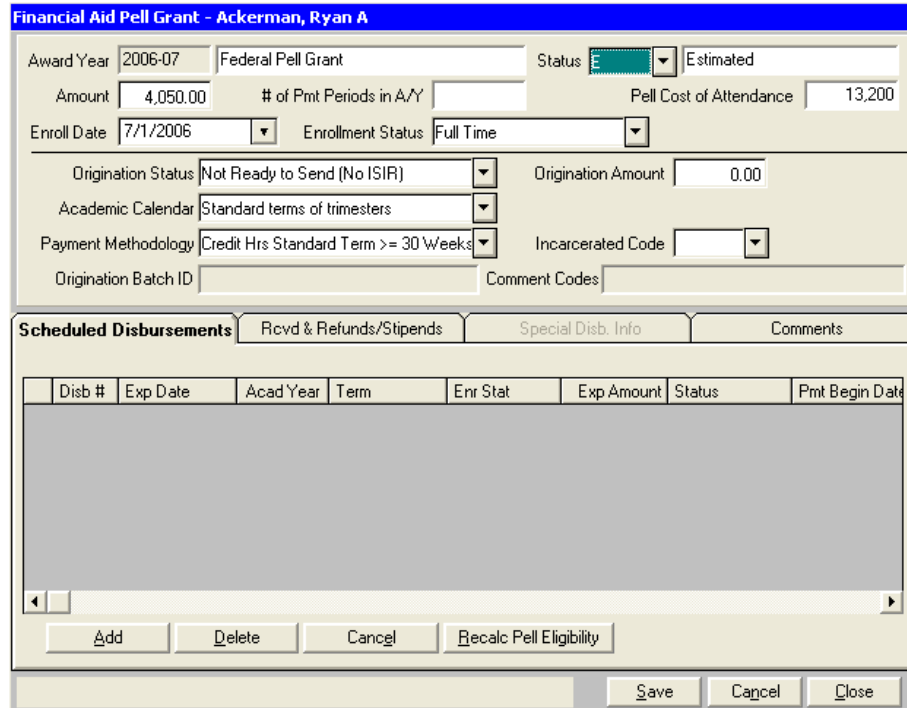
- 1 In the Awards folder, click **Add** to open the New Source of Aid form. The Type of Aid defaults to Grant.



The "New Source of Aid" form is a dialog box with a title bar that includes a close button. It contains several fields and buttons:

- Type of Aid:** A group box with four radio buttons: **Grant** (selected), **Loan**, **Student Payment/Other**, and **Work Study**.
- Source:** A text field with a green background and a dropdown arrow.
- Academic Year:** A text field showing "1 - 9/5/2006 to 4/8/2007" with a dropdown arrow.
- Award Year:** A text field showing "2006-07" with a dropdown arrow.
- Status:** A text field showing "Estimated" with a dropdown arrow.
- Gross Amount:** A text field with a green background.
- Disb. Schedule:** A text field with a dropdown arrow.
- Buttons:** "Continue" and "Cancel" buttons at the bottom right.

- 2 Select the **Source (Pell)**, **Award Year**, **Status**, and **Gross Amount**. Select a Disbursement Schedule (if available), or click **Continue** to open the Financial Aid Pell Grant form.



The "Financial Aid Pell Grant - Ackerman, Ryan A" form is a complex form with multiple sections and tabs:

- Title Bar:** "Financial Aid Pell Grant - Ackerman, Ryan A" with a close button.
- Award Year:** "2006-07" with a dropdown arrow.
- Federal Pell Grant:** A text field.
- Status:** A dropdown menu showing "Estimated".
- Amount:** "4,050.00" with a text field.
- # of Pmt Periods in A/Y:** A text field.
- Pell Cost of Attendance:** "13,200" with a text field.
- Enroll Date:** "7/1/2006" with a dropdown arrow.
- Enrollment Status:** "Full Time" with a dropdown arrow.
- Origination Status:** "Not Ready to Send (No ISIR)" with a dropdown arrow.
- Origination Amount:** "0.00" with a text field.
- Academic Calendar:** "Standard terms of trimesters" with a dropdown arrow.
- Payment Methodology:** "Credit Hrs Standard Term >= 30 Weeks" with a dropdown arrow.
- Incarcerated Code:** A dropdown arrow.
- Origination Batch ID:** A text field.
- Comment Codes:** A text field.
- Tabs:** "Scheduled Disbursements" (selected), "Rcvd & Refunds/Stipends", "Special Disb. Info", and "Comments".
- Scheduled Disbursements Table:**

Disb #	Exp Date	Acad Year	Term	Enr Stat	Exp Amount	Status	Pmt Begin Date
[Empty table body]							
- Buttons:** "Add", "Delete", "Cancel", "Recalc Pell Eligibility", "Save", "Cancel", and "Close" at the bottom.

- Click **Recalc Pell Eligibility** to set up Pell Disbursements (unless you have already selected a disbursement schedule). Click the **Exp Date** field to set up disbursement dates and click the **Term** field to set up terms for each disbursement (unless you have already selected a disbursement schedule). Continue adding expected dates and terms for each disbursement. Click **Save** and then **Close** to return to the previous form.

- Note that the Pell award is added to the student's Financial Aid Packaging form.

To Add ACG Grants:

- 1 Select **View > Financial Aid > Awards** to open the Financial Aid Packaging form. Select the appropriate academic year and packaging method in the upper left-hand corner.

Financial Aid Packaging - Sanak, Julie

Academic Year: 1 9/4/2001 - 4/8/2002 Enrollment Status: Recommend Suspension
 Packaging Method: Manual Campus: Campus Management Institute

Fund Source	Award Year	Gross Award Amount	Net Award Amount	Amount Exp for Acad Year	Disb Sched	Amount Received	Amount Refund/Stip	Scheduled Refund/Stip	Status

Buttons: Add, Edit, Delete, Assign, Auto Package, Student View

2001-02 Award Year Packaging Info

EFC Override: Auto Zero EFC: ☐
 Pell Paid EFC: Sec EFC: N/A
 FAFSA Entered: Model: Undetermined
 ISIR Received: 1st Time Bonover: ☐
 FAFSA to CPS:

ISIR ID being paid on: Save
 Verification Status: Cancel

Enrollment Status not selected

Buttons: FAFSA, ISIR, N/SLDS, Add Activity, F/A History, Stipends, Print, **Add ACG**, Close

- 2 Click the **Add ACG** button in the lower right-hand corner to open the Education form. Check the **ACG Eligible** box and populate the enabled required fields to establish ACG eligibility.

Education

Student's Age: 25

Previous Education: Previous Education GPA:

High School:

Code	State	Name	EPA	Grand Date	Student's Previous
05	IL	East Springfield High School	1/1/1999	6/7/2002	

Buttons: Add, Edit, Transfer, Cancel

Previous High School Program: ☒ ACG Eligible Previous Code: 01 Previous High School Program:

State: Student's Program:

University:

Code	State	Name

Buttons: Add University, Edit University, Transfer University, Cancel

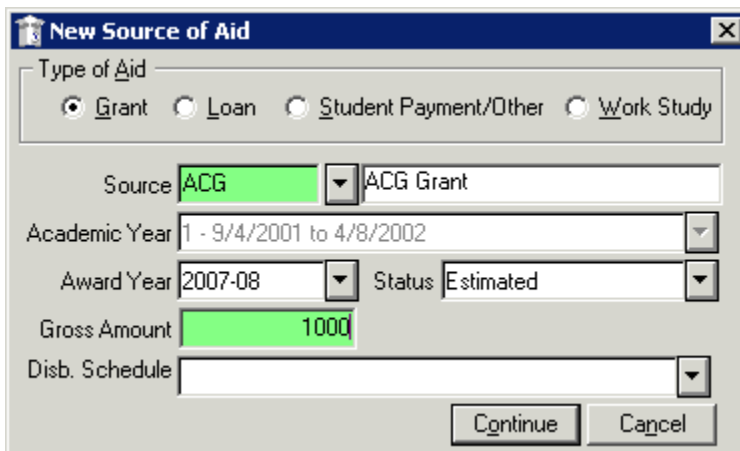
Employer: Employment Status:

Address:

Comments:

Buttons: Save, Cancel, Close

- Click **Save** and **Close** to be returned to the Financial Aid Packaging form. Click **Add** to open the New Source of Aid form. Select **Source (ACG)**, **Award Year**, **Status**, and **Gross Amount**. Select a Disbursement Schedule (if available), or click **Continue**.



New Source of Aid

Type of Aid:
☒ Grant ☐ Loan ☐ Student Payment/Other ☐ Work Study

Source: **ACG** (dropdown) ACG Grant

Academic Year: 1 - 9/4/2001 to 4/8/2002 (dropdown)

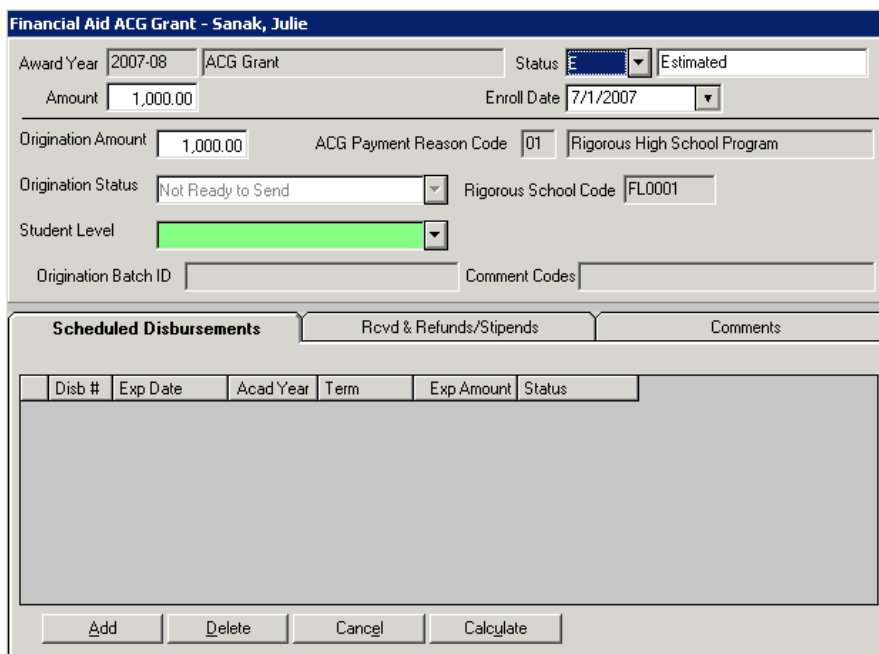
Award Year: 2007-08 (dropdown) Status: Estimated (dropdown)

Gross Amount: **1000** (text box)

Disb. Schedule: (dropdown)

Continue **Cancel**

- In the Financial Aid ACG Grant form, edit the required Student Level field. If a disbursement schedule was not previously selected, click **Add** to create a line in the grid for each anticipated disbursement of ACG funds. Click **Calculate** to populate the Exp Amount column, then populate the remaining fields in each line. Click **Save** and **Close** to return to the Financial Aid Packaging form.



Financial Aid ACG Grant - Sanak, Julie

Award Year: 2007-08 ACG Grant Status: **E** Estimated

Amount: 1,000.00 Enroll Date: 7/1/2007

Origination Amount: 1,000.00 ACG Payment Reason Code: 01 Rigorous High School Program

Origination Status: Not Ready to Send Rigorous School Code: FL0001

Student Level: (dropdown)

Origination Batch ID: Comment Codes:

Scheduled Disbursements						Rcvd & Refunds/Stipends	Comments
Disb #	Exp Date	Acad Year	Term	Exp Amount	Status		

Add **Delete** **Cancel** **Calculate**

Student Packaging – Loans

To Add Subsidized/Unsubsidized Loans:

- 1 Click **Add** on the Financial Aid Packaging form to open the New Source of Aid form. Select **Loan** as the **Type of Aid**.

- 2 Select the **Source**, **Award Year**, **Status**, and **Gross Amount**. If Disbursement Schedules (**Disb. Schedule**) are available, select an appropriate schedule from the drop-down list. Click **Continue** to open the Financial Aid Loan form.

- 3 Select **Lender** and click the **Servicer** field. A confirmation box may ask you to **Recalculate Bank Fees**. Click **Yes** to recalculate bank fees to adjust the net amount of disbursements.

- 4 Select **Servicer** and **Guarantor**. Update the **Application Processing Status** to type “N” until you are ready to export the Loan application. **Recipient Processing Type** defaults to type “GP” to certify Loan and Prom Note. Enter the **Date Certified** (when certification is complete). After the record is exported from the CampusVue application, the **Application Processing Status** and **CommonLine Loan ID** fields will be updated. After Loan Rosters are imported into the CampusVue application, the Application Acknowledgement Date (**Applic Ack. Date** field) will be updated.

- 5 On the **Borrower Info** tab, enter all required information on the left. Complete any fields in **bold** on the right: **Borrower Interest Indicator** (Does the student want to pay interest while in school?), **Borrower US Citizen Code** (Is the student a US citizen?), **Borrower Reference Code** (Are references on file for the student?), and/or **Borrower Default/Ref Code** (Do excess loan monies go back to the borrower?).

Personal Information - Borrower Info

Academic Year	2006-07	Lender	BDA	Bank of America	Loan Period Start	8/1/2006
Gross Amount	2,525.00	Service	C416	QNI Service	Loan Period End	4/30/2007
Bank Fees	131.25	Guarantor	C416	QNI Guarantor	Application Ref	
Net Amount	2,493.75	Status	E	Estimated	Applicable Date	
Amount Due	2,825.00	Application Processing Status			Account Type Indicator	A
Date Confirmed		Application Processing Type			Common Line Loan ID	

Borrower Information

Loan Amount: **Ackerman** MI **A** First **Ryan**
 SSN: **70558-9955** Phone: **(555) 089-3060**
 Address: **PO Box 209**
 City: **FORT LAUDERDALE**
 State: **FL** Zip: **33308**
 Add Type: **Employer** (Set in Address)
 DOB: **7/27/1978** License State: **FL**
 License #: **X131-561-79-1650**

Other Information

Disbursement Request Code
 Borrower Interest Indicator
 EFT Authorization
 Borrower LIB Closure Code
 Borrower State of Legal Res.
 Borrower State Res Since
 Borrower Tolerance Code
 Borrower Default Ref Code
 Borrower Date Lender Code

Buttons: **Save** **Cancel** **Done**

- On the **Prom & Other Info** tab, fill in the **Serial Loan Code** (Serial for renewing existing MPN or R for renewing MPN), **Date Prom Note Signed by Borrower**, **Student Default on Loans**, **Alternative Borrower Student Loan Debt** (Enter 0.0 if there is no debt.), **Valid Promissory Note?**, and **Promissory Note Delivery Code** (automatically defaults to Web-based) fields. Click **Save** and **Close** to save changes.

Prom & Other Info

Serial Loan Code: **N** Web Promissory Note: **Y**
 Date Prom Note Signed by Borrower: **7/5/2006** Promissory Note Delivery Code: **Web-based**
 Student Default on Loans: **N** Student Signature Code:
 Alternative Borrower Student Loan Debt: **0.00**

Buttons: **Save** **Cancel** **Done**

- Click the **Disbursements** tab. Click **Add Disbursement** to add a line to the disbursement grid for each planned loan disbursement in the academic year. Enter disbursement dates and terms on each line. Click **Calculate Disbursements** to calculate disbursement amounts so they match the net amount.

- 8 Select **Yes** to recalculate disbursements. Click **Save** and **Close**.

- 9 Notice that the new **Loan Aid** for the student appears in the Fund Source grid on the Financial Aid Packaging form.

- 10 Repeat the process for Unsubsidized Loan, PLUS Loans, and any additional loans to be processed. (PLUS loans require additional information on the **Prom & Other Info** tab).

Student Packaging – Student Payments/Agencies

CampusVue allows packaging of student payments as a Fund Source.

- 1 Click **Add** on the Financial Aid Packaging form to open the New Source of Aid form. Select **Student Payment/Other** as **Type of Aid**.

- 2 Select **Source**, **Award Year**, **Award Status**, and enter the **Gross Amount**. Click **Continue** to open the F/A Student Cash Payment/Other form.

- 3 If the Fund Source is an “Agency,” select the **Agency Payment** option. Then select the **Agency** and **Agency Branch**.
- 4 Enter **# of Payments** or **Payment Amount** and click **Calculate**.

F/A Student Cash Payment/Other - Ackerman, Ryan

Student Payment: Ackerman, Ryan

Payment Amount: 1,000.00 System: E Estimated

Interest Rate: 0.000

First Payment Date: 10/1/2006

Payment Frequency: Monthly Days: 30

Estimated Payments:

Date	Year	Term	Payment	Principal	Interest	Balance	Status
10/1/2006	1	2006F	333.33	333.33	0.00	666.67	6
11/1/2006	1	2006F	333.33	333.33	0.00	333.34	6
12/1/2006	1	2006F	333.34	333.34	0.00	0.00	6

Summary:

	Payment	Principal	Interest	Unpaid Balance
YTD	1,000.00	1,000.00	0.00	1,000.00

Buttons: Save, Cancel, Done

- Click **Save** and **Close** to close the F/A Student Cash Payment/Other form. The student cash payment appears as a fund source on the Financial Aid Packaging form.

Financial Aid Packaging - Ackerman, Ryan

Academic Year: 1

Financial Aid Packages:

Package Name	Amount	Status	Estimated
PELL	4,050.00	Yes	0.00
CHS	1,000.00	Yes	0.00

Financial Aid Summary:

Package Name	Amount	Status	Estimated
PELL	4,050.00	Yes	0.00
CHS	1,000.00	Yes	0.00

Financial Aid Details:

Package Name: PELL

Amount: 4,050.00

Status: Yes

Estimated: 0.00

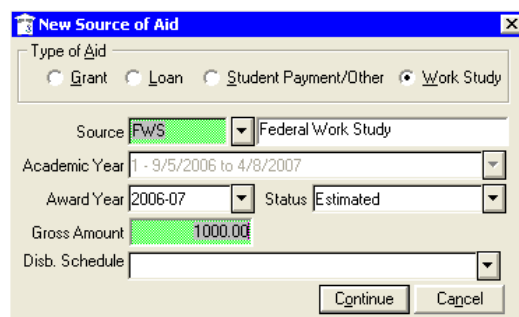
Buttons: Save, Cancel, Done

Student Packaging – Work-Study

A work-study award is different from the other packaged awards (Pell grant, loan, and cash payments) because work-study disbursements are never posted to the student's ledger card. The disbursements are made directly to the student. In addition, you do not “schedule” disbursements for work-study; students are paid as the work is performed.

To package a student for work-study aid or record a disbursement:

- Click **Add** on the Financial Aid Packaging form to open the New Source of Aid form. Select **Work Study** as the **Type of Aid**.



New Source of Aid

Type of Aid
☐ Grant ☐ Loan ☐ Student Payment/Other ☒ Work Study

Source: FWS Federal Work Study

Academic Year: 1 - 9/5/2006 to 4/8/2007

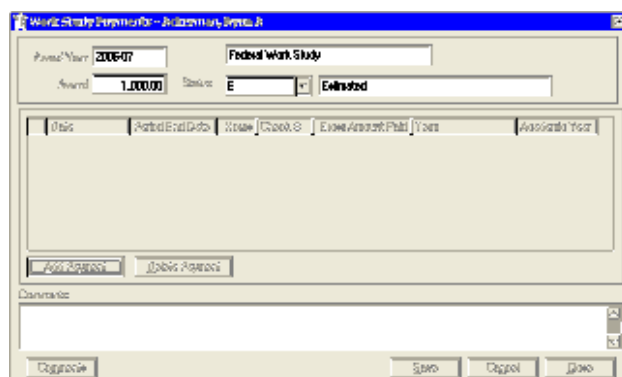
Award Year: 2006-07 Status: Estimated

Gross Amount: 1000.00

Disb. Schedule:

Continue Cancel

- 2 Select **Source**, **Award Year**, **Status**, and enter the **Gross Amount**. Click **Continue** to open the Work Study Payments form.



Work Study Payments - Addendum, Source: A

Period Year: 2006-07 Federal Work Study

Award: 1,000.00 Status: E Estimated

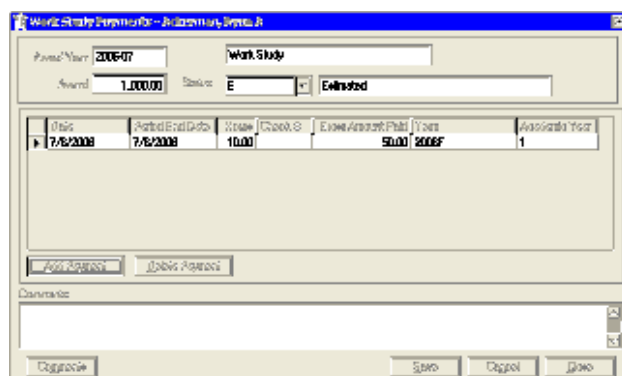
Date	Period End Date	Hours	Check #	Gross Amount Paid	Term	Academic Year
------	-----------------	-------	---------	-------------------	------	---------------

ADD DISBURSEMENT Update Payment

Comments:

Discipline Save Cancel Close

- 3 To enter a disbursement, enter the **Date** (the start date of the student's work tenure), the **Period End Date** (the end date of the student's work tenure), **Hours** (the total number of hours that the student worked in the stipulated period), **Gross Amount Paid** (the amount that is to be paid to the student), and the **Term** (the term of the course program). Click **Save** and **Close** to close the Work Study Payments form.



Work Study Payments - Addendum, Source: A

Period Year: 2006-07 Work Study

Award: 1,000.00 Status: E Estimated

Date	Period End Date	Hours	Check #	Gross Amount Paid	Term	Academic Year
7/8/2006	7/8/2006	10.00		50.00	2006F	1

ADD DISBURSEMENT Update Payment

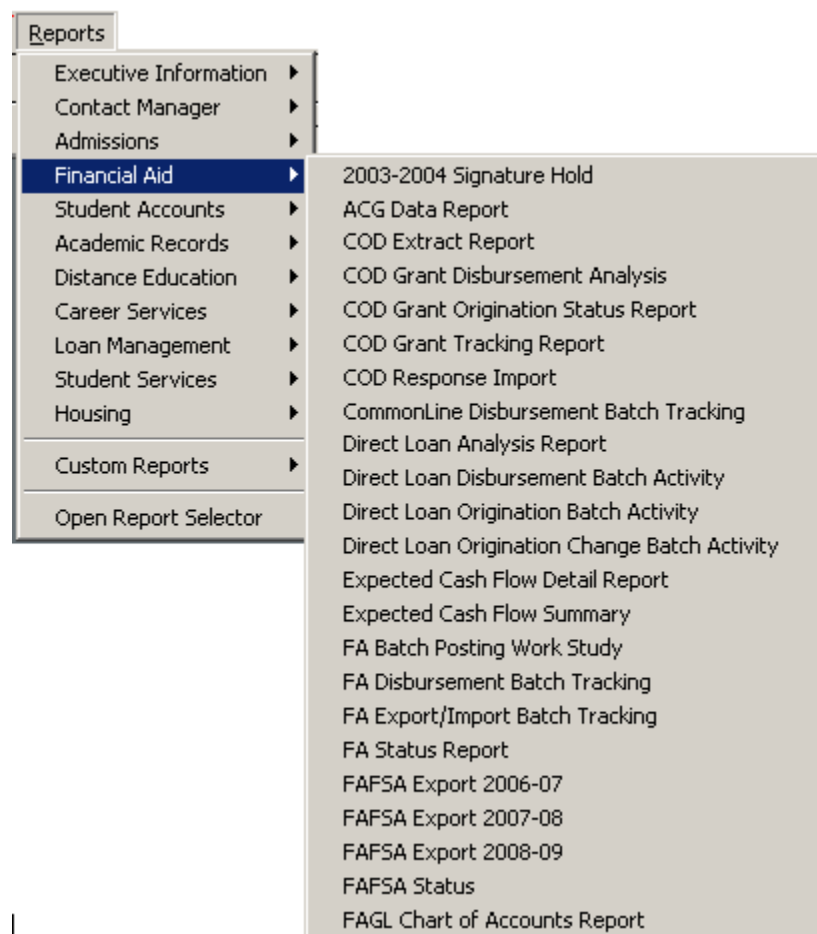
Comments:

Discipline Save Cancel Close

Note: If you attempt to add a disbursement that exceeds the total amount of the award, CampusVue will display a message stating that you cannot save the offending transaction.

Financial Aid Reports

The **Reports** drop-down menu is organized by departments. Each department has a list of reports that are relevant to the work done there. The list of reports is alphabetically sorted for each module and varies in length as new reports are added and old reports are replaced with newer versions. An asterisk (*) indicates a customized report designed for your institution(s). You can click **Reports > Financial Aid** to access reports associated with the Financial Aid module.



The Reports menu displays the following two menu items for each module:

Custom Reports

Custom Reports are designed especially for your campus. Such reports are developed by someone at your school who can use Crystal Reports®. These reports are created either by editing an existing CampusVue generic report or by creating a new report from scratch. Your System Administrator can use the **Setup > Report Maintenance** option to work with custom reports.

Open Report Selector

You can click this option to display a window in which all reports (for all modules) that you have permission to run are listed by going to **Reports > Open Report Selector** option.

General Features of CampusVue Reports

- Once a report has been generated, some features are viewable and are common to all the department-specific reports in CampusVue. Listed below are common features:
- The **Title** of the report is in the upper-left corner of each page.
- The **Selection Criteria** are listed in the upper-left corner of the first page.
- The **Sort Order** is listed in the upper left corner of the first page.
- The **Name of the Program** that produced the report is listed in the upper-right corner of the first page.
- The **Date and Time** that the report was printed is listed in the upper right corner of each page.
- **Column headers** are shown at the top of each page.
- **Group headers** are listed on the left side of the report as required by your sorting criteria. Note that you can sort by all the available sort variables but group totals are available only for the high-order three sort variables.
- The **Total number of records** selected will be listed at the end of the report.
- The **Company name** will appear in the lower-left corner of each page. (This is the company name from the **Setup > System menu option**.)

[illegible]

Note: Reports from your system parameter tables can be printed in a similar manner from the **Lists** menu.

Some reports display as HTML documents. To print these reports, right-click on the report and select **Print** from the context-menu.

Accessing Reports

Reports are accessed from the **Reports** option on the Menu bar. You can run reports only if your user profile has been granted the proper permissions. Select **Reports > Open Report Selector** to open a window that lists by department all the reports that you are permitted to run.

To access a specific Financial Aid report:

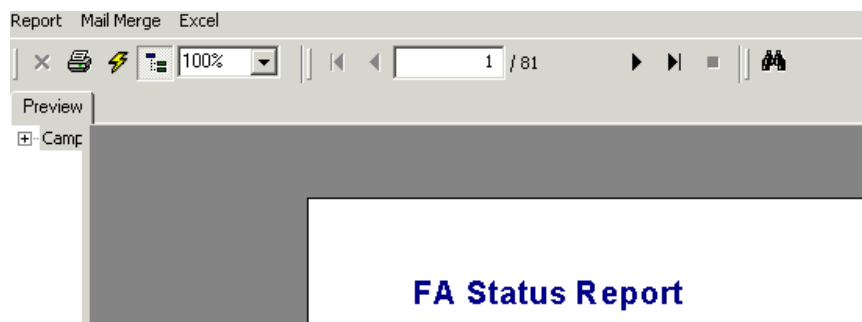
- 1 Select **Reports > Financial Aid > specific report**.
- 2 In the Report Selection form that opens, select the parameters that will satisfy your reporting requirements.

The following screen displays the Report Selection form for the COD Grant Disbursement Analysis.

Report Preview

After selecting the appropriate parameters from the Report Selection form, click **Preview** to open the Report Viewer form and view your completed report.

The following screen displays the Report Viewer form for the **FA Status** report.



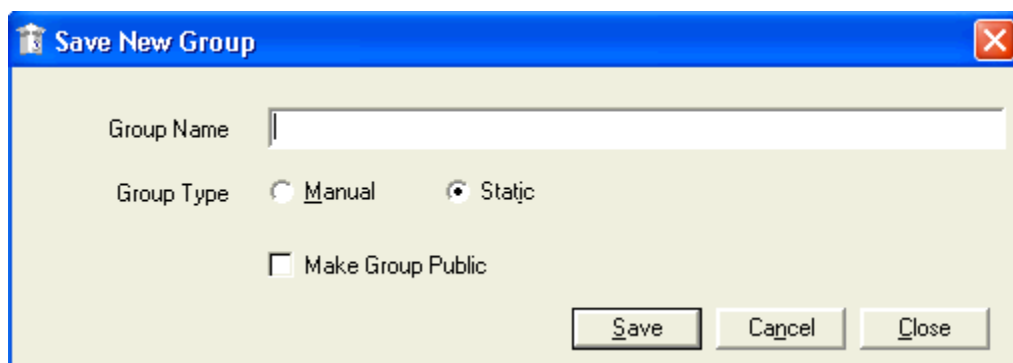
Report Viewer Controls

Report

The **Report** menu on the Report Viewer form provides for printing the report, printer setup, exporting the report to other applications such as Excel, and closing the viewer window. The following options are available on the Reports menu:

- **Print:** Select this option when you are ready to print the report. A Print icon is also provided at the top of the Report Viewer form.
- **Print Setup:** Select this option to call the typical Windows printer setup form from which you can select a printer, set the number of copies to be printed, and access other reporting functions.
- **Save Student Group:** If the internal Campus Id and internal Student Id are contained in the record set for the report, you can save the students listed on the report as a group. Select this option and give your group a name.

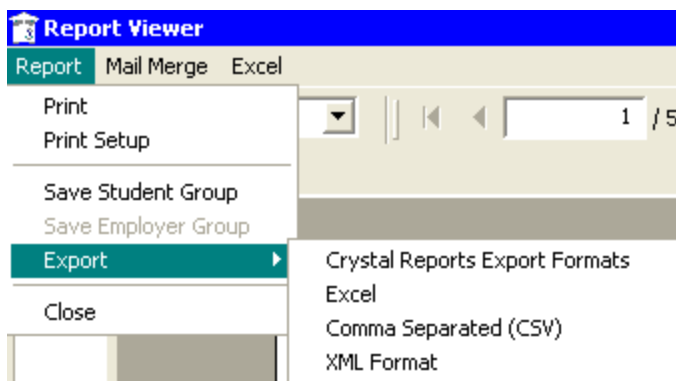
Select this option to open the Save New Group dialog:



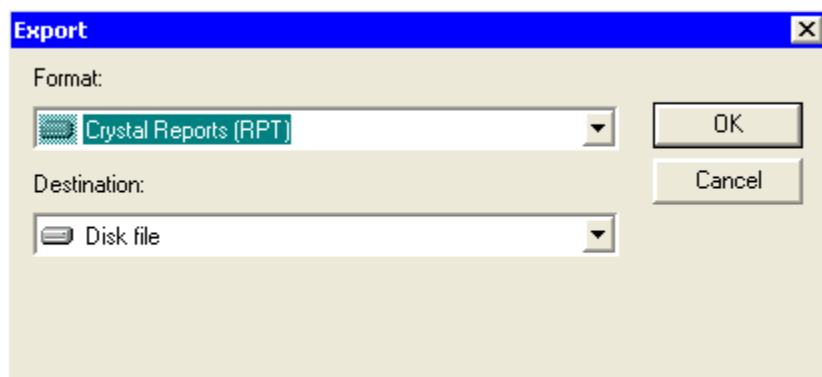
In this example, the default definition for the new student group is a "Static" group, meaning that the list of names in the group can be refreshed on demand (your school can also choose manual for the default group definition). You can also open the

group via View/Student Groups and change the group type to Dynamic, Frozen, or Manual. For details refer to *CampusVue Help*.

- Save Employer Group: similar to Save Student Group.
- **Export:** Select this option to view different export formats. In the example given below, users can select from the following four export formats: **Crystal Reports Export Formats**, **Excel**, **Comma Separated (CSV)**, and **XML Format**.



With each report selection you can select the format and destination of your report. Several options are available for both Format and Destination. Click **OK** after you make your selections.

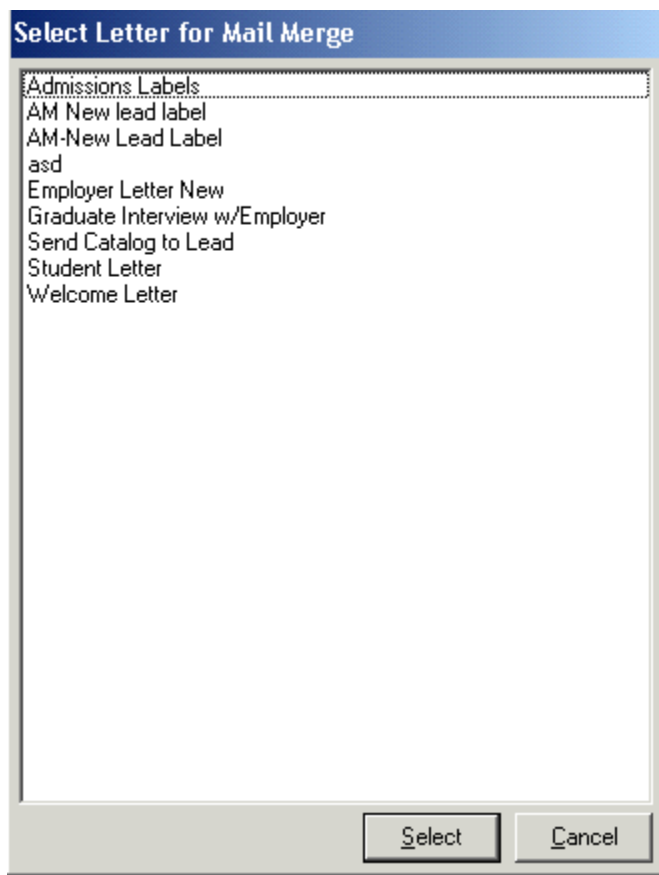


Close: Select this option to close the Report Viewer form and return to the Report Selection form.

Mail Merge

The **Mail Merge** option appears on the Report Viewer Menu Bar if the following three conditions are met:

- Your school has letter activities related to students.
- The path to the letter is correctly designated in **Setup > System**.
- The report being previewed lists students.
- When you click the **Mail Merge** option, all letter activities are listed as options. You can select the one with which to merge the names from the displayed report.



When you select to use the Mail Merge feature, you will be able to run the selected report, use the Merge tool to combine and print letters and update the student's activity record after processing the letter. The system will prompt you with a dialog box asking if you would like to update the Financial Aid. If you select **Yes**, the student's Financial Aid history will be updated after the Mail Merge is completed.

Excel

This option exports the data on the report to an Excel spreadsheet. This feature appears on every report. The export procedure uses column names for headings. A maximum of 65,000 rows can be exported. However, sub-reports ("drill-downs") are not exported.


Navigation Tools

At the top of the Report Viewer form, there is a set of navigation tools to help you maneuver in a multi-page report. By clicking the appropriate tool, you can go to the first page of the report, the next page, the previous page, and the last page.




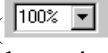
The following tools are available for selection:


Report Views: The report viewer provides a method of narrowing your view of the previewed report. By double-clicking on a report heading or sub-heading, you can open a view containing only that heading and the data below it. When you open a view of a heading, the program creates a view tab at the top of the report. You can alternate between views until you get the information you require. You can also print only a selected view of the report.

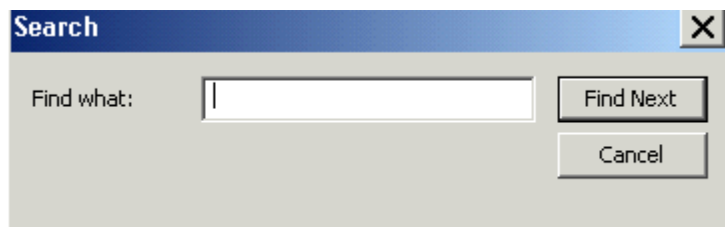
Close Current View: Click on the view to be closed and then click this control () to close it.

Group Tree: On the left side of the Report Viewer is a control known as the Group Tree. It is used to drill down to specific portions of your report. It is more significant in long reports and in those that have more than one or two groups. Click on the plus and minus boxes beside the group names to expand or contract the tree list. Click on a tree item to go to that portion of the report.

Toggle Group Tree: This tool () is used to show or hide the Group Tree. If you want to see more of the report page in your viewer window, hide the Group Tree by clicking this tool. Click it again to bring back the Group Tree.

Report Size: Use this tool () to size the image of the report to a convenient viewing size. Select one of the options from the drop down list or type in your own percentage value.


Text Search: Use this tool () to find the text that you need in the report preview by typing it in the Text Search box after clicking the binoculars. The program will find the first occurrence of the text in the report. If you click the binoculars again, it will find the next occurrence, and so on. Your search text entries are saved in a list so that you can go back to them by clicking the arrow beside the text box. When you close the report, your search entries are discarded. (The Search function only works forward from your place in the report. If you wish to search the entire report, return to page 1 of the report.



Report Printing

Report Printing is performed from the Report Viewer window.

To print a report in CampusVue:

- 1 With the report open in the Report Viewer window, click the **Print** icon () at the top of the window to open the **Print** dialog box. You can choose to print all of the report or selected pages. Indicate the number of copies of the report to be printed. Click **OK** to send the report to the printer.

- 2 Alternatively, select **Print** from the Report menu at the top of the Preview window. The report will be sent to your designated printer. If you want to change the destination printer, select a printer from the **Print Setup** dialog.
- 3 From the **Report** menu, select **Close** to close the Report Viewer window after the report is printed. You will return to the Report Selection window.
- 4 In the Report Selection window, you can choose to print another variation of the report by selecting different parameters. You can also save your previous selection of parameters by giving them a Preference Name and saving your preference for a later rerun.
- 5 Click **Close** on the Report Selection window to return to the CampusVue main window.

Cube Reports

The term "Cube Report" refers to a multidimensional, spreadsheet-style report that you can manipulate for the purpose of extracting data from the CampusVue database. An ordinary spreadsheet is two-dimensional in nature. As the term implies, a cube report can accommodate three or more (possibly hundreds of) dimensions in a report presentation. Each of the CampusVue modules has one or more cube reports associated with it. Data elements for the various cube reports are provided by the program in a form that you can readily manipulate to yield a particular view. Flexibility is the key characteristic of cube reports. You can move data around on the report, adding or removing horizontal and vertical data elements to achieve the precise combination of rows and columns you need to present the results in the desired format.

The program gathers data for a cube report each time the report is opened. The data is stored in a temporary file while the cube is open. For large databases, this data-gathering effort can take a few minutes.

Output can be generated from cube reports in four forms:

- On-screen displays in which rows and columns can be rearranged to suit your needs
- Printed spreadsheets with optional horizontal and vertical cross footed totals
- Charts and graphs
- Export files to Excel

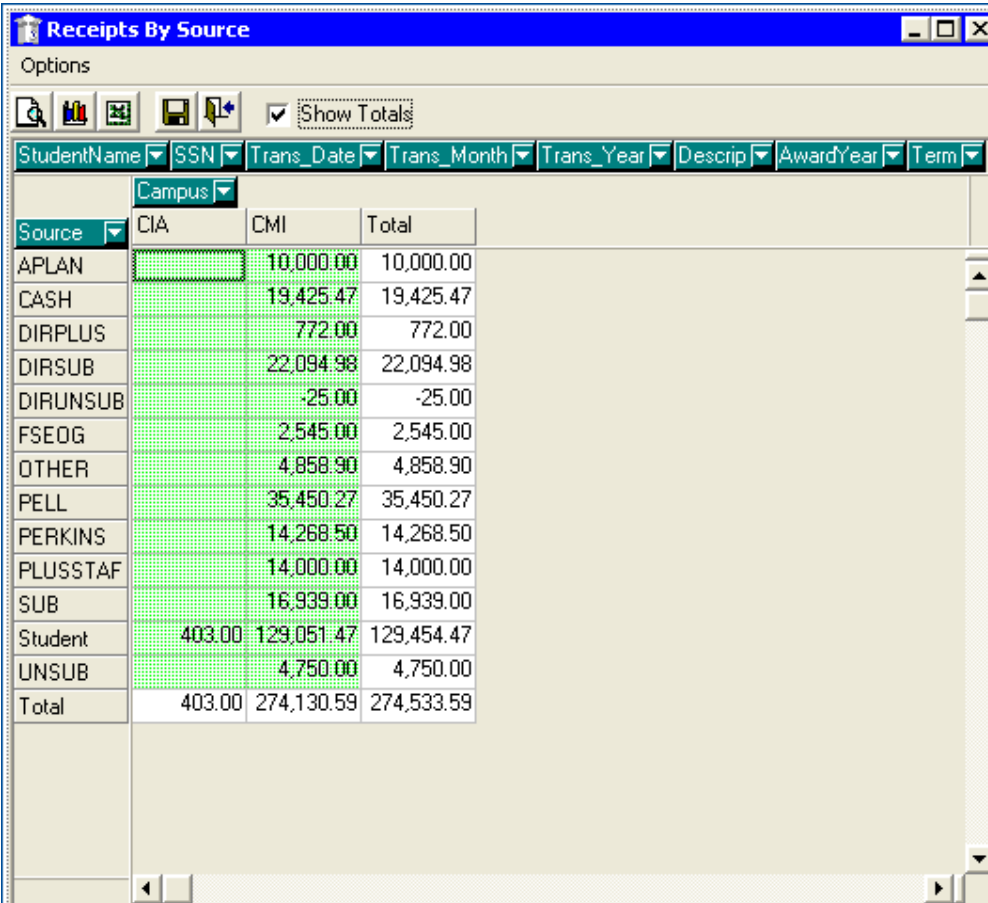
Cube reports are found below the horizontal line at the bottom of a department reports menu. The Financial Aid department currently does not include any canned cube reports. However, The SA cube report **Receipts by Source** can be used in the Financial Aid department. An example of this report is shown in the next section.

To view a Cube Report:

- 1 Select **Reports > Student Accounts > Receipts by Source** to open the Report Selection form.




- 2 The selection criteria available are **Term** and **Transaction Date**. Make your choices and click **Preview** on the Report Selection form to start the gathering of data for the cube report. The program will gather the basic building blocks of data for the cube. Be patient; this can take a few minutes. There's a lot of work going on that you can't see.



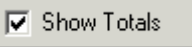
When the program has assembled the necessary data, a cube similar to the following screen will open:



Source	CIA	CMI	Total
APLAN		10,000.00	10,000.00
CASH		19,425.47	19,425.47
DIRPLUS		772.00	772.00
DIRSUB		22,094.98	22,094.98
DIRUNSUB		-25.00	-25.00
FSEOG		2,545.00	2,545.00
OTHER		4,858.90	4,858.90
PELL		35,450.27	35,450.27
PERKINS		14,268.50	14,268.50
PLUSSTAF		14,000.00	14,000.00
SUB		16,939.00	16,939.00
Student	403.00	129,051.47	129,454.47
UNSUB		4,750.00	4,750.00
Total	403.00	274,130.59	274,533.59

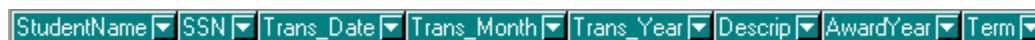
Across the top of the cube window are some important controls.

- **Preview:**  Shows you a preview of the printed report in spreadsheet format.
- **Graph:**  Takes you to the graph design feature. You need to select the data elements you want in the graph before clicking Graph. Ordinarily, you would not want to graph the totals along with the data cells. To select data cells to be graphed, click one corner of the range with the left mouse button, hold the button down and "drag" to the diagonally opposite corner of the range. All selected cells except the first one will be darkened.
- **Excel:**  Exports the cube report to an Excel spreadsheet. You can also select the parts of the report you want to export before clicking Excel. Totals will be exported unless you take action to do otherwise.

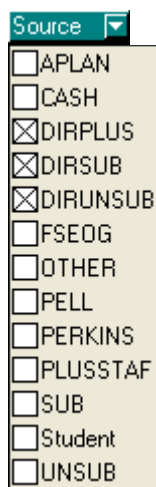
- **Save:**  Saves the cube report to the Web server.
- **Exit:**  Closes the report and returns to the CampusVue work area.
- **Show Totals:**  Determines whether totals will show on the report.

The example cube shows a three-dimensional report in a two-dimension format. Each row represents a student record. Subtotals and totals are shown for each row and column.

Notice the other data elements that have not been used in this particular view of the array. Any of these other data elements can be "dragged" to the horizontal or vertical axis of the grid. By doing so, you can change the report to an entirely different result.

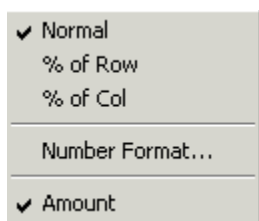


Another technique that you can use to tailor the cube is to select only portions of any one data element. For example, as we have done here, you can select only a few out of many selection fields. In this example, we have chosen **Source**:



Click on the arrow beside the data element name. The list of codes, names, and so on, will be dropped down for your selection. Click the box beside each desired code or name. Those with X in the box will be used in your report. Those with blank boxes will not be used. To select all choices or to deselect all choices hold the Ctrl (Control) key down while selecting.

Right Click Options: If you right-click anywhere in the data area of the cube report, a menu appears with some important features listed:



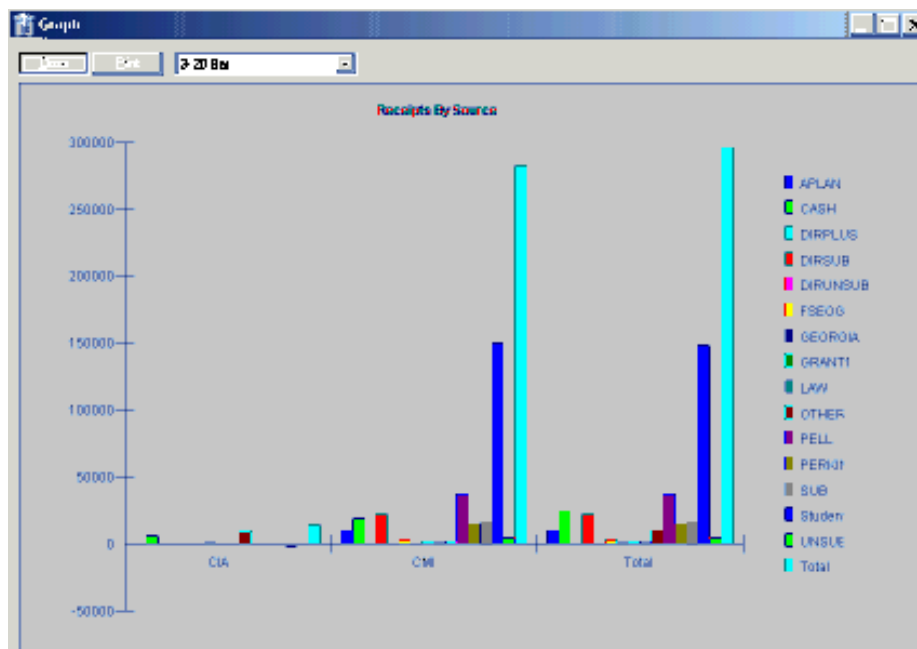
- **Normal:** Causes the cube data to be displayed in its normal format. In the case of our example, it is contribution to the activity analysis sorted by student.
- **% of Row:** Changes the data format to be a percentage of the row total.
- **% of Col:** Changes the data format to be a percentage of the column total.
- **Number Format:** Allows you to change the format of the numbers in the data cells.

- **Amount:** In this example there is only one option for data to be displayed. In other cubes, there may be more options listed here.

Graphing Data: For our example, we have chosen to create a three-dimensional bar graph. The illustrations show the selected data from the cube (totals have been turned off to facilitate the data selection) and, below it, the resulting graph. To select data cells to be graphed, click one corner of the range with the left mouse button, hold the button down and "drag" to the diagonally opposite corner of the range. All selected cells except the first one will be darkened such as in the example below.

Source	CIA	CMI	Total
APLAN		10000	10000
CASH	6000	19077	25077
DIRPLUS		772	772
DIRSUB		22095	22095
DIRUNSUB		-25	-25
FSEOG		2545	2545
GEORGIA	1000		1000
GRANT1		1000	1000
LAW		1234	1234
OTHER	9200	1109	10309
PELL		37252	37252
PERKINS		15244	15244
SUB		16939	16939
Student	-2097	150045	147948
UNSUB		4750	4750
Total	14103	282037	296140

After you click the **Graph** icon, the resulting bar graph appears:



To change the type of graph, click the graph style list in the upper left corner of the graph screen. Select any of the listed styles. Maximize the graph screen to see the labels clearly when you are working with many elements.

Export to Excel: The same data can be exported to Excel. These column headers were formatted manually after the import to improve the look of the example.

	A	B	C	D	E	F
1	Source	CIA	CMI	Total		
2	APLAN	0	10000	10000		
3	CASH	6000	19076.97	25076.97		
4	DIRPLUS	0	772	772		
5	DIRSUB	0	22094.98	22094.98		
6	DIRUNSUB	0	-25	-25		
7	FSEOG	0	2545	2545		
8	GEORGIA	1000	0	1000		
9	GRANT1	0	1000	1000		
10	LAW	0	1234	1234		
11	OTHER	9200	1108.9	10308.9		
12	PELL	0	37252.27	37252.27		
13	PERKINS	0	15243.5	15243.5		
14	SUB	0	16939	16939		
15	Student	-2097	150045	147948		
16	UNSUB	0	4750	4750		
17	Total	14103	282036.6	296139.6		

Preview: The Preview of the cube report from the cube is shown here with totals included.

Print Preview 1 / 1

Receipts By Source			
Campuses:			
Campus Management Institute			
Campus Institute of Art			
Source	CIA	CMI	Total
APLAN		10,000.00	10,000.00
CASH	6,000.00	19,076.97	25,076.97
DIRPLUS		772.00	772.00
DIRSUB		22,094.98	22,094.98
DIRUNSUB		-25.00	-25.00
FSEOG		2,545.00	2,545.00
GEORGIA	1,000.00		1,000.00
GRANT1		1,000.00	1,000.00
LAW		1,234.00	1,234.00
OTHER	9,200.00	1,108.90	10,308.90
PELL		37,252.27	37,252.27
PERKINS		15,243.50	15,243.50
SUB		16,939.00	16,939.00
Student	-2,097.00	150,045.01	147,948.01
UNSUB		4,750.00	4,750.00
Total	14,103.00	282,036.63	296,139.63

Preview Controls: There are several controls on the preview form including **Print**, **Print Setup**, **Margins and Columns**, **Page Change**, **Zoom In** and **Zoom Out**.

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