

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>





See It!



Try It!



Know It?



Do It!

Outline

Search

All

- [-] Enrollment
- [-] GFS (Graduate Financial Support)
 - [+] GFS Read Only
 - [+] GFS Workflow Home for Appro
 - [+] GFS Disbursement Overrides
 - [+] GFS - Find Item Types Using th
 - [+] GFS - Entering Aid for Visiting F
 - [+] GFS - Entering an Assistantshi
 - [+] GFS - Entering a Summer Assi
 - [+] GFS Entry
 - [-] **GFS Exception Reporting**
 - [+] GFS Exception Reporting -
 - [+] Using the Reports
 - [+] **Criteria for Inclusion on the**
 - [+] GFS - Requesting Item Types
- [+] GSB Admissions
- [+] Graduate Admissions
- [+] HR/Benefits & Faculty Affairs

Concept

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.

Menu

Search:

- ▶ My Favorites
- ▶ STF Web Forms
- ▶ Courses & Grades Menu
- ▶ Self Service
- ▶ Campus Community
- ▶ Student Recruiting
- ▶ Student Admissions
- ▶ Records and Enrollment
- ▶ Curriculum Management
- ▶ Student Financials
- ▶ Academic Advisement
- ▶ Contributor Relations
- ▶ STF AX HR Selfservice
- ▶ STF Grad Financial Support
 - ▼ STF Graduate Financial Support
 - ▶ Use
 - ▶ Setup
 - ▶ Inquire
 - ▶ Process
 - ▼ Report
 - STF GFS Exception Reporting
 - ▶ STF Request Item Type
- ▶ Set Up SACR
- ▶ PeopleSoft
- ▶ Worklist
- ▶ Reporting Tools
- ▶ Axxess Links
- ▶ PeopleTools

STF GFS Exception Re

Enter any information you have

Find an Existing Value

Aid Year: =

Exception: =

Term: begi

School Code: begi

GFS Home Department: begi

Exception Status: =

Search

Clear

Bas

Try It!

Actions



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](#)

blank for a list of all values.

ria

Finding the Reports in PeopleSoft...

Graduate Financial Support > Report > STF GFS Exception Reporting

STANFORD AXESS 

Menu ADD TO FAVORITES

Search:

- My Favorites
- STF Web Forms
- Courses & Grades Menu
- Self Service
- Manager Self Service
- STARS Menu
- Training and References
- Time and Labor
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Student Financials
- Academic Advisement
- Contributor Relations
- STF AX Menu
- STF AX HR Selfservice
- STF Grad Financial Support
 - STF Graduate Financial Support
 - Use
 - Setup
 - Inquire
 - Process
 - Report**
 - STF GFS Exception Reporting**
 - STF Request Item Type
 - STF GFS Web Forms

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: =

[Basic Search](#) [Delete Saved Search](#)

There Are Twelve Reports

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:

School Code:

GFS Home Department:

Exception Status:

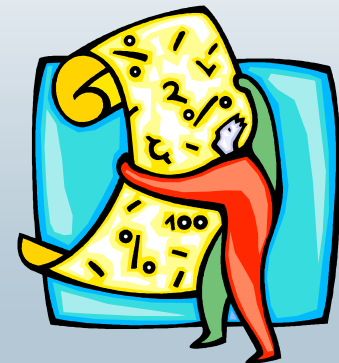
-
- Aid Entered but not Term Activ
- Ast hrs=16hrs/term or Tot>20
- Disbursement Sequence Override
- Enrolled with < 8 Units
- Foreign Students > 20 Hrs
- Home Org<->Term activation
- No units enrolled
- TAL Awd<->TAL Rate, Amt Ovr
- TAL Cat<->Billing Car Tut grp
- TAL without Assistantship
- Tut Mismatch-Billed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

[Basic Search](#)

[Advanced Search](#)

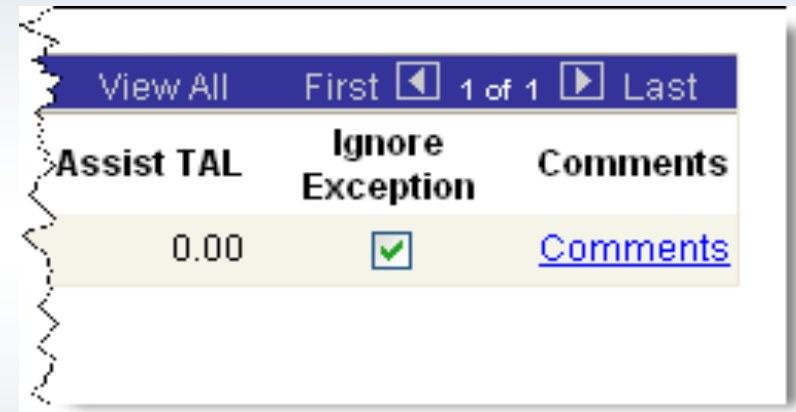
What the Exception Reports have in common...

- 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

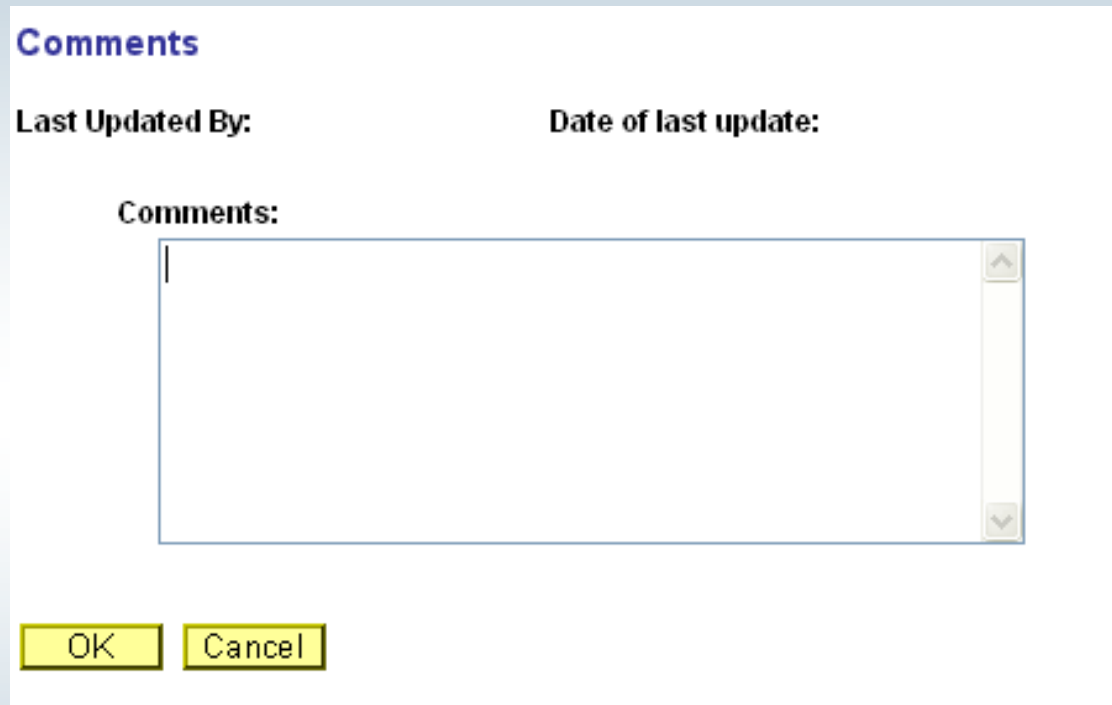
- There are situations in which a potential exception isn't a problem for a specific student
- There are other situations in which University Policy must be followed
- Don't want to review the same exception over and over!
- This function is especially useful for departments where more than one individual is using these reports



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
- “Exception Status” allows you to filter those previously reviewed out of the report



Comments

Last Updated By: Date of last update:

Comments:

OK Cancel

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)