



Oracle's PeopleSoft 9.0 Financial Aid Updates and Changes for CS Bundle #43 Regulatory Release 2 2017-2018

October 2016



CS Updates and Changes for Bundle #43, Regulatory Release 2 2017-2018

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Updates for CS 9.0 Bundle #43, Regulatory Release 2 2017-2018

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 #24291435/ Product Update ID #931964 that was posted to My Oracle Support in October 2016. 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 43 changes and the chapters that contain documentation about those changes. Chapters are in the *PeopleSoft Financial Aid 9.2 PeopleBook* unless noted otherwise:

- Updated Direct Loan processing to support for SULA Correcting Edit 219.PROFILE for 2017-2018 Aid Year.
 - Processing Direct Loans.pdf

Updates Not Called Out in Documentation

With the introduction of the Early FAFSA and using Prior-Prior Year tax information, students are able to file for Federal Aid a full three months earlier than before, starting on October 1, 2016 for the 2017-2018 Aid Year. Therefore, the United States Department of Education (DOE) and the College Board now provide updated technical guides earlier and updates to the ISIR, INAS, and

Verification features of Campus Solutions Financial Aid can be delivered in advance of the October 1 startup date. These updates were previously released with Critical Patch ID 11262397.

There were no updates to PeopleBooks related to this update.

ISIR Updates for 2017-2018

NOTE! These updates are based on the Final 2017–2018 EDE Technical Reference (published 7/25/16), 2017-2018 SAR Comment Codes and Text Guide (published 8/10/16), and the Federal School Code List (published 8/1/16).

- 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 2017–2018 ISIR files.
- 2017-2018 Suspense Management (Financial Aid > File Management > ISIR Import > 2017-2018 Suspense Management), 2017-2018 ISIR File Data (Financial Aid > File Management > ISIR Import > 2017-2018 ISIR File Data), and Correct 2017-2018 ISIR Records (Financial Aid > Federal Application Data > Correct 2017-2018 ISIR records)
 - Delivered new ISIR Suspense Management and ISIR Correction Management components to manage 2017–2018 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 2017-2018.
- 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 2018.
- 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 2018.
- School Code Table (Set Up SACR > Product Related > Financial Aid > Aid Year > School Code Table)
 - Updated the School Codes Table for Aid Year 2018.

INAS Federal Methodology (FM)/Estimated Federal Methodology (EFM) Updates for 2017-2018

NOTE! This delivery of FM/EFM INAS contains updated computational support for the 2017-2018 INAS Federal Methodology (FM) and Estimated Federal Methodology (EFM). Modifications were made to account for processing logic to support 2017-2018.

NOTE! The updated INAS module includes support for both FM and IM INAS. FM INAS incorporates all of the federal specifications that DOE has published to date but has not been tested with DOE-provided ISIR test files. The DOE plans to make the ISIR test files available in October 2016. At that time, the College Board will perform comprehensive testing and provide any necessary updates through a Technical Update as they have in the past.

- INAS 2017-2018 Global Options (Set Up SACR > Product Related > Financial Aid > Application Processing > INAS 2017-2018 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)
 - 2017-2018 INAS FM Assumption Codes with updated year references
- View 2017-2018 FM EFC Detail (Financial Aid > Federal Application Data > View 2017-2018 FM EFC Detail)
 - Logic to populate detail and assumptions.
- View ISIR Field Audits (Financial Aid > Federal Application Data > View ISIR Field Audits)
 - Write data changes to ISIR audit.
- Simulate 2017-2018 FM INAS (Financial Aid > Federal Application Data > Simulate 2017-2018 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 2017-2018

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 2017-2018 INAS Institutional Methodology (IM) processing logic to support 2017-2018.

- INAS 2017-2018 Global Options (Set Up SACR > Product Related > Financial Aid > Application Processing > INAS 2017-2018 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 2017-2018 IM EFC Detail (Financial Aid > Institutional Application Data > View 2017-2018 IM EFC Detail)
 - Logic to populate detail and assumptions.
 - 2017-2018 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 2017-2018

- Updated the system for 2017-2018 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.