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### Introduction to the Financial Aid Reporting System

#### Purpose of FARS
The University System Office has worked in conjunction with institutional financial aid directors on a new data collection effort to track student financial aid information. The web-based Financial Aid Reporting System (FARS) for editing and submitting data is the result.

Previous data collections were survey-based and concentrated on aggregated institution-level data. However, current needs require an analysis of student-level data to answer financial aid policy questions. Research questions include the effects of need and non-need based financial aid on student retention, graduation, and the performance of students receiving various forms of HOPE scholarships.

The Georgia Enhanced Banner Student and Financial Aid Systems, versions 8.9.3 include the enhancements for FARS.

The Georgia Banner Enhancement 8.9.3 Financial Aid Reporting System for FARS 1011 collection includes enhancements to the FARS extraction process (ZORFARS) and FARS Editor. The extraction includes the removal requirement that all sorxref values must have been used in the aidyr being run.

FARS requires creation and submission of a data file. For institutions utilizing the GeorgiaBEST delivered ZORFARS Data Extraction Process (ZORFARS), you must use the Release of Georgia Enhancements 8.9.3.

**DOCUMENTATION:** This release includes the following documentation:

- Technical Release Notes for Georgia Enhancements 8.9.3

Documentation posted on the GeorgiaBEST Production Support Web site


Documentation is also available on [ftp.usg.edu](ftp.usg.edu) at:

- [ftp.usg.edu](ftp.usg.edu) at:

  banner/prod/gamod/8/89/893

**RELEASE LOCATION:** This release and accompanying documentation are available on [ftp.usg.edu](ftp.usg.edu) in the following directory:

- [ftp.usg.edu](ftp.usg.edu) at:

  banner/prod/gamod/8/89/893
PREREQUISITES: The prerequisites for the Georgia Enhancements 8.9.3 release are:

- Accounts Receivable 8.2
- Financial Aid 8.11
- General 8.3
- Student 8.3
- Georgia Enhancements 8.7

CERTIFICATION: This release has also been certified at the following:

- Accounts Receivable 8.3
- Financial Aid 8.12
- General 8.4
- Student 8.4.1
- Georgia Enhancements 8.9.2

Implementation deadline

Beginning in Fall 2011 and future collections, financial aid data should be submitted annually using FARS on an award year basis.

Target audience

Financial Aid Directors and Officers

Using this document

This document includes specifications and instructions for creating the data file that your institution submits through FARS.

Support

MORE INFORMATION and SUPPORT: For a production down, business interrupting (emergency) situation, call the ITS Helpdesk immediately at 706-583-2001 or 1-888-875-3697 (toll free within Georgia). For anything else, contact the ITS Helpdesk at http://www.usg.edu/customer_services (self-service support request requires a user ID and password, contact the ITS Helpdesk to obtain self-service login credentials) or e-mail helpdesk@usg.edu.
Additional Resources

Resources for FARS are located at the following URL:

http://www.usg.edu/research/datasys/fars/

- Financial Aid Data Elements Dictionary containing the SOAXREF Regent's Fund Codes
- Financial Aid Records File Layout
- FARS Edits
- User Documentation for the Financial Aid Reporting System (FARS) for Banner and Non-Banner Institutions
- Creating a Cross-Reference Table in Banner providing specific instructions for translating data in Banner on STVXLBL and SOAXREF

Specifications for FARS

Minimum browser requirements

The minimum specifications for using FARS are as follows:

- Required browser is Internet Explorer 5.0 (minimum).
- JavaScript must be enabled.

If JavaScript is not enabled, the user cannot view FARS and cannot begin the process. If Button(s) are not visible, enable JavaScript and reload page.

JavaScript also checks to ensure that the browser version is correct. If the version is not correct, the following warning appears:

Does NOT meet the minimum version requirement Microsoft Internet Explorer 5.0 for this application! Please upgrade your Browser.

Follow these steps to enable JavaScript in Internet Explorer:

1. From the browser menu, select Tools.
2. Select Internet Options.
4. Select Custom Level in Security Level for this zone.
5. Scroll down to Scripting.
6. Select Enable from Scripting of Java applets.
7. Select OK to save new Security Settings.
8. Select OK to save new Internet Options.
9. From the browser toolbar, select Refresh.
Overview of Steps in FARS Data Submission

The FARS process for Banner and non-Banner schools is identical except for preparing the institutional data file for submission.

Steps for non-Banner institutions
1. Create a FARS data file at your institution.
2. FTP file to usgdata.usg.edu.
3. Log in to the USG portal at the following URL:
   http://www.usg.edu/information_technology_services/webapps/
4. Validate data.
5. Save and print Validation Report.
6. Search for student errors.
7. Submit data.

Steps for Banner institutions
1. Run the FISAP process (RORFS11) first before running the ZORFARS extraction process.
2. Create a ZORFARS file using job submission (GJAPTCL)
3. FTP file to usgdata.usg.edu.
4. Log in to the USG portal at following URL:
   http://www.usg.edu/information_technology_services/webapps/
5. Validate data.
7. Search for student errors and correct them in Banner.
8. Submit data.

Illustration
The following figure illustrates the steps in the FARS process.
Please note: Run the FISAP process (RORFS11) first before running the ZORFARS extraction process.

Financial Aid Reporting System Submission Process

1. Create institutional data file
2. FTP data file to usgdata.usg.edu
3. Log in to FARS using USG portal at www.usg.edu/oi/t/eas/fcornelbapps.html
4. Validate data
5. Save and print Validation Report
6. Correct student records with errors
7. Submit data
Create Data Files and FTP to USG Data

Before accessing FARS to edit and submit data, both Banner and non-Banner institutions create data files and send them to usgdata.usg.edu.

1. Create a data file at the institution before sending data to the central server.

   See additional resources at http://www.usg.edu/research/datasys/fars/

2. Name the data file fa_XXXXXX where XXXXXX is your 6-digit FICE institution code.

3. FTP the data file to usgdata.usg.edu using your FICE code (preceded by the ‘s’) as your ID and your FTP password.
   
   Note: The only time that you use the ‘s’ is when you FTP the file.
   
   If you do not know your password, contact the OIIT Solution Center for assistance.

Banner institutions create data file and FTP

1. Banner institutions must go into the Banner Job Submission Control Form (GJAPCTL) to enter and start the Financial Aid Reporting Process (ZORFARS).

   Create file in ZORFARS

   ![Banner Job Submission Control Form](image-url)
2. Follow these steps to prepare the data file for your institution:
   - In the Process block enter ZORFARS and hit the Tab key.
   - Hit Next Block to get to the printer section and type in NOPRINT.
   - Hit Next Block to get to the Parameter Value section.
   - Enter values for the two following parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 Aid Year</td>
<td>Example: 0001</td>
</tr>
<tr>
<td>02 Do you disburse FFELP Loans?</td>
<td>Y for Yes or N for No</td>
</tr>
</tbody>
</table>

   **Note:** Institutions that disburse FFELP loans using Banner [RPRATRM_PAID_AMT] should select “Y” for this parameter. For institutions that select “N” for this parameter, the process extracts the amount from [RPRATRM_ACCEPT_AMT].

   - Hit Next Block to get to the Submission section.
   - Click the Submit option.
   - From the file menu or the tool bar, select Save to submit. The process automatically names the file fa_XXXXXX where XXXXXX is your institution’s 6-digit FICE code.

3. When job submission is complete, FTP the data file to usgdata.usg.edu using your FICE code (with the ‘s’) as your ID and your ftp password.

   **Note:** The only time that you use the ‘s’ is when you FTP the file.

   If you do not know your password, contact the OIIT Solution Center for assistance.

To obtain instructions for translating data on STVXLBL and SOAXREF, see *Creating a Cross-Reference Table in Banner* at the following URL

http://www.usg.edu/research/datasys/fars/
Log in to FARS

Once you have created and FTP’d the data files, both Banner and non-Banner institutions follow the same log-in procedures.

Access portal

Access the USG portal at the following URL:

http://www.usg.edu/information_technology_services/webapps/

Click the eas portal button. A new window opens in the browser. This window does not include the navigation bar, so normal browser navigation tools are not available. In addition, there is a prompt to close the ‘old’ window.
Click **Yes** to close the window.

Log in to the portal using your FICE code (without the ‘s’) as your user ID and your FTP password.
Click **Portal Systems**.

Access FARS

Select **Financial Aid Reporting System** from the menu.

Printing

While in FARS, you do not have access to your web browser toolbar. There is no print option in FARS. To print, highlight, copy, and paste into a word processing program and then print from that program.
However, if the administrator has not opened the system and you try to log in, you will see the following screen:

![System closed screen](image)

**Validate Data**

Use FARS to validate and edit your data before you submit it.

- **Validate data**

  On the FARS main menu, click the **Validate Data** button.

![Validate Data button](image)
A Validating Data, please wait… screen will appear.

When the Financial Aid Edit Report appears with a dialog box indicating instructions for save and print options, click OK.

To obtain a listing of students IDs, print this report.

Click the Back to Main Menu button.

If you see errors, correct the data in your student information system, FTP a new file, and then re-run the Validate Data process.

You cannot correct the data in FARS.
Correct Data Using Student Info Search

Use the Student Information Search function to locate the students identified as having errors. You can also use this function to locate any student record.

**View student records**  Click the **Student Info Search** button to view student records.

Enter a student SSN and click the **Search** button or click the **Back to Main Menu** button to return to the main menu.
Select **Student IDs Submitted** to obtain a list of all student social security numbers.

Obtain extraction report

Select student social security number to obtain Extraction Report that shows the student Extracted Term Values and the Extracted Values for the Fiscal Year.

Print report

To print a copy of the Extraction Report, highlight the text, copy and paste into a word processing document, and then print from the word processing program.
### Financial Aid Reporting System

#### Information Technology Services, ITS

#### User Documentation for FARS for Banner and Non-Banner Institutions

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**October 2011**

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**Financial Aid Reporting System**

08-00-2001 10:20:14 AM

**Extraction Report**

** ELEMENT TITLE ** | ** ELEMENT NUMBER ** | ** VALUES BY TERM **
--- | --- | ---
Financial Aid Reporting System | F000 | 101.009
Information Technology Services, ITS | F100 | 001.000
User Documentation | F200 | 016.000

**Extracted Term Values For**

**ELEMENT TITLE** | **ELEMENT NUMBER** | **VALUES BY TERM**
--- | --- | ---
Financial Aid Reporting System | F000 | 001.009
Information Technology Services, ITS | F100 | 001.000
User Documentation | F200 | 016.000

---

**Extracted Values For**

**Fiscal Year 2001**

**ELEMENT TITLE** | **ELEMENT NUMBER** | **VALUES**
--- | --- | ---
Financial Aid Reporting System | F000 | 101.009
Information Technology Services, ITS | F100 | 001.000
User Documentation | F200 | 016.000

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**Version 1.0 - November 2001**

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**Back to Main Menu**
Click the **Back to Main Menu** button to return to the Main Menu.

**Correct errors**

If you have errors, continue to correct the data in your student information system.

**FTP corrected file**

After you have corrected all errors, ftp the file again.

**Repeat process**

Re-run the Validate Data process again. Repeat until no errors remain.

### Verify Summary Report

The Summary Report shows the grand total for each fund type of award for the institution and overall grand fund totals.

#### Verify summary report

Check the Summary Report to verify the totals. You may want to print this report. Look at the totals to see if they are consistent with what you expected.

#### Financial Aid Data Submission Summary Report

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Fund Source</th>
<th>Fund Name</th>
<th>Fund Total - Undergraduate</th>
<th>Fund Total - Graduate</th>
<th>Fund Total - Professional</th>
<th>Fund Total - Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loans</td>
<td>Federal</td>
<td>3,697,355</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Loans</td>
<td>Federal</td>
<td>2,574,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Loans</td>
<td>Federal</td>
<td>263,177</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Loans</td>
<td>Federal</td>
<td>391,280</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>Federal</td>
<td>1,286,742</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>Federal</td>
<td>99,619</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>Federal</td>
<td>10,265</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>Federal</td>
<td>9,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>Federal</td>
<td>3,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>Institutional</td>
<td>34,390</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>State</td>
<td>2,307,115</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>State</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>State</td>
<td>4,410</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Need-Based Grant</td>
<td>State</td>
<td>81,500</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Work Study</td>
<td>Federal</td>
<td>122,524</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Print report**

Another window opens that gives you a print option. The main window remains open.
Submit Data

Submit data

When the data are free of errors, return to the Main Menu and click the Submit Data button.

You will see either a message that your submission was successful or that you have data errors to correct.

A Submit Successfully Completed screen indicates that you are finished with the data collection process.

Click the Back to Main Menu button to return to the main menu.
A **Cannot Submit Data with errors** screen indicates that you have errors in the data. Correct the data in your student information system, ftp the file, and re-run the **Validate Data** process. Follow the previous steps on the **Validate Data** process.

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### View your Summary Report after Submitting

**View Summary Report**

After you have submitted your data successfully, the USO administrator will close the system for your institution. However, you can still log in to FARS through the USG portal and view your Summary Report. When you log in, you will see the following screen.
Requesting Support

MORE INFORMATION and SUPPORT: For a production down, business interrupting (emergency) situation, call the ITS Helpdesk immediately at 706-583-2001 or 1-888-875-3697 (toll free within Georgia). For anything else, contact the ITS Helpdesk at http://www.usg.edu/customer_services (self-service support request requires a user ID and password, contact the ITS Helpdesk to obtain self-service login credentials) or e-mail helpdesk@usg.edu.