



Overview

Adding loan fees in the cost of attendance for students offered Direct Loan (DL) funding is recommended by the Department of Education so a process was created.

The following is an overview of process the Loan Fee Jobset will go through:

- 1) The **four remove Student Group Run Control IDs** (*one for each term in the aid year*) will look for students in the Loan Fee Student Groups but no longer offered a Direct Loan item-type for the term(s) and remove the student from the Student Group(s)
- 2) The **four assign Student Group Run Control IDs** (*one for each term in the aid year*) will look for students offered a Direct Loan item-type and assign them to the Loan Fee Student Groups

For example, a student offered DL for Fall, Winter and Spring will be placed into three Student Groups: Loan Fall, Loan Winter and Loan Spring

- 3) The **assign Budget Flag 'Y' Run Control ID** will flag the students that were added or removed from each Loan Fee Student Group so that the college's ISIR Jobset will pick up the students for a budget update
- 4) The **Loan Fee budget item(s)** will be added to the student's budgets via Budget Formulas referencing the Loan Fee Student Group(s) the student is in or recognize the student is no longer in the Loan Fee Student Group(s) and remove the Loan Fee budget item(s)

Before you go through the guide, you will need to calculate the average loan fee rate for your students and determine the loan fee amount for a single term.



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Preparation

Prep 1: Student Group Security

The role you will need to perform the assigning and removing of Student Groups is: ZZ CS Student Groups. If you do not have this role, work with your Security Administrator to have it added to your EMPLID.

You will also need to work with your Security Administrator to get access to the following eight new Loan Fee Student Groups set up by FA ERP Support:

Even Year

- FLE1 – Financial Aid Loan EY Winter
- FLE3 – Financial Aid Loan EY Spring
- FLE5 – Financial Aid Loan EY Summer
- FLE7 – Financial Aid Loan EY Fall

Odd Year

- FLO1 – Financial Aid Loan OY Winter
- FLO3 – Financial Aid Loan OY Spring
- FLO5 – Financial Aid Loan OY Summer
- FLO7 – Financial Aid Loan OY Fall





You will need both *Inquiry Indicator* and *Update Indicator* selected for your EMPLID.





















Student Group Security




User ID

Name

Institution

Security Settings
Personalize | Find | View 100 |  
First  21-30 of 148  Last

* Student Group	Description	Inquiry Indicator	Update Indicator	
<input type="text" value="FLE1"/>	Financial Aid Loan EY Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text" value="FLE3"/>	Financial Aid Loan EY Spring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text" value="FLE5"/>	Financial Aid Loan EY Summer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text" value="FLE7"/>	Financial Aid Loan EY Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text" value="FLO1"/>	Financial Aid Loan OY Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text" value="FLO3"/>	Financial Aid Loan OY Spring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text" value="FLO5"/>	Financial Aid Loan OY Summer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text" value="FLO7"/>	Financial Aid Loan OY Fall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
<input type="text"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 

 Save
 Return to Search
 Notify

Note: If it's important for everyone in your office to see these new Student Groups, make sure to have your Security Administrator give them Inquiry Indicator.

Prep 2: Budget Items

NAVIGATION: Set Up SACR > Product Related > Financial Aid > Budgets > Budget Items

Navigate to *Budget Items* then select your college's LOAN Budget Item Category for the aid year (2024 is the aid year that will be used throughout the guide) and update the following areas on the existing row

Budget Item Code: LOANZN

Description: ZERO LOAN FEES NO LOAD

Short Description: Zero Loan

Budget Multiplier: Selected then FA_NUMBER_OF_WEEKS

Pell Annual Amount: 1.00

Pell Less Half Annual Amount: 1.00

Long Description: ZERO LOAN FEES NO LOAD

Create Budget Items

Institution

Aid Year 2024 2023-2024 Financial Aid Year

Budget Item Category LOAN Loan Fees

Item Classification Federal

Pell Category Student Activities Fees

Copy Setup Data

Budget Item

Find | View All First 1 of 1 Last

*Budget Item Code LOANZN

*Description ZERO LOAN FEES NO LOAD

*Budget Item Amount 1.00 USD

Budget Multiplier: ☒ FA_NUMBER_OF_WEEKS

Pell Annual Amount 1.00

Pell Less Half Annual Amount 1.00

Long Description ZERO LOAN FEES NO LOAD

Short Description Zero Loan

Add a second row then update the following areas

Budget Item Code: LOANZL

Description: ZERO LOAN FEES LESS ½ TIME

Short Description: LoanFeeZ



Budget Item Amount: 1.00

Budget Multiplier: *Selected* then FA_NUMBER_OF_WEEKS

Pell Annual Amount: 1.00

Pell Less Half Annual Amount: 1.00

Long Description: ZERO LOAN FEES LESS ½ TIME

Create Budget Items

Institution

Aid Year 2024 2023-2024 Financial Aid Year

Budget Item Category LOAN Loan Fees

Item Classification Federal

Pell Category Student Activities Fees

[Copy Setup Data](#)

Budget Item Find | View All First 1 of 2 Last

*Budget Item Code

*Description Short Description

*Budget Item Amount

Budget Multiplier: ☒

Pell Annual Amount

Pell Less Half Annual Amount

Long Description

Add a third row then update the following areas

Budget Item Code: LOANF1

Description: WINTER LOAN FEES

Short Description: LoanFee1

Budget Item Amount: (one term loan fee amount)

Pell Annual Amount: (three quarter total loan fee amount)

Pell Less Half Annual Amount: (three quarter loan fee amount)

Long Description: WINTER LOAN FEES



Loan Fee Jobset Setup Guide

Create Budget Items

Institution

Aid Year 2024 2023-2024 Financial Aid Year

Budget Item Category LOAN Loan Fees

Item Classification Federal

Pell Category Student Activities Fees

[Copy Setup Data](#)

Budget Item Find | View All First 1 of 3 Last

*Budget Item Code

*Description Short Description

*Budget Item Amount USD

Budget Multiplier: ☐

Pell Annual Amount

Pell Less Half Annual Amount

Long Description

Budget Item Code: LOANF3

Description: SPRING LOAN FEES

Short Description: LoanFee3

Budget Item Amount: (one term loan fee amount)

Pell Annual Amount: (three quarter total loan fee amount)

Pell Less Half Annual Amount: (three quarter loan fee amount)

Long Description: SPRING LOAN FEES

Create Budget Items

Institution

Aid Year 2024 2023-2024 Financial Aid Year

Budget Item Category LOAN Loan Fees

Item Classification Federal

Pell Category Student Activities Fees

[Copy Setup Data](#)

Budget Item Find | View All First 2 of 4 Last

*Budget Item Code

*Description Short Description

*Budget Item Amount USD

Budget Multiplier: ☐

Pell Annual Amount

Pell Less Half Annual Amount

Long Description

Budget Item Code: LOANF5



Description: SUMMER LOAN FEES

Short Description: LoanFee5

Budget Item Amount: (one term loan fee amount)

Pell Annual Amount: (three quarter total loan fee amount)

Pell Less Half Annual Amount: (three quarter loan fee amount)

Long Description: SUMMER LOAN FEES

Create Budget Items

Institution		
Aid Year	2024	2023-2024 Financial Aid Year
Budget Item Category	LOAN	Loan Fees
Item Classification	Federal	
Pell Category	Student Activities Fees	

[Copy Setup Data](#)

Budget Item Find | View All First 3 of 5 Last

*Budget Item Code	LOANF5	
*Description	SUMMER LOAN FEES	Short Description LoanFee5
*Budget Item Amount	37.00	USD
Budget Multiplier:	<input type="checkbox"/>	
Pell Annual Amount	111.00	
Pell Less Half Annual Amount	111.00	
Long Description	SUMMER LOAN FEES	

Budget Item Code: LOANF7

Description: FALL LOAN FEES

Short Description: LoanFee7

Budget Item Amount: (one term loan fee amount)

Pell Annual Amount: (three quarter total loan fee amount)

Pell Less Half Annual Amount: (three quarter loan fee amount)

Long Description: FALL LOAN FEES



Create Budget Items

Institution

Aid Year 2024 2023-2024 Financial Aid Year

Budget Item Category LOAN Loan Fees

Item Classification Federal

Pell Category Student Activities Fees

[Copy Setup Data](#)

Budget Item Find | View All First 4 of 6 Last

*Budget Item Code

*Description Short Description

*Budget Item Amount USD

Budget Multiplier: ☐

Pell Annual Amount

Pell Less Half Annual Amount

Long Description

Save your work!

Prep 3: Budget Formulas

NAVIGATION: Set Up SACR > Product Related > Financial Aid > Budgets > Budget Formulas

Navigate to *Budget Formulas* then search for your college's LOAN Budget Item Category for the aid year and confirm you do not have one then select **Add a New Value**

Budget Formulas

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

*Academic Institution

*Aid Year

Budget Item Category

☐ Include History ☒ Correct History

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

No matching values were found.

Budget Formulas

[Find an Existing Value](#) [Add a New Value](#)

*Academic Institution

*Aid Year

*Budget Item Category

[Add](#)

Note: If you already have a LOAN Budget Item Category, you will select it and your first step will be to add a new effective dated row of today and update existing rows with the parameters in this section. You may need to add or delete more rows of formulas depending on how many rows already exist.

Fill In the following areas on the first processing order row

Processing Order: 5

Budget Item Code: LOANZN

Budget Formula Budget Formula Groups

Academic Institution Aid Year 2024 Copy Setup Data

Category LOAN Loan Fees

Formula Definition Find First 1 of 6 Last

*Effective Date 07/18/2023 *Status Active

Formula Detail Find View 1 First 1 of 1 Last

Formula Number 1 *Processing Order 5 Amount 1.00

*Budget Item Code LOANZN Budget Multiplier Field FA_NUMBER_OF_WEEKS

*Description ZERO LOAN FEES NO LOAD Short Description Zero Loan

Formula Definition Personalize Find 1-2 of 2

*Field Name	*Operation	*Field Value	AND/OR

Add one more row under *Formula Definitions* and select the following parameters

1 Field Name: FA_LOAD

Operation: =

Field Value: N

AND/OR: AND

2 Field Name: STDNT_GROUP

Budget Formula Budget Formula Groups

Academic Institution Aid Year 2024 Copy Setup Data

Category LOAN Loan Fees

Formula Definition Find First 1 of 6 Last

*Effective Date 07/18/2023 *Status Active

Formula Detail Find View 1 First 1 of 1 Last

Formula Number 1 *Processing Order 5 Amount 1.00

*Budget Item Code LOANZN Budget Multiplier Field FA_NUMBER_OF_WEEKS

*Description ZERO LOAN FEES NO LOAD Short Description Zero Loan

Formula Definition Personalize Find 1-2 of 2

*Field Name	*Operation	*Field Value	AND/OR
1 FA_LOAD	=	N	AND
2 STDNT_GROUP			

Add a second processing order row then fill In and add the following areas

Processing Order: 10

Budget Item Code: LOANZL

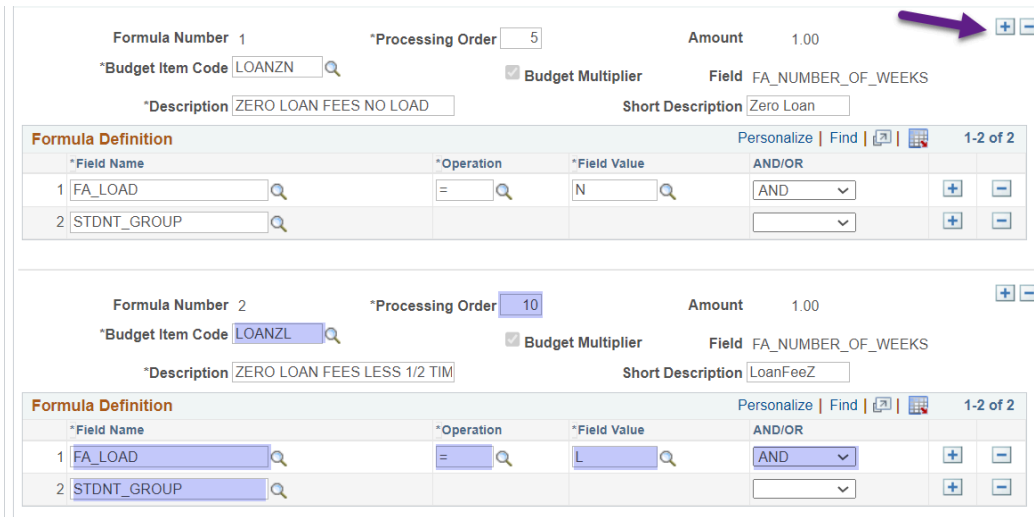
1 Field Name: FA_LOAD



Operation: =

Field Value: L

AND/OR: AND



2 Field Name: STDNT_GROUP









Formula Number 1 *Processing Order 5 Amount 1.00  

*Budget Item Code LOANZN ☒ Budget Multiplier Field FA_NUMBER_OF_WEEKS

*Description ZERO LOAN FEES NO LOAD Short Description Zero Loan



Formula Definition Personalize | Find |  |  1-2 of 2





*Field Name	*Operation	*Field Value	AND/OR		
1 FA_LOAD	=	N	AND		
2 STDNT_GROUP					

Formula Number 2 *Processing Order 10 Amount 1.00  

*Budget Item Code LOANZL ☒ Budget Multiplier Field FA_NUMBER_OF_WEEKS

*Description ZERO LOAN FEES LESS 1/2 TIM Short Description LoanFeeZ

Formula Definition Personalize | Find |  |  1-2 of 2

*Field Name	*Operation	*Field Value	AND/OR		
1 FA_LOAD	=	L	AND		
2 STDNT_GROUP					

Add a third processing order row then fill in and add the following areas

Processing Order: 15

Budget Item Code: LOANF7

1 Field Name: STRM

Operation: =

Field Value: (Fall Term)

AND/OR: AND


2 Field Name: FA_LOAD

Operation: <>

Field Value: L

AND/OR: AND


3 Field Name: STDNT_GROUP

Formula Number 2 *Processing Order 10 Amount 1.00 

*Budget Item Code LOANZL ☒ Budget Multiplier Field FA_NUMBER_OF_WEEKS

*Description ZERO LOAN FEES LESS 1/2 TIM Short Description LoanFeeZ

Formula Definition				Personalize	Find		1-2 of 2
*Field Name	*Operation	*Field Value	AND/OR				
1 FA_LOAD	=	L	AND			+	-
2 STDNT_GROUP						+	-

Formula Number 3 *Processing Order 15 Amount 37.00 

*Budget Item Code LOANF7 ☐ Budget Multiplier Field

*Description FALL LOAN FEES Short Description LoanFee7

Formula Definition				Personalize	Find		1-3 of 3
*Field Name	*Operation	*Field Value	AND/OR				
1 STRM	=	2237	AND			+	-
2 FA_LOAD	<>	L	AND			+	-
3 STDNT_GROUP						+	-

Add a fourth processing order row then fill In and add the following areas

Processing Order: 20

Budget Item Code: LOANF1

1 Field Name: STRM

Operation: =

Field Value: (Winter Term)

AND/OR: AND


2 Field Name: FA_LOAD

Operation: <>

Field Value: L

AND/OR: AND


3 Field Name: STDNT_GROUP

Formula Number 3 *Processing Order 15 Amount 37.00 

*Budget Item Code LOANF7 ☐ Budget Multiplier Field

*Description FALL LOAN FEES Short Description LoanFee7

Formula Definition				Personalize	Find		1-3 of 3
*Field Name	*Operation	*Field Value	AND/OR				
1 STRM	=	2237	AND			+	-
2 FA_LOAD	<>	L	AND			+	-
3 STDNT_GROUP						+	-

Formula Number 4 *Processing Order 20 Amount 37.00 

*Budget Item Code LOANF1 ☐ Budget Multiplier Field

*Description WINTER LOAN FEES Short Description LoanFee1

Formula Definition				Personalize	Find		1-3 of 3
*Field Name	*Operation	*Field Value	AND/OR				
1 STRM	=	2241	AND			+	-
2 FA_LOAD	<>	L	AND			+	-
3 STDNT_GROUP						+	-

Add a fifth processing order row then fill In and add the following areas

Processing Order: 25

Budget Item Code: LOANF3

1 Field Name: STRM

Operation: =

Field Value: (Spring Term)

AND/OR: AND

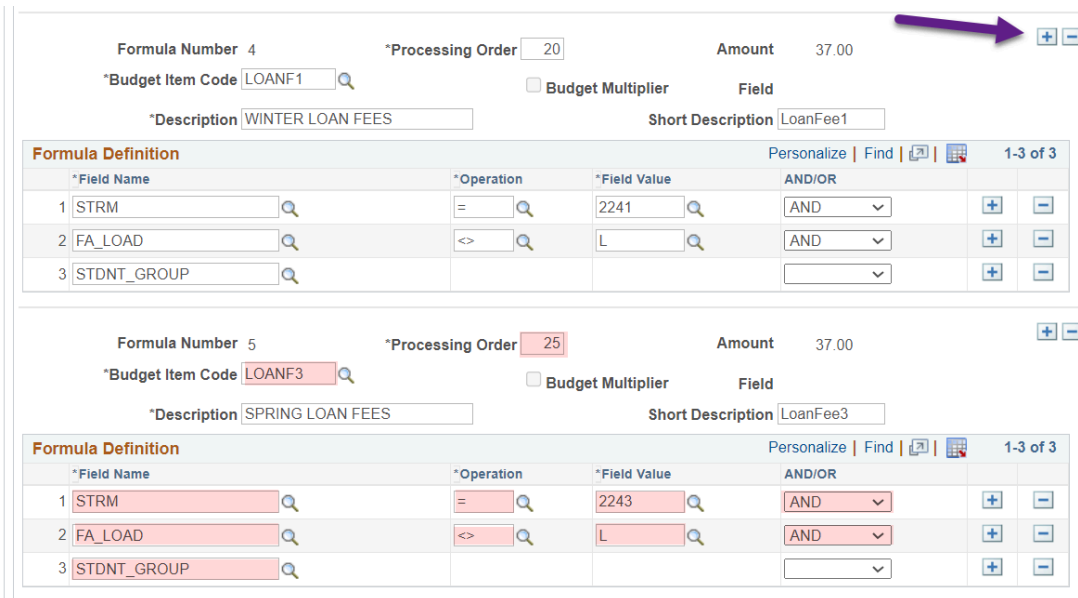
2 Field Name: FA_LOAD

Operation: <>

Field Value: L

AND/OR: AND



3 Field Name: STDNT_GROUP



Formula Number 4 *Processing Order 20 Amount 37.00 + -

*Budget Item Code LOANF1 ☐ Budget Multiplier Field



*Description WINTER LOAN FEES Short Description LoanFee1

Formula Definition				Personalize Find  	1-3 of 3
*Field Name	*Operation	*Field Value	AND/OR		
1 STRM	=	2241	AND	+ -	
2 FA_LOAD	<>	L	AND	+ -	
3 STDNT_GROUP				+ -	

Formula Number 5 *Processing Order 25 Amount 37.00 + -

*Budget Item Code LOANF3 ☐ Budget Multiplier Field

*Description SPRING LOAN FEES Short Description LoanFee3

Formula Definition				Personalize Find  	1-3 of 3
*Field Name	*Operation	*Field Value	AND/OR		
1 STRM	=	2243	AND	+ -	
2 FA_LOAD	<>	L	AND	+ -	
3 STDNT_GROUP				+ -	

Add a sixth processing order row then fill In and add the following areas

Processing Order: 30

Budget Item Code: LOANF5

1 Field Name: STRM

Operation: =

Field Value: (Summer Term)

AND/OR: AND

2 Field Name: FA_LOAD

Operation: <>

Field Value: L

AND/OR: AND

3 Field Name: STDNT_GROUP

Formula Number 5 *Processing Order 25 Amount 37.00

*Budget Item Code LOANF3 ☐ Budget Multiplier Field

*Description SPRING LOAN FEES Short Description LoanFee3

Formula Definition Personalize | Find | 1-3 of 3

*Field Name	*Operation	*Field Value	AND/OR		
1 STRM	=	2243	AND	+	-
2 FA_LOAD	<>	L	AND	+	-
3 STDNT_GROUP				+	-

Formula Number 6 *Processing Order 30 Amount 37.00

*Budget Item Code LOANF5 ☐ Budget Multiplier Field

*Description SUMMER LOAN FEES Short Description LoanFee5

Formula Definition Personalize | Find | 1-3 of 3

*Field Name	*Operation	*Field Value	AND/OR		
1 STRM	=	2245	AND	+	-
2 FA_LOAD	<>	L	AND	+	-
3 STDNT_GROUP				+	-

Select the **Budget Formula Groups** tab then add three more rows to the Student Groups section of Formula Number 1 Processing Order 5

Budget Formula **Budget Formula Groups**

Academic Institution Aid Year 2024

Category LOAN Loan Fees

Formula Definition Find First 1 of 7 Last

Effective Date 07/18/2023 Status Active

Formula Detail Find | View 1 First 1-6 of 6 Last

Formula Number 1 Processing Order 5 Amount 1.00

Budget Item Code LOANZN Description ZERO LOAN FEES NO LOAD

Student Groups Personalize | Find | 1-4 of 4

Field Name	Operation	Field Value	AND/OR		
1 STDNT_GROUP				+	-
2 STDNT_GROUP				+	-
3 STDNT_GROUP				+	-
4 STDNT_GROUP				+	-

Formula Number 2 Processing Order 10 Amount 1.00

Fill in the four rows with the following parameters

Operation: =	Field Value: FLE7	AND/OR: OR
Operation: =	Field Value: FLE1	AND/OR: OR
Operation: =	Field Value: FLE3	AND/OR: OR
Operation: =	Field Value: FLE5	

Budget Formula | **Budget Formula Groups**

Academic Institution Aid Year 2024

Category LOAN Loan Fees

Formula Definition Find First 1 of 7 Last

Effective Date 07/18/2023 Status Active

Formula Detail Find View 1 First 1-6 of 6 Last

Formula Number 1 Processing Order 5 Amount 1.00

Budget Item Code LOANZN Description ZERO LOAN FEES NO LOAD

Student Groups Personalize Find 1-4 of 4

Field Name	Operation	Field Value	AND/OR
1 STDNT_GROUP	=	FLE7	OR
2 STDNT_GROUP	=	FLE1	OR
3 STDNT_GROUP	=	FLE3	OR
4 STDNT_GROUP	=	FLE5	

Formula Number 2 Processing Order 10 Amount 1.00

Note: When creating the Run Control IDs for an odd year, the Student Groups you will be selecting are FLO1, FLO1, FLO3 and FLO5.

Move down to Formula Number 2 Processing Order 10 and add three more rows to the Student Groups section fill in the four rows with the following parameters



Operation: = **Field Value:** FLE7 **AND/OR:** OR

Operation: = **Field Value:** FLE1 **AND/OR:** OR

Operation: = **Field Value:** FLE3 **AND/OR:** OR

Operation: = **Field Value:** FLE5

4 STDNT_GROUP = FLE5

Formula Number 2  Processing Order 10  Amount 1.00

Budget Item Code LOANZN Description ZERO LOAN FEES LESS 1/2 TIME

Student Groups Personalize Find 1-4 of 4

Field Name	Operation	Field Value	AND/OR
1 STDNT_GROUP	=	FLE7	OR
2 STDNT_GROUP	=	FLE1	OR
3 STDNT_GROUP	=	FLE3	OR
4 STDNT_GROUP	=	FLE5	

Formula Number 3 Processing Order 15 Amount 37.00

Move down to Formula Number 3 Processing Order 15 and fill in the row with the following parameters

Operation: = **Field Value:** FLE7

Formula Number 3	Processing Order 15	Amount 37.00
Budget Item Code LOANF7	Description FALL LOAN FEES	
Student Groups Personalize Find 1 of 1		
Field Name	Operation	Field Value
1 STDNT_GROUP	=	FLE7

Move down to Formula Number 4 Processing Order 20 and fill in the row with the following parameters

Operation: = **Field Value: FLE1**

Move down to Formula Number 5 Processing Order 25 and fill in the row with the following parameters

Operation: = **Field Value: FLE3**

Move down to Formula Number 6 Processing Order 30 and fill in the row with the following parameters

Operation: = **Field Value: FLE5**

Formula Number 4	Processing Order 20	Amount 37.00
Budget Item Code LOANF1	Description WINTER LOAN FEES	
Student Groups Personalize Find 1 of 1		
Field Name	Operation	Field Value
1 STDNT_GROUP	=	FLE1

Formula Number 5	Processing Order 25	Amount 37.00
Budget Item Code LOANF3	Description SPRING LOAN FEES	
Student Groups Personalize Find 1 of 1		
Field Name	Operation	Field Value
1 STDNT_GROUP	=	FLE3

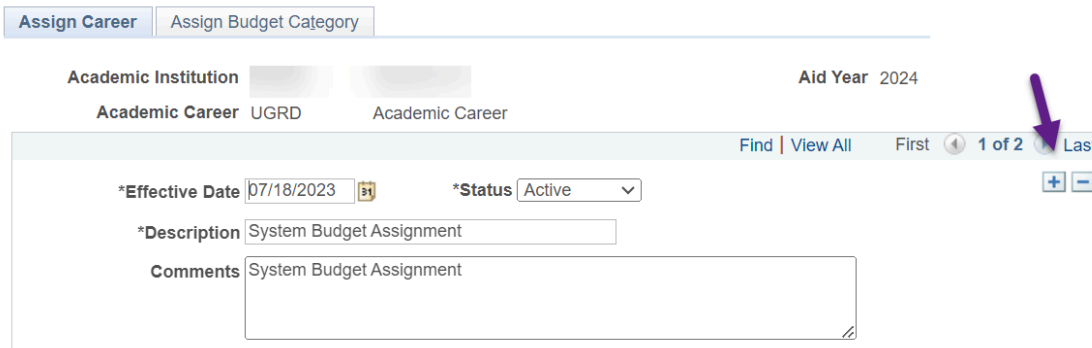
Formula Number 6	Processing Order 30	Amount 37.00
Budget Item Code LOANF5	Description SUMMER LOAN FEES	
Student Groups Personalize Find 1 of 1		
Field Name	Operation	Field Value
1 STDNT_GROUP	=	FLE5

Save your work!

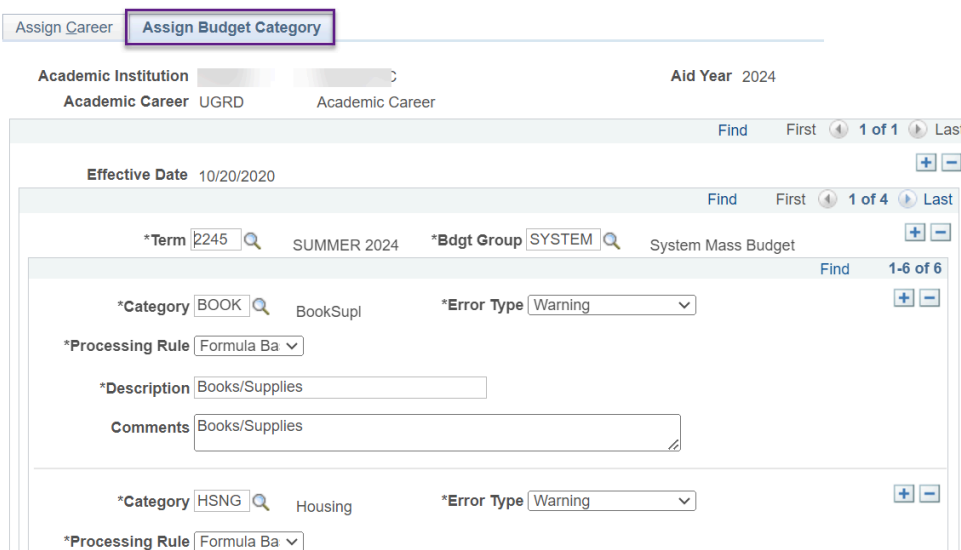
Prep 4: Budget Assignment

NAVIGATION: Set Up SACR > Product Related > Financial Aid > Budgets > Budget Assignment

Navigate to *Budget Assignment* for the aid year then add a new effective dated row of today on the first tab



Select the **Assign Budget Category** tab



Add a new row to so you can add the LOAN Category

Assign Career Assign Budget Category

Academic Institution Academic Career UGRD Academic Career

Aid Year 2024

Find First 1 of 2 Last

Effective Date 07/18/2023

Find First 2 of 4 Last

*Term 2243 SPRING 2024 *Bdgt Group SYSTEM System Mass Budget

Find 7 of 7

*Category BOOK BookSupl *Error Type Warning

*Processing Rule Formula Ba

*Description Books/Supplies

Comments Books/Supplies

*Category *Error Type

*Processing Rule Formula Ba

*Description

Comments

Select the following parameters on the new row

Category: LOAN

Error Type: Warning

Find First 1 of 2 Last

Effective Date 07/18/2023

Find First 2 of 4 Last

*Term 2243 SPRING 2024 *Bdgt Group SYSTEM System Mass Budget

Find 1-7 of 7

*Category BOOK BookSupl *Error Type Warning

*Processing Rule Formula Ba

*Description Books/Supplies

Comments Books/Supplies

*Category LOAN Loan Fees *Error Type Warning

*Processing Rule Formula Ba

*Description Loan Fees

Comments Loan Fees

*Category HSNH Housing *Error Type Warning

Toggle to the next term and repeat the same steps of adding a new row then selecting **Category:** LOAN and **Error Type:** Warning for all four terms.

Assign Career
Assign Budget Category

Academic Institution
Academic Career UGRD
Academic Career
Aid Year 2024

Find First 1 of 2 Last

Effective Date 07/18/2023
Find First 2 of 4 Last

*Term 2243 SPRING 2024 *Bdgt Group SYSTEM System Mass Budget
Find 1-8

*Category BOOK BookSupl *Error Type Warning
+ -

*Processing Rule Formula Ba

*Description Books/Supplies

Comments Books/Supplies

*Category LOAN Loan Fees *Error Type Warning
+ -

*Processing Rule Formula Ba

*Description Loan Fees

Comments Loan Fees

After adding the LOAN Category to each term, save your work!

Create *Remove* Student Group Run Control IDs (x4)

NAVIGATION: Records and Enrollment > Career and Program Information > Process Student Groups

Navigate to *Process Student Groups* then select **Add a New Value** to create a new Run Control ID for removing Fall Loan Student Group

Process Student Groups

Find an Existing Value
Add a New Value

*Run Control ID WA_EY_REMOVE_FLE7_

Add

Note: Make sure to put your college, EY or OY (depending on the aid year) and your initials in the Run Control ID. Example even year Run Control ID: WA123_EY_REMOVE_FLE7_DE

Select the following parameters for the Population Selection:

Selection Tool: PS Query

Query Name: QCS_FA_REMOVE_LOAN_FEES_TERM

Edit Prompts

Institution: (your college)

Aid Yr: (the aid year i.e. 2024)

Term: (Fall term i.e. 2237)

Group: FLE7 (since we're using the 2024 aid year in this guide)

Process Student Groups

Run Control ID
WA
_EY_REMOVE_FLE7_

[Report Manager](#)
[Process Monitor](#)
[Run](#)

Population Selection

☒ Population Selection

Selection Tool
PS Query

Query Name
QCS_FA_REMOVE_LOAN_FEES_TERM

[Edit Prompts](#)

[Launch Query Manager](#)

[Preview Selection Results](#)

Student Group Data

Query Prompts

*Institution

*Aid Yr
2024

*Term
2237

*Group (FLx7, FLx1, FLx3, FLx5)
FLE7

OK
Cancel

Select the following parameters in the *Student Group Data* section

Academic Institution: (your institution)

Student Group: FLE7

Effective Status: Inactive

Run Control ID WA220_EY_REMOVE_FLE7_DE [Report Manager](#) [Process Monitor](#) [Run](#)

Population Selection

☒ Population Selection

Selection Tool [Edit Prompts](#)
 Query Name [Launch Query Manager](#) [Preview Selection Results](#)

Student Group Data

*Academic Institution Tacoma CC ☐ Update Tuition Calc Required
 *Student Group Financial Aid Loan EY Fall
 *Effective Date [31](#)
 *Effective Status
 Comment

Student Override

☐ Student Override

Note: The *Effective Date* defaults to today's date. When you place this Run Control ID in the Loan Fee Budget jobset, there is a process in there that updates the effective date to the current date.

Save your work and note this Run Control ID in Excel or Word so that you can copy and paste it in the jobset.

Create Run Control IDs for each term in the aid year following the same steps but choosing FLE1, FLE3 or FLE5 accordingly. Make sure you've saved all the Run Control IDs and noted them before moving onto the next section.

Additional Info: If you would like to run the Run Control ID before putting it in a jobset, select the option: **Mass Student Group schedule to**. If you select **SCC_STD_GRP** option, the effective date will not be updated by the system to the current date and you will need to manually update the *Effective Date* field each day you manually run it.

Process Scheduler Request

User ID CTC_DENGLEHARDT Run Control ID

Server Name Run Date [31](#)
 Recurrence Run Time [Reset to Current Date/Time](#)
 Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Mass Student Group schedule fo	CTC_R255	PSJob	(None)	(None)	Distribution
<input type="checkbox"/>	SCC_STD_GRP	SCC_STD_GRP	Application Engine	Web	TXT	Distribution

[OK](#) [Cancel](#)

Create *Assign* Student Group Run Control IDs (x4)

NAVIGATION: Records and Enrollment > Career and Program Information > Process Student Groups

Navigate to *Process Student Groups* then select **Add a New Value** to create a new Run Control ID for assigning Fall Loan Student Group

Process Student Groups

*Run Control ID

Note: Make sure to put your college, EY or OY (depending on the aid year) and your initials in the Run Control ID. Example even year Run Control ID: WA123_EY_ASSIGN_FLE7_DE

Select the following parameters for the Population Selection:

Selection Tool: PS Query

Query Name: QCS_FA_INCLUDE_LOAN_FEES_TERM

Edit Prompts

Institution: (your college)

Aid Yr: (the aid year i.e. 2024)

Term: (Fall term i.e. 2237)

Group: FLE7 (since we're using the 2024 aid year in this guide)

Process Student Groups

Run Control ID
Report Manager
Process Monitor

Population Selection


☒ Population Selection


Selection Tool


Query Name


Student Group Data

Query Prompts

*Institution 

*Aid Yr 

*Term 




*Group (FLx7, FLx1, FLx3, FLx5) 

Select the following parameters in the *Student Group Data* section

Academic Institution: (your institution)

Student Group: FLE7

Effective Status: Active

Population Selection	
<input checked="" type="checkbox"/> Population Selection	
Selection Tool <input type="text" value="PS Query"/>	Edit Prompts
Query Name <input type="text" value="QCS_FA_INCLUDE_LOAN_FEES_TERM"/>	Launch Query Manager Preview Selection Results
Student Group Data	
*Academic Institution <input type="text" value="WA"/> 	Tacoma CC <input type="checkbox"/> Update Tuition Calc Required
*Student Group <input type="text" value="FLE7"/> 	Financial Aid Loan EY Fall
*Effective Date <input type="text" value="07/19/2023"/> 	
*Effective Status <input type="text" value="Active"/>	
Comment <input type="text"/>	
Student Override	

Note: The *Effective Date* defaults to today's date. You do not have to change the date unless you are running this Run Control ID ad hoc. When you place this Run Control ID in the Loan Fee Budget jobset, there is a process in there that updates the effective date to the current date.

Save your work and note this Run Control ID in Excel or Word so that you can copy and paste it in the jobset.

Create Run Control IDs for each term in the aid year following the same steps but choosing FLE1, FLE3 or FLE5 accordingly. Make sure you've saved all the Run Control IDs and noted them before moving onto the next section.

Additional Info: If you would like to run the Run Control ID before putting it in a jobset, select the option: **Mass Student Group schedule to**. If you select **SCC_STD_GRP** option, the effective date will not be updated by the system to the current date and you will need to manually update the *Effective Date* field each day you manually run it.

Process Scheduler Request

User ID CTC_DENGLEHARDT Run Control ID

Server Name Run Date 07/19/2023 B1

Recurrence Run Time 10:12:50AM Reset to Current Date/Time

Time Zone 🔍

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Mass Student Group schedule fo	CTC_R255	PSJob	(None) ▼	(None) ▼	Distribution
<input type="checkbox"/>	SCC_STD_GRP	SCC_STD_GRP	Application Engine	Web ▼	TXT ▼	Distribution

OK Cancel



Create Assign Budget Flag 'Y' Run Control ID

NAVIGATION: Set Up SACR > System Administration > Utilities > Population Update > Population Update Process

Navigate to *Population Update Process* then select **Add a New Value** to create a new Run Control ID

Population Update Process

Find an Existing Value Add a New Value

*Run Control ID|WA|_|EY_BUDFLAG_Y_LOANGRP_|

Add

Note: Make sure to put your college, EY or OY (depending on the aid year) and your initials in the Run Control ID. Example even year Run Control ID: WA123_EY_BUDFLAG_Y_LOANGRP_DE

Select the following parameters

Record (Table) Name: STNDT_FA_TERM – Student FA Term

Selection Tool: PS Query

Query Name: QCS_FA_SETBUDFLAG_Y_LOAN_GRP

Edit Prompts

Institution: (your college)

Aid Yr: (the aid year i.e. 2024)

Fall Group: FLE7 (since we're using the 2024 aid year in this guide)

Winter Group: FLE1

Spring Group: FLE3

Summer Group: FLE5

Run Control ID WA_EY_BUDFLAG_Y_LOANGRP_ Report Manager Process Monitor Run

Select Record fields for update Find | View All Fir

*Record (Table) Name STDNT_FA_TERM - Student FA Term

Error Reporting Selection

Report Error Messages ☒ Do Not Report Messages ☐ Report All Messages ☐

Population Selection

Selection Tool PS Query Edit Prompts

Query Name QCS_FA_SETBUDFLAG_Y_LOAN_GRP Launch Query Manager Preview Selection Results

Query Prompts

*Institution

Aid Yr 2024

Fall Group (FLx7) FLE7

*Winter Group (FLx1) FLE1

*Spring Group (FLx3) FLE3

*Summer Group (FLx5) FLE5

OK Cancel

Select the following parameters in the *Student Fields to Update* section

Field Name: Budget Required

Field Value: Yes – Budget Assign Required

Run Control ID WA_EY_BUDFLAG_Y_LOANGRP_ Report Manager Process Monitor Run

Select Record fields for update Find | View All Fir

*Record (Table) Name STDNT_FA_TERM - Student FA Term

Error Reporting Selection

Report Error Messages ☒ Do Not Report Messages ☐ Report All Messages ☐

Population Selection

Selection Tool PS Query Edit Prompts

Query Name QCS_FA_SETBUDFLAG_Y_LOAN_GRP Launch Query Manager Preview Selection Results

Select Fields to Update Personalize | Find | View All | First 1 of 1 Last

Field Name	Field Value		
Budget Required	Yes - Budget Assign Required	+	-

Select Attributes to Update









Save your work and note this Run Control ID in Excel or Word so that you can copy and paste it into your ISIR Jobset. All colleges have an empty field in CTCFABUD mini job in the ISIR Jobset.

This Run Control ID will go in the first *SCC_POP_UPD* field of CTCFABUD so if your top field is not blank, move the Run Control IDs down to the next field, keeping the order the Run Control IDs are in. See screenshot.

Job Name: CTCFABUD PSJob

Left | Right

Process List

General Settings	Output Settings	Server Settings	Time Settings	Other Settings	>
Process Name	Description	Process Type	Run Control ID		
SCC_POP_UPD	SCC_POP_UPD	Application Engine	 _EY_BUD:		
SCC_POP_UPD	SCC_POP_UPD	Application Engine	 _EY_BUD:		
SCC_POP_UPD	SCC_POP_UPD	Application Engine			
FAPREQRN	Equation Processor Batch Run	COBOL SQL	 _EY_BUDI		
FAPBDGTS	Stdnt Bdgt Assign - Select	COBOL SQL	 _EY_BUDI		
FAPREQRN	Equation Processor Batch Run	COBOL SQL	 _EY_BUDI		
FAPBDGTF	Stdnt Bdgt Assign - Formulas	COBOL SQL	 _EY_BUDI		
FAPREQRN	Equation Processor Batch Run	COBOL SQL	 _EY_BUDI		

Left pane contents: FA_INBOUND, FAPSAR00, PSQUERY, FAPINCLC, SFA_ATB, SFA_NSLDSUPD, CTCFACKL, CTCFACK2, CTINTLTR, SFA_FAUNTUPD, SFA_FAUNTUPD, FAPTRMU1, FAPTRMU1, SCC_POP_UPD, CTCFABUD, CTC_SNG_PRCS, CTC_SNG_ELG, SFA_SSACCESS, CTCCHICOM

The order of the *SCC_POP_UPD* fields in CTCFABUD needs to be:

SCC_POP_UPD: Loan Budget Set Flag 'Y' Run Control ID

SCC_POP_UPD: Budget Set Flag 'Y' Run Control ID

SCC_POP_UPD: Budget Set Flag ALL 'Y' Run Control ID

Create and Schedule Loan Fee Job

NAVIGATION: PeopleTools > Process Scheduler > Schedule JobSet Definitions

Navigate to *Schedule JobSet Definitions* then select **Add a New Value** to create a new Schedule Name and select Job Name: LOANFEE



Schedule JobSet Definitions

*Schedule Name

*Job Name

Note: Make sure to put your college, EY or OY (depending on the aid year) and your initials in the Schedule Name. Example even year Schedule Name: WA123_EY_LOANFEE_DE

Copy the what's in the *Description* field and paste it in the *Run Control ID* field then select Save

Schedule JobSet Definition

Schedule JobSet Items

Schedule JobSet Requests

Schedule Name

Job Name

Copy From

[JobSet Report](#)
[Process Monitor](#) [Report Manager](#)

Schedule Information

User ID

*Description

*Run Control ID

*Status

*Priority

Time Information

*Begin Date

*Time

*Time Zone

Recurrence Name

Select the **Schedule JobSet Items** tab



[Schedule JobSet Definition](#)
[Schedule JobSet Items](#)
[Schedule JobSet Requests](#)

Schedule Name WA_EY_LOANFEE_
[JobSet Report](#)

Job Name LOANFEE
[Process Monitor](#)
[Report Manager](#)

Job Name LOANFEE
WA220_EY_LOANFEE_DE

Left | Right


WA_EY_LOANFEE_

LOANFEE

Process List

[General Settings](#)
[Output Settings](#)
[Server Settings](#)
[Time Settings](#)
[Other Settings](#)
||>

Process Name	Description	Process Type	Run Control ID
LOANFEE	LOANFEE	PSJob	

Select the **Expand Node** button next to the LOANFEE jobset so that the CTC_R255 mini jobs appear



[Schedule JobSet Definition](#)
[Schedule JobSet Items](#)
[Schedule JobSet Requests](#)

Schedule Name WA_EY_LOANFEE_
[JobSet Report](#)

Job Name LOANFEE
[Process Monitor](#)
[Report Manager](#)

Job Name
WA220_EY_LOANFEE_DE









Left | Right


WA_EY_LOANFEE_

LOANFEE

Process List

[General Settings](#)
[Output Settings](#)
[Server Settings](#)
[Time Settings](#)
[Other Settings](#)
||>

Process Name	Description	Process Type	Run Control ID
LOANFEE	LOANFEE	PSJob	


CTC_R255

CTC_R255

CTC_R255

CTC_R255

CTC_R255

CTC_R255

CTC_R255

CTC_R255

Select the **Expand Node** button next to the first CTC_R255 mini job so that CTC_R255_DT and SCC_STD_GRP appears

[Schedule JobSet Definition](#)
[Schedule JobSet Items](#)
[Schedule JobSet Requests](#)

Schedule Name WA2_EY_LOANFEE_
[JobSet Report](#)

Job Name LOANFEE
[Process Monitor](#)
[Report Manager](#)

Job Name CTC_R255 PSJob

Left | Right

WA2_EY_LOANFEE_
LOANFEE
CTC_R255
CTC_R255_DT
SCC_STD_GRP
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255

Process List

General Settings		Output Settings	Server Settings	Time Settings	Other Settings	▶
Process Name	Description	Process Type	Run Control ID			
CTC_R255_DT	Update EFFDT in Stdnt Grps	Application Engine				
SCC_STD_GRP	SCC_STD_GRP	Application Engine				

Save Notify
Add Update/Display

Paste your Fall Loan Student Group REMOVE Run Control ID in both fields. CTC_R255_DT updates the effective date in the Run Control ID to the current date and SCC_STD_GRP runs the Student Group process

[Schedule JobSet Definition](#)
[Schedule JobSet Items](#)
[Schedule JobSet Requests](#)

Schedule Name WA_EY_LOANFEE_
[JobSet Report](#)

Job Name LOANFEE
[Process Monitor](#)
[Report Manager](#)

Job Name CTC_R255 PSJob

Left | Right

WA_EY_LOANFEE_
LOANFEE
CTC_R255
CTC_R255_DT
SCC_STD_GRP
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255

Process List

General Settings		Output Settings	Server Settings	Time Settings	Other Settings	▶
Process Name	Description	Process Type	Run Control ID			
CTC_R255_DT	Update EFFDT in Stdnt Grps	Application Engine	WA_EY_REM			
SCC_STD_GRP	SCC_STD_GRP	Application Engine	WA_EY_REM			

Move onto the next CTC_R255 by selecting the Expand Node button

New

Schedule JobSet Definition
Schedule JobSet Items
Schedule JobSet Requests

Schedule Name WA_EY_LOANFEE_
JobSet Report
Job Name LOANFEE
Process Monitor
Report Manager
Job Name CTC_R255
PSJob

Left
Right

WA_EY_LOANFEE_
LOANFEE
CTC_R255
CTC_R255_DT
SCC_STD_GRP
CTC_R255
CTC_R255_DT
SCC_STD_GRP
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255
CTC_R255

Process List

General Settings		Output Settings	Server Settings	Time Settings	Other Settings	▶▶
Process Name	Description	Process Type		Run Control ID		
CTC_R255_DT	Update EFFDT in Stdnt Grps	Application Engine		<input type="text"/>		
SCC_STD_GRP	SCC_STD_GRP	Application Engine		<input type="text"/>		

Paste your Winter Loan Student Group REMOVE Run Control ID in both fields.

Continue filling in the Run Control ID fields for each CTC_R255. After putting in the REMOVE Run Controls IDs for each term, proceed on to adding the ASSIGN Run Control IDs on the remaining four CTC_R255 mini jobs.

Save your work!

When you're ready to schedule your jobset, return to the **Schedule JobSet Definition** tab



Loan Fee Jobset Setup Guide

Schedule JobSet Definition | Schedule JobSet Items | Schedule JobSet Requests

Schedule Name WA__EY_LOANFEE_ | JobSet Report
Job Name LOANFEE | Process Monitor | Report Manager

Schedule Information
User ID CTC_DENGLEHARDT
*Description WA__EY_LOANFEE_ | *Status Inactive
*Run Control ID WA__EY_LOANFEE_ | *Priority Medium

Time Information
*Begin Date 07/19/2023 | *Time 12:07:50PM | *Time Zone PST
Recurrence Name | Run Now

Server Information
*Server Run Option Any Server
Primary Server | Operating System

Complete the following parameters in order

Begin Date: (Select or enter today's date or tomorrow's date depending on your ISIR Jobset timeslot)

Time: (30 minutes to an hour before your ISIR Jobset timeslot)

Recurrence Name: (select the recurrence that is 30 minutes to an hour before your ISIR Jobset timeslot)

Status: Active

Select **Save** then go to a different page in PS and come back to the jobset to confirm the recurrence stuck. Sometimes you have to set the recurrence twice.

*Header colleges, at this point (07/25/2023), if you've turned off your Odd Year ISIR Jobset (aid year 2023), you can move your Even Year Jobset (aid year 2024) to the later time of 11PM or 4AM depending on your group.

Institution	Description
WA220	Tacoma CC
WA090	Highline College
WA110	Pierce College
WA080	Bellevue College
WA062	Seattle Central College
WA050	Everett Community College
WA171	Spokane CC
WA100	Green River College
WA190	Columbia Basin College

Recurrence	
M-F at 5pm	New Aid Year
M-F@11:00PM	Current Aid Year



Loan Fee Jobset Setup Guide

WA172	Spokane Falls CC
WA140	Clark College
WA070	Shoreline Community College
WA230	Edmonds College
WA160	Yakima Valley College
WA290	Clover Park Technical College
WA030	Olympic College
WA063	North Seattle College
	South Puget Sound Comm
WA240	College
WA270	Renton Technical College
WA210	Whatcom Community College

Institution	Description
WA064	South Seattle College
WA280	Bates Technical College
WA150	Wenatchee Valley College
WA040	Skagit Valley College
WA250	Bellingham Technical College
	Walla Walla Community
WA200	College
WA130	Lower Columbia College
WA120	Centralia College
WA260	Lake Washington Inst. of Tech.
WA180	Big Bend Community College
WA300	Cascadia College
WA020	Grays Harbor College
WA010	Peninsula College

Recurrence	
M-F@01:00AM	New Year
M-F@04:00AM	Current Year