GFS: Unapplied Aid and Other Updates

Joanna Sun & Malini Doering
November 7, 2012
UNAPPLIED AID: WHY DOES IT HAPPEN?

- Third Party Credits
- Tuition Status Change (going TGR)
- Health Insurance Waivers
- Run Unapplied Aid report after the final study list deadline or after the first payroll run of the quarter
RUNNING THE UNAPPLIED AID REPORT

- In ReportMart1

- GFS Unapplied Aid Report (PS_GFS015)

- See Handout for instructions on running the report
## GFS Unapplied Aid Report

### Current Academic Program(s):

<table>
<thead>
<tr>
<th>Term</th>
<th>Project</th>
<th>Task</th>
<th>Award</th>
<th>Expenditure Type</th>
<th>Aid Application</th>
<th>Refund Y/N</th>
<th>Aid Amount</th>
<th>Unapplied Aid Amt</th>
<th>Item Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>09837374</td>
<td>Stanford, Leland</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1066</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1018900</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57402</td>
<td>TU_ONLY</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57630</td>
<td>HLTHONLY</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57630</td>
<td>HLTH_SUB</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57630</td>
<td>HLTH_SUB</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57630</td>
<td>HLTH_SUB</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DADIZ</td>
<td>57630</td>
<td>HLTH_SUB</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8999000000002</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>873100009372</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Run Date:** 09/20/2006

**Real Tuition:** 100.00

**ASSU:** 22.00

**Health Ins:** 597.00

**Doc Fee:** 0.00
Changing GFS

- Confirm that there’s unapplied aid in the student’s bill in PeopleSoft (in the Student Services Center panel)

- Make updates in GFS to reflect the correct amount
Step 1: Pend the line.
Step 2: Check “Amount” box and enter the correct tuition amount
Step 3: Complete the line
OTHER CHANGES IN GFS

- PTA changes
- Early termination
- Canceling aid lines
- Stipend updates
WHY WOULD YOU NEED TO CHANGE THE PTA?

- Student was charged to the wrong grant or changed research projects
- Overdraft on PTA
PTA CHANGE

Step 1: Pend the line. Click “Details”. The Item Type box will be available for updating.
Step 2: Enter the correct PTA
Step 3: Complete the line
Step 4: If the PTA change will affect TAL too, the Calc Tal button will update the TAL PTA
Step 5: Complete the TAL line (Assist TAL panel)
Note: If this is a retroactive change work with your Finance Dept for the journal transfer
Why Would You Need to Enter an Early Termination?

- Appointment type change (e.g. from TA to RA) after GFS deadline
- Student status change (e.g. mid-quarter/year leave of Absence, advance to candidacy)
- Performance issues
EARLY TERMINATION

Step 1: Pend the line that you want to terminate.

Step 2: Enter the termination date and complete the line.

TAL disburses and is paid even if there’s an early termination. Check unapplied aid depending on the timing of the termination.
WHY WOULD YOU NEED TO CANCEL AN AID LINE?

- Entry errors in the student’s funding (disbursement plan, hours, pay amount).

- Appointment type changes (e.g. from TA to RA)

- Note: You don’t need to cancel a line for PTA changes. Just pend the line and correct the PTA.
Step 1: In status box enter “X” to cancel

Step 2: You’ll receive the following dialogue box. Click “Yes”.

Message
Cancel line 1: (25/10/08)

Yes  No
You’ll see this screen next. Click “Ok”
You’ll see this screen next. Select the reason you’re canceling the aid line.
Next go to the Assist TAL panel.

Step 1: Pend the line

Step 2: Click Detail
Check the amount box
After checking “Amount” this screen appears. Select your override reason.
Enter “0”
Next this screen appears. Click “Yes”.
### TAL Category

<table>
<thead>
<tr>
<th>Total Amt</th>
<th>Autumn GR</th>
<th>Winter GR</th>
<th>Spring GR</th>
<th>Summer GR</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Awarded TAL</td>
<td>4470.00</td>
<td>4470.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Assistantship TAL

<table>
<thead>
<tr>
<th>Aid Seq</th>
<th>Aid Type</th>
<th>Pay Org</th>
<th>Job #</th>
<th>Stu Org</th>
<th>Aid Uni</th>
<th>Grad Lvl</th>
<th>School Cd</th>
<th>Support Plan</th>
<th>TAL Calc Total</th>
<th>Awarded Total</th>
<th>Period Amt</th>
<th>TAL Status</th>
<th>Current Status</th>
<th>Description</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAL001</td>
<td>EDUCA</td>
<td>EAU001</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4470.00</td>
<td>4470.00</td>
<td>4470.00</td>
<td>Approved</td>
<td>Approved</td>
<td>Completed</td>
<td>Approved</td>
</tr>
<tr>
<td>TAL002</td>
<td>EDUCA</td>
<td>EAU001</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4470.00</td>
<td>4470.00</td>
<td>4470.00</td>
<td>Approved</td>
<td>Approved</td>
<td>Completed</td>
<td>Approved</td>
</tr>
</tbody>
</table>

### Action Buttons

- Save
- Return to Search
- Previous in List
- Next in List
- Notify

### Links

- FLSPHP Stipend
- FLSPHP Tuition
- Assist Salary
- Assist TAL
- Work Panel
Don’t forget to save
WHY WOULD YOU NEED TO UPDATE A STIPEND?

- Changing from fellowship to assistantship
- Change of student status (e.g. Leave of Absence)
- Wrong stipend amount
**STIPEND UPDATES**

Step 1: Pend the line
Step 2: Click on the Quarterly Notes tab
Step 3: Click “Override Term Amounts” The amount boxes will be editable
Step 4: Enter correct amount (or zero out the amount)
Step 5: Complete the line
RESOURCES

Unapplied Aid Job Aid (reportmart1)

GFS Manual
http://www.stanford.edu/dept/DoR/gfs/Sec6.html