

SeniorSystems

Financial Aid System Features

The Senior Financial Aid module makes it easy to track families applying for financial assistance. Applicant information can be easily linked from either the Admissions or student-based modules.

Our customizable checklists feature allows for tracking of all of requirements needed by family. Checklist reports and mailings allows you to notify families of outstanding items needed to complete the application.

The system support unlimited grants and named scholarships. Each grant allows you to tracks a budget amount so the system can report how much money is remaining for each award type. All financial aid awards are maintained in the module, but can easily be copied to Admissions for reporting or Accounts Receivable to be deducted from a tuition statement.

Sophisticated reports allows for award comparisons as well as reporting by grant and family income levels. Managed letters allow for customized decision and specialty grant letters through Microsoft Word mail merges.

- Unlimited number of financial aid applicants
- Shares parent biographical with the Senior Admissions System and Senior Accounts Receivable System (*see image 1 below*)
- Detailed financial aid awards history for an unlimited number of years
- User-definable Financial Aid, Decision and Grant Letters
- A user-definable applicant checklist including follow-up letters for each checklist item
- User-definable Loan and Grant types
- Budget tracking of grants
- Financial Aid form receipt tracking (PFS, 1040, W2 etc.)
- User-definable rating codes
- Unlimited decision and status codes
- Unlimited comments per applicant
- Customizable fields per family (*see image 2 below*)
- Statistics by grade (*see image 3 below*)

Financial Aid Maintenance-[Mr. and Mrs. Jasper Argonis - Award]

Family | Children | Checklist | Letters | Custom | Comments

Address: Mr. and Mrs. Jasper Argonis
1771 East Apple Avenue
Muskegon, MI 49442

Telephone Numbers:
Home: (616) 777-7272
Fax:
F. Work: (616) 755-3535
M. Work:
Cellular: (231) 737-5847
Other 2:
Other 3:

P1 | P2

Status:
Family ID: ARG10
Year: 2003
Status: Award
Appl. Type: Returning
FA Letter: Loan Information
Sent Date:

Parent Information:
Appl. Recd: 11-15-2006
Total Income: 70,000.00
 SSS Complete: 02-15-2007
Effective Income: 45,000.00
 Appl. Complete: 02-28-2007
Financial Need: 16,000.00
No. of Parents: 2
Est. Parent Cont: 5,000.00
No. of Working Parents: 2
Parent Offer Amt: 2,000.00
No. of Children: 3
Unmet Need: 6,000.00
Decision Date: 03-15-2007
Ratings:

Apply
Apply

OK Cancel Delete

NUM

Financial Aid Biography Screenshot – Image 1

Statistics Maintenance - (2007)

Statistics | Calculations

Statistics Details

	School	Grade	D: Tuition	B: Tuition	D: Fees	B: Fees	D: Male	B: Male	Tot Male	D: Female	B: Fe
	Lower	K	11,000.00	0.00	200.00	0.00	0	0	0	0	
✓	Lower	1	11,000.00	0.00	200.00	0.00	19	0	19	26	
✓	Lower	2	11,000.00	0.00	200.00	0.00	25	0	25	28	
✓	Lower	3	11,000.00	0.00	200.00	0.00	30	0	30	37	
✓	Lower	4	13,500.00	0.00	200.00	0.00	30	0	30	38	
✓	Lower	5	13,500.00	0.00	200.00	0.00	31	0	31	34	
✓	Middle	6	15,000.00	0.00	500.00	0.00	35	0	35	32	
✓	Middle	7	15,000.00	0.00	500.00	0.00	55	18	73	55	
✓	Middle	8	15,000.00	0.00	500.00	0.00	55	34	89	55	
✓	Upper	9	18,000.00	0.00	750.00	0.00	54	58	112	55	
✓	Upper	10	18,000.00	20,000.00	750.00	1,000.00	60	35	95	66	
✓	Upper	11	18,000.00	20,000.00	720.00	1,000.00	62	44	106	67	
✓	Upper	12	18,000.00	20,000.00	750.00	1,000.00	46	66	112	63	
✓									0		
Totals							502	255	757	556	

Buttons: Delete, Minorities, OK, Cancel

Financial Aid Customizable Fields Screenshot – Image 2

Reporting Features

- User-definable query system allows for the easy selecting and sorting of records
- Reports by grade, status, application type and more
- Applicant Sheet contains a complete view of the applicant's record
- Grant Summary by applicant or family
- Minority Grant Summaries
- Detailed decision lists and reports
- Financial Aid Analysis by Grade
- Parent/Guardian reporting including employment, custody and mailing preference
- Reporting by Income and Grant Levels
- Crystal Solutions for building your own reports
- Student worksheet allows user-definable column selection

Mailing and Export Features

- Designed to work seamlessly with all industry standard word processing programs
- All targeted mailing functions update the applicants record in order to prevent duplicate mailings
- A simple and effective Financial Aid and Decision letter merge function is included
- User-definable decisions letters allow you to tailor your response to the applicant
- Reminder mailing function for notifying parents of missing forms
- User-definable query system allows for the easy selecting and sorting of records
- Student/Parent label printing is consistent and easy
- Additional forms supported include (Standard Envelopes, Postcards, Index Cards and Labels)