

Financial Aid
Definitions of Roles

ROLE	DESCRIPTION	PEOPLESOFT ROLE NAME
<p>FA DO View (FOR DO Staff ONLY)</p>	<p>For DO General Accounting staff who require view only access to student financial aid information:</p> <ul style="list-style-type: none"> ➤ Set Up SACR <ul style="list-style-type: none"> - View Financial Aid Fiscal Item Types ➤ Loans <ul style="list-style-type: none"> - View imported Direct Loan school account summary data. - View Direct Loan application data. ➤ Pell Payment <ul style="list-style-type: none"> - View originated Pell payments student records. <p>NOTE: The following query reports are needed for Pell and Loan reconciliations:</p> <ul style="list-style-type: none"> ➤ Pell <ul style="list-style-type: none"> - LR_FA_PELL_RECON_DIF_AMT <i>(PS Pell Disb but no match COD Disb)</i> - LR_FA_PELL_RECON_NO_PGRC <i>(Disb Pell PS Not in COD PGRC)</i> - LR_FA_PELL_RECON_NO_PS_NID <i>(COD Disb but no SSN in PS)</i> - LR_FA_PELL_RECON_NO_PS <i>(COD Pell Disb but no PS Pell)</i> ➤ Loans <ul style="list-style-type: none"> - LR_FA_LN_DLEXLOAN_FOR_DL_TOOLS <i>(DL Tools Extract File)</i> 	<p>LR_SA_FA_DO_VIEW</p>
<p>FA DO Access</p>	<p>For DO staff who need access to the Financial Aid item types to establish aggregate amounts that can be awarded and disbursed:</p> <ul style="list-style-type: none"> ➤ Set Up SACR <ul style="list-style-type: none"> - Enter aggregate amounts that can be awarded for each FA item type. 	<p>LR_SA_FA_DO_ACCESS</p>
<p>FA Awards View</p>	<p>For staff (Business Office, A&R) who require view only access to student financial aid awarded and disbursement details. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Course Auditor <ul style="list-style-type: none"> - FA Eligibility (Staff) - View ineligible Classes ➤ Awards <ul style="list-style-type: none"> - View student awarded information. - View student need summary. - View student term awarded summary. ➤ Disbursement <ul style="list-style-type: none"> - View student disbursements. 	<p>LR_SA_FA_AWARDS_VIEW</p>

FA View I	<p>For staff (Appeal Committee) who require view only access to general student financial aid information for FA appeals. FA View I grant all access of FA Awards View and the following:</p> <ul style="list-style-type: none"> ➤ Awards <ul style="list-style-type: none"> - View NSLDS loan data. 	LR_SA_FA_VIEW_1
FA View II	<p>For management (VPSS, Directors, Deans) and Financial Aid staff who require view only access to detail student financial aid information. FA View II access grant all access of FA View I and the following:</p> <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - View Financial Aid Status, including unmasked SSN, ISIR information, database matches, need summary, and financial aid awarded. - View ISIR corrected information. - View ISIR records, including student and parent information. - View student term data, including academic plan, term status, units, etc. ➤ Awards <ul style="list-style-type: none"> - View user edit messages. - View student summary budget. ➤ Checklists <ul style="list-style-type: none"> - View checklists details ➤ Comments <ul style="list-style-type: none"> - View comments details ➤ Communications <ul style="list-style-type: none"> - View communications details. (<i>Note: Ensure pop-up window is allowed on web browser to view generated communication.</i>) ➤ Packaging <ul style="list-style-type: none"> - View the Packaging Status Summary page. - View the Mass Packaging Summary. - View Student Work Study ➤ Satisfactory Academic Progress <ul style="list-style-type: none"> - View SAP status, override career, and term exceptions ➤ LR Financial Aid <ul style="list-style-type: none"> - View Student Consortium Tracking <p>NOTE: To view the checklist, comment, and communication (3C), the 3C Group Security form must be completed.</p>	LR_SA_FA_VIEW_2

FA View III	<p>For Financial Aid staff who require view access to all financial aid data. FA View III access grant all access of FA View II and the following:</p> <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - View Ability to Benefit. - View ISIR Correction Audits. - View Financial Aid History ➤ Loans <ul style="list-style-type: none"> - View Direct Loan applications data and amounts. ➤ Awards <ul style="list-style-type: none"> - View award activity. ➤ Budgets <ul style="list-style-type: none"> - View student term budget, including FA term, need summary, and student detail. ➤ Pell Payment <ul style="list-style-type: none"> - View Pell origination and distributions information. ➤ LR Financial Aid <ul style="list-style-type: none"> - View Higher One Card Data. ➤ FA Automation <ul style="list-style-type: none"> - View set up rules for checklist creation. ➤ Set Up SACR > Financial Aid <ul style="list-style-type: none"> - View set up rules for Financial Aid. ➤ Student Financials > LR Follett Student FA Credits <ul style="list-style-type: none"> - View student credit limit for bookstore voucher by term. <p>NOTE: To view the checklist, comment, and communication (3C), the 3C Group Security form must be completed.</p>	LR_SA_FA_VIEW_3
Student Center View	<p>For FA staff who is authorized to view student's information via the Student Center. This access grants access to view all financial aid students' data including to do list, etc.</p> <ul style="list-style-type: none"> ➤ Student Services Ctr <ul style="list-style-type: none"> - View student self-service homepage. - View "To Do List". - View "My Financial Aid". 	LR_SA_FA_STDNT_CTR_VIEW
FA Reporting I	<p>For FA staff who are authorized to run reports for FA validation. The role grants the following page access:</p> <ul style="list-style-type: none"> ➤ Loans > DL School Account Summary <ul style="list-style-type: none"> - Generate DLSAS Report (FADLSAS4). ➤ Pell Payment > Cash Management Reports <ul style="list-style-type: none"> - Review Statement of Account. - Print Grant ESOA (FA870). <p>NOTE: Current role in PS Student Administration – Student Financials.</p>	LR_SA_FA_RPT_I_ADD_ON

FA Access I	<p>For FA student/temporary employees who maintain very basic student financial aid records. This access grants all access of the FA View III and the following access:</p> <ul style="list-style-type: none"> ➤ Checklists <ul style="list-style-type: none"> - Update required checklist, status, and effective date. - Add required checklist. - Update. ➤ Comments <ul style="list-style-type: none"> - Add comments to student records. ➤ Communications <ul style="list-style-type: none"> - Generate a communication to be sent. ➤ LR Financial Aid <ul style="list-style-type: none"> - View F Grade Data. ➤ Student Services Ctr <ul style="list-style-type: none"> - View student e-Services screens. <p>NOTE: To view the checklist, comment, and communication (3C), the 3C Group Security form must be completed.</p>	LR_SA_FA_ACCESS_1
FA User Edit Access	<p>For FA employees who are responsible for clearing user edit messages. This access grants the following access:</p> <ul style="list-style-type: none"> ➤ Maintain User Edit Messages <ul style="list-style-type: none"> - Update user edit messages (such as NSLDS flagged students) used in the disbursement processes. (<i>Note: Run “LR_FA_FA924_NSLDS_ALERT_FILE” to determine all NSLDS flagged students.</i>) ➤ NSLDS <ul style="list-style-type: none"> - Access to clear NSLDS Flagged Students. 	LR_SA_FA_USER_EDIT
FA Term Data Override	<p>For FA employees who are authorized to override term data for a student. This access grants the following access:</p> <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - Update/Correct student term data, including academic plan, term status, units, packaging variables, etc. ➤ LR Financial Aid <ul style="list-style-type: none"> - Update Student Consortium Tracking information. 	LR_SA_FA_TERM_DATA_OVR
FA School Assign Access	<p>For FA employees who are authorized to process mid-year transfers. This access grants the following access:</p> <ul style="list-style-type: none"> ➤ LR Financial Aid <ul style="list-style-type: none"> - Update FA Term School. 	LR_SA_FA_SCH_ASSIGN_ACCESS
FA Budget Access	<p>For Financial Aid staff who require access to update a student’s term budget needs.</p> <ul style="list-style-type: none"> ➤ Budgets <ul style="list-style-type: none"> - Update access to a student’s term budget, such as override an existing term budget or create a term budget on an exception basis. 	LR_SA_FA_BUDGET_ACCESS

FA Direct Loan Access	<p>For Financial Aid staff who process Direct Loan Applications.</p> <ul style="list-style-type: none"> ➤ Loans <ul style="list-style-type: none"> - Access to manage and review Direct Loan applications. Such as: <ul style="list-style-type: none"> • Override Direct Loan demographic data and SULA. • Update loan application data, and origination detail. • Update Direct Loan processing actions and statuses. 	LR_SA_FA_DL_ACCESS
Service Indicator Update	<p>For staff who are authorized to place and release student-related services indicators. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Campus Community Module <ul style="list-style-type: none"> - Update Manage Service Indicators (<i>Additional row level security required. Submit the Service Indicators Security Form</i>). - Audit Service Indicators. <p>NOTE: User security to place and release service indicator is needed.</p>	LR_SA_CC_SRVC_IN_UPD_ADD_ON (Current role in PS SF)
Service Indicator Update II	<p>For staff who are authorized to place and release student-related services indicators in mass (batch). This access grants the Service Indicator Update and the following page access:</p> <ul style="list-style-type: none"> ➤ Campus Community Module <ul style="list-style-type: none"> - Mass assign service indicators. - Mass release service indicators. <p>NOTE: User security to place and release service indicator is needed.</p>	LR_SA_CC_SRVC_IN_UPD_2_ADD_ON
SAP Override I Add-On	<p>For FA staff who are authorized to override generated SAP status based on appeal process.</p> <ul style="list-style-type: none"> ➤ Satisfactory Academic Progress <ul style="list-style-type: none"> - Access to override generated SAP status. - Access to rerun SAP calculation. 	LR_SA_FA_SAP_OVR_1_ADD_ON
SAP Override II Add-On	<p>For FA staff who are authorized to override SAP career and term exceptions.</p> <ul style="list-style-type: none"> ➤ Satisfactory Academic Progress <ul style="list-style-type: none"> - Access to override career and term exceptions 	LR_SA_FA_SAP_OVR_2_ADD_ON
FA Loan Exit Tracking Application	<p>For FA officers who need access to the student loan information and input or update the student loan counseling activities. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ LR Financial Aid <ul style="list-style-type: none"> - Update FA loan exit tracking information 	LR_SA_FA_LOAN_EXIT_ADD_ON (Current role in PS SF)

FA Packaging Summary Add-On	<p>For FA staff who assigns files to file reviewers. Due to security limitation, this access also grants access to mark a file as reviewed and verified.</p> <ul style="list-style-type: none"> ➤ View Packaging Status Summary <ul style="list-style-type: none"> - Access to assign counselor to student financial aid file. - Access to mark a file as reviewed, verified, and ready for packaging. - Access to override database matches. - Access to override Pell Calculation. 	LR_SA_FA_PACK_SUM_ADD_ON
FA File Reviewer Access	<p>For FA staff who performs file verification. This access grants the Packaging Status Summary Add-on and the following page access:</p> <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - Update ISIR records, including student and parent information. - Manage Ability to Benefit. ➤ View Packaging Status Summary <ul style="list-style-type: none"> - Access to assign counselor to student financial aid file. - Access to mark a file as review, verified, and ready for packaging. - Access to override database matches. <p>NOTE: FA File Reviewer Access and Packaging Access should not be granted to the same person (separation of duties).</p>	LR_SA_FA_FILE_REVIEW_ACCESS
FA ISIR Simulation Add- On	<p>For FA staff who need to perform an ISIR simulation to determine if there will be change in a student EFC/SAI with corrected information. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - Update ISIR simulation records to determine EFC. <p>NOTE: If USE SIMULATED DATA button is used, ISIR records will be updated with simulated data.</p>	LR_SA_FA_ISIR_SIM_ADD_ON
FA Packaging Access	<p>For FA staff who award student financial aid. This access grants all access of the FA Award View and the following access:</p> <ul style="list-style-type: none"> ➤ Awards <ul style="list-style-type: none"> - Assign financial aid awards to students. - View award activity log. - View mass packaging details. ➤ LR Financial Aid <ul style="list-style-type: none"> - View F Grade Data. - Update data on View Higher One Card Data page. 	LR_SA_FA_PACKAGING_ACCESS
FA Pell Grant Access	<p>For FA staff who process Pell Grants. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Pell Grants <ul style="list-style-type: none"> - View or change originated Pell payments 	LR_SA_FA_PELL_GRANT_ACCESS

FA Cal Grant View	<p>For FA staff who need to view Cal Grants information. This access grants the following view access:</p> <ul style="list-style-type: none"> ➤ Cal Grant Process <ul style="list-style-type: none"> - View Cal Grant rosters. - View Cal Grant loaded students. - View Cal Grant change files. - View Cal Grant accepted students. - View Cal Grant rejected students. - View Cal Grant applications. - View suspended Cal Grant applications. ➤ Awards <ul style="list-style-type: none"> - View packaging variables. - View additional variables. 	LR_SA_FA_CALGRANT_VIEW
FA Cal Grant Access	<p>For FA staff who process Cal Grants. This access grants the access of FA Cal Grant View and the following page access:</p> <ul style="list-style-type: none"> ➤ Cal Grant Process <ul style="list-style-type: none"> - Update Cal Grant rosters. - Add, update, or correct Cal Grant loaded students. - Add, or update Cal Grant change files. - Load and update Cal Grant suspended files. ➤ Awards <ul style="list-style-type: none"> - Update packaging variables. - Update additional variables. 	LR_SA_FA_CALGRANT_ACCESS
FA R2T4 Add-On	<p>For FA staff who perform R2T4 calculations. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Return to Title IV Funds <ul style="list-style-type: none"> - Return TIV Session. - Create Worksheet (individual student). ➤ LR R2T4 Process <ul style="list-style-type: none"> - Create R2T4 Student (batch). - Update R2T4 Worksheets. - R2T4 Worksheet Delete. <p>NOTE: Staff DeptID (from the Employees table) is used to control access to create R2T4 for only students enrolled in their college.</p>	LR_SA_FA_R2T4_ADD_ON (Current role in PS SF)
FA Professional Judgement (PJ) Override	<p>For FA staff who are authorized to award via a professional judgement override. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Awards <ul style="list-style-type: none"> - Invoke Professional Judgment 	LR_SA_FA_PJ_OVERRIDE_ADD_ON
FA Create Student	<p>For FA staff who are authorized to add FA students without an ISIR for scholarships, grants, etc. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Aid Year Activation <ul style="list-style-type: none"> - Aid year activate a student. ➤ Budgets <ul style="list-style-type: none"> - Create student budgets. ➤ LR Financial Aid <ul style="list-style-type: none"> - Manually add a FA Scholar/Loan College. 	LR_SA_FA_CREATE_STUDENT_ADD_ON

FA ISIR Suspense View	For FA staff who need view access to ISIRs that are suspended for informational and resolutions purposes. This access grants the following page access: <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - View suspended ISIRs 	LR_SA_FA_ISIR_SUSPENSE_VIEW
FA ISIR Suspense Add-On	For FA staff who need to process/load suspended ISIRs. This access grants the following page access: <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - Process suspended ISIRs. 	LR_SA_FA_ISIR_SUSPENSE_ADD_ON
FA NSLDS Override	For FA staff who are authorized to override NSLDS aggregate total for Pell and DL. This access grants the following page access: <ul style="list-style-type: none"> ➤ Awards <ul style="list-style-type: none"> - Update NSLDS aggregate amounts. 	LR_SA_FA_NSLDS_OVERRIDE_ADD_ON
BOG Maintenance View Only	For staff who require inquiry only access to the BOG & AB19 waivers. This access grants the following page access: <ul style="list-style-type: none"> ➤ Student Financials Module <ul style="list-style-type: none"> - BOG Maintenance. - AB19 Promise Program Status. 	LR_SA_SF_BOG_MNT_VW_ADD_ON (Current role in PS SF)
BOG Maintenance	For staff who maintain the BOG & AB19 waivers. This access grants the following page access: <ul style="list-style-type: none"> ➤ Student Financials Module <ul style="list-style-type: none"> - Add and update BOG Maintenance. - Update AB19 Promise Program Status. 	LR_SA_SF_BOG_MNT_ADD_ON (Current role in PS SF)
BOG C Upload	For FA staff who are authorized to run the process that enters BOG C applications information into Student Financials that updates the Equation Variable data. The process grants the following page access: <ul style="list-style-type: none"> ➤ Student Financials Module <ul style="list-style-type: none"> - BOG C Waiver Upload. 	LR_SA_SF_BOG_C_UPLOAD (Current role in PS SF)
FA Message Center View	For FA staff who are authorized to view all messages sent to a student e-services account. This access grants the following page access: <ul style="list-style-type: none"> ➤ Campus Community Module <ul style="list-style-type: none"> - Search for threads in HPT Message Center (view a message). <p>NOTE: Currently there is no security to prevent staff from viewing messages sent from another college or department.</p>	LR_SA_FA_MESSAGE_CTR_VIEW
FA Message Center Access	For FA staff who are authorized to send messages to student's eServices account. This access includes the access of FA Message Center View and the following: <ul style="list-style-type: none"> ➤ Campus Community Module <ul style="list-style-type: none"> - Add a thread in HPT Message Center (i.e. send a message). - Reply to a message already sent. 	LR_SA_FA_MESSAGE_CTR_ACCESS

FA Message Center Access II	For FA staff who are authorized to send messages in batch to student e-Services accounts. This access includes the access of FA Message Center Access and the following: <ul style="list-style-type: none"> ➤ HighPoint Projects <ul style="list-style-type: none"> - Send messages in batch via the message center processes. 	LR_SA_FA_MESSAGE_CTR_ACCESS_II
FA BOGW Appeal Access	For FA staff who are authorized to approve/denied BOGW appeal. This access grants the following page access: <ul style="list-style-type: none"> ➤ Records and Enrollment <ul style="list-style-type: none"> - Update Student Appeal. 	LR_SA_FA_BOGW_APPEAL_ACCESS
FA ATB Access	For FA staff who perform add, update, and manage student's Ability to Benefit for Financial Aid processing. This access grants the following page access: <ul style="list-style-type: none"> ➤ Financial Aid <ul style="list-style-type: none"> - Update and manage Ability to Benefit 	LR_SA_FA_ATB_ACCESS
FA Work Study Access	For FA staff who update student work study assignments. This access grants the following page access: <ul style="list-style-type: none"> ➤ Packaging <ul style="list-style-type: none"> - Update student work study. 	LR_SA_FA_WRKSTUDY_ACCESS
FA ISIR Delete	For FA staff who are authorized to delete an ISIR. This access grants the following page access: <ul style="list-style-type: none"> ➤ ISIR Import <ul style="list-style-type: none"> - Delete ISIR and NSLDS Records. ➤ Cal ISIR Processing Updates <ul style="list-style-type: none"> - Delete Cal ISIR Records. 	LR_SA_FA_ISIR_DELETE_ACCESS
FA Units Add-On	For FA staff who are authorized to adjust a student's FA units due to course applicability. This access grants the following page access: <ul style="list-style-type: none"> ➤ Financial Aid Term <ul style="list-style-type: none"> - Run process to update FA Progress Units. 	LR_SA_FA_UNITS_ADD_ON
FA Disbursement Override Add-On	For management staff who are authorized to manually override disbursements rules. This access grants the following page access: <ul style="list-style-type: none"> ➤ Disbursement <ul style="list-style-type: none"> - Authorized and disbursed aid with overrides. <p>NOTE: Access allows disbursement of aid; this is a Separation of Duties issue, if assigned to FA staff.</p>	LR_SA_FA_DISB_OVERRIDE_ADD_ON

FA File Assignment Access	<p>For FA staff who are authorized to assign student files to File Reviewer. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Set Up SACR> System Administration> Utilities> Population Update> Population Update Process <ul style="list-style-type: none"> - Run process to batch assign file reviewers to students. <p>NOTES:</p> <ul style="list-style-type: none"> ➤ Additional security required. User must be assigned access to update the STDNT_AID_ATRBT table (<i>via Set Up SACR, Security, Secure Student Administration, User ID, Population Update Security, Population Update Security</i>). ➤ Users will also be able to batch update, Application Status, Processing Status, College, Drug Offense Override, ED Verification Status Cd, INS Match Override, NSLDS Override, Review Status, SS Match Override, SS Register Override, SSA Citizen Override, SSN Match Override, SAP, Self Service Awarding Access, Self-Service Inquiry Access, Shopping Sheet Group, and VA Match Override with the STDNT_AID_ATRBT table. 	LR_SA_FA_FILE_ASSIGN_ACCESS
FA Authorized Batch Access	<p>For FA staff who are authorized run the batch process to authorized FA students for disbursement. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Disbursement <ul style="list-style-type: none"> - Process Award Authorizations. 	LR_SA_FA_AUTH_BATCH_ACCESS
FA Direct Loan Override	<p>For FA staff who are authorized to manually accept a loan origination, manually accept a promissory note, update the disbursement status, put the loan in hold or error status, and remove a hold from the loan. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Loans <ul style="list-style-type: none"> - Override Processing Status. 	LR_SA_FA_DL_OVRD

<p>FA External Award Access</p>	<p>For FA staff who are authorized to load external awards. This access should be highly restricted due to mass uploading of student external awards that can bypass PeopleSoft security and may adjust student awards that have already been disbursed. This access grants the following page access:</p> <ul style="list-style-type: none"> ➤ Need Summary Validation ➤ External Awards <ul style="list-style-type: none"> - Manually add external awards to student. - Load and Process batch external awards to students. - View External Award Load Detail. - Process SF External Award. ➤ Set Up SACR> System Administration> Utilities> Population Update> Population Update Process <ul style="list-style-type: none"> - Run process to batch assign external awards to students. ➤ Repackaging <ul style="list-style-type: none"> - Repackage students in batch to activate the external awards and validate awards. <p>NOTES:</p> <ul style="list-style-type: none"> ➤ Additional security required. User must be assigned access to update the STDNT_AWARDS table (via Set Up SACR, Security, Secure Student Administration, User ID, Population Update Security, Population Update Security). ➤ Query Viewer Security is needed to access the following queries: <ul style="list-style-type: none"> - LR_FA_POP_REPKG_EA - LR_FA_REMOVE_EA_FLAG - LR_FA_REPACKAGE_COMPARE ➤ Additional network shared folder access required (where XXX is the college). Must complete and submit the FA FileShare Access Request Form. <ul style="list-style-type: none"> - \\lrccd-data1\LRCCD\FinancialAid\XXX\ExternalAwards 	<p>LR_SA_FA_EXTERNAL_AWARD_ACCESS</p> <p>UserID security: STDNT_AWARDS</p>
<p>FA BI Reports</p>	<p>For FA staff who are authorized to run or schedule BI Publisher reports. This access contains view and access to download SSNs in large quantities.</p> <ul style="list-style-type: none"> ➤ Reporting Tools > BI Publisher > Query Report Viewer <ul style="list-style-type: none"> - Cal Grant Reconcile (BI Pub) (LRFARECONCG) - Check List Item Report (LRFACKLRPT) - Consortium Course Status Rpt (LRFACONSORTI) - Direct Lending Recon (LRFARCONDLAY) - PELL Reconciliation All in One (LRFARECONPEL) - R2T4 Reimbursement Claim Form (LRFAR2T4RMBS) - WS Student Awards need Correct (LRFA_WKST_01) 	<p>LR_SA_FA_BI_REPORTS_1</p>