

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

Processing Student Packaging and Award Letters		FA.015.02
Effective	8.5.2022	
Last Revision/Review	5.23.2023	

1. Purpose

To ensure that matriculated students who have financial aid (scholarships, loans, waivers, or any other estimated financial assistance) receive offer/award letters every term to ensure that the student is aware of their financial aid offers and awards.

2. Related Policy/Authority

Office of Financial Aid

3. Faculty/Staff Responsibilities

Director of Financial Aid- Runs the award letter process to ensure division of duties for audit trail reports. Director has final review and verification of award letter process.

Financial Aid Advisor- Ensures that all students that had any type of financial aid posted has an award/offer letter posted to their Document Tracking screen on SIS. They are also responsible for notifying the Director of any issues in the award/offer letter process.

4. Definitions/Abbreviations

SIS – Student Information Management System

5. Procedural Steps

Packaging Financial Aid

In SIS Enterprise > Financial Aid > Packaging

Multiple packaging

1. Click the academic year to package
2. Enter your criteria
3. Initiate to obtain the students that match that criteria
4. Click packaging tab and enter your criteria
5. Click “Get awards”
6. Reports/Import to award on financial aid maintenance

Single packaging

1. Financial Aid
2. Packaging
3. Single

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4. Click correct academic year and financial aid year
5. Package as load = full time
6. Direct Cost type = choose any selection
7. Do not click “update existing status record”
8. For each award type the Client will be packaging, click the transdoc and click “load from calendar”
9. Once all award types have been added click on the “Package” tab
10. Find the student to package
11. Add Option=Award Type
12. Award type = select the award you would like to package
13. Total amount = enter yearly amount
14. Click add
15. Once all award has been added, click “Process”
16. The awards will be distributed to the financial aid maintenance status bar

Award Letter – SIS Custom Reporting Services- SSRS report

1. Financial Aid to Award Letter
 - a. Select Financial Aid Year
 - b. Expected Entrance Term
 - i. Select all will capture all classes
 - ii. Select a specific year the student entered if you are looking
 - c. Student IDS (optional)
 - i. If looking for one award letter or need to a specific award letter, include Student IDS, ex.0000012312
 - d. Revised Only
 - i. Yes- Selects only students whose award letter has been revised with a change in their award for the academic year
 - ii. No- Selects all students with any type of financial aid, loan, scholarships, military awards
 - e. Student UIDs
 - i. (Select All) – selecting all students on the drop-down list (if there are any doubts, please select all. Worst-case scenario, students will receive a duplicate award letter.
 - ii. None – selecting None makes it possible to select only one student
 - iii. Select student(s) from drop down
 - f. Create Document- Defaults to False-
 - i. True – create document to email to student
 1. Can also be used to print or image the document for a student
 - ii. False- review
 - g. Sendmail- Defaults to False
 - i. True – sends email to student
 - ii. False-Review
 - h. Export file and add to Title IV folder, Title IV > SIS Reports > Award Letters > Appropriate AY, ex: 2022-2023
 - i. Add date to report, year-month-day

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2. Financial Aid Audit Report
 - a. Run and save Financial Aid Audit Report at Title IV > SIS Reports > Award Letters > Appropriate AY > Financial Aid Audit Report
 - i. Verify Award Letter Insert Time
 - ii. Verify Award User ID (Script)
 - b. Rerun individual students that do not have an Award Letter Insert Time and Award Letter Fin Aid Year ID
3. Check financialaid@burrell.edu, Award/Notification Letters to verify whether any students' emails were rejected
4. Award Letters
5. Report Format – (Create crystal report that displays needed information)
6. Enter the terms to and from
7. Select the student
8. Reports tab
9. Address tab=home
10. Click print

Verifying Student Award/Offer Letters Dissemination

1. In SIS run and verify the number of DocTrans- FA-Misc. Award Letter Information (DocTracking Report)
2. In SIS run and verify the number of distinct students has an award, SIS > BYOR > Student Criteria (term) > Run Report- Summary by Student by Award
3. Compare the DocTrans Report (number of distinct students that received an award) and ensure that a minimum of distinct student have a FA- Misc. Award Letter Information
4. In *BCOM Custom Reporting Services* (SSRS reports) and run Financial Aid Audit Report. Identify Award Letter Insert Time, check for blanks. If a student has a blank, please image an award letter to the student's SIS Financial Aid docs as FA-Misc Award Letter Information for the date that it is inserted.
5. Financial Aid Advisor completes the flow form to notify Director that the review is complete with the reports reviewed and numbers retrieved.
6. Director of Financial Aid archives all reports and information as a final review of processed award letters

6. Reports/Charts/Forms/Attachments/Cross References

7. Maintenance

Identify if the organizational unit/staff who developed the procedure; when it will be reviewed and updated.

Developed and updated by -Director of Financial Aid

8. Signature

Approved by

Department Head of Financial Aid

5.23.2023

Date

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9. Distribution List

Internal- Office of Financial Aid

10. Revision History

Revision Date	Subsection #	Summary of Changes	New/Cancellation/ Replacement Procedure? (if applicable)	Approval Date
08/1/2018		Updated codes by Terms	New	8-1-2018
08/02/2022		Added Verification Process	New	8.5.2022
05/17/2023	4	Added definition for SIS, updated CAMS to SIS		5.23.2023