R G M

R. Gonzalez Management, Inc.

Quick RGM System Reference/Guide 2017-2018

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TITLE

Introduction

Welcome To RGM

This introductory guide is intended to give you, the "USER", a visual guide of the RGM Web System. The Modules, Transactions (TRX), Functions and Reports will be explained in this guide. This guide was designed as a graphic overview of the system using a flow chart for each module.

As you read through this guide, you will learn the important elements of each module.

Administrators may generate annual reports due to an accrediting agency, state agency, IPEDS and for the Department of Education such as NSLDS and GE reporting.

Recruiters create a lead and follow their actions during the entire recruiting process. If needed, the student may be referred to Financial Aid to complete the FAFSA form that will assist the student in the enrollment decision.

Admissions personnel can track the student admissions process with documentation, tests, enrollment information and attendance schedules. Students' picture is part of the student profile with the use of an acceptable digital camera. An enrollment agreement may be printed from the system along with multiple admissions reports.

Registrars may track an enrolled student with the course length, hours (credit or clock), subjects, exams, operations, competencies and other required tasks. Attendance may be processed using the RGM biometric finger print reader time clock or other electronic devices. Grades, SAP evaluations, progress reports and transcripts can be tracked/printed. Attendance can be reviewed and printed by students for a period of the last four weeks of recorded detail attendance. Multiple reports are available to track students activities, status, IPEDS multiple annual reports, SAP reports, attendance reports and many more useful administrative reports

Financial Aid Officers may enter data from the FAFSA and send it to CPS; however, institutions are strongly advised to implement the use of FAFSA on the web in order to provide the families with the great tool to retrieve IRS data. A FAO may additionally, record any Professional Judgment or Dependency Override, print any revised ISIR received, document any verification process by following the system items that need to be verified in accordance to the verification group assigned to the student. Corresponding verification group forms would be provided by the system. "C" comments as required on the ISIR, could be document with the institutional action to clear the comments listed, and request revised ISIR's, make financial aid awards, test SAP per institutional SAP policy using the system internal controls per the school policies and procedures, other eligibility requirements would be tested before the FAO authorize Title IV disbursements. Based on these internal controls, the financial aid officers can see what checks are payable and due to students, an in cases where the student check is on hold, the reason for the holding is provided to the financial aid department for subsequent corrections. Multiple financial aid reports and reminders are provided to assist the financial aid officer and school administrators in their daily chores. NSLDS and GE reporting is also included in the services.

Fiscal Officers may print approved Title IV disbursement (check or vouchers) and track all charges and payments while keeping a secure audit trail in the accounting transactions. The system provides administrators with a daily remainder of any credit balances, refunds or post withdrawal disbursements due including amount, aid program and due date. If the student is terminated by the registrar office, the system will (if the student is a Title IV recipient) calculate Return of Title IV to determine any unearned funds that need to be returned or post-withdraw payment from Title IV that need to be advanced to students. In addition, when the student is terminated, the system would apply the institutional refund policy to determine any refunds due or any balances due from the student. Fiscal officers may print an accounts receivable report, 90/10 calculation report, fiscal operation report, billing letters, cash flow and other helpful reports as often as needed. A full set of Blue Book subsidiary ledgers are maintained by the system.

Placement Personnel can track future needs of externships/placement positions and track placement efforts on each student. A gainful employment report may be generated from the admission annual report section to provide a school an idea of their current status and position on that reporting requirements.

Default Prevention Officials may use the system to assist students having difficulties in meeting their student loan obligations. In addition, institutions may use reports from this module to exchange data with their assigned agency working with your loan borrowers.

The entire function of the RGM system is a web-based integrated database with multiple checks and balances to secure its accuracy, integrity and reliability of the system.

Thank you for the opportunity to be of service to your school.

Rafael Gonzalez
President

The RGM System Modules

Administration TRX No. 1000s
Internal controls – A new client to RGM, is requested to provide a current catalog, state and accreditation approvals, USDE ECAR and PPA. From these documents, RGM staff will set Administrative System controls. See Administrative Reports provide under this module.

Recruiting TRX No. 2000s
Follow prospective leads, staff activities, lead status and individual recruiter's performance and percentages that are displayed in the recruiting reports.

Admissions TRX No. 3000s
Admissions Process – Once the recruiting process is completed, the prospective lead is moved to admissions as a student. At this point all admissions activities are tracked. The student key number is assigned by the system, a photo is added to the student profile for future ID reference, and the student record is added to the various admission reports.

Registrar TRX No. 4000s
Registrar module tracks attendance, operations, tasks, lessons, competencies and time in and out using RGM time clock or biometric or other system. Posting of subjects completed and grades allow the RGM system to calculate SAP procedures at each payment period. Monitors approved leave of absences and warns users of other academic related matters. Registrar reports are available for internal control.

Financial Aid TRX No. 5000s
Financial Aid Process include FAFSA application, printing ISIRS, COAs, aid awards, scheduling disbursements, reporting/reconciling originations, IPEDS, GE, COD, NSLDS, FISAP, financial aid reports, reminders, alerts and much more in student reports.

Fiscal TRX No. 6000s
Fiscal/Accounting Procedures include the printing of approved Title IV checks or vouchers, the required Blue Book ledgers to track cash transactions, cash reconciliation of Federal Aid Bank account, required Title IV program reconciliation, student tuition card, R2T4 calculations, institutional refund calculation, credit balance, post withdrawal disbursement, 90/10 report and multiple fiscal reports.

Placement TRX No. 7000s
Placement Procedures include tracking student appointments, placement activities, job referrals, state licensure data, and placement data for reports.

Default Prevention TRX No. 8000s
Default Prevention – Assistance to aid officer to prevent defaulted loans

Please Note: Modules and transactions (TRX) not applicable to the institution or not available to the user's access level, may not appear on the screen. Some TRX marked as (RGM) is limited to RGM staff. Upon school administrator request, some TRX controls will be assigned to users once they gain experience using the system.

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User Access, modules and transactions will display in accordance to each individual school needs. Those TRX marked as (RGM) will be controlled by RGM

Web Address	https://web.rgmsms.com
Initial Access	Initial User ID and Temporary password is initially set by RGM. User ID will never change, but password will be set by user
User Profile	Once you log in for the first time, the user will be prompted to provide certain personal data to set the user's profile and set your new password.
User Profile Identity Questions	Personal Profile questions: User ID Last Name First Name Mother's Maiden Name Birth Date SSN (last 4 digits) Email Address (**required on each password update**) PIN (6 digits) (**This PIN is only accessible to the user)** **(Please use a familiar number or date)** New Password Confirm the new password
Password	Every single transaction is recorded with a user ID, transaction, date, time and activity for an audit trail. **For your own protection**, do not allow other users to use the system with your password. The system will require you to update your email and change your password every (90 Days)
User Level and authorizations	SA-School Administrator is the highest level of access to all campuses and all modules. SU-School User is a lower level of a School Administrator but with certain limitations on specific transactions. CA- Campus Administrator is the highest level given to a user working with a single campus with access to all modules. CU- Campus User is a level with limitations, modules and transactions at a single campus. **Any TRX marked as (RGM) is limited to RGM user**
Module and transaction access	Module and transaction accessibility is assigned to each individual user in accordance to job title and position within the school levels and requirements

System Navigation and Flow
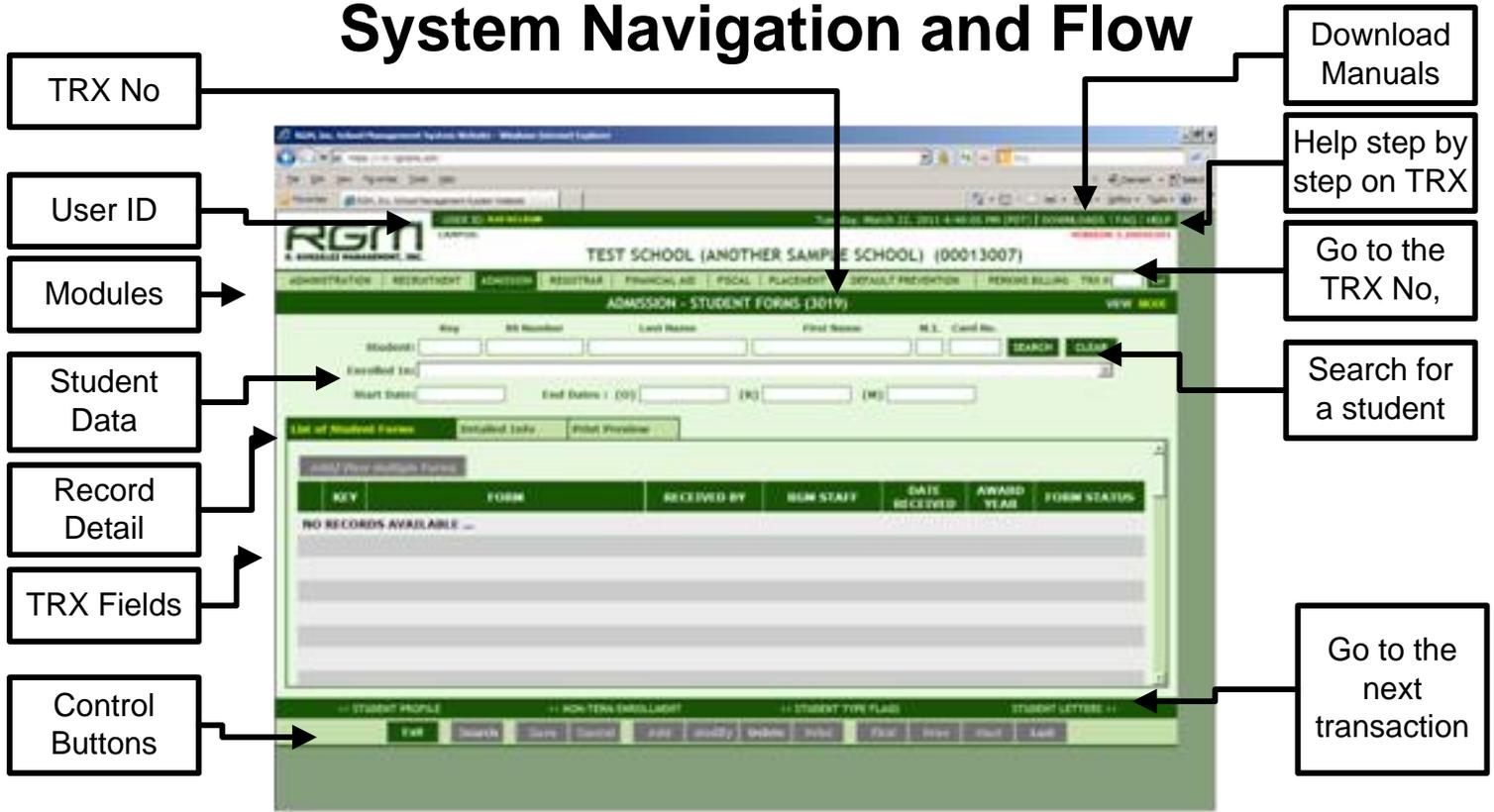
Labels pointing to the screenshot:
- TRX No
- User ID
- Modules
- Student Data
- Record Detail
- TRX Fields
- Control Buttons
- Download Manuals
- Help step by step on TRX
- Go to the TRX No,
- Search for a student
- Go to the next transaction

TRX No.	Indicates the transaction number that you are currently working with
User ID	Indicates the personal ID of the current user
Modules	The modules available to the user
Student Data	Student Key number (assigned by the system to each student at each school)
	Last Name, First Name, MI, school ID
	Enrollment number and course
	Start date, Original expected end date, revised expected end date, and Manual end date
Record Detail	On each transaction the fields would show different options
TRX Fields	On each transaction the fields would show different data entry options
Control buttons	Exit, search/Find, View, Save, Cancel, Add, Modify, Delete, Print, First view, Next view, Previous view and Last view of entries.
Downloads	Download manuals on the system (Caution: Very large files, refer to Help)
Help	Step by step instructions on any given TRX in the system
Go to TRX No.	To enter the TRX number and go directly to that screen
Search and Clear	To clear current record and search for next student. Searching without one of the student data elements, will prompt the user to select a student from a listing of all students or from a a listing from selected enrollment status
Go to the next TRX	This navigation tool indicates previous or next transaction sequence within the module that the user is currently working with

HELP FEATURES

The RGM system has Help Features to assist the user while navigating through the Web System.

RGM has two websites, each having different functions.

The RGM Website www.rgmsms.com is the website for current and prospective clients. You can access this website by clicking on the **RGM WEBSITE** link on the Web page where the user logs in to the system.
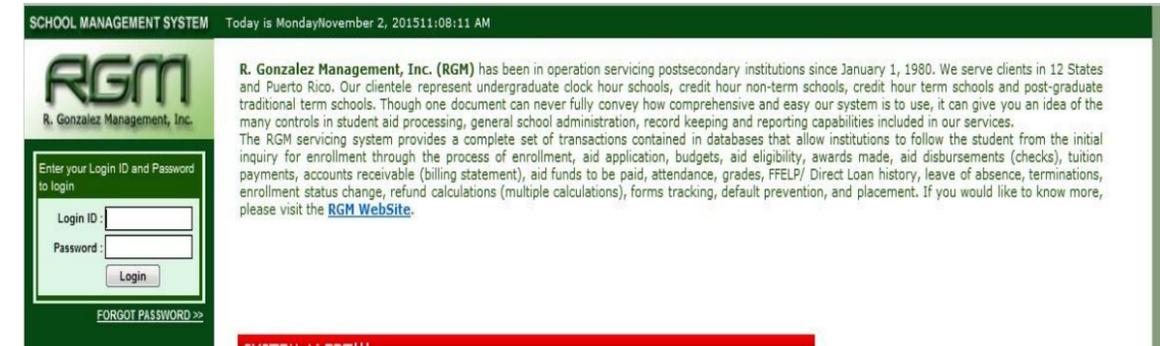
Once the RGM web page opens, you may access the **FA LINKS** (most frequently links used by the FAOs), **USEFUL LINKS** (most of the links used by school administrators) and **CLIENTS ONLY** tab located on the top row. You will need to use your assigned password for the system and you current email to have access the clients only page.

Here you will find USDE publications, helpful links, forms for clients to use as a guide to set up their internal forms and procedures. You can also download the **TRAINING VIDEOS** for the web system to the user's local computer from these sections. **RGMemos** are a reference to important matters sent to clients via their emails. This is an important information tool. **About us** is a listing of staff, their areas of responsibility, emails and extension numbers where we can be reached. **Contact us** is for new clients interested in inquiring about our services.
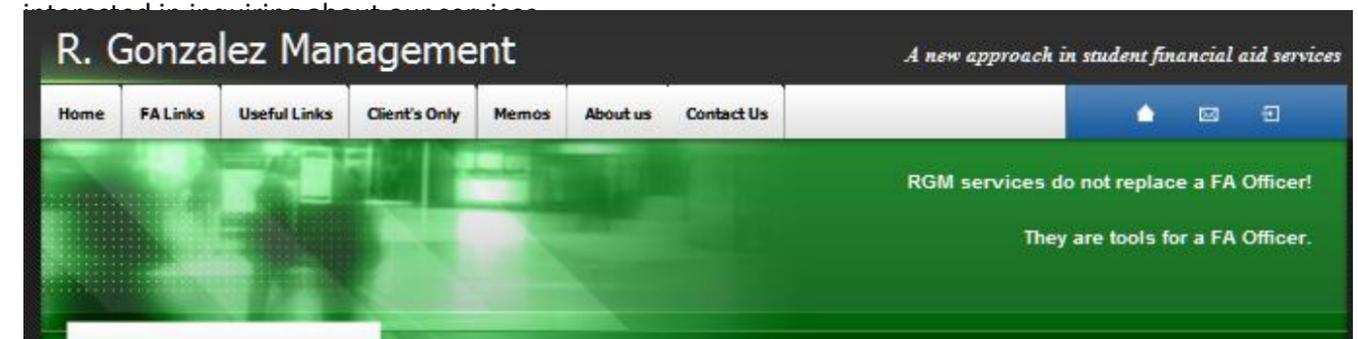
Main RGM System Web site

The RGM Web System https://web.rgmsms.com is the main link or website that schools use to process student information and generate reports.

Student Mastersheet (1 of 3)

Once a student is moved from the recruitment module to the admissions module, the student master sheet may be viewed in every module by selecting **STUDENT MASTERSHEET** from the module menu. The authorized access level assigned to each user determines which areas the user will view on the master sheet. Each area of the master sheet is described below. A user may click on the **ALL** box to view the entire contents of the master sheet (**Caution:** many pages) or select one or more sections by clicking on the specific box. The student I.D. and Pending Work listing items that need corrective actions from the school staff will appear in the section the user is viewing.

Personal Data	Student's Personal Data
Enrollment Data	Course data, dates, enrollment status, refund policy, groups, flag type, Pell payment period
Financial Aid eligibility	FAFSAs and ISIRs entered into the system or received from CPS
Payment periods	Payment periods in course of study for Pell and Direct Loan
Other Pell	Pell received at a prior school (Transfer monitoring)
Pell Eligibility Used	Amount of Pell received from prior enrollments at any school
Financial need/ awards made	Budget data including COA, EFC, and aid awards
Tuition Account	Student tuition account showing all charges, payments, balances and funds paid to student
Financial Aid disbursements	Summary of all Title IV disbursed to the student
Pell Originations	Record of Pell originations send to COD
Pell Disbursements	Record of pell disbursements sent to COD
Entrance and Exit Counseling	Record of Direct Loans Counseling
Direct Loan Originations	Record of Direct loans originated
Direct loan Disbursements	Record of Direct loan disbursements
Direct loan Changes	Record of Direct loan changes
FFELP	Record of FFELP loans posted
Delinquent Borrower Data	Records from NSLDS on delinquent Loans

Student Mastersheet (2 of 3)

Subject Completed	Record of subjects completed by the individual student
Attendance	Recorded Detailed Attendance
Cumulative hours	Cumulative postings of attendance
Leave of absence	Recorded approved leaves of absence
Satisfactory Progress	Satisfactory progress evaluations
Term Progress	Academic progress on a term based program
Terminations	Record of the student's end of enrollment by graduating or withdrawing
Return of Title IV calculation	Return of Title IV calculations done in the system upon posting of a termination
Refund Policy Calculation	Calculation of the institutional refund policy Also done at the time a termination is posted
Refunds due balance	Control of refunds due, payments and balance
Job Placement	Records of placement records and follow-up
Externships	Record of externship placements
License Exam	Record of State Board License Exams Results

Student Mastersheet (3 of 3)

Forms Tracking	Record of forms posted in the system
Letters Tracking	Record of letters tracked in the system
Appointments	Recorded appointments in all modules
Comments	Record of comments recorded in the system
Pending work	Because of the critical importance of this area, this section is included in all section below the student's ID When pending work still open, the reminder will appear on the first page of the mastersheet on red letters just below the student's personal data.
Data Exchange Messages	Records from messages received from the data exchange with USDE contractors
Data Transmissions	Recorded transmissions made to COD
TSM / FAH	Transfer Student Monitoring / Financial Aid History / Data from NSLDS
SSCR/SSCE/SER Sent	Student Status Confirmation Report / Student Status Confirmation Error Student Enrollment Reporting to NSLDS
Data Changes	Recorded Data changes trasmitted to COD
FAFSA Changes	Recorded changes to the FAFSA
Campus Change	Recorded changes of campus within an institution
Transaction Tracking	A record of transactions affecting an individual selected section

Types of Reports

Annual Reports	Located under Administration/Campus Master Set Up/Annual Reports. Includes IPEDS reports (multiple), various Accrediting Agency Reports, State Agency BPPE, Net Price Calculator and Gainful Employment
Management Repots	Data exchange reports include: Data exchange reports pertaining to FAFSA and ISIR processed Pell and direct loan originations SSCR/Enrollment reports from NSLDS

| Reports at each Module | Recruiting
Admissions
Registrar
Financial aid
Fiscal
Placement
Default prevention | Option screens for reports have 3 major sections:

REPORT SELECTION CRITERIA - These options determine what records will be included when the report is generated.

REPORT FORMATTING - These options determine how the report will look when it is generated.

Some reports will have a **SHOW COLUMNS** section under **REPORT FORMATTING.**

BATCHING / SCHEDULING controls whether the report can/will be batched or scheduled. |

Internal structure of each module

Controls	Each module may require specific internal controls that would serve to establish the parameters needed for each transaction available in the system
Transactions	The transactions (TRX) follows procedures required by some governing agency and implements school internal procedures
Reports	Reports: multiple reports in each module, follow requirements established by the institution accrediting agency, the state agency or the federal agency over viewing the institutional participation in Title IV aid programs, as well as the institutional policies and procedures.

Administration

These are tools set and administrated by RGM staff only
Authorized Campus Administrators may view these controls

Campus Master Setup

1001	View School Profile (RGM)
1002	Business Partners Agencies (RGM)
1003	View Campus Profile (RGM)
1004	State Authorizations (RGM)
1005	Accreditations (RGM)
1006	U.S. Title Program Eligibility (RGM)
1007	Non-Title IV Programs (RGM)
1008	Bank Accounts (RGM)
1043	School Regulations (RGM)
1009	Refund Policies (RGM)
1010	Full Time Definitions (RGM)

Programs

1012	Programs of Study - Credit Hour Programs (RGM)
1013	Programs of Study - Clock Hours Programs (RGM)
1014	Term Programs of Study - Non-Degree Programs (RGM)
1015	Term Programs of Study - Degree Granting Programs (RGM)

Program Charges

1016	Standard Charges (RGM)
1017	Program Charges - Non-Term Credit hours (RGM)
1018	Program Charges - Non-Terms Clock Hours (RGM)
1019	Program Charges - Term Programs (RGM)

Program Dates

1020	Start Dates (RGM)
1021	Term dates (RGM)
1044	Open dates for posting on set courses of study (RGM)
1045	Non-Term Payment Periods (RGM)
1022	Non-Term Block dates (RGM)
1023	Date of Program Authorizations (RGM)
1024	Holiday, Vacations or Breaks (RGM)

Administration (page 2)
These are tools set and administrated by RGM staff only
Authorized Campus Administrators may view these controls

Other controls

1025	Forms/Validations (RGM)
1026	Forms Set for file documentation (RGM)
1027	Letters (RGM)
1028	Letter sets (RGM)
1029	Funding sources (RGM)
1030	Owners (RGM)
1031	Cohort Default Rates (RGM)
1032	Annual Flags (RGM)
1033	Reviews (RGM)
1034	Days open (RGM)
1035	School Mastersheet (RGM)
1036	Annual Reports
1060	IPEDS-Outcome Measures Report
1062	IPEDS-Graduation Report
1065	IPEDS- Completions Report
1066	IPEDS-12 Month Enrollment Report
1070	Gainful Employment Disclosure Report
1071	BPPE Fact Sheet
1072	BPPE Annual Report
1073	ABHES Annual Report
1074	NACCAS Annual Report

1037	Scheduled Reports (RGM)
1038	View scheduled Reports (RGM)
1039	Check list of reference controls (RGM)

1040	Job Titles (RGM) Employees
1041	Employees (RGM)
1042	User Profiles (RGM)

System Mail	CPS, CB, and NSLDS mails (RGM)
0096	Data Exchange Reports (RGM)
0097	Pell ED Errors Manual Fix (RGM)
0117	Pending to COD Disbursements
No Response Report	Problem Report (RGM)
0118	Enrollment Reporting/SSCR File List
0119	Enrollment Reporting/Late Certification
0120	Enrollment Reporting Received
0121	ISIR Posting Lists

0122	→	Delinquent Borrowers Report

0123	→	CDR Loan Details Report

0140	→	Enrollment Reporting Sent

Campus change	→	Accessible to users with multi-campus or multi-school password levels

Log OFF Exit from The RGM system	→	**Please!!!** **Do not use web browser exit to terminate the RGM connection. Use the system log off procedure**
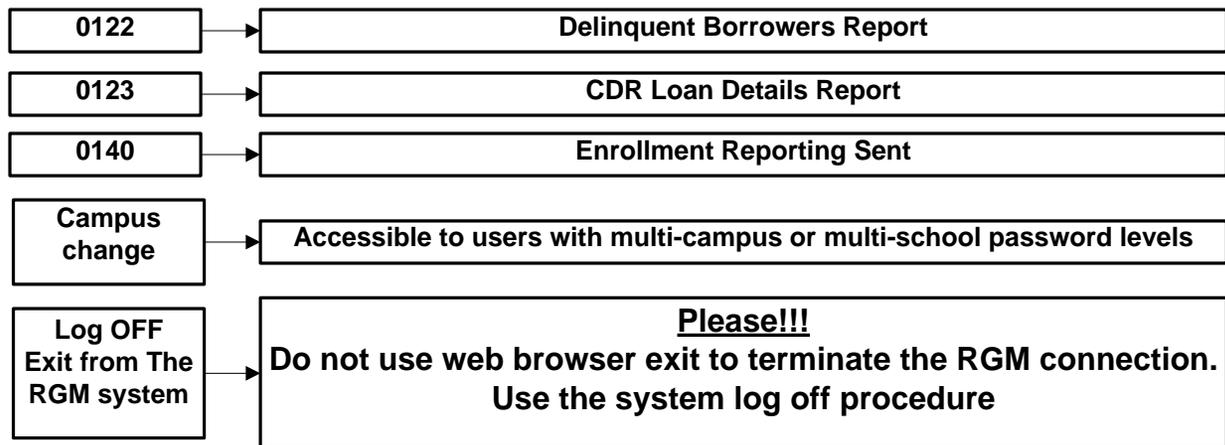
How does the Recruitment Module work?

This module is not a required module, institutions have an option to use it or not. It is necessary for the institution to set up the internal controls if the school intends to use the recruitment module. Those controls would be set as follows:

Controls

2002 Media	**What method of advertising is being used, Radio TV, Newspaper Magazines Fair booths, High School presentations etc**
2003 Media Usage	**From the types of advertising entered in MEDIA, in this section you will record the advertising used. Therefore, multiple entries related to the same media usage will be posted. This control may provide a cost and efficiency analysis**
2004 Kind of inquiry	**Method the prospective student used to contact the school. Walk-In, regular mail, telephone, or electronic inquiry (email, Facebook, or twitter**
2005 Kind of Lead Transactions	**List of actions the assigned recruiter will use to track a prospective student in securing that the lead be converted to an enrollment.**
2006 Counselors	**If the school uses rehabilitation (or similar counselors who refer students to your school), the names of the counselors may be listed here for future Reference.**
2007 Billing Adjusters	**Normally, all insurance claims are handled and paid for (by) billing adjusters from insurance agencies that the school may later need to contact for payment follow up.**

Recording and tracking a lead or prospective student

2008 Lead Card	**As the initial lead is received via a phone call, email, regular mail or in person. Lead Card is created with the prospective student's name an phone number as a minimum amount of data**
2009 Lead Profile	**The information entered in the lead card has been transferred into the lead profile for the user (Recruiter or admissions representative) to complete as much information as available on the prospective student**
DRN	**If the student has received an ISIR at another school, A copy of the ISIR must be requested using the student's DRN**
TRX Transactions	**Any transaction set in the controls are available to the user to follow in the recruiting process. The screen will be modify to accommodate the type of transaction being used until the student is acceped and moved to admissions**
STAFF TASKS	**You can view your Follow-up Tasks created. Appointments are also listed as well as any reassigned leads assigned to the Recruiter or Admissions Rep. Click the lead, task or appointment and update the status as needed.**
2013 Report	**The leads, history report shows all transaction follow by the admissions rates. Percentages per individula are offered**
2018 Quick need Analysis	**Quick Need Analysis by Award Year. Calculating an estimated EFC**

Track your leads, see how your advertising investment is working for your institution

Recruiting Reports

| 2501 Student List Report | → | List of Leads in (Quick Version) or (Featured Version (excel))
 How many prospective student still active but not enrolled?
 How many interviews were conducted this week?
 How many students enroll for your next class? |

| 2502 Lead Transactions | → | Transaction Listing of Leads
 How many students were called?
 What admissions representative had best results
 How many Emails were sent this week? |

| 2503 Transactions by Staff | → | Detailed Transaction listing made by Staff
 Find out actions completed by each of your by staff member
 Determine the media with the best results |

| 2507 Mail Merge | → | Data to be included for Mail Merge
 Select prospective students data based on actions recorded
 Print your labels for your student files |

| 2508 Mailing Labels | → | Data to be included in Mailing Labels
 Select those student that need to be contacted by regular mail |

| 2509 Efficiency Report | → | Recruiter performance is reported in reference to leads assigned
 An efficiency report based on a percentage rate from each staff member
 Appointments, enrollments, starts, withdrawals, graduates and place rates by staff member |

Please remember;
This module will work for you as you determine the institutional needs and controls of funds invested on media and recruiting staff procedures and measurements

Not a required module to reach out for Title IV Financial Aid

Admissions Module 1

It is necessary for the institution to set up some of the controls needed for the admissions module to function in accordance to the Institutional procedures, those controls would be as follows:

Controls

3001 Controls	**Third party funding contract _that may_ require a billing control**
3002 Admissions Requirement	**Minimum level of education required for admission into a program of study**
3003 Admissions criteria	**Regular students would be those with a high school diploma or equivalent, GED, State Certification or home schooled That enrolls to received a Diploma, Certificate or Degree from the course. A Non regular student would be a high school district student that enrolls to obtained high school credits untill they graduate from High School.**
3004 Admissions Test:	**Admissions and ATB exams used by the institutions**
3005 Proctors	**Approved Test Administrators by the Test Publishers**
3006 Groups	**Groups may be assigned based on program and start dates**
3007 Type Flag	**Within the groups, institutions may segregate student into different subgroups in accordance to the school needs**

Working with student data

3008 Student Profile	**If the student was created as a lead and moved from recruiting to admissions, all the data in the recruiting would appears on the student profile If not, this would be the entry point for a new student. The student profile is to be completed as much as possible.**
3009 Student Appointments	**Enter comments on individual students. Restrict the comment to user, area users only or available to all users.**
3010 College Transcript	**If the student is given credit for subjects completed at a prior college, they may be entered here.**
3011 High School Transcript	**High school transcript data may be entered here**
3012 Test Taken	**If the student took an admissions test or an ATB test it may be recorded here**
3013 Non-Term Enrollment	**If the course is a non-term program, the enrollment data is entered here**
3014 Term Enrollment	**If the course is based on terms, enrollment data is entered here**
3015 Weekly schedule	Enter the student weekly schedule for a non-term program
3017 Groups	Assign the student to a group if applicable
3018 Type Flag	Assign a type flag to the student

Admissions 2
Recording the Student Admissions Process

3019 Forms	**Enrollment agreement may be generated from this section**
3020 Letters	**Institutional letters and responses may be tracked in this section**
3021 Student Comments	**Recording student comments**
2018 Quick need analysis	**Quick Need Calculation - Simplified EFC calculation (estimate only)**
3023 Student Mastersheet	**Complete record of student data**
3024 Admissions Reports	**(3501) Student List (Quick Version)** **(3501) Student List (Feature Rich Version)** **(3502) Student Contract definitions** **(3503) Student Daily attendance** **(3504) Contract List** **(3505) PP Contract Addendum** **(3506) Mail Merge Data** **(3507) Mailing Labels for students** **(3508) Mailing Labels for Counselors** **(3551) Student List (registrar)**
3025 Federal Disclosures	**REQUIRED Federal Disclosures – How are our students doing** **Students Right to Know**
3026 State Disclosures	**California BPPE requires the annual disclosure by program** **BPPE Institutional Performance Fact sheet is provided under TRX 1036**
3027 Student References	**Collection of early student reference for purposes of placement and default tracking some years later**
3536 Student Appointments	**Tracking of student appointments with current staff members**

Registrar

Registrar Controls and Postings

4001	Time Clock Rules
4002	Break Time Rules
4003	Standard Weekly Schedule
4004	Classrooms
4005	General Subjects
4006	Subjects in Credit Hour Programs
4007	Subjects in Clock hour Programs
4008	Subjects in Non Degree Programs
4009	Subjects in Degree Programs
4010	Subjects in a Credit Hour Program
4011	Subjects in a Clock Hour Program
4012	Subjects in a Non Degree Program
4013	Subjects in a Degree Program
4014	Classroom Schedule For Non Term Credit Hour Programs
4015	Classroom Schedule For Non Term Clock Hour Programs
4016	Classroom Schedule For Term Programs
4017	Instructor's Subjects
4018	Exams

Registrar Cont….

Registrar Controls and Postings

4019	Assignments
4020	SAP Policies
4021	Grading Groups
4022	Grading Interpretation
4023	Grading Tables
4024	Kinds of Detail Posting
4025	Patrons
4026	Time Clock Devices
4027	Standard Term Schedules

4028	Kinds of Ends
4029	Student Appointments
4030	Student Registrar Forms
4031	Student Letter
4032	Student Weekly Schedule
4033	Student Subject Schedule
4034	Student Class Schedule
4035	Academic Postings by Student
4036	Academic Postings by Course

Registrar Cont....

Registrar Controls and Postings

4037	Academic Postings by Class
4038	Academic Postings by Group
4039	Academic Postings by All Active Students
4040	Student SAP
4041	Student Leaves of Absence
4042	Student returns from Leave of Absence
4043	Student End Data Entry
4044	Students End Batch Posting
4045	Student Diploma Data Entry
4046	Student Diploma by Batch

4047	Student Subject Total
4048	Student Grade Point Average
4049	Student Comments
4050	Student Errors
4051	Student Campus Changes
4052	Student Data Changes
4053	Third Party Time Clock Device
4054	Student Mastersheet
4055	Registrar Reports
4056	Time In Rule
4057	Time Clock Exceptions
4058	Student References

Registrar – Posting Student Data   Cont...
As Needed

4038	**Post By Group**	Use this option to post detail attendance and grades by students in a specific group in accordance to the school procedures.
4039	**Post by All Active Students**	Use this option to post detail attendance and grades to all active students in accordance to the school procedures.
4040	**Student SAP**	This option shows the SAP evaluation periods.
4041	**Student Leaves of Absence**	Use this option to enter a requested and approved Leave of Absence
4042	**Student Leave Returns**	Use this option to enter the return of the Leave of Absence.
4043	**Student End Data Entry**	Use this option to record a termination (graduation, withdrawal, cancellation, no show, etc.)
4044	**Student End Batch Postings**	Use this option to record a multiple termination for term schools
4045	**Student Diploma Data Entry**	Document to release student diplomas
4046	**Student Diploma By Batch**	Document to release student diplomas by a batch (group) of students

Registrar - Controls

This module (just as the Administration), requires a substantial amount of controls and care in setting the controls. Controls are set by SA or RGM only.

4001 Time Clock Rules: If the institution uses the RGM time clock or any other device where time in and out would be downloaded to the RGM system, the rounding rules can be adjusted here.

4002 Break Time Rules: Same as above to automatically account for break and lunch times in the daily postings.

4003 Standard Weekly Schedule: Use this option to create the available daily attendance schedule that you would select in 3015.

4004 Classrooms: Use this option to list the classrooms available to set classrooms schedules

4005 General Subjects: Use this option to list all subjects available to all courses regardless if they are credit hour or clock hour in nature. These subjects would be available to meet the subjects in the course requirement.

4006 Subjects For Credit Hour Courses: Use this option to list all subjects available to credit hour courses. These subjects would be available to meet the subjects in the course requirement.

4007 Subjects For Clock Hour Courses: Use this option to list all subjects available to clock hour courses. These subjects would be available to meet the subjects in the course requirement.

4008 Subjects For Non-Degree Courses: Use this option to list all subjects available to all Non-Degree granting courses regardless if they are credit hour or clock hour in nature. These subjects would be available to meet the subjects in the course requirement.

4009 Subjects For Degree Courses: Use this option to list all subjects available to all Degree granting courses regardless if they are credit hour or clock hour in nature. These subjects would be available to meet the subjects in the course requirement.

4010 Subjects in a Credit Hour Course: If the subjects have been entered in 4005, you may select the subjects required under each of the cre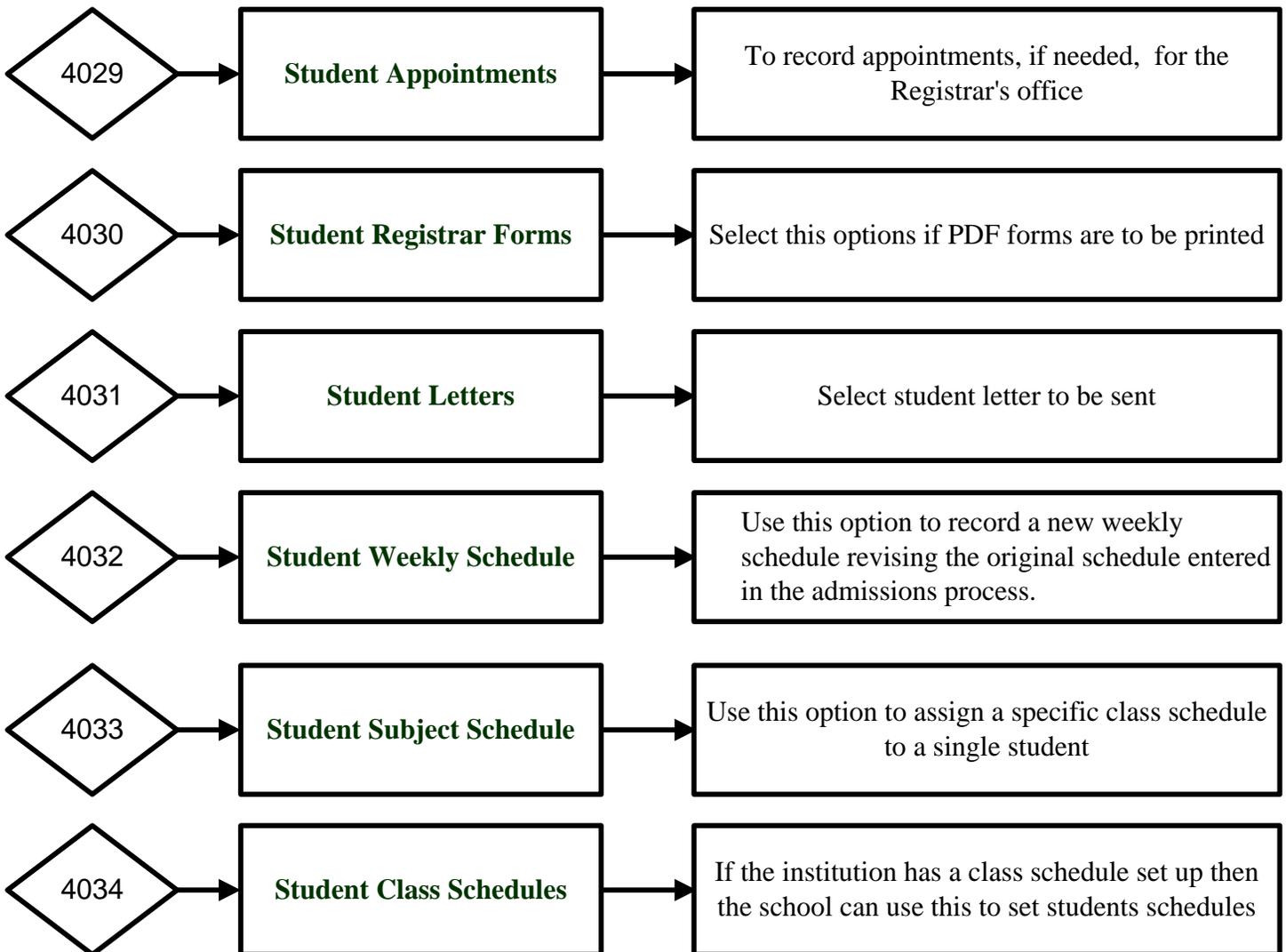dit hour course of study. You may create your own subjects under this option that would be downloaded to the RGM system. The rounding rules can be adjusted here.

4011 Subjects in a Clock Hour Course: If the subjects have been entered in 4006, you may select the subjects required under each of the clock hour course of study or you may create your own subjects under this option.

4012 Subjects in a Non Degree Course: If the subjects have been entered in 4007, you may select the subjects required under each of the non-degree granting courses of study or you may create your own subjects under this option.

4013 For Subjects in Degree Course: If the subjects have been entered in 4008, you may select the subjects required under each of the degree granting courses of study or you may create your own subjects under this option.

4014 Classroom Schedule for Non Term Credit Hour Course: Use this option to set classroom schedules for Non Term credit hour programs for mixed courses

4015 Classroom Schedule for Non Term Clock Hour Course: Use this option to set classroom schedules for non-term clock hour programs for mixed courses

4016 Classroom Schedule for Term courses: Use this option to set classroom schedules for term programs for mixed courses.

Registrar – Controls Cont…

4017 Instructor's Subjects: Use this option to assign subjects to each instructor
4018 Exams: Use this option to enter the exams given under each subject
4019 Assignments: Use this option to enter the assignments given under each subject in each course
4020 SAP Policies: Use this option to select a SAP from global and if needed make modifications to it
4021 Grading Groups: Use this to set grading groups as needed. For example one for non-degree programs and one for degree granting programs
4022 Grading Interpretations: Set the grading interpretations in accordance to the catalog
4023 Grading Tables: Set the grading tables in accordance to catalog
4024 Kinds of Detail Posting: Set the grade and attendance postings in accordance to school procedures
4025 Patrons: Reserved for future use.
4026 Time Clock Devices: Enter the time clock device related to 4001-4002
4027 Standard Term Schedules: To set the classes offered within a term
4028 Kinds Of End: To select from global the kind of terminations use by the school
4056 Time-In Rule: Institutional allowances for late check in
4057 Exception Rule: Dates where school was not in session due to unforeseen circumstances.

Registrar – Posting Student Data
As Needed

| 4029 | **Student Appointments** | To record appointments, if needed, for the Registrar's office |

| 4030 | **Student Registrar Forms** | Select this options if PDF forms are to be printed |

| 4031 | **Student Letters** | Select student letter to be sent |

| 4032 | **Student Weekly Schedule** | Use this option to record a new weekly schedule revising the original schedule entered in the admissions process. |

| 4033 | **Student Subject Schedule** | Use this option to assign a specific class schedule to a single student |

| 4034 | **Student Class Schedules** | If the institution has a class schedule set up then the school can use this to set students schedules |

Academic Postings

| 4035 | **Post By Student** | Use this option to post detail attendance, operations, and grades to a single student in accordance to the school procedures.. |

| 4036 | **Post By Students in a Course** | Use this option to post detail attendance, operations, and grades to students in a course in accordance to the school procedures. |

| 4037 | **Post By Students in a Class** | Use this option to post detail attendance, operations, and grades by students in a class in accordance to the school procedures. |

Registrar – Posting Student Data   Cont...

As Needed

4047	**Student Subject Totals**	Use this option to establish the number of units/hours partially completed on each subject at the point in time where the system is going to be initiated.
4048	**Student Grade Point Average**	Use this option to view calculated SAP
4049	**Student Comments**	Enter comments as needed. Comments may be reserved to the user only, to the persons with access to the admissions module or to all users of the RGM system in the school.
4050	**Student Errors**	View student errors in data exchange
4051	**Student Campus Changes**	Use this option to record the transfer of students from one campus to another campus within the same school organization.
4052	**Student Data Changes**	View data changes on student profiles
4053	**Third Party Device Time clock**	Enter the name of the third party device time clock used to transfer time in and out to the RGM system
4054	**Student Mastersheet**	Report to review entries made to the student record
4055	**Registrar Reports**	Multiple admissions registrar reports to provide an administrative tool to administrators.

Registrar Functions – Posting Attendance & Grades

The RGM has several options to track attendance:

Institutions that need to keep track of the student's IN and OUT to determine daily hours of attendance are welcome to use the RGM Time Clock. This is an integrated part of the web system recording in live time the IN for the first entry, the OUT at a break time, the IN time returning from the first break, the OUT to lunch, the IN returning from lunch, the OUT going to a second break, the IN returning from the second break, an extra IN and OUT for an period of time when the student steps away from the school premises and finally an OUT for the end of the day. The entry to the time clock is done by the student using a key number. A student picture may be shown on the screen to provide a viewable student ID. Changes and overrides to the time clock can only be done by authorized personnel. Rules to control the recorded attendance is located in the registrar controls.

Institutions that utilize a third party servicer tracking attendance may be able synchronize a data exchange with our system, it would depend on the accessibility of both systems.

TRX 4035-39

Institution may post attendance manually using the following transactions;
    4035 to post to a single student,
    4036 to post to students enrolled in a course,
    4037 to post to students attending a class,
    4038 to post to students in a given group and finally,
    4039 to post to students in an active status.

Detailed attendance and subject grades may be posted in accordance to the controls set for the individual programs at a given school. Those controls may be set up as follows:
    Attendance for lecture hours
    Attendance for Lab hours
    Attendance for externship hours
    Attendance for lecture/lab combined hours
    Attendance
    Attendance make-up hours
    Attendance cumulative clock hours
    Attendance cumulative credit hours
    Attendance IN and OUT
    Attendance field trip hours
    Assignments
    Operations done (cosmetology)
    Subject completion
    Exams

Registrar Functions – Posting LOAs and Ends

The RGM system maintains internal controls to calculate R2T4 and Institutional Refund policies upon posting of a student's end or termination. It is critical that before you post a student termination (END) institutional staff check the following;

Registrar:
    Verify start date
    Verify Last day attended (LDA)
    Verify Determination date not to exceed 14 days from LDA or from failure to return from
        an approved LOA
    Verify the accuracy of attendance records and subjects completed and grades

Financial Aid
    Review the student file to confirm that all required documentation is signed and
        complete in the student file
    confirm the accuracy of payments received or that could have been disbursed

Fiscal (Accounting):
    Review the student tuition account to determine that all charges, payments, credits,
        write-offs or waivers are posted.

LOA 4041	▶	Enter the required data to document an approved LOA

LOA Return 4042	▶	Enter the required data to document the student's return from an approved LOA
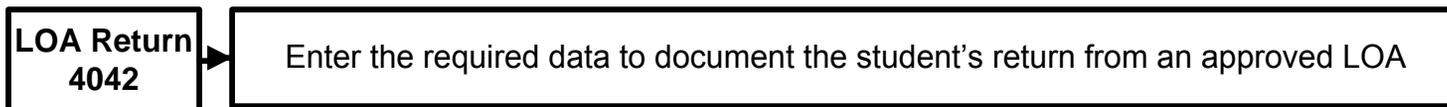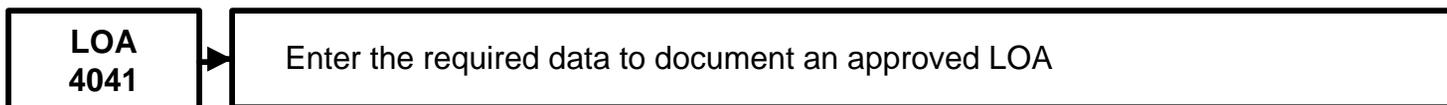
Caution: Posting of a termination will result in a R2T4 and an institutional refund policy will be calculated and recorded in the student record.

ENDs 4043	▶	Enter the required data to terminate the student enrollment

END's Batch 4041	▶	Enter the required data to terminate a group of students
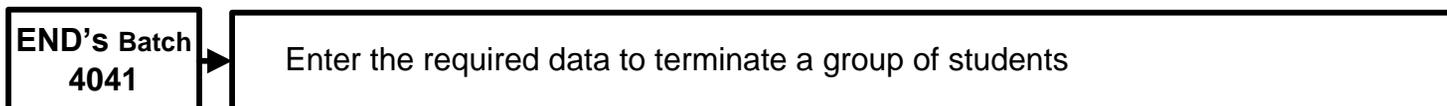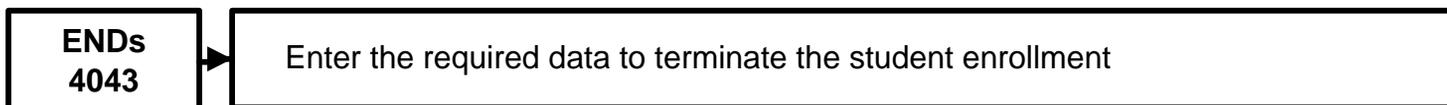
Entering a termination requires that the kind of end be specified as follows:
    No Show or non start
    Cancellation by student or by school
    Withdrawal and the reason for withdrawal
    Transfer within the institution
    Documented transfer to another institution

The system requires information as to who initiated the termination process
    The institution action
    The student action
    The system per internal controls

In order to meet multiple agencies reporting requirements, the system provides the user with 29 different reasons for the termination.

Registrar Reports

Under 4055 there are multiple reports
Select the kind of report to generate from the dropdown menu
Some reports will take some time to generate depending on the criteria selected
The narrower the criteria selected the faster the report will run
Each report provides a selection criteria on the screen
Each report also offers additional report options

TRX 4501 Student List (quick version)
    Report that lists all students of the schools

Trx 4055 report# 4501 Student List (feature rich version)
    Report that lists all students of the schools with the option the Excel format option.

4502 Student List with students with more than 14 days after expected end date
    The report provides a listing of students with more than 14 days after expected end date

Trx 4055 report# 4503 Student Form List
    Report that lists all the forms received by and from students

Trx 4055 report# 4504 Student Leaves
    Report that lists all the Leaves of Absence by student.

Trx 4055 report# 4505 Student Total Absences
    Report that lists all Students with the total Attended Hours and Consecutive Absences.

Trx 4506 Progress Report by Student
    Report that lists all the Total Subject Hours, Exams and Operations (if applicable)
    required and shows the percentage based on amount done by the student.
    Also includes the Satisfactory Academic Progress and Payment Period
    summary of the student

Trx 4055 report# 4507 Progress Report by Student (Subjects Completed)
    Report that lists all the subjects completed by the students in an enrollment or term period. This
    is the unofficial of completed subjects by students.

Trx 4055 report# 4508 Projected 150% Report
    Report that lists all students with the Dates when they are Expected to graduate based as on
    course duration, the end date based as stated in the Enrollment Contract, at 150%
    estimation on the course   duration, and the actual graduation date.

Trx 4055 report# 4509 Academic Transcript By Student
    Report that lists all subjects completed by the students in an enrollment or term period. This is
    the Official Transcript of Records that can be generated. See report options to generate signature
    and other data.

Trx 4055 report# 4510 Student Term List
    Report that lists all term Students of the schools

Trx 4055 report# 4511 Student Term List (showing 14 days after term end)
    Report that lists all term Students of the schools that still active 14 days after the end of the
    term

TRX 4512 Scheduled Hours Calendar
    Report by Students that shows the daily calendar with Scheduled Hours.

TRX 4513 Scheduled Hours VS Actual Hours of Attendance
    Report that lists all Students with their percentage done based on the
    Scheduled and Actual Number. of days/hours attended.
Trx 4055 report# 4514 Student Exams List
    Report that lists all the exams completed by the student
Trx 4055 report# 4516 **Student Daily Attendance report**
    Report that lists the Daily Hours and Cumulative Attendance by Student.
Trx 4055 report# 4517 Student Weekly Attendance Report
    Report that lists the Weekly Hours and Cumulative Attendance by Student
Trx 4055 report# 4518 Student Monthly Attendance Report
    Report that lists the Monthly Hours and Cumulative Attendance by Student
Trx 4055 report# 4**519 Summary of Attendance**
    Report that lists the total the hours attended by students in each class or subject per day.
T**rx 4520 Summary of Attendance (new Format)**
    Report that lists the total hours attended by students in each class or subject per day.
Trx 4055 report# 4522 Zip Code Report
    Provides Zip Codes on selected students
Trx 4055 report# 4523 Emergency Contact Report
    Provides listing of student's emergency contact
Trx 4055 report# 4524 Attendance Sign-In Sheet
    Provides students in a class a list for signatures as they report to class
Trx 4055 report# 4525 Additional Training Report
    Report lists all students with their Expected and Actual End Dates to see the
    Enrollment days they have shortened or extended due to attendance or leaves
Trx 4055 report# 4526 Mailing Labels
    Report that generates a file containing information on students that can be exported
    to MS Word as data source for Mail merge.
Trx 4055 report# 4527 Instructor Grading Sheets
    A paper tool for instructors to record student grades
Trx 4055 report# 4528 Instructor Subject List Report
    List subjects taught by a given instructor
T**rx 4529 Monthly Hours and attendance report**
    This report shows the Total Hours at the start of a month, for the month and total to date.
Trx 4055 report# 4530 Honor Roll Reports
    Report provides a list of students placed in the Honor List
Trx 4531 Summary of time clock attendance
    A summary of the recorded in and outs
Trx 4055 report# 4532 Transcript for Clock Hour schools
    Report that lists all the Total Subject Hours, Exams and Operations (if applicable)
    required and shows the percentage based on amount done by the student.
    This is the Official Transcript of Records that can be generated
Trx 4534 Class Roster:
    A roster of active students during a specified week, group, schedule or course
Trx 4535 Missing Attendance Posting
    List of students who have not had attendance posting for 14 days
Trx 4536 Student Appointments Report
    Report that provides a schedule of appointments between staff and students

Financial Aid

Financial Aid Controls and Postings

5001 — Aid Award Rules (RGM) This control is set-up by RGM in accordance to the school packaging procedures to select recipients for each Title IV program

5002 — Pell Cost of Attendance (RGM) This is an internal control set by RGM per Federal regulations to manage the cost in the Pell grant program

5003 — Term Budgets (RGM) This control is set by RGM in accordance to the term cost of attendance source used by the institution. It is a control that is modified each year by RGM

5004 — Child Care Budgets (RGM) This control is set by RGM using the institution budgets for child care allowances. It is not a required item therefore leaving it blank would not affect the operation of the system.

5005 — Campus Lender Rates (RGM) Individual banks that participate on the FFELP charge a different interest rate. Those rates for historical reasons, must be retained by the system.

5006 — Student Appointments This serves the purpose of recording and tracking appointments made for the financial aid office.

5007 — Student Financial Aid Forms is used to track multiple financial aid forms applicable to the documentation of an individual student file

5008 — Student Prior SARs This posting records the history of prior ISIRS received on a given student

5009 — Other Pell received at prior school This posting provides the tools for the USDE transfer monitoring process. This posting is done directly from the information on the NSLDS page of the ISIR

Financial Aid Cont.

5010 → Student Term Budgets Information In conjunction with the school these controls are setup to determine cost of attendance in term programs

5011 → Parent Income tax information for IRS reporting on 1098 T forms due in January of each year

5012 → Financial Aid Packaging is the area where the financial aid officer, upon the evaluation of the student's application, awards of types of aid are determined and offered to the student.

5013 → Student Budgets serve to set the student's cost of attendance and use professional judgment to make changes to elements on the COA

5014 → Student Loan Periods set a critical part in the loan process. It is critical that the loan periods are established up front based on the enrollment status securing that a subsequent loan period is processed at the appropriate time

5015 → Direct Loan Applications contains the history of all Direct loan applications for the individual student at this school

5016 → FFELP Applications it contains the history of all FFELP loan applications for the individual student at this school

5017 → FFELP Checks retains the history of each disbursement posted by the FAO in relationship to each of the loan FFELP applications

5018 → FFELP Follow-Ups it records each action following the FFELP transactions as posted by the FAO

5019 → FFELP EFT Payments This option records the EFT payments made by the bank lender in behalf of a group of students

Financial Aid Cont.

5020	→	Direct Loan PLUS Borrower
5021	→	Direct Loan Promissory Note
5024	→	Direct Loan Promissory Note Manifest
5027	→	ISIR Corrections-DRN If an ISIR exists for the award year, you will not be able to add a DRN
5028	→	Pell Data Request (RGM)
5029	→	Check Validation Control (RGM)
5030	→	**Check Processing Log**
5031	→	Student Masterheet
5032	→	Student Comments

| 5033 | → | ISIR Holds/Clears |
| 5034 | → | Student References |

5034 →

Financial Aid Reports
5501 Payment Summary
5503 Pell Summary
5504 Pell Information
5505 IPS Summary
5506 Aid App Summary
5507 DL Loan Summary
5508 FFELP Summary
5509 Zone Alternative
5510 Pending Work
5511 Pell PP Summary
5512 FSEOG/FPELL/EFC
5513 Students in Reimburse
5514 Detail Reimbursement
5515 Pell Award Table
5516 Loan Student List
5517 Committed Funds

FAFSA →

Entering and sending new FAFSA, ISIR corrections for
(5115) FAFSA 2014-2015
(5116) FAFSA 2015-2016
(5117) FAFSA 2016-2017
(5118) FAFSA 2017-2018

ISIR →

Print ISIR for
(5213) ISIR 2012-2013
(5214) ISIR 2013-2014
(5215) ISIR 2014-2015
(5216) ISIR 2015-2016
(5217) ISIR 2016-2017
(5218) ISIR 2017-2018

Financial Aid Functions FAFSA and ISIR

With the information created in the admissions section, all the fields with data required on the FAFSA will be copied by the system. The FAO needs to continue filling in the rest of the fields applicable on the FAFSA. Go to section 5114 for the 13-14, 5115 for the 14-15, 5116 for the 15-16, 5117 for 16-17, 5118 for 17-18 or 5119 for 18-19

FAFSA

In the RGM system we use the FAFSA section to enter a new FAFSA or to make corrections to an ISIR received.

A new FAFSA needs to be completed as applicable for a dependent student using the student and parent information. For an independent student the data to be used would be that of the student and spouse if it applies.

It is extremely important to remember that using the RGM system to send a new FAFSA, the original form MUST remain in the student file with original applicable signatures.

It is also critical that upon entering the FAFSA or when making the corrections to an ISIR, that the flag is set on the last screen to SEND. A response to a new FAFSA may be expected within 72 hours, a corrected ISIR may be expected with in 48 hours. Please contact our office if the responses are not received within those time frames.

FAFSAS completed in the Web, will also be received by RGM as the destination point for the institution providing the institution Pell ID on the FAFSA on the Web. For these students, the institution would not have to retain a signed copy of the FAFSA in the student file.

Transfer students providing the DRN number from the prior school ISIR could request and receive a copy of that ISIR by using TRX 5027.

Please remember any time the ISIR is being corrected, the ISIR signature page needs to be signed as applicable. All changes must be thoroughly documented in your file.

Professional Judgment calls on 2017-2018 or after can only be done after the initial valid ISIR is received showing the actual information based on the presiding calendar year.

ISIR

To print an ISIR generated through the RGM system or on the Web please use one of the following options
>   **5214 ISIR 2013-2014   5217 ISIR 2016 2017**
>   **5215 ISIR 2014 2015   5218 ISIR 2017 2018**
>   **5216 ISIR 2015 2016   5219 ISIR 2018 2019**

A valid ISIR is one that shows an EFC on the first page (upper right hand side)

An asterisk (*) next to the EFC shows that the students has been selected for VERIFICATION. Please complete the dependent or independent verification form as applicable.

A capital "C" next to the EFC shows that the student has been flagged by one of the agencies and the issue in question must be cleared by the FAO.

Please make sure you review all comments on page 1 of each ISIR received for each student.

Financial Aid Functions – Awarding Aid

Once a valid ISIR is received by the institution for the student, the ISIR must go through the verification process and/or the clearance of any "C" comments listed on page one of the ISIR. The data entered under the admissions module provides the course information, enrollment status and institutional charges. With this information the system uses the California Student Aid Commission annual published budget to calculate the student projected cost of attendance (room, board, transportation and personal cost) for the schools operating in California and its projection into other states. If the institution FAO has a state source for its budgets, that cost may be provided to RGM to replace the budget in place.

Awarding Aid

Once the ISIR is Verified (if selected), and all "C" Comments (if any) have been cleared, as well as any discrepancies in the student data that were found by the FAO are resolved, the FAO (using transaction No.5012), is able to make financial aid awards from the aid programs available at the institution.

Student Cost:
A cost of attendance (COA) is calculated from a monthly amount multiplied times the number of months in an academic year or months in the course whichever is lower

Aid Awards and Need:
The amount of the awards is the amount representative of the total award for the academic year or enrollment period whichever is less. Disbursements from all Title IV funds (except FWS) are scheduled to be made in accordance to the number of payment periods in the academic year or period of enrollment.

> **Pell** awards are calculated by the system
> **SEOG**, **Perkins** and **FWS** awards are made by the FAO in accordance to institutional packaging policies.
> **Direct Subsidized, Unsubsidized** and **PLUS** loans are packaged in accordance to the individual student need
> > (please be aware to select the correct award year for Title IV program awards)

Award Letter:
Upon completion of the aid awarding process, the FAO may print an award letter from the system. Using the Positive Method of Notification, the award letter must be signed by the student. Using the Passive Method you may not require a signature on the award letter, however, the institution must have a method that can be confirmed that the student received the required notice.

Student Record

The student master sheet shows the student data related to admissions (course, Start date, enrollment status, and weekly schedule).
Data related to financial aid such as; FAFSAs, ISIRs, budgets (school charges and cost of living), payment period data, aid awards, tuition account, Pell originations and disbursements data Direct Loan originations, disbursement and, disbursement status.

Financial Aid Functions – Disbursing Aid

Once the aid awarding process is complete, the disbursement pertaining to each program would be listed in the Financial Aid module – Process Payable Checks -Check Process TRX 5030.

TRX 5030 opens to the user the following defaulted fields:

All Students	This can be changed to select a single student
Process date	This defaults to current date
Award Year	This defaults to current award year

Run date time	Intentionally left blank
List of payable	
and problem checks	Date of last run
No. of payable checks	Checks ready to be approved by FAO
No, of problem checks	Check scheduled as of today but with problems
Future date checks	Checks scheduled to be disbursed at a later date

Selection:
View paid checks
View payable checks   A listing of disbursements with an scheduled disbursement date prior to the current date ready to be approved for payment
View problem checks   A listing of disbursements with an scheduled disbursement date prior to the current but with problems issues that need to be resolved before they can be paid
View future problem checks   List of disbursements scheduled to be paid with a future date

Data in the disbursement listing:
> Campus Number
> Name
> ISIR Last name
> Amount
> Award year
> Payment Period (PP)
> Use   (to school for school credit or to student for living expenses)
> Original scheduled date of disbursement
> Remarks providing any remarks that are holding the disbursement on the problem checks, Those problems may be; No ISIR, Verification required, C comment still unresolved (SSA, DHS, SS, NSLDS), no attendance, posted, credit hours not posted, instructional weeks not reached and others. What ever reasons are listed, the student file must retain clear documentation of the resolution of each item.

Select the disbursement you want to issue. Once the selection is made, click on the field
> FORWARD TO ACCOUNTING

The financial aid approval of the disbursement is done, the fiscal office is now able to print those disbursements from the system.

Financial Aid – Trx 5034 Reports

5505	**IPS Summary**	Pell Documents sent to/accepted by ED
5506	**Aid Applications Summary**	Displays the Transmission Status of FAFSA Applications, ISIR corrections and DRN entries submitted through RGMSMS for the specified Award Year. When ISIRs are received the dates, ISIR TRX numbers and ISIR reject codes are displayed
5507	**DL Loan Summary**	Direct Loan Summary displays all loans and disbursements
5508	**FFELP Summary**	Displays the FFELP disbursement details for each student in the specified Award Year including the payment status, amounts, check numbers, dates and amounts returned. Paid, Unpaid and Grand Totals broken down by FFELP Loan types are also displayed
5509	**Zone Alternative**	List of each Title IV payment printed from RGMSMS during the posting date range entered. Broken down by student, pay period date, payment date, and amounts. Also displays totals by fund
5510	**Pending Work**	Lists items still pending in the effort to complete the Financial Aid packaging of a student, Reviewing and clearing the issues on this report every day is a must for every Financial Aid Office
5511	**Pell PP Summary**	Displays all details pertaining to a students Pell Award(s) broken down by Pay Periods (PP). Report includes: Pell calculation, Pell amount, payment status, refund details, PP start and end dates, PP required hours/units, ISIR TRX # and ED approval.
5513	**Students in Reimbursement**	List of Student Reimbursements
5514	**Detail Reimbursement**	Detailed Reimbursement Report

Financial aid – Reports cont.

5516	**Loan Student List**	**List of Students with loans during a date range**
5517	**Committed Funds**	**Record of funds committed and uncommited balances**
5519	**FA SAP Report**	**Satisfactory Academic Progress Reports for students with Financial Aid**
5520	**SAP Notifications**	**Notification Letters for students who are Unsatisfactory for SAP**
5522	**Award Letters**	**List of Students that have not had FA Award Letters printed**

End of 5034 Reports

More Financial Aid Reports

5038	**Successful Student Persona Report**	**Graduates who completed during the specified date range: Student Name, Address, Phone, Email, ISIR Info (AY, dependency and marital status, household size, income, child support) GPA, End Date, Other enrollment details, Recruitment Media Used, Campus, Program, Prior Education, Age and Placement details (employer, address, title and pay).**
5039	**Unsolicited ISIRs**	**Lists all ISIRs a school got in an AY / date range that do NOT belong to existing students or leads in the system. Some schools use this to generate leads, since getting an ISIR means the student listed the school while doing the FAFSA or FOTW.**

Financial aid – Reports TRX 5034

5501 → **Payment Summary** → Listing of Students and their Payment details by Type: Title IV, Non Title IV, Title IV Fees, Cash and Other. The report may also be based on Outstanding Balances Only, Negative Balances Only or Totals Only. Report Options include: Student Key, SS#, Show list of students (payment details), Show Totals by Program Fund, Show Totals By student, Show Income Totals, Show Totals by Course, Show student selection for audit. Students selected for verification are also flagged by an *.

90/10 calculations per student, per aid program and per course of study is included in the report

5503 → **Pell Summary** → Listing of Individual Student Pell Payment Status broken down by month

5504 → **Verification & Flag List** → Generates those students whose ISIR was selected for Verification and several other flags. You may generate only those students with outstanding verification. The Date and person verifying the ISIR is displayed along with other Verification & Tracking flag details.

5512 → **FSEOG/ FPELL/EFC** → Lists Dates of FAFSA and ISIR, Dependency Status, EFC and Disbursements received for SEOG, Pell and FWS.

5515 → **Pell Award Table** → Full time Pell Annual Payment schedule

5521 → **Disb. Notifications** → List of students who had Title IV Disbursements during a date range

5523 → **Loan Limit VS Loan Award** → Title IV Student Limits for against their actual Awards

5524 → **TSM/FAH Report** → Tracks data from the NSLDS Transfer Student Monitoring process. FAH is Financial Aid History. The TSM Inform Sent option lists records we sent to NSLDS to request TSM or FAH. The TSM Inform Errors Received option lists errors from NSLDS in response to TSM or FAH requests. The TSM Alerts and FAH Received option shows the detailed data received. TSM Alerts and FAH have the same layouts, but the hold on checks for FAH times out while the hold from a TSM Alert requires a posting to clear

5525 → **Gainful Employment Reproting** → Data that must be sent to USDE for Gainful Employment Programs

5526	**GE Debt to Earnings**	Report required by DOE for students enrolled in a program considered Gainful Employment
5527	**COD Direct Loan Rebuild**	A COD DIRECT LOAN REBUILD file RGM receives to reconstruct a full year's DL data for a school new to RGM. This report compares the data from the file to the data in the RGM system.
5528	**MRR Report**	This lists all MULTIPLE REPORTING RECORDS a school got in an AY / date range. Schools that keep good control can use MRR data to contact other schools before a POP situation develops.
5536	**Student Appointments**	Report showing a schedule or history of student appointments with staff
5540	**Direct Loan Disbursement Summary**	A list of Disbursements for an AY, broken down by student, amounts, status, and dates. Report can be filtered by disbursements and/or refunds with or without errors
5542	**Deatiled Reimbursement Report**	This report provides the reimbursement details required by ED for those schools under Heightened Cash Monitoring.
5551	**Student List**	A very dynamic report available in each department of RGM. This allows you to build a listing of students from multiple criteria of statuses, data ranges, groups, etc. as well as many options to be shown on the report.

Fiscal

Student Fiscal Transactions

6002	Student Appointments
6003	Student Payment Periods
6004	Student Charges
6005	Check Orders
6006	Print Payable Checks
6007	Check Clearing

6010	Write Offs
6011	Tuition Waivers
6012	Cash Pay Schedules
6013	Cash Payments
6014	School Paid to Students
6015	Aid Checks
6016	Refund Dues
6017	Refund Interests Paid
6018	Refunds Paid
6019	Post Withdrawal Disbursements

Student R2T4/Refund Calculatiion

6008	Return of Title IV
6009	Refund Calculations
6031	Print Refund Page

Fiscal Transactions Cont…

6020	Collection Costs
6021	Bounced Checks
6022	Overpayments
6023	Authorization Letters (RGM)
6024	Bluebook Transactions (RGM)
6025	Student Mastersheet
6026	Student Comments
6032	Student References
6033	Student Fiscal Forms

Fiscal Functions – Printing checks/vouchers – TRX 6006

Once the financial aid office has approved individual Title IV disbursements, those approvals will be listed under TRX 6006.

6006

All checks listed under this transaction MUST be printed.

Next, click on **GO TO CHECK PRINTING**

Next window will ask the user to confirm the check number of voucher number where the next entry will be printed on.

WARNING
It is critical that when printing checks and vouchers numerically pre-printed that the number entered in this window matches the actual number on the pre-printed document. On checks, that number will be listed on your bank statement. An audit trail will be lost if the numbers do not match. On vouchers, funds will be requested using those numbers in the internal controls, once again the audit trail would be lost if numbers do not match.

Once the number is entered, click on **GO TO PROCESS CHECKS**, the screen will refresh to show the user again the checks to be printed. Check the box on the upper left corner of the listing to print them all or check individual students for selected students.

Once the selection is completed, click on check preview. The checks to be printed will appear on the screen. Before you click on print, please make sure that the printer is online and a good base setting when using Mozilla Firefox may be to set the Top, Left and Right margins to 0.3 and Bottom margin to 0.0.Ensure your checks OR vouchers are placed on the printer in the right direction and correct numerical order.

Please click exit to end the process

Fiscal Reports

Blue Book Reports

6027	→	Blue Book Reports	⎤
5604	→	Uncommitted Funds	A group of reports detailing the Financial Aid Ledgers per the BLUE BOOK NACUBO accounting guidelines for each Title IV Aid Programs. Mostly for the use of RGM
5610	→	G5 Cash Report	⎦

Trx 6028 Fiscal Reports

6501	→	Cash Flow	A comparison between the school's expected cash flow and the actual cash flow broken down per student over a twelve month period. Report Totals also include scheduled and paid funds broken down by Fund Type.
5604	→	Refunds Due	Listing of Refunds due per student for PELL, PERKINS, SEOG, FWS, SUB, UNSUB, PLUS and OTHERS. Report can be generated by either AY or LDA range.
6506	→	Refunds and Interest	List of Individuals with Late Refunds and Interest due to USDE. Report specifies the number of days and months late as well as interest amount charged
6507	→	Cash Payments	List of Scheduled Cash Payments, Actual Cash Payments and Payments the School Paid to the Student broken down by individual students. Payments may be recorded as payment toward a payment scheduled or other as just cash payments
6508	→	Scheduled Checks and Actual Paid Checks	List of Scheduled Student Tuition Payments VS Actual Payments Paid. Includes any type of awards for title or non title IV aid that system has as "Funds to be paid"
6509	→	Charges and Payments	Ledger by student showing their Credits and debits with amounts, dates and aid type
6511	→	Student Over-payments	Lists students with overpayments and the amount of the overpayment
6513	→	CA STRF Report	Tuition Recovery Fee Report

Fiscal Reports – Cont….

6514	List of Write-offs	Listing of Students with Write Offs posted. Includes Write Off amounts, Kind of Write Off and user posting it
6516	Title IV Credit Balance	Listing of Students with a Title IV Credit Balance on their tuition account.
6515	Student List	A very dynamic report available in each department of RGM. This allows you to build a listing of students from multiple criteria of statuses, data ranges, groups, etc. as well as many options to be shown on the report.

TRX 6029 Billing Reports

6701	Billing Statements	Student Billing Statements displaying Scheduled and Past Due Cash Payments. Student Ledgers are also shown. Billing Statement can be generated based on Individual Students, Specific Students, Enrollment Status, Students with Past Due Amounts, Students with Balances, etc.
6702	Ledger Card	Report generating Student Ledger Cards including Itemized Charges and Payments. Scheduled Payments and the Scheduled Balance may also be viewed as an option
6703	Balances	Accounts Receivable Report listing past and current students, their status, SS#, Charges, Credits, and Balance. Report Grand Totals includes a student average balance
6704	View Student Account	Generates Student Ledger Cards using following criteria: Student Key, Groups, Start or Enrollment Period dates.
6705	List of Receipts	Lists payments received during the report period that were posted in TRX 6013 - Cash Payments. Includes student name, payment date and amount, check and receipt number as well as staff member receiving payment. A Grand Total of Payment Amounts is also provided
6706	Aging Report	Shows the outstanding receivable(s) for a given segment and for each student with an Outstanding Balance. Those amounts are broken down into aging buckets (Current due, 30, 60, 90, 120 & due over 120) to allow schools to see how many days past due the receivables are and determine whether a receivable should be pursued or written off. Each brocket will show the total due for that time period and the overall total due is also shown on this report

Fiscal Reports

6502 / 6617	FISAP Report	Annual Report to report annual expenditures for ending June 30th and for requesting funds for the following July 1, for Perkins, SEOG and FWS Programs
6503	Refunds Due	Listing of Refunds Due per student for PELL, PERKINS, SEOG, FWS, SUB, UNSUB, PLUS and OTHERS. Report can be generated by either AY or LDA range
6505	Unpaid Tuition List	List of Terminated (Graduated and Dropped) Students with outstanding tuition balance
6509	Charges & Payments	List of students with Charges and Payments. Includes Charges, Payments, Scheduled Payments, Actual Balance and Scheduled Balance. Payments are broken down by Fund Type, Past Due and Future Amounts.
6510	Students for 1098T	A Listing of students eligible for 1098-T forms. 1098-T forms are required for Tax Return preparations. Eligible educational institutions send this form to each student they enroll and for whom a reportable transaction is made. Insurers send this form to each individual to whom they made reimbursements or refunds of qualified tuition and related expenses
6512	Accts Receivable	A calculation of the student's accounts to determine amount earned and amount unearned
6516	Title IV Credit Balance	The Title IV Credit Balance Report provides a list of Title IV students who have a credit balance on their tuition account. The credit balance resulted specifically from Title IV credits posted. Schools must make sure Title IV credit balances are removed after a specific amount of time and/or past crossover Award Years.
6517	Cash Payment Delinquency	The Cash Payment Delinquency Report provides a listing of students who have a Cash Pay Schedule set-up under Trx 6012- Student Cash Pay Schedules, and are delinquent on Cash Payments. The past due amounts are broken down into aging buckets (Balance, 1-30, 31-60, 61-90, over 90 days). Cash Payments are posted as credits to students' tuition accounts by recording payment under Trx 6013- Student Cash Payments. See screen shots below for sample student, Screen Shot 1 below displays a student Cash Pay Schedule created under Trx 6012. Screen shot 2 below displays actual Cash Payments made by the student under Trx 6013. Screen Shot above displays the student on actual delinquency report.
6518	Pell SAS	Pell School Account Statement (SAS)-Report received from COD monthly and used for Pell reconciliation

Fiscal Reports Cont.

6519	DL SAS	Direct Loan School Account Statement (DL-SAS)-Report received from COD monthly and used for Direct Loan Reconciliation
6520	Pell Reconciliation	List of Students awarded Pell by AY. Compares their originated, accepted, scheduled and actual amounts including YTD totals for RGM to reconcile Pell awards.
6530	Hours in Interval	Shows the completed/earned hours of students, and breaks down the tuition on the hourly level to calculate the amount of tuition earned during the specified interval.
6536	Student Appts.	Report showing a schedule or history of student appointments with staff
6551	Student List	A very dynamic report available in each department of RGM. This allows you to build a listing of students from multiple criteria of statuses, data ranges, groups, etc. as well as many options to be shown on the report.

Placement

Placement controls

7003	Placement Transactions	Customize your own Types of Placement Transactions that shall be used in Trx 7011 Student Placement Transactions module to record the efforts/actions taken when placing students in jobs or tracking state licensing efforts.
7004	Placement Waivers	Waivers that shall be used in Trx 7014 Student Job Placement module. These are the only acceptable reasons for waiving a student's placement obligation. Placement waivers accepted and/or specified by the institution's Accrediting or State Agency are the only types entered. Placement Waivers are part of placement reports (IPEDS, Accrediting Agency, etc.) but do not have an adverse effect on the institution's placement rate.
7005	Employers	Employers used in Trx 7012 Student Externship, Trx 7014 Student Job Placement and Trx 7015 Student Referral modules. Names of prospective employers hiring graduates in their field of study, as well as employers participating in the student externship program. Also enter Job openings available from these employers, and keep track of students referred to these Job Openings.
7006	Occupational Classification	Occupational Classifications and Titles applicable to the institution's programs that shall be used in Student Job Placement module Trx 7014.

Placement TRX

7008	Student Appointments	Tracks the date, time, duration, employee and status of appointments between the employee and the student.
7009	Student Placement Forms	Forms can be specified here so that schools can track them and the system can check these forms to facilitate the validation of internal processes such as check processing and package calculation.
7010	Student Placement Lett	Track Placement Letters printed and posted to the Student
7011	Student Placement Tran...	Records the efforts or actions taken when placing students. Types of Placement Transactions are first created in the Placement Transactions Control Trx 7003.
7012	Student Externships	Tracks students placed at externship sites. If the student is later hired for employment by the externship site, the module conveniently allows the externship details to be copied and posted to Student Job Placement module.
7013	Student License Exams	Track Students taking State and/or Licensing Exams.

Placement Cont.

7014	Student Job Placement	Tracks the Job Placement status of Graduates.
7015	Student Referrals	Enables you to refer students to Job Openings and track the interviewing and hiring status of that particular referral. When a student is hired through a referral, it also posts as a Student Placement under Trx 7014. Employers must first be entered under Trx 7005 Employers.
7016	Student References	Stores Student Reference information. Typically a list of Student References (i.e. Relatives, Friends, etc.) is collected in the Admissions Process and/or Exit Interviews. Schools refer to Student References for various reasons such as emergency numbers and locating the student for Default Prevention once the student becomes inactive.
7017	Student Mastersheet	A compilation of most data entered in RGMSMS for the selected student. You may select to view or print only selected data or ALL data available
7018	Student Comments	Create, update, delete, and browse through Student Placement Comments posted by the school user. Comments are posted for individual students.
7551	Student List Report	A very dynamic report available in each department of RGM. This allows you to build a listing of students from multiple criteria of statuses, data ranges, groups, etc. as well as many options to be shown on the report.
7536	Student Appts.	Report showing a schedule or history of student appointments with staff

Placement Reports

7019

7501 Placement Transactions: Build a report based off placement transactions posted
7501 Placement Transactions Version 2: Build a report based off placement transactions posted
7502 Unplaced Students: Displays anyone who has yet to be posted as employed in their field of study.
7503 Placement Follow up: Displays Graduates who were employed in their field of study within a specified timeframe from graduation.
7504 Possible Graduate: Displays students who are expected to graduate wihtin the timeframe entered
7505 Student Forms: Listing of students who have forms posted
7506 Mail Merge Data: under construction
7507 License Exam List: Displays details such as anyone who has or has not taken their Licensing Exam as well as the Exam Dates and Exam Results.
7508 Student Externship List: Displays Externship details such as Externship Site Name, Start and End Date of Externship and Externship Status.
7509 Employers List: Allows you to generate a list of Employers entered under Trx 7005 that are available for assigning Externships, Job Referrals or Job Placements.
7511 Graduate Placement Report: Displays Graduate employment and state exam details.

Default Prevention

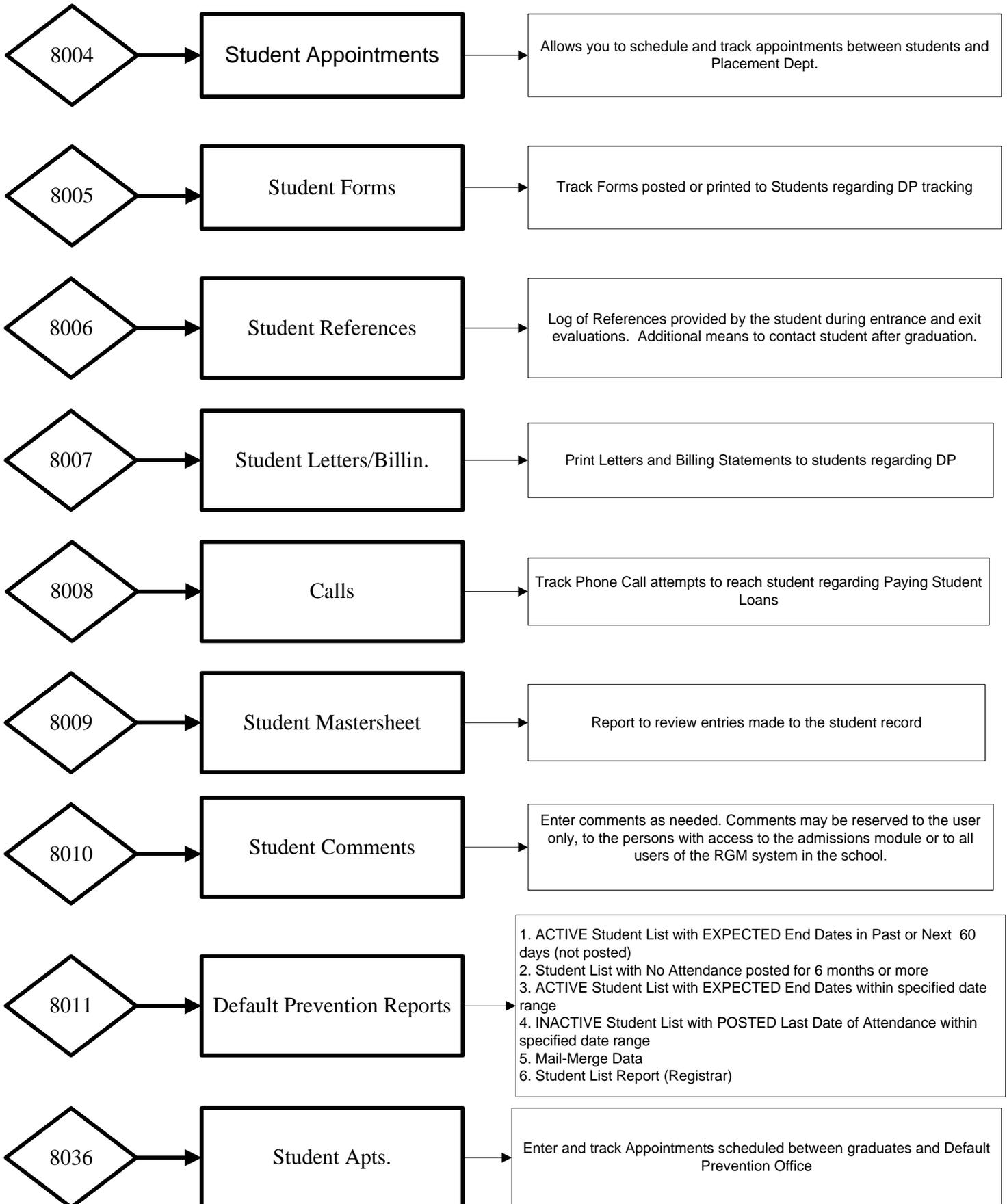|		
8004	Student Appointments	Allows you to schedule and track appointments between students and Placement Dept.
8005	Student Forms	Track Forms posted or printed to Students regarding DP tracking
8006	Student References	Log of References provided by the student during entrance and exit evaluations. Additional means to contact student after graduation.
8007	Student Letters/Billin.	Print Letters and Billing Statements to students regarding DP
8008	Calls	Track Phone Call attempts to reach student regarding Paying Student Loans
8009	Student Mastersheet	Report to review entries made to the student record
8010	Student Comments	Enter comments as needed. Comments may be reserved to the user only, to the persons with access to the admissions module or to all users of the RGM system in the school.
8011	Default Prevention Reports	1. ACTIVE Student List with EXPECTED End Dates in Past or Next 60 days (not posted) 2. Student List with No Attendance posted for 6 months or more 3. ACTIVE Student List with EXPECTED End Dates within specified date range 4. INACTIVE Student List with POSTED Last Date of Attendance within specified date range 5. Mail-Merge Data 6. Student List Report (Registrar)
8036	Student Apts.	Enter and track Appointments scheduled between graduates and Default Prevention Office

THE END

Please provide your comments suggestions and questions to

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Thank you