

How to View Loans and Assign Them to Loan Aid Funds in BSAC (Fund Administrator's Version)

1. The counsellor will have used Minerva to create a generic loan offer:
 - a. Including payment method to fees, cheque, loan or combination of the above.
 - b. When they saved, this info is pushed to BSAC INB forms. You view it by logging into BANNER INB using your ORACLE ID (e.g. for Jane it is 'JAMRO') and password.
 - c. At this point the loan has been created in a generic state (not attached to a FOAPAL) and the student will not see it on the WEB yet

In INB you can see the student's loan and other awards on several forms: **KVIASUM**, **KVAAWRD**, **KVISAWK**, and/or **KVIAWRD**. All these forms show similar data but it is displayed differently and some show more than others. If the loan has been offered and not assigned to a loan fund then:

- The loan will be in OFFR aid fund status
- The loan aid fund code assigned will be of format X_%LOAN% and the description will be of format Generic%Loan%
- Date inserted and user id of the counsellor will appear on the record.

Create Award

General information

Full name: [Redacted]	Citizenship: Canada	Stdn Fee Res.: Q
McGill ID: [Redacted]	Imm. Status: [Redacted]	Landing date: N/A
SIN: [Redacted]	POCS: Proof Received	CIC Client ID: [Redacted]
Perm. code: [Redacted]	PORS: #1 -Born in Quebec	PORS Expiry: N/A
E-Mail: [Redacted]	Visa #: [Redacted]	Visa Expiry: N/A
Birth date: 08/17/1981	CAQ #: [Redacted]	CAQ Expiry: N/A

Permanent address

[Redacted]
Montréal QC Canada [Redacted]

Phone: [Redacted]

Academic information

Winter 2008 -- Full-time / Year 2	Fall 2008 -- NOT REGISTERED	Winter 2009 -- NOT REGISTERED
Program: B Arts Honours	Program: B Arts Honours	Program: B Arts Honours

Latest Admission Information

Term: 200609	Fee Res.: Q
AppNo.: 1	Degree: Bachelor of Arts
App. Status: Offer of Admission Accepted	Faculty: Faculty of Arts
Country: Canada	Campus: Downtown
Type: Mature Admission	Scholarship.: Applied for Basic Scholarship

Create Award - Microsoft Internet Explorer

Address: https://ceres.cc.mcgill.ca:4475/dev5/bzkkawrd.P_Display_Form

*** Aid Type:** Loan

*** Amount:** 3000

Period

	Start	End
* Award Term Range:	200805	200805 - Summer 2008
* Award Date Range:	08/30/2008	08/31/2008

Other

*** To Review:** N

*** Due Date:** 08/31/2008

*** Interest Rate:** 6.50

Disbursement Schedule

* Method	* Term	* Amount	* Date	* Loan Balance
To Fees	200805	1000	08/30/2008	
To Cheque	200805	1000	08/30/2008	
To Loan	200805		08/30/2008	

Balance: \$1,000.00, Due: 2008/08/31, McGill University Student

Add Disbursement

Done Internet

2. **KVISAWK:** Type the aid year and period ('YEAR') in the key block and CTRL/PGDN or click next block. When inside the next block, Press F7. Type X_%L% in the aid fund code and press F8. **Note:** This form shows a large amount of very useful information including the FOAPAL, whether and how much of the aid has already been paid, and comments. Comments, User ID and date inserted are **to the far right of the scrollable section**. For purposes of finding loans to be assigned for the day you do not need to see most of this information. However the comments may be useful in deciding which aid fund to use for this student.

Quick Tip #1: If you position your cursor on the student you are processing next in KVISAWK, his ID and Aid year will default into KVAAWRD for you.

3. The X% loans on KVISAWK are the loans you have to assign and process. (Type X% to see all the awards that need assigning, including scholarships, bursaries and fellowships). You can screen print this form to have a hard copy or you can ask Angie/Thierry to write a report if this becomes important. The HELP/EXTRACT DATA function currently *does not work properly* - it will download everything (huge and hangs the system) - not just the X% funds you selected.

Quick tip #2: F5 and type in form name KZIFDQY in order to help you to choose an aid fund code for the student you have chosen to process next.

4. **KZIFDQY:** use this form to find aid funds that fill the criteria for the aid that was offered by the counsellor and which have remaining balances. E.G. you could search of an in-course loan as follows:
 - a. Choose a loan fund source code
 - b. Make sure if it is a loan you choose need based (2) as award basis
 - c. Choose a fund balance amount that can at least cover the loan that was offered
 - d. In next block you can stipulate property codes that will ensure that you are choosing the right kind of award and that your list is not too long. You can stipulate fund text entries here also in order to find a fund, say, especially for medicine students.

Note: if the counsellor made comments on the award record about the student, these can be seen on KVISAWK/KVIASUM/KVAAWRD). They may be used to help you decide which aid fund code to assign to the student. If the aid fund code has been defined with fund text to help in matching, then you can search for it as shown above. Also you can look at student attributes such as program of study on Minerva query forms.

Below is an example of how fund text for REQUIRED value would appear on Lacey Aid Fund:

Choose from awards showing on the previous screen (chose Lacey for our example). Finish off the splitting by exiting out of KVIFDQY. Go to KVAAWRD.

5. **KVAAWRD:** If not defaulted in, type in the student's ID, aid year and period ('YEAR') and do **next block** (ctrl/pgdn). If you do not notice the X% loan you are looking for immediately you can search for it using X%L%. **Note:** much info is viewable on a multi-lined block. For some info you need to go to other tabs. The USER ID is evident immediately. **This form shows you all possible data but there are only 2 awards per page and you need to really understand how to navigate through it.** For full understanding of this form refer to [How to Award Institutional Financial Aid](#) (available soon).

Interesting things to note:

- a. The loan in offer stage is not displayable on the Web to the student
- b. Comments appear on the right. **These may display instructions or characteristics of the student important in choosing the finance fund to assign so read these carefully.**
- c. The second last TAB (Aid Fund-Aid ...) shows properties that are associated to the kind of aid being offered. When you assign a Finance fund to the offered loan you must respect these properties in your choice of aid fund.

The screenshot displays the Oracle Developer Forms Runtime interface for the KVAAWRD form. The window title is "Oracle Developer Forms Runtime - Web: Open > KVAAWRD". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various navigation and editing icons. The main form area is titled "Applicant Institutional Award [1.0] KVAAWRD 7.3 [1.6] (BANDEV5)".

At the top, there are input fields for "ID:" (with a dropdown), "Aid Year:" (0708), and "Aid Period:" (YEAR). A checkbox for "Third Party Contract" is also present. Below these are several tabs: "Applicant Inst...", "Applicant Dis...", "Errors/Alerts...", "Schedule Def...", "Fund Disburs...", "Applicant Thi...", and "Fund Base D...".

The main form area is divided into several sections:

- Aid Fund Code:** L425007C00 (Alma Mater Loa)
- Aid Fund Status:** ISSU (~ Issued *old code use APP)
- Aid Fund Status Date:** 08-MAY-2008
- Original Offer Amount:** 2,000.00
- Offer Amount:** 2,000.00
- Accepted Amount:** 2,000.00
- Decline Amount:** (empty)
- Cancel Amount:** (empty)
- Original Offer Date:** 08-MAY-2008
- Offer Date:** 08-MAY-2008
- Accepted Date:** 08-MAY-2008
- Decline Date:** (empty)
- Cancel Date:** (empty)
- Aid Fund Code Sequence Number:** 1
- Web Origin:** (unchecked)

Below this, there is another section for a different aid fund:

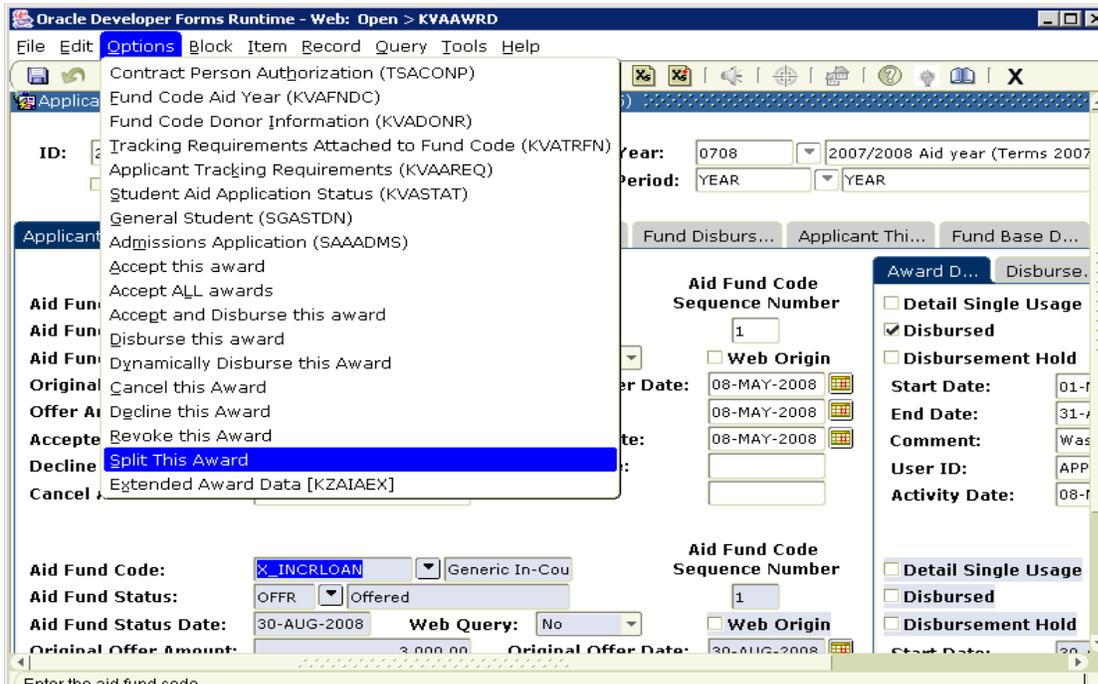
- Aid Fund Code:** X_INCRLOAN (Generic In-Cou)
- Aid Fund Status:** OFFR (Offered)
- Aid Fund Status Date:** 30-AUG-2008
- Original Offer Amount:** 3,000.00
- Original Offer Date:** 30-AUG-2008
- Aid Fund Code Sequence Number:** 1
- Web Origin:** (unchecked)

On the right side, there is a "Award D..." pane with a "Disburse..." button. It contains several checkboxes and fields:

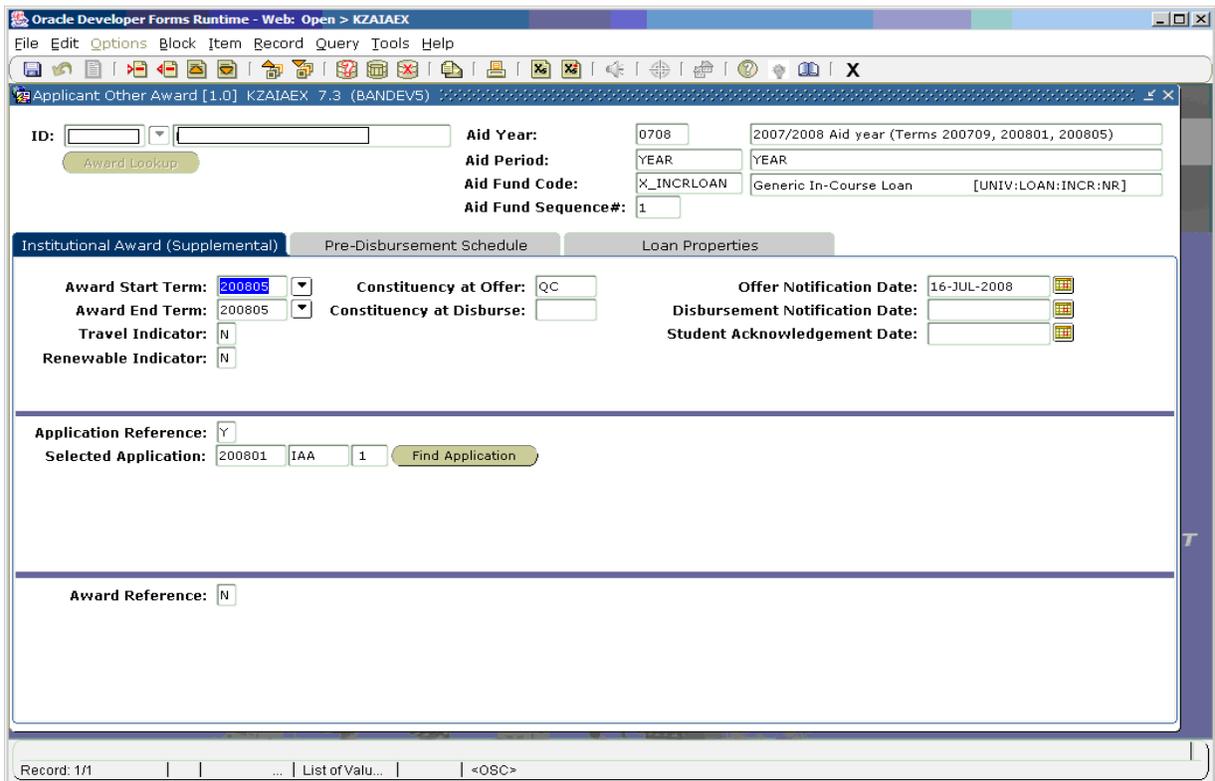
- Detail Single Usage
- Disbursed
- Disbursement Hold
- Start Date:** 01-F
- End Date:** 31-A
- Comment:** Was
- User ID:** APP
- Activity Date:** 08-F

At the bottom of the form, there is a prompt: "Enter the aid fund code."

6. **KVAAWRD** – Splitting the loan (i.e. assigning a FOAPAL)
 - a. Choose the 'split this award' option from the Options menu.
 - b. You will be presented with a screen to use to enter your assigned award.



When you split the award you will be presented with this intermediate screen where you can see the characteristics of the loan that was offered:



Oracle Developer Forms Runtime - Web: Open > KYAAWRD

File Edit Options Block Item Record Query Tools Help

Applicant Other Award [1.0] KZAIAX 7.3 (BANDEV5)

ID: **Aid Year:** 0708 2007/2008 Aid year (Ter

Aid Period: YEAR YEAR

Aid Fund Code: X_INCRLOAN Generic In-Course Loan

Aid Fund Sequence#: 1

Institutional Award (Supplemental) Pre-Disbursement Schedule **Loan Properties**

Contract ID: 20822989901

Due Date: 31-AUG-2008

Interest Rate: 0.06500

To Review:

The pre-disbursement schedule tab will show you what disbursement method(s) and amounts the counsellor had chosen for the student (not shown here) – see step 9.

- Get out of KZIAEX by clicking X in corner of form and you see to the screen where you actually assign your new loan that you chose on form KZIFDOY. See below.

Oracle Developer Forms Runtime - Web: Open > KZIAEX - KVAAWRD

File Edit Options Block Item Record Query Tools Help

Applicant Institutional Award [1.0] KVAAWRD 7.3 [1.6] (DBAN4)

ID: Aid Year: 2008/2009 Aid year (Terms 200809, 200901, 200905)

Third Party Contract Aid Period: YEAR YEAR

Split Award KVAAWRD 7.3 [1.6] (DBAN4)

Source Applicant Institutional Award

Source Aid Fund Code: X_INCRLOAN Generic In-Course Loan [U] Offer Amount:

Source Aid Fund Code Sequence Number: 1 Offer Date: 20-OCT-2008

Source Aid Fund Status: OFFR Accepted Amount:

Source Aid Fund Status Date: 20-OCT-2008 Offered Accepted Date:

Target Institutional Awards

Target Aid Fund Code	Target Aid Fund Status	Offer Amount	Offer Date	Accepted Amount	Accepted Date
L425049C00 Lacey Loan	OFFR Offered	3,000.00	20-OCT-2008		

Split this award Cancel

Enter the aid fund code. Record: 1/1 ... List of Valu... <OSC>

You will be brought back to the first tab on KVAAWRD and see your newly assigned award where the X%L% one used to be:

Oracle Developer Forms Runtime - Web: Open > KZAIAX - KYAAWRD

File Edit Options Block Item Record Query Tools Help

Applicant Institutional Award [1.0] KYAAWRD 7.3 [1.6] (DBAN4)

ID: Aid Year: 2008/2009 Aid year (Terms 200809, 200901, 200905)
 Third Party Contract Aid Period: YEAR YEAR

Applicant Inst... Applicant Dis... Errors/Alerts... Schedule Def... Fund Disburs... Applicant Thi... Fund Base D... Aid Fund-Aid ... Identification ...

Aid Fund Code: X425049C00 Lacey Loan Aid Fund Status: OFFR Offered Aid Fund Status Date: 20-OCT-2008 Web Query: Yes Original Offer Amount: 3,000.00 Offer Amount: 3,000.00 Accepted Amount: Decline Amount: Cancel Amount:	Aid Fund Code Sequence Number 2 <input type="checkbox"/> Web Origin Original Offer Date: 20-OCT-2008 Offer Date: 20-OCT-2008 Accepted Date: Decline Date: Cancel Date:	Award D... Disburse... GL Bann... Source A... <input type="checkbox"/> Detail Single Usage <input checked="" type="checkbox"/> Disbursable <input type="checkbox"/> Disbursed <input type="checkbox"/> Eligibility Overridden <input type="checkbox"/> Disbursement Hold <input type="checkbox"/> Bill Indicator Start Date: 01-SEP-2008 End Date: 31-AUG-2009 Comment: User ID: CWORKM Activity Date: 20-OCT-2008 12:0
Aid Fund Code: X_INCRBURS Generic In-Cou Aid Fund Status: CANC Cancelled Aid Fund Status Date: 19-OCT-2008 Web Query: No Original Offer Amount: 2,500.00 Offer Amount: 0.00 Accepted Amount: 0.00 Decline Amount: Cancel Amount:	Aid Fund Code Sequence Number 1 <input type="checkbox"/> Web Origin Original Offer Date: 19-OCT-2008 Offer Date: 19-OCT-2008 Accepted Date: 19-OCT-2008 Decline Date: Cancel Date:	<input type="checkbox"/> Detail Single Usage <input type="checkbox"/> Disbursable <input type="checkbox"/> Disbursed <input type="checkbox"/> Eligibility Overridden <input type="checkbox"/> Disbursement Hold <input type="checkbox"/> Bill Indicator Start Date: 19-OCT-2008 End Date: 30-APR-2009 Comment: User ID: WWW_USER408 Activity Date: 19-OCT-2008 17:4

Enter the award amount that applicant has accepted.

Record: 5/13 <OSC>

KVAAWRD – You can see what the source aid fund/award was on the far right-hand lower level tab of KVAAWRD

Oracle Developer Forms Runtime - Web: Open > KZAIAX - KVAAWRD

File Edit Options Block Item Record Query Tools Help

Applicant Institutional Award [1.0] KVAAWRD 7.3 [1.6] (DBAN4)

ID: Aid Year: 2008/2009 Aid year (Terms 200809, 200901, 200905)

Third Party Contract Aid Period: YEAR YEAR

Applicant Inst... Applicant Dis... Errors/Alerts... Schedule Def... Fund Disburs... Applicant Thi... Fund Base D... Aid Fund-Aid ... Identification ...

Award D... Disburse... GL Bann... Source A...

Aid Fund Code: L425049C00 Lacey Loan **Aid Fund Code Sequence Number** 2

Aid Fund Status: OFFR Offered

Aid Fund Status Date: 20-OCT-2008 **Web Query:** Yes **Web Origin**

Original Offer Amount: 3,000.00 **Original Offer Date:** 20-OCT-2008

Offer Amount: 3,000.00 **Offer Date:** 20-OCT-2008

Accepted Amount: **Accepted Date:**

Decline Amount: **Decline Date:**

Cancel Amount: **Cancel Date:**

Aid Fund Code: X_INCRBURS Generic In-Cou **Aid Fund Code Sequence Number** 1

Aid Fund Status: CANC Cancelled

Aid Fund Status Date: 19-OCT-2008 **Web Query:** No **Web Origin**

Original Offer Amount: 2,500.00 **Original Offer Date:** 19-OCT-2008

Offer Amount: 0.00 **Offer Date:** 19-OCT-2008

Accepted Amount: 0.00 **Accepted Date:** 19-OCT-2008

Decline Amount: **Decline Date:**

Cancel Amount: **Cancel Date:**

Description of the fund status code.

Record: 5/13 <OSC>

Source Aid Fund Code X_INCRLOAN Generic In-Course Loan

Source Aid Fund Code Sequence Number 1 **Source Offer Amount** 3,000.00

Source Offer Date 20-OCT-2008 **Comment**

Source Aid Fund Code **Source Offer Amount**

Source Aid Fund Code Sequence Number **Source Offer Amount**

Source Offer Date **Comment**

- The student must then accept the loan on the WEB ('My Financial Aid and Awards' on the Financial Aid menu) before someone in Student Aid can disburse it. (example below shows a Lacey Loan of \$1000 being offered).

Financial Aid and Awards

Aid Year: 0809 | Aid Period: YEAR

This is the list of awards that you have applied for or been assigned.

If you have been offered a McGill loan by the Student Aid Office you will have the opportunity to view the terms and conditions of the loan contract prior to accepting the loan by clicking on **Proceed**.

Institutional Awards

My Student Aid

Description	Amount	Offer Date	Status	Accept/Decline Date
MELS Travel Bursary	\$ 00	25-JUN-2008	Rescinded	
MELS Travel Bursary	\$6,000.00	05-AUG-2008	Approved	05-AUG-2008
Deferral based on aid from BC		17-OCT-2008	Cancelled	
Deferral based on aid from YK		17-OCT-2008	Cancelled	
Deferral granted by ISS		17-OCT-2008	Cancelled	
Deferral granted by ISS		19-OCT-2008	Cancelled	
Alma Mater Loan	\$3,000.00	21-AUG-2008	Assigned	21-AUG-2008 Print Contract
Lacey Loan	\$1,000.00	20-OCT-2008	Offered	<input type="button" value="Proceed"/> <input type="button" value="Decline"/>

[View My McGill Loan Activity](#) [Select Different Aid Year](#)

RELEASE: 7.3 [1.0]

- When the disbursing is done, the original disbursement schedule that was defined by the counsellor will be available to the disburser. It will show up during the disbursement process but can also be viewed prior to this on form KZAIAX:

Oracle Developer Forms Runtime - Web: Open > KZAIAX

File Edit Options Block Item Record Query Tools Help

Applicant Other Award [1.0] KZAIAX 7.3 (BANDEV5)

ID: **Aid Year:** 0708 2007/2008 Aid year (Terms 200709, 200801, 200805)

Aid Period: YEAR YEAR

Aid Fund Code: L425049C00 Lacey Loan [UNIV:LOAN:INCR:NR]

Aid Fund Sequence#: 1

Institutional Award (Supplemental) Pre-Disbursement Schedule Loan Properties

Sequence Number	Disbursement Term	Posting Method	Payment Date	Loan Balance to Pay	Payment Amount
1	200805	Accounts Receiv...	30-AUG-2008		1,000.00
2	200805	Accounts Payable	30-AUG-2008		1,000.00
3	200805	Loan Balance	30-AUG-2008	26022989920070901	1,000.00
Payment Sum:					3,000.00

Record: 1/3 ... <OSC>