CAMS Enterprise

Financial Aid Setup

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Abstract

Before Financial Aid can be packaged and awarded to students, it is necessary to complete a few setup tasks. These tasks will be covered in detail in this document and include the following:

- Populating the Award Reference List
- Defining Academic Years
- Defining Financial Aid Years
- Defining Financial Aid Calendar
- Defining Budget Costs
- Establishing Award Sequences
- Setting Up Lenders
- Custom ISIR Import

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Overview of Financial Aid Setup

Before Financial Aid can be packaged and awarded to students, it is necessary to complete several setup tasks. These tasks are listed below in the recommended order of completion. Each task has detailed step-by-step instructions on the following pages.

1. CAMS Enterprise uses the Amounts Billed for Qualified Tuition and Related Expenses method of reporting. The 1098T forms will have box 2 filled in.

Note: *If you use the Payments Received for Qualified Tuition and Related Expenses method you must change your reporting method to Amounts Billed for Qualified Tuition and Related Expenses. You will need to submit a written submission to the IRS at least three months before the due date of the returns for the year of the change.*

2. Enter all awards, (regardless of whether they are loans, grants, or scholarships) into the TransDoc Reference table located in **CAMS Manager >Lookup Table Options >Table Maintenance >Reference Tables**. Each award should be a separate TransDoc that includes the award name and description, account and opposing account numbers, etc., and if applicable, 1098T related.
3. Use the Financial Aid Lookup Tables graphic to guide you in the population of Financial Aid lookup tables located in **CAMS Manager >Lookup Table Options >Table Maintenance**. You will want to be sure these values are supplied prior to any other setup tasks.
4. Populate the Award Reference table in **Financial Aid >Setup >Award Reference**. Once all awards have been added, be sure to click **Generate**. This generates SSI files, which cause the awards to display in the Award Type drop-down list, which is necessary to assign awards.
5. Define Academic Years in **Financial Aid > Setup >Yearly Setup > Acad Year**. Academic years are the foundation for the financial aid calendar.
6. Define Financial Aid Years for each academic year in **Financial Aid >Setup >Yearly Setup >FinAid Year**. You may set up as many financial aid years for each academic year as desired.
7. Define the Distribution Calendar for each financial aid year in **Financial Aid >Setup >Yearly Setup >FinAid Year**. You may set up as many distribution calendars for each financial aid year as desired.
8. Define Budget Costs for a particular financial aid year in **Financial Aid >Setup >Yearly Setup >Budget Costs**. These must be set up so that a **Total Cost of Attendance** can be determined for students.
9. Optional - Establish Award Sequences in **Financial Aid >Setup >Award Sequences.** This step is optional but it is necessary to have if you plan to apply groups of awards to students.

Note: *If desired, you may define Award Properties specifically for particular financial aid years in **Financial Aid >Setup >Yearly Setup >Award Properties**. Award properties include the lifetime and yearly maximums, as well as the load amount (Full-time, Half-Time, etc.). Unless otherwise noted, this information is used for reference only, and does not affect functionality within CAMS.*

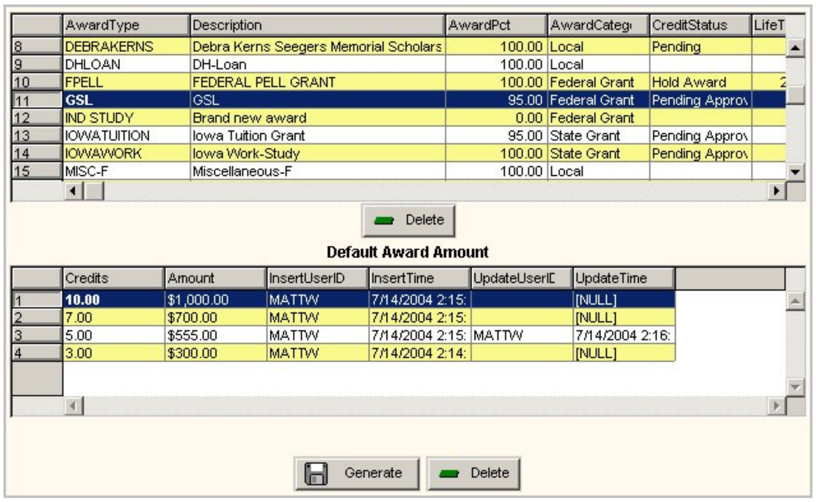
Financial Aid Setup

Populating Award Reference List

Before any other financial aid setup tasks are completed, it is imperative that you populate the Award Reference List. Awards can be restricted by Department or by GPA Group. You can also define a default amount for an award which typically is awarded in the same amount each time. However, before you can populate this list, you must ensure that the coordinating awards exist in the TransDoc reference table in the CAMS Manager Module. Any fields populated in the TransDoc table will automatically be populated in the corresponding fields in the Award Reference Entry window. These become the default values that display in the student award ledger. You may overwrite the default values in the student award ledger if desired.

Step-by-Step: Populate the Award Reference Table

1. From **CAMS Enterprise Home** page, click **Financial Aid >Setup >Award Reference**. The **Award Reference List** window opens.



	AwardType	Description	AwardPct	AwardCateg	CreditStatus	LifeT
8	DEBRAKERNS	Debra Kerns Seegers Memorial Scholars	100.00	Local	Pending	
9	DHLOAN	DH-Loan	100.00	Local		
10	FPELL	FEDERAL PELL GRANT	100.00	Federal Grant	Hold Award	2
11	GSL	GSL	95.00	Federal Grant	Pending Approv	
12	IND STUDY	Brand new award	0.00	Federal Grant		
13	IOWATUITION	Iowa Tuition Grant	95.00	State Grant	Pending Approv	
14	IOWAWORK	Iowa Work-Study	100.00	State Grant	Pending Approv	
15	MISC-F	Miscellaneous-F	100.00	Local		

Delete

Default Award Amount

	Credits	Amount	InsertUserID	InsertTime	UpdateUserID	UpdateTime
1	10.00	$1,000.00	MATTW	7/14/2004 2:15:		[NULL]
2	7.00	$700.00	MATTW	7/14/2004 2:15:		[NULL]
3	5.00	$555.00	MATTW	7/14/2004 2:15:	MATTW	7/14/2004 2:16:
4	3.00	$300.00	MATTW	7/14/2004 2:14:		[NULL]

Generate Delete

Figure 1: Award Reference window

2. Right-click on the data grid to add an award, or double-click to modify. The **Award Reference Entry** window displays.

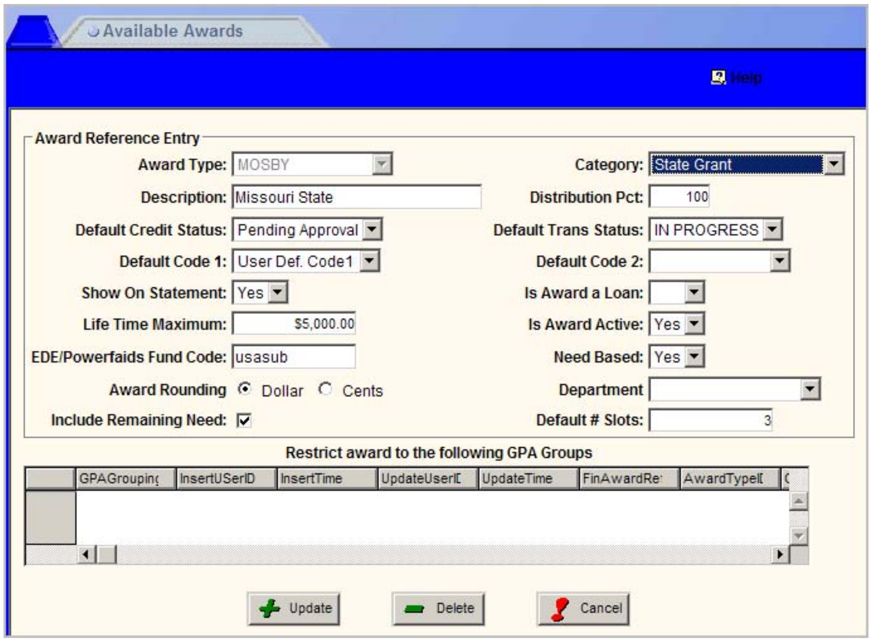


Figure 2: Award Reference Entry window

3. Select the **Award Type** from the drop-down list. This list displays award types from the TransDoc reference table in CAMS Manager.
4. Select the award **Category** (FINAwardCategory) from the drop-down list.
5. If not automatically populated from the TransDoc table, enter a **Description** for the award. This description displays on the student billing statements.
6. Enter the **Distribution Pct** (percent). Typically this is 100% but if the award is a loan there might be a finance fee and this amount could be whatever the difference is, so that the finance fee is deducted from the total award amount.
7. Select the **Default Credit Status** (FIN AID Credit Status) and the **Default Trans Status** (FINAID Status) from the respective drop-down lists if your institution requires this information.
8. Select **User Defined** codes (FINAID Code 1 & 2), if any, from the drop-down lists.
9. Select **Yes** or **No** in the following fields:
   - **Show on Statement** – This must be set to Yes in order for the award to display on student billing statements. If marked to No, the award would not display on a student bill statement even if **Show Pending Aid** is selected as billing statement criteria.
   - **Is Award a Loan** – This differentiates awards that are loans and may have finance fees deducted from the total amount distributed.
   - **Is Award Active** – This must be set to Yes in order for the award to display for selection when applying awards to the students.
   - **Need Based** – If the award is set to Yes, then it will be included in remaining need calculations.
10. Enter the **Life Time Maximum** amount. This amount is for reference only and does not drive additional functionality.

11. Enter the **EDE/PowerFAIDS Fund Code** if this award can be imported through EDE (Electronic Data Exchange) or PowerFAIDS. This must be present in order for the awards to be imported into CAMS as Fund Code is used to match awards between the two systems.
12. Select **Dollars** or **Cents** for the **Award Rounding** preference. Awards will be rounded to the nearest Dollar or Cent depending on this selection.
13. If there is a certain number of students who can receive the award enter that number in the **Default # Slots** field.
14. Enter a **Department**, if required.

Note: *This field is used for departmental security. If a department is entered in this field then only those users who belong to this department will be allowed to add or modify this award. If this field is left blank then anyone with permissions to award financial aid will be able to apply this award to a student.*

15. Select **Include Remaining Need** if this award is non-need based but should be included in calculating the student's remaining need.
16. If you wish to restrict awards by **GPA Group**, complete the steps on the next page.
17. Enter notes as desired. The **Note** field is used to remark about the specific award and can be pulled into various reports from Financial Aid BYOR and Award Letters. Such uses might include award renewal requirements (i.e. GPA, Student Load, College level, etc.).
18. Click **Add** to save this award to the list, or **Cancel** to exit without saving.

Restrict Awards to GPA Groups

You may restrict certain awards to a particular GPA group. For example, students in an undergraduate program may not be eligible for awards reserved for Masters program students. If the GPA Grouping field in the student's Status record (Registration >Academic >Status) for the awarded term is blank then the all awards will be available for awarding, even if the award is limited to certain GPA Groups. If a GPA Grouping value is selected in the Status record, then the student will only be eligible to receive awards which have that same GPA Grouping value defined in the Award Reference table.

Step-By-Step: Assign A GPA Group To An Award

1. From the **Award Reference Entry** window, right-click in the **Restrict Award to the following GPA Groups** data grid. A blank GPA restriction window opens.
2. Select the **GPA Group** that is allowed to receive the award.
3. Click **Add** to select the GPA Group and return to the data grid or **Cancel** to exit without saving.

Note: *More than one GPA Group can be assigned to receive the award.*

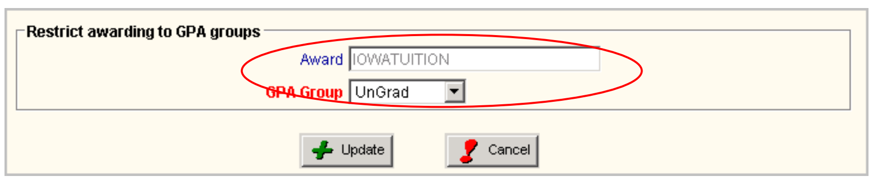


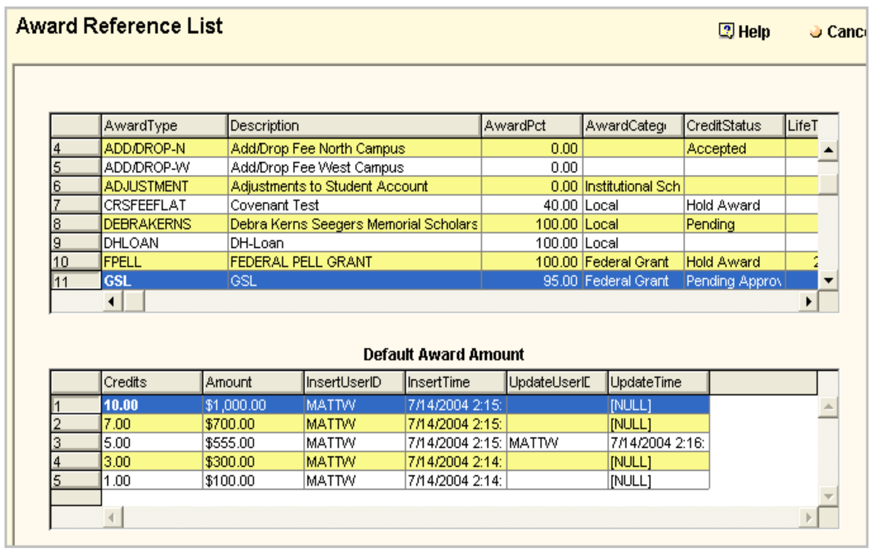
Figure 3: Award GPA Group

Default Award Amounts

Award amounts may be based on the number of credits a student is registered for. CAMS Enterprise can set default amounts based on the credits. Amounts are determined by the closest credit that is equal to or below the student's actual credits. For example, there are default award amounts for credits of 7 and 10. If the student has registered for 9 credits the award will be equal to the 7 credit amount. If the **Auto Adjust Financial Awards** field is checked in the **CAMS Manager >Configuration >Financial Aid** tab, awards will be automatically adjusted based on the amounts defined if the student's load changes within the **Maximum number of days to adjust from term start date**, which is also set in the Financial Aid configuration tab. Awards with no default award amount will not be automatically adjusted.

Step-By-Step: Add Default Award Amounts

1. Highlight the award in the **Award Reference List** then right click in the **Default Award Amount** data grid.



Award Reference List

Help

Canc

	AwardType	Description	AwardPct	AwardCateg	CreditStatus	LifeT
4	ADD/DROP-N	Add/Drop Fee North Campus	0.00		Accepted	
5	ADD/DROP-W	Add/Drop Fee West Campus	0.00			
6	ADJUSTMENT	Adjustments to Student Account	0.00	Institutional Sch		
7	CRSFEEFLAT	Covenant Test	40.00	Local	Hold Award	
8	DEBRAKERNS	Debra Kerns Seegers Memorial Scholars	100.00	Local	Pending	
9	DHLOAN	DH-Loan	100.00	Local		
10	FPELL	FEDERAL PELL GRANT	100.00	Federal Grant	Hold Award	2
11	GSL	GSL	95.00	Federal Grant	Pending Approv	

Default Award Amount

	Credits	Amount	InsertUserID	InsertTime	UpdateUserID	UpdateTime
1	10.00	$1,000.00	MATTW	7/14/2004 2:15:		[NULL]
2	7.00	$700.00	MATTW	7/14/2004 2:15:		[NULL]
3	5.00	$555.00	MATTW	7/14/2004 2:15:	MATTW	7/14/2004 2:16:
4	3.00	$300.00	MATTW	7/14/2004 2:14:		[NULL]
5	1.00	$100.00	MATTW	7/14/2004 2:14:		[NULL]

Figure 4: Default Award Amount Data Grid

2. The **Default Award Amounts** window opens. The highlighted award is displayed.
3. Enter the **Term** for which the default amount will be effective.
4. Enter the number of **Credits** and the **Amount** that should be awarded for that number of credits.
5. Click **Update** to save the Award Amount or **Cancel** to return to the Award Reference Entry window without saving.
6. Repeat until all default award amounts for the specified term have been applied to the award.

Generate Award SSI Files

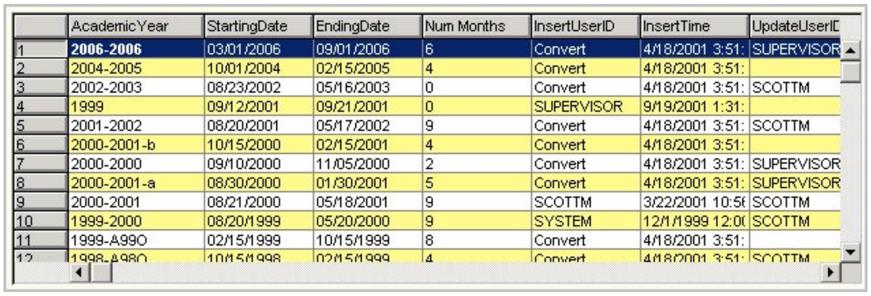
Click **Generate** to generate SSI files (which allows awards to display in the Award Type drop-down list) when you add awards to the award reference table or modify the name of an award.

Defining Academic Years

Now that the Award Reference List is populated, it is necessary to define academic years. Once academic years are defined, you can then define financial aid years within each academic year.

Step-by-Step: Define the Academic Year

1. From **CAMS Enterprise Home** page, click **Financial Aid >Setup >Yearly Setup** to open the Financial Aid Yearly Setup window. The **Acad Year** tab displays.



	AcademicYear	StartingDate	EndingDate	Num Months	InsertUserID	InsertTime	UpdateUserID
1	2006-2006	03/01/2006	09/01/2006	6	Convert	4/18/2001 3:51:	SUPERVISOR
2	2004-2005	10/01/2004	02/15/2005	4	Convert	4/18/2001 3:51:	
3	2002-2003	08/23/2002	05/16/2003	0	Convert	4/18/2001 3:51:	SCOTTM
4	1999	09/12/2001	09/21/2001	0	SUPERVISOR	9/19/2001 1:31:	
5	2001-2002	08/20/2001	05/17/2002	9	Convert	4/18/2001 3:51:	SCOTTM
6	2000-2001-b	10/15/2000	02/15/2001	4	Convert	4/18/2001 3:51:	
7	2000-2000	09/10/2000	11/05/2000	2	Convert	4/18/2001 3:51:	SUPERVISOR
8	2000-2001-a	08/30/2000	01/30/2001	5	Convert	4/18/2001 3:51:	SUPERVISOR
9	2000-2001	08/21/2000	05/18/2001	9	SCOTTM	3/22/2001 10:5(	SCOTTM
10	1999-2000	08/20/1999	05/20/2000	9	SYSTEM	12/1/1999 12:0(	SCOTTM
11	1999-A99O	02/15/1999	10/15/1999	8	Convert	4/18/2001 3:51:	
12	1998-A98O	10/15/1998	02/15/1999	4	Convert	4/18/2001 3:51:	SCOTTM

Figure 5: Academic Year Tab

2. Right-click on the data grid to add a new academic year. The **Academic Year Detail** window displays.

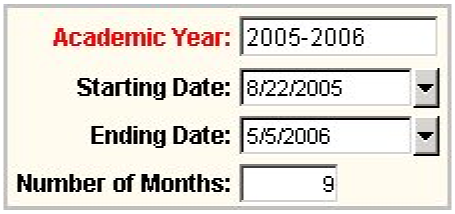


Figure 6: Academic Year Detail window

3. Enter the appropriate Academic Year span, then select from the drop-down calendars or type the Starting Date and Ending Date. The Number of Months populates automatically based on the dates selected.
4. Click **Add** to save this information, or **Cancel** to exit without saving.

Note: *Academic years may only be deleted (highlight the appropriate year, and then click* ***Delete****) if they have NOT been used in a status record.*

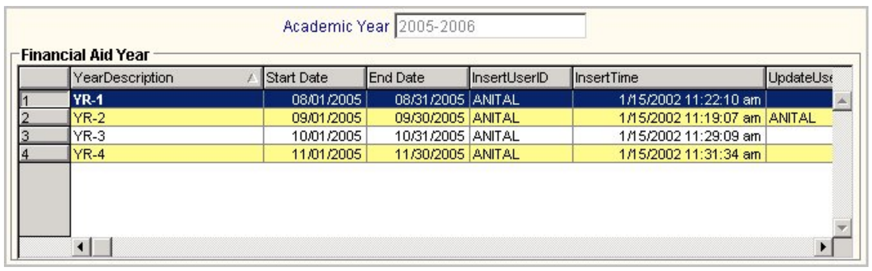
Defining Financial Aid Years

You may establish as many financial aid years for each academic year as needed. For example, you could have one financial aid year with two distribution dates for awards, once for fall, and once for spring. If you had students on a trimester schedule, as well as students on a semester schedule, you would have one of the financial aid years with awards distributed across two terms, and the other financial aid year with awards distributed across three terms.

You will apply the appropriate financial aid year to the student in financial aid status or when packaging awards. Once you have financial aid years created, you can then set up the award distribution calendar.

Step-by-Step: Define the Financial Aid Year

1. From the **Financial Aid Yearly Setup** window, highlight the appropriate academic year, then click the **FinAid** Year tab.



Academic Year 2005-2006

Financial Aid Year

	YearDescription	Start Date	End Date	InsertUserID	InsertTime	UpdateUse
1	YR-1	08/01/2005	08/31/2005	ANITAL	1/15/2002 11:22:10 am	
2	YR-2	09/01/2005	09/30/2005	ANITAL	1/15/2002 11:19:07 am	ANITAL
3	YR-3	10/01/2005	10/31/2005	ANITAL	1/15/2002 11:29:09 am	
4	YR-4	11/01/2005	11/30/2005	ANITAL	1/15/2002 11:31:34 am	

Figure 7: Financial Aid Year Tab

2. Right-click on the Financial Aid Year data grid to add a new financial aid year. The Financial Aid Detail window displays.

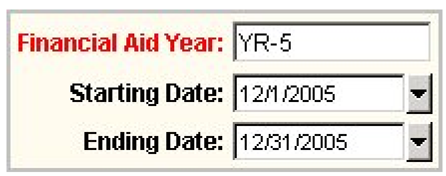


Figure 8: Financial Aid Detail window

3. Enter the appropriate Financial Aid Year description, then select from the drop-down calendars or type the Starting Date and Ending Date.
4. Click **Add** to save this information, or **Cancel** to exit without saving.

Note: *This procedure may be repeated as many times necessary for each academic year.*

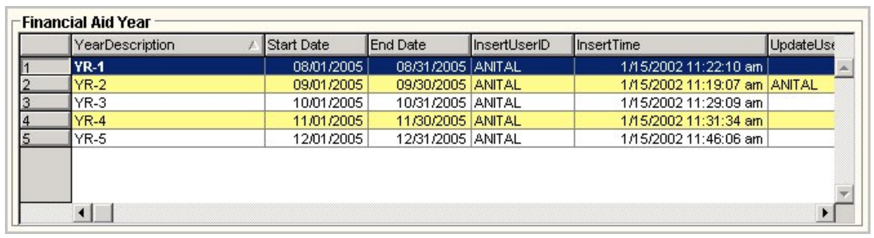
*Financial Aid years may only be deleted (highlight the appropriate year, and then click **Delete**) if they have NOT been used in a status record.*

Defining Financial Aid Calendar

Once the financial aid years are defined, you must set up the distribution schedule for each financial aid year. For example, a Pell Grant might be distributed over two terms, 50% each term.

Step-by-Step: Define the Financial Aid Calendar

1. From the FinAid Year tab, highlight the appropriate financial aid year.



Financial Aid Year

	YearDescription	Start Date	End Date	InsertUserID	InsertTime	UpdateUse
1	YR-1	08/01/2005	08/31/2005	ANITAL	1/15/2002 11:22:10 am	
2	YR-2	09/01/2005	09/30/2005	ANITAL	1/15/2002 11:19:07 am	ANITAL
3	YR-3	10/01/2005	10/31/2005	ANITAL	1/15/2002 11:29:09 am	
4	YR-4	11/01/2005	11/30/2005	ANITAL	1/15/2002 11:31:34 am	
5	YR-5	12/01/2005	12/31/2005	ANITAL	1/15/2002 11:46:06 am	

Figure 9: Financial Aid Year Tab

2. Right-click on the **Financial Aid Calendar** data grid. **The Financial Aid Calendar Detail** window displays.

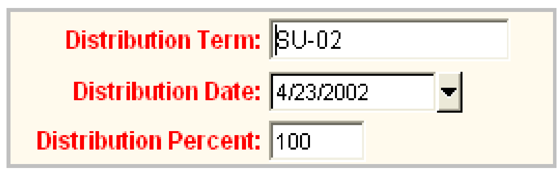


Figure 10: Financial Aid Calendar Detail

3. Enter the **Distribution Term**.
4. Supply the **Distribution Date**. This entry serves as a default distribution date. This can be modified as necessary in the award detail screen or during transfer and distribution processes.
5. Enter the **Distribution Percent**. This percentage is used to calculate the award amount to be applied for the given term. For example, if your financial aid year is comprised of two terms (Fall and Spring), each with a distribution of 50%, then a $1000 award for the selected Financial Aid year would result in distribution of $500 for the Fall term and $500 for the Spring term.
6. Click **Add** to save information or **Cancel** to exit without saving.

Defining Budget Costs

After defining the Academic Calendar Year, and the Financial Aid year, you will define budget costs based on that Academic Calendar year and Financial Aid year. The budget costs help the Financial Aid department determine the amount of aid needed. These budget costs will reflect the average amount that a student in a specified program may be charged. Before budget costs can be applied, the CAMS Manager must set up the Direct Cost Types in the FINAID Direct Costs glossary table. And set up budget values in the FinBudgetLabels table. Values for this table may include, but are not limited to, tuition, housing, fees, books, loan fees, etc.

Step-by-Step: Define Budget Costs

1. From the Academic Year window, highlight the appropriate Academic Year, then click the FinAid Year tab. Highlight the appropriate financial aid year, then click the Budget Costs tab. The Yearly Costs window displays.

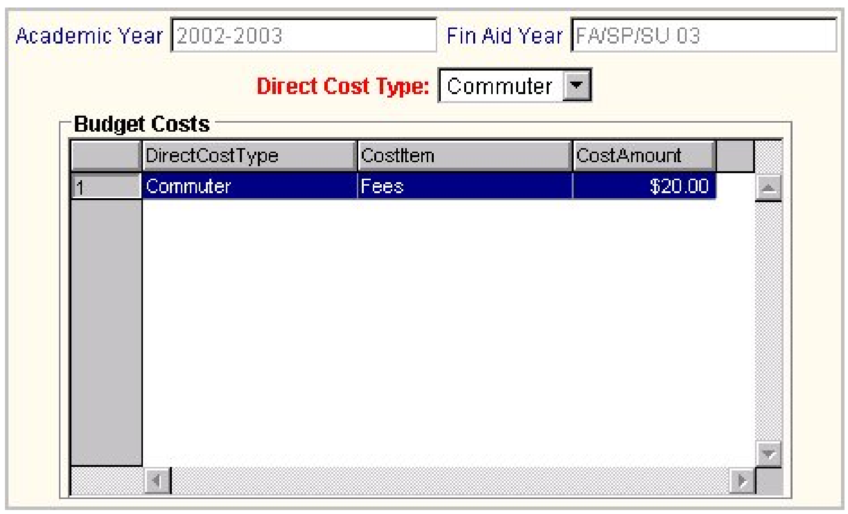


Figure 11: Yearly Cost window

2. The selected Academic Year and FinAid Year display. Select the appropriate Direct Cost Type (FINAID Direct Costs) from the drop-down list. Any budget costs associated with this direct cost type for the selected Academic and FinAid Years display in the list.
3. To add a budget cost, right-click in the data grid. The Budget Costs detail entry window displays.

Figure 12: Budget Cost Detail

4. Select the appropriate Cost Item (FIN Budget Labels) from the drop-down list, then enter the dollar amount of the item.
5. Click **OK** to save this information, or **Cancel** to exit without saving.

Defining Award Properties

Once the academic years, financial aid years, and the distribution schedules are set up, you may define Award Properties if desired. Awarding in Financial Aid is not dependent on setting up the properties. This information is used for reference only, and does not affect functionality within CAMS. The values entered in the Yearly Max field will be used in the Summary by Award Type report.

Step-by Step: Define Award Properties

1. From the Academic Year window, highlight the appropriate Academic Year, then click the FinAid Year tab. Highlight the appropriate financial aid year, and then click the Award Properties tab. The Award Property list displays. If no awards display in the data grid, click Load to load all awards listed in the Award Reference List.

2. Double-click the award for which you want to set properties.

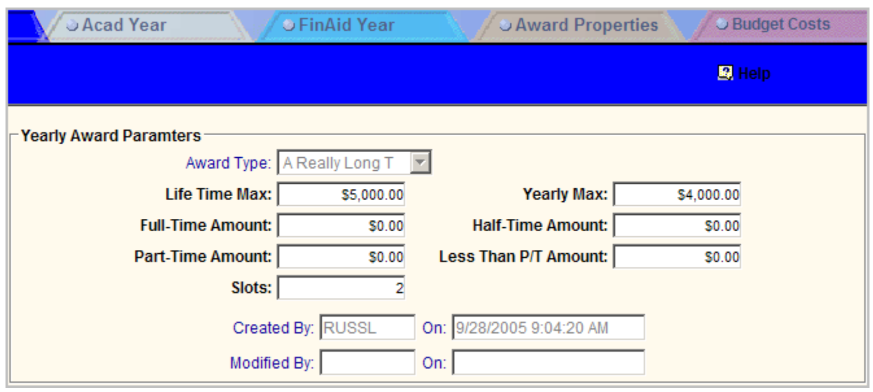


Figure 13: Award Properties Detail Entry

3. Enter the appropriate amounts for the Life Time Max, Yearly Max, Full-Time, Half-Time, Part-Time, Less Than P/T amounts, and Slots.

   - **Yearly Max** – If there is an amount in this field then an alert dialog box displays when manually assigning the award to a student and the total amount exceeds the Yearly Max. For example, if four students have been given an award that has a Yearly Max of $4000 and each receives $1000, then when the fifth student is given this award the alert will display that $4000 of the Yearly Max of $4000 has been reached. There will be an option to cancel the awarding or continue. This field is also used to populate the Yearly Max column in Financial Aid >Report >BYOR >Financial Aid Summary by Award Type report.

   - **Slots** – If there is a certain number of students who can receive the award enter that number here. When the number of slots has been exceeded an alert dialog box displays alerting the user that they are exceeding the number of slots. There will be an option to cancel the awarding or continue.

4. Click **Update** to save this information, or **Cancel** to exit without saving.

Setting up Budget Rules

Financial Aid Budget (Cost of Attendance) rules can be automatically assigned to a student during the EDE ISIR import or EDE Award Import. As part of the import process, CAMS will apply any of the rules that have been previously defined. The actual budgets are defined in Financial Aid Yearly Setup, Budget Costs. Prior to defining budget rules, it will be necessary to setup Academic and Financial Aid Years, and Direct Cost Type.

Step-by Step: Define Budget Rules

1. From the **CAMS Enterprise Home** page, open the **Budget Rules** window by clicking **Financial Aid >Setup >Budget Rules**.

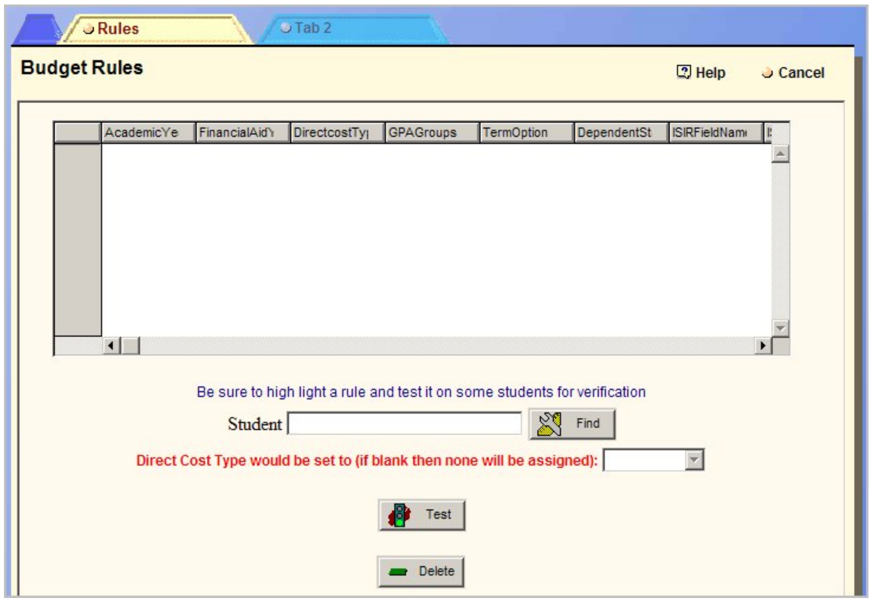


Figure 14: Budget Rules Window

2. Right click in the data grid to add a new rule (double click existing record to view details of entry).

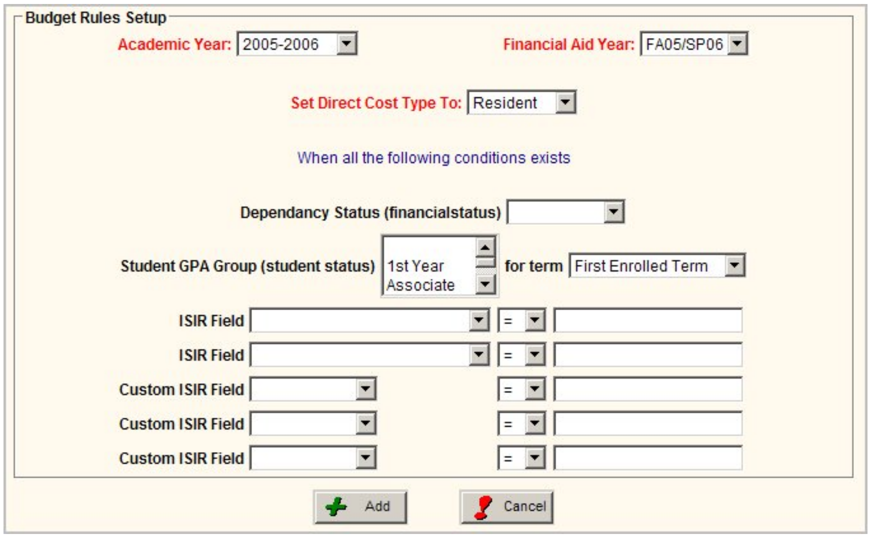


Figure 15: Budget Rules Setup Detail

3. Select **Academic Year** and a correlating **Financial Aid Year**.
4. Set the **Direct Cost Type**. This is the value that will be assigned to students meeting the defined criteria.
5. Continue by setting the conditions that apply to the group of students you wish to include
    a. Student GPA Group
    b. ISIR Fields
    c. Custom ISIR Fields
6. Click **Add** to save record.
7. Before leaving this window, you will need to test the rule that was just created. To do this, select the rule by highlighting it.

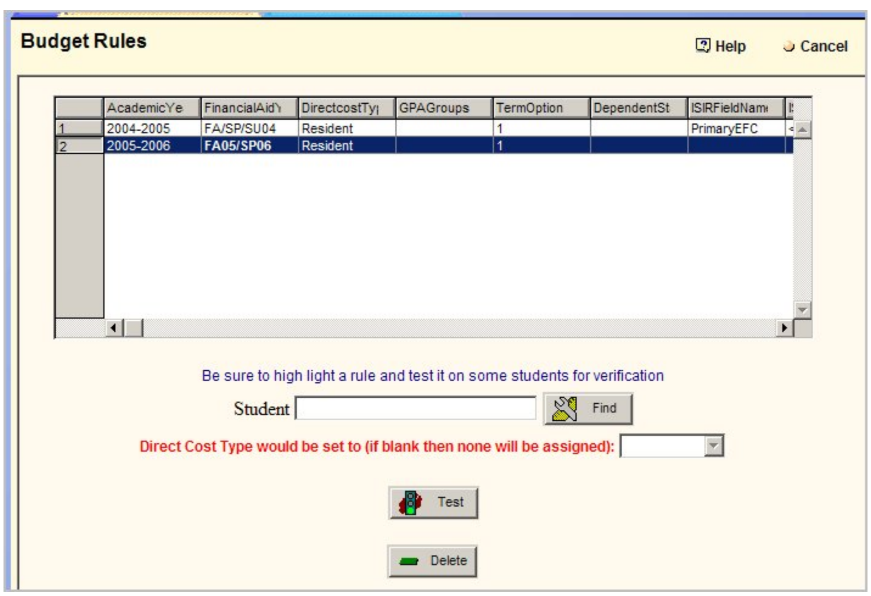


Figure 16: Budget Rules Test

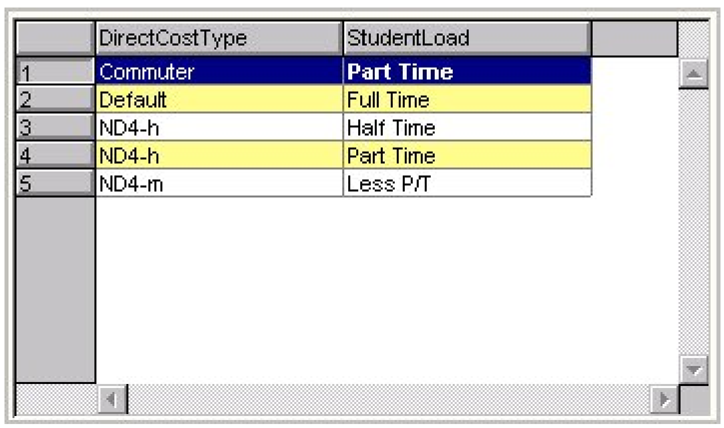
8. Find a student that fits the criteria defined in the rule.
9. Click **Test** to run the rule against the selected student record. If the rule is successful, a value will be inserted in the Direct Cost Type field (labeled in red). If the field is blank, the student did not meet the criteria. If incorrect syntax has been entered in the rule (typed in the free form fields), an error indicating such will be displayed.

Establishing Award Sequences

Award sequences are established to group awards that are commonly awarded together. For example, there may be two or three different state funded awards available to students residing within that state. During packaging of a student's awards, you can simply load an appropriate award sequence instead of adding each award individually. Setting up award sequences is a two-part process. First you must establish the sequence group, and then you will add awards to that group. **Note that all awards within the sequence are applied at the same time, not in any particular order.**

Step-by-Step: Establish Sequence Groups

1. From **CAMS Enterprise Home** page, click **Financial Aid >Setup >Award Sequences**. The Sequence Groups List window opens.



	DirectCostType	StudentLoad
1	Commuter	Part Time
2	Default	Full Time
3	ND4-h	Half Time
4	ND4-h	Part Time
5	ND4-m	Less P/T

Figure 17: Sequence Groups List window

2. Right-click in the data grid to open the Sequence Groups Entry window.

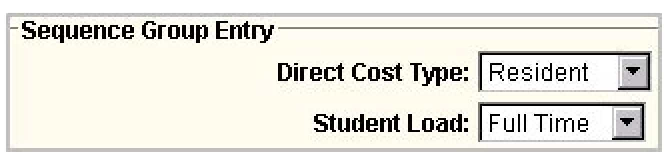


Figure 18: Sequence Groups Entry window

3. Select the appropriate direct cost type and coordinating student load from the drop-down lists.
4. Click **Add** to save this information, or **Cancel** to exit without saving.

Step-by-Step: Link Awards to Sequence Groups

1. From the Sequence Groups list window, highlight the appropriate Direct Cost Type and Student Load, then click the **Awards** tab. The Sequence Awards list window opens. Any awards linked to this direct cost display in the list.
2. To link another award, right-click in the data grid to open the entry window.

Figure 19: Selected Group

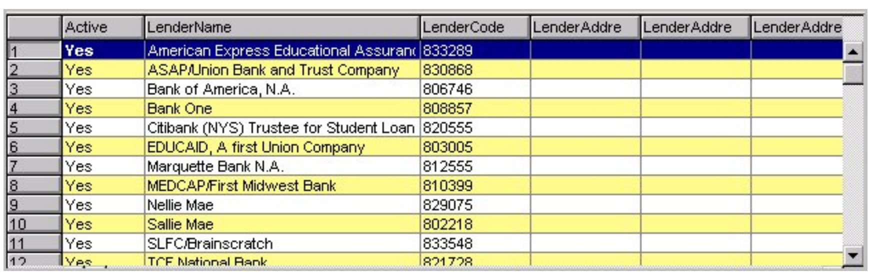
3. Select the appropriate Award Type from the drop-down list.
4. Select the appropriate Award Status and Credit Status from the drop down lists.
5. If your institution uses the user defined Code 1 and Code 2 fields, select those values.
6. Click **Add** to save this information or **Cancel** to exit without saving.

Setting Up Lenders

Your institution may wish to track the lenders providing Financial Aid funds.

Step-by-Step: Set Up Lenders

1. From **CAMS Enterprise Home** page, click **Financial Aid >Setup >Lenders.** The Financial Aid Lenders List window opens.



	Active	LenderName	LenderCode	LenderAddre	LenderAddre	LenderAddre
1	Yes	American Express Educational Assuranc	833289			
2	Yes	ASAP/Union Bank and Trust Company	830868			
3	Yes	Bank of America, N.A.	806746			
4	Yes	Bank One	808857			
5	Yes	Citibank (NYS) Trustee for Student Loan	820555			
6	Yes	EDUCAID, A first Union Company	803005			
7	Yes	Marquette Bank N.A.	812555			
8	Yes	MEDCAP/First Midwest Bank	810399			
9	Yes	Nellie Mae	829075			
10	Yes	Sallie Mae	802218			
11	Yes	SLFC/Brainscratch	833548			
12	Yes	TCF National Bank	821728			

Figure 20: Lenders window

2. Right-click in the data grid to open the Lender Information detail window.

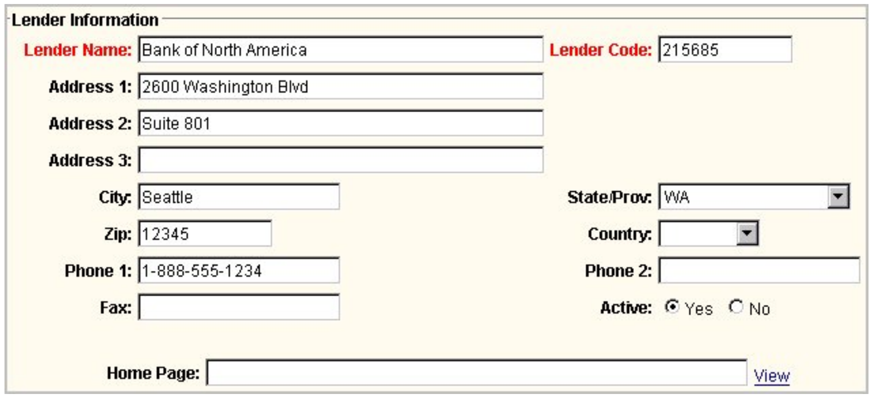


Figure 21: Lenders Detail window

3. Enter the Lender Name and Lender Code, then enter the appropriate address and phone number information. If the lender has a web page, enter that address into the Home Page field.
4. Press **Add** to save this information, or **Cancel** to exit without saving.

ISIR Import Setup

Importing ISIR data from EDE is detailed in the Financial Aid Processes document. By default CAMS Enterprise imports the first 205 positions of the import file. These equate to the fields on a student's financial aid maintenance screen, ISIR tab pages 1 and 2.

Note: *Custom ISIR Fields that are imported are displayed on the student's Maintenance screen, ISIR tab, in the lower data grid.*

Figure 22: Student's ISIR Page 1

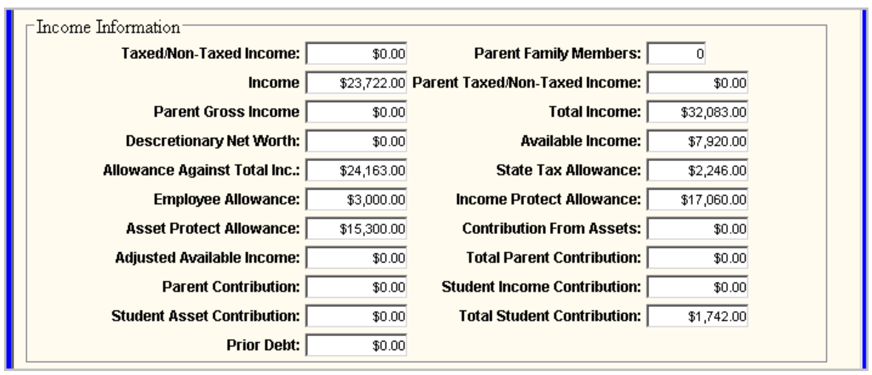


Figure 23: Student's ISIR Page 2

If additional fields need to be imported then any positions after 205 need to be designated in the Custom ISIR Import Setup form.

Note: *For fields to be listed after 205 you must export those fields from EDE so they are available in the file. Then you must determine where each field starts and ends in the file to be able to set up the Custom ISIR import.*

Step-By-Step: Import Custom ISIR Fields

1. From **CAMS Enterprise Home** page, click **Tools >Import >Financial Aid >ISIR Custom Setup**. The **Custom ISIR Import Setup** page displays.

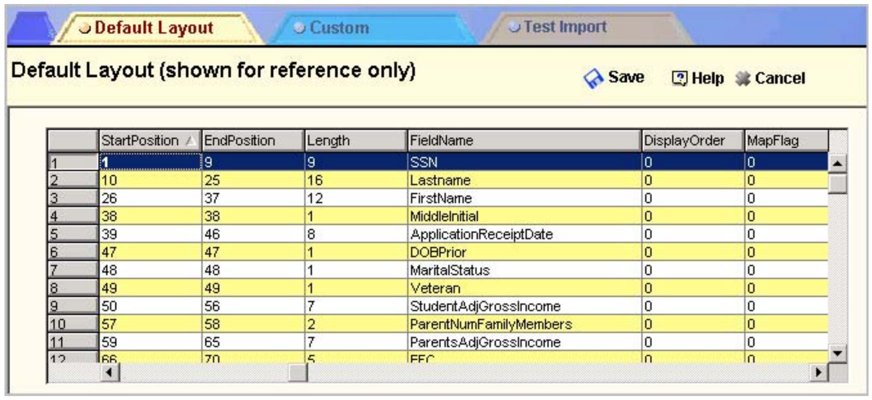


Figure 24: Custom ISIR Import Setup window

The first tab is the **Default Layout** tab and it is for reference only. It displays those fields that are imported using the first 205 positions. It does not display any data and cannot be modified.

2. Click the **Custom** tab. The **Custom Layout** window displays.

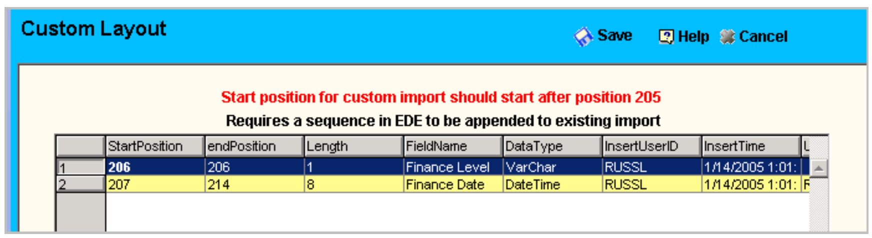


Figure 25: Custom ISIR Layout window

In **Figure 25**, above, the example displays two additional fields were exported from EDE. The first field is one character in length and the second field is eight characters in length.

3. Right click on the data grid to create a new import field or double click an existing entry to edit.

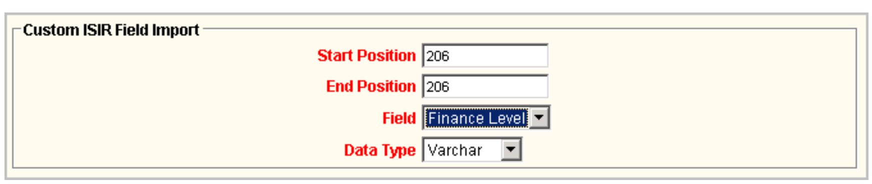


Figure 26: Custom ISIR Field Import window

4. Determine what position in the import file the desired field starts and what position it ends. The first custom imported field will start at position 206.
5. Enter the Start Position, which is where the field starts in the file.
6. Enter the End Position, which is where the field ends in the file.
7. Select the **Field** name. This field is populated from the **FinISIRFieldName** glossary table.

8. Select the **Data Type**. Available types are Date, Integer, Money, Real, and VarChar.
9. Click **Update** or **OK** to save the record or **Cancel** to exit without changes.
10. Add additional fields are necessary.

Step-By-Step: Test Custom ISIR Import

After the custom fields are created test the ISIR import.

1. Click the **Test Import** tab.

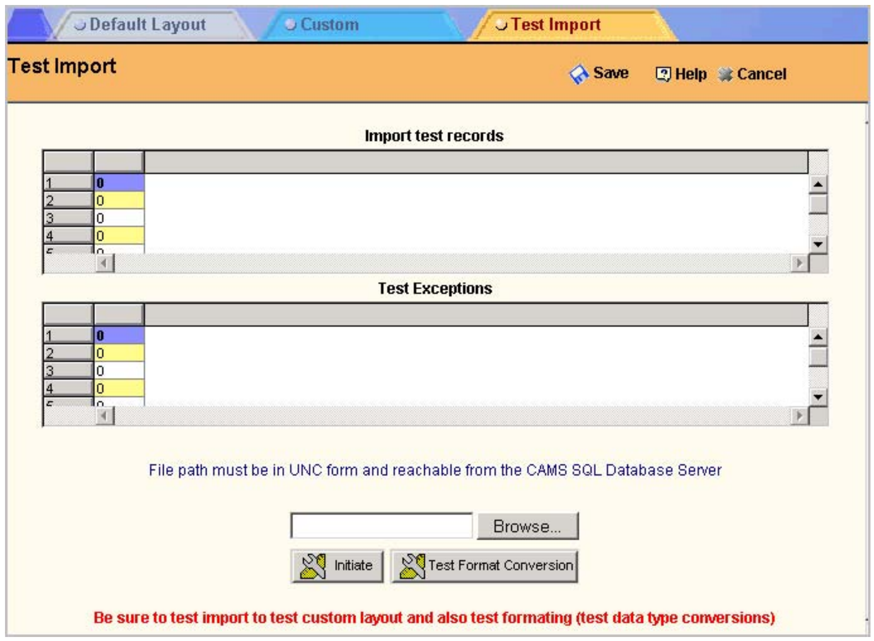


Figure 27: Test Import window

2. Browse to the EDE ISIR import file. You must use a UNC path. Click **Initiate**. This may take a couple of minutes.

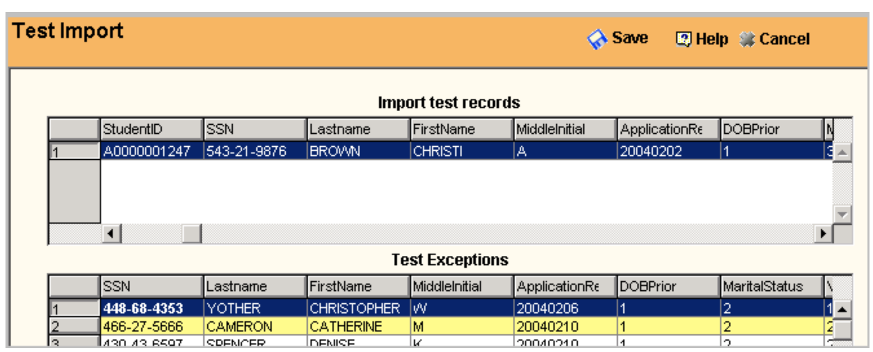


Figure 28: Test Import After Initiate

The top data grid displays those students who have match records in CAMS Enterprise and their ISIR data that will be imported.

3. To verify that the custom fields are importing correctly scroll to the right and check the last columns after the **EnrolledGradProf** field. These are the fields starting at position 206 in the data file.

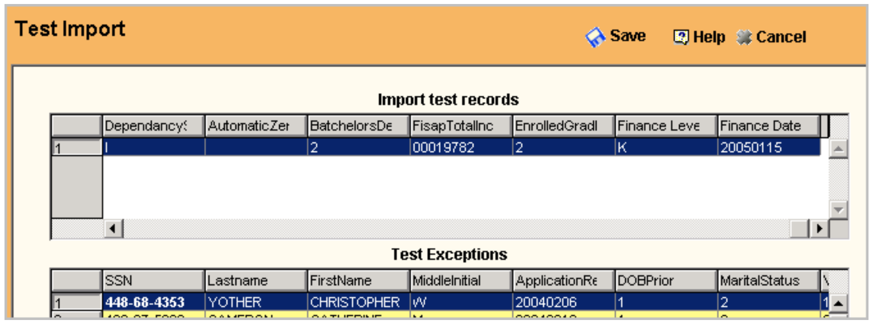


Figure 29: Custom ISIR fields

4. Ensure that the data looks correct. If it does not look correct check that the start and end positions of each field are correct and then retest.
5. Click **Test Format Conversion**. This will convert the fields to their selected data type to verify that they will import correctly.

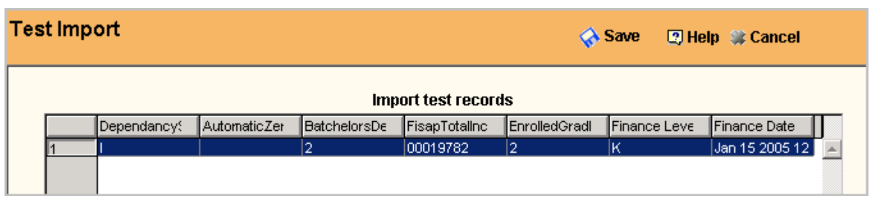


Figure 30: Test Format Conversion

In **Figure 30**, the Finance Date field has been converted to a date format after clicking Test Format Conversion. If the field had displayed the word **Null** that would mean that it was not in the correct format for the data type selected.

Additionally, fields with the word **Null** in them mean that there is nothing imported for that field.

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