

Working with FAM Systems

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Financial Aid Management Systems (FAMS)

- **Datatel – Colleague**



- **PeopleSoft – Campus Solutions**



- **PowerFAIDS**



- **Banner**



- **Jenzabar, Empower, CampusVue, Sigma**
- **Homegrown systems**

Setup Steps and Defaults

Each system is configured differently but have similarities:

- **Lender, Guarantor, Servicer and Recipient setup**
- **Award/Fund setup**
- **Financial Aid Processing defaults**
 - **Set at processing level, loan level, or student level**

Certification (School-Initiated) Processing

Each system handles new application processing similarly.

- **School must award student with loan type**
 - **Auto packaging**
 - **Batch process**
 - **Individually**

Certification (School-Initiated) Processing

- **School must complete electronic application**
 - **Populated by defaults**
 - **Lender and guarantor selection**
 - **School application**
 - **Self-service products**
 - **Dummy lender codes**
- **School extracts Commonline file**
 - **New application @1A**

Certification Request (Borrower-Initiated) Processing

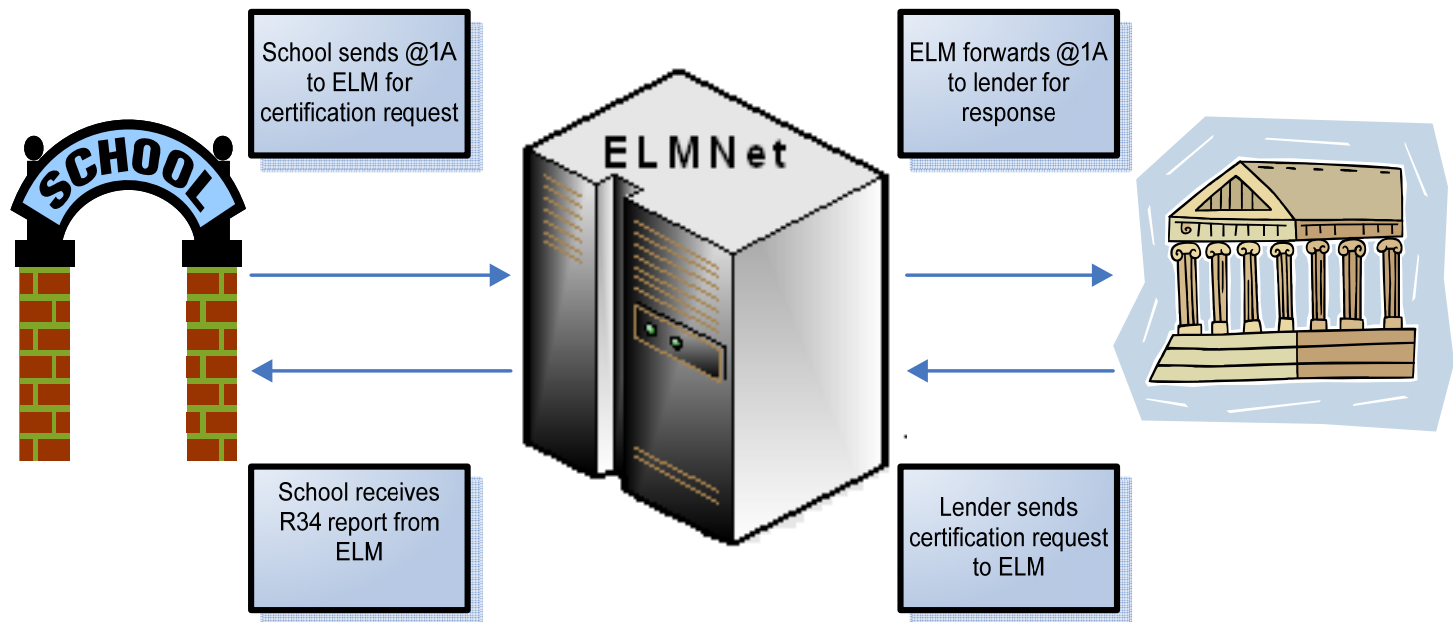
- **Certification request processing within Datatel:**
 - **School awards student with loan**
 - **School loads certification request response file**
 - **System will match certification request to awarded loan by student SSN, loan type, and loan period.**
 - **School is able to send @1C CR record**

Certification Request (Borrower-Initiated) Processing

- **Certification request processing within Banner, PeopleSoft and PowerFAIDS:**
 - **No automatic match of certification request**
 - **School awards student with loan**
 - **School manually changes record and process type for each loan**
 - **School manually changes CLUID on each loan**
 - **School is able to send @1C CR record**

Certification Request (Borrower-Initiated) Processing

How most schools process certification requests with ELM:



Change Transactions

- **Loan record must be in a guarantee status to send change file.**

Pre-Disbursement Changes

Banner
Datatel Colleague
PeopleSoft
PowerFAIDS

Post-Disbursement Changes

Datatel Colleague
PeopleSoft

FAM Supported Formats and Changes

<u>Formats</u>	<u>Datatel</u>	<u>PeopleSoft</u>	<u>PowerFAIDS</u>	<u>Banner</u>
File	4	4;CRC(9.0only)	4	4;5
New Apps	Yes	Yes	Yes	Yes
@1-07	Yes	Yes	Yes	No
@1-08	Yes	Yes	Yes	Yes
@1-09	Yes	Yes	No	Yes
@1-10	Yes	Yes	No	No
@1-11	Yes	Yes	No	No
@1-12	Yes	Yes	No	No
@1-13	Yes*	Yes*	No	Yes*
@1-14	Yes*	Yes*	No	Yes*
@1-19	Yes	Yes	No	No
@1-24	Yes	Yes	No	No
Cert Req	Yes	No	No	No

*Combo Stafford Loans Only

Data Exchange Options for Schools

- **File Transport Protocol (FTP)**
- **Secure FTP (sFTP)**
- **Email (POP3)**
- **ELMWeb**

- **Datatel Secure FFELP Data Exchange**

Datatel and ELM Resources Release Powerful Data Exchange Product

Orlando, FL – November 1, 2006 – Datatel, Inc. and ELM Resources today announced the release of Secure FFELP Data Exchange, a new product for Datatel Colleague®. Developed and configured to work seamlessly with ELM, this product will automate the loan data transfer process. Datatel and ELM are the first companies in higher education to offer an automated loan transfer processing system further reinforcing their positions as leading innovators in the industry. The announcement was made at the Federal Student Aid (FSA) Conference, being held in Orlando, Florida.

- **To use the exchange process, schools must:**
 - **Read release documentation and complete the set up**
 - **Contact their ELM Priority Service Specialist (PSS or RM) for:**
 - **A one-time FTP login and password**
 - **ELM mail directory name**

Responses

- **Requirements**
 - **Guarantee response required for Datatel**
 - **Banner and PowerFAIDS does not require response files to load disbursements**
 - **Guarantee response file is required to produce change transactions**

Responses

- Matching criteria
 - Commonline Unique ID
 - Loan type
 - Alternative program code
- Reporting

```

2005 June 13                               IMPORT ELECTRONIC LOAN FILES                               Page  1
23:22
                                         Importing RESPONSE file AC Release 4

Student ID  SSN      Name                Type  Loan/App Id      Seq/Ord  Year  Messages
-----
0000243     [redacted]  Brown Lucy          LOAN  0099990000E00000301  SUBEL    2005
0000243     [redacted]  Brown Lucy          APP   0099990000E000003    1        2005  Sequence Number already on File
Field Name   CommonLine          Old Colleague      Opt New Colleague
DFR.REQUEST.CODE          Y                    1      Y

LOAN  0099990000E00000501
APP   0099990000E000005                                No Appl found of type: SU
    
```


How they Differ

Datatel

- **Datatel requires a guarantee update before disbursements can be posted**
- **Datatel requires that all loan records have a CLUID sequence number other than 00 for guarantee loans. This number cannot be changed once assigned.**
- **Datatel is sensitive to disbursement dates. Funds cannot be disbursed to student account prior to anticipated disbursement date.**

How they Differ

Banner

- **Schools receive import errors if they ftp file into Banner system using anything other than binary format.**
- **Approved amount reflected on electronic application is guarantee amount and can be tied to rules and cause problems if it differs from current certified amount.**

How they Differ

PeopleSoft

- **School will receive error when updating records if guarantee amount does not agree with awarded amount.**
- **Response to full cancellation of pre-guaranteed loan (@1T) must have all zeroes in amount fields as well as guarantee and approved amount**

How they Differ

Power*FAIDS*

- **Change transactions have to be entered twice, once on the award screen and again on a screen specified for changes**
- **Schools can generate duplicate CLUID's.**

Resources

ELM provides resources to support schools and their system needs:

- **Profiling**
 - **Response types**
 - **Frequency**
- **Mapping**
 - **Guarantee amount**
 - **Field specific**
- **Technical Consultants**

Contact Information

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Thank you!

