GFS Exception Reporting

An Early Warning System…

GFS Users Forum, November 18, 2009
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Objectives

• 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
GFS Exception Reporting Overview

• Tools to help you do your job more easily; not to create new work for you
• Flexibility to allow you to do your work your way
• Accessible to all with GFS access; most helpful to Home Department Approvers
• ReportMart1 Reports are still the best way for searching by PTA, Originator, etc.
Job Aid Available

- Use “LearnPS” for GFS Manuals and Job Aids
- Online Learning Player can be found at http://learnps.stanford.edu
GFS Exception Reporting

Job Aid Objectives

In this job aid, you will learn how to use GFS Exception Reporting 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.
- Export data to Excel.
Please select the Exception Report you would like to learn more about from the list below.

- Aid Entered but not Term Activated
- Assistantship Hours equal 16 per term or are greater than 20
- Disbursement Sequence Override
- Enrolled with Less Than 8 Units
- Foreign Students Greater Than 20 Hours
- Home Org Not Equal Term Activation
- No Units Enrolled
- TAL Award Not Equal to TAL Rate, Amount Override
- TAL Category Not Equal to Billing Career Tuition Group
- TAL Without Assistantship
- Tuition Mismatch: Billed and Paid
- US Students Greater Than 8 Hours in Payroll
Finding the Reports in PeopleSoft…
STF GFS Exception Reporting

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Use Saved Search: 

Aid Year: 

Exception: 

Term: begins with 

School Code: begins with 

GFS Home Department: begins with 

Exception Status: 

Search  Clear  Basic Search  Save Search Criteria  Delete Saved Search
There Are Twelve Reports

The image shows a screenshot of a webpage for STF GFS Exception Reporting. The screenshot includes a form with fields for Aid Year, Exception, Term, School Code, and GFS Home Department. Below are the fields and their current selections:

- **Aid Year**: 2010
- **Exception**: Begins with
- **Term**: Begins with
- **School Code**: Begins with
- **GFS Home Department**: Begins with

The form also includes options for Advanced Search and Basic Search buttons.
What the Exception Reports have in common…

• The idea is to present you with potential policy conflicts
• Related information is presented to expedite review
  ✓ You may still need to review Award Entry, Student Records info, HR info, etc.
• Students appear based on their home department per Aid Year Activation
• Will remain on the report until the data that is causing the conflict changes
• Data in the reports is refreshed nightly
“Ignore Exception” and making notes

• There are situations in which a potential exception isn’t a problem for a specific student
• There are other situations in which University Policy must be followed
• Don’t want to review the same exception over and over!
• This function is especially useful for departments where more than one individual is using these reports
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
- “Exception Status” allows you to filter those previously reviewed out of the report
The First 6…

- Aid Entered but not Term Activated
- Assistantship Hours (per Term) equal 16 or greater than 20
- Disbursement Sequence Override
- Enrolled with Less Than 8 Units
- Foreign Students Greater than 20 hours
- Home Org Not Equal Term Activation
The last 6…

- No Units Enrolled
- TAL award not equal to TAL Rate (Amount Override)
- TAL Category not equal to Billing Career Tuition Group
- TAL without Assistantship
- Tuition Mismatch – Billed and Paid
- US Students Greater than 8 Hours in Payroll
Top Reports for beginning of the term…

- **Enrollment Status Issues**
  - Aid Entered but Not Term Activated
  - Enrolled with Less Than 8 Units (except those with override)
  - No Units Enrolled

- **Examples:**
  - Students who unexpectedly took a leave of absence
  - Never enrolled so status cancelled
  - Students enrolling part time

- **Actions you may take:**
  - Contact student
  - Cancel salary before payroll interface
  - Use disbursement override if legitimately enrolled < 8 units
Disbursement Issues

• Disbursement Sequence Override
  ✓ List of students and aid where disbursement override was added

• TAL Awd not equal TAL Rate, Amount Override
  ✓ List of TAL awards with overrides

• TAL Category not equal Billing Tuition group
  ✓ Students who may be paying more or less for tuition than TAL Category expects, e.g., being billed engineering rate but home department is in H&S

• Tuition Mismatch -- Billed vs Paid
  ✓ Tuition support is more or less than amount billed (when more will result in unapplied aid)