



Using Title IV Online Authorizations

Georgia Enhanced Banner Student and Financial Aid Systems User Documentation

Version 8.9.1

Information Technology Services

August 2011

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Table of Contents

Introduction	1
Purpose	1
Target Audience	1
Purpose and Scope of Document	1
Graphics.....	1
References.....	1
Support.....	2
Title IV Process Flow	3
Description	3
Overview	3
Implementing Title IV Online Authorizations	4
<i>I. Administering Web Tailor.....</i>	<i>4</i>
1. Log in to Banner Self-Service Secure Area.....	4
2. Select New Web Tailor Administration.....	5
3. Select Information Text label	5
4. Modify Information Text	8
5. Assigning Appropriate Privileges	11
6. Exit Web Tailor Administration Menu.....	12
<i>II. Building Rules</i>	<i>13</i>
1. Create Validation Codes.....	13
2. Modify Rules.....	13
<i>III. Executing Authorizations</i>	<i>15</i>
1. Log Into Banner Self-Service.....	15
2. Select Authorizations	16
3. Verify authorizations.....	17
4. Confirm authorizations.....	17
Important.....	17
5. Navigate to Authorization Web Page	18
<i>IV. Verification of Authorizations</i>	<i>19</i>
Appendix A: Document History	A-1
Appendix B: Process Flow	B-1

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Using Title IV Online Authorizations

Introduction

Purpose

Students use Georgia Banner Enhanced Financial Aid Online Authorizations to provide authorization for handling of funds categorized as Title IV funds. The authorizations follow federal and state guidelines.

The Georgia Enhanced Title IV Authorization process includes both Banner baseline and Georgia requirements.

Target Audience

Web Tailor Administrators and Business Officers

Purpose and Scope of Document

This chapter explains how to implement the Georgia Enhanced version of Title IV Authorization that accommodates University System of Georgia needs and requirements.

This section includes the following topics:

- Title IV Process Flow
- Using Title IV Authorization
 - Web Tailor Administration
 - Build Rules
 - Executing Authorization (Student Instructions)
 - Verification of Authorizations
- Document History

Graphics

Graphic cues used in this document assist with labeling of steps and items that are particularly important.



Steps for recovery or support.



For additional information, see references.



Exercise caution.



Warning: an error here is critical.

References



For information about the baseline product, see the *SGHE Banner Financial Aid, Accounts Receivables, and Student User Guides*.

Support



For additional ITS resources and support, contact the ITS Helpdesk:

- Web support request self-service:
http://www.usg.edu/customer_services
- E-mail: Helpdesk@usg.edu

For emergency, business interruptions, or production down situations, call the ITS Helpdesk immediately

- 706-583-2001
- Toll free within Georgia: 1-888-875-369

Title IV Process Flow

Description

The Title IV process allows students to view and update their authorizations for Title IV funds through the Banner Self-Service Application.

The process requires set up within the Banner application and through Web Tailor Administration.

Overview

I. Administering Web Tailor

1. Log into the secure area of Banner Self-Service
2. Select New Web Tailor Administration
3. Select Information Text label
4. Modify Information Text
5. Assign privileges for authorization
6. Exit Web Tailor



II. Building Rules

- | | |
|----------------------------|---------|
| 1. Create validation codes | TVVAUTH |
| 2. Modify rules | GTVSDAX |



III. Executing Authorizations (Student Instructions)

1. Log in to Banner Self-Service
2. Select Authorizations
3. Verify authorizations
4. Confirm authorizations
5. Navigate to main Authorization page



IV. Verification of Authorizations

- | | |
|--|---------|
| 1. Log in to Banner | |
| 2. Confirm student's authorizations appear | TVAAUTH |

Implementing Title IV Online Authorizations

I. *Administering Web Tailor*

Overview

The institutional Web Tailor Administrator maintains, changes, and customizes information text for the local procedures:

1. Authorization Page from logon and Main Authorization page: ztgkauth.zp_authorize
2. Verification Web Page: ztgkauth.zp_verify
3. Confirmation Web Page: ztgkauth.zp_confirm

Warning



The procedure and information text for ztgkauth.zp_authorize_from_login should **not** be modified through Web Tailor.

Additional setup may be required in Banner Self-Service if your institution does not have a local Financial Aid Web page already.

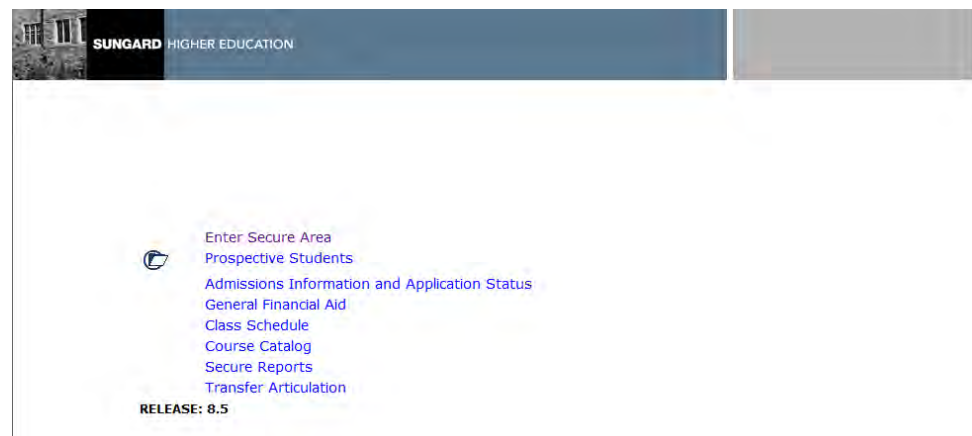
Important



There are no steps to copy from baseline menus to local Web menus for Banner 8.x. A script has been created to generate Web menu links for local authorization menus. The following steps are required to customize information text.

1. Log in to Banner Self-Service Secure Area

Select **ENTER SECURE AREA** from the Banner Self-Service menu.



Enter the User ID and PIN for the institutional Web Tailor Administrator and click the **LOGIN** button.

Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select Login.

Please Note: ID is Case Sensitive

To protect your privacy, please Exit and close your browser when you are finished.

User ID:

PIN:

RELEASE: 8.5

2. Select New Web Tailor Administration

Select **NEW WEB TAILOR ADMINISTRATION** from the **MAIN MENU**.

[Personal Information](#) [Alumni and Friends](#) [Advancement Officers](#) [Student](#) [Financial Aid](#) [Employee](#) [Finance](#)

Search

Main Menu

Welcome, One Student, to the OIIT & Information System! Last web access on Jul 20, 2012 at 02:11pm

[Personal Information](#)
Update addresses, contact information or marital status; review name or social security number change information; Change your PIN; Customize your directory profile.

[Alumni Services](#)
Find a classmate; Communicate with your alma mater; Update career advisor information; Enter a job posting; Make a pledge; Review giving history; Become a volunteer; Update donation on-line using your credit card.

[Development Officers](#)
Search for a constituent, organization or prospect; Enter contact information and a call report; Review constituent or organization profile, prospect profile, giving history, alternate preferences for profile information.

[Employee Information](#)
Enter hours on Time Sheets; Request time off; View or change your benefits information; View your leave history or balances, job information, pay stubs, W-2 or T4 forms; Char requisitions, purchase orders & budget transfers; **Query** budget & encumbrance data; **Approve** Documents; **View** Document details and more.


[Transfer Articulation](#)

[Return to Homepage](#)

RELEASE: 8.5

3. Select Information Text label

Select the **Information Text** option.



SUNGARD HIGHER EDUCATION

[Personal Information](#)
[Alumni and Friends](#)
[Advancement Officers](#)
[Student](#)
[Financial Aid](#)
[Faculty Services](#)
[Employee](#)
[WebTailor Administration](#)


Search RET

WebTailor Menu

- [Web Menus and Procedures](#)
 - [Menu Items](#)
 - [Information Text](#)
 - [User Roles](#)
 - [Web Rules](#)
 - [Web Modules](#)
 - [Global User Interface Settings](#)
 - [WebTailor Parameters](#)
 - [Graphic Elements](#)
 - [Login Return Location](#)
 - [WebTailor Overrides](#)
 - [Advancement Self-Service Rules](#)
 - [LDAP Administration](#)
 - [Navigation Bar](#)
- Add or update a navigation Bar

RELEASE: 8.5

Select ztgtkauth.zp_authorize from the list of procedures, which directs you to the Customize Information Text screen.




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[Personal Information](#)
[Student Services & Financial Aid](#)
[Financial Aid](#)
[Faculty Services](#)
[New WebTailor Administration](#)

Search RETURN TO THE WEB TAILOR MENU SITE MAP HELP EXIT

Select Information Text to Customize

-  Search for a web menu or procedure for which you wish to customize an information text entry..
- 1) Search text is not case sensitive.
 - 2) If text is entered in 'Name' then the text in 'Description' is ignored.
 - 3) You may use wildcards for searching. i.e. % = match any number of characters _ = match 1 character.
 - 4) If no % is entered then a match will be found if the text is located anywhere in the field. i.e. if you enter car, matches will be found on Carolina, macaroni, and boxcar

Search by Name: OR Search by Description:

Select one of the available procedures

Procedure Name	Procedure Description	Enabled Source	
DGCSU_ACADEMIC_ASSISTANCE.regents	Regents Download	Y	L
DGCSU_ACADEMIC_ASSISTANCE.regents_form	Regents Download	Y	L
DGCSU_ADMISSIONS.applied	Applicants for Admissions	Y	L
DGCSU_ADMISSIONS.applied_form	Applicants for Admissions	Y	L
DGCSU_ADMISSIONS.recrappl_form	High School Applied/Recruits	Y	L
DGCSU_ADMISSIONS.recrep	Recruit Report	Y	L
DGCSU_ADMISSIONS.recrep_form	Recruit Report	Y	L
DGCSU_ADMISSIONS.telec	Telecounseling Report	Y	L
DGCSU_ADMISSIONS.telec_form	Telecounseling Report	Y	L
DGCSU_ADMISSIONS.withdraw	Withdraw Report	Y	L

The screenshot shows a web page titled "Reorder or Customize Information Text" for the procedure "ztgkauth.zp_authorize". It features a table with the following entries:

Seq	Label	Source Information Text
1	Default	Local Please verify your authorizations and press the SUBMIT button to confirm.
2	FA_HEAD	Local This authorization is valid from the date of completion through the date of graduation. Student has the right to rescind the following authorizations at an account in writing to the Office of...
3	FOOT	Local By clicking Submit, you authorize us to act on transaction instructions and you agree this authorization has the same effect as your written signature.
4	HB	Local Georgia's HOPE Scholarship Program: Program regulations require students to authorize the use of HOPE Scholarship funds towards payment of additional expenses such as housing, meals, etc. are eligible for the HOPE Scholarship, and you wish to use any excess funds to cover other expenses, you must authorize INSERT YOUR INSTITUTION HERE these charges. You may rescind this authorization at any time prior to incurring such payment of charges, but you may not cancel it once such payment is made. I acknowledge that I am not fully registered until my current term fees and any other amounts currently owed to the INSERT YOUR INSTITUTION HERE are paid. I authorize INSERT YOUR INSTITUTION HERE to apply HOPE Scholarship proceeds to all charges in addition to tuition and fees that are assumed for educational mandatory fees not covered by HOPE, books, supplies, miscellaneous fees, charges and fines, emergency loans and other expenses.
5	HLD	Local CREDIT BALANCE AUTHORIZATION: Once Federal Title IV financial aid funds are disbursed to your student account to be applied to tuition, fees, room and board, funds provided may exceed to leave those funds on their student account for future charges. By authorizing this action, a refund for Federal Title IV funds will not be provided, and the charges including those, which may arise from next semester's tuition and fees. This authorization may be rescinded at any time. I authorize INSERT YOUR INSTITUTION HERE to apply any credit balance that may result on my student account from application of Federal aid, loan funds be applied to future charges.
6	LOGIN_HEAD	Local This authorization is valid from the date of completion through the date of graduation. Student has the right to rescind the following authorizations at an account in writing to the Office of...
7	PY	Local PRIOR YEAR CHARGES AUTHORIZATION: Federal Title IV financial aid funds are restricted to payment of current period tuition, fees, room and board. Students may authorize use of these funds for INSERT YOUR INSTITUTION HERE to use your Title IV financial aid funds in this manner, please indicate your choice below. I authorize INSERT YOUR INSTITUTION HERE to use Federal Funds/aid for prior year charges.
8	TIV	Local FEDERAL FUNDS AUTHORIZATION: Program regulations permit students to authorize use of Title IV financial aid funds for non-institutional expenses such as books and supplies, parking fee are eligible for Federal financial aid in excess of tuition and fees, and you wish to use the excess to cover other charges (e.g. books, insurance, parking, etc) must authorize INSERT YOUR INSTITUTION HERE to pay these charges from your account balance. You may rescind this authorization at any time prior to incurring such payment of charges, but you may not cancel it once such charges have been paid on your behalf. This authorization is valid for funds in excess of tuition and fees based on your financial aid. I authorize INSERT YOUR INSTITUTION HERE to apply the credit balance derived from Federal Funds/aid to charges to my student account for other goods.

Below the table are buttons for "Copy Baseline entries to Local", "Add a New Information Text Entry", and "Customize the Associated Web Menu or Procedure". At the bottom, it says "Select another set of Information Text to customize" and "RELEASE: 8.5".

The labels for the Information Text on the ztgkauth.zp_authorize procedure must match the Crosswalk Validation form (GTVSDAX) values for the authorization questions. The delivered values are:

PY – Pay Prior Year charges

HLD – Hold credit balance

TIV – Pay non-institutional charges

***** HB – previously used for HOPE Book authorization*****

Additionally, the FA_HEAD label contains the heading text of the main authorization Web page accessed from the Financial Aid menu.

The label LOGIN_HEAD contains the heading text of the authorization

The FOOT label displays text Web page accessed from the login for students with matching Title IV at the bottom of the page for both the main and login authorization Web pages.

4. Modify Information Text



Modify the Information Text on the **CUSTOMIZE THE SELECTED INFORMATION TEXT ENTRY** Please be sure to change all instances of **INSERT YOUR INSTITUTION HERE** in the authorization Information Text, and add the Office name to both the **LOGIN_HEAD** and the **FA_HEAD**.

Please review all Information Text prior to release to determine if default values are appropriate for your institution, and then submit changes.

A message displays stating the changes have been successfully saved in the **REORDER OR CUSTOMIZE INFORMATION TEXT** window.

Seq #	Label	Source	Information Text
1	Default	Local	Please verify your authorizations and press the SUBMIT button to confirm.
1	FA_HEAD	Local	This authorization is valid from the date of completion through the date of graduation. Student has the right to rescind the following authorizations at any time by submitting a withdrawal of consent in writing to the Office of...
1	FOOT	Local	By clicking Submit, you authorize us to act on transaction instructions and you agree this authorization has the same effect as your written signature.
1	HE	Local	Georgia's HOPE Scholarship Program: Program regulations require students to authorize the use of HOPE Scholarship funds towards payment of additional expenses such as housing, meals, parking fees, and mandatory fees. If you are eligible for the HOPE Scholarship, and you wish to use any excess funds to cover other expenses, you must authorize INSERT INSTITUTION HERE to apply your HOPE award to pay for these charges. You may rescind this authorization at any time prior to incurring such payment of charges, but you may not cancel it once such payment of charges has been made on your behalf. I acknowledge that I am not fully registered until my current term fees and any other amounts currently owed to the INSERT YOUR INSTITUTION HERE are paid in full. I authorize INSERT YOUR INSTITUTION HERE to apply HOPE Scholarship proceeds to all charges in addition to tuition and fees, that are incurred for educationally related activities, including mandatory fees not covered by HOPE, books, supplies, miscellaneous fees, charges & fines, emergency loans & other expenses.

Default Information Text is not delivered for the Verify and Confirm Web pages. You can add text to these pages, if desired.

To add Information Text for the Verify or Confirm Web pages, click **SELECT ANOTHER SET OF INFORMATION TEXT TO CUSTOMIZE** from the bottom of the **REORDER OR CUSTOMIZE INFORMATION TEXT** window, or select **CUSTOMIZE A SET OF INFORMATION TEXT** from the **NEW WEB TAILOR ADMINISTRATION** main menu page. Next, select the procedure name, `ztgkauth.verify`, from the drop-down list. On the **REORDER OR CUSTOMIZE INFORMATION TEXT** window, click the **ADD A NEW INFORMATION TEXT** button.

The screenshot shows the SUNGARD Higher Education Web Tailor Administration interface. The top navigation bar includes links for Personal Information, Alumni and Friends, Advancement Officers, Student, Financial Aid, Faculty Services, Employee, Web Tailor Administration, and Finance. A search bar is present with a 'Go' button. The main content area is titled 'Create a new Information Text Entry'. Below this, there is a message: 'Please update the information and Submit Changes.' A red asterisk indicates a required field. The form fields are: 'Local' (highlighted), 'Associated Web Page: ztgkauth.zp_authorize', 'Sequence Number: 2', 'Select Label: * (empty dropdown) - OR -', 'Information Text: (empty text area)', 'Image: (empty dropdown) - Preview Image', and 'Comment: (empty text area)'. At the bottom, there are 'Submit Changes' and 'Reset All Fields' buttons. The release version is noted as 'RELEASE: 8.5'.

For the value of **SELECT LABEL**, type in the value **DEFAULT**. Then, in the **INFORMATION TEXT** window, add any text that you would like to display.

This screenshot is identical to the previous one, but the 'Select Label' dropdown menu is now set to 'Default'. The rest of the form and interface elements remain the same.

When finished, click the **SUBMIT CHANGES** button. You should receive a message that your changes were saved successfully on the **REORDER OR CUSTOMIZE INFORMATION TEXT** window.

SUNGARD HIGHER EDUCATION

Personal Information Student Services & Financial Aid Financial Aid Faculty Services **New Web Tailor Administration**

search [] (Go) SITE MAP HELP EXIT

Reorder or Customize Information Text

Your changes were successfully saved.

Select the associated label to update individual information text entry.

Information text for: ztgkauth.zp_authorize

Seq #	Label	Source	Information Text
1	Default	Local	Please verify your authorizations and press the SUBMIT button to confirm.
1	FA_HEAD	Local	This authorization is valid from the date of completion through the date of graduation. Student has the right to rescind the following authorizations at any time by submitting a withdrawal of consent in writing to the Office of....
1	FOOT	Local	By clicking Submit, you authorize us to act on transaction instructions and you agree this authorization has the same effect as your written signature.

5. Assigning Appropriate Privileges

It may be necessary to create appropriate privileges for authorizations in order for the ztgkauth.zp_authorize_from_login package to work appropriately. Perform the following steps:

- 1 – Log in as the Web Tailor Administrator
- 2 – Select the “Web Menus and Procedures” option.
- 3 – Select the ztgkauth.zp_authorize_from_login package.
- 4 – Under Local Roles, select either the Faculty box or All Web Users so that the package is recognized as having the appropriate privileges.

Customize a Web Menu or Procedure

Please update the information and Submit Changes.

* - indicates a required field.

	Local	Baseline -Indicates different local value
Page Name: *	ztgkauth.zp_authorize_from_login	ztgkauth.zp_authorize_from_login
Description: *	Authorize	Authorize
Module: *	Financial Aid	Student Services
Comments:		
Enabled Indicator:	<input checked="" type="checkbox"/>	Yes
Non Secured Access Allowed:	<input type="checkbox"/>	No
Web Page Caching Override:	Use System Setting	Use System Setting
Page Title:	Authorize	Authorize
Header Text:	Authorize	Authorize
Header Graphic:	Select	Preview Image
Page CSS URL:		
Map Title:		
Help Link URL:		
Help CSS URL:		
Print CSS URL:		
Back Link URL:	bmenu_P_FinAidMainMnu	
Back Link Text:		
Back Link Image:	Select	Preview Image
Back Link Menu Indicator:	<input type="checkbox"/>	No
Admin Secured:	<input type="checkbox"/>	No

Associated Roles

Baseline	Local Role
No	<input checked="" type="checkbox"/> All Web Users
No	<input type="checkbox"/> Alumni
No	<input type="checkbox"/> Employee
No	<input type="checkbox"/> Executive
No	<input type="checkbox"/> Faculty
No	<input type="checkbox"/> Faculty Feedback Administrator
No	<input type="checkbox"/> Financial Aid Snapshot Admin
No	<input type="checkbox"/> Financial Aid Staff
No	<input checked="" type="checkbox"/> Financial Aid user
No	<input type="checkbox"/> Proxy Access
No	<input type="checkbox"/> Proxy Access (Support Enabled)
No	<input type="checkbox"/> Proxy Global Access
No	<input type="checkbox"/> Proxy Management
No	<input checked="" type="checkbox"/> Student
No	<input checked="" type="checkbox"/> Web Tailor Administrator
No	<input type="checkbox"/> Web Tailor PROXYACCESS (GORRSQL Override)
No	<input type="checkbox"/> Web Tailor PROXYMGMT (GORRSQL Override)
No	<input type="checkbox"/> Web for Executives Administrator

[Select another Web Menu or Procedure to customize](#)

RELEASE: 8.5

**6. Exit Web
Tailor
Administration
Menu**

Exit the **WEB TAILOR ADMINISTRATION MENU** to return to the **MAIN MENU**. The entries required in Web Tailor are complete.

II. Building Rules

1. Create Validation Codes



Validation codes must exist in the Authorization Validation form (TVVAUTH) before accepting authorizations for a student. These values must match the Web Tailor Label values.

Authorization Code	Description	System Required	Activity Date
HOPE	HOPE Book	<input checked="" type="checkbox"/>	01-NOV-2005
HLD	Hold excess TIV funds for future	<input checked="" type="checkbox"/>	16-FEB-2000
PY	Pay Prior Year non-inst charges	<input checked="" type="checkbox"/>	22-JUL-2009
TIV	Pay non-inst charges with Title IV	<input checked="" type="checkbox"/>	10-FEB-2000
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

Note: Authorizations created are validated against this form and are created in TVVAUTH. These authorizations will impact refunding.

2. Modify Rules



Rules for Title IV Online Authorizations in the Crosswalk Validation form (GTVSDAX) define which authorizations to display and the order of display. Default values are delivered in scripts.

Query for all values matching the Internal Group as RGTAUTH. Two Internal Codes are delivered:

1. FDRL: Title IV authorizations
2. **HOPE: Previously used for HOPE Scholarship Authorizations***

The External Code must match the Web Tailor Information Text Label for the authorization. Additionally, the External Code must also match the codes defined on TVVAUTH.

Crosswalk Validation GTVSDAX 8.0

----- Internal -----

Code: RGTAUTH **Sequence:** 1 **Group:** AUTHORIZATION **External Code:** HB
Description: Hope Authorization **Translation Code:**
Reporting Date: System Required **Activity Date:** 28-OCT-2005

Code: RGTAUTH **Sequence:** 2 **Group:** AUTHORIZATION **External Code:** HLD
Description: Federal HLD Authorization **Translation Code:**
Reporting Date: System Required **Activity Date:** 26-OCT-2009

Code: RGTAUTH **Sequence:** 3 **Group:** AUTHORIZATION **External Code:** PY
Description: Federal PY Authorization **Translation Code:**
Reporting Date: System Required **Activity Date:** 26-OCT-2009

Code: RGTAUTH **Sequence:** 4 **Group:** AUTHORIZATION **External Code:** TIV
Description: Federal TIV Authorization **Translation Code:**
Reporting Date: System Required **Activity Date:** 26-OCT-2009

III. Executing Authorizations

1. Log Into Banner Self-Service

Log in as a student with Title IV funds and no existing authorizations. Enter a student ID number and PIN in the **ENTER SECURE AREA** login screen.



Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select
Please Note: ID is Case Sensitive
To protect your privacy, please Exit and close your browser when you are finished.

User ID:

PIN:

RELEASE: 8.5

2. Select Authorizations

Changes should appear on the header if you have made changes to the Information Text for the Label **LOGIN_HEAD**. Authorization statements should exist for all values that have been defined in TVVAUTH, GTVSDAX and Web Tailor.

Use the drop-down box to select to **AUTHORIZE** a statement. Then, click the **SUBMIT** button.

Authorize

Georgia's HOPE Scholarship Program:

Program regulations require students to authorize the use of HOPE Scholarship funds towards payment of additional expenses such as housing, meals, parking fees, and mandatory fees. If you are eligible for the HOPE Scholarship, and you wish to use any excess funds to cover other expenses, you must authorize INSERT YOUR INSTITUTION HERE to apply your HOPE award to pay for these charges. **You may rescind this authorization at any time prior to incurring such payment of charges, but you may not cancel it once such payment of charges has been made on your behalf.**

I acknowledge that I am not fully registered until my current term fees and any other amounts currently owed to the INSERT YOUR INSTITUTION HERE are paid in full.

I authorize INSERT YOUR INSTITUTION HERE to apply HOPE Scholarship proceeds to all charges in addition to tuition and fees, that are incurred for educationally related activities, including mandatory fees not covered by HOPE, books, supplies, miscellaneous fees, charges and fines, emergency loans and other expenses.

Current Status: Options:
NONE | Authorize ▾

FEDERAL FUNDS AUTHORIZATION:

Program regulations permit students to authorize use of Title IV financial aid funds for non-institutional expenses such as books and supplies, training fees, or campus debt systems. If you are eligible for Federal financial aid in excess of tuition and fees, and you wish to use this excess to cover other charges (e.g. books, insurance, parking, laptop fees, resident life fees, etc.), you must authorize INSERT YOUR INSTITUTION HERE to pay these charges from your account balance. **You may rescind this authorization at any time prior to incurring such charges, but you may not cancel it once such charges have been paid on your behalf.** This authorization is valid for funds in excess of tuition and fees, based on your financial aid eligibility and enrollment status.

I authorize INSERT YOUR INSTITUTION HERE to apply the credit balance derived from Federal funds/aid to charges to my student account for other goods and services.

Current Status: Options:
NONE | Authorize ▾

PRIOR YEAR CHARGES AUTHORIZATION:

Federal Title IV financial aid funds are restricted to payment of current period tuition, fees, room and board. Students may authorize use of these funds for prior period expenses. To enable INSERT YOUR INSTITUTION HERE to use your Title IV financial aid funds in this manner, please indicate your choice below.

I authorize INSERT YOUR INSTITUTION HERE to use Federal Funds/aid for prior year charges.

Current Status: Options:
NONE | Authorize ▾

CREDIT BALANCE AUTHORIZATION:

Once Federal Title IV financial aid funds are disbursed to your student account to be applied to tuition, fees, room and board, funds provided may exceed those charges. Students may choose to leave those funds on their student account for future charges. By authorizing this action, a refund for Federal Title IV funds will not be provided, and the credit will be applied toward future charges including those, which may arise from next semester tuition and fees. **This authorization may be rescinded at any time.**

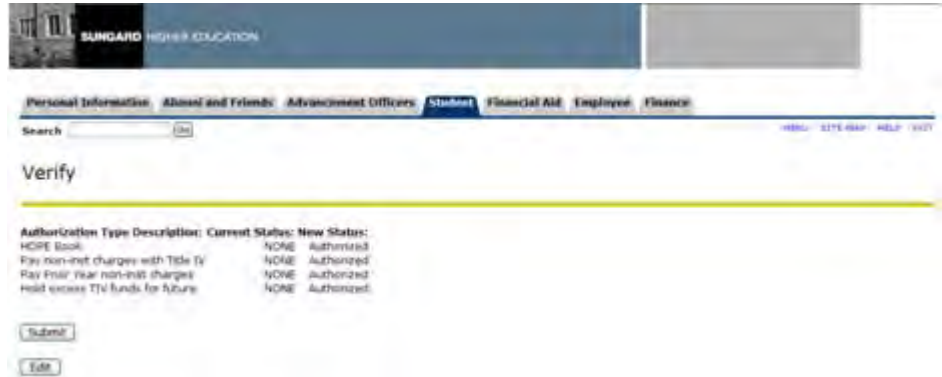
I authorize INSERT YOUR INSTITUTION HERE to apply any credit balance that may result on my student account from application of Federal aid, loan funds, scholarships, or other payments to be applied to future charges.

Current Status: Options:
NONE | Authorize ▾

By clicking Submit, you authorize us to act on transaction instructions and you agree this authorization has the same effect as your written signature.

3. Verify authorizations

The **VERIFY** Page will appear. Click the **SUBMIT** button to submit authorizations. If you added **INFORMATION TEXT** for procedure ztgkauth.zp_verify, the new text should be displayed here.



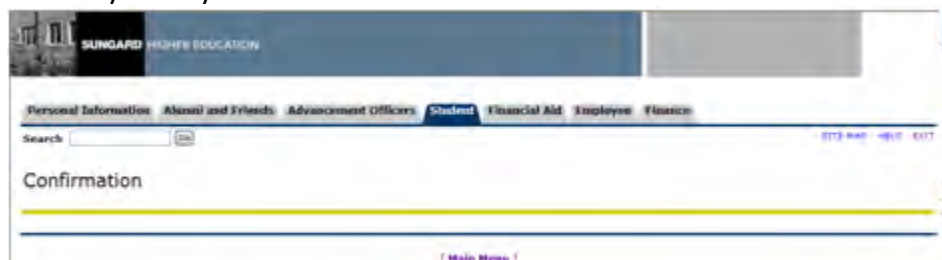
4. Confirm authorizations

The confirmation message should then appear. From this point, you can navigate directly to the Financial Aid menu or to the Main menu. If you added **INFORMATION TEXT** for procedure ztgkauth.zp_confirm, the new text should be displayed here.

Important

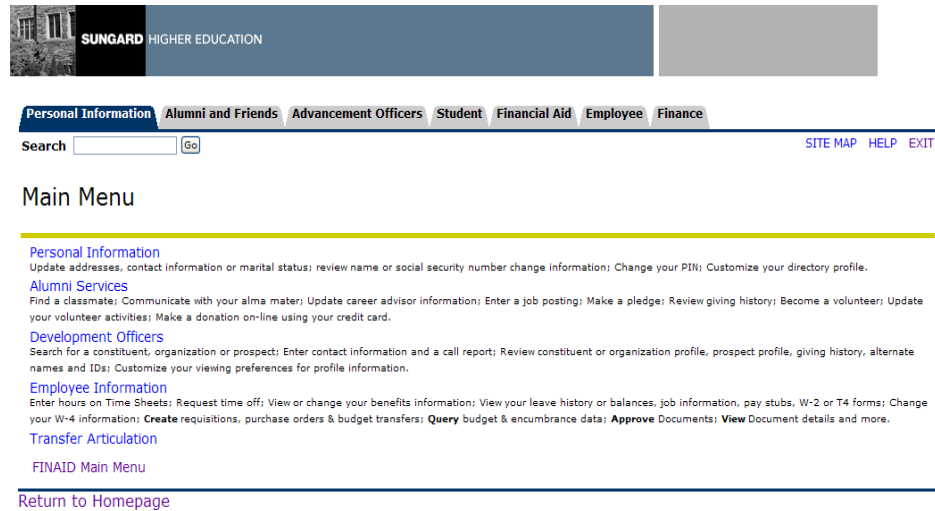


Note: If a student has not previously completed the Race & Ethnicity online survey, the Confirmation message, below, will only appear briefly. The student will be automatically directed to the Race & Ethnicity survey.



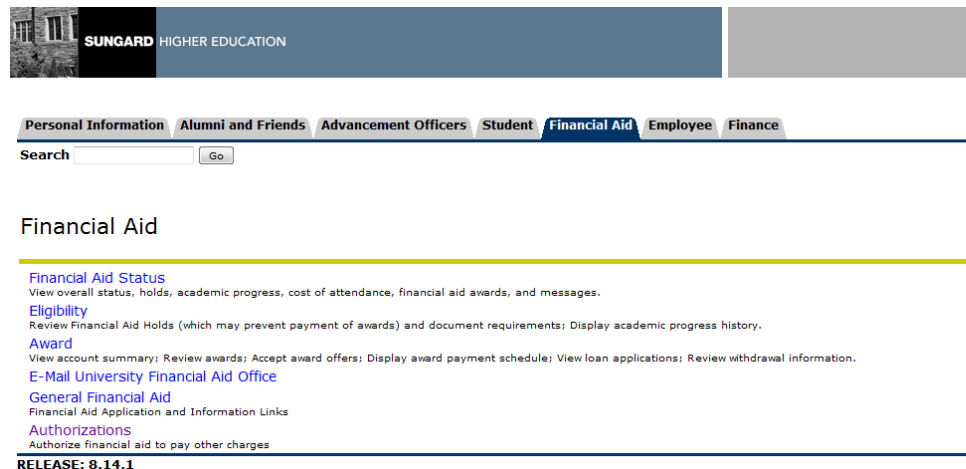
5. Navigate to Authorization Web Page

From the **MAIN MENU**, select **FINANCIAL AID**.



The screenshot shows the SUNGARD HIGHER EDUCATION website. The navigation bar includes: Personal Information, Alumni and Friends, Advancement Officers, Student, Financial Aid, Employee, Finance. A search bar is present with a 'Go' button. The 'Main Menu' section lists the following options: Personal Information (Update addresses, contact information or marital status; review name or social security number change information; Change your PIN; Customize your directory profile.), Alumni Services (Find a classmate; Communicate with your alma mater; Update career advisor information; Enter a job posting; Make a pledge; Review giving history; Become a volunteer; Update your volunteer activities; Make a donation on-line using your credit card.), Development Officers (Search for a constituent, organization or prospect; Enter contact information and a call report; Review constituent or organization profile, prospect profile, giving history, alternate names and IDs; Customize your viewing preferences for profile information.), Employee Information (Enter hours on Time Sheets; Request time off; View or change your benefits information; View your leave history or balances, job information, pay stubs, W-2 or T4 forms; Change your W-4 information; Create requisitions, purchase orders & budget transfers; Query budget & encumbrance data; Approve Documents; View Document details and more.), Transfer Articulation, and FINAID Main Menu. A 'Return to Homepage' link is at the bottom.

From the **FINANCIAL AID MENU**, select **AUTHORIZATIONS**.



The screenshot shows the SUNGARD HIGHER EDUCATION website. The navigation bar includes: Personal Information, Alumni and Friends, Advancement Officers, Student, Financial Aid, Employee, Finance. A search bar is present with a 'Go' button. The 'Financial Aid' section lists the following options: Financial Aid Status (View overall status, holds, academic progress, cost of attendance, financial aid awards, and messages.), Eligibility (Review Financial Aid Holds (which may prevent payment of awards) and document requirements; Display academic progress history.), Award (View account summary; Review awards; Accept award offers; Display award payment schedule; View loan applications; Review withdrawal information.), E-Mail University Financial Aid Office, General Financial Aid (Financial Aid Application and Information Links), and Authorizations (Authorize financial aid to pay other charges). A 'RELEASE: 8.14.1' notice is at the bottom.

The **AUTHORIZE** page should be displayed. All authorizations that have been defined on TVVAUTH, GTVSDAX, and Web Tailor will appear for all students, regardless of their financial aid awards.

Any changes made to the **INFORMATION TEXT** label **FA_HEAD** for procedure ztgkauth.zp_authorize will be reflected on the heading of this page.

The **VERIFY** and **CONFIRM** pages are the same as when a student logs in and is prompted for authorization.

Title IV Online Authorization is successfully implemented.



IV. Verification of Authorizations

Overview

Authorizations made by the student will place an Authorization Code on the Authorization Form (TVAAUTH). This Authorization Code will prevent the refunding of Title IV Financial Aid using the Auto Refunding of Credit Amounts Process (TSRRFND). The authorized balance will need to be processed based on the institutionally defined business practice. The authorization should then be rescinded for refunding of an outstanding credit balance to occur.

When authorizations are made by the student via Self-Service, the money is earmarked to pay any outstanding charges the student owes on his or her account.

Important



Unless the authorization is rescinded, the hold will continuously be on the student's account.

Authorization Maintenance Form

Once students have Authorized their Title IV money, a hold is created on the TVAAUTH form. See the following example.

Authorization Code	Start Date	End Date	Status	User ID	Activity Date
HLD	26-OCT-2009	31-DEC-2009	Authorized	DAD_USER	26-OCT-2009
PY	26-OCT-2009	31-DEC-2009	Authorized	DAD_USER	26-OCT-2009
TIV	26-OCT-2009	31-DEC-2009	Authorized	DAD_USER	26-OCT-2009
HB	26-OCT-2009	31-DEC-2009	Authorized	JYOUNG	26-OCT-2009

If authorizations are to be rescinded, it is strongly recommended to utilize your institution's standard business practice to perform this task.

Appendix A: Document History

This section details the history of the document and updates made for each modification.

Release and Date	Form/Process	Page	Update Description
Georgia Enhancements 7.9, September 15, 2007	NA	NA	Split from the HOPE user documentation
Georgia Enhancements 7.21, September 30, 2009	NA	Pg 15 and various screenshots updated to show correct version #'s	Added note regarding Race & Ethnicity Survey on pg15.
Georgia Enhancements 8.0, March 31, 2010	NA	NA	Updated screen shots & functionality for v8 release. Added Process Flow as Appendix B.
Georgia Enhancements 8.9.1, August 5, 2011	NA	multiple	Deleted references to HOPE Scholarship, since HOPE Scholarship no longer pays for Books.
Modifications to Banner Baseline WebTailor 8.5 May 31, 2012	N/A	Multiple	Updated screenshots

Appendix B: Process Flow

