TRANSFER STUDENTS TO FINANCIAL AID

Select **Transfer Students** from the **Maintenance** menu to open the **Transfer Students to Financial Aid** window (figure 5-1). Any student with a record in ADMISSIONS, ENROLLMENT MANAGEMENT or ACCOUNTS RECEIVABLE is available to be transferred into FINANCIAL AID, provided they do not currently have a financial aid record for the award year you select. You can limit which records are transferred, based on the options and/or query you select.
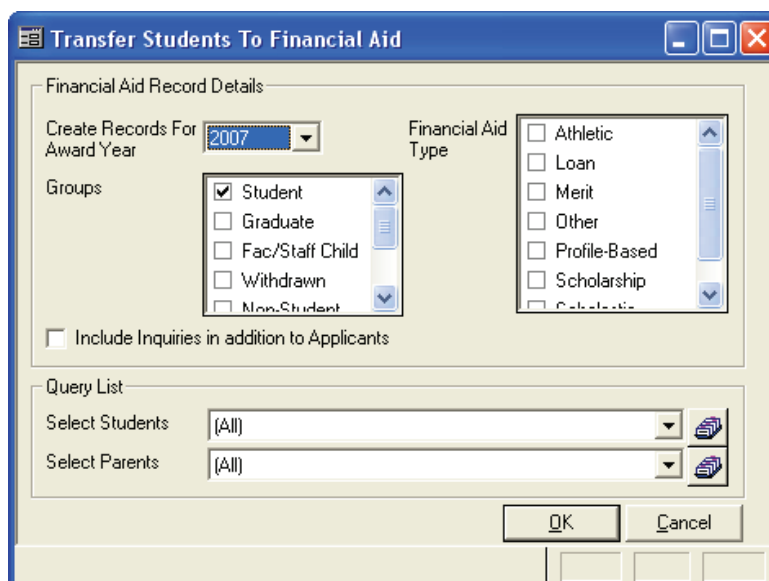

Figure 5-1. Transfer Students to Financial Aid.

Financial Aid Record Details.

- **Create Records For Academic Year.** Select the financial aid year in which you want to create records. You can choose the current year, the next year, or two years in the future.

- **Groups.** You can select one or more student groups as a criterion for record selection. If you do not select any groups, all students will be selected.

- **Financial Aid Type.** You can select one or more financial aid types as a criterion for record selection. If you do not select any types, all students will be selected. This selection references the *Type* field in the **Student Maintenance** *Financial* Tab in ADMISSIONS, ENROLLMENT MANAGEMENT or ACCOUNTS RECEIVABLE.

- **Include Inquiries in addition to Applicants checkbox.** When checked, includes admissions inquiries, as well as applicants to FINANCIAL AID.

Query List. You can use queries to select students and parents for the transfer. The *Select Students* query allows you to retrieve students based on some of the fields that might be related to financial aid. The *Select Parents* query criteria are based on **Address**

Maintenance records. Select each query from a drop-down list or click **Search** 🖫 to access the **Query List**. To understand how to use query parameters, please refer to *Appendix A: Query System*.

Once you click **OK**, the transfer process will be initiated and a list of the students to be transferred will be printed. A message is displayed upon successful printing of the Transfer Students to Financial Aid report (figure 5-2). None of the students have actually been transferred at this time. ***Senior Systems, Inc.*** recommends that you review the report to make sure that there are no data entry errors before proceeding.
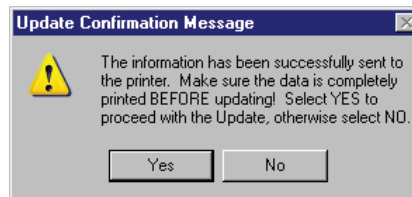

Figure 5-2. Update Confirmation.

- If you need to go back and make corrections to the batch, click **No**. This returns you to the **Transfer Students to Financial Aid** window. You can then close the window and make any necessary changes before proceeding with the transfer.
- If the report is correct, click **Yes**.

Once you click **Yes** in the **Update Confirmation Message**, students will be added to **FINANCIAL AID**.

Transfer Students To Financial Aid

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TRANSFER NO: 1								
FAMILY I.D.	**STUDENT I.D.**	**NAME**		**G R O U P**			**APPLICANT TYPE**	**F/C**
0000077	0000012	Jessica Kim Lamothe	6	F	D		Student	N
0000099	0000010	Bartholomew Cubbins	9	M	B		Student	N
0000102	0000016	Rebecca Sharpe	10	F	D		Student	N
0000104	0000014	Thaddeus Quincy Pollack	8	M	D		Student	N
ARG10	ARG101	Jason Aristos Argonis	12	M	B		Student	N
	ARG102	Penelope Adria Argonis	10	F	B		Student	N
	ARG103	Theodore Perseus Argonis	9	M	B		Student	N
BAT11	BAT118	Charles William Boviard	10	M	B		Student	N
	BAT119	Susan Cecilia Bates	11	F	B		Student	N
BRI20	BRI201	Joseph Robert Briggs	10	M	B		Student	N
COP20	COP201	Danielle Davis Copperfield	10	F	B		Student	N
CRE20	CRE201	Sara Emily Crewe	10	F	B		Student	N
KEE10	KEE102	Alexa Prudence Keeton	10	F	B		Student	N

Total Number in List: 13

Figure 5-3. Transfer Students to Financial Aid report.