User Documentation for the Financial Aid Reporting System (FARS)

For Banner and Non-Banner Institutions

Georgia Enhanced Banner Financial Aid Systems

Versions 8.9.3

Information Technology Services, ITS

October 2011

This page left blank to facilitate front/back printing.

Table of Contents For Banner and Non-Banner Institutions 1
Georgia Enhanced Banner Financial Aid Systems 1
Versions 8.9.3 1
Introduction to the Financial Aid Reporting System 1
Purpose of FARS 1
FISAP process Relationship to Georgia Enhancements 1
Implementation deadline 2
Target audience 2
Using this document 2
Support 2
Additional Resources 3
Specifications for FARS 3
Minimum browser requirements 3
Overview of Steps in FARS Data Submission 4
Steps for non-Banner institutions 4
Steps for Banner institutions 4
Illustration 4
Create Data Files and FTP to USG Data 6
Non-Banner Institutions create data file and FTP 6
Banner institutions create data file and FTP 6
Log in to FARS 8
Access portal 8
Log in 9
Access FARS 10
Validate Data 11
Validate data 11
Correct Data Using Student Info Search 13
View student records 13
Obtain extraction report 14
Print report 14
Correct errors 16
FTP corrected file 16
Repeat process 16
Verify Summary Report 16
Verify summary report 16
Print report 16
Submit Data 17
Submit data 17

Complete process successfully ***17***
View your Summary Report after Submitting **18**
View Summary Report ***18***
Requesting Support **19**

This page left blank to facilitate front/back printing.

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.

FISAP process Relationship to Georgia Enhancements

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

at: http://www.usg.edu/georgia_best/banner/ga_enhancements/

Documentation is also available on ftp.usg.edu at:

banner/prod/gamod/8/89/893

RELEASE LOCATION: This release and accompanying documentation are available on ftp.usg.edu in the following directory:

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.**

Enable JavaScript

Follow these steps to enable JavaScript in Internet Explorer:

1. From the browser menu, select **Tools**.
2. Select **Internet Options**.
3. Select the **Security** tab.
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:

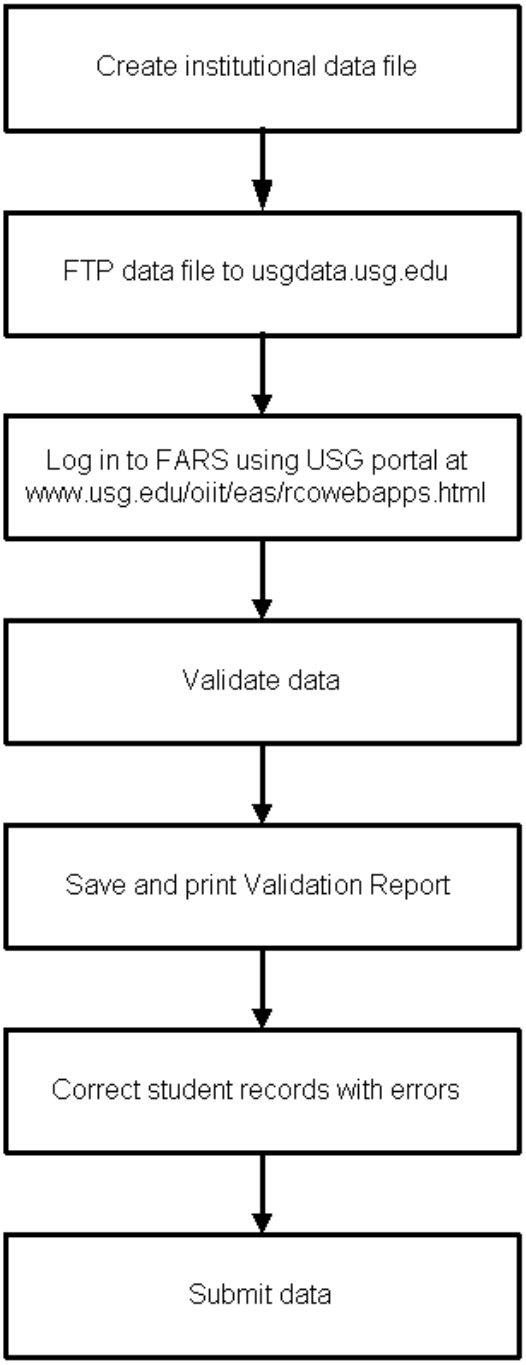
   http://www.usg.edu/information_technology_services/webapps/
5. Validate data.
6. Save and print Validation Report.
7. Search for student errors and correct them in Banner.
8. Submit data.

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



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.

Non-Banner Institutions create data file and FTP

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.

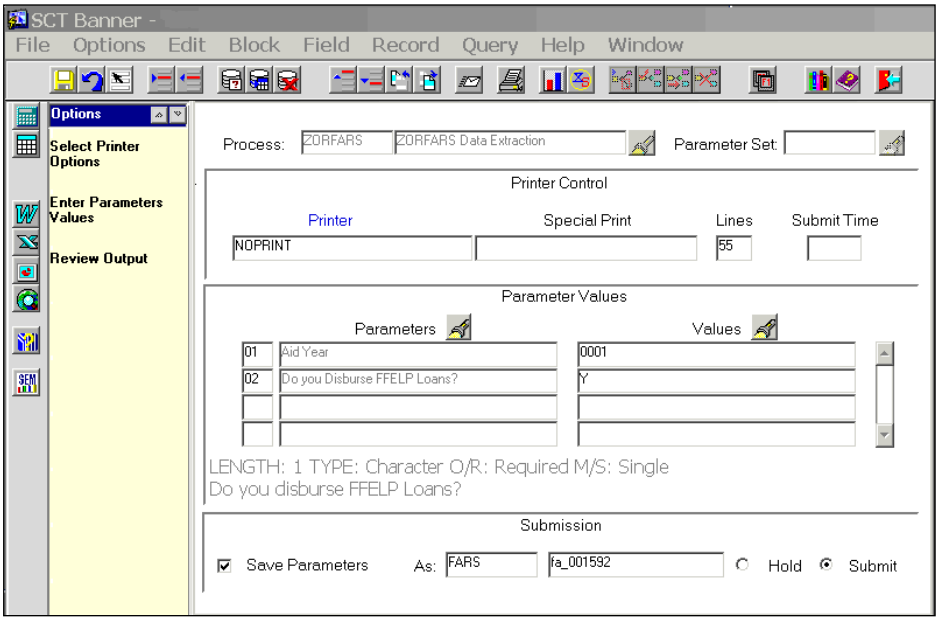
   Note: The only time that you use the 's' is when you FTP the file.

   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



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:

Parameter		Value
01	Aid Year	Example: 0001
02	Do you disburse FFELP Loans?	Y for Yes or N for No

   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.

FTP data file

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.

Additional Information

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:

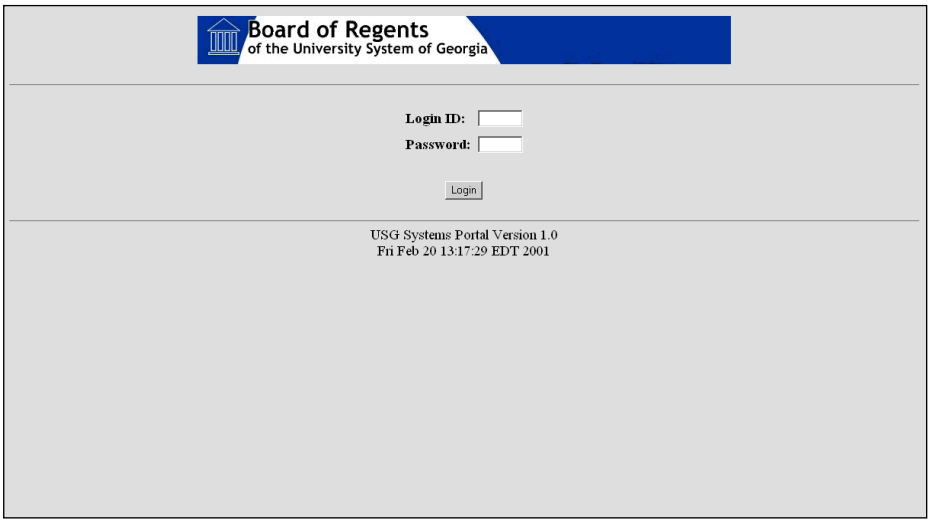
http://www.usg.edu/information_technology_services/webapps/

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.

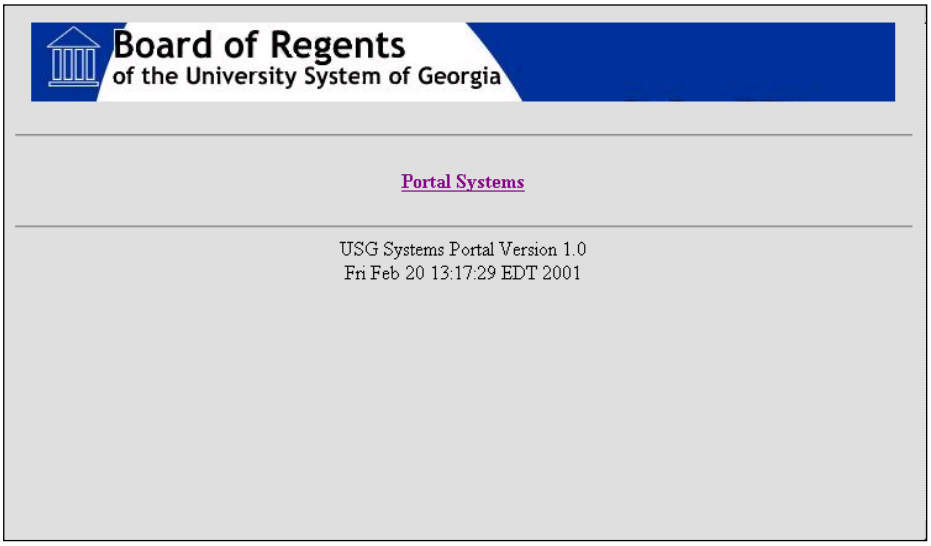
Click **Yes** to close the window.

Log in

Log in to the portal using your FICE code (without the 's') as your user ID and your FTP password.

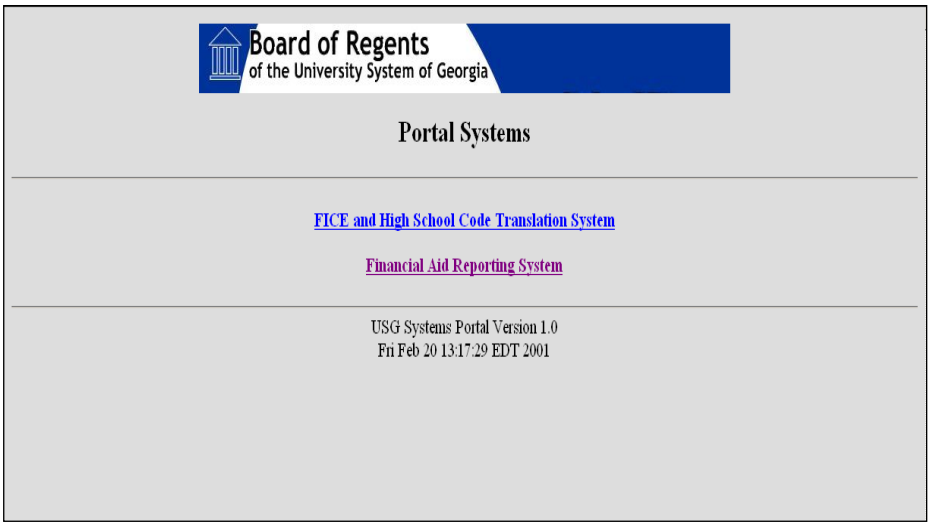


Click **Portal Systems**.



Access FARS

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



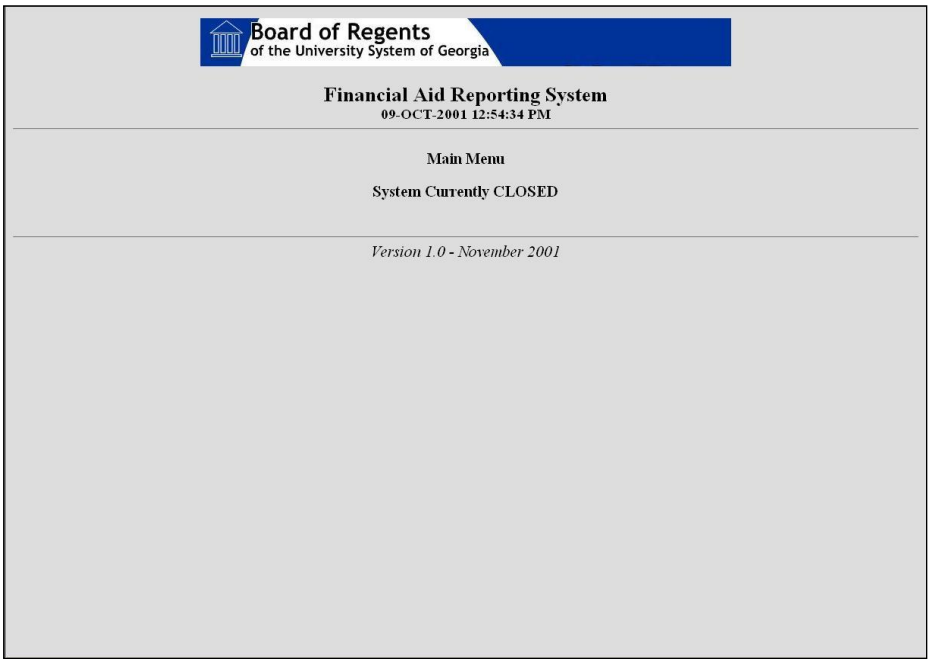
Printing

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.

System closed

However, if the administrator has not opened the system and you try to log in, you will see the following screen:



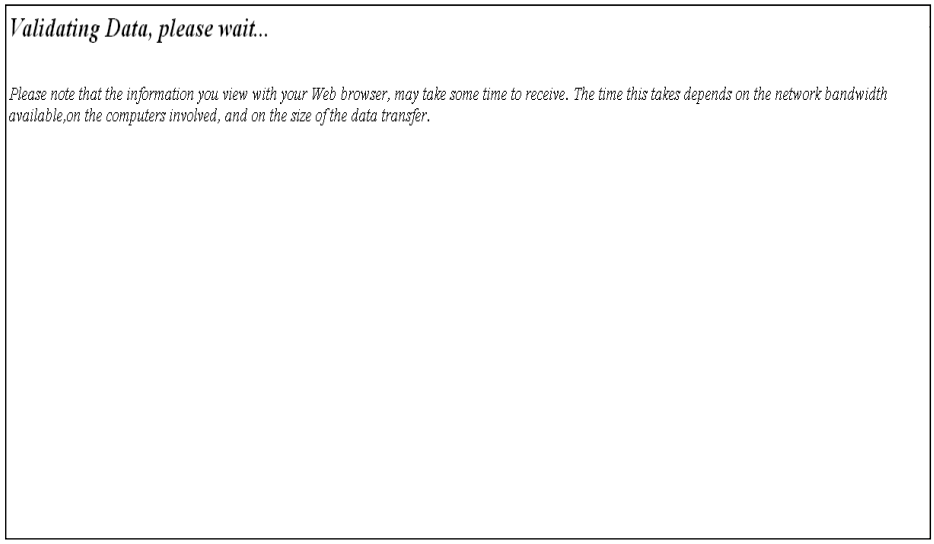
Validate Data

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

Validate data

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

A **Validating Data, please wait…** screen will appear.



Save and print edit report

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

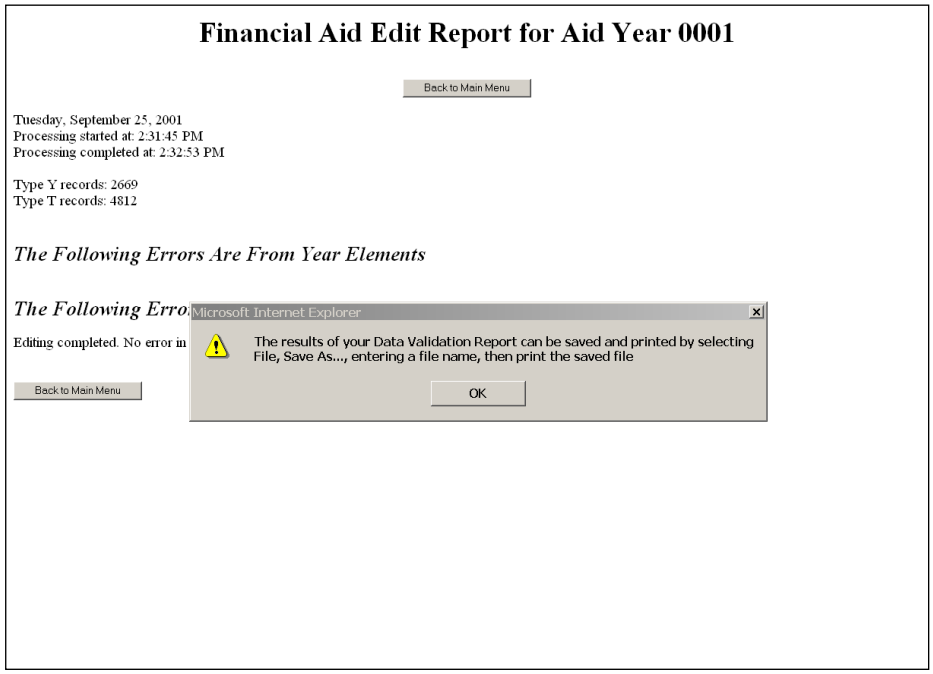
To obtain a listing of students IDs, print this report.

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

Correct errors

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.



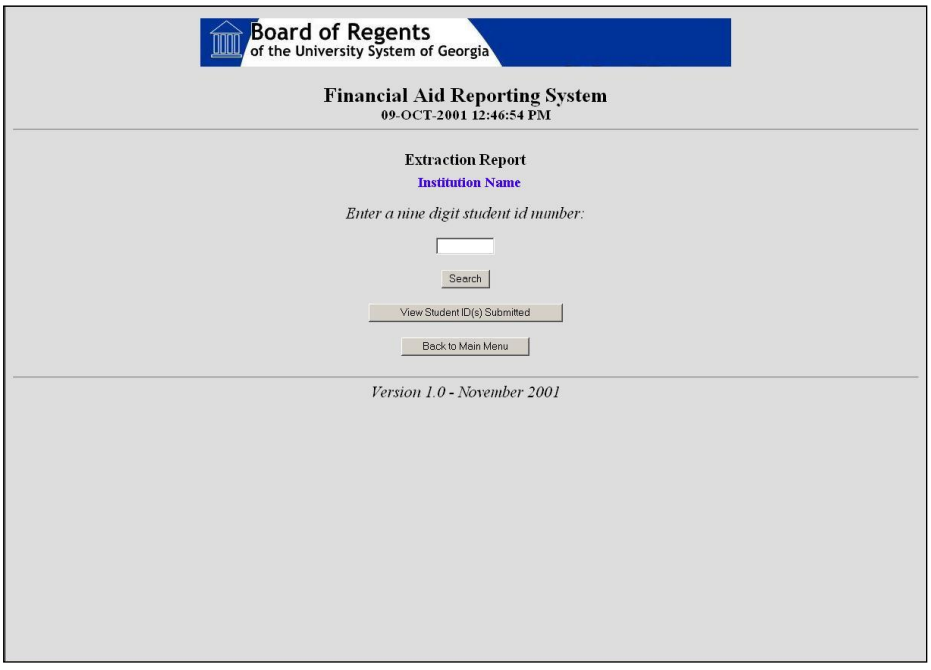
Correct Data Using Student Info Search

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.

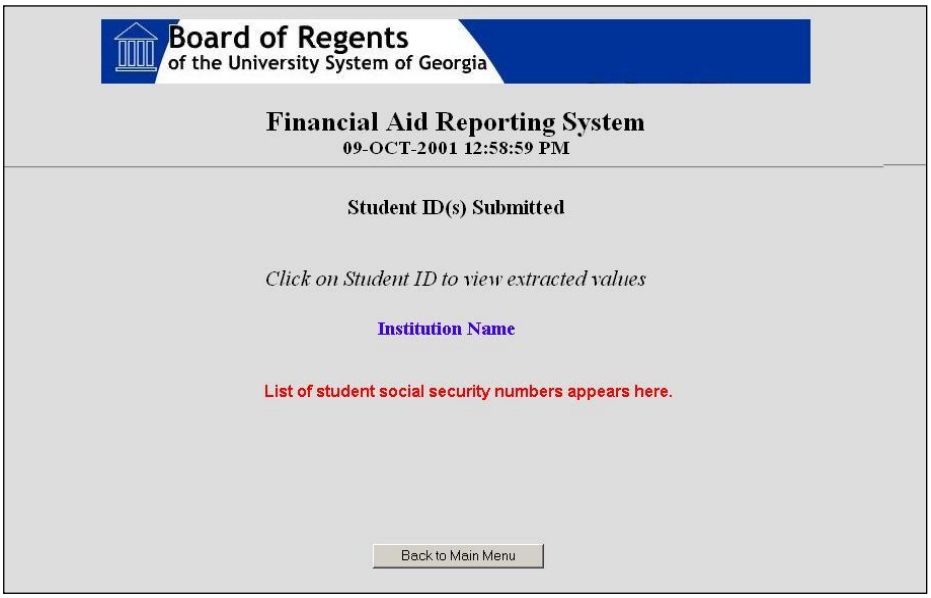
View student records

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.

Board of Regents
of the University System of Georgia

Financial Aid Reporting System
05-OCT-2001 10:28:34 AM

Extraction Report

EXTRACTED TERM VALUES FOR			
ELEMENT TITLE	**ELEMENT NUMBER**	**VALUES BY TERM**	
FICE Institution Code	F100	001569	001569
Student ID Number			
Award Year	F130	0001	0001
Academic Term	F140	20014	20014
Student Level Indicator	F150	US	US
FDL Subsidized Loans	F210	03065	03065
FDL Unsubsidized Loans	F215	01640	01640
FFELP Subsidized Loans	F220		
FFELP Unsubsidized Loans	F225		
Perkins Loans	F230		
FDL PLUS Loans	F240		
FFELP PLUS Loans	F245		
Other Federal Loans - Disbursed	F250		
Other Federal Loans - Non-disbursed	F255		
Institutional Loans - Disbursed	F260		
Institutional Loans - Non-disbursed	F265		
External Loans - Disbursed	F270		
External Loans - Non-disbursed	F275		
State Loans - Disbursed	F280		
State Loans - Non-disbursed	F285		
Federal Work Study Awarded	F300		
State Work Study Awarded	F310		
Pell Grant	F400		
SEOG	F410		
Other Federal Need-Based Grants - Disbursed	F420		
Other Federal Need-Based Grants - Non-disbursed	F425		
Other Federal Non-Need Based Grants - Disbursed	F430		
Other Federal Non-Need Based Grants - Non-disbursed	F435		
HOPE Scholarship	F500		
HOPE Grants - Certificate/Diploma	F510		
HOPE Grants - GED	F520		
HOPE Teacher Scholarship	F530		
PROMISE Teacher Scholarship	F540		
PROMISE II Teacher Scholarship	F550		
Other State Non-Need Based Grants - Disbursed	F560		
Other State Non-Need Based Grants - Non-disbursed	F565		
Other State Need Based Grants - Disbursed	F570		
Other State Need-Based Grants - Non-disbursed	F575		
Institutional Need Based Grants - Disbursed	F600		
Institutional Need-Based Grants - Non-disbursed	F605		
Institutional Non-Need Based Grants - Disbursed	F610		
Institutional Non-Need Based Grants - Non-disbursed	F615		
External Need-Based Grants - Disbursed	F700		
External Need-Based Grants - Non-disbursed	F705		
External Non-Need Based Grants - Disbursed	F710		
External Non-Need Based Grants - Non-disbursed	F715		
Athletic Scholarships - Disbursed	F800		
Athletic Scholarships - Non-disbursed	F805		

EXTRACTED VALUES FOR FOR FISCAL YEAR 0001		
ELEMENT TITLE	**ELEMENT NUMBER**	**VALUES**
FICE Institution Code	F100	001569
Student ID Number		
Award Year	F130	0001
Financial Dependency Status	F160	1
Student Financial Need	F170	0000003359
Expected Family Contribution	F180	03041
Aggregate Subsidized Outstanding Loans	F200	004125
Aggregate Unsubsidized Outstanding Loans	F205	

Back to Main Menu

Version 1.0 - November 2001

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

Institution Name

Award Year 2000 - 2001

Fund Type	Fund Source	Fund Name	Fund Total - Undergraduate	Fund Total - Graduate	Fund Total - Professional	Fund Total - Other
Loans	Federal	FDL Sub. Loans	3,607,333	1,042,258	0	0
Loans	Federal	FDL Unsub. Loans	2,574,009	456,729	0	0
Loans	Federal	FFELP PLUS Loans	263,213	0	0	0
Loans	Federal	Perkins Loans	392,860	41,975	0	0
Need-Based Grant	Federal	Pell Grant	1,826,542	0	0	0
Need-Based Grant	Federal	SEOG	99,619	0	0	0
Non-Need Based Grant	Athletic	Athl. Schol.-Disb	150,205	10,918	0	0
Non-Need Based Grant	External	Ext Non-Need Grant-Disb	9,000	0	0	0
Non-Need Based Grant	External	Ext Non-Need Grnt-NonDisb	3,000	0	0	0
Non-Need Based Grant	Institutional	Inst Non-Need Grants-Disb	34,390	0	0	0
Non-Need Based Grant	State	HOPE Scholarship	2,307,118	0	0	0
Non-Need Based Grant	State	HOPE Teacher	0	115,000	0	0
Non-Need Based Grant	State	PROMISE II Teacher	4,470	0	0	0
Non-Need Based Grant	State	PROMISE Teacher	88,500	0	0	0
Work-Study	Federal	Federal Work Study	123,524	0	0	0
	TOTALS		11,483,783	1,666,880	0	0

Print report

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

Submit Data

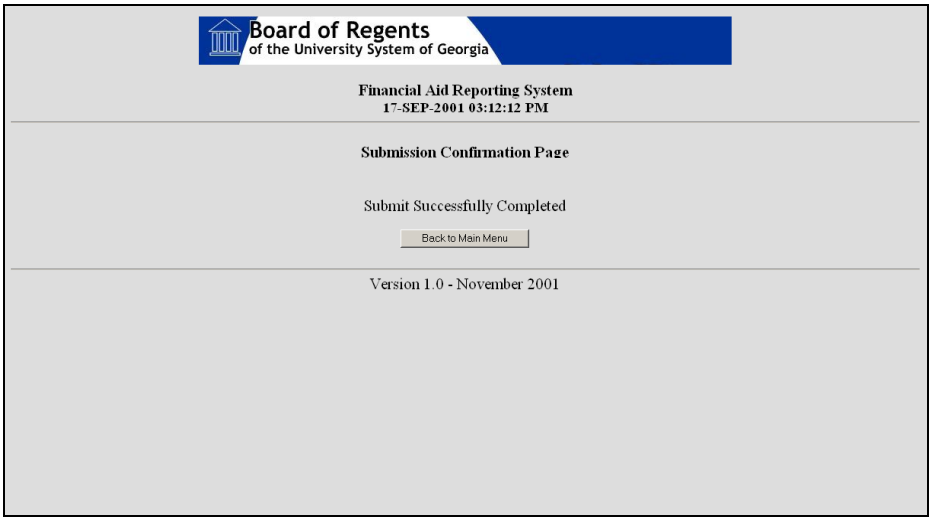
Submit data

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.

Complete process successfully

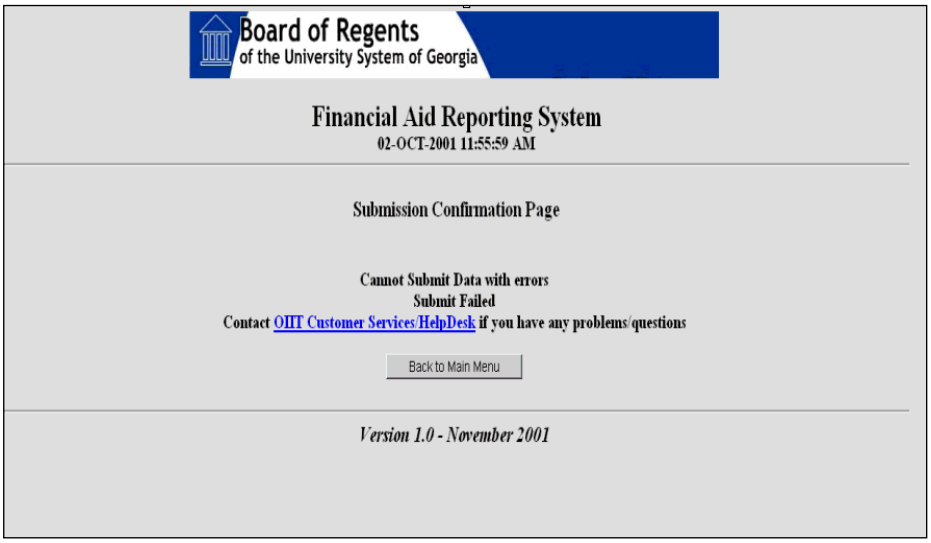
A **Submit Successfully Completed** screen indicates that you are finished with the data collection process.



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

Receive error message

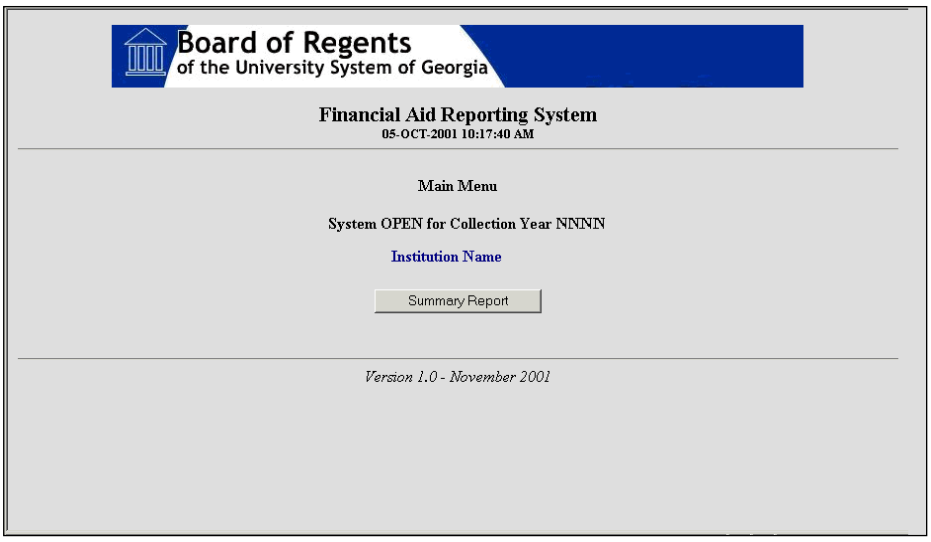
A **Cannot Submit Data with errors** screen indicates that you have errors in the data. Correct the data in your student information system, ftp the file, and re-run the **Validate Data** process. Follow the previous steps on the **Validate Data** process.



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.