

# Role Documentation for Financial Aid

**FA Directors - Update** access to Financial Aid (FA) Term, Awarding pages including Professional Judgment, Budget, Institutional Application Data (PROFILE), PROFILE suspense, ISIR file data, CU Interfaces and Mods for FA (custom) pages, ACG/SMART & Service Indicator access.

**View** access to Award letter and Award Views, ISIR Suspense and Correction, Loans, Disburse Aid, ACG/SMART, Aggregates, Fund Management, Set Up tables, Student Services Center, Search/Match, & FA History

**FA Assoc/Asst Dir - Update** access to FA Term, Awarding pages including Professional Judgment, Mass Packaging, Budget, Institutional Application Data, Profile suspense, ISIR file data, CU Interfaces and Mods for FA (custom) pages, ACG/SMART, & Service Indicator access

**View** access to Award letter and Award Views, ISIR suspense and Correction, Loans, Disburse Aid, Satisfactory Academic Progress, Aggregates, Set Up tables, StudentServicesCenter, Search/Match, Bio/Demo pages & FA History

Report only access to Fund Management

**FA Counselors -- Update** access to FA Term, Awarding pages, ISIR Correction, Budget, Institutional Application Data, Profile suspense, ISIR file data, Fund Management reports, CU custom pages,

**View** access to Award letter and Award Views, Loans, Disburse Aid, Satisfactory Academic Progress, ACG/SMART, Aggregates, Set Up tables, Search /Match, Bio/Demo pages, ISIR Suspense, & FA History

**FA Processors (program and application) - Update** access to FA Term, Awarding pages, Mass Packaging, Budget, ISIR Correction, Profile suspense, ISIR file data, Pell Payment, Loans, ACG/SMART, Aggregates, Fund Management reports, CU custom pages,

**View** access to Award letter and Award Views, Institutional Application Data, Disburse Aid, Satisfactory Academic Progress, Set Up tables, Search/Match, Bio/Demo pages, ISIR Suspense, & FA History

**FA Customer Service - Update** access to FA Term, Awarding pages, Mass Packaging, Budget, ISIR Correction, Profile suspense, ISIR file data, Fund Management reports, CU custom pages,

**View** access to Award letter and Award Views, Institutional Application Data, Loans, ACG/SMART, Aggregates, Satisfactory Academic Progress, Set Up tables, Search/Match, Bio/Demo pages, ISIR Suspense, & FA History

**FA Program Manager - Update** access to FA Term, Awarding pages including Professional Judgment, Budget, Profile suspense, ISIR file data and ISIR Correction, Fund Management reports, Pell Payment, Loans, ACG/SMART, CU custom pages, ACG/SMART & Service Indicator access

**View** access to Award letter and Award Views, Institutional Application Data, ISIR suspense, Disburse Aid, ACG/SMART, Aggregates, Set Up tables, StudentServicesCenter, Search/Match, Bio/Demo pages, & FA History

**FA Business Manager - Update** access to FA Term, Awarding pages w/out Professional Judgment, Institutional Application Data, ISIR file data, CU custom pages, ACG/SMART

**View** access to Award letter and Award Views, Budget, Profile suspense, ISIR file data and ISIR suspense, Loans, Disburse Aid, ACG/SMART, Aggregates, Fund Management, Set Up tables, StudentServicesCenter, Search/Match, & FA History

**FA IT staff - \*RESTRICTED\*** Correction/Update access to Awarding pages, Satisfactory Academic Progress pages

**Update** access to FA Term, Early Financial Aid Awards, Institutional Mass Packaging, Restricted Aid, Financial Aid Notification Select & Create process, Aggregates (update limited, mostly view access), Budget processes, Federal App Data, ISIR Correction & Simulation, ISIR File Data & Suspense, Profile Suspense, CU pages & processes.

**View** access to FA pages on Student Services Center, Budget pages, Fund Management pages, Award views, Institutional Application Data pages, Search /Match & Bio/Demo pages, FA History, Disbursement views.

Fund Management reports, Self Service Awarding, Pell pages & processes, Loans, Return to Title IV funds, ACG/SMART pages & processes, Maintain User Edits w/in Disbursement, Disbursement processes & reports, Satisfactory Academic Progress processes

**FA Production Control (CIT) -** A role created for the individuals in CIT's Production Control area who will be running certain mass processes

**FA Endowed Scholarship Coordinator - Update** access to Awarding pages including Professional Judgment, Financial Aid Notification Select & Create process & Award letters, Budget, ISIR file data, Fund Management reports, CU custom pages, ACG/SMART & Service Indicator access

**View** access to FA Term, Award Views, Institutional Application Data, ISIR Correction & ISIR suspense, Profile suspense, Loans, Disburse Aid, ACG /SMART, Aggregates, Set Up tables, StudentServicesCenter, & FA History.

**FA Account Reps - Update** access to Awarding pages (student & departmental) w/out Professional Judgment, ISIR file data, Fund Management reports, CU custom pages, ACG/SMART & Service Indicator access

**View** access to FA Term, Award Views, Budget, Institutional Application Data, ISIR field audit pages, Profile suspense, Loans, Disburse Aid, ACG/SMART, Aggregates, Set Up tables, StudentServicesCenter, & FA History.

**FA Asst (Graduate Central) - Update** access to Departmental and Student award, Aggregates, Budget, ISIR data w/correction & correction management, Fund Management reports (select) **View** access to FA Term, Profile suspense, Loan processing, FA Setup tables and custom Graduate Earnings page.

**FA Administrative Aid - Update** access to Awarding pages (student & departmental) w/out Professional Judgment, ISIR file data, Fund Management reports, CU custom pages, ACG/SMART & Service Indicator access

View access to FA Term, Award Views, Budget, ISIR Correction & File Data, ISIR field audit pages, Profile suspense, Loans, Disburse Aid, ACG/SMART, Aggregates, Set Up tables, StudentServicesCenter, & FA History

**FA Graduate Field-** Update access to Departmental award entry View access to FA View only pages, Student Service Center Financial Aid page, FA Setup tables and custom Graduate Earnings page.

**FA Prof/Grad Director-** Update access to Departmental and Student award, Perform Mass Action, Budget, ISIR data w/correction & correction management, Fund Management reports (select), Profile loaded & suspended data, Service Indicator H06/FA1 View access to Bio/Demo, Aggregates, FA Term, ISIR suspended data, Loan processing, FA Setup tables and custom Graduate Earnings page.

**FA Prof/Grad Asst Director Counselor -** Update access to Departmental and Student award entry, Budget, ISIR data w/correction & correction management, Fund Management reports (select), Profile loaded & suspended data, Service Indicator H06/FA1 View access to Bio/Demo, Aggregates, FA Term, ISIR suspended data, Loan processing, FA Setup tables and custom Graduate Earnings page.

**FA Prof/Grad Support-** Update access to Departmental and Student award, Aggregates, Budget, ISIR data w/correction, Fund Management reports (all), Profile loaded & suspended data View access to Bio/Demo, FA Term, ISIR suspended data, Loan processing, FA Setup tables and custom Graduate Earnings page.

**FA Student -** Update access to FA Term page and Comment entry.

View access to limited Awarding pages, Aggregates, Budgets, Award letter data, and FA pages of StudentServicesCenter.

**FA Item Type & Transactional View with Comment entry -** Role created for Commitment & State Programs staff.

**FA View All -** \*RESTRICTED\* Base role to provide user with View access to FA summary and inquiry pages as well as the Financial Aid tab in Student Service Center.

**FA Athletics -** Allows user to identify recruited/ ECR athletes through Campus Community pages.

**FA Base Access -** This role contains access to pages every FA employee should receive; Financial Aid Status, Financial Aid Packaging Status page, User defaults, and FA page in Student Services Center page.

**FA 3Cs Access --** Update access to Comments, Checklists, and Communications.

**FA Person Add -** Limited FA staff will be assigned this role for purposes of adding/updated people data and relationships for loan processing.

**FA Institutional Application access -** Role gives user Update access to just Inst App pages.

**FA Full Access --** This role should be assigned to super users only, staff who should have setup and correction access. Access includes Setup table update access, ability to run all processes, add person data, and 3 tier access.

**FA Bursar Access-** Role created for Bursar staff; View term Award Summary & View Financial Aid Status pages access.

**FA Admission View Access -** View role created for Admissions staff; View term Award Summary & View Financial Aid Status pages access.

**FA Admission Update Access -** Role created for Admissions staff; Update/Display All access to CU Packaging Variables; View term Award Summary & View Financial Aid Status pages access

**FA Admission ACG Access -** Update access to ACG/SMART Grant Eligibility pages. Members of the Admissions office need access to FA pages to enter eligibility data from student's transcript.

**FA Student Center-** Role to provide user with access to Financial Aid tab in Student Service Center.

**FA Graduate Field-** Update access to Departmental award entry  
View access to FA View only pages, Student Service Center Financial Aid page, FA Setup tables and custom Graduate Earnings page.

**FA Setup Grad -** Role created for Graduate School to maintain setup for Grad Job Code Table related to Custom Graduate Earnings page.

**FA ISSO Access -** Role created for ISSO staff. Update access to Student Award processing, Comment entry (FINA), View access to Budget, Profile data, Aggregates, and Load Processing.

**FA Limited Awarding-** Gives user Update access to Departmental awarding pages and View access to Awarding views. Currently assigned to CCTS staff.

**FA Disbursement by Bursar -** \*RESTRICTED\* Role created giving Update access to Disbursement Override page to limited Student Financial Staff.

**FA Disbursement by FASE --** \*RESTRICTED\* This role should be assigned to FASE users, who need access to the Disbursement Authorize page.

#### **SETUP/TOOLS RELATED ROLES**

**FA 3Cs Setup -** Correction/Update access to 3C setup tables.

**FA 3C Setup View -** View access to 3C setup tables

**FA Setup View -** View access to Financial Aid setup tables

**FA Item Type Setup -** Update access to Financial Aid and Fiscal Item Types

**FA Query View --** Access to run canned queries through the Query Viewer

**FA Query Full** -- Create/edit access to Query Manager

**FA3TPTADQ** -- People Tools, 3 Tier App Designer, Tree Manager, and 3 Tier Query access.

**FA3CPROC** -- Access to 3C processes; including custom 3C processes

**FAPROC** - Update access to custom pages and process.