Maintain Financial Aid Term

PATH: Financial Aid > Financial Aid Term > Maintain Student FA Term

Financial Aid Term pages display the most recent information about a student for a particular term. For example a student’s Career, Program, and Plan (major), eligibility to enroll (no blocks/negative service indicators) and other information (GPA, Study Agreement, Withdrawal Information, etc.) This data determines Budgeting and Packaging. Usually you will only need to view these pages, and this information will be kept updated through a nightly update, but occasionally you may need to prompt the system to look for an update that has not passed over yet.

Start by looking up a student for a particular aid year. Searching by ID is the recommended method.
**FA Term tab**

At the top of the page is displayed the name and ID # of the student. The system also shows which term is being viewed. In this case we are looking at Spring term.

**Effective Date:** We can see when this record was last updated.

**Career:** Students will be associated with at least one Career: UGRD, GRAD, LAW, UCBX (Extension). A student’s career impacts their COA, as well as financial aid eligibility and distribution.

**Program:** College or program type (e.g., Undergrad Engineering; Law Academic, Undergrad L&S).

**Acad Plan:** a.k.a. Major. (e.g., Cognitive Science, French). Plans can also define minors (subplans) or additional majors.

**Aid Year:** Aid Year (e.g. 2015–2016)

**Eligible to Enroll:** If checked, there are no blocks (also known as **Negative Service Indicators**).

**Navigating History:** To see historical information, click the **Include History** button at the bottom of the page and either use the arrow buttons (as well as the **First/Last** links), or click **View All**

The top set of arrows in the Term Information field will toggle between Fall and Spring term.

The second set of arrows in the **Student Data** section will display historical records within the semester you have chosen above.
**Acad Level tab**

Similar information is repeated on the **Academic Level** page, **Name, ID, Semester, Effective Date** of this data, as well as **Career, Program**, and **Plan** information. Other important fields are **Load** (**Full-time** or **Part-time**), as well as **Academic level** (e.g., Freshman).

**Statistics tab**

This tab shows statistics for the student. It will also display GPA. In a real record, the **Session Details** box on the right would contain helpful information, such as the current number of units.
Financial Aid Info tab

This page also repeats key information at the top of the page (Name, ID, Term, Effective Date, Career, Program, Plan).

**NOTE:** The Budget Required field in the bottom, right corner can be used to recalculate a budget manually if something is changed on any of these pages.

Records/Term tab

The Study Agreement Field will display information if the student has a study agreement (such as EAP).
Withdrawal tab

If the student withdraws, the details will be displayed on this page.

Information on these pages is updated by a nightly batch process, but if you know changes were made the same day that aren't showing yet (e.g., the student changed their major), you can manually run the update process by clicking the Build button. The information will then update and save.

NOTE: There is no need to manually click Save unless you have overridden data on this page.

Support:

For questions or assistance, please contact Campus Shared Services IT:

• Call 510-664-9000 (press option 1, then option 2 to reach SIS support)
• Email: itcsshelp@berkeley.edu
• Submit a ticket: https://shared-services-help.berkeley.edu/new_ticket/it