



Financial Aid System

Award Letters in FAM

Center for Information Services
Supporting Washington State's community and Technical Colleges

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1 Overview

This document provides details about how to create award letters in FAM. By default the award letter only shows awards that have a status code of 1 (Offered) and 2 (Accepted).

For new award letters, a tracking code (ex: AW) is automatically created on the Student Tracking (FAM505) data screen, with the date due as provided when award letters are run and a date last notified of the date award letters are run. The date completed will be blank. The tracking status code will be NR for not required. If the student returns the signed award letter to the Financial Aid Office, the Financial Aid staff may enter the date completed on the Student Tracking Data (FAM505) screen.

The system determines that an award letter is revised by the presence of a tracking code (ex: AW). The system will then update the notified date column to the date the revised letter was run. In addition, the system will include a notation on the award letter that it is a revised letter, along with the date of the last letter. When the date updated (SAF_TRANS_DATE) in the student award detail (SAF_STD_AWD_DTL) table, displayed on the Student Award Data (FAM502) screen is greater than the date notified (SAF_TRANS_DATE) in the tracking detail (SAF_TRACK_DTL) table displayed on the Student Tracking Data (FAM505) screen, the system will print the 'REVISED' notation.

If you print award letters, revise them, and then reprint them on the same day, the system will not print the revised notification on the second letter printed on that date. When printing award letters using the array format, (Award Letter Array Format), the system will indicate revised awards with an 'R' notation after the revised award amount. When the student returns the revised award letter to the Financial Aid Office, the Financial Aid staff will may enter the date completed on the Student Tracking Data (FAM505) screen.

There are some restrictions that apply to this feature, namely:

- A tracking code (ex: AW) must already be created on the validation table (Validation Table Maintenance / Table Name: SAF_TRACK_CODE) for the award letter.
- The session for the tracking data must be the session start from the Student Financial Aid Data (FAM503) screen.
- The following entry must be made on the table master using Processing Table Maintenance:

System: SAF

Table ID: AGENCY

Value: SAF010-TRACK

Description: The two-character tracking code for the award letter.

- When the student does not have financial data on the Financial Aid Data (FAM503) screen, his/her letter is not tracked automatically unless you supply the starting session for tracking for the financial data with the award letter tracking code on the table master. The award letter will have the print designation NO FINANCIAL DATA FOR LAST SESSION SELECTED

The text of the award letter can be maintained using word processing software. The award letter template must be created in a rich text format (.rtf) file. You may have multiple files with multiple file names depending on the time of the year. The Award Letter screen prompts you to select an Award Message file and an Email Body file (if the Award Letter(s) are being sent via email).

Please note that the name and title of the financial aid officer that appears at the bottom of the award letter is determined by the information entered on the FAM Institution Code (FAM621) page.

2 Creating and Generating Award Letters

This section describes how to create and generate an award letter:

- Setting up commonly-used options in the Processing Table
- Creating the award letter template using Microsoft Word
- Generating the Award Letters

2.1 Commonly-used options in the Processing Table

Page Title: Processing Table Search

Navigation: Application Setup → Processing Config → Processing Table

The following FAM Processing Table options are commonly used by most colleges. Additional Processing Table options for modifying award letters can be found in Appendix A.

Posting Tracking Codes for Award Letters

In order for a tracking code to post on the Tracking Data page for the beginning year/session (for example, A891), make the following Processing Table change:

System: SAF

Table ID: AGENCY

Value: SAF010-TRACK

Description: The two-character tracking code for the award letter, for example, AW

Printing Award Details in Array Format instead of Grid Format

The Award Letter program defaults to printing the award section in grid format (see the sample report on page 16). You have the option to print the award section in array format. The array format option prints a maximum of four sessions horizontally with awards listed vertically. Amounts for additional sessions aggregate and are displayed in a column labeled “Other Awards.” Because of space limits, the award short name is used and the award code is eliminated. To use the array format instead of the grid format, use the following entry:

System: SAF

Table ID: AGENCY

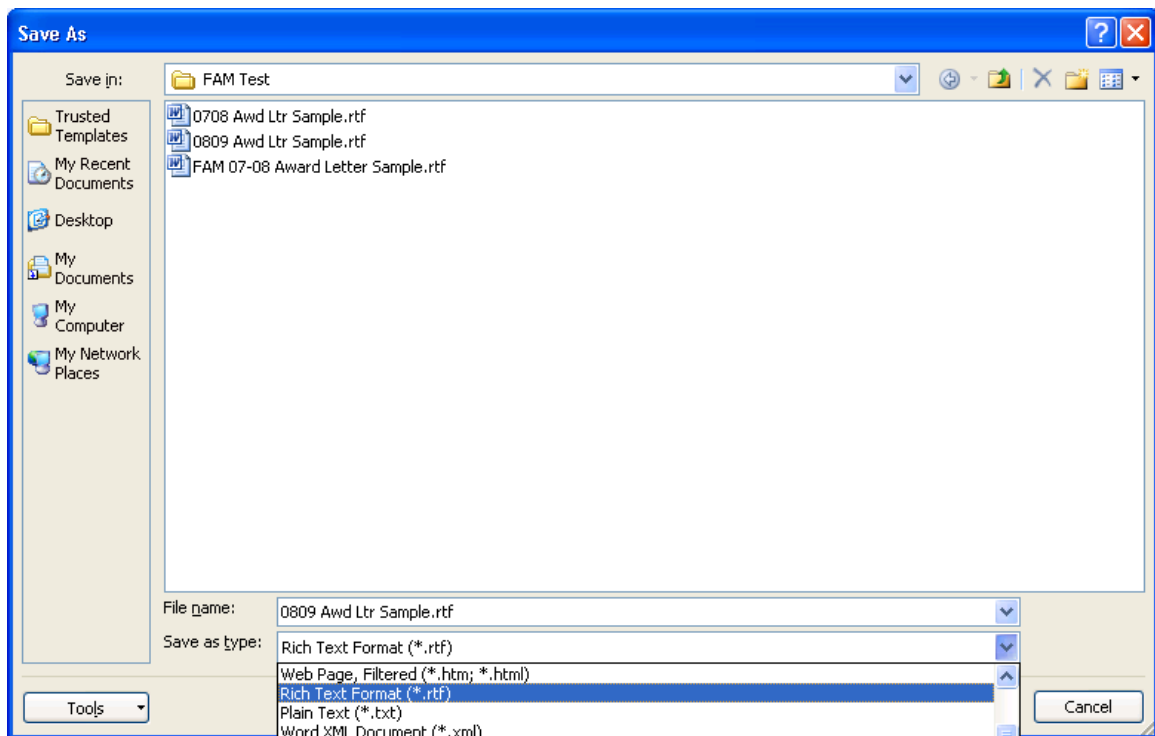
Value: SAF010-ARRAY

Description: PRINT AWARD LETTER IN ARRAY FORMAT

2.2 Creating an award letter template using Microsoft Word

The text of the award letter is maintained using word processing software, such as Microsoft Word. The award letter template must be created in a rich text format (.rtf) file:

1. Open Microsoft Word.
2. Type the body of the letter directly into Microsoft Word. (You also have the option of downloading existing award letters in the HP3000 using SM9949. See Appendix B for download instructions.)
3. Save your document in rich text format (.rtf):

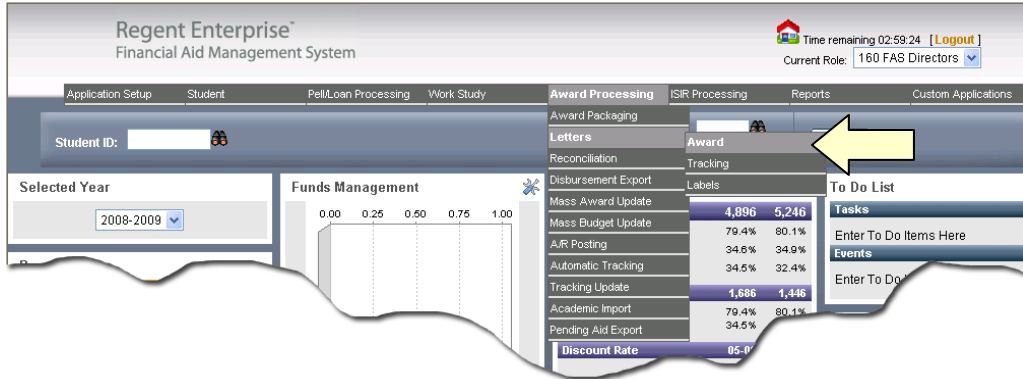


Note: The name and title of the financial aid officer that appears at the bottom of the award letter is determined by the information entered on the FAM Institution Code page (FAM621): Application Setup → New Year → Import Institution

2.3 Generating Award Letters

Page Title: Award Letters

Navigation: Award Processing → Letters → Award



Award Letters

Selection Criteria

Institution and Award Year: **HAPPY VALLEY COMMUNITY COLLEGE(01)-2008-09**

Students that dont have an award letter
 Students that have award(s) updated on or after their award letter was generated
 Students that had an award letter generated between [mm/dd/yyyy] and [mm/dd/yyyy]
 Students that have award(s) with activity date between [mm/dd/yyyy] and [mm/dd/yyyy]
 Students

[input]

Enter up to 20 student IDs, separated by commas or spaces

Award Template: [input]

Due Date for Signed Award Letter: [input] mm/dd/yyyy

Email Option

Send Via Email
Choose this option to send letters by email

From Name: [input]
From Address: [input]
Subject: [input]
Email Attachment Name: [input]
Email Body: [input]
Must be plain text only

Address Selection

Alternate Address Type: [input] Leave blank for master address
Alternate Address Code: [input] Leave blank for master address

Sort Options

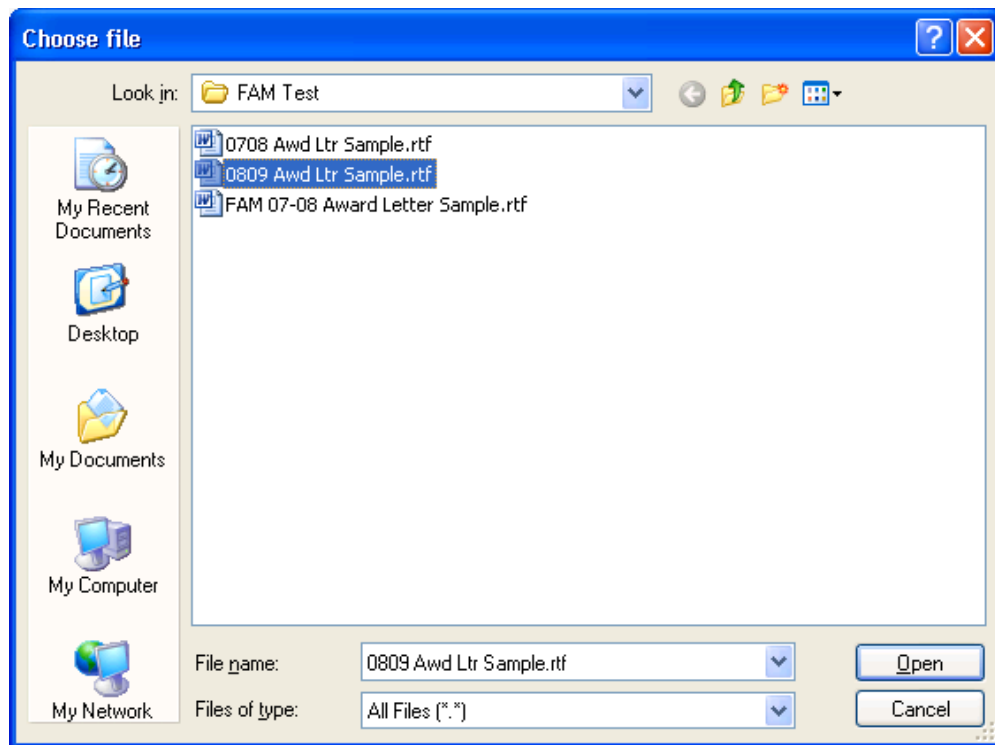
Last Name
 Zip Code
 Student ID

Complete these fields to send award letters via email.

Note: do not use any '/' (forward slashes) in any of these fields. The letter process will think that is part of a pathway and will give an error instead of producing letters..


Complete the following steps to generate award letters using the Award Letters page:

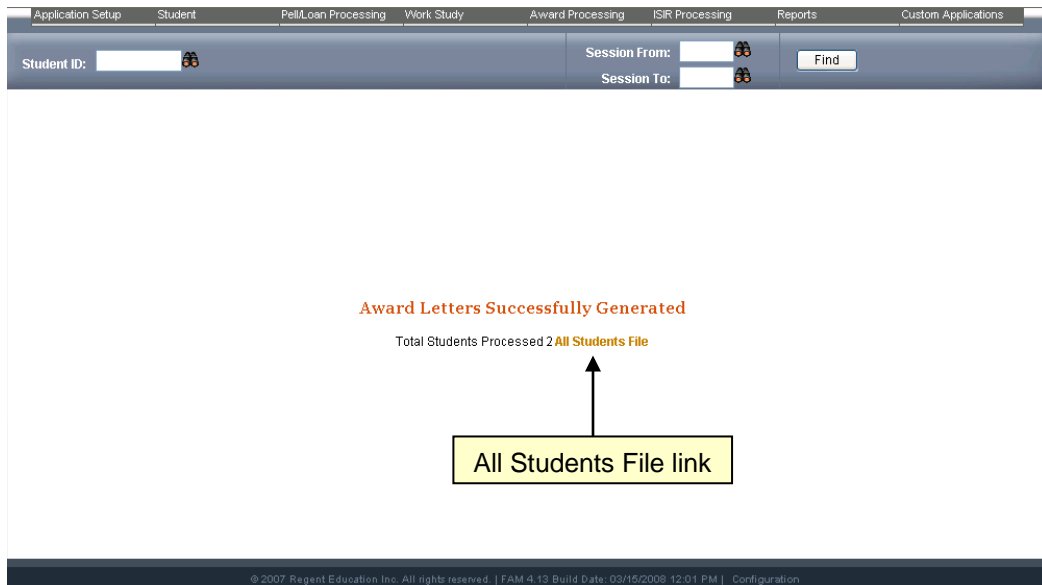
1. From the Institution and Award Year drop-down list, select the appropriate institution/award year.
2. Click one of the following radio buttons to specify the students for which award letters are printed:
 - Students that don't have an award letter
 - Students that have award(s) updated on or after their award letter was generated
 - Students that had an award letter generated between a certain date range
 - Students that have award(s) with an activity date within a certain date range
 - Individual students
3. Click the Browse button located to the right of the Award Template field, which opens the Choose File dialog box. Select your award letter template by navigating to the appropriate file on your PC or network drive and clicking the Open button:



The path and filename of your award letter template is displayed in the Award Template field on the Award Letters page.

4. Complete the Due Date For Signed Award Letter field (required). This date populates the Due Date field on the Tracking Data page. Usually this is the date the letters are run.

5. You have the option to email award letters to students. Complete the fields in the Email Option section of this page (see page 6) and letters will be sent via email to students for whom email addresses have been recorded in the Email Address field on the Student Data page in a valid format (username@domain name). The procedure does not check if the email address is actually valid. If the email address turns out to be invalid, the email will bounce back to the email address included in the From Address field in the Email Option section of the Award Letters page.
- Note: do not enter any forward slashes '/' in any of these fields. The letter process will think that is part of a pathway. It will not produce any letters and will give an error of 'The system cannot find the path specified'.
6. If you want to use a student address other than the master (address type MSTR), complete the Alternate Address Type and Alternate Address Code fields. Or you can click the Lookup icon  for each field: this allows you to search for address type and code by value or description.
 7. Select a Sort Option for the award letters: the students' last name, ZIP code, or ID.
 8. Once all fields are complete, click the Get Letters button or the Schedule As Task button. The Get Letters button generates the letters as soon as possible, depending on how many letters are generated. Selecting the Schedule As Task button generates the letters as soon as system resources are available. We recommend using the Schedule As Task option if you are expecting a large number of award letters.
 9. Once the award letters are generated, a message is displayed indicating that the letters were generated successfully:

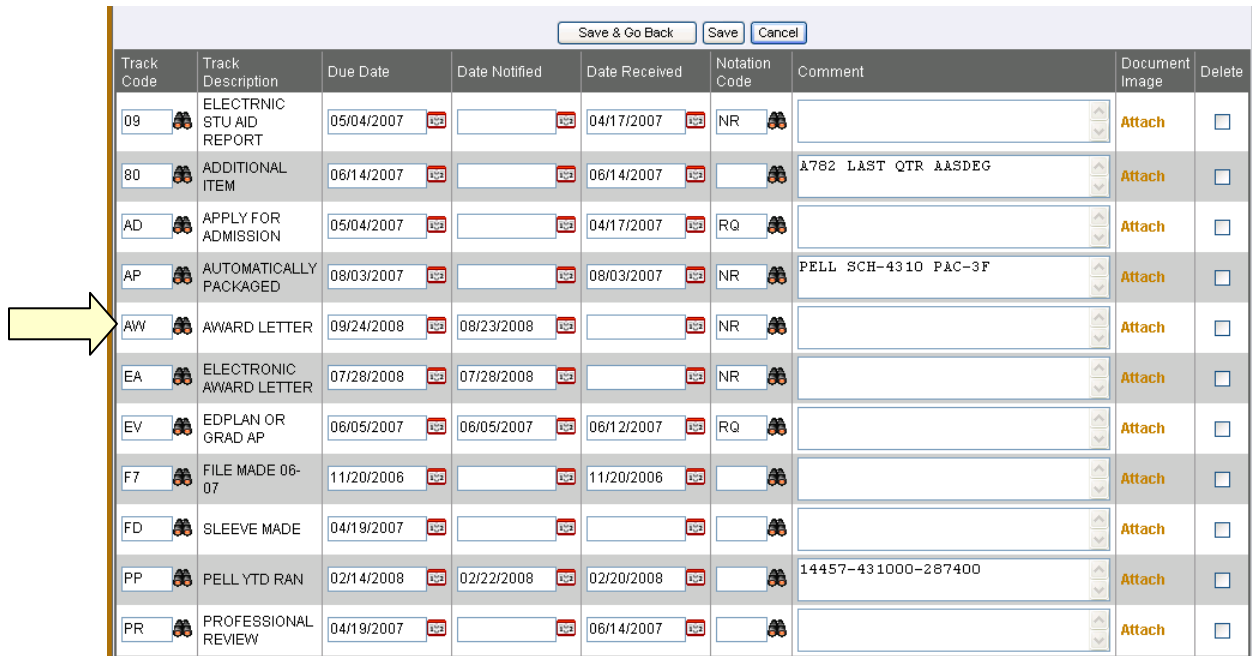


10. To access the letters, click the 'All Students File' link below the message.

A dialog box appears asking whether you would like to Open or Save the file.

11. To print the letters, click Open and print the letters to a local printer in your office.

Once award letters are generated, the AW tracking code is posted to each student's Tracking Data page for the beginning year/session (for example, A891). The Due Date field is populated with the date entered during the Award Letter generation process. The Date Notified field is populated with the date the letter was generated:



Track Code	Track Description	Due Date	Date Notified	Date Received	Notation Code	Comment	Document Image	Delete
09	ELECTRNIC STU AID REPORT	05/04/2007		04/17/2007	NR		Attach	<input type="checkbox"/>
80	ADDITIONAL ITEM	06/14/2007		06/14/2007		A782 LAST QTR AASDEG	Attach	<input type="checkbox"/>
AD	APPLY FOR ADMISSION	05/04/2007		04/17/2007	RQ		Attach	<input type="checkbox"/>
AP	AUTOMATICALLY PACKAGED	08/03/2007		08/03/2007	NR	PELL SCH-4310 PAC-3F	Attach	<input type="checkbox"/>
AW	AWARD LETTER	09/24/2008	08/23/2008		NR		Attach	<input type="checkbox"/>
EA	ELECTRONIC AWARD LETTER	07/28/2008	07/28/2008		NR		Attach	<input type="checkbox"/>
EV	EDPLAN OR GRAD AP	06/05/2007	06/05/2007	06/12/2007	RQ		Attach	<input type="checkbox"/>
F7	FILE MADE 06-07	11/20/2006		11/20/2006			Attach	<input type="checkbox"/>
FD	SLEEVE MADE	04/19/2007					Attach	<input type="checkbox"/>
PP	PELL YTD RAN	02/14/2008	02/22/2008	02/20/2008		14457-431000-287400	Attach	<input type="checkbox"/>
PR	PROFESSIONAL REVIEW	04/19/2007		06/14/2007			Attach	<input type="checkbox"/>

Tracking Data Maintenance page, showing the AW Track Code, Due Date, and Date Notified.

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Appendix A: Additional Award Letter Options

Page Title: Processing Table Search

Navigation: Application Setup → Processing Config → Processing Table

Exclude First Paragraph from Award Letter

An option is available to exclude the first paragraph from the award letter. The first paragraph deals with the date the student is to return the award letter to the Financial Aid Office. The Financial Aid Office would then use the letter template (see section 2.2 on page 5) to specify the number of days the student has to respond to or return the award letter.

System: SAF

Table ID: AGENCY

Value: SAF010-NO-DATE

Description: NO DATE ON AWARD LETTERS

Print Selected Financial Aid Data on Award Letters

The standard award letter format includes the student's financial data for the current award year. This includes data such as the student's budget code, budget amount, need, and Pell index, as well as student and family income and contribution figures.

You have the option of determining which of these items will appear, as well as the order in which they appear. Note that if you do not have the entry to eliminate financial data (Exclude Financial Aid Data from Award Letters) set, all financial data will print at the bottom of the award letter.

System: SAF

Table ID: AGENCY

Value: SAF010-FAF-LIST

Description: Numbers 01 through 12, which correspond to the financial aid data that you wish to print on the letter. Do not enter commas or spaces. For example, to print items 01, 06, 09, and 12, enter **01060912**. You may also designate the order in which to print the items (from left to right), for example, **09011206**.

The items and their corresponding number are as follows:

01 - Dep/Ind Code	05 - Parent Contrib	09 - Student Contrib
02 - Marital Status	06 - Pell Index	10 - Budget Code
03 - Parent Income	07 - Student Income	11 - Student Need
04 - Dependents (stdnt)	08 - Supplmt Amt	12 - Budget Amount

Print Budget Classification on Award Letters

This feature provides for printing the student's budget description and, optionally, the budget amount on the award letter. When using the budget supplement option (Budget Supplement Process), you may optionally print the budget detail or the budget detail plus enrollment data. To establish this option, please be sure that each budget code has a description on the Validation Table. These descriptions are entered on the SAF_STD_BUD_CODE validation table.

Note: The budget information on the lower portion of the Validation Table Maintenance screen corresponds to the institution's budget code data. Please be sure to include the 99 budget code for nonstandard budgets.

If you do not want to include any financial aid data on the letter, the SAF010-NO-FAF entry must be entered on the Processing Table (see the next table option, *Exclude Financial Aid Data from Award Letters*, below).

To initiate the option to print the budget description on the award letter:

System: SAF

Table ID: AGENCY

Value: SAF010-BUD-CD

Description:

- To print only the budget description the Description must be: PRINT BUDGET CODE ON AWARD LETTER
- To include both the budget description and budget amount, the Description must be: Y
- To include the budget detail data on the award letter, the Description must be: D
- To include the budget detail data and the enrollment detail on the award letter, the Description must be: DE

Note: It is possible to use this option concurrently with the option to print all or selected financial aid data, as mentioned in the table option prior to this one.

Exclude Financial Aid Data from Award Letters

The standard award letter format includes the student's financial data for the current award year. This includes data such as the student's budget code, budget amount, need, and Pell index, as well as student and family income and contribution figures.

If you do not want this data printed on the award letter, enter the following:

System: SAF

Table ID: AGENCY

Value: SAF010-NO-FAF

Description: NO FAF DATA ON AWARD LETTER

Exclude Award Codes from Award Letters

This option excludes printing of the award code on the award letter. The award description still prints. To exclude the award code, enter the following:

System: SAF

Table ID: AGENCY

Value: SAF010-NO-CODE

Description: NO AWARD CODE ON AWARD LETTER

Eliminate Student Signature on Award Letter

This option eliminates the signature line where students sign the award letter. This option also eliminates the accept/reject fields, as well as the first paragraph, which tells the student to sign the award letter and return it.

To initiate this option, enter the following:

System: SAF

Table ID: AGENCY

Value: SAF010-NO-SIGN

Description: NO SIGNATURE ON AWARD LETTER

Since the first paragraph is automatically eliminated with this option, it is not necessary to use the Exclude First Paragraph option (see page 11).

Suppress Specified Awards from Award Letters

This option excludes printing of certain award codes on the award letter.

System: SAF

Table ID: AGENCY

Value: SAF010-NO-PRINT

Description: Up to 20, 2-character award codes that you do not want to print on the award letter, with no spaces or commas between codes. For example, to suppress printing of award codes 92, 55, 52, 29, and 39, enter **9255522939**

Suppress Award Letter Printing

This option suppresses the generation and printing of an award letter when the specified award codes are updated. This option is initiated by the following entry:

System: SAF

Table ID: AGENCY

Value: SAF010-EXCLUDE

Description: Up to 20, 2-character award codes to be excluded. Specifying at least one an award code will prevent the system from printing award letters when updates are made to the specified award code(s). To exclude *more than 20* award codes, use the additional entry:

System: SAF

Table ID: AGENCY

Value: SAF010-EXC-EXT

Description: Up to twenty (20) additional, 2-character award codes to be excluded. This option is not in effect when printing award letters by individual ID number. It is used with the option to print award letters for awards added or updated since you specified date.

Print Alternate ID on Award Letter

This option prints an alternate ID number for the student on the award letter, under the standard Social Security Number. The alternate ID is displayed in the Alternate ID field on the Student Data (FAM501) Tab.

To initiate this option, enter the following:

System: SAF


Table ID: AGENCY

Value: SAF010-VISA

Description: Y

Remove Financial Aid Officer Name from Award Letter

By default, the financial aid officer's name and title prints at the bottom of the award letter. This information is taken from the FAM Institution Code (FAM621) page.

(Application Setup → New Year → Import Institution → Edit icon  : FAO Name and FAO Title. However, there may be instances in which schools do not want to print the name and/or title on the letter. There are two options to remove the data: one for the Financial Aid Officer name, and the other for the Financial Aid Officer title. These options are initiated as follows:

To remove the Financial Aid Officer's *name*:

System: SAF

Table ID: AGENCY

Value: FAO-NM-OVcc where *cc* is the code for the campus for which the financial aid officer's name is to be removed from the award letters. This option allows you to suppress the name on the award letters from a particular campus.

Description: The name that is to print on the award letters. When the Description is blank, no name is printed on the award letters.

To remove the Financial Aid Officer *title*:

System: SAF

Table ID: AGENCY

Value: FAO-TITLE-OVcc where *cc* is the code for the campus for which the financial aid officer's title is to be removed from the award letters. This option allows you to suppress the title for the award letters from a particular campus.

Description: The title that is to print on the award letters. When the Description is blank, no title is printed on the award letters.

Suppress Portion of ID Number

This option suppresses all or a portion of the student's social security number from the award letter. This option is initiated as follows:

System: SAF

Table ID: AGENCY

Value: SAF010-SUP-ID

Description: A combination of Xs and 9s that control display of the number. For example, typing **XXXXX9999** in the Description prompts FAM to display only the last four digits of the social security number on the award letter.

Sample Award Letter

FINANCIAL AID NOTIFICATION

HAPPY VALLEY COMMUNITY COLLEGE
333 GIGGLES LANE
SMILEY, WA 98907-2520

08/24/2008

OSCAR T GROUCH
111 LOUDON ROAD
HARRAH, WA 98933

SAF010-SUP-ID

STUDENT NUMBER

XXXXXX9978
865078200

SAF010-VISA

Your ESTIMATED 2008-09 student financial aid award is shown below. Initial awards are for FULLTIME enrollment (14 or more credits if you have State Need Grant, 12 credits for other programs). If you enroll less than fulltime, complete an ENROLLMENT REVISION no later than two weeks prior to the start of the quarter: www.hvcc.edu/Financialaid Without the revision, your aid will NOT pay your tuition.

STATE NEED GRANT: The amount of your State Need Grant varies by the number of credits you enroll in. A revised award notification will be sent to you as changes to your eligibility occur.

Financial aid first pays tuition and a check prints for the balance. This check will be mailed by the Business Office to the current address on file in the Registration Office.

****Always keep your address current: www.hvcc.edu****

****THIS AWARD MAY CHANGE due to fund availability or policy changes.**** You must let us know if you receive additional money to pay for college costs if that funding is not listed on this letter. ***READ*** all of the materials in this letter, on <http://www.hvcc.edu/Financialaid/>, and in the Financial Aid section of the catalog. You must understand the process and the academic requirements.

****AWARDED LOANS? You must complete entrance counseling and procedures.**

Grid format (for array format, use SAF010-ARRAY)

	A W A R D	AMOUNT	ACCEPT	REJECT
FALL 08	From 09/22/2008		To 12/10/2008	
Session-A892				
	01-FEDERAL PELL GRANT	\$1,000.00	_____	_____
	09-ST NEED GRANT/SSIG	\$851.00	_____	_____
	** SESSION TOTAL	\$1,851.00		
WINTER 09	From 01/05/2009		To 03/18/2009	
Session-A893				
	01-FEDERAL PELL GRANT	\$1,000.00	_____	_____
	09-ST NEED GRANT/SSIG	\$851.00	_____	_____
	** SESSION TOTAL	\$1,851.00		
SPRING 09	From 03/30/2009		To 06/10/2009	
Session-A894				
	01-FEDERAL PELL GRANT	\$1,000.00	_____	_____
	09-ST NEED GRANT/SSIG	\$852.00	_____	_____

Text created in Microsoft Word

To prevent award codes from printing, use SAF010-NO-CODE

Award name is in long form from the Awd Code Edit page

** SESSION TOTAL \$1,852.00

SUMMER 09 From 06/22/2009 To 08/11/2009

Session-A895

09-ST NEED GRANT/SSIG \$852.00

** SESSION TOTAL \$852.00

*** GRAND TOTAL \$6,406.00

To list student FAF data, use SAF010-FAF-LIST

Your awards were based on data covering sessions SUMMER 08 to SUMMER 09.

Budget Amount 14979 Parent Contrib. 0

Student Contrib 0 Student Need 14979

FA Director's Name

FA Director Title

XXXXX9978 OSCAR T GROUCH

To remove or change, use
FAO-NM-OVcc OR FAO-TITLE-OVcc

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Appendix B: Using the Text File Upload/Download Process (SM9949)

You can use the Text File Upload/Download Process (SM9949) to download your existing award letter text file(s) from the HP3000 to your PC, edit the file in Microsoft Word, and then save the file in Rich Text Format (.RTF) and use it to generate award letters through FAM.

Text files on the HP3000 can either be numbered or unnumbered. A numbered file, when downloaded from the HP3000 and opened in Microsoft Word, has a series of numbers along the right margin at the end of each text line. There are three ways to handle a numbered file:

- You can delete the numbers in Microsoft Word while editing the file.
- If deleting those numbers is too cumbersome, you may create the file from scratch in Microsoft Word.
- Call CIS Customer Support and request to have the file converted to an unnumbered file.

An unnumbered file is downloaded without numbers in the margins and does not require any special editing in Microsoft Word.

To download a text file from the HP3000, complete the following steps:

1. From the FAS Menu, at the Process ID prompt, type **SM9949**

The Upload/Download screen is displayed:

Sample: Text File Upload/Download Process (SM9949) – First Screen

```
SM9949 - VER001
Enter one of the following, and press RETURN.

> FILENAME to upload or download

ACADTBL1 thru ACADTBL9
AUTHMESS
AWMESS, AWMESS1 thru AWMESS9
CHKFORM1 thru CHKFORM9
CHKMESS
HRSTBL1 thru HRSTBL9
LETTER01 thru LETTER99
PELL1 thru PELL9
PELLERRS
TIMEMESS
TRACK1 thru TRACK9
TRNMESS
WAMESS

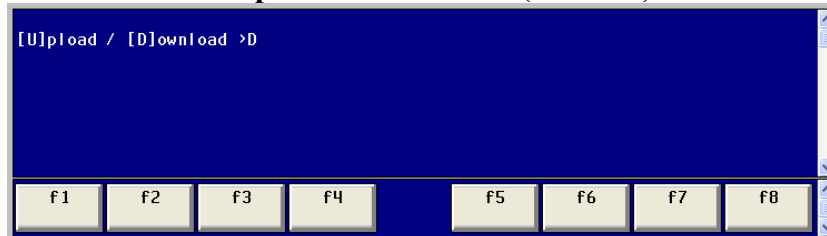
> LIST to show existing files
> HELP to display this screen
> EXIT to return to MENU

Enter FILENAME >AWMESS1
```

- This screen is similar to the Online Text Editor Screen (SM9908); however, you use this screen to specify the text file on the HP3000 to be downloaded to your PC or a network drive. At the “Enter FILENAME” prompt, type **AWDMESS1** and press Enter.

The following screen is displayed:

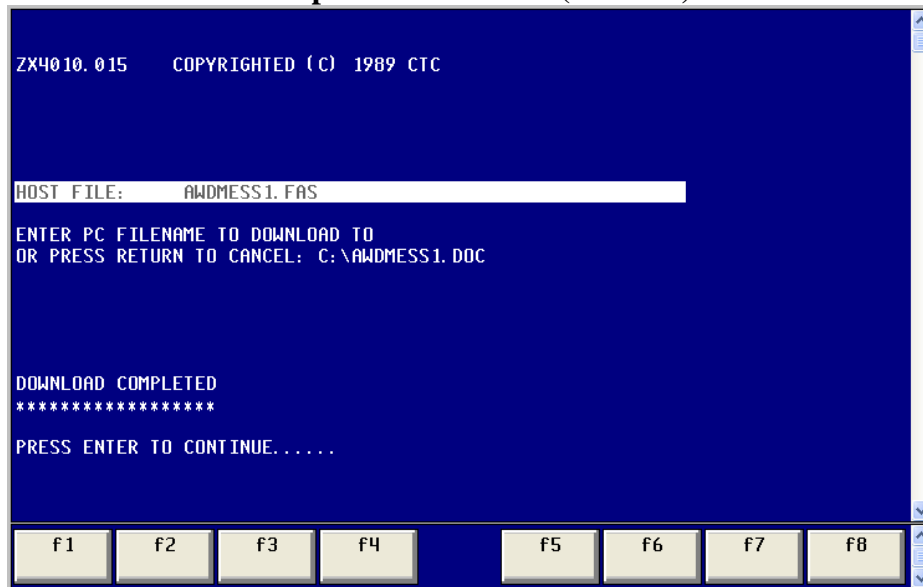
Sample: Second Screen (SM9949)



- You want to download the file *from* the HP3000 *to* the PC or network drive; therefore, at the “[U]pload/ [D]ownload” prompt, type **D** and press Enter.

The following screen is displayed:

Sample: Third Screen (SM9949)



- At the “ENTER PC FILENAME TO DOWNLOAD TO...” prompt, type the path (for the PC or network drive) and the file name you want to download the file to.

Make sure the path name does not include any spaces, for example, **C:\My Documents**. If there are any spaces in the path name, the HP3000 file transfer process will not be able to download the file. Also, it is important to specify the file name with an .rtf extension to associate the downloaded file with Microsoft Word.

- Once the file is downloaded to the PC or network drive, you can access it using Windows Explorer. Navigate to the folder you specified in the file path when downloading the text file and double-click the file to open it in Microsoft Word.