

# 2012 HECB System Updates

State Student Financial Aid Workshops

May 1, 2, 3, and 4

## HECB IT Migration

- Mainframe to web-based portal migration (2003-2009)
  - EOG and SNG (2005)
  - SWS (2007)
  - Alt. Routes, Future Teachers, American Indian, WAVE, Scholars(2009)

# Recent IT Projects

- Health - Conditional Scholarships/Loan Repayment (2010)
- SNG 2.0 (2011)
  - Payment Utility to CSAW
  - Pilot Interim Report to CSAW
  - Receivables Transmittal
  - Archive Enhancements
- College Bound (2011-2012)
  - Matcher
  - Cruncher
  - CSAW integration

## Future IT Projects

- College Bound payments (Fall 2012)
- Finish Secure Site migration to the Portal
  - Unit Record
  - DVR
- Ongoing updates to keep up with changes in technology
- Legislative changes - New programs and updates to existing programs
- Work towards optimizing Financial Aid delivery

## Make Stuff Work Better

- We're looking for ways to get input on priorities from institutions
- Also looking for ways to get feedback on proposed changes from institution IT staff
- Possibly a steering committee? Or a technical workgroup that meets periodically?
- Please come and talk to me or e-mail with thoughts and ideas ([davidm@hecb.wa.gov](mailto:davidm@hecb.wa.gov))

# Upcoming Changes

- SNG Archive
- CSAW for All!
- Requesting Cash
- Electronic Repayment Transmittals

## SNG Archive Face-lift

The SNG archive underwent several changes:

- New look and functionality
  - Tabbed search options
  - Results sort-able and displayed in color
  - Details available on repayments, quarters used, AA degrees, and archive history
- New file format
  - Downloadable results available – obtain CSV file format on the Portal
  - Forward the new format to your campus IT staff if necessary
- All links to download the entire archive removed by August 2012
  - Campuses will check their students against data in the archive and receive a list of results

# Archive – New Look and Functionality

Tabbed search options:

- More search fields available
- Tab format for consistency among programs

## SNG Archive Search

The screenshot displays the 'SNG Archive Search' interface. At the top, there are three tabs: 'Targeted Search' (highlighted in orange), 'Search by SSNs', and 'Search by File Upload'. Below the tabs, the text 'Search by full/partial name or SSN' is displayed. The search fields include: 'SSN' with a single input box; 'Name' with two input boxes labeled 'last' and 'first'; and 'Archive Status' with a dropdown menu currently set to 'Any Status'. At the bottom of the search area, there are two buttons: 'Search' and 'Excel'.

## Archive – New Look and Functionality

Improvements to search results display:

- Sort by heading (SSN, QER, etc.)
- Results appear in color
- Repayment , AA degree, QER, and archive history details available. History of quarters used coming soon

Showing 1-2 of 2 results

<a href="#">SSN</a>	<a href="#">Name (last, first, MI)</a>	<a href="#">In Repayment</a>	<a href="#">Quarters Used</a>	<a href="#">Quarters Remaining</a>	<a href="#">Next Elig. AA Degree (term, year)</a>	<a href="#">Initial Archive Date</a>
[REDACTED]	SMITH, AARON D	\$ Yes				8/19/2005
[REDACTED]	SMITH, ALEXANDER E	No	14.000	1.000	Spring 2013	5/23/2008

\$

Repayment Details for SMITH, AARON D

Date	Institution	Initial Debt	Paid to Date	Balance
7/1/1997	Spokane CC	\$451.00	\$0.00	\$451.00

Degrees Earned by SMITH, ALEXANDER E

Graduation Date	Degree Type	Institution	Term, Year
3/31/2008	AA	Clark College	Winter 2008

## CSAW for All!

Due to the start of CBS In 2012-2013, all colleges will experience a change in the tools used to report data for SNG and CBS.

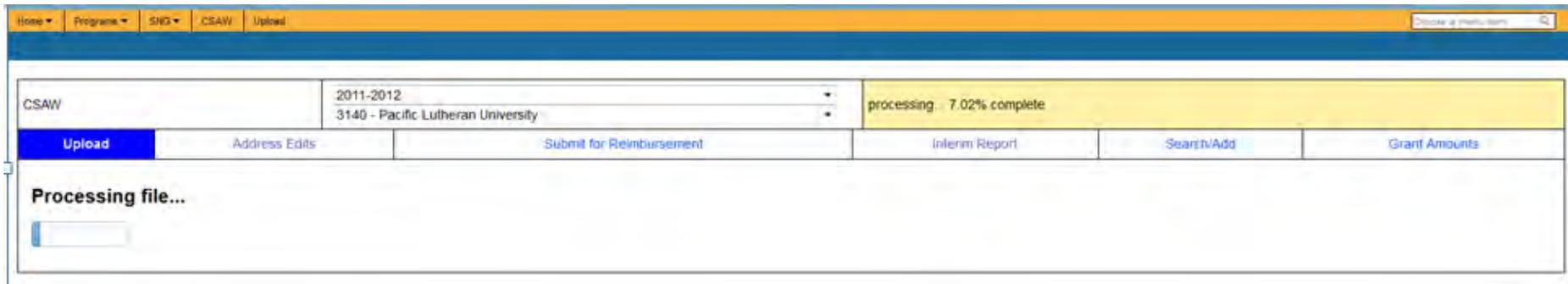
- CSAW is located in the Portal under SNG menu
- Publics will use CSAW for interim reporting and reconciliation of both SNG and CBS
- Private campuses will see incorporation of CBS into reimbursement requests, award management, and interim reporting

Home ▾					Programs ▾					SNG ▾					CSAW ▾					Choose a menu item <input type="text"/>				
Manage Interim Report   Payments   Reporting Periods																								
CSAW				2011-2012				1010 - University of Washington																
<a href="#">Upload</a>				<a href="#">Address Edits</a>				<a href="#">Interim Report</a>				<a href="#">Search/Add</a>				<a href="#">Grant Amounts</a>								
<p><b>Welcome to the College Bound/SNG Award Warehouse!</b></p> <p><b>To get started:</b></p> <ol style="list-style-type: none"> <li>1. <b>Upload</b></li> <li>2. <b>Address Edits</b></li> <li>3. <b>Submit for reimbursement/Submit interim report</b></li> </ol>																								

## CSAW - Incorporating College Bound

The first step for using CSAW, whether public or private, is uploading a file:

- Upload only ONE file
  - SNG served and unserved and CBS are all in one new file format
  
- CSAW will analyze your data
  - Track progress using the status bar



The screenshot shows the CSAW web application interface. At the top, there is a navigation bar with links for Home, Programs, SNG, CSAW, and Upload. Below this is a search bar. The main content area features a table with the following structure:

CSAW	2011-2012 3140 - Pacific Lutheran University	processing - 7.02% complete			
<a href="#">Upload</a>	<a href="#">Address Edits</a>	<a href="#">Submit for Reimbursement</a>	<a href="#">Interim Report</a>	<a href="#">Search/Add</a>	<a href="#">Grant Amounts</a>

Below the table, there is a section titled "Processing file..." with a progress bar that is approximately 7% full.

## CSAW – File Upload

- CSAW reads the file for formatting errors or potential missing information. Potential issues include:
  - Incorrect file format
  - Missing enrollment data for future terms
  - Unserved records only
- Depending on the issue, CSAW will not accept the file, or give you a warning and ask if you'd like to proceed with the upload.

**Summer term does not contain any unserved awards**

Each upload is expected to contain information for **both** served and unserved, for **all** terms for the current year.

Do you wish to proceed?

**no - cancel upload**      **yes - this is correct**

# CSAW – Uploading a File

- Preview your SNG and CBS awards to ensure the data looks correct

## Upload Preview

Click "save upload" below to finish the upload process.

save upload

discard upload

Award Overview		Total	Summer 1	Fall	Winter	Spring	Summer 2
SNG	Amount	\$4,322,160.00	\$76,855.00	\$2,156,484.00	\$0.00	\$2,088,821.00	\$0.00
	# Awards	1,516	48	744	0	724	0
	Served Awards	1,169	15	604	0	550	0
	Unserved Awards	347	33	140	0	174	0
CBS	Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	# Awards	0	0	0	0	0	0
Total	Amount	\$4,322,160.00	\$76,855.00	\$2,156,484.00	\$0.00	\$2,088,821.00	\$0.00
	# Awards	1,516	48	744	0	724	0
Change Preview Summary		Student-level changes		SNG award-level changes		CBS award-level changes	
to be added		6		11		0	
to be updated		34		65		0	
to be deleted		1		1		0	
to be cancelled		-		0		0	



Once you save, you replace everything that is currently in CSAW for your institution, so check carefully!

## CSAW – Interim Reports

- Private institutions will be required to upload a new file within the ‘reporting period’ to ensure current data. The reporting period for each report begins three (3) weeks before the due date.
- Due dates:
  - Fall – November 9, 2012
  - Winter – February 10, 2013
  - Spring – May 11, 2013
  - Recon – July 13, 2013
- For publics, the flow of uploading, addressing edits, and submitting for review are very similar to the old Interim Reporting Tool
  - A test environment will be available to run your data against SNG and CBS rules at any time



## CSAW – Addressing Edits

- Since all data will be in the Portal, the interim edit checks are much smarter.
  - Reduction in the number of edits
  - More information at your fingertips to resolve issues faster
- The process for addressing edits and completing reports remains similar, but with a different look
  - SNG edits remain the same, new edits added for CBS
  - Address edits for SNG and CBS in the same area
- More CSAW user documentation will be made available once systems building is completed

## CSAW – Addressing Edits

CBS-based edit examples:

- Awarded CBS student does not have a valid CBS application
- CBS student failed to meet 5-year enrollment deadline
- CBS student is not OK to Pay in the CBS Cruncher
- SNG and CBS awards combined exceed maximum award amount

Informational or overrideable edits to watch for:

- Student served or unserved for SNG, and has a valid CBS application, but no CBS award
- Recipient of both SNG and CBS but only in repayment for one

# CSAW – Addressing Edits

Home | Programs | SNG | CSAW choose a semester

Upload | Address Edits | Submit for Reimbursement | Interim Report | Search | Grant Amounts | Admin

## CSAW - Address Edits

2012-2013  
Pacific Lutheran University change

Processing completed at 2/2/2012 1:43 PM refresh view all edits in csv

<ul style="list-style-type: none"> <li> <b>SNG Award Edits</b> </li> </ul>	<b>52 edits</b>
Award Amount exceeds max award amount, most likely because of an enrollment status issue	14 edits
Award Amount exceeds max award amount, most likely because of a QER issue	7 edits
DCA amount exceeds max DCA amount, most likely because of an enrollment status issue	21 edits
This student has unpaid receivables for a prior term	2 edits
Cannot pursue another AA degree when one has already been awarded within 5 years of today	3 edits
Award Amount exceeds max award amount, but the cause is unclear	5 edits
<ul style="list-style-type: none"> <li> <b>CBS Award Edits</b> </li> </ul>	<b>7 edits</b>
<ul style="list-style-type: none"> <li> <b>Student Edits</b> </li> </ul>	<b>0 edits</b>

Click on an edit category to view the list of students in that category.

# CSAW – Addressing Edits

Home | Programs | SNG | CSAW Choose a menu item

Upload | Address Edits | Submit for Reimbursement | Interim Report | Search | Grant Amounts | Admin

## CSAW – Address Edits

2012-2013  
Pacific Lutheran University change

Processing...  send me a csv download once processing completes

You may work on edits while processing occurs

Award Amount exceeds max award amount, but the cause is unclear SNG Award Edits								5 edits		
Name	Term	Enrollment	Main Awd Amt	Max Awd Amt	QER	MFI	New or Continuing			
<a href="#">Doe, Jon (xxx-xx-1232)</a>	Fall	Full-Time	<input type="text" value="4971.00"/>	\$4,640.00	5.500	50%	New Student	save	override	delete
<a href="#">Doe, Jon (xxx-xx-1232)</a>	Fall	Full-Time	<input type="text" value="4971.00"/>	\$4,640.00	5.500	50%	New Student	save	override	delete
<a href="#">Doe, Jon (xxx-xx-1232)</a>	Fall	Full-Time	<input type="text" value="4971.00"/>	\$4,640.00	5.500	50%	New Student	save	override	delete
<a href="#">Doe, Jon (xxx-xx-1232)</a>	Fall	Full-Time	<input type="text" value="4971.00"/>	\$4,640.00	5.500	50%	New Student	save	override	delete
<a href="#">Doe, Jon (xxx-xx-1232)</a>	Fall	Full-Time	<input type="text" value="4971.00"/>	\$4,640.00	5.500	50%	New Student	save	override	delete

Make changes here, or click on name link for the individual student detail.

# Addressing Edits – Student Detail Screen

Pop-ups provide helpful details:

- MFI category and family size
- QER usage details for CBS and SNG
- CBS eligibility details
- Links to archive data

**CSAW - 2011-2012 Student Detail**

Last Name, First (xxx-xx-1234)

Pacific Lutheran University

**4 Edits** [view](#)

SID: 23456789af No SNG Archive Information Eligible for CBS

65% MFI  MFI Details

Family Size: 4  
# in College: 2  
Family Income: \$37,464

		Fall	Winter	Spring	Summer 2	Total	
SNG	Enrollment	Part-Time		Full-Time			<a href="#">details</a>
	Award Amount	\$2,464 !!!		\$2,464		\$4,928	
CBS	Enrollment	Full-Time		Full-Time			<a href="#">details</a>
	Award Amount	\$960		\$960		\$1,920	

The CBS award bla bla bla disclaimer about other awards and such

Passport							
WSP							
WAVE							
<b>Total</b>							\$6,848

**SNG QER Details**

Year	Inst	S1	F	W	Sp	S2	Pot	Used
2011-2012	PLU		1.5		1.5		3	0
2010-2011	PLU		1.5		1.5		0	3
2009-2010	PLU				1.5		0	1.5
	SPSCC		1	1			0	2
2008-2009	SPSCC		1	1	1		0	3
<b>Total</b>							3	9.5

**CBS Eligibility Details**

Last updated 12/1/2012 20:34

OK to Pay: 2

OK to Award: \$37,464

CB App Status: 2

HS Grad Yr: \$37,464

Enr. Deadline Met: 2

5-yr Elig. Window Open: \$37,464

# CSAW – Reimbursements for Private Colleges

- Reimbursement screen very similar to current screen, just adding in CBS
- Sort-able columns
- Individual program breakdowns
- Certification of reimbursement
- Option to download submission details in Excel

### CSAW - Request Reimbursement

2012-2013  
 Pacific Lutheran University change

Program	Selected Amount						Allocation	
	Summer 1	Fall	Winter	Spring	Summer 2	Total	Available	Remaining
SNG								
CBS								
Total								

Preview and Submit for Reimbursement Select more students

By submitting this reimbursement request for state financial aid, I certify that each student: meets this program's eligibility requirements, has a student directive on file, and has been paid the amount specified with institutional funds. Adjusted awards must all flow through a non-interest bearing account.

Submit for Reimbursement

Program	SID	Name (last, first, SID)	Enrollment	Award Amount	Amount to Reimburse

## Requesting Cash/Reimbursements

- Funds for CBS will be delivered in the same manner as SNG
- Funds will be requested together but tracked separately
- Public colleges will continue to request cash in the same location on the Portal. An additional request box will be available for CBS
- Private institutions will request cash for CBS and SNG using the reimbursement screen in CSAW
  - 'running balance' method will be the same for both programs
- Allocations for CBS will be entered in the Portal in August

## CSAW – Reconciliation

- Like interim reports, the reconciliation process will include both CBS and SNG
- CBS and SNG reconciled separately but simultaneously
- The Recon/Balancing tool for publics not built yet
  - Plan for similar or increased functionality
  - More instructions to come as 12-13 recon approaches
- CBS may be harder to redistribute at the end of year, so unused funds should be returned to HECB as soon as possible

## Automated Repayment Transmittals

- **Paper transmittals or electronic files sent via secure messaging will no longer be accepted in 2012-2013**
  - Paper transmittals lacked consistency across institutions
  - HECB working towards paperless goal for SNG
  
- Online Receivables Transmittal located in Portal:
  - Login at <https://fortress.wa.gov/hecb/portal/default.aspx>
  - Common/Student Receivables/Submit Transmittal

## Automated Repayment Transmittals

- **As of July 1, paper or electronic repayment transmittals will no longer be accepted**
- SNG and CBS repayments for the same student must be referred to HECB at the same time due to external billing service
- Reasons you will be excited to convert:
  - Auto-fill student data already present via CSAW
  - Upload a file of multiple SSNs
  - Refer SNG and CBS repayments simultaneously
  - List more features
  - Feedback from current users
    - ◆ Saves steps
    - ◆ Institution to bill process much slicker
    - ◆ Referral process time shaved by up to one third

# Automated Repayment Transmittals

## Online Receivable Transmittal

[Use Status and Referral Date Instead of SSN](#)

SSN  or Last Name  First Name

Total Results: 3

<a href="#">Last, First</a>	<a href="#">SSN</a>
<a href="#">Duck, Daffy</a>	123-45-6789
<a href="#">Doe, John</a>	111-11-1111
<a href="#">Schmo, Joe</a>	222-22-2222

# Automated Repayment Transmittals

## Online Receivable Transmittal

[Use Status and Referral Date Instead of SSN](#)

SSN 
     or    Last Name 
     First Name

123-45-6789    **Duck, Daffy**

Academic Year    Institution    Term

<b>SNG</b> Status <input type="text" value="In Repayment"/>	<b>CBS</b> Status <input type="text"/>
<input type="text" value="500"/> <input type="text" value="200"/> <input type="text" value="3/30/2012"/> Award Amount    Referral Amount    Date Student Was Notified	SNG Award has a receivable, but CBS Award for same term does not To save this receivable you have to override this edit or create a receivable for CBS too <input type="text" value="I like peanut butter"/>
<input type="text" value="bla bla bla"/> Reason for repayment	

An award exists for both SNG and CBS. When trying to save a receivable for only 1 of the awards the user must enter an override for the rule that will be broken

## Need Help?

### General Questions, Reporting and Fund Management

- Carissa Glassburn [carissag@hecb.wa.gov](mailto:carissag@hecb.wa.gov)

### Cash requests and Reimbursements

- Victor Fernandez [victorf@hecb.wa.gov](mailto:victorf@hecb.wa.gov)

### Repayments and Receivables

- Chris Demonte [chrisd@hecb.wa.gov](mailto:chrisd@hecb.wa.gov)