

Fall 2022 NCASFAA Conference

October 24-26, 2022
Embassy Suites, Concord, NC

“Being Spooky Since 1966”



PowerFAIDS

Tips and Tricks

Derrick Everhart, Director of Financial Aid
Warren Wilson College

“Work smarter, not harder”

Agenda

- PowerFAIDS helpful resources
- Time saving tips in the Student Module
- Batch Wizard
- Report Writer
- Community tips and tricks
- Q & A

PowerFAIDS Resource Center

- PowerFAIDS training
- Updated user guides
- Subscribe to a PF forum

Tip:

Set up a filter in your email for all PF forum emails

- Subscribe to PF Tech
- Known issues
- Resources:
 - Custom reports
 - Letter templates

CollegeBoard
PowerFAIDS™ Resource Center Derrick Everhart Edit Profile Edit Account Log out

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Quick Links

- COVID-19 Resources
- PowerFAIDS User Guide
- User Guide Appendices
- Training Calendar & Registration Info
- Training Resources
- Meet our Team
- Quick Chat Recordings & Downloads
- CSS Profile/IDOC Users
- Net Price Calculator Resource Center (NPC Users Only)

Helpful Information

- Before You Contact

Welcome to the PowerFAIDS™ Resource Center!

What's New

- PowerFAIDS 28.1 is now available for download on our SFTP site. You must be in production with PowerFAIDS 28.0 before you can upgrade to 28.1. If you are not at 28.0, please complete that upgrade now.

Want to get involved?
Your PowerFAIDS Cloud migration team is looking for users of all skill levels who may be interested in participating in a Migration Focus Group. To learn more, please reach out to Carey Sinclair at csinclair@collegeboard.org.

Check out the 2022 PowerFAIDS User Conference page!
Please visit the conference page for more information.

Technology Announcements

- Microsoft SQL Server 2019 will be supported through the end-of-life of PowerFAIDS Desktop.
- Microsoft ends mainstream support for Microsoft SQL Server 2017 on October 11, 2022. Microsoft SQL Server 2017 will not be supported in PowerFAIDS 29.1.
- PowerFAIDS Support for SQL Server 2016 ended with the PowerFAIDS 26.2 release. Microsoft ended mainstream

PowerFAIDS™ Resource Center Derrick Everhart stream

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Connections

- PF Advisory Group
- Regional Office Locations
- Regional Map
- Contact Us
- Meet the PowerFAIDS Team
- Customer Profile Update Sheet
- College Board Programs and Services
- Financial Aid Links
- Computing Links

PowerFAIDS Forum Information

Join a Forum
Benefit from the expertise, education, and experience of your colleagues who use PowerFAIDS! We maintain two forums for PowerFAIDS users. In addition to having informative discussions with colleagues, when you subscribe you will automatically receive our announcements about PowerFAIDS releases and other current issues.

[Subscribe to PFAIDSFORUM](#)
PFAIDSforum is for financial aid administrators and features discussions of PowerFAIDS functional features and financial aid-related topics.

[Subscribe to PFAIDSTECH](#)
PFAIDSTECH is for information technology personnel who want to discuss issues related to installation, maintenance, network issues, upgrades, and service patches. Financial aid-related issues are not discussed on this list.

Regional Forums & Events

PowerFAIDS™ Resource Center

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Known & Recent Issues



Home and Welcome Screen

- **Welcome text**
Admin – View –Campus info – Basic parameters – Student welcome screen
- **PowerFAIDS modules**
- **My Task Tracker**
- **PowerFAIDS Cloud**
- **What's New**
- **PowerFAIDS User Guide**
- **PowerFAIDS Tech Support**
- **Help**
*Version number
Resource Center
Release notes (current version)*

PowerFAIDS Student - PFAIDS

File Edit View Tools Actions Window Help

Search: > Advanced Grid Selection Set: > 2022-2023 ALL STUDENTS Change

10/10/2022

Welcome Back
Derrick Everhart

[Administration](#)
[Batch Wizard](#)
[Data Integration Tools](#)
[Report Writer](#)
[Security](#)
[System Management](#)

My Task Tracker

To Do: 0
In Progress: 0
[My Task Tracker](#)
[Administrator Task Tracker](#)

PowerFAIDS Cloud


[Learn about PowerFAIDS Cloud](#)

Welcome!

This Weeks Focus:
Reconciliation
Endowment Awarding
Student Communications
FAFSA Complete
Financial Aid Fridays

Financial Aid Friday
Current Week: FAFSA Reminders Halloween Themed
Coming Up: When will my Financial Aid Offer Be Ready?

What's New

PowerFAIDS Cloud Is Coming
Plan now for your move to PowerFAIDS Cloud by requesting a [PowerFAIDS Cloud Consultation](#). The consultation includes a review of the timeline, feature roadmap, and pricing. We look forward to speaking with you and your colleagues.
2023/2024 Parameter Roll Forward Enabled
You can now begin your financial aid processing for the upcoming 2023/2024 award year. Student Migration has also been enabled for the 2023/2024 award year.

Student Communications Mask SSN Parameter
You can now in the Administration>Communication Preferences>Global Preferences for award years 2020/2021 and forward, choose to mask the SSN in fields used in outgoing student communications for PowerFAIDS and Net Partner Student.

And Much More
Read the [PowerFAIDS New Features and Changes](#) to learn about all of the enhancements and corrections included in this release of PowerFAIDS.

PowerFAIDS Help

 **PowerFAIDS Resource Center:**
Visit the [PowerFAIDS Resource Center](#)
Don't have an account?
E-mail us at PFWebmaster@collegeboard.org

PowerFAIDS User Guide:
To view the User Guide in PDF format, [Click Here](#).

Technical Support Help Desk:
E-mail us at pfaidssupport@powerfaids.org
or call toll free at 800-227-6734

PowerFAIDS and PowerFAIDS DEMO



DEMO

Tip:

Always be careful when you are entering data and make sure you are in the correct database!

Session instances for your office

Testing and upgrades

Building out new processes

Testing processing and packaging

Access for work study students

Search Options

Simple

Name, SSN, Alt ID, Wild Card (%)

Search: 123456 >

Record: ⚠ McHooville, Lola

Search: %123 >

Advanced

Search or query

Advanced Search - PFAIDS

Clauses Add Clause Delete Clause

(Dictionary Item	Is	Equal	Constant	Expression)	Connector
	AWARDFND	Is	Equal	Constant	F-PELL		END

Grid

Select information, copy and paste List

Grid Search - PFAIDS

Query Student

SSN	Alternate...	Last Name	First Name	MI	City	State	Zip	Status	IM Dep	FM Dep

Paste Search Clear Search

Selection Set

Saved query or search

Home Print Refresh Mail Mask

Search Results

Simple Adv. Grid

Duplicate Record Search

Tools – Duplicate Record Search

Duplicate Record Search

Duplicate Record Search

Select Query: Duplicate New Students

Search Criteria

Query Name: Duplicate New Students

Comparison Limit		Comparison Limit	
Last Name: <input checked="" type="checkbox"/>	<input type="text" value="10"/> Characters	E-mail Address: <input type="checkbox"/>	<input type="text"/> Characters
First Name: <input checked="" type="checkbox"/>	<input type="text" value="10"/> Characters	Street Address 1: <input type="checkbox"/>	<input type="text"/> Characters
Middle Initial: <input type="checkbox"/>	N/A	Street Address 2: <input type="checkbox"/>	<input type="text"/> Characters
Middle Name: <input type="checkbox"/>	<input type="text"/> Characters	Street Address 3: <input type="checkbox"/>	<input type="text"/> Characters
Preferred Name: <input type="checkbox"/>	<input type="text"/> Characters	City: <input type="checkbox"/>	<input type="text"/> Characters
Date of Birth: <input type="checkbox"/>	N/A	State: <input type="checkbox"/>	N/A
Phone Number: <input type="checkbox"/>	N/A	ZIP Code: <input type="checkbox"/>	N/A

Records Returned by Search

TIPs and TRICKS

Comments

Hover over the  beside a student's name to see comments, double click to go to the student's comments screen

Search: > **Advanced** **Grid** Selection Set: > **2022-2023 ALL STUDENTS** **Change**

Record:  McHooville, Lola SSN: xxx-xx-0005 Alt. ID: 123456 UNK RP 09/07/2022 << < > >>

Student Counts

Tools – Student Counts

Student Counts

Students in Database: 11721

Students this Year / Version: 2445

Students in Working Set: 1

Initial View

Tools – My Settings

My Settings

- Change Password
- Email
- Initial View**
- Security Questions

Initial View

Choose the student record view that you would like to see when you first retrieve a student record.

Initial View:

TIP or TRICK

Mnemonics

Hold your mouse over almost any field to review the mnemonic name, Desc, Table and Column

The screenshot shows a 'Personal Information' form with fields for Name, SSN, Preferred, Prior Name, Alternate ID, Tracking Status, Version, Driver's License, Enrollment Planning Service Code, Hispanic/Latino, and Race. A tooltip is visible over the 'Tracking Status' field, displaying: Mnemonic: ID-ALT, Desc: Alternate Identification Number, Table: student, Column: alternate_id.

Record Creation

Advanced Search – How Create or Award Year Profile – Summary

Advanced Search - PFAIDS

The screenshot displays the 'Advanced Search - PFAIDS' interface. The 'Clauses' section shows a search clause: (HOW-CREATE Is Equal Constant ISIR Load) END. A 'Views' sidebar on the right lists various data categories, with 'Summary' selected. The main area shows summary statistics: Total Resources: 0, Financial Need: Unknown, PowerFAIDS Awards: 18,500, and Unmet Financial Need: Unknown. Below this, the 'Letters' section shows: Last Award Letter: [empty], Total Award Letters: 0, Last Missing Information Letter: 6/27/2022, Initial Missing Information Letter Generated: 6/27/2022, Total Missing Information Letters: 2, Complete Letter Sent: Yes, and Total Number Award Letters: 2. On the far right, there are sections for 'Documents', 'Financial Aid Counselor' (Counselor Name: [empty]), and 'Record Creation' (Date: 1/12/2022, How: Manual, Include in API Record Extract: [empty]).

Shortcut Keys

Found in the PF User Guide

Key or Key Combination	Function
F1	Opens the PDF version of the PowerFAIDS <i>User Guide</i> .
Shift+F1	Displays the Award Year Profile/Personal Profile view.
Shift+F2	Displays the Custom Data view.
Shift+F3	Displays the Communications/Document Details view.
Shift+F4	Displays the Budgets/Institutional view.
Shift+F5	Displays the FM Data/Summary view.
Shift+F6	Displays the IM Data/Summary view.
Shift+F7	Displays the Verification/Tax Forms view.
Shift+F8	Displays the Packaging/Awards Data view.
Shift+F9	Displays the Pell Grant Data/Awards Data view.
Shift+F10	Displays the CommonLine Data/Loans view.
Shift+F11	Displays the Direct Loan Data/Loans view.
Shift+F12	Displays the Student Employment view.

Alt+F1	Displays the History/Award Year Totals view.
Alt+F4	Closes PowerFAIDS.
Ctrl+C	Copies text to the Windows clipboard.
Ctrl+F	Opens the Advanced Search window.
Ctrl+H	Displays the Student module Welcome page.
Ctrl+P	Opens the Print window.
Ctrl+R	Displays the Release Notes.
Ctrl+S	Saves your changes.
Ctrl+V	Pastes text from the Windows clipboard.
Ctrl+W	Displays the Batch Wizard Welcome page.
Ctrl+X	Cuts text and places it on the Windows clipboard.
Ctrl+Y	Opens the Search All Years window.

Custom Data: Column Size and Sort

Sort any custom data column alphabetically by selecting the top column

Click on the margin and drag to desired size

Before

Text (6 characters)	
Name	Value
FA_APPEAL	
RE_CLASS	
Division	Undergraduate
RE_FAFSA_1617	
International	
Major 1	
Major 2	
Agg Loans Rev	
Sch_Appeal	
AD_Merit_GPAXX	
AD_Transfer_GPA	
AD_EAorED	
AD_Entry_Year	2022-2023
AD_Entry_Term	Fall
AD_Cand_Type	First-time Freshman
AD_Counselor	
AD_Citizen	

After

Text (6 characters)	
Name	Value
AD_Cand_Type	First-time Freshman
AD_Citizen	
AD_Counselor	
AD_EAorED	
AD_Entry_Term	Fall
AD_Entry_Year	2022-2023
AD_FAFSA	Will Not File FAFSA
AD_Housing	
AD_Merit_GPAXX	
AD_STAT_1617	
AD_Transfer_GPA	
Agg Loans Rev	
Country NC	

Before

Text (6 characters)		Medium Text (15 characters)	
Name	Value	Name	Value
FA_APPEAL		KHEAA_Don'tSend	
RE_CLASS		KHEAA_ENR_INDC	
Division	Undergraduate	UG-G Program	
RE_FAFSA_1617		UG-G ENRL FALL	
International		UG-G ENRL SPRNG	
Major 1		UG-G ENRL SUM	
Major 2		Academic_Status	
Agg Loans Rev		Work_Status	
Sch_Appeal		Veterans Status	
AD_Merit_GPAXX		Veterans ENRL	
AD_Transfer_GPA		PLUS App	
AD_EAorED		PLUS Amt Req	
AD_Entry_Year			
AD_Entry_Term			
AD_Cand_Type			

After

Text (6 characters)		Medium Text (15 characters)		Long Text (50 characters)	
Name	Value	Name	Value	Name	Value
FA_APPEAL		KHEAA_Don'tSend		SLATE ID	
RE_CLASS		KHEAA_ENR_INDC			
Division	Undergraduate	UG-G Program			
RE_FAFSA_1617		UG-G ENRL FALL			
International		UG-G ENRL SPRNG			
Major 1		UG-G ENRL SUM			
Major 2		Academic_Status			
Agg Loans Rev		Work_Status			
Sch_Appeal		Veterans Status			
AD_Merit_GPAXX		Veterans ENRL			
AD_Transfer_GPA		PLUS App			
AD_EAorED		PLUS Amt Req			
AD_Entry_Year	2022-2023	PLUS Amt PKG			
AD_Entry_Term	Fall	DOM_SA_TRM			
AD_Cand_Type	First-time Freshman	DOM_Study_Away			
AD_Counselor		INT_SA_TRM			
AD_Citizen		INT_Study_Away			
Tuition		CCS_VerifStatus			



Advanced Search Tricks

State Code Lookup

PowerFAIDS state codes use the same schema as COD codes. When looking for a state code, you need to include a space before the code.

Example: Alaska = _Alaska (space) Alberta = A (no space)

Column Chooser

When a grid result report is generated, users can remove and/or re-order the fields on the results grid without exporting.

84 Record(s) Returned by Search

Include	Alternate ID	Last Name	First Name	City	State	Zip	Status	IM Dep	FM Dep
<input checked="" type="checkbox"/>		GRANT	VIVIAN	GREEN BLU...	VA	05494	ID	Dependent	Dependent
<input checked="" type="checkbox"/>		A1demo2_Bra...	St. Alamo123456	Westford	MA	01886	IP		
<input checked="" type="checkbox"/>		AA_Appleseed	Johnny		NY		IP		
<input checked="" type="checkbox"/>	ABAT000041	TINA		Reston	VA	20190	IP		
<input checked="" type="checkbox"/>	ABAT000042	JASON		Reston	VA	20190	IP		
<input checked="" type="checkbox"/>	ABAT000043	KELLY		Reston	VA	20190	IP		
<input checked="" type="checkbox"/>	ABAT000044	PETER		Reston	VA	20190	IP		
<input checked="" type="checkbox"/>	ABAT000045	FRANCESCO		Reston	VA	20190	IP		
<input checked="" type="checkbox"/>	ALLEN 093	ROBERT		GREEN BLU...	VA	05494	IP		
<input checked="" type="checkbox"/>	BISCUITS	BUTTERED		SOUTHSIDE	MS	12345	IP		
<input checked="" type="checkbox"/>	BLACK	MATHEW		GREEN BLU...	VA	05494	IP		
<input checked="" type="checkbox"/>	Board	Ethan					IP	Dependent	

Select All Deselect All

Customization

- MI
- SSN
- Years

- Sort Ascending
- Sort Descending
- Group By This Column
- Show Group By Box
- Hide This Column
- Column Chooser

Advanced Search Tricks continued...

Column swipe to remove any unwanted columns

3 Record(s) Returned by Search

Include	Alternate ID	Last Name	First Name	MI	City	State	Zip	Status	IM Dep	FM Dep
<input checked="" type="checkbox"/>		AMBROSE	ANNA	K	ESTER	AK	99725	IP		Independent
<input checked="" type="checkbox"/>		LASTUFKA	TALLULAH	C	JUNEAU	AK	99801	RP		Dependent
<input checked="" type="checkbox"/>	313009	Otsea	Lily	S	Juneau	AK	99801	DM		

Filter on any column

Alternate ID	Last Name	First Name	MI	City	State	Zip	Status	IM Dep	FM Dep
313009	Otsea	Lily	S	Juneau	AK	99801	DM		

Print preview to export to XLS

3 Record(s) Returned by Advanced Search

File View Background

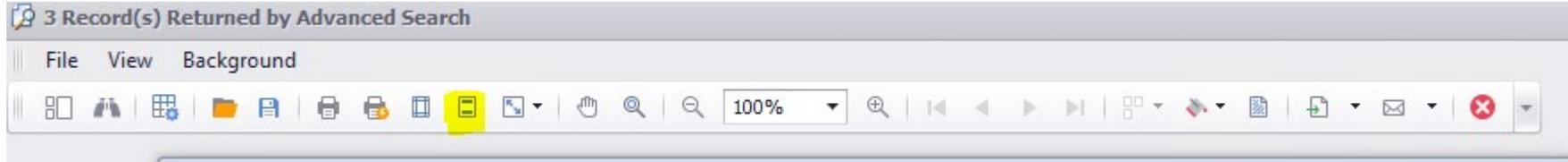
- Page Setup...
- Print...
- Print
- Export Document...
 - PDF File
 - HTML File
 - MHT File
 - RTF File
 - DOCX File
 - XLS File
 - XLSX File
 - CSV File
 - Text File
 - Image File
- Send via E-Mail...
- Exit

3 Record(s) Returned by Advanced Search

First Name	MI	City	State	Zip	Status	IM Dep	FM Dep
Lily	S	Juneau	AK	99801	DM		
TALLULAH	C	JUNEAU	AK	99801	RP		Dependent
ANNA	K	ESTER	AK	99725	IP		Independent

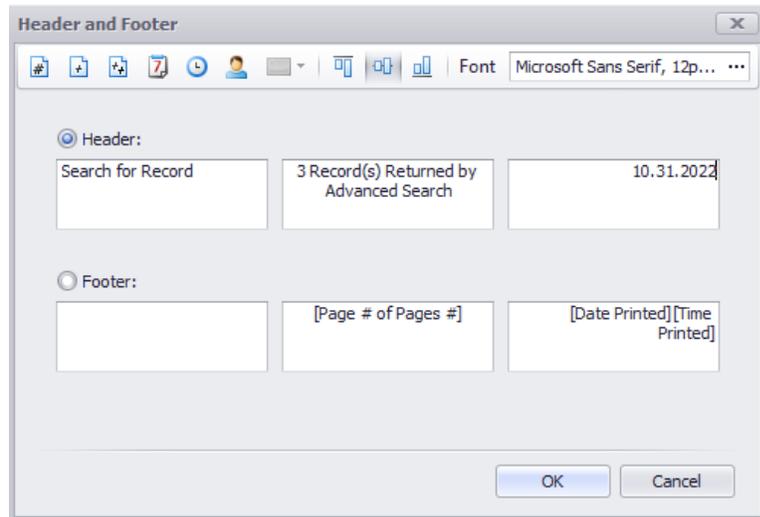
Header and Footer

From any print preview screen in PowerFAIDS



Select the Header and Footer from the Menu

Insert text



Final product ready for printing

Include	Alternate ID	Last Name	First Name	MI	City	State	Zip	Status	IM Dep	FM Dep
<input checked="" type="checkbox"/>	313009	Otsea	Lily	S	Juneau	AK	99801	DM		
<input checked="" type="checkbox"/>		LASTUFKA	TALLULAH	C	JUNEAU	AK	99801	RP		Dependent
<input checked="" type="checkbox"/>		AMBROSE	ANNA	K	ESTER	AK	99725	IP		Independent

Retention Data

Student module – View – Award Year Profile – Retention Data

Customizable fields

Provide a “quick look”

Customer service

Great for new FA employees

FA Office data for counseling students			
Admissions Status	Deposited	Division	Undergraduate
Admissions Status Date	2/27/2018	SAP current status	
AD Candidacy Type	First-time Freshman		Bachelor of Arts
AD Counselor	Brian Liecti	International ?	
AD will they file FAFSA?	Will Not File FAFSA	AD entry year	2018-2019
ISIR EFC	0	AD Entry term	Fall
Selected For Verification	Not Selected	RET orig start year	
Verification Completed	Not Performed	RET orig start term	
Verification sent to KHEAA		Pronoun	She/Her
Verification completed in KHEA		Preferred Name	Skylar
			Undergraduate

Communications: Document Comparison

Student Module: View – Communications – Document Comparison

Compare documents across years in one view

Document Comparison

Document Comparison

Document Name: Status:

Award Year: 2022-2023	Award Year: 2021-2022	Award Year: 2020-2021																																		
<table border="1"><thead><tr><th>Document</th><th>Status</th></tr></thead><tbody><tr><td>DL Entrance Counseling</td><td>Received</td></tr><tr><td>DL Master Promissory Note</td><td>Received</td></tr><tr><td>FAFSA Application</td><td>Not Received</td></tr><tr><td>PLUS Parent Loan MPN</td><td>Received</td></tr></tbody></table>	Document	Status	DL Entrance Counseling	Received	DL Master Promissory Note	Received	FAFSA Application	Not Received	PLUS Parent Loan MPN	Received	<table border="1"><thead><tr><th>Document</th><th>Status</th></tr></thead><tbody><tr><td>DL Entrance Counseling</td><td>Received</td></tr><tr><td>DL Master Promissory Note</td><td>Received</td></tr><tr><td>FAFSA Application</td><td>Received</td></tr><tr><td>PLUS Parent Loan MPN</td><td>Received</td></tr><tr><td>Verification: Complete with KHEAA</td><td>Received</td></tr></tbody></table>	Document	Status	DL Entrance Counseling	Received	DL Master Promissory Note	Received	FAFSA Application	Received	PLUS Parent Loan MPN	Received	Verification: Complete with KHEAA	Received	<table border="1"><thead><tr><th>Document</th><th>Status</th></tr></thead><tbody><tr><td>DL Entrance Counseling</td><td>Received</td></tr><tr><td>DL Master Promissory Note</td><td>Received</td></tr><tr><td>FAFSA Application</td><td>Received</td></tr><tr><td>PLUS Parent Loan MPN</td><td>Received</td></tr><tr><td>Verification: Complete with KHEAA</td><td>Received</td></tr></tbody></table>	Document	Status	DL Entrance Counseling	Received	DL Master Promissory Note	Received	FAFSA Application	Received	PLUS Parent Loan MPN	Received	Verification: Complete with KHEAA	Received
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FAFSA Application	Received																																			
PLUS Parent Loan MPN	Received																																			
Verification: Complete with KHEAA	Received																																			

Tasks

Student module – views – Award year profile - Tasks

My Task Tracker: (View menu)

Administrator Task Tracker: (View menu)

Task Checklist: (student module)

Tasks can be linked to:

- Documents
- Selection sets
- R2T4
- Communications
- Professional Judgement
- Messages

Tasks are helpful!

- ISIR review
- Checking data discrepancies
- Communications
- Document checking and follow up
- Review of student data

Batch or manual processing!

Task Checklist							Add	Delete
Task Name	Date Assigned	Owner	Due Date	Status	Status Date	Lock		
<input type="checkbox"/> Review of Tracking Status RR, DR, PD	4/15/2022	chastings		Complete	4/18/2022	<input type="checkbox"/>		
Owner Group:								
<input type="checkbox"/> FORM: Scholarship Appeal Form	6/22/2022	chastings		Complete	6/28/2022	<input type="checkbox"/>		
Owner Group:								

THE POSSIBILITIES ARE ENDLESS!

Grant and Loan Origination Check

Federal Grant Data

Federal Loan Data

Sub

Unsub

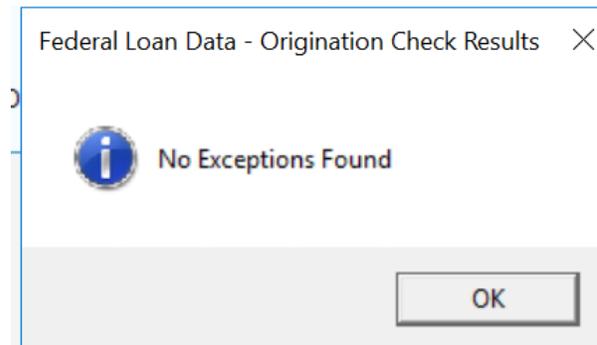
Addl unsub

PLUS

Common Line Loan Data

Loans					View Mismatch	Origination Check
Fund Name	Award Amount	PowerFAIDS/ COD Mismatch	Award Period	Award ID		
+ F-DLSUB	5,500	Not Originated	8/22/2022 - 5/8/2023			
Government ID: Sub FFELP/FDSLPL		Borrower: Student		Estimated: No		
+ F-DLUNS	2,000	Not Originated	8/22/2022 - 5/8/2023			
Government ID: Unsub FFELP/FDSLPL		Borrower: Student		Estimated: No		

TIP: Helps to pinpoint data elements for origination



Disbursement: POE, Award, Summary

Breakdown of awards

See loan with origination fee removed

Total of aid with fees removed

Disbursements by Award		
Awards	Total Scheduled	Total Disbursed
+ M-PRESDT	12,000	6,000
+ M-HONOR	4,000	2,000
+ I-WWCGRNT	7,130	3,565
+ W-WORKCOLL	2,172	140
+ F-DLSUB	3,464	1,732
+ F-DLUNS	1,980	990
+ P-PVTLOAN	12,000	12,000

POEs					View Reported Transactions		
POE	Total Budget	Total Gross Scheduled Awards	Total POE Disbursed Awards	POE Awards Over Budget			
- 2022 FALL	27,333	27,401	26,427	Yes			
Transactions							
Award Name	Estimated	Date	Scheduled Amount	Transaction Amount	Created By	Roster ID	As of Date
I-WWCGRNT	No	10/26/2022	0	--			
W-WORKCOLL	No	9/7/2022	1,086	--			
W-WORKCOLL	No	10/26/2022	0	--			
F-DLSUB	No	9/7/2022	1,732 *	--			
F-DLSUB	No	10/26/2022	0 *	--			
F-DLUNS	No	9/7/2022	990 *	--			
F-DLUNS	No	10/26/2022	0 *	--			
Totals:		27,333	27,373	26,427			



Disbursement Notification: Batch Re-Send

Individual:

Student Module – View – Packaging – Disbursement Summary

Select the checkbox to re-generate the disbursement notification

Batch Processing:

Tools – Batch Wizard - Update Award Data – Select Student Population – Next – Resend Disbursement Notification - Execute

Fund Name	Award Amount	Disbursed Amount	Award ID
<input type="checkbox"/> F-DLSUB	3,500	1,732	xxxxxxxxS23G02979001

Latest Disbursement Transactions							
	Seq #	File Date	Disbursement Date	Disbursed To-Date	Roster ID	As Of Date	
Disbursement 1							
POE: 2022 FALL							
Scheduled	N/A	N/A	9/9/2022	1,750	N/A	N/A	
To Business Office	1	9/9/2022	9/9/2022	1,732	2821	9/9/2022	
From Business Office	1	9/30/2022	9/9/2022	1,732	N/A	N/A	
Disbursement Notification Sent: <input checked="" type="checkbox"/> Yes			Resend Disbursement Notification: <input type="checkbox"/>			Estimated: No	
Disbursement 2							
POE: 2023 SPRING							
Scheduled	N/A	N/A	1/27/2023	1,750	N/A	N/A	
To Business Office							

Batch Wizard - Update Award Data

Choose Award-Level Fields to Update:

Fields and Lock States can be updated independently of each other. Enter a value in the field and/or select a Lock State. Leave the field blank to bypass updating the field; leave the Lock State blank to bypass setting the field lock. To update a locked field, enter a value in the field to update and set the Lock State to Unlocked.

Fields to Update	Lock State
Lock Award: <input type="text"/>	<input type="text"/>
Hold/Release: <input type="text"/>	<input type="text"/>
Award or Loan Period Begin Date: <input type="text"/>	<input type="text"/>
Award or Loan Period End Date: <input type="text"/>	<input type="text"/>
Academic Year Begin Date: <input type="text"/>	<input type="text"/>
Academic Year End Date: <input type="text"/>	<input type="text"/>
MPN Status: <input type="text"/>	<input type="text"/>
Additional Unsub Eligibility: <input type="text"/>	<input type="text"/>
Grade Level: <input type="text"/>	<input type="text"/>
First Time Borrower: <input type="text"/>	<input type="text"/>
Financial Award Create Date: <input type="text"/>	<input type="text"/>
Teacher Expert Indicator: <input type="text"/>	<input type="text"/>
Estimated Award: <input type="text"/>	<input type="text"/>
Award Status: <input type="text"/>	<input type="text"/>

< Back **Next >** Cancel

Batch Wizard - Update Award Data

Choose Disbursement-Level Fields to Update:

Select the disbursement criteria to apply the update to. You can update all disbursements, a specific disbursement, all POEs, a specific POE, or any combination.

Apply update to:

Disbursement Number:

POE:

Fields to Update

Fields and Lock States can be updated independently of each other. Enter a value in the field and/or select a Lock State. Leave the field blank to bypass updating the field; leave the Lock State blank to bypass setting the field lock. To update a locked field, enter a value in the field to update and set the Lock State to Unlocked.

Fields to Update	Lock State
Disbursement Date: <input type="text"/>	<input type="text"/>
Payment Period Start Date: <input type="text"/>	<input type="text"/>
Payment Period End Date: <input type="text"/>	<input type="text"/>
Enrollment Status: <input type="text"/>	<input type="text"/>
Enrollment School Code: <input type="text"/>	<input type="text"/>
CIP Code: <input type="text"/>	<input type="text"/>
Published Program Length: <input type="text"/>	<input type="text"/>
Published Program Type: <input type="text"/>	<input type="text"/>
Program Academic Year in Weeks: <input type="text"/>	<input type="text"/>
Special Programs: <input type="text"/>	<input type="text"/>
Program Credential Level: <input type="text"/>	<input type="text"/>
COD Coronavirus Indicator: <input type="text"/>	<input type="text"/>
Resend Disbursement Notification: <input checked="" type="checkbox"/>	<input type="text"/>
Estimated Disbursement: <input type="text"/>	<input type="text"/>
Distribution Amount Lock: <input type="text"/>	<input type="text"/>

< Back **Next >** Cancel

Common Line Data for Private Loans

Certifying loans

Reconciliations and discrepancies

Reporting

Batch certify

Loans						Origination Check		
Fund Name	Award Amount	Export Status	Date	Loan Period	Loan ID			
<input type="checkbox"/> P-PVTLOAN	9,816	Pending-New Loan		8/22/2022 - 5/8/2023				
Loan Type: Alternative		Borrower: Student		Loan Sequence Number:				
Guarantee Status:				Estimated: No				
Application Details								
Loan Period:	8/22/2022	To	5/8/2023	Disbursements				
Guarantor:	924 Sallie Mae			1	9/7/2022		Hold	Cancel
Lender:	SLM Bank Smart Option Student Loan 900905			2	1/27/2023		<input type="checkbox"/>	<input type="checkbox"/>
Alt Loan Program:	999 Alternative Loan Program Alternative Loan Program			3			<input type="checkbox"/>	<input type="checkbox"/>
Grade Level:	Second Year			4			<input type="checkbox"/>	<input type="checkbox"/>
Certified Amount:	9,816	By:	chastings	Enrollment Status:		Full Time		
Promissory Note:	Multi-Year	Delivery Method:	Web	Cost of Attendance:		53,816		
Grad Date:		Parent:		EFC:		14639		
Amount Requested:	9,816	Loan Debt:		Estimated Aid:		44,000		
Reference Complete:		Signature:		Signature Date:				

Return to Title IV Processing

With a little set up you can process all your R2T4's from PowerFAIDS

All the data in one place

Official R2T4 calculation sheet

Return to Title IV - Calculations

Description	Calc Modified By	Date Modified	Date Completed	Processed	Processed By	Date Processed
-------------	------------------	---------------	----------------	-----------	--------------	----------------

Period Used for Calculation:
 Program Type:
 POE Start Date:

Date of School's Determination that Student Withdraw:
 Send Notification:
 POE End Date:

CARES Act Waiver:
 Display in Communications:
[View POE Details](#)

Step 1 | Step 2 | Steps 3 - 4 | Step 5 | Step 6 - Loans | Step 6 - Grants | Steps 7 - 9 | Step 10 | PWD Tracking Sheet | Repackaging Worksheet | Messages

Step 2: Percentage of Title IV Aid Earned

Period Dates:

Start Date:

Scheduled End Date:

Date of Withdrawal:

Student Withdrew Without Notification:

H. Percentage of payment period or period of enrollment completed:

Divide the calendar days completed in the period by the total calendar days in the period (excluding scheduled breaks of five days or more AND days that the student was on an approved leave of absence).

/ =

Completed Days	Total Days	Percentage Completed
----------------	------------	----------------------

If the percentage completed is less than or equal to 60%, enter the percentage completed into Box H.

If the percentage completed is greater than 60%, enter 100% into Box H.

If the Date of Withdrawal is blank, enter 50% into Box H.

View Scheduled Breaks | View LOAs |

H. %

Display in Communications: [View POE Details](#)

Step 1 | Step 2 | Steps 3 - 4 | Step 5 | Step 6 - Loans | Step 6 - Grants | Steps 7 - 9 | Step 10 | PWD Tracking Sheet | Repackaging Worksheet | Messages

R2T4 Repackaging Worksheet - Return of Funds

P. Total Loans the School Must Return (Step 6):
 Total Grants the School Must Return (Step 6):

Subsidized Direct Loan

Total Net Amount to Return:

Award	POE	Disbursement Number	Date	Packaged Amount	Revise Package Amount
F-DLSUB	2022 FALL	1	09/09/2022	\$2,250	\$0
F-PELL	2022 FALL	1	09/09/2022	\$3,448	\$1,362

Pell Grant

Total Net Amount to Return:

Name: Barrick, Destiny L

Fall 2022 WD 9.14.22

Alternate ID: 314513

Create Date: 10/12/2022

Repackaging Worksheet



Quick Lookup for Data or Processing

Professional Judgement View

- Selection sets
- Document setup
- Comments for follow up
- Status changes
- Link to tasks!

Professional Judgment - Summary Add Delete

Description	Modified By	Modified Date	Status	Status Owner	Status Date
Dependency Override	deverhart	10/17/2022			

Counselor Name: Methodology: Tax Return Year Used: Packaging Modified:

Comment:

History View

- Award year totals
- Yearly comparison
- Quick look for processing dates

Yearly Comparison

Select Award Year:	2022-2023	2021-2022	Data Comparisons
ISIR	ISIR	ISIR	ISIR
Application Received:	Yes	Yes	Match
Tax Year Used:	2020	2019	Mismatch
Dependency Status:	Dep	Dep	Match
9 Month EFC:	28,952	6,275	22,677
Household Size:	5	5	0
Number in College:	1	1	0
Parent AGI:	119,421	73,253	46,168
Student AGI:	Unknown	Unknown	Unknown
Parent Taxes Paid:	5,167	0	5,167
Student Taxes Paid:	Unknown	Unknown	Unknown
FISAP Income:	133,921	73,253	60,668
State Residency:	SC	SC	Match
Parents' Marital Status:	Married/remarri	Married/remarri	Match
Student's Marital Status:	Single	Single	Match
High School Equivalency:	High School Dip	High School Dip	Match

Mnemonics for ALL

Active Sessions

Tools – Administration – View – Campus Info – Basic Parameters – License Session and Parameters

License Session Parameters

Refresh active sessions every: minutes (valid range 1-10) Parameters last changed on: 5/3/2018 9:16:56 AM

Clear expired sessions after: minutes (valid range 3-60)

Inactive sessions are locked after: minutes (valid range 5-30)

Active Sessions

Select All Deselect All Refresh

User	Number	Status	Total Open Applications	Disconnect
<input type="checkbox"/> + deverhart	3	Active	2	<input type="checkbox"/>
<input type="checkbox"/> + rsingleton	2	Locked	1	<input type="checkbox"/>
<input type="checkbox"/> + chastings	1	Active	2	<input type="checkbox"/>

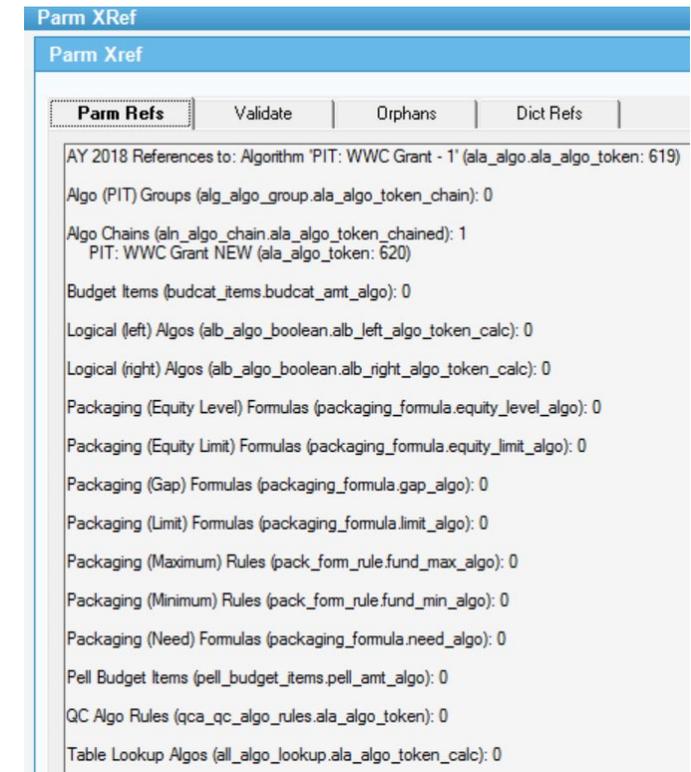
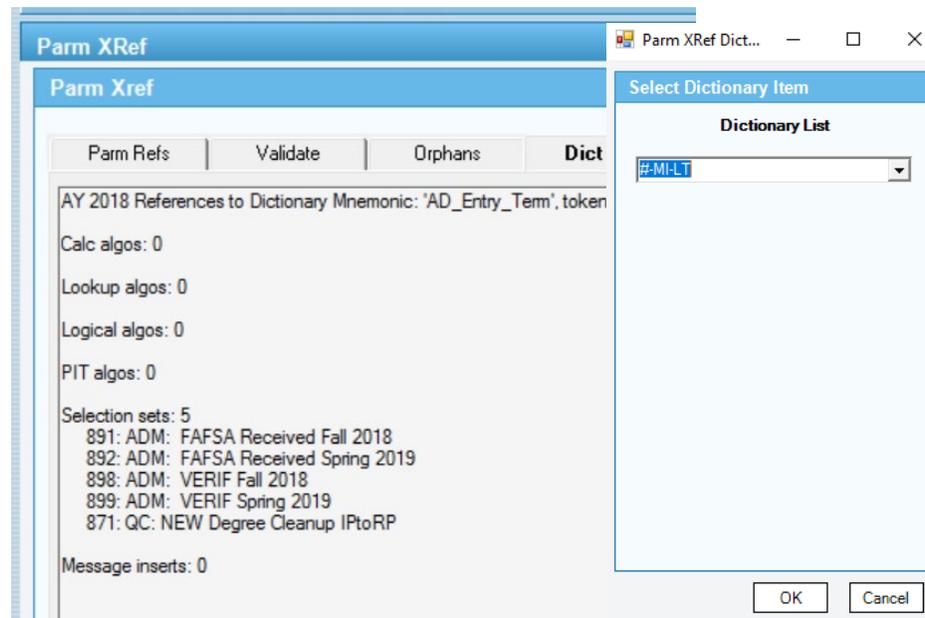
Parm XRef

Utilize the Parm XRef when you need to see where the system is utilizing one of your data points.

This can be selection sets, budget items, funds, documents, packaging formulas, and much more.

Dict Refs: Search any dictionary item!

Tools – Administration – View – Building Blocks – Parm XRef



Batch Wizard: Favorite Time Saving Batch Wizard Processes

TIP: Control W

Reallocate Awards: Increase or decrease awards – great for any reallocation of funds!

Comment Posting: Batch post the same comment on several students at once!

ISIR Printing: Need to print those ISIR's for review or for an auditor? Save time and print all at once!

Document Posting: Quick time saver when you are putting on several documents at once!



Post Field Value: Post any mnemonic or batch update custom data!

POE Update: Update, change, add, or remove data from a POE!

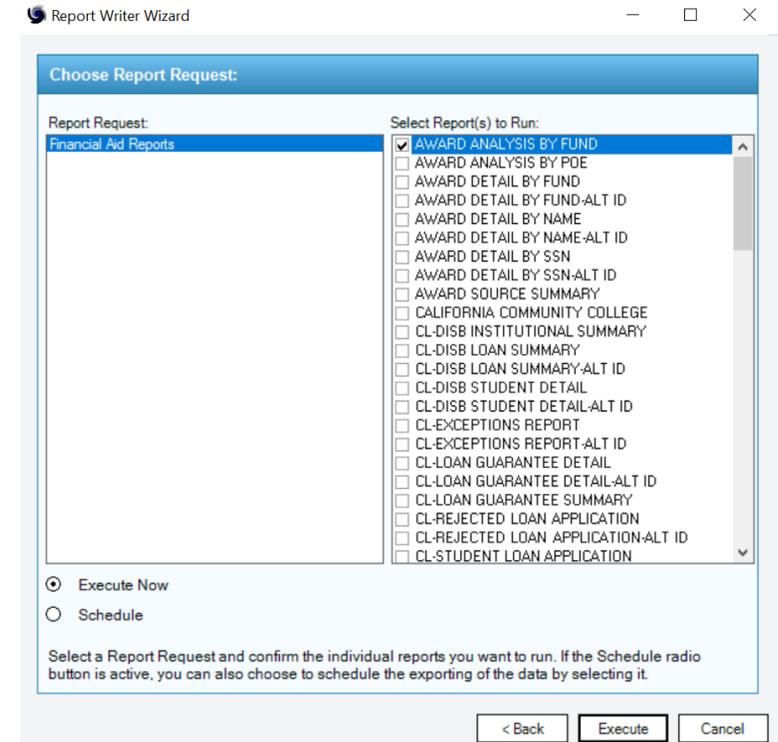
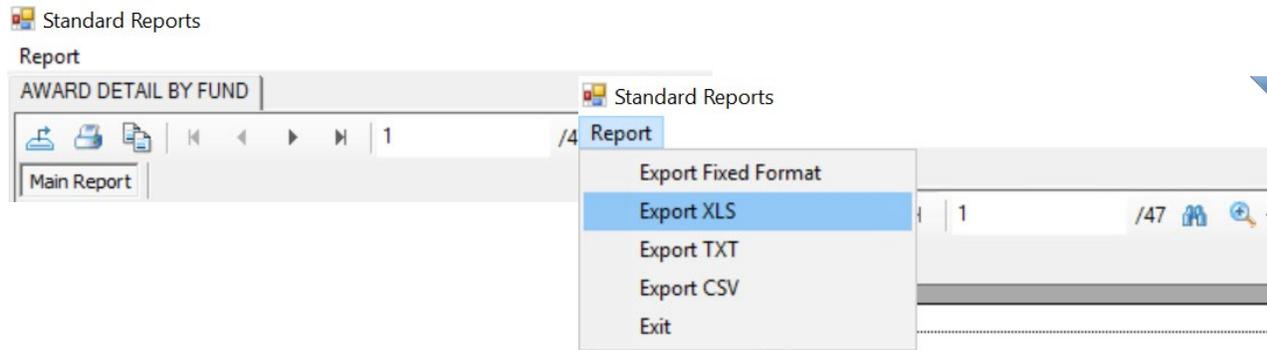
Update Award Data: Update those awards easily and quickly!

Report Writer- Standard Reports

Helpful Reports

- Award Detail by Fund
- Award Detail by Name
- PowerFaids Change Sheet
- Reconciliation Report!

Exporting Reports



Report Writer- Custom Reports

Import and export custom reports

Template report to use as a starting place!

Sort for mnemonic's

Print Column - enter 0 if you do not wish to have data in your report!

Edit Details Where Metrics

Mnemonic	Display Name	Table Name	Column Name	Data Type
#AWD-LET	Number Award Letters	stu_award_year	number_award_letters	N
#-MI-LT	Num Mi Letters Sent	stu_award_year	num_mi_letters_sent	N
#TOT-AWD-LET	Tot Num Award Letters	stu_award_year	tot_num_award_letters	N
%_Need_Metw...	Value 100	user_int	value_100	N
(no mnemonic)	Guar City	guarantor	guar_city	A
(no mnemonic)	Guar Contact	guarantor	guar_contact	A
(no mnemonic)	Guar Id	guarantor	guar_id	A

Column Specification

Report ID: (CLONED)

Column: disbursed_amt

Heading: PowerFAIDS

Disbursed

Amount

Alignment: Right

Format: Custom ###,###0

Summation Type: Sum

Length: 12

Data Type: Numeric

OK Cancel

Report Columns View Joins More Add Remove

Display Name	Print	Sort	Group	Mnemonic	Table	Column
Fund Gov Id	0	0	0	(no mnemonic)	funds	fund_gov_id
Fund Short Name	0	0	0	(no mnemonic)	funds	fund_short_name
Student Ssn	10	0	0	SSNO	student	student_ssn
Last Name	20	10	0	NAME-L	student	last_name
First Name	30	20	0	NAME-F	student	first_name

Questions?

What are some tips and tricks you would like to share?

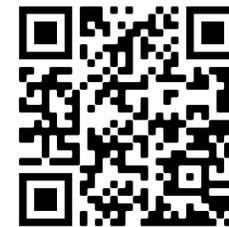
Thank You

Session: PowerFAIDS

Tips and Tricks

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Platinum Level Supporters



Gold Level Supporters



Silver Level Professional Affiliates



Bronze Level Professional Affiliates

ECMC