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Overview of Workbench

Workbench is a client/server presentation of the tables that are used to work in conjunction or as a foundation with the ProSAM database and supporting programs developed and supported by Sigma Systems, Inc. Each individual Table is described further in this document.

Workbench offers Windows style screens to support all of the functions of Sigma’s financial aid software.

Security

ProSAM Workbench, (system PWB), enjoys comparable security features to those of the ProSAM product. This enables individual users to have:

- No access, to a function or module;
- Query access or Read-Only to a function restricting the individual user to look at the information displayed on the screen;
- BIO specific: Add / No update
- Update Access and query access providing the ability to see and update information on an existing record in the database;
- Add update and query access, which permits the individual to add new records to the database module (except BIO records) as well as update and query records that already exist;
- Delete, add, update, and query access
- Executive Access, permits the individual all of the above with the addition of special override ability in some applications such as packaging.

Refer to the LockSmith and ASYU manuals for more thorough discussions of the Security capabilities and setup of the Sigma Financial Aid software.

The following table is similar to Appendix B of the ASYU Manual. It identifies the two character abbreviation for each Table within the Workbench (PWB) application.
Workbench Navigation Bar

The Navigation and toolbars in Workbench are much like ProSAM.

Open Table Icon

The Open Icon allows the user to choose the specific table to open for display or modification by entering the 3 character code for that table in the pop up window i.e AAA. Once the OK button is pressed the requested table will be displayed. If the Icon was pressed in error select the cancel button.
Change Aid Year Icon

Upon opening Workbench, the Aid Year will automatically default to the Aid Year that is in the Global Defaults table. If the user wishes to work in a different year, selecting this Icon will popup a box to change to a different Aid Year. Enter the preferred Aid Year and select the OK button.
Save Icon

This Icon is used every time a modification is made to a table, when the user’s Save preferences set in Tools/Options has been set to Explicit Save, and the user wants those modifications added to the database. When the user’s preferences have been set to AutoSave the data is saved to the database when navigating to a different table or aidyr.

![The Workbench Navigation Bar, Save Icon](image)

Cancel Icon

This Icon is used when modifications have been made to a screen and the user does not want the modifications to be added to the database. NOTE: this icon is not applicable for all of the tables, when it is applicable the display will be red rather than grayed out as in the example below.

After selecting the cancel icon the record will be refreshed to the original state prior to any modifications.

![The Workbench Navigation Bar, Cancel Icon](image)
New Icon

The New Icon is used when accessing a table and a new entry is needed, like when adding a document to the documents table.

![The Workbench Navigation Bar, New Icon](image1)

Delete Icon

The Delete Icon is used when a particular item is no longer desired to be in a particular table. For example: a document in the documents table is no longer used and therefore can be removed from the table.

![The Workbench Navigation Bar, Delete Icon](image2)
Question Mark "About" Icon

This Icon displays version information regarding the Workbench client that is currently installed on the PC. Occasionally, it may be necessary to check the version of specific DLL's, which comprise the Workbench software to assist with trouble shooting problems.
Special Purpose Toolbar Icons

In addition to the aforementioned toolbar icons, there are two special icons Sigma has placed on the Toolbar to activate Workbench functions. These are Unload Data and Load Data. These icons are not available at this time however, are intended to allow the user(s) to easily Unload, Load, and Reload the tables in a batch process, much like the Special Toolbar Icons in ProSAM which utilizes the OPT table.

The Workbench Navigation Bar, Unload Data Icon

The Workbench Navigation Bar, Load Data Icon
AAA – Global Default Update Table

The Global Default Table allows the user to set up system-wide defaults and is NOT Aidyr specific. Some Control Options are required for every program, and this table gives the user the ability to define them only once. The first field is Aid Year, which is the aid year the ProSAM and Workbench systems will default for processing upon entry, usually the current aid year. The date the system uses during processing is entered in Process Date (PDATE) typically this date is left blank so that the system date will be used. Print Lines (PLINES) contains the number of lines printed per page on reports. Institution Code and Institution Identifier are no longer required. The Comment field will be printed as a note on reports generally the Institutions name might be used. NOTE: This table MUST be defined each year in order for some of the ProSAM screens to display correctly.
AAB – SNx Default Table

The SNx Defaults Table provides default values for the processing options used by the Need Analysis Computation program SAML30, and the FAR Print and Data Transfer program SAML40. NOTE: This table MUST be defined each year in order for some of the ProSAM screens to display correctly.

There is only one AAB table for each processing year. When a record does not exist for a year, a pop-up box appears indicating that the record does not exist and asks if you would like to add one. When answered yes, all of the elements will be blanked out ready for data entry. After the appropriate values are updated, select the save icon to retain the desired values.
OPTIONS FOR SAML30 (left side)

**Fiscal Year** (*FISCYR*) 2 character value that defines the Fiscal Year for processing a value of 10 would be for the 2009-2010 processing year.

**MDE Type** (*MDETYPE*) defines what MDE processor the data is coming from and controls whether certain intermediate values are truncated or rounded.

**Computation** (*COMPUTE*) determines how the records should be computed. The Federal Computation, Congressional Methodology Computation or all methods available.

**Processing** (*PROCESS*) defines which students will be processed, depending on what the student's Computation Status Flag is set to.

**Type Term** (*TYPETRM*) is used in conjunction with the NINEMTH option. The value for this option must match the Type of Term in the MAP Records in the Schedule Table section of the Table File.

**Other Than Nine Month Calculation** (*NINEMTH*) determines whether the computations are performed for a period other than nine months for all students processed by SAML30.

**Dependency Determination** (*DEPEND*) allows the dependency status to be determined or re-determined by SAML30.

**Financial Analysis Report** (*FAROPT*) determines whether a Financial Aid Report is requested for the student.

**Input Key File** (*KEYOP*) determines whether an input Key File is read by the program.

**Independent** (*INDPC*) calculates an independent student parental contribution using the regular formula for the PC for a dependent student.

**Tolerance Amount** (*TOLER*) is used in conjunction with the FAROPT option (discussed later). This option is set to a numeric value, which defines a dollar amount of change in the EFC that will cause a FAR to be requested.
 OPTIONS FOR SAML40 (right side)

**Fiscal Year (FISCYR)** 2 character value that defines the Fiscal Year for processing a value of 10 would be for the 2009-2010 processing year.

**FAR Format (FORMAT)** determines the format of the FAR Reports, either a detailed report or selected key information.

**Input Key File (KEYOP)** determines whether an input Key File is read by the program, just as in SAML30.

**Report Detail (REPORT)** determines whether to print the report in detail or not.

**FAR Print (FARPRNT)** determines whether a FAR is printed.

**Update SAM File (SAMFILE)** determines if the program updates the SAM File, prints FARs or both.

**Estimated Family Contribution (EFCOPT)** determines which parent, student and total family contribution values are transferred from the Need Analysis SNB File to the SAM File.

**Update Official Pell Index (UPOPGI)** determines how the program updates the Official Pell Grant Index and additional fields on the SAM Record.

**SAR Processing (SARPROC)** determines how the program updates the Estimated Pell Grant Index.
Note: Some Control Options work in conjunction with each other, for instance:

**SAMFILE, FARPRNT, FORMAT**

If SAMFILE is set to *B*, which means to both update SAM File and produce FARs, then values for FARPRNT and FORMAT should be entered to control which FARs are printed, and in what format. If SAMFILE is *O*, (to only update SAM File), FARPRNT and FORMAT options are ignored by the program.

**EFCOPT, SARPROC, UPOPGI, SAMFILE**

If SAMFILE is set to update the SAM File (either *B* or *O*), then values for EFCOPT and SARPROC may be set. EFCOPT, SARPROC, and UPOPGI options are only accessed by the program when the SAM File is to be updated. EFCOPT and SARPROC options should be set in relation to each other. UPOPGI can be set independently.
AAC – FLO Defaults Table (Create Common Record Data)

The FLO Defaults Table provides default values for the processing options used by the Direct Lending, FFELP, Pell Grant, ACG and Smart Grant software, SAMP35x. NOTE: This table MUST be defined each year in order for some of the ProSAM screens to display correctly.

Although this table is Aidyr specific there can be multiple records within that Aidyr (Fiscyr). When multiple records do exist they will be listed on the summary tab showing the unique “processing years” that have been added to the table. For example; different processing years may be necessary if the institution desires to process their undergraduate students (2010UG) differently than their graduate students (2010GR).

When a record does not exist for a year, select the New icon and a blank detail tab is displayed. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to complete additional entries. To leave insert mode, simply select the summary tab.
The (AAC) FLO Defaults Table, Summary Tab
**Common Tab options:** These are options that are applicable to all types of aid.

**Processing Year** *(PROCYR)* is a 4-character field indicating the award aid year the AAC Record uses when performing the V online function on FAPU1/FAPU2. This value must be exactly the same as the value used for the award aid year. No masking is allowed. The default is spaces. Note there are an additional 2 characters that “may” be used to further identify the processing year, however, these 2 characters must be in the 5th and 6th position as the first 4 characters are used by the system for correct processing.
Source for Address Data (ADDR) indicates where the values should be read to update the Borrower's Phone (FLO file, PPHONE), Permanent Address (BSP file Address Type = CP, ADDR1), Permanent Address Line 2 (BSP file Address Type = CP, ADDR2), City (BSP file Address Type = CP, CITY), State (BSP file Address Type = CP, STATE) and Zip (BSP file Address Type = CP, ZIP) in the FLO and BSP files. A value of B (the default) uses the BIO data. A value of L uses the SNB/SNS data. A value of S will obtain a valid address from the BSP file (with the BIO file addresses possible as a last resort) based on the PADDRPRE and LADDRPRE control options.

Source for Date of Birth (DOB) indicates where the value should be read to update the student’s date of birth in the FLO File. A value of B (the default) reads from the BIO File. A value of L reads from the SNB File.

Key Record Output (KEYOUT) controls whether a Key File is produced for each student processed. A value of Y creates a Key File; N (the default) does not.

Source for Student Name and Social Security Number (NAMESSN) indicates where values should be read to update the student's name and SSN in the FLO File. A value of B (the default) reads from the BIO File. A value of L reads from the SNB File.

Rate Option (RATEOPT) controls the source of the rate fee information. A value of P will read the PRD file. A value of O (the default) will use the information provided in the AAC table file and/or SAMP35x batch control options.

Source for Student Citizenship (SCITZN) indicates where the value should be read to update the borrower's citizenship status. A value of B (the default) reads from the BIO File. A value of L reads from the SNB File.
**Local Address Preference** (LADDRPRE) is used when control option ADDR=S and is used to select the permanent address from the BSP File. Up to 15 two character address types may be entered. Each address type is separated by a dash (-). The program will search the BSP file for each address type code until it finds a valid record. If no valid address record is found on the BSP file, the BIO permanent address will be used.

فائدة العنوان المحلي (LADDRPRE) تستخدم عندما يكون الخيار المحدد للعنوان هو S حيث يتم استخدامه لتحديد العنوان الدائم من ملف BSP. يمكن كتابة 15 عنوانًا رقميًا بطول 2 حرفين. كل عنوان هو مقسمًا بواسطة رمز (-). سيتم 반قلة الملف BSP لبحث عن كل عنوان رقمي حتى يجده مقبولاً. إذا لم تجد المفهوم العنوان الدائم على ملف BSP، سيتم استخدام العنوان الدائم الدائم.

Please note: This field is required when ADDR=S.

Please note: If Address Types LO & PE are used, they must be at the end of the list of address types. (i.e. LADDRPER=PH-IS-FA-LO-PE)

**Permanent Address Preference** (PADRPRE) is used when control option ADDR=S and is used to select the permanent address from the BSP File. Up to 15 two character address types may be entered. Each address type is separated by a dash (-). The program will search the BSP file for each address type code until it finds a valid record. If no valid address record is found on the BSP file, the BIO permanent address will be used.

فائدة العنوان الدائم (PADRPRE) تستخدم عندما يكون الخيار المحدد للعنوان هو S حيث يتم استخدامه لتحديد العنوان الدائم الدائم من ملف BSP. يمكن كتابة 15 عنوانًا رقميًا بطول 2 حرفين. كل عنوان هو مقسمًا بواسطة رمز (-). سيتم反قلة الملف BSP لبحث عن كل عنوان رقمي حتى يجده مقبولاً. إذا لم تجد المفهوم العنوان الدائم الدائم على ملف BSP، سيتم استخدام العنوان الدائم الدائم.

Please note: This field is required when ADDR=S.

Please note: If Address Types LO & PE are used, they must be at the end of the list of address types. (i.e. PADRPRE=PH-IS-FA-LO-PE)

**School Code** (SCHCODE) updates part of the LOANID on the FLO Record. The default is spaces.

afiقنة: لإلزام هذا الفئة في حالة ADDR=S.

Please note: The user must enter a value of this field.

**Update Address Data** (ADDRDATA) indicates when to stop updating address data. The address data fields are the phone, permanent address and local address. A value of U (the default) causes update to these original fields. A value of B stops update to these original fields when an Add/Change Loan Record has been exported (F-SAMEXP is A or C). A value of P stops update to these fields when a promissory note has been printed (F-PROMSTAT is P, S or A). A value of S stops update to these fields when a promissory note has been signed and returned (F-PROMSTAT is S or A). A value of T stops update to these fields when the Award Total Paid amount (W-TOTPAID) is greater than zero.

afiقنة: لإزام هذا الفئة في حالة ADDR=S.

afiقنة: إذا تم استخدام أنواع العنوان LO & PE، يجب أن تقع في نهاية قائمة أنواع العنوان. (i.e. LADDRPER=PH-IS-FA-LO-PE)

afiقنة: إذا تم استخدام أنواع العنوان LO & PE، يجب أن تقع في نهاية قائمة أنواع العنوان. (i.e. PADRPRE=PH-IS-FA-LO-PE)

afiقنة: يتم تحديث جزء من LOANID على ملف FLO. المعلمة المعلمة مساحة.

afiقنة: المعمول يدخل قيمة هذا الفئة.

Source for Class (CLASS) indicates where the value should be read to update the student's class level in the FLO File. A value of $S$ (the default) reads from the 6-term-specific Class fields on FASU2. A value of $P$ reads from the Planned Academic Level on FASU1. A value of $L$ reads from the Year in School on FALU1.

Update Eligibility Data (ELIGDATA) indicates when to stop updating eligibility data. Eligibility data fields are: Student's Citizenship Status (PSN.CITIZEN, Person Type = ST for Subsidized/Unsubsidized loans and Person Type = B1 for Plus loans), Dependency Status (F-DEPST), Default Status (F-PDEFAULT for Subsidized/Unsubsidized Loans and F-DEFAULT for Plus Loans), Class Level (F-CLASS), Enrollment Status (F-SENRST), Alien Registration Number (F-PARN for Subsidized/Unsubsidized Loans and F-SARN for Plus loans), Driver's License Number (F-PNUMDL for Subsidized/Unsubsidized Loans) and State (F-PDTL for Subsidized/Unsubsidized Loans). A value of $U$ (the default) causes these original fields to be updated. A value of $B$ stops updating these original fields when an Add/Change Loan Record has been exported (F-SAMEXP is $A$ or $C$). A value of $P$ stops updating these fields when a promissory note has been printed (F-PROMSTAT is $P$, $S$ or $A$). A value of $S$ stops updating these fields when a promissory note has been signed and returned (F-PROMSTAT is $S$ or $A$). A value of $T$ stops updating these fields when the Award Total Paid amount (W-TOTPAID) is greater than zero.

Source for Local Address Line (LADDR) indicates the order in selecting the local address from ASBU1. This option is only used when ADDR is $B$. A value of $1$ (the default) reads the local address line. If spaces, the local address line 2 will be selected instead. A value of $2$ uses the local address line 2 if it exists before it uses the local address line.

Source for Permanent Address Line (PADDR) indicates the order in selecting the permanent address from ASBU1. This option is only used when ADDR is $B$. A value of $1$ (the default) reads the permanent address line. If spaces, the permanent address line 2 will be selected instead. A value of $2$ uses the permanent address line 2 if it exists before it uses the permanent address line.

Report (REPT) controls the type of report produced. Valid values are $D$ for detail, $S$ (the default) for summary, $A$ for all types, $T$ for term, or $B$ for detail with period offered information. This option is only used by SAMP35x.
**Driving File (TFILE)** controls which file is used as the driver file when running SAMP35x. Valid values are **W** to select the AWD File, **F** for the FLO File, **K** or **A** for the Key File (K uses SSN only, A uses SSN and AIDID) or **P** for SAMP10 Transactions. A value of **K** will read a Key File with the records that should be processed. Key File processing is also used when TFILE is **A**. The input key record must also include the AIDID and PTYPE. Only the Award record for that particular AIDID and PTYPE (optional) will be processed.

**Fiscal Year (FISCYR)** provides the 2-digit fiscal year value used to determine which year’s program is to be executed. For example for a processing year of 2007-2008 the Fiscyr would be 08. This value is also used as the processing year in the LOANID when a FLO Record is created. The default is spaces.

**Process Award Types (AWDTYPE)** indicates which types of awards to process. The default is **AL** to process all award types except alternative loans. Valid values are:

- **ST**: Processes typeaid B, C, H, X, Y, 1 and 5 (Direct and FFELP Subsidized and Unsubsidized Stafford loans)
- **PS**: Processes typeaid D, I, Z and 3 (Direct and FFELP PLUS loans)
- **LN**: Processes typeaid B, C, H, D, I, X, Y, 1, Z, 3 and 5 (Direct and FFELP Subsidized, Unsubsidized and PLUS loans)
- **PL**: Processes typeaid E (Pell Grant)
- **AL**: Processes all typeaids B, C, D, H, I, X, Y, Z, 1, 3, 5, E, K, V, 4 and 7 (Direct and FFELP Subsidized, Unsubsidized, PLUS loans, Pell Grant, ACG, SMART and TEACH Grants and Perkins Direct)
- **AT**: Alternative Loans Only (typeaid 2)
- **AC**: Academic Competitiveness Grant (typeaid K)
- **SM**: National Science and Mathematics Access to Retain Talent Grant (typeaid V)
- **TE**: TEACH grant (typeaid 4)
- **AS**: ACG & SMART (typeaids K & V)
- **GR**: Grants (ACG, SMART, TEACH & Pell – typeaids E, K, V & 4)
- **LA**: Loans including Alternative Loans (LN + AT)
- **EV**: Every Award Type including Alternative Loans (AL + AT)
- **PK**: Federal Perkins Direct (typeaid 7)

**Source for Dependency Status (DEPST)** indicates where the value should be read to update the student's dependency status in the FLO File. A value of **S** (the default) reads from the SAM File. A value of **L** reads from the SNB/SNS File.

**Source for Expected Graduation Date (EXPGRAD)** indicates where the value should be read to update the student's expected date of graduation in the FLO File.
A value of \( B \) (the default) reads from the BIO File. A value of \( L \) reads from the SNB File.

**Update Loan Data (LOANDATA)** indicates when to stop updating loan data. The loan data fields are the anticipated gross amount, anticipated fee amount, anticipated net amount, loan approved amount, loan requested amount, expected date of graduation, enrollment start date, loan period begin and end dates and loan period code. A value of \( U \) (the default) causes update to these original fields. A value of \( B \) stops update to these original fields when an Add/Change Loan Record has been exported (F-SAMEXP is \( A \) or \( C \)). A value of \( P \) stops update to these fields when a promissory note has been printed (F-PROMSTAT is \( P \), \( S \) or \( A \)). A value of \( S \) stops update to these fields when a promissory note has been signed and returned (F-PROMSTAT is \( S \) or \( A \)). A value of \( T \) stops update to these fields when \( W\)-TOTPAID is greater than zero.

**Payment Out (PAYOUT)** controls whether the loan amount is distributed in one or multiple payments. A valid value of \( S \) (the default) creates a single payment; \( M \) creates multiple Disbursement Records.

**Schedule Type (SCHTYPE)** indicates which Schedule Record to use from the SCHEDULE section of the TBL File. The user should enter a valid value based on the SCHTYPE values already defined. The default is spaces.

**Update File (UPDATE)** controls whether the software updates the SAM Database or not. A value of \( Y \) (the default) updates the database; \( N \) does not.
**Direct Loan/Perkins Tab:** These are options that are specific to Direct Loan and Perkins type aids. NOTE: Perkins addition is in preparation for COD to be managing the Perkins loan program in the future.

SAMP35 control options AIDIDSEQ and LOANCODE are not supported in this table. The Loan Sequence Number and the Promissory Note Sequence Number are defaulted to 1 when a new FLO Record is created. The user may change these values after the FLO Record is created on the Common Record data tab in ProSAM.

**Stafford Loan Fee Rate** (DLFEERTE) sets the fee rate for calculating the fee amount for DL sub & unsub loans. Numeric values are valid. The default is zero.

🎉 Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 4%, the user should enter 040 in this field.
Plus Loan Fee Rate (DLPFEERT) sets the fee rate for calculating the fee amount for DL PLUS loans. Numeric values are valid. The default is zero.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 4%, the user should enter 040 in this field.

Plus Loan Interest Rebate Rate (DLPREBRT) controls the percentage used when calculating the Upfront Interest Rebate amount for a Direct Lending Parent loan. This must be a 3-digit numeric value and should be entered as follows: a one and half percent (1 ½%) fee charge may be entered as DLPREBRT=015. The default value is zero (000). When a value greater than zero is entered for this option, it will only be used when RATEOPT is set to O.

Please note: When RATEOPT=O, a value greater than zero must be entered for the DLPREBRT option.

Stafford Loan Interest Rate (DLINTRTE) sets the fee rate for the interest amount for DL sub & unsub loans. Numeric values are valid. The default is zero. The interest rate is for information purposes only.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 1.5%, the user should enter 015 in this field.

PLUS Loan Interest Rate (DLPINTRT) sets the fee rate for the interest amount for DL PLUS loans. Numeric values are valid. The default is zero. The interest rate is for information purposes only.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 1.5%, the user should enter 015 in this field.

Stafford Loan Interest Rebate Rate (DLREBRTE) controls the percentage used when calculating the Upfront Interest Rebate amount for a Direct Lending Stafford loan. This must be a 3-digit numeric value and should be entered as follows: a one and half percent (1 ½%) fee charge may be entered as DLREBRTE=015. The default value is zero (000). When a value greater than zero is entered for this option, it will only be used when RATEOPT is set to O.

Please note: When RATEOPT=O, a value greater than zero must be entered for the DLPREBRT option.
PKFEERTE (Perkins Direct Loan Fee Rate) controls the percentage used when calculating fee and net amounts for COD’s upcoming support of the Perkins Direct loan. *This option has been added in support of future anticipated legislation.* This must be a 3-digit numeric value and should be entered as follows: a three percent (3%) fee charge may be entered as DLPFEERT=030. The default value is zero (000). When a value greater than zero is entered for this option, it will only be used when RATEOPT is set to O.

Please note: When RATEOPT=O, a value greater than zero must be entered for the PKFEERTE option for Direct Loan schools.

PKINTRTE (Perkins Direct Loan Interest Rate) displays the interest rate percentage for that particular Perkins Direct loan for COD’s upcoming support of the Perkins Direct loan. At this time this value is for Information Only. *This option has been added in support of future anticipated legislation.* The default value is zero (000). When a value greater than zero is entered for this option, it will only be moved to the FLO record when RATEOPT is set to O.

PKREBRTE (Perkins Direct Loan Interest Rebate Rate) controls the percentage used when calculating the Upfront Interest Rebate amount for COD’s upcoming support of the Perkins Direct loan. *This option has been added in support of future anticipated legislation.* This must be a 3-digit numeric value and should be entered as follows: a one and half percent (1 ½%) fee charge may be entered as DLPREBRT=015. The default value is zero (000). When a value greater than zero is entered for this option, it will only be used when RATEOPT is set to O.

Please note: When RATEOPT=O, a value greater than zero must be entered for the PKREBRTE option for Direct Loan schools.
The (AAC) FLO Defaults Table, FFELP Tab

**FFELP Tab**: These are options that are specific to FFELP and Alternative Loan Type aids.

**Blank Lender** (*BLKLEND*) will determine if the Alternative Loan should be flowed if there is no Lender and/or Guarantor Id. When set to *A*, the FLO lender and Guarantor IDs will be left blank and the F-HOLDFLG will be set to ‘W’ (to prevent origination of the FLO record). When set to *Y*, SAMP35A will attempt to find the PRD record using the default Lender/Guarantor in the PMN Record. If not found, the LENDID/GUARID will be left blank and the F-HOLDFLG will be set to ‘W’ (to prevent origination of the FLO record). The default is *N* (do not create FLO record if there is not Lender or Guarantor ID).

**Disbursement Hold and Release** (*DISBHLD*) defines the initial value for the FLO disbursement Hold/Release indicators (F-DISHD01 thru F-DISHD04). This value
should reflect the default status defined in the school's profile with the lender. If the lender/school profile is set up to place new disbursements on HOLD until authorized for release, DISBHLD should be set to $H$ (the default). If the lender/school profile is set up to RELEASE disbursements unless the school indicates (via a post-guarantee change transaction) that the disbursement should be held, DISBHLD should be set to $R$.

**Enrollment Default Value** ($ENRLDEF$) indicates which value should be sent to the guarantor/lender for the enrollment status default value. A value of $F$ indicates full-time. A value of $H$ indicates half-time. A value of $L$ indicates less than half-time. The default is spaces.

**First Disbursement** ($FIRSTDIS$) determines if the HIGH dollar amount for non-Pell awards should be loaded to the first or last disbursement. When set to $Y$, the HIGH dollar amount will be loaded to the first disbursement (non-Pell). When set to $N$ (the default), the ODD dollar amount will be populated to the last disbursement (non-Pell).

Example:

FIRSTDIS=$Y$ – 1168, 1166, 1166
FIRSTDIS=$N$ – 1166, 1166, 1168

**Guarantor Processing Type Code** ($PROCTYP$) indicates the guarantor processing type that is requested for the loan application and promissory note for the initial send file. Valid values are: $CR$=school certification request. $GO$=guarantee only processing. $GP$=guarantee and print processing. $PG$=print and guarantee processing. $PO$=print only. The default is $GP$.

**Guarantor Stafford Loan Fee Rate** ($GFEERTE$) sets the fee rate for calculating the Guarantor fee amount for FFELP sub & unsub loans. Numeric values are valid. The default is zero.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 4%, the user should enter 040 in this field.
**Stafford Loan Interest Rate** (*INTRTE*) sets the fee rate for the interest amount for FFELP sub & unsub loans. Numeric values are valid. The default is zero. The interest rate is for information purposes only.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 1.5%, the user should enter 015 in this field.

**Lender Plus Loan Fee Rate** (*LPFEERT*) sets the fee rate for calculating the Lender fee amount for FFELP PLUS loans. Numeric values are valid. The default is zero.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 4%, the user should enter 040 in this field.

**Enrollment Default Value** (*ENRLDEF*) indicates which value should be sent to the guarantor/lender for the enrollment status default value. A value of *F* indicates full-time. A value of *H* indicates halftime. A value of *L* indicates less than halftime. The default is spaces.

**Lender ID and Guarantor Agency Code Update** (*LENGAPDT*) allows the user to specify if the Lender ID and Guarantor Code information on BIO should be moved to the FLO record. A value of *Y* (the default) will move the values from BIO to FLO. A value of *N* will not update the FLO fields.

**Round Amount** (*ROUNDAMT*) determines if the gross disbursement amounts should be calculated based on rounding or truncation. When set to *Y* (the default) rounding will be used. When set to *N*, truncation will be used.

Example: $3500.00 / 3 terms (each disb = $1166.6666)

ROUNDAMT=*$Y* – 1166, 1167, 1167

ROUNDAMT=*$N* – 1166, 1166, 1168 (FIRSTDIS = *N*)

1168, 1166, 1166 (FIRSTDIS=*Y*)

**Guarantor Plus Loan Fee Rate** (*GPFEERT*) sets the fee rate for calculating the Guarantor fee amount for PLUS loans. Numeric values are valid. The default is zero.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 4%, the user should enter 040 in this field.
Lender Stafford Loan Fee Rate (LFEERTE) sets the fee rate for calculating the Lender fee amount for FFELP sub & unsub loans. Numeric values are valid. The default is zero.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 4%, the user should enter 040 in this field.

Plus Loan Interest Rate (PINTRT) sets the fee rate for the interest amount for FFELP PLUS loans. Numeric values are valid. The default is zero. The interest rate is for information purposes only.

Please note: This field is a percentage field with an implied decimal, e.g., if the fee rate is to be 1.5%, the user should enter 015 in this field.
Federal Grants/Loans Tab: These options are specific to Federal Grants such as Pell, ACG and Smart typeaids and both DL and FFELP loans.

Pell / Federal Grants Typeaids

Pell Eligible Flag (PELLELG) determines whether the Pell Eligible Flag value (ProSAM label: Pell Eligible Flag on the Flags tab in Verification Review) in the Federal Methodology column will be used to determine Pell Eligibility or if the value in the Revised column will be used. F (the default value) will select the Federal Methodology column. The value R will select the Revised Column value. The value B will look first at the Federal Methodology column and then, if blank, will look at the Revised column. A value N will bypass the Pell eligible check and create FLO and DIS records.

Please note: PELLELG set to N is non-standard, use with care.
**Update Pell Data** *(PELLDATA)* indicates when to stop updating FLO and DIS data. FLO data fields that would be updated are: Anticipated Gross Amount *(F-GROSSAMT)*, Anticipated Fee Amount *(F-FEEAMT)*, Anticipated Net Amount *(F-NETAMT)*, Approved Amount *(F-AMTAPP)*, Requested Amount *(F-REQLOAN)*, Expected Date of Graduation *(F-PROGDATE)*, Enrollment Start Date *(F-STRTDATE)*, Period Begin Date *(F-PERBEG)*, Period End Date *(F-PEREND)*. A value of \textbf{U} (the default) causes these original fields to be updated. A value of \textbf{B} stops updating these original fields when an Add/Change Record has been exported *(F-SAMEXP is A or C)*. A value of \textbf{T} stops updating these fields when the Award Total Paid amount *(W-TOTPAID)* is greater than zero.

**Pell School Code** *(PELSCHL)* This is the Pell school code to be used when building the Award ID for ACG & SMART grants. The Pell school code is usually different than the DL/FFELP school code and should be defined separately. If the PELSCHL option is not defined, the value from the SCHCODE option will be used.

**DL/FFELP Typeaids**

**Load Parental SSN and Name Information** *(LOADSSN)* controls whether or not the Father/Mother's name and SSN should be loaded to the PSN file, Person Type = B1, record directly from the ISIR data which is stored in the SNP file. A value of \textbf{Y} (the default) moves the Father's name (data element: AP-NAMEFL) and SSN (data element: AP-SSNFAT) to the PSN file. If the Father's information is blank, the Mother's name (data element: AP-NAMEML) and SSN (data element: AP-SSNMOT) are moved to the PSN file fields. A value of \textbf{N} will not update the PSN file parental information.

**PLUS Default Borrower Address Type** *(PLUSDEF)* populates the FLO field, ADTYPE (Address Type) for PLUS loans. The value entered must be a valid, defined code for the field from the data element dictionary. This value should also be the address type most commonly used to record the borrower’s (parent’s) address in the BSP file. The address type entered in the FLO.ADTYPE field may be changed later online on the Common Record Data Person Address tab. There is no default value.

**Update Address for Plus Loan Borrower** *(PLUSADDR)* indicates whether or not the student's phone and permanent address information should be used as the borrower's information for a Plus loan. A value of \textbf{Y} updates the borrower's information with the student's data. A value of \textbf{N} (the default) does not.
**Promissory Note Data Option (PNOTE)** indicates if the Master Promissory Note information should be moved from the Biographic file to the FLO record. The value **N** will not move Master Promissory Note information. The default value of **Y** will move the promissory note data as follows:

When the Biographic MPNStat is equal to A or D and the loan to be (re)-originated is a Subsidized, Unsubsidized or former HEAL Unsubsidized Stafford (TYPEAIDs = B, C or H) and when F-PROMSTAT is blank, N, or R the following data is updated on the FLO record:  F-PROMSTAT is updated to A; F-LOANSTAT is updated to R; F-PNSIGN is updated to Y; and the current date is moved to: F-PDTESIGN, F-PNOTEREC, F-PNOTEPRF, F-PNOTESNT.

When the Biographic FMPNST is equal to A or S and the loan to be (re)-originated is a Subsidized, Unsubsidized or former HEAL Unsubsidized Stafford (TYPEAIDs = X, Y or 1) and when F-PROMSTAT is blank, N, or R the following data is updated on the FLO record:  F-PROMSTAT is updated to P; F-LOANSTAT is updated to R; F-PNSIGN is updated to Y; and the current date is moved to: F-PDTESIGN, F-PNOTEREC, F-PNOTEPRF, F-PNOTESNT.

**Please note:** This option does not affect PLUS loan processing.
ADD – Award Document Definition Table

The ADD Award Document Definition table provides the ability to define the individual document(s) that can be associated to one or more than one Document Container and needs to be done prior to trying to add documents to a Document Container. The documents defined in this table are specifically associated with an award or type of aid so that special Disbursement requirements can be performed for that award. Whereas, documents defined in the Documents (DOC table described in detail later in this document) define documents that are generally required of the student to meet Application or File Completion status. In addition, the length of the Document ID in this table is 8 alpha/numeric characters where the documents in the DOC table are limited to 2 characters.

The first screen displays a summary of all the existing Award Document Records in the table. To change any information, either double click on a selected record or highlight the desired record and select the Detail tab. To delete a record, highlight the record and select the Delete Icon from the toolbar. To add records, select the New icon from the toolbar and a blank Detail screen will be displayed for entry.

The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform multiple entries. To leave insert mode, you would need to select the summary tab. The summary tab will be refreshed with the newly added documents. The search functionality can be used to display the listing starting with a desired document by entering the Document ID or a portion of the Document ID and then selecting the Search button.
The (ADD) Award Documents Definition Table, Summary Tab
The (ADD) Award Document Definition Table, Detail Tab

<table>
<thead>
<tr>
<th>Document ID:</th>
<th>PCONF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>Personal and Confidential Statement</td>
</tr>
</tbody>
</table>
ADR – Award Document Container Table

The ADR table allows the user to define which document(s) (from the ADD Award Document Definition table) are to be associated with each Award Document Container and whether they are mandatory (will prevent disbursement if not received) or optional (will exist for visual reference for information only and not prevent disbursement). When a Document Container ID is entered in ProSAM for a specific Aidid in the Aid Program Definition/Codes tab, and then subsequently the award is granted to a student, the Required Documents will be shown in the Packaging module Documents/User Data. The documents are displayed as read-only information based on the Document Container that is assigned to the aid program, including the associated Document Description from the ADD table record. Additionally, these documents are displayed in the Document Tracking module but will have a special icon associated with it to easily identify these documents. The icon without the ribbon signifies that the document is required, while the icon with the ribbon signifies that the document has been received. Note: these types of documents have a Completion status of “Award Only” and have no bearing on the student’s Application or File Completion status (see Documents DOC table for more information regarding Application or File Complete documents).

The first screen displays a summary of all the existing Award Document Containers in the table. To change any information, either double click on a selected record or highlight the desired record and select the Detail tab. To delete a record, highlight the record and select the Delete Icon from the toolbar.
The (ADR) Award Document Container Table, Summary Tab
To add records, select the New icon from the toolbar, a blank Detail screen will be displayed for entry. Enter the Container ID (4 alpha/numeric characters) and Title. The available documents listing is displayed by either entering a value to start a search from or leave blank and select the Search button. A listing will be displayed on the right side of the window with all of the documents that were already defined in the Award Documents Definition (ADD) table. Highlight the document you want to add to the container then select the arrow button pointing to the left located between the columns to move the document to the left column. The Document Requirements popup will be displayed.

The (ADR) Award Document Container Table, Detail Tab
Select the desired values for that document for the Disbursement Requirements (whether or not the document is required prior to disbursement), Use Date and Use Status are the values that are populated via the SAMT10 transactions that post the documents to ProSAM Document Tracking. When Use Date is Yes the date field will be populated and Use Status moves the value indicated to the completion status of the document. NOTE: If Use Date is Yes and Use Status is blank the Completion Status will automatically be considered as complete (see ProSAM Document Tracking documentation for additional information on this topic). Press the OK button to add the document to the left column or Cancel to begin the process again.

Continue moving documents until all desired documents have been added for that container. Once a document has been assigned to a Container that document will no longer display in the available documents listing. In other words, a document cannot be listed as required more than once.

To leave insert mode select the summary tab. A popup dialog will be displayed asking if you want to add the record. Select Yes to continue adding the record or No to cancel the addition of the documents. If Yes is selected, the documents are added to the Container and the Summary screen is refreshed displaying the new Container that was added.
Modifications to add or remove documents once a Container ID already exists, is easily done by double clicking on the Container ID to be modified. Documents can then be removed by selecting it in the left column and hit the arrow button pointing to the right, the document will be removed. If adding a document to an existing container, select the document from the right column “Available Documents” click on the arrow button pointing to the left. The Disbursement Requirements popup will be displayed for entry. Select the OK button to continue. Note: Disbursement Requirements are updatable by double clicking on the document in the left column. The popup is displayed for modification. When finished, select the OK button to continue. In this case be sure to SAVE the modification(s) before returning to the Summary tab.

SDR – Supplemental Data Requirements Table

This table allows the user to define extended text that is associated with documents in the DOC Documents table. This extended text is printed on “Missing Information Letters” to the students to better define the information that is being requested. Along with the above this table can be used to notate URL information or web pages, budget components or extended text for the Award documents.

The first screen displays a summary of all the existing Data Types in the table. To change any information, either double click on a selected record or highlight the desired record and select the Detail tab. To delete a record, highlight the record and select the Delete Icon from the toolbar. Additionally, filtering fields have been added to assist with locating the desired element to work with.

To add records, select the New icon from the toolbar, a blank Detail screen will be displayed for entry. Select the Data Type from the drop down ie., Document. Enter the Document ID (this must match the “short” description that is defined in the Documents table. Select the applicable Usage from the drop down, description or
Terms and Conditions. Select the Information Format, Text or URL that will be used to determine how the information is to be formatted or used. Last enter the text that is to be displayed. This is open text and can be easily edited, similar to the Memoranda Module in ProSAM. Once all entries are completed be sure to save.

The (SDR) Supplement Data Requirements Table, Summary Tab
The (SDR) Supplement Data Requirements Table, Detail Tab
**BUD – Budgets Table**

This table is used to build a budget for a student, taking into account his or her application and need analysis information such as whether they are a resident of the state, living on or off campus, have any fees or book charges associated with their declared major, etc.

The Budget Table defines standard budget types for these components and the default budget amount and description for each. The Groups Table, described later in this document, defines which students are assigned a particular budget based on their given information.

The first screen displays a summary of all the existing Budget Records in the table. To change any information, either double click on a selected record or highlight the desired record and select the Detail tab. To delete a record, highlight the record and select the Delete Icon from the toolbar. To add records, select the New icon from the toolbar and a blank Detail screen will be displayed for entry.

The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform multiple entries. To leave insert mode, you would need to select the summary tab.

The first field is the **BUDGET TYP**, a 2-character field to distinguish each Budget Record. The **AMOUNT** field is the amount allotted for the Budget Type. The **DESC** field is the description for this budget type.
The (BUD) Budgets Table, Summary Tab
The (BUD) Budgets Table, Detail Tab

<table>
<thead>
<tr>
<th>Budget Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1A</td>
<td>1,095</td>
</tr>
</tbody>
</table>

Description: Assoc Degree Tuition FT

<table>
<thead>
<tr>
<th>Cost Type</th>
<th>Payment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TDD Expense: Priority:
CLS – Class Table
The Class Table, used by SAMR73, defines class levels in terms of specific student levels, such as freshman or sophomore. As such, it is similar in format and function to the Definition Table. The main differences are that the Class Table is used with SAMR73, while the Definition Table is used with SAMR71 and SAMR75. Also, six general class years may be defined with the Class Table, while the Definition Table may only use three predefined general student levels: undergraduate, graduate and other. The user may associate up to eight specific student levels, represented by Planned Academic Level (PACDLVL) Codes, with each class year.

To add records, select the New Icon a blank Detail tab will be displayed for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, select the summary tab.
The (CLS) Class Table, Detail Tab
COD – Codes Table

The Notification Module and its letter writer (SAMN25) use this table. All the rest use the DED. This table authorizes new translations from the DED. In addition, this table contains the values that are loaded each year from the CODESx.dat file. That file defines the values provided/accepted by the Department of Education for selection of the Major for use with ACG grants.

To add records, select the New Icon a blank Detail tab will be displayed for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The ELEMENT Name field contains the Data Element Name. The VALUE field is where the coded name is entered. Enter the description of the element in the DESCRIPTION field.
### The (COD) Codes Table, Detail Tab

<table>
<thead>
<tr>
<th>Element Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMAJOR</td>
<td>010901 *</td>
</tr>
</tbody>
</table>

Description: Animal Sciences, General
COM – Commitment Table

This table is used in scheduling an award, which uses several parts of the table to allocate an annual financial aid award amount to one or more of 12 payment periods (e.g. semesters, quarters, months). In addition, scheduling controls begin and end dates for award packages, actual enrollment criteria and when commitment for payment is made.

These records indicate the specific date a commitment for payment is to occur for each of the twelve Payment Periods. Until an award payment has been committed to payment, no payments can be disbursed. Commitment also depends on the Commitment Schedule code (COMMSCH) described below.

The Commitment Schedule Record determines which Period Offers are to be paid during each payment cycle. Commitment takes place in each payment cycle when the Automatic Commitment Program is executed on or after the specified date. Commitment Schedule Records must be entered in ascending order by Commitment Period and Commitment Date within a single fiscal year.

To add records select the New Icon from the toolbar and a blank Detail tab will display for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The COMMITMENT SCHEDULE is user-defined. The user must be consistent and use the same Commitment Schedule wherever it is referenced. The COMMITMENT PERIOD is one of the twelve payment periods. The COMMITMENT DATE is the first date a commitment is to occur for that specific period.
The (COM) Commitment Table, Summary Tab
The (COM) Commitment Table, Detail Tab
DEF – Definition Table

The Definition Table, used by SAMR71 and SAMR75, to identify general academic classes: undergraduate, graduate and other, in terms of specific academic levels, e.g. freshman, sophomore, junior or senior. This is done because the reports require student levels at the broader classifications of undergraduate and graduate, while ProSAM and the institution's files store such information only at more detailed levels such as freshmen, sophomore, junior or senior.
The (DEF) Definition Table, Detail Tab

<table>
<thead>
<tr>
<th>Name: UNDERGRADUATE</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 02 03 04</td>
</tr>
</tbody>
</table>
DIA – Diagnostics Table

This dynamic table enables the user to define specific criteria using Groups to assist the Financial Aid office or Student Self help via an entry into the ProSAM Diagnostics module or a web interface to analyze the reason certain events such as “Why hasn't my Financial Aid disbursed?” not transpired on a student’s record. In addition, a webpage is displayed that includes instructions on how to resolve the situation. (Please see the SAMU41 documentation for additional information.)

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

NOTE: The Diagnostics Module in ProSAM is an Optional Module and is not part of the Standard or Base product.
The (DIA) Diagnostics Table, Summary Tab
The (DIA) Diagnostics Table, Detail Tab

<table>
<thead>
<tr>
<th>Code</th>
<th>1001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>You are not properly admitted</td>
</tr>
<tr>
<td>Web Page</td>
<td><a href="http://www.univ.edu/admissions">www.univ.edu/admissions</a></td>
</tr>
</tbody>
</table>
DOC – Documents Table

This table contains a list of documents a student may be required to provide the financial aid office. Not all documents listed are required for each student. The Track Table is used for defining which of these documents are required for each student or group of students.

This table also defines which documents are **Standard** and which are **Additional**. Up to 92 documents can be defined. Documents that are numbered 01 through 15 are Standard documents. All other documents are considered Additional documents in the system. Additional documents 16 through 50 are reserved for **File Complete** requirements. Additional documents 51 through 92 are reserved for **Application Complete**.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The **DOCUMENT NUMBER** field is where the number for the document is listed.

*Again please note: numbers 1 through 15 are reserved for Standard Documents, 16 through 92 are Additional Documents. The Additional Documents are further divided into those required to be File Complete, documents 16-50, and those that are required for Application Complete, 51 through 92.*

The **DESCRIPTION** field should be an exact description of the document and is the description that displays on the Document Tracking screen in ProSAM. The **SHORT** Description field is used for a short, 8-character code for the document.

The **IRS FLAG** field is a 1-character field indicating if the document is an IRS document and whether it's a Parent's or Student's IRS form.
The (DOC) Documents Table, Summary Tab
The (DOC) Documents Table, Detail Tab
ENR – Enrollment Table

The Enrollment Record (ENRL) is used by ProSAM’s Disbursement Module to control how much is disbursed based on the student enrollment level. For example, an enrollment code of F indicating a full-time student, and a percentage of 100 will allow Disbursement to commit payment for 100 percent of the Total Offered a student for a certain period.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The Detail tab allows the user to enter the ENROLLMENT Code, which is the level of enrollment, such as full-time, halftime, etc. and the PERCENTAGE for that enrollment code.
The (ENR) Enrollment Table, Summary Tab

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Time</td>
<td>100</td>
</tr>
<tr>
<td>Half-Time</td>
<td>050</td>
</tr>
<tr>
<td>Less Than</td>
<td>025</td>
</tr>
<tr>
<td>Not Enrolled</td>
<td>000</td>
</tr>
<tr>
<td>Three Quarters</td>
<td>075</td>
</tr>
</tbody>
</table>
The (ENR) Enrollment Table, Detail Tab

<table>
<thead>
<tr>
<th>EnrollCode</th>
<th>Full-Time</th>
</tr>
</thead>
</table>

| Percent | 100       |
FNV - Verification Table

The Verification Table is used for the Compliance Module in ProSAM to map a financial aid processing year to an IRS tax year. For example, for the 2010-2011 financial aid processing year, the tax year would be 09. The tax year value controls which verification edits are performed.

The Verification Record is used by SAMC30x, batch Verification.

The (FNV) Verification Table
LAB – Label Table

This table allows the user to dynamically redefine the label that is displayed to the ProSAM screen for any User Codeable field thus making the labels more meaningful and unique to each individual university. Since the labels are redefined in this table, the display will affect all of the users at the university when they display a screen which had labels that had been redefined. Important Note: this table is year specific so the labels can be changed to reflect different uses of a user field from one year to the next. A complete listing of the re-definable label and data element is below.

Additionally, the re-defined labels where user codes are displayed in summary list boxes, like Aid Program, will display the re-defined value rather than the Sigma generic label. These modules include:

- Aid Program (PGM)
- Award History (HAW)
- Promissory Note (PMN)
- Disbursement (ADS/EDS)
- Term App Summary (SUT)

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The Detail tab allows the user to enter the database FILE NAME from the DED such as BIO for Demographic data, the Data ELEMENT NAME (must match exactly from the DED), and the new DESCRIPTION which displays as the redefined label on the applicable screen in ProSAM. Note: The actual File Name and Element Name can be displayed by going to the ProSAM screen, select the user field that you want to redefine the label for and then press the F1 key.
The (LAB) Labels Table, Summary Tab
The (LAB) Labels Table, Detail Tab

<table>
<thead>
<tr>
<th>File Name</th>
<th>Element Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIO</td>
<td>USER10</td>
</tr>
</tbody>
</table>

Description: Work-Study Rate
<table>
<thead>
<tr>
<th>File</th>
<th>Element</th>
<th>File</th>
<th>Element</th>
<th>File</th>
<th>Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADS</td>
<td>USERCD1</td>
<td>EDS</td>
<td>*AENRLT2</td>
<td>SAM</td>
<td>USER10</td>
</tr>
<tr>
<td>ADS</td>
<td>USERCD2</td>
<td>EDS</td>
<td>*AENRLT3</td>
<td>SAM</td>
<td>USER11</td>
</tr>
<tr>
<td>ADS</td>
<td>USERNR1</td>
<td>EDS</td>
<td>*AENRLT4</td>
<td>SAM</td>
<td>USER12</td>
</tr>
<tr>
<td>ADS</td>
<td>USERNR2</td>
<td>EDS</td>
<td>*AENRLT5</td>
<td>SAM</td>
<td>USER13</td>
</tr>
<tr>
<td>ADS</td>
<td>*AENRLT1</td>
<td>EDS</td>
<td>*AENRLT6</td>
<td>SAM</td>
<td>USER14</td>
</tr>
<tr>
<td>ADS</td>
<td>*AENRLT2</td>
<td>EFM</td>
<td>USERCD1</td>
<td>SAM</td>
<td>USER15</td>
</tr>
<tr>
<td>ADS</td>
<td>*AENRLT3</td>
<td>EFM</td>
<td>USERCD2</td>
<td>SAM</td>
<td>USER16</td>
</tr>
<tr>
<td>ADS</td>
<td>*AENRLT4</td>
<td>FLO</td>
<td>USERCD1</td>
<td>SAM</td>
<td>USER17</td>
</tr>
<tr>
<td>ADS</td>
<td>*AENRLT5</td>
<td>FLO</td>
<td>USERCD2</td>
<td>SAM</td>
<td>USER18</td>
</tr>
<tr>
<td>ADS</td>
<td>*AENRLT6</td>
<td>FLO</td>
<td>USERCD3</td>
<td>SAM</td>
<td>USER19</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD1</td>
<td>FLO</td>
<td>USERCD4</td>
<td>SAM</td>
<td>USER20</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD2</td>
<td>FLO</td>
<td>USERCD5</td>
<td>SAM</td>
<td>USERNR1</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD3</td>
<td>FLO</td>
<td>USERCD6</td>
<td>SAM</td>
<td>USERNR2</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD4</td>
<td>FLO</td>
<td>USERCD7</td>
<td>SAM</td>
<td>USERNR3</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD5</td>
<td>FLO</td>
<td>USERCD8</td>
<td>SAM</td>
<td>USERNR4</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD6</td>
<td>FLO</td>
<td>USERNR1</td>
<td>SAM</td>
<td>USERNR5</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD7</td>
<td>FLO</td>
<td>USERNR2</td>
<td>SAM</td>
<td>USERNR6</td>
</tr>
<tr>
<td>AWD</td>
<td>USERCD8</td>
<td>FLO</td>
<td>USERNR3</td>
<td>SAM</td>
<td>USERNR7</td>
</tr>
<tr>
<td>AWD</td>
<td>USERNR1</td>
<td>FLO</td>
<td>USERNR4</td>
<td>SAM</td>
<td>USERNR8</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD1</td>
<td>HAW</td>
<td>USERCD1</td>
<td>SAM</td>
<td>ATHLET1</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD2</td>
<td>HAW</td>
<td>USERCD2</td>
<td>SAM</td>
<td>ATHLET2</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD3</td>
<td>HAW</td>
<td>USERNR1</td>
<td>SAM</td>
<td>SPTAL1</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD4</td>
<td>HAW</td>
<td>USERNR2</td>
<td>SAM</td>
<td>SPTAL2</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD5</td>
<td>MSF</td>
<td>USERCD1</td>
<td>SAM</td>
<td>SPTAL3</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD6</td>
<td>MSF</td>
<td>USERCD2</td>
<td>SAM</td>
<td>SPTAL4</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD7</td>
<td>PGM</td>
<td>USERCD1</td>
<td>SUT</td>
<td>USER1</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD8</td>
<td>PGM</td>
<td>USERCD2</td>
<td>SUT</td>
<td>USER2</td>
</tr>
<tr>
<td>BIO</td>
<td>USERCD9</td>
<td>PGM</td>
<td>USERCD3</td>
<td>SUT</td>
<td>USER3</td>
</tr>
<tr>
<td>BIO</td>
<td>USER10</td>
<td>PGM</td>
<td>USERCD4</td>
<td>SUT</td>
<td>USER4</td>
</tr>
<tr>
<td>BIO</td>
<td>USER11</td>
<td>PGM</td>
<td>USERCD5</td>
<td>SUT</td>
<td>USER5</td>
</tr>
<tr>
<td>BIO</td>
<td>USER12</td>
<td>PGM</td>
<td>USERCD6</td>
<td>SUT</td>
<td>USER6</td>
</tr>
<tr>
<td>BIO</td>
<td>USER13</td>
<td>PGM</td>
<td>USERCD7</td>
<td>SUT</td>
<td>USER7</td>
</tr>
<tr>
<td>BIO</td>
<td>USERNR1</td>
<td>PGM</td>
<td>USERCD8</td>
<td>SUT</td>
<td>USER8</td>
</tr>
<tr>
<td>BIO</td>
<td>USERNR2</td>
<td>PGM</td>
<td>USERNR1</td>
<td>SUT</td>
<td>USER9</td>
</tr>
<tr>
<td>BIO</td>
<td>USERNR3</td>
<td>PRD</td>
<td>USERCD1</td>
<td>SUT</td>
<td>USER10</td>
</tr>
<tr>
<td>BIO</td>
<td>INDEX1</td>
<td>PRD</td>
<td>USERCD2</td>
<td>SUT</td>
<td>USER11</td>
</tr>
<tr>
<td>BIO</td>
<td>INDEX2</td>
<td>PRD</td>
<td>USERCD3</td>
<td>SUT</td>
<td>USER12</td>
</tr>
<tr>
<td>BIO</td>
<td>INDEX3</td>
<td>PRD</td>
<td>USERCD4</td>
<td>SUT</td>
<td>USER13</td>
</tr>
<tr>
<td>BIO</td>
<td>INDEX4</td>
<td>PRD</td>
<td>USERNR1</td>
<td>SUT</td>
<td>USER14</td>
</tr>
<tr>
<td>BIO</td>
<td>INDEX5</td>
<td>PRD</td>
<td>USERNR2</td>
<td>SUT</td>
<td>USER15</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD1</td>
<td>PRD</td>
<td>USERNR3</td>
<td>SUT</td>
<td>USER16</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD2</td>
<td>PRD</td>
<td>USERNR4</td>
<td>SUT</td>
<td>USER17</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD3</td>
<td>PSN</td>
<td>USERCD1</td>
<td>SUT</td>
<td>USER18</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD4</td>
<td>PSN</td>
<td>USERCD2</td>
<td>SUT</td>
<td>USER19</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD5</td>
<td>PSN</td>
<td>USERCD3</td>
<td>SUT</td>
<td>USER20</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD6</td>
<td>PSN</td>
<td>USERCD4</td>
<td>SUT</td>
<td>USERNR1</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD7</td>
<td>PSN</td>
<td>USRN1</td>
<td>SUT</td>
<td>USERNR2</td>
</tr>
<tr>
<td>DIS</td>
<td>USERCD8</td>
<td>PSN</td>
<td>USRN2</td>
<td>SUT</td>
<td>USERNR3</td>
</tr>
<tr>
<td>DIS</td>
<td>USERNR1</td>
<td>PSN</td>
<td>USRT1</td>
<td>SUT</td>
<td>USERNR4</td>
</tr>
<tr>
<td>DIS</td>
<td>USERNR2</td>
<td>SAM</td>
<td>USERFLG</td>
<td>SUT</td>
<td>USERNR5</td>
</tr>
</tbody>
</table>
The (LAB) Labels Table, re-definable elements listing

**MAP – Map Schedule Table**

The user-defined Map Record indicates which of the six enrollment fields will be used to specify Fall, Spring and Summer terms. The Map Table is a vital record that affects the processing of students throughout ProSAM. The Map Table is used in the calculation of Family Contribution, for scheduling Student Aid and during Automatic Packaging and Disbursement processes.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The Type Term (**TYPTRM**) field is user-defined. The user must be consistent in using the same value for Type Term throughout the system as it was entered on the Map Record. The **PERIOD** fields correspond to the 12 months beginning with July through June. An example of a Map Record is below:

<table>
<thead>
<tr>
<th>Type Term</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>6</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>
Workbench Manual

This record shows Enrollment Field number three as the Fall term (months August through December), Enrollment Field number five as the Spring term (months January through April) and Enrollment Field number six as the Summer months (May, June, and July).

The (MAP) Map Schedule Table, Summary Tab
The (MAP) Map Schedule Table, Detail Tab
OPT – Options Table

The OPT Table in Workbench is used to connect ProSAM’s Special Purpose Icons with jobscripts to run batch programs for the specific student that apply the institution’s business practices. A U41 key file is created for the particular student from the ProSAM client before the process is run. This achieves the same results as if the student had been run through the general batch processing.

To Create or Add an OPT record select the New Icon from the toolbar a blank Detail tab will be displayed. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

Process ID is an eight character user defined value, however, the first 2 characters “must” begin with the 2 letter code listed below to connect the OPT table entry to the ProSAM tool bar Special Icons. The remainder of the code is user defined.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TB</td>
<td>Budget Assignment</td>
</tr>
<tr>
<td>TC</td>
<td>Compliance</td>
</tr>
<tr>
<td>TD</td>
<td>Disbursement</td>
</tr>
<tr>
<td>TI</td>
<td>Diagnostics</td>
</tr>
<tr>
<td>TN</td>
<td>EFC Calculation</td>
</tr>
<tr>
<td>TP</td>
<td>Packaging</td>
</tr>
<tr>
<td>TS</td>
<td>Student Fees (UKY)</td>
</tr>
<tr>
<td>TT</td>
<td>Track Assignment</td>
</tr>
<tr>
<td>TX</td>
<td>Batch Jobs (Not Avail.)</td>
</tr>
<tr>
<td>AN</td>
<td>Letters (Track, Award, PNotes)</td>
</tr>
<tr>
<td>IC</td>
<td>ISIR Compare</td>
</tr>
<tr>
<td>PK</td>
<td>Create Loan Orig. (FLO)</td>
</tr>
<tr>
<td>PS</td>
<td>Packaging Schedule</td>
</tr>
<tr>
<td>TR</td>
<td>Doc Imaging (UMISS, UKY and MDC)</td>
</tr>
</tbody>
</table>

Role Identifier can either be $DEFAULT which allows all users access (as long as they have security access to the tool bar icon) to the script. These can also be setup for individuals by entering a specific Role, thus all users assigned to that role would be able to execute the script.

Description is any description you choose to describe the job. NOTE: This description is displayed to the user in ProSAM when selecting which Job Script to run so make it recognizable to the end user.
Job Identifier must match exactly the name of the jobscript (JCL) in the /job directory, see example below. Be sure to use the "Underscore" if one is used in the job name.

```
/sigma/source/job > ls psonline*
psonline_altr.job  psonline_lncrte.job  psonline_tltr.job
psonline_bud.job  psonline_ncalc.job  psonline_tltr.job.out
psonline_disb.job  psonline_pkg.job  psonline_trk.job
```
The (OPT) Options Table, Detail Tab
PRG - Program Table

Program Table Records, used by all programs in the *Reporting and Analysis Module*, specify the aid programs to be counted in reporting, as well as characteristics of each program. Each record corresponds to a single aid program. The Program Record has numerous fields, not all of which are used by all Reporting and Analysis programs.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab. The screen is dynamically painted to allow entry of only the appropriate elements for each Identifier or type of report. This assists the user in populating the necessary information for each report.

Note: The Identifier field will filter or suppress any unnecessary fields that do not apply to that particular program making it easier for the user to know which fields are required for that program.
The (PRG) Program Table, Summary Tab
The Program Table is a complex one. A breakdown of how the Program Table is used in each of the Reporting and Analysis programs follows.

**SAMR71x PROGRAM RECORD – FISAP (Aidyr specific program)**

The **Identifier** *(Reporting and Analysis Program Number)* is a 2-digit field (use 71) identifying which Reporting and Analysis program will be used with the Program Record.

The **Aidid** *(Aid Program Identifier)* is a 4-digit field containing the user-defined code associated with the desired aid program. Any aid program whose identifier is given on a Program Record will be tallied on the report.
The **Name** is a 5-character alphanumeric field that holds a description or abbreviation of the aid program on that record. This description becomes a label on the FISAP Report.

The **Fund Source** is a 1-character code that tells whether the funds for this program come from federal, state or institutional sources. This helps SAMR71 determine which aid programs should be reported in what FISAP sections, as some sections report only federal programs, while Report #4 of the FISAP has a row for state and institutional programs. An **F** in this field indicates that Pell Grant is a federal program.

The **Match** field is a 1-character field that tells SAMR71 whether the aid program on that record is used for SEOG Matching. Federal regulations are such that for every SEOG dollar paid, a dollar must be paid through another aid program. Not all aid programs are used for matching. If the aid program on the record is SEOG Matching, an **M** is coded in this field so that proper reporting of matching funds may be done. Otherwise, the field is left blank.

**SAMR72 PROGRAM RECORD - AID PROGRAM PROFILE REPORT**

SAMR72 uses very few Program Record fields as it is a general report generator. Program Records with SAMR72 merely identify what aid programs will be used in the general report and give associated report labels. The relevant fields are as follows:

The **Identifier** (*Reporting and Analysis Program Number*) is a 2-digit field (use 72) identifying which Reporting and Analysis Program will be used with the Program Record.

The **Long Name** field holds the complete name or description of the aid program being categorized. Up to 30 alphanumeric characters may be included.

The **Aidid** (*Aid Program Identifier*) is a 4-digit field that holds the user-defined code associated with the desired aid program. Any Aid Program whose Aid Program Identifier is given on a Program Record will be tallied on the report.
SAMR73 PROGRAM RECORD - HEALTH PROFESSIONS REPORT

The **Identifier** *(Reporting and Analysis Program Number)* is a 2-digit field (use 73) identifying which Reporting and Analysis program will be used with the Program Record.

The **Aidid** *(Aid Program Identifier)* is a 4-digit field holding the user-defined code associated with the desired aid program.

The **Name** *(Short Name)* is a 5-character field holding a brief description or abbreviation of the aid program on that record. This description becomes a label on the Health Professions Report.

The **UG TypAid** *(Undergraduate Type Aid)* field is a 1-character code specifying the type of aid program for undergraduates only. A **G** means the aid program on that record is a grant; an **S** means the program is a scholarship; an **L** designates a loan program; and an **E** represents some form of employment. These designations help SAMR73 decide in what section of the report each program should be reported.

The **GR TypAid** *(Graduate Type Aid)* is a 1-character code that is identical to the Undergraduate Type Aid above except that it is used with graduate student reporting. Thus, in specifying what kind of program this record defined, a **G** means the aid program is a grant; an **S** means the program is a scholarship; an **L** designates a loan program; and an **E** represents some form of employment. These designations help SAMR73 decide in what section of the report each program should be reported.
**SAMR75 PROGRAM RECORD - OFFICE OF CIVIL RIGHTS REPORT**

The **Identifier** *(Reporting and Analysis Program Number)* is a 2-digit field (use 75) identifying which Reporting and Analysis program will be used with the Program Record.

**UG SubAid** *(Undergraduate Subtype Aid)* is a 2-digit field that establishes a reporting order within a particular type of aid. If there are three grant programs classified as grants by the Undergraduate Type Aid field, the program with **01** in this field will be reported first, followed by that with **02**, then **03**, etc. Accompanying the listing for each program is the Long Name field. If several aid programs in the same aid category have the same Undergraduate Subtype Aid value, their data will be combined, and they will be reported together. All such identically sub-typed aid programs should use the same Long Name field to make the report label clear and meaningful. If different Long Name fields are used, the last Long Name will be used to identify all programs.

*Please note: This field handles Undergraduate aid programs only.*

The **Aidid** *(Aid Program Identifier)* is a 4-digit field which holds the user-defined code associated with the desired aid program. Any aid program whose Aid Program Identifier is given on a Program Record will be tallied on the report.

The **GR SubAid** *(Graduate Subtype Aid)* is a 2-digit field that functions precisely like the Undergraduate Subtype Aid field above, except that it categorizes graduate programs only.

The **UG TypAid** *(Undergraduate Type Aid)* is a 1-character code specifying the type of aid program for undergraduates only. A **G** means the aid program on that record is a grant; an **S** means the program is a scholarship; an **L** designates a loan program; and an **E** represents some form of employment. These designations help SAMR75 decide in what section of the report each program should be reported.

The **GR TypAid** *(Graduate Type Aid)* is a 1-character code that is identical to the Undergraduate Type Aid above except that it is used with graduate student reporting. A **G** means the aid program on that record is a grant; an **S** means the program is a scholarship; an **L** designates a loan program; and an **E** represents some form of employment.
RAC - Race Table

The Race Table is used to define a relationship between an ethnic code and the five ethnic names used on the Office of Civil Rights Report and the Health Professions Report (SAMR75 and SAMR73 respectively).

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab. The screen is dynamically painted to allow entry of only the appropriate elements for each Identifier or type of report. This assists the user in populating the necessary information for each report.

The (RAC) Race Table, Summary Tab
The (RAC) Race Table, Detail Tab

Racial/Ethnic Name: Hispanic

Number (BIO.SETHNIC): 1
RNG - Range Table

Range Tables are used by all programs except SAMR75 to specify numeric intervals of discrete classes for reporting. Numeric intervals involve breaking down a total income or award range into meaningful subunits. For example, if we defined income intervals on a total range of $0 - $20,000 as follows:

- $0 - $1,000
- $1,001 - $5,000
- $5,001 - $10,000
- $10,001 - $15,000
- $15,001 - $20,000

and are reporting amount of aid and number of aid recipients, a program using those range definitions would accumulate the amount of aid, and the number of aid recipients for each of the five income intervals. The same procedures would apply when defining award intervals, rather than the income intervals above.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab. The screen is dynamically painted to allow entry of only the appropriate elements for each Identifier or type of report. This assists the user in populating the necessary information for each report.

To clarify terminology, we define a Range Interval via low and high boundaries, such as $5,001 -$10,000. The example shows five Range Intervals. In this module, each Range Interval is specified by one Range Record.

To completely cover the span of values covered by an income or award variable, several Range Intervals must be used. This collection of Range Intervals is known as a Range Set. The C Range definition is illustrated in the screens below.

There are two types of Range Tables used in Reporting and Analysis. One is for Federal reports (SAMR71 and SAMR73), where what items will be reported and what parameters shown are predetermined. In that case the Range Table controls the reports level of detail by defining income or award intervals. Such tables come with the system but may be modified by the user to meet local conditions or changing regulations.
The other Range Table type is for institutional reports (SAMR72), where both the items to report and the parameters specifying the report format are chosen by the user.

The (RNG) Range Table, Summary Tab
The (RNG) Range Table, Detail Tab

<table>
<thead>
<tr>
<th>Range Name:</th>
<th>Table C</th>
<th>Long Name:</th>
<th>White/Caucasion Stud</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range Code:</td>
<td>1</td>
<td>Value 1:</td>
<td>100</td>
</tr>
<tr>
<td>Range Seq:</td>
<td>01</td>
<td>Value 2:</td>
<td>199</td>
</tr>
<tr>
<td>Cycle:</td>
<td>D-Range Rec pro</td>
<td>Value 3:</td>
<td>299</td>
</tr>
<tr>
<td>Default:</td>
<td></td>
<td>Value 4:</td>
<td>399</td>
</tr>
<tr>
<td>Number:</td>
<td></td>
<td>Value 5:</td>
<td>499</td>
</tr>
</tbody>
</table>
Rules Container

The Rules Container gives the user the ability to interactively create the rules (Groups) or selection criteria for processing groups of students. A Group record describes the group of aid applicants to be selected. Select records provide the criteria aid applicants must meet to be classified into that Group.

In the Tracking Module, for example, the criteria identifies which Track the student should be assigned, which further assigns documents that are required for that student. Additionally, it identifies which correspondence, labels and reports are to be generated. Each Group Record is followed by one or more Select Records, which specify the eligibility criteria for that group. For each applicant meeting the criteria, a Key Record is produced which contains the Student Name, Student Identifier and a code for the Type of letter. These Key records are used to generate correspondence with the letter writing program, SAMT25. The Type of Letter code is assigned to all members of a group and is used by SAMT25 to identify which letter from the LET table is to be sent to all of the members in that group.

Several batch programs within the ProSAM system use the Group Records. These programs are (but not limited to):

- SAMU20 – Generalized Selection Program
- SAMU21 – System File Merge Program
- SAMU41 – General Assignment/Selection Program
- SAMP30x - Automatic Packaging
- CASA41 - Audit

Note: SAMU41 is used for Budgeting, Packaging, Notification, Disbursement, Diagnostics (optional ProSAM module) and the ISIR Pre-Processor (optional ProSAM module). Please review the SAMU41 documentation in its entirety, for a complete description on how to set up Groups for the various uses. An additional resource is the TADD (Table Audit and Data Dictionary) documentation, which may have some additional nuances that are not directly specified in this document.

To add new Rules, select the New Icon from the toolbar and the Create Business Rule window will be displayed and ready for data entry. Select Continue to continue with adding the new rule or Cancel to abort the addition. To add to or change existing Rules, either select the Rule from the Summary tab then select the Detail tab or simply double click on the desired Rule on the Summary tab.

Once you select Continue you will be taken to the Edit Rules window for addition of the Select/Assign criteria for this particular group (explained later in this section).
Once you are satisfied with the information, Select the Done button (or Cancel if you wish to abort this action) and you will be taken back to the Detail tab.

The Rules Container, Summary Tab
The Rules Container, Detail Tab
The Create Business Rule Window is used to “initially” create a new business rule. This window is only available when creating a new business rule. Additionally, it is possible to “copy” an existing Rule Member and create a NEW Rule Member.

Select the rule to copy by highlighting it, and then select the copy icon just to the left of the Search box. The Copy Rules From window is displayed, update the appropriate information such as check New or Existing, Member name, select the Items to include by highlighting and pressing the arrow to the right key etc. Once completed press the OK button and the New Rules will be added and will be accessible from the Summary tab.

The Member value can be any 6 character alphanumeric value, which describes the group being created. The Title would be the description or name of the group such as; General Budget Assignment.

The value for Item is a 2 byte numeric value that would be where the group is to be displayed or positioned within multiple groups for a single Rule. Follow Up (used with Notification only) is a drop down selection of whether or not the letter is a follow up letter or not. The Letter code (used with Notification only) is the 3 character Letter code from the LET table (the LET table is not presently supported in the Workbench software). The drop down selection for Continue (Continuation Indicator) is whether or not the Group is part of Continuation logic, thus, selection in this group continues on to the next group.

Again once you select the Continue button you will be taken to the Edit Rules window for addition of the Select/Assign criteria for this particular group. Once you are satisfied with the information, Select the Done button (or Cancel if you wish to abort this action) and you will be taken back to the Detail tab.
The Rules Container, Create Business Rule Window
The Rules Container, Copy Rules From Window
To create additional Rule Groups, while on the Detail tab from the group just added, select the New Icon. Notice the Parent Group information is grayed out because the Rule Group you are adding is a part of that Parent group. Enter the information for the new Rule Group and select Continue or Cancel. Again you will be taken to the Edit Rules window for addition of the Select/Assign criteria for this particular Rule Group. Once you are satisfied with the information, Select the Continue button (or Cancel if you wish to abort this action) and you will be taken back to the Detail tab.
Here again Copy functionality is helpful if you want to copy existing Rules to another existing Rule within the same Member. This is done from the Detail tab (after having selected the Member) by highlighting the desired Selects, Assigns etc from a particular Item and select the copy icon in the upper right corner, then select by highlighting the Item you wish to copy to and select the paste icon in the upper right corner. The Highlighted Selects will be copied to the specified location. The Edit Rules window will be displayed with the newly pasted Selects for modification to meet the needs of the new group then press Apply and Done. The Detail screen will now display the new modifications.
The Rules Container, Detail Tab Showing Item/s Pasted (Results of Copy)
Workbench Manual

The **Edit Rules** Window is used to Add or edit existing rules. To Add a Select, Assign, Award etc. statement if one had not already been added, from the Detail tab, double click on the Rule. A blank Edit Rules window will be displayed for you to choose the type of Rule to add. Note: the buttons in the middle of the Edit Rules window. The Insert button inserts a new Select or Assign below the highlighted area within the item. The Delete button will delete an item. Copy will copy a specific Select or Assign to another location (placed beneath the selected placement). Apply will apply the modifications. The Done button will save the modifications and return to the Detail tab. The Cancel button will cancel the modifications and return to the Detail tab.

The Rules Container, Function Buttons

Once you’ve selected the type of Rule to add, the display will refresh with the applicable elements to assist with completing the criteria for that type of Rule.

A **Selection** statement is specific criteria that an aid applicant must have in order to be “selected” or included in the group.

In the “Select example below the value for **Special Relationship** is optional and is a drop down selection.
The **DED Name** must match exactly the data element that you wish to use in the selection criteria. Note: the data element “ESTAT” (Evaluation Status) is preceded by a File Identifier of “S” (a listing of the File Identifiers follows the screen below).

The **Relationship** describes the action that is performed in analyzing the data element versus the value, the drop down listing provides the available values. When you are finished adding or updating the information, select the Apply button or Done button. If you wish to abort the changes or addition, select the Cancel button.

Note: the use of Exclusion Groups are created to exclude or remove students from being further analyzed in the Group criteria. This reduces the amount of processing time especially for complex groups. These types of groups are typically the first Select type of Rule that is added to a Group. The Select example below is an exclusion. When creating an Exclusion group, the “Name” of the Item number MUST be ***EXCLUSION*** so that the programs know how to process this item.
File Identifiers specify the file of origin. If omitted the file used by the previous data element will be selected. If the data element is not in the previous file used, the SAMU41 control option ORDER determines which files are checked and the order in which they are checked when searching for a data element. The following listing should assist in choosing what file identifier to use:

<table>
<thead>
<tr>
<th>File Identifier</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>p</strong></td>
<td>Actual Disbursement</td>
</tr>
<tr>
<td><strong>W</strong></td>
<td>Award</td>
</tr>
<tr>
<td><strong>B</strong></td>
<td>Biographic</td>
</tr>
<tr>
<td><strong>7</strong></td>
<td>BIO Supplement</td>
</tr>
<tr>
<td><strong>D</strong></td>
<td>Disbursement</td>
</tr>
<tr>
<td><strong>DI</strong></td>
<td>Diagnostic</td>
</tr>
<tr>
<td><strong>1</strong></td>
<td>Electronic Origination</td>
</tr>
<tr>
<td><strong>A</strong></td>
<td>Common Record Data</td>
</tr>
<tr>
<td><strong>H</strong></td>
<td>History Award</td>
</tr>
<tr>
<td><strong>IA</strong></td>
<td>ISIR (A) Sequential File</td>
</tr>
<tr>
<td><strong>IB</strong></td>
<td>ISIR (B) Sequential File</td>
</tr>
<tr>
<td><strong>IC</strong></td>
<td>ISIR (C) Sequential File</td>
</tr>
<tr>
<td><strong>PS</strong></td>
<td>Person File</td>
</tr>
<tr>
<td><strong>PM</strong></td>
<td>Prom Note Manifest File</td>
</tr>
<tr>
<td><strong>S</strong></td>
<td>Student Aid Master</td>
</tr>
<tr>
<td><strong>L</strong></td>
<td>Student Need Analysis, Base</td>
</tr>
<tr>
<td><strong>F</strong></td>
<td>Student Need Analysis, Federal</td>
</tr>
<tr>
<td><strong>J</strong></td>
<td>Student Need Analysis, Parent</td>
</tr>
<tr>
<td><strong>R</strong></td>
<td>Student Need Analysis, Student</td>
</tr>
<tr>
<td><strong>6</strong></td>
<td>Supplemental Term Summary</td>
</tr>
<tr>
<td><strong>T</strong></td>
<td>Track</td>
</tr>
<tr>
<td><strong>U</strong></td>
<td>Track 2 (Special Documents)</td>
</tr>
</tbody>
</table>
Assign rules allows the user to assign a specified value to a particular data element. As with Select rules the first character of the data element name may be the File Identifier (described above). For Assign rules the Relationship value will always be “to”. Special Value Designators are used to do additional processing. They are positioned between the File Identifier and the data element name. Again, please review the SAMU41 documentation for a complete discussion on setting up Rules.

Special Value Designator
- @ = Assign value to all fields
- & = Assign value to first blank field
- * = Value1 in the ASSN statement is a data element

In the example below, the user is assigning a budget of 696.00 to the first blank field (indicated by the & Special Value Designator being used). When combined with the Select rule, they are selecting students who have a value of A in the User11 data element on the SAM file and assigning a new budget.

The Rules Container, Edit Rules, Assign
**Award Rules** are used to identify the aid programs to be considered within each Packaging Group. The records both define the minimum/maximum award amount to be used during packaging and define the priority sequence in which awards are to be considered (e.g., grant aid considered before work, before loans). Combined with each Award record, are any number of When records (discussed later in this document), providing the eligibility requirements for the award. Please review the SAMP30 documentation for a complete overview on the Packaging process.

**Aid ID** corresponds to the codes that are defined in the Aid Program Definition module (PGM file) in ProSAM. This allows SAMP30 to obtain additional data for packaging from the PGM file for each award. This field is required and cannot be blank.

**PType** (Payment Type) supports packaging by payment type. The PGM file must include a record for each Aid Program Identifier and Payment Type having the Packaging Type field set to “Y”.

**Short Description** provides a shortened name for the financial aid program. This description is used only on the report of packaging results output from SAMP30.

**Award Basis** is used to enter the basis under which the award is to be made. This basis is used in conjunction with the Policy Basis on the Policy record (described in the next section). The combination of Award Basis and Policy Basis influence the amount of aid a student may be awarded (if he/she meets the eligibility criteria). The relationship between Policy Basis and Award Basis is outlined below.

- **Policy Basis = NB (Need Based)**
  - Award Basis = EN -- Award amount not limited by unmet need
  - NB -- Award amount limited by unmet need
  - WQ -- Award amount limited by unmet need

- **Policy Basis = WQ (When Qualified)**
  - Award Basis = EN -- Award amount not limited by unmet need
  - NB -- Award amount limited by unmet need
  - WQ -- Award amount not limited by unmet need

**Please note:** When awarding an unsubsidized loan with Policy Basis=NB and Award Basis=NB, the program calculates the unsubsidized loan equal to Budget minus total aid.

**Please note:** When award amount is limited by unmet need, the student will not be overawarded. The award offer (in this case) is the largest possible award amount that will not exceed need, will not exceed policy limits, and is within the Award Maximum and Award Minimum amounts (defined below).
Since entitlements (Award Basis = EN) will always be awarded whether or not the student has remaining need and reduce the student’s need by the amount of the entitlement award, they should be the first awards packaged for each student. This is done by sequencing the Award Records with Award Basis of EN as the first Award Records in each Packaging Group. Since unsubsidized loans use the Total Aid Awarded to calculate the loan amount, unsubsidized loans should be the last awards packaged for each student.

The **Special Processing** value provides a shortened mnemonic label for the Aid Program and identified financial aid programs requiring special processing. The values having special meaning in the system are: NOTE, BEOG, PELL, PRKL, FVET, SEOG, PLUS, FCWS, SUB and USUB. The value of NOTE is used to print an award in the Automatic Packaging results but to exclude the award from the update data generated as output from packaging (the SAMP10 transactions and MRG file data). USUB and PLUS are used in conjunction with INCNEED=N in the PGM File to award unsubsidized loans. (The other values cause the system to perform special processing that is described in the Data Element Manipulation section of the SAMP30 documentation).

**Please note:** We recommend that our clients use the **SUB** and **USUB** values when awarding Subsidized and Unsubsidized Direct/Stafford Student Loans.

**Please note:** Institutions that wish to award HEAL (Health Educational Assistance Loan) loans, should use the value USUB. (For more information on HEAL processing see section SPECIAL PROCESSING FEATURES – HEAL in the SAMP30 documentation).

**Please note:** A value of “NOTE” in the Group will only exist within the processing of the SAMP30C run. The award is put on the report, but no SAMP10 transactions are created, thus the award is never really in the package. However the award is counted against totals and award amounts and limits within the run of SAMP30C.

The **Minimum** field provides the minimum allowable aid offered under the aid program. If the award offer must be smaller than the minimum to meet policy or unmet need requirements, the award offer is not made. That is, the student’s financial aid package will not include an award with an offer amount less than this award minimum amount.

**Maximum** field includes the maximum award offer made to a student from the aid program. Under entitlement programs (Award Basis = EN), the student will be awarded this Maximum award amount irrespective of need. When an award is made on the basis of financial need, the maximum offer is made to the student unless this amount would overaward the student or violate a policy constraint such as maximum allowable aid by type (e.g., gift, loan or work). Note: neither the Minimum nor Maximum fields are required. If the amounts are not provided here or are set to zero, the amounts are obtained from the PGM file using the Minimum Award (AWDMIN) and Maximum Award (AWDMAX) data elements.
Acceptance Indicator provides a facility to have the award automatically accepted when the offer is made. This is true for some outside resources (e.g., entitlements) where the student does not formally accept the award as a condition for payment. If this field is coded with a value of Accept Package, the award will be automatically accepted when updated through SAMP10. If the field is blank, no automatic acceptance is done, requiring the award to be accepted through the Notification Module.

Schedule Type permits an override to the default Schedule Type of the PGM record. When Automatic Packaging outputs transaction data (for input to SAMP10) the Schedule Type from this record is moved to the transaction Schedule Type field. Thus, Automatic Packaging can control an award’s payment schedule (e.g., fall only, spring only, semester or quarter) through use of Schedule Type. If the field is left blank the value is obtained from the PGM file.

Revision Reason is used to include a Revision Reason with the award as it is updated through SAMP10. This might be used, for example, to assign all automatically packaged awards with a revision reason of 99, while manually revised awards might have another code. If left blank, no revision reason is used.

The Data Element field implements the table look-up feature (see example below). The table provides award levels for a scholarship and/or grant. The scholarship’s award amount may vary with GPA (i.e., CUMGPA data element) and the grant’s award amount varies with family contribution (i.e., EFC data element).

<table>
<thead>
<tr>
<th>President Fund (a Scholarship)</th>
<th>Kiwanis Fund (a Grant)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low GPA</td>
<td>High GPA</td>
</tr>
<tr>
<td>Award Amt</td>
<td>Award Amt</td>
</tr>
<tr>
<td>2.00  2.49</td>
<td>$7000249 $4,000</td>
</tr>
<tr>
<td>2.50  2.79</td>
<td>800  250  500  3,000</td>
</tr>
<tr>
<td>2.80  2.99</td>
<td>1,000  501  900  3,500</td>
</tr>
<tr>
<td>3.00  3.49</td>
<td>1,400  901  1200  2,000</td>
</tr>
<tr>
<td>3.50  3.99</td>
<td>1,800  1200  4500  1,000</td>
</tr>
<tr>
<td>4.00  4.00</td>
<td>4,800</td>
</tr>
</tbody>
</table>

When a Table-Award Record’s Award Data Element field contains a valid data element, the software performs a table look-up to set the Award Maximum Amount (this is another field on the Table-Award Record). If the look-up fails because the data element value (e.g., GPA) is not within one of the Low/High ranges, no award is made. If no look-up table was defined for an Award Data Element, an error message is printed and the award is not made.

In the example above, a student having a Cumulative GPA of 3.88 would be awarded up to $1,800 of scholarship (CUMGPA is greater than the low value of 3.50 and less than the high GPA value of 3.99). The actual award amount may be less if the aid program (i.e., the scholarship) is need-based and remaining need is less than $1,800. Similarly, with an EFC of $750 the table look-up provides an award maximum of $3,000 for the grant.
To implement this table look-up, two separate records must be coordinated. The Table-Award Record contains the data element name used for the table look-up (i.e., CUMGPA for the scholarship award described above). The Table-Table Record described below, contains each of the low/high data element intervals and their corresponding award amount.

**Aggregate Maximum # of Terms** defines the number of terms the student can receive this financial aid award. When renewal of an award for an academic year (3 quarters or 2 semesters) would exceed this limit, the award is reduced in proportion to the remaining eligibility. For example, a student with one term of remaining eligibility in a school with quarters as academic terms would have one third of the maximum award amount packaged (one-half for a semester school). If this field is left blank, the default is to apply no restrictions to the terms of eligibility.

**Aggregate Maximum Lifetime Amount** provides a limit on the total aid the student can receive for all years in the program. This limit can be used for any award program, although it is most appropriate for loans where institutional policy limits the total debt a student is allowed to accumulate. For the Perkins Loan (PRKL) Program, where limits are defined by regulation, this field is not used because SAMP30 uses federal limitations on cumulative loan amounts as a Special Processing Feature. If the field is left blank, no cumulative limits are applied.

**Historical Aid ID 1, 2 and 3** provides 3 different aid program identifiers used in prior years to identify this award program. These codes are necessary only when different from the Award Aid Program Identifier described above. Award History Programs can also be masked using * similar to masking used for AIDYR. Masking provides more flexibility in locating all History Award data, e.g., SE** locates all awards starting with SE.
The Rules Container, Edit Rules, Award
The **Policy record** defines institutional policy for award processing within each Packaging Group.

The **Packaging Type** dropdown select provides the option to choose one of the four different types of packaging that can be performed under this Packaging Group.

**Policy Basis** provides an overall basis for assigning awards and is interpreted in conjunction with the Award Basis (see the Award Record above). Again, a dropdown select is provided with the available values to choose from.

**Maximum Aid** is used to set a ceiling on the total aid package available to each student. Under all processing modes, the total of all aid included in the award package will not be allowed to exceed the amount provided in this field. The default for this field is zero.

**Tolerance** Amount provides a tolerance limit for need-based awarding. Need-based awards are packaged for each student so long as there is remaining need. When remaining need (also called unmet need) is less than or equal to this limit, no more need-based awards are included in the student’s award package. Awards are considered need-based when the Award Basis (see the Award Record above) is NB. A Tolerance, for example, of $100 would mean once the student has had sufficient aid packaged to reduce unmet need to $100 or less, no additional need-based aid would be considered for the student’s award package. This value is defaulted to zero.

**Percentage** provides another tolerance limit for awarding need-based aid until remaining need is reduced below a certain level. This percentage is multiplied by the student’s budget, gross financial need, or net financial need to derive an amount used the same as Tolerance described above. When remaining need is less than this amount, no more need-based awards are included in the award package. This value also defaults to zero. Need-based awards are not made when remaining need is less than either the absolute limit defined by Tolerance or the relative limit defined by the Percentage. This is true in use of the Incremental, Repackaging and Modify Packaging types where the objective of processing is to reduce remaining need. The reverse is true when the Decremental Packaging type is used. Here the objective is to reduce an overaward. For Decremental packaging, the amount of overaward is reduced until either of these limits is reached.
Gift Aid (Equity type of S or G), Work Aid (Equity type of W), Loan Aid (Equity type of L) – Maximum Amount provides an absolute limit for each type of award. This parameter works similar to Maximum Aid described above. Once the total amount of aid for each, in a student’s package is equal to or exceeds this limit, no additional aid is awarded. As an award amount is being determined for need-based programs the maximum award amount would not be awarded if it would exceed this limit; instead an attempt is made to determine the largest possible award without exceeding the limit.

Gift Aid, Work Aid, & Loan Aid - Maximum Percent, sets the ceiling on the percentage for aid that can be assigned to a student during packaging. The percentage is multiplied by Student Budget, Gross Financial Need, or Net Financial need to compute a student’s policy limit by aid type. For example; with a Gift percentage of 50%, the total amount of gift aid in the student’s award package will not exceed 50% of the Student Budget. Note: A combination of Gift Percentage, Loan Percentage and Work Percentage does not need to equal 100%. Entitlement awards are not controlled by these percentage distributions and are made irrespective of these policy ceilings. Each award assigned during Packaging is classified into Gift, Loan or Work using the Equity Type data element from the Aid Program Definition module in ProSAM for each Aid Identifier. The default for each of these fields is 100%.

Gift Aid, Work Aid, & Loan Aid – Maximum # of Awards limits the number of awards a student receives to a number less than or equal to this policy limit. The value for this field must be less than 100 and the default is zero.
When Records define eligibility criteria for each award program. Each Award record in the Rules file can have none or one or more When records following it, with each specifying a requirement for award eligibility. The When records defining eligibility criteria for an Award record must follow the Award record (as shown in the example below). To have the award included in the student’s award package, a student must meet all the requirements defined on “all” When records.

Special Relationship is an optional drop down selection, which further describes the relationship needed to meet the criteria.

DED Name defines a data element in the MRG File or the Need Analysis file. See the SAMP30 documentation for a complete listing of elements than can be used in When records.
The **Relationship** drop down values provide the appropriate values that can be selected which define a logical comparison that is to be made between the MRG or SNB data element value and the value(s) provided on this record.

**Value(s) 1-6** entered must be either alphanumeric or numeric, depending on the MRG file data element with which the comparison is being made. If the data element is numeric, the data must be entered in the Value 1 field in numeric form.

**Please Note:** It is important to note blanks are a valid entry for any alphanumeric data element in the Value1 field (or in the Value2 field for the Set and Not Member Relationship). However, blanks in the MRG File data element being used for the comparison will cause the condition not to be met if the data element is numeric.

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The **Rules Container, Edit Rules, When**
**Insert Rules** are used with the Audit Module (optional module). An audit record is created when the conditions are met. In the example below, an audit record would be created when the Data Element TOTOFFR (Total Offer amount) changes.
**Load Rules** is used to load an audit “group”. In this example, the Audit program CASA41 will load the records generated by the $ADAWD group (see Insert above). The value in Field must coincide with the Member name of the Group where the Inserts are located (see Insert above) and the Control Option Member in the CASA41 job.

Note: The Audit File Analysis Program (CASA41) extracts Audit Records from the Audit File and creates Summary and Baby Audit Records for specific data elements selected by the user. (Please review this documentation prior to creating Audit groups).

The Rules Container, Edit Rules, Load
Sort Rules are used by SAMU20 and SAMU41 to determine what data to place in the Key record sort areas. Sometimes Name, SSN or some other field value would be placed in those areas so a sort may be done on the Key file before using it as input to the next processing step. For example, this would allow you to do a Packaging report sorted by Name order (or by SSN/SID2 for sites using a local university ID in the SID field).

The Rules Container, Edit Rules, Sort
SCH – Table
The Schedule Table provides parameters used to distribute award offers from a single annual amount into payment periods. Each payment period can be an academic term (e.g., quarter or semester) or a calendar month.

The Schedule Table is used by the Disbursement and Notification Modules. In the Notification Module, the Schedule Table is primarily used for automatic award scheduling performed by SAMN20.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The Schedule Type field is used to define what type of schedule the institution is using, e.g., semesters, quarters, etc. The Commitment Schedule code must correspond to the commitment schedule value used when creating the Commitment Table Records. The Type Term is user-defined and must correspond to the TYPETRM specified in the MAP Table Record. The Schedule Method is used to tell SAMN20 how to schedule the total offered for an aid program over the 12 payment periods. Additional information is available for schedule method in the documentation for SAMN20. The Percentages fields, 1 through 12, establish what percentage of payment is to be paid out during each of these payment periods.

The user must be consistent with the four fields, Schedule Type, Commitment Schedule, Type Term and Schedule Method, by using the same values wherever these fields are referenced in different table records.
The (SCH) Schedule Table, Summary Tab
The (SCH) Schedule Table, Detail Tab
SDT – Schedule Dates Table

The Schedule Date Records are used by SAMD10 to update the Student Award Record with the Begin and End dates from the term being updated.

SAMP35x uses these date records to update the disbursement dates for each Anticipated Disbursement Record it creates.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The Type Term field should match the Type Term entered on the MAP Record. The next six fields correspond to the six enrollment fields. For each one of the enrollment periods applicable to the Type Term entered, the begin and end dates must be entered. The format for entering the date is either CCYYMMDD or MM/DD/CCYY.

Optional fields to enter are Disbursement Date 1 & 2 and 30-day delay date.

*Please note: these three date fields are required for SAMP35x to function properly.*
The (SDT) Schedule Dates Table, Summary Tab
The (SDT) Schedule Dates Table, Detail Tab

<table>
<thead>
<tr>
<th></th>
<th>Begin Dates</th>
<th>End Dates</th>
<th>Dist Dates 1</th>
<th>Dist Dates 2</th>
<th>Delay Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4:</td>
<td>01/20/2008</td>
<td>05/14/2008</td>
<td>01/20/2008</td>
<td>03/01/2008</td>
<td>04/01/2008</td>
</tr>
<tr>
<td>5:</td>
<td>06/14/2008</td>
<td>08/06/2008</td>
<td>07/19/2008</td>
<td></td>
<td>07/29/2008</td>
</tr>
<tr>
<td>6:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TBL - Table Table

Table records are used in conjunction with the Table Award records, used by SAMP30 in the Packaging Module, to allow a more flexible strategy of minimum and maximum award limits. This table implements the table look-up feature. The Table record allows a user to award a varying dollar amount based on a specific data element value. For example:

01 NASSETS  000000  10000  800
02 NASSETS  10001  20000  600

The above Table record can be used to award a specific aid program and offer $800 if the student’s Net Assets are between $0 and $10,000 and award $600 if the student’s Net Assets are between $10,001 and $20,000.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.
The (TBL) Table, Summary Tab
The Data Element Name must be a valid name of a numeric field. The Award Amount is the dollar amount to award a student “if” the data element values fall between the high and low values indicated on the screen.

NOTE: The Data Element Name must be added to the Award line of the Packaging Group for the Table Record to be considered. (Please refer to the Rules Container section of this document for more information regarding the Award line).
TRK - Tracks Table

The Track Table defines each track and identifies the Standard document requirements for each track. For purposes of processing in the Tracking Module, a Track refers both to a class of students and to the documents and actions which are required to make each applicant complete. An applicant is tracked at two separate levels. The first, Application Complete, monitors the requirements for completion of the aid application. This must be completed before the student receives an aid offer. The second, File Complete, monitors the requirements necessary after the student has received an award offer and before a payment can be made.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The Track Identifier field is where the 6-character track code is entered. The Description field describes the track code. The Track Type fields (1-15) represent each of the Standard Documents. The options for these fields will denote whether a particular document is required to be Application Complete (A), File Complete (F) or is Not Required (N).
The (TRK) Tracks Table, Summary Tab
The (TRK) Tracks Table, Detail Tab
TRN - Translation Table

The Translation Table is used to translate Student Information System (SIS) coded fields to the appropriate ProSAM field value. Basically, the value in SIS will be mapped to the corresponding value in ProSAM for a specific field.

The summary tab displays existing information in the table. To select records for changes, highlight the desired record and then select the Detail tab. To delete a record, highlight the desired record and select the Delete Icon from the toolbar.

To add records select the New Icon from the toolbar and a blank Detail tab will be displayed and ready for data entry. The detail tab is used to add records and change existing records. When you have added a new item and saved, it will remain in insert mode and remain on the detail tab to allow you to perform mass entries. To leave insert mode, click on the summary tab.

The Translation Table has a limited number of data elements, which are valid and will have any effect during processing. The valid data elements are shown below.

- SETHNIC (BIO)
- SMARITL (BIO)
- PACDLVL (TRK, SAM)
- SHSETPY (SAM)
- ADMSTAT (TRK, SAM)
- VETSTAT (BIO)
- SCITZN (BIO)
- VISA (BIO)
The (TRN) Translation Table, Summary Tab
The (TRN) Translation Table, Detail Tab