

GFS Exception Reporting

New Tools to find exceptions more easily

GFS Users Forum, November 1, 2007

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Objectives

- Learn about the development of GFS Exception Reports and Job Aids
- Learn how to use GFS Exception Reports to:
 - ✓ review information about students who have completed and approved aid lines in GFS
 - ✓ identify potential exceptions and policy issues with aid that's been awarded to students in your school, or department

Exception Reporting in GFS

- Since GFS first went live in PeopleSoft there has been a recognized need for an easier way to find “exceptions”
- Began working with developers 18 months ago to identify situations where reports are needed and a format for the reports
- Thanks to all who have had a part:

Al Murray	Olgalydia Urbano-Winegar
Ann George	Priscilla Fiden
Kelly Wright	Roni Holeton
Lola Enriquez	Sally Gressens
Nancy Aguilar	Valerie Kiszka

GFS Exception Reporting Overview

- Goal has been to create a tool to help you do your job more easily; not to create new work for you
- Each department manages the work load in their own way; reports need to be flexible
- Accessible to all with GFS access; most helpful to Home Department Approvers
- The new reports don't do everything: ReportMart1 Reports are still available for searching by PTA, Originator, Acad Org

Job Aid Available

- Use “PeopleSoft Learning Center” for all GFS Manuals and Job Aids
- http://www.stanford.edu/services/peoplesoft/student_admin_jobaids.html

Graduate Financial Support

[GFS Exception Reporting \(NEW - October 2007\)](#)

[GFS Disbursement Overrides](#)

[Find Item Type by Old Account](#)

[Entering GFS Aid for Visiting Researchers](#)

[Entering an Assistantship Using Alternate Start/Stop Dates](#)

[Entering a Summer Assistantship for Less Than 12 Weeks](#)

[GFS Workflow Approvers Job Aid](#)

[GFS WF Originators Job Aid](#)

[Worklist Manager for GFS Approvers](#)

Using the GFS Exception Reports

PeopleSoft.

[Home](#) > [STF Grad Financial Support](#) > [STF Graduate Financial Support](#) > **Report**

The screenshot shows the PeopleSoft interface. On the left, there is a navigation menu with the following items: STF Graduate Financial Support (expanded), and Stf Request Item Type. In the center, there is a sub-menu with the following items: Use, Setup, Inquire, Process, and Report (selected). On the right, there is a search bar and a link labeled STF GFS Exception Reporting, which is being pointed to by a mouse cursor.

- Navigate to GFS > Report > STF GFS Exception Reporting
- Reports are refreshed nightly

There Are Twelve Reports

STF GFS Exception Reporting

Find an Existing Value

Aid Year:

Exception:

Aid Entered but not Term Activ
Ast hrs=16hrs/term or Tot>20
Disbursement Sequence Override
Enrolled with < 8 Units
Foreign Students > 20 Hrs
Home Org<=>Term activation
No units enrolled
TAL Awd<=>TAL Rate, Amt Ovr
TAL Cat<=>Billing Car Tut grp
TAL without Assistantship
Tut Mismatch-Billed and Paid
US Studs > 8 Hrs in Payroll

Term:

School Code:

GFS Home Department:

Exception Status:

You can be specific about the population you are interested in searching for:

STF GFS Exception Reporting

Find an Existing Value

Aid Year:

Exception:
Aid Entered but not Term Activ

Term:

School Code:

GFS Home Department:

Exception Status:

[Basic Search](#)

You are presented with a list of all students who met the criteria entered on the Search Page

STF GFS Exception Reporting

Exception: Aid Entered but not Term Activ **Exception Status:** All Exceptions

Aid Year: 2008 **Term:** 1082 2007-2008 Autumn **GFS Home Dept:** RESEARCH

School Code: PROVOST Provost

Total number of students: 1 [Generate Report](#)

Exception Data					
Student ID	Name	Last Disbursement Date	Program Action	Action Date	Fell
		09/14/2007 3:12:50PM	DISC	07/13/2005	

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#)

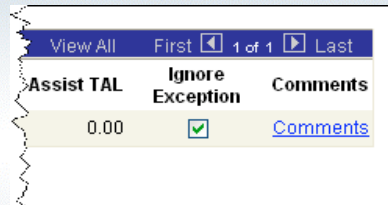
Scrolling to the right...

ACH

View All First ◀ 1 of 1 ▶ Last					
Student ID	Fellowship Stipend	Fellowship Tuition	Assist Salary	Assist TAL	Ignore Exception
3/2005	0.00	2760.00	0.00	0.00	<input type="checkbox"/>

“Allow Exception” and making notes

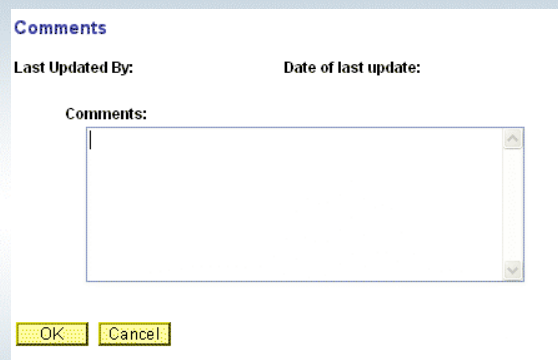
- There are some situations in which something that is an “error” that must be fixed for one student may be acceptable for another student
- There are other situations in which University Policy must be followed
- This function will be especially useful for departments where more than one individual will be using these reports



Assist TAL	Ignore Exception	Comments
0.00	<input checked="" type="checkbox"/>	Comments

Comments link allows you to save notes

- Checkmarks and comments are saved as long as the underlying data hasn't changed
- If a piece of information changes for the student you must review again
- “Allow Exceptions” allows you to filter those previously reviewed out of the report



Comments

Last Updated By: _____ Date of last update: _____

Comments:

OK Cancel

Generate Report Allows Download to Excel

STF GFS Exception Reporting

Exception: Aid Entered but not Term Activ Status: All Exceptions

Aid Year: 2007 Term: 1072 2006-2007 Autumn Acad Org: BIOENGR

School Code: ENGINEER School of Engineering

Total number of students: 1

[Generate Report](#)

- For use by those who want to further manipulate the data
- Also useful for saving “snapshot” of status at any given point in time

https://axessuat-adm.stanford.edu:7800/ps2_uat_adm/psft/V-488514831/Exception_Report_2007_1072_ - Micros...

File Edit View Insert Format Tools Data Go To Favorites Help

Back Forward Stop Refresh Home Search Favorites

Address https://axessuat-adm.stanford.edu:7800/ps2_uat_adm/psft/V-488514831/Exception_Report_2007_1072_04_COOPERK_0325214744.csv

Links ASINFO Authority Axess College Board Comcast Connect FAO Google HelpSU MyApps

	A	B	C	D	E	F	G	H	I	J	K	L
1	Exception report of Salary in GFS and student not term activated and the aid for term that the student is not Term Activated.											
2												
3	Aid Year	2007	Term	1072	School Co	ENGINEER	Home Org:	BIOENGR	Operator	ICCOOPERK		
4												
5	Name	Student ID	Program A	Action Dat	Fellowship	Fellowship	Assist Sal	Assist T	ALLast Disbu	Exception	Comments	Entered
6	Stanford, L	5280522	COMP	6/21/2006	7203	1990	0	0	2006-09-15-20	49.45	000000	
7												
8												

- Clicking “Generate Report” causes an unformatted excel spreadsheet to open in a new window
- It’s not pretty, BUT, you can format, sort and save the report as you wish

The Twelve Reports...

1. Aid Entered but not Term Activated

- Students will appear when:
 - Aid completed/approved but student not term activated.
 - Examples: Student has unexpectedly taken leave of absence, withdrawn or never enrolled so have been cancelled.
- Basic information about the student's aid is presented to allow you to review the student's situation quickly.
- Examples of actions you may need to take include cancelling an assistantship salary before the first payroll date or setting aid lines back to pending (remember Commitments!).
- Once aid has been cancelled or the student's academic records have been straightened out the student will no longer appear on this report.

STF GFS Exception Reporting

Exception: Aid Entered but not Term Activ Exception Status: All Exceptions

Aid Year: 2008 Term: 1082 2007-2008 Autumn GFS Home Dept: RESEARCH

School Code: PROVOST Provost

Total number of students: 1 [Generate Report](#)

Exception Data					
Student ID	Name	Last Disbursement Date	Program Action	Action Date	Fell
		09/14/2007 3:12:50PM	DISC	07/13/2005	

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#)

View All First 1 of 1 Last					
Term	Fellowship Stipend	Fellowship Tuition	Assist Salary	Assist TAL	Ignore Exception
3/2005	0.00	2760.00	0.00	0.00	<input type="checkbox"/>

2. Total Assistantship Hours equal 16 per term or are greater than 20

- Alerts you to potential policy conflicts
- Students with total hours per term (non-summer) equal to 16 or total hours per term (non-summer) greater than 20 hours are included in this report.
- Basic information from the student's aid entry data is included.
- For the specific policy, refer to Administrative Guide Memo 24.2, section 6b (http://adminguide.stanford.edu/24_2.pdf).

Exception: Ast hrs=16hrs/term or Tot>20 Exception Status: All Exceptions

Aid Year: 2008 Term: 1082 2007-2008 Autumn GFS Home Dept: ENGLISH

School Code: HUMSCI Humanities & Sciences

Total number of students: 1 [Generate Report](#)

Exception Data		Assistanship Lines			Ignore Exception
Student ID	Name	Aid Seq	Standard Hours	Ident	Pay Org
[REDACTED]		AST001	16.00	WIM	PAAA

3. Disbursement Sequence Override

- Displays basic information about disbursement overrides that have been granted for a specific term.
- Home Department Approvers are responsible for entering disbursement overrides at STF Graduate Financial Support > Use > Disbursement Aid Seq Override.
- This report will be helpful to Home Department Approvers wanting to verify that overrides have been entered appropriately.

Exception: Disbursement Sequence Override **Exception Status:** All Exceptions
Aid Year: 2007 **Term:** 1072 2006-2007 Autumn **GFS Home Dept:** EDUCATION
School Code: EDUCATION School of Education
Total number of students: 3 [Generate Report](#)

Exception Data							
Student ID	Name	Aid Sequence	Ident	Originator ID	Pay Org	Operator ID	Ignore Exception
██████	██████████	STP001	Travel-Post Cand	05128469	TFAA	██████	<input type="checkbox"/>
██████	██████████	STP001	Travel-Postcard	05128469	TFAA	██████	<input type="checkbox"/>
██████	██████████	STP001	Health Sub Ast Full		ZZUM	██████	<input type="checkbox"/>
██████	██████████	TAL001	Barron-MacArthur	05128469	TFAA	██████	<input type="checkbox"/>

4. Enrolled with Less Than 8 Units

- Lists students with completed/approved aid lines who are enrolled for at least one unit, but in less than 8 units for a specific term (excluding Visiting Researcher.)
- Aid lines that have a Disbursement Sequence Override have been excluded. The aid lines displayed have not disbursed. (Remember Commitments!)

Exception: Enrolled with < 8 Units Exception Status: All Exceptions
Aid Year: 2007 Term: 1072 2006-2007 Autumn GFS Home Dept: AEROASTRO
School Code: ENGINEER School of Engineering
Total number of students: 2 [Generate Report](#)

Exception Data								View All	First	1-2 of 2	Last
Student ID	Name	Tuition Group	Units by Career	Fellowship Stipend	Fellowship Tuition	Assist Salary	Assist TAL	Ignore Exception			
██████	██████████████████	ENG_GRAD	4.000	7578.00	7620.00	0.00	0.00	<input type="checkbox"/>			
██████	██████████████████	ENG_UB	6.000	328.00	0.00	6552.00	4572.00	<input type="checkbox"/>			

5. Foreign Students Greater Than 20 Hours

- Identifies international students who are working more than 20 hours per week based on Payroll data.
- The student's Visa does not allow for employment more than 20 hours per week.

Exception: Foreign Students > 20 Hrs **Exception Status:** All Exceptions
Aid Year: 2008 **Term:** 1082 2007-2008 Autumn **GFS Home Dept:** APPLPHYSIC
School Code: HUMSCI Humanities & Sciences
Total number of students: 2 [Generate Report](#)

Exception Data						
Student ID	Name	Visa/Permit Type	Visa Expiration Date	Job Begin Date	Termination Date	Last Paycheck Date
		J1	08/31/2003	12/16/2003		10/19/2007
		F1		09/04/2006		10/19/2007

View All First ◀ 1-2 of 2 ▶ Last				
Last Paycheck Date	Hours Worked	Payroll Hours	Assistantship Hours	Ignore Exception
10/19/2007	28.00	8.00	20.00	<input type="checkbox"/>
10/19/2007	25.00	5.00	20.00	<input type="checkbox"/>

6. Home Org Not Equal Term Activation

- Identifies students whose Home Org on Aid Year Activation does not agree with data in the student's record.
- Shows potential mismatches.

Exception: Home Org↔Term activation Exception Status: All Exceptions

Aid Year: 2007 Term: 1072 2006-2007 Autumn **GFS Home Dept: ECONOMICS**

School Code: HUMSCI Humanities & Sciences

Total number of students: 1 [Generate Report](#)

Exception Data									View All	First	1 of 1	Last
Student ID	Name	TAL Category	Academic Career	Academic Program	Academic Plan	Academic Org	Dual Degree Indicator	Ignore Exception				
██████	██████████	GR	GR	PHYS	PHYS-PHD	PHYSICS	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

- Students with multiple programs may show up. The Dual Career check-box will indicate it is a multiple career student.
- In the example above, this student has been Aid Year Activated with home department Economics. However, the student's records indicate he is a Physics Phd. The Dual Degree indicator is checked so there may be nothing to resolve, but the information is presented for your review.

7. No Units Enrolled

- List of students with completed/approved aid lines, who are not enrolled (0 FA units).
- Unless an aid disbursement sequence override has been entered, stipend, tuition and TAL will not disburse.
- Salary information, however, will be passed to payroll.
- Those with override already not included.
- Remember Commitments!

Exception: No units enrolled Exception Status: All Exceptions

Aid Year: 2008 Term: 1082 2007-2008 Autumn GFS Home Dept: CASA

School Code: HUMSCI Humanities & Sciences

Total number of students: 3 [Generate Report](#)

Exception Data					
Student ID	Name	Email Address	Program Action	Action Date	Fellowship Stipend
		@stanford.edu	DATA	08/12/2004	17809
		@stanford.edu	DEIN	04/03/2006	11682
		@stanford.edu	DATA	08/12/2004	13357

View All First ◀ 1-3 of 3 ▶ Last					
Enrollment	Fellowship Stipend	Fellowship Tuition	Assist Salary	Assist TAL	Ignore Exception
8/2004	17809.00	0.00	0.00	0.00	<input type="checkbox"/>
9/2006	11682.00	0.00	0.00	0.00	<input type="checkbox"/>
8/2004	13357.00	0.00	0.00	0.00	<input type="checkbox"/>

8. TAL Award Not Equal to TAL Rate, Amount Override

- Lists students whose TAL award has been overridden and is no longer equal to the TAL Rate per their TAL Category

Exception: TAL Awd<->TAL Rate, Amt Ovr **Exception Status:** All Exceptions
Aid Year: 2007 **Term:** 1072 2006-2007 Autumn **GFS Home Dept:** AEROASTRO
School Code: ENGINEER School of Engineering
Total number of students: 2 [Generate Report](#)

Exception Data						
Student ID	Name	TAL Category ID	Originator	Program Action	Action Date	TAL Action Reason
[REDACTED]	[REDACTED]	ENGR	[REDACTED]	DATA	07/15/2005	Tuition support from other Src
[REDACTED]	[REDACTED]	ENGR	[REDACTED]	DATA	07/15/2005	Reduced for unit adjustment

View All First < 1-2 of 2 > Last							
Fellowship Tuition Lines				Assistantship Hours	TAL Default Amt	Amended TAL Amount	Ignore Exception
Aid Seq	Fellowship Tuition	Ident	Pay Org				
TUT002	2667.00	NSF SUPP	ZZYA				
TUT003	2328.00	NSF SUPP	RAAA	4.00	1524.00	0.00	<input type="checkbox"/>
TUT004	2625.00	NSF	FAAA				
No corresponding data available.				20.00	7620.00	4572.00	<input type="checkbox"/>

9. TAL Category Not Equal to Billing Career Tuition Group

- This report identifies students who have potentially been over or under awarded tuition.
- Listed students have been assigned a TAL category on aid year activation which does not match the billing career/tuition group from Term Activation.

Exception: TAL Cat=>Billing Car Tut grp Exception Status: All Exceptions
Aid Year: 2007 Term: 1072 2006-2007 Autumn GFS Home Dept: GEOPHYSICS
School Code: EARTHSCI School of Earth Sciences
Total number of students: 2 [Generate Report](#)

Exception Data									View All	First	1-2 of 2	Last
Student ID	Name	TAL Category	Tuition Group	Academic Career	Academic Program	Academic Plan	Billing Career	Ignore Exception				
██████	██████████	TGR	GG_GR	GR	GEOPH	GEOPH-PHD	GR	<input type="checkbox"/>				
██████	██████████	TGR	GG_GR	GR	GEOPH	GEOPH-PHD	GR	<input type="checkbox"/>				

- In the example above, the students have been aid year activated as TGR students, but are being billed at the Grad Quarter rate.

10. TAL Without Assistantship

- Identifies cases where salary has been cancelled but TAL has not.

Exception: TAL without Assistantship Exception Status: All Exceptions
Aid Year: 2008 Term: 1082 2007-2008 Autumn GFS Home Dept: AEROASTRO
School Code: ENGINEER School of Engineering
Total number of students: 1 [Generate Report](#)

Exception Data

Student ID	Name	TAL Category ID	Originator	Program Action	Action Date	Assistantship Lines
		ENGR		MATR	07/25/2007	Aid Seq AST001 Standard Hours 10.00

View All First 1 of 1 Last

Ident	Pay Org	Assistantship Hours	TAL Default Amt	TAL Disbursed Amount	Ignore Exception
Durand RA	RAAA	10.00	1850.00	4020.00	<input type="checkbox"/>

11. Tuition Mismatch; Billed and Paid

- Shows students who have a tuition charge in Student Financials for the term which does not equal GFS tuition payments (total of TAL and TUT).
- Only the completed and approved aid lines are considered.
- In the “Mismatch Amount” column, positive numbers show the amount of the student’s charge that has not been met with aid from GFS. Negative numbers indicate the amount of GFS aid that is over the student’s tuition charge for the quarter.
- Negative number should also be thought of as unapplied aid and should never be “ignored.”
- This report does not replace the Unapplied Aid Report found in ReportMart as it only considers tuition charges.

Exception: Tut Mismatch-Billed and Paid Exception Status: All Exceptions

Aid Year: 2007 Term: 1072 2006-2007 Autumn GFS Home Dept: BIOENGR

School Code: ENGINEER School of Engineering

Total number of students: 4 [Generate Report](#)

Exception Data		View All First 1-4 of 4 Last						
Student ID	Name	Units Taken	TAL Category	Amount Charged	TAL plus TUT	Mismatch Amount	TAL Default Amt	Ignore Exception
██████	██████████████████	10.000	ENGR	7620.00	0.00	7620.00	2760.00	<input type="checkbox"/>
██████	██████████████████	10.000	ENGR	7620.00	6096.00	1524.00	7620.00	<input type="checkbox"/>
██████	██████████████████	0.000	TMR	0.00	1990.00	-1990.00	7620.00	<input type="checkbox"/>
██████	██████████████████	10.000	ENGR	7620.00	11728.00	-4108.00	1770.00	<input type="checkbox"/>

12. US Students Greater Than 8 Hours in Payroll

- The report shows all students with 50% (greater than or equal to 20 hrs) assistantships and with a non-GFS job record in payroll greater than 8 hours per week.
- Allows you to identify situations where a student appears to be working elsewhere on campus.

Exception: US Studs > 8 Hrs in Payroll Exception Status: All Exceptions

Aid Year: 2007 Term: 1072 2006-2007 Autumn GFS Home Dept: GEOENVSCI

School Code: EARTHSCI School of Earth Sciences

Total number of students: 1 [Generate Report](#)

Exception Data									View All	First	4 of 1	Last
Student ID	Name	Standard Hours	Hiring Department	Payroll Data				Ignore Exception				
				Last Paycheck Date	Additional Payline #	Earn Code	Comp Rate Used	Other Hours	Other Earnings			
██████	██████████	30.00	BVZZ	05/21/2007	0	GFS	0.00	0.00	588.83	<input type="checkbox"/>		

We hope you find these new reports helpful!!

- If you have feedback please pass on through your GFS Advisory Group member.
- Or email Karen.Cooper@stanford.edu
- If you notice “technical difficulties” submit HelpSU