

PeopleSoft Training: Financial Aid Release 9.0

Course (4 Days)

In this four-day class, participants learn how to define the Aid Year structure to comply with federal guidelines. Academic structure is reviewed to determine the components that impact financial aid processing. Aid Year activation for individual students is covered, as well as the Population Selection batch process. The loading and correction of ISIRs will be reviewed. Participants will learn how to build FA term data for single students or for a group, which allows FA staff to make changes without impacting Student Records. Budgets will be created to calculate the COA (cost of attendance). The instructor will review Financial Aid Item Types, which represent the transaction details for FA and Student Financials. Participants will discuss packaging plans to award aid, disbursement plans, and rules to determine how and when aid is received and how to use self-service to allow students to view and accept FA awards. Equation Engine will be reviewed for both selecting students for packaging and adjusting award amounts. External awards (aid from outside sources) will be shown for both self-service and online administrative pages.

Day 1

- Introduction to PeopleSoft Financial Aid
- Financial Aid Year Setup
- Performing the ISIR Load Process
- Processing ISIR Corrections

Day 2

- Financial Aid Term Setup
- Creating Student Budgets
- Financial Aid Item Types
- Disbursement Plans

Day 3

- Defining Packaging Plans
- Equation Engine
- Financial Aid Packaging

Day 4

- External Awards
- Financial Aid Self Service
- Disbursement Rules
- Financial Aid Disbursement

Excerpts from Student Evaluations

The instructor was the best instructor I have ever had. Thank you for a great class!

The documentation is fantastic!

Excellent!! Loved those cheat sheets.

Excellent course. It was definitely more meaningful to work with our own system and data.

Excellent learning experience (the best among all PeopleTools classes that I have taken)!

The training material was extremely helpful. It was easy to follow and was a great tool in the learning process. I can see using it on a regular basis until I feel confident that I fully understand the process.

You have been doing a wonderful job with these courses. Thank you for your knowledge, patience & flexibility.

He is an excellent teacher, very knowledgeable about the course and material. He even keeps the class interested in the subject.

Very responsive to questions; good, relaxed teaching style.

The book is awesome – the class was very valuable! Thanks.

Very good class...materials are well prepared and class is very organized and planned out.

Very effective instructing style. Made class fun and interesting.

Great presentation style. Responsive to student questions. Thanks.

Good class. Very helpful and effective. This is one of the best instructors that I had.

Excellent teacher and well-organized class. I really enjoyed the class and look forward to the next class.

Course was great, reinforced things I kind of know but was not sure about. Speed of course was good.

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- Strategic Planning
- Project Management
- Business Process Reengineering
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Io Consulting's expert level trainers and consultants have first-hand experience with Higher Education and IT business practices as well as in-depth knowledge of the Oracle|PeopleSoft applications and Fusion Middleware technologies.

An Oracle Certified Partner, Io Consulting has successfully led a variety of projects and trainings for both private and public institutions as well as for statewide system efforts. Io's customer list includes The Ohio State University, Duke University, The California State University System, Pepperdine University, and the University System of Maryland.

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