Oracle's PeopleSoft 9.0 Financial Aid Updates and Changes for CS Bundle #47 Regulatory Release 2 2018-2019

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CS Updates and Changes for Bundle #47, Regulatory Release 2 2018-2019

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Updates for CS 9.0 Bundle #47, Regulatory Release 2 2018-2019

Note. This PDF package is an update to the PeopleSoft Financial Aid 9.2 PeopleBook and other related Campus Solutions PeopleBooks as noted. It describes CS 9.0 Patch ID #25497275/ Product Update ID #936125 that was posted to My Oracle Support in October 2017. Use this PDF package in conjunction with your PeopleBook to maintain a complete set of documentation.

Documentation about bundle changes is incorporated into the relevant 9.2 PeopleBook chapters.

PDFs of the updated 9.2 chapters that contain the 9.0 bundle changes are attached.

Use this Overview document to view a list of the bundle changes and updated chapters.

Using PDF Package (PDF Portfolio) Documentation

These instructions are for Adobe Reader DC with the latest updates installed (In Adobe Reader, click Help, Check for Updates).

To view the list of chapters, click View > Portfolio > Details.

To search for documentation about the changes within a particular chapter, open the chapter and press CTRL + F. Enter “bundle xx” where xx is the bundle number and click Next.

To search the entire package for documentation updates, click Edit > Search Entire Portfolio.

Note! Cross references in PDF chapters appear as follows:

- If a cross reference is to a topic in the same book (for example, Campus Community topic A contains a cross reference to Campus Community topic B), the cross reference displays only the topic title.
- If a cross reference is to a topic in a different book, the cross reference displays the topic title and the book name.
- Some cross references appear as links but are actually text-only.

Here is a list of the Bundle 47 changes and the chapters that contain documentation about those changes. Chapters are in the *PeopleSoft Financial Aid 9.2 PeopleBook* unless noted otherwise:

- Added options to calculate international student and non-custodial parent contributions.
    - Processing INAS.pdf
    - Processing and Using Institutional Financial Aid Applications.pdf
- Added new Verification fields to support institutional application non-custodial parent data, updated “Father” and “Mother” fields to “Parent 1” and “Parent 2” respectively, and added IRS Data Retrieval Tool fields.
    - Assessing Eligibility for Financial Aid.pdf
- Added IRS Data Retrieval Tool fields.
    - Processing Federal Financial Aid Applications.pdf

Updates Not Called Out in Documentation

ISIR Updates for 2018-2019

NOTE! These updates are based on the Final 2018–2019 EDE Technical Reference (published 7/10/2017), 2018-2019 SAR Comment Codes and Text Guide (published 7/25/2017, and the Federal School Code List (published 8/1/17).

- Import Federal Data Files (Financial Aid > File Management > Import Federal Data Files) and Process ISIRs (Financial Aid > File Management > ISIR Import > Process ISIRs)
    - Updated the inbound programs to inbound and load 2018-2019 ISIR files.
- 2018-2019 Suspense Management (Financial Aid > File Management > ISIR Import > 2018-2019 Suspense Management), 2018-2019 ISIR File Data (Financial Aid > File Management > ISIR Import > 2018-2019 ISIR File Data), and Correct 2018-2019 ISIR Records (Financial Aid > Federal Application Data > Correct 2018-2019 ISIR records)
    - Delivered new ISIR Suspense Management and ISIR Correction Management components to manage 2018-2019 ISIRs.
- Process ISIR Corrections (Financial Aid > File Management > ISIR Corrections > Process ISIR Corrections) and Create Federal Data Files (Financial Aid > File Management > Create Federal Data Files)
    - Updated the outbound programs to create ISIR correction files for 2018-2019.
- ISIR/SAR Cross Reference (Set Up SACR > Product Related > Financial Aid > Application Processing > ISIR/SAR Cross Reference)
    - Updated the ISIR/SAR Cross Reference for Aid Year 2019.
- Maintain ISIR Comment Codes (Set Up SACR > Product Related > Financial Aid > Application Processing > Maintain ISIR Comment Codes)
    - Updated the ISIR Reject Reasons & Comment Codes for Aid Year 2019.
- School Code Table (Set Up SACR > Product Related > Financial Aid > Aid Year > School Code Table)
    - Updated the School Codes Table for Aid Year 2019.

NSLDS Updates for 2018-2019

NOTE! These updates are based on the NSLDS Transfer Student Monitoring/Financial Aid History User Guide and Batch File Layouts (published 8/10/2017).

- Summary of changes to the NSLDS TSM/FAH layouts for 2018-2019
    - New Interest Rate fields added to the Loan Detail Record

- Import Federal Data Files (Financial Aid > File Management > Import Federal Data Files)
    - Updated the inbound programs to inbound and load 2018–2019 NSLDS files.

- View NSLDS Loan Data (Financial Aid > Awards > View NSLDS Loan Data)
    - Updated the page to display new fields.

INAS Federal Methodology (FM)/Estimated Federal Methodology (EFM) Updates for 2018-2019

NOTE! This delivery of FM/EFM INAS contains updated computational support for the 2018-2019 INAS Federal Methodology (FM) and Estimated Federal Methodology (EFM). Modifications were made to account for processing logic to support 2018-2019.

- INAS 2018-2019 Global Options (Set Up SACR > Product Related > Financial Aid > Application Processing > INAS 2018-2019 Global Options)

    - INAS Data Source: Ability to select Federal or Both F/I (Federal/Institutional).
    - INAS Calc Type: Ability to select FM (Federal Methodology) or FM & IM (Federal Methodology and Institutional Methodology).

- INAS Assumption Codes (Set Up SACR > Product Related > Financial Aid > Application Processing > INAS Assumption Codes)

    - 2018-2019 INAS FM Assumption Codes with updated year references

- View 2018-2019 IM EFC Detail (Financial Aid > Federal Application Data > View 2018-2019 FM EFC Detail)

    - Logic to populate detail and assumptions.

- Simulate 2018-2019 FM INAS (Financial Aid > Federal Application Data > Simulate 2018-2019 FM INAS)

    - Updated year references.
    - Pre-populate Simulation pages with the most current ISIR data.
    - Update data and perform INAS.
    - Update ISIR application with simulated data.
    - Write data changes to ISIR audit.

INAS Institutional Methodology (IM) Updates for 2018-2019

NOTE! These updates are based on final specifications as provided by the College Board. The update of IM INAS contains updated computational support for the 2018-2019 INAS Institutional Methodology (IM) processing logic to support 2018-2019.

- INAS 2018-2019 Global Options (Set Up SACR > Product Related > Financial Aid > Application Processing > INAS 2018-2019 Global Options)
    - INAS Data Source : Ability to select Institutional or Both F/I (Federal/Institutional).
    - INAS Calc Type: Ability to select IM (Institutional Methodology) or FM & IM (Federal Methodology and Institutional Methodology).
- INAS Assumption Codes (Set Up SACR > Product Related > Financial Aid > Application Processing > INAS Assumption Codes)
    - View 2018-2019 IM EFC Detail (Financial Aid > Institutional Application Data > View 2018-2019 IM EFC Detail)
    - Logic to populate detail and assumptions.
    - 2018-2019 INAS IM Assumption Codes with updated year references.
- View 2018-2019 IM EFC Detail (Financial Aid > Institutional Application Data > View 2017-2018 IM EFC Detail)
    - Logic to populate detail and assumptions.
    - 2018-2019 INAS IM Assumption Codes with updated year references.
- View Correction Audits (Financial Aid > Institutional Application Data > View Correction Audits)
    - Write data changes to institutional audit.

Federal and Institutional Verification Updates for 2018-2019

- Updated the system for 2018-2019 Verification processing allowing tax data entry, consolidation, compare and update to ISIR or Institutional applications.
- Ability to write data changes to ISIR or Institutional audit.