BASIC SIMS FOR

FINANCIAL AID USERS

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QC FAO - UPDATED 3/97
Queens College --- Office of Financial Aid Services
FAO QUASAR CRIB SHEETS

CODES

FIN AID SOURCE CODES (see table BOSRC, BHPRG,

24 = TAP [leave award field blank; enter sem
reduction, sem max, schedule,
status (Actual/Estimate)]
AP = Apts [enter p followed immediately by per
credit amt in award field]
CU = CUSTA [enter award]
F1 = Pell (for fall, spr, and front-end sum pell)
[enter i followed immediately by
student's pell efc in award field]
F4 = back-end sum pell [enter same info as for F1,
plus if needed pell remaining (max left
for backend)]
F2 = Seog [enter award]
4P = NDSL/Perkins Loan [enter award]
1P = Sub DL [enter net award]
2P = Unsub DL [enter net award]
3P = PLUS [enter net award]
WG = Grad Waiver full-time [enter award]
WP = Grad Waiver part-time [enter award]
*** WG and WP need college-specific logic in
a college module ***

FIN AID STOPS (see table STOPS)
key to notations in front of progs in list below:
% = posted on-line only
# = posted on-line and in batch by various programs
-------------
% F = General Fin Aid (QC only?)
% FO = Fin Aid Overpayment (QC only?)
# GE = GSL/Stafford Exit Int
# GL = GSL/Stafford Default
% NE = NDSL/Perkins Exit Int
# NL = NDSL/Perkins Default
# Z = SEEK fin aid (QC only?)

FIN AID PROGS (see table PROGS)
key to notations in front of progs in list below:
* = block certain vouchers (need Y in progs table)
% = posted on-line only
# = posted on-line and in batch by various programs
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* # 2A = GSL/Stafford Default
* # 2B = NDSL/Perkins Default
* % 2C = Fin Aid overpayment
* % 2D = Prom note not signed (for functionality, need
college-specific logic in college module)
NA 2E = old NO SEP
% 2F = immigration problem
% 2G = FAT pending
% 2H = Selective Service problem
* % TA = ]
* # TB = ] - title iv unsatisfactory progress
* % T4 = ]
BRUAWU TRANSACTION CODES

a = add (reason code is blank)
do on any blank line on BRUAWU
see instructions on prior page for
required program specific info

m = modify (reason code 02)
do on line with original award on BRUAWU
to modify
- tap: space over the calculated
  award; put in changed data as if
  needed for recalc
- pell: type new efc in format of
  original posting, and space over
  rest of calculated award
- apts: type new per credit amt in
  format of original posting, and
  space over rest of calculated award
- other programs: do the same way you
  would do an a transaction

i = force ineligibility (reason code 91)
do on line with original award

** you will ALMOST NEVER use these
d (completely delete - code 01)
do on line with original award

o (override / force eligibility - code 80)
do on line with original award

*** THIS MUST BE DONE AFTER THE AWARD IS
ALREADY POSTED
*** THIS WILL OVERRIDE ALL CURRENT AND
FUTURE ELIGIBILITY CHECKING FOR THIS
PROGRAM FOR THIS TERM; do not use it to
compensate for bad data!!!

SPECIAL BILL RECALCS NOT TIED TO POSTING AWARDS:
*** no reason codes needed with these ***
*** do on any line on BRUAWU ***
g

f *** MORE POWERFUL THAN g / does things
even 027/028 recalc will not do***
**QUASAR SCREENS**

*** STUDENT SCREENS ***

Look at the special pfkey options on the bottom of each of these screens. They can make a frequent transfer faster, and often also let you see additional information on the same screen.

**BRUAWU** - Award Waiver Update
** <pf7> from here to BRQAWI/ACTIVE
** <pf5> from BRQAWI/ACTIVE to INACTIVE

**BRQPAI** - Bursar Inquiry/Financial Charges Inquiry
  shows vouchered aid, outstanding vouchers;
  student payments; aid payments for semester

**BRQTCI** - Bursar Inquiry / Financial Comments
  the system logs certain transactions related to
  billing and related code changes here

**BRQSOA** - Bursar Inquiry / Statement of Accounts
  summary of billing info for all sims-registered
  semesters

  Look also at BRQAWI and BRQTRI to get a sense of what's
  available on each of these

**RIQSCA** - Reg Inquiry/Student Courses (Active)
  *** use pf5 to see info on all courses for sem**
  includes cr/eq credits/esl indicator/ remedial, devel,
  compensatory indicators/ repeat ind/ summer 2 flag
  *** use pf11 for addl data on same cses ***

**SIQSEI** - Student Inquiry/Student Emergency Info
  shows class schedule (course meeting times/
  location/ instrs)

**SIQSRI** - Student Inquiry/Student Record Inquiry (transcript)
  *** This is the only place any information about sems
  prior to the first Quasar semester will show.
  *** good place for address / phone / dob info

**SIQSPR** - Student Inquiry/ Progs
**SUSSPR** - Student Update/ Progs (restricted access)
SIQSTP - Student Inquiry/STOPS
   includes TEMP CLR info as well as clearance info
   *** NOTE: a TEMP CLRd STOP will still be listed in the standard student screen heading, but it is not treated the same way by the system as an active STOP
SUSSTP - Student Update/STOPS (restricted access)
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SUSTSI - Student Update/TAP STAP Information
SIQTSI - Student Inquiry/TAP STAP Information
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SIQDIQ - Degree Inquiry
   info about degree certification status when students file for graduation
----------
SIQSFR - Foreign Information Summary
   A#, visa status type, perm residency date
----------
SIQSTM - Term Academic Inquiry
   **** translates student's basic term demographic codes ****
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SIQSTU - Student Information Inquiry
**FAO QUASAR CRIB SHEETS - QUASAR SCREENS (continued)**

*** SYSTEM (non-student) SCREENS ***

**TABLES** (for specific system values/translations)

*** must go to the relevant menu for this - no screen transfer from a student screen to these ***

**BRQSSI** - Semester Source Code Inquiry
(select from BRQ submenu)

view information about the way a specific source code is set up in the system for that semester

**TBLTBI** - Tables/ Table Inquiry
(select from main menu)

**PELL TABLES:**
2 tables per term; originally
- independent (became lives away)
- dependent (became lives with)

based on CUNY's cost of attendance and fed table changes, these 2 tables are currently exactly the same but both need to be there before registration begins, even where all programs are grad programs

format of table names:
- PIyym
  (eg pi976 = indep for 06/1997)
- PDyym
  (eg pd979 = dep for 09/1997)

some tables useful to Fin Aid include:

**ACLVL** - Academic level (for a course)
  eg R = regular, N = remedial, C = compensatory, D = developmental

**ADMIS** - Admission Code
**BILCD** - Bill Code
**BOPRI** - Source Code Priority Table
**BOSRC** - Source Code Description
**CURRC** - Curriculum (major)
**FINTP** - Aid eligibility based on resde
**FAREA** - Financial Award Obsolete Reasn
**GROUP** - Group
**PROGS** - PROGS
**RNAME** - SIMS Program names and numbers
**RESDE** - Legal Residency
**STOPS** - STOPS
POSTING A FINANCIAL AID AWARD (BRUAWU)

During regular semesters (Fall and Spring), most aid awards are entered into the system by a tape from UAPC. Awards may also be entered/modified on BRUAWU.

To ADD most aid awards, the standard procedure is as follows:

- Enter a blank line on BRUAWU,
- Enter a (the 2 character source code) in the two character source code field.
- Tab to amount and enter the amount of the award.
- Press <enter> to process the award.

TAP, APTS, and Pell have special requirements:

The rest of the transactions are the same as the standard ADD above.

- For APTS, enter the per credit amount, preceded by p, in the amount column (e.g., p40 for $40 per cr).
- For Pell, enter the pell efc, preceded by i, in the amount column (e.g., i105 for efc of 105). Tab to depend code and enter either h for at home or a for away. *** With current pell tables, it doesn't matter which you put here.
- For TAP, leave the amt column blank.
  Tab to:
  MAX enter amt from fap
  REDUCTION enter amt from fap
  SCHEDULE enter schedule from fap
  TAP STATUS
    either A (actual)
    or E (estimate)

+---------------------------------------------------------------+
| Aid can be posted on BRUAWU without a student being registered, and with the student otherwise ineligible for, merely indicating awards. After you enter aid on BRUAWU, CHECK BRQPAI for each registered student to see what has been applied toward the bill. |
After you press <enter> to add an award, all awards other than APTS and Pell and TAP appear with the same dollar amount you entered, regardless of the student's actual eligibility /registration.

APTS and Pell and TAP calculations on BRUAWU, and the resultant vouchers, will be recalculated by the system each time the student's registration status changes.

To modify aid awards,

on the line with the corresponding original award,

    type M for transaction type for "modify"

    enter all data required for that source code *** including any data required in the bottom section of the screen ***
    (be sure to space over any extra data remaining in the award field)

    type 02 for reason code

Press <enter> to process the transaction.
PROG CODES --- PLACING AND RELEASING

TO ADD A PROG:

On SUSSPR, place the cursor on the CODE field on the right side that is opposite the first blank grouping on the left.

Type the 2 character identifier for the specific PROG in the CODE field

Press <enter> to set the PROG

The PROG just entered moves to the left side, with all of the other data completed.

The start semester defaults to the current sim's default semester; the end date defaults to zeroes. The PROG will affect all future semesters until an end semester is entered.

To have the prog start effective an earlier semester, change the default semester on the student selection screen for SUSSPR when you enter the ssn.

+------------------------------------------------------------------+
| BE SURE THAT ANY RELATED FLAG IS ALSO SET ON UAPC.                |
+------------------------------------------------------------------+
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PROG CODES --- PLACING AND RELEASING (continued)

TO CLEAR THE PROG:

TO COMPLETELY CLEAR A LOAN DEFAULT PROBLEM THAT APPEARS AS BOTH A STOP AND A PROG, YOU MUST CLEAR THE STOP, AND CLEAR THE PROG, *** AND CLEAR THE CODE(S) ON UAPC ***.

*** IF YOU ARE DOING ONLY A TEMPORARY CLEARANCE OF A LOAN DEFAULT STOP, AND THE STUDENT IS NOT ELIGIBLE FOR AID AS A RESULT, YOU WILL LEAVE THE PROG AND THE UAPC INDICATORS AS IS. FOLLOW THE TEMP CLEAR PROCEDURE FOR STOPS.

To clear the PROG indicator, place the cursor in the right hand section opposite the PROG you want to clear.

press <tab> at the CODE field  
*** DO NOT ENTER THE CODE HERE ***

continue to <tab> to TERM END

Enter the start of the term effective which the PROG is being lifted; enter it in mm/yyyy (eg 02/1997) format.

press <enter> to process the change

NOTE THAT A PROG WITH A START TERM OF 2/97 AND AN END DATE OF 2/97 WILL NO LONGER APPEAR ON THE VARIOUS 2/97 SCREENS AS AN ACTIVE PROG, and will not be active at all.

press <enter> to clear the PROG

The new END DATE just entered moves to the left side, with all of the other data about that PROG.

BE SURE TO REMOVE THE RELATED FLAG ON UAPC.
Although the SIQSTP screen has the most detailed information about each STOP, many other screens notify the user that the student whose record is being viewed has one or more STOPs posted on the record.

These STOP codes are shown next to STOPs in the top section of most student screens. Due to the layout of that field on the screen, the codes sometimes run together. They may be deciphered by remembering that each code is two characters long, although in some cases the second character is a blank.

To view complete STOP history on a student who is showing STOPs in the top section,

tab to the 6 character transfer field

type SIQSTP to select the STOP INQUIRY screen for transfer

press <enter> to process the transfer request

Financial Aid STOPs can be placed on a student's record via batch programs and on-line.

To place a STOP on the SUSSTP:

TAB to the first CODE box on the right side of the screen that is opposite a blank section on the left.

Enter the two character STOP CODE you want to place.

press <enter> to place the STOP.

If you try to enter a new STOP in the section opposite a current STOP, it will not accept a new STOP code, and will give you the misleading message "CORRECT HIGHLIGHTED FIELD"; the section across from an existing STOP is only to modify that same STOP code.
STOPS can be released (if the reason for the STOP is completely resolved) OR temporarily cleared (for a one-time release only), OR completely deleted (**USE CAUTIOUSLY***).

Both processes are accomplished via the SUSSTP screen. Modify a STOP in the right hand section of the screen immediately opposite the information for that particular stop. All that needs to be entered is the new information for that stop. **DO NOT ENTER THE STOP CODE IN THE SECTION ON THE RIGHT IF YOU ARE MODIFYING (TEMPORARILY CLEARING, OR COMPLETELY RELEASING) A STOP; To do so will cause an error message.**

To modify an existing STOP on the SUSSTP:

To completely clear the stop:

Tab to the blank field after CLEARED on the line in the right section of the screen directly across from the STOP you want to completely clear.

- type today's date in format specified
- press <enter> to process the transaction

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TO COMPLETELY CLEAR A LOAN DEFAULT PROBLEM THAT APPEARS AS BOTH A STOP AND A PROG, YOU MUST CLEAR THE STOP, AND CLEAR THE PROG, *** AND CLEAR THE CODE(S) ON UAPC ***.

*** IF YOU ARE DOING ONLY A TEMPORARY CLEARANCE OF A LOAN DEFAULT STOP, AND THE STUDENT IS NOT ELIGIBLE FOR AID AS A RESULT, YOU WILL LEAVE THE PROG AND THE UAPC INDICATORS AS IS. FOLLOW THE TEMP CLEAR PROCEDURE FOR STOPS.
To temporarily clear a STOP on the SUSSTP:

Tab to blank field after TEMP CLR on the line in the right section of the screen directly across from the STOP you want to TEMP CLR

- type **Y** for YES
- press `<enter>` to process the transaction

(??? doesn't show date... how do you know if current or what?)

+-----------------------------------------------------+
¦ NOTE THAT A TEMP CLEAR STAYS AS A TEMP CLEAR until it is actively reversed. In other words, it is never reversed, it will continue to temporarily clear a STOP, thus permitting what it is supposed to HOLD. **A TEMP CLEAR must be manually uncleared** (same process-change Y to N) as soon as the necessary transaction has been completed. +-----------------------------------------------------+
TAP/STAP UPDATES ON SUSTSI

Updates to indicate that the student has failed to meet TAP progress/pursuit regulations can be made on the SUSTSI screen. Many entries that appear on this screen are made by various batch programs.
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*** FIN-AID RELATED BATCH PROGRAMS ***

Please note that every campus has different interpretations of what needs to be done in each program; in addition, in some cases programs have been specifically designed for only part of a process. Be sure you understand exactly what each program is doing and what the run options are. If the program doesn't meet your needs, request in the sims fin aid user group or other similar forum that changes be considered.

SIMB009 - posting of uapc award data to sims for vouchering (run as 009/27/28)

SIMB049 - apts cert (uses input from uapc / creates output for uapc)

SIMB053/080/081/082 - tap cert and related programs (uses input from uapc / creates output for uapc)

SIMB061 - pell table rollover

SIMB067 - batch posting of stops/ progs from manually formatted file (run simb027/28 after this if progs affect bill)

SIMB072 - enrollment status from sims to uapc (run as 026/072)

SIMB074/075/027 - posting of combined loan defaults from sfa to sims (uses sf555 output from uao wylbur exec)

SIMB125 - student loan clearinghouse

SIMB131 - deduction requests from sims to sfa

SIMB133 - sfa cycle payment posting to sims from check history file (run as 133/60/27/28) (uses output of sf280 from uao wylbur exec)

SIMB134 - sfa cycle exception listing using sfmaster file (in progress) (uses output of sf010 from uao wylbur exec)

SIMB135 - prorata / fair and equitable / prorate based on w grades

SIMB144 - title iv progress evaluation

SIMB148 - posting of max remaining pell for backend summer and spring (uses output of sf730 from uao wylbur exec)
*** GENERAL TIPS ***

1) Be sure the main menu looks like your own. If it does not, press <pf12> to signoff, because you landed on someone else's id.

2) If you expect to do many transactions of the same type, stay at the student selection screen for that transaction between students. NOTE: No matter how many screen transfers you do from that initial screen via a pf key or the screen transfer field, you will still be returned to that same student selection screen; the first screen you see after selecting the next student will be the same until you move around through the menu.

3) If you try to do a screen transfer and get the "you are not authorized..." message, check to be sure that you entered the 6 character code correctly. Very often the problem is that an unrecognized code was entered, not that you're unauthorized.

4) Use inquiry screens for lookup; using the corresponding update screen could result in unintentional updates.

5) Use a pf key listed on the bottom of the screen ** OR ** the 6 character screen transfer field (at the bottom of most student screens), to transfer to another screen for the same student; this is faster than going back to the menu, and also leaves you ready for your next student after you press <pf1> for new student.

6) Become familiar with the <tab>, <backtab>, <enter>, and <newline> keys ON YOUR KEYBOARD in order to maneuver best.

7) Press <pf1> to exit from the student's record as soon as you are finished with it. A student's QUASAR and POS records are both locked until you do this; if you are timed out or thrown out of the system before getting out of the student's record, that will keep the record locked until there is some manual intervention via MUT or the system is set to clear it (this may be overnight).

8) If there is a STOP showing in the standard heading of a student screen, use the screen transfer field to transfer to SIQSTP, to see the current status of that STOP. A STOP that has been TEMP CLRd still shows as a STOP on those screens.

9) Sign off the system by pressing <pf12> from the main menu before you turn off your machine; this will help to keep your session secure.