



ONLINESMART MANUAL

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The procedures & information in this manual are revised on an 'as needed' basis to assist our clients in meeting regulatory, reporting, and daily operational needs / standards as they are identified. Schools are responsible to comply with Federal / Accrediting / State regulations; SMART does not assume any responsibility for provision / dissemination of regulatory information, its interpretation by the school, or for data input into the software.

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QUICK START GUIDE

LOGGING IN TO YOUR SCHOOL

1. Open Internet Explorer. OnlineSMART has been optimized for use with Internet Explorer. While using others browsers, such as Mozilla, Firefox, or Google Chrome, may work, there may be certain features of OnlineSMART which do not function properly in other browsers.
2. In the address bar, type <https://onlinesmart.net>.
3. Click the Login button, in the upper right portion of the web page, and select OnlineSMART.
4. Enter your Username, Password, and Company login.
5. Select submit.

ADDING A NEW PROSPECT OR STUDENT

1. All new students must start as a prospect. To enter a prospect, select Prospects from the main menu located at the far left.
2. A sub-menu will expand with 5 options; select New Prospect.
3. Enter the prospect's First and Last Name as well as phone number.
4. Select Ok in the bottom right of the screen.
5. Enter the prospect's SSN and select Save from the top menu.
6. Towards the top of the prospect's profile, select the Academics tab.
7. Select the appropriate course from the drop down and select Save.
8. View the prospect you just created by returning to Prospects and selecting Profiles.
9. This brings up a search engine; search for your prospect by their First or Last Name, Social Security Number, or Course.
10. Enroll the prospect to a student using the instructions below.

ENROLLING A STUDENT

1. From the prospect's profile, select the Enroll button from the top menu.
2. Select Day or Night next to the class.
3. Select how many weeks or months the class will be.
4. Input the Contract Graduation Date.
5. Select Save.

ENTERING A SCHEDULE

1. From a student's profile screen, select the Schedule icon at the top of the screen.
2. Select the button titled Insert Schedule Date at the bottom right corner of the calendar.
3. If you have a pre-saved template, select it from the drop down titled Load Template.
4. If you do not have a saved template, enter the hours under the days that the student should be scheduled.
5. Enter the dates that the student's schedule begins and ends. NOTE: We recommend scheduling to Max Time Frame; enter the Max Time Frame date as the end date.
6. From the top menu, select Insert Range to create this student's schedule.

ENTERING ATTENDANCE

1. Select Multiple Student Attendance under the Students sub-menu.
2. Start typing the student's last name and SMART will auto-populate the entire name.
3. Use the Tab key to navigate across the rows.
4. Select the correct date and enter the hours that were completed.



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5. Continue pressing the tab key to continue to the next row. SMART will auto populate the same student you just entered attendance for. Continue with this student or start typing the last name of another student.
6. **IMPORTANT:** If you try entering attendance without using Internet Explorer, the entries will not save. Additionally, you will want to save often in the event that you accidentally lose your information.

ENTERING GRADES

1. Select Multiple Test Grades or Multiple Lab Grades under the Students sub-menu.
2. Start typing the student's last name and SMART will auto-populate the entire name.
3. Use the Tab key to navigate across the rows.
4. Select the correct date and select the correct Lab or Test grade from the drop down menu.
5. Enter a grade for a test, or enter the number performed for a lab.
6. Choose whether you want this grade to effect the student's GPA.
7. Continue pressing the tab key to continue to the next row. SMART will auto populate the same student you just entered grades for. Continue with this student or start typing the last name of another student.
8. **IMPORTANT:** SMART advises that you select save, from the top menu, after entering 5 or 10 grades.



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SECTION 1: ACCESSING YOUR SCHOOL'S ONLINESMART SOFTWARE

Log in to OnlineSMART Software

1. Open Internet Explorer and click or type <https://onlinesmart.net>. (OnlineSMART is optimized for Internet Explorer; other web browsers, such as Firefox, may not be compatible with all of the features in OnlineSMART.)
2. Click the Login button, in the upper right portion of the web page, and select OnlineSMART.
3. Enter your Username, Password, and Company Name and select Submit.
4. This will take you into the announcements page where SMART posts important information and recent updates to the OnlineSMART software. Select your school name when you are ready to enter!

*****NOTE:** If the date and time are inaccurate on your computer, SMART systems will “bounce back” your log in information. Please update the date and time if this occurs, then attempt to log in again.



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SECTION 2: HOME PAGE

The Home Page

1. Log in to OnlineSMART.
2. Select Home from the main menu on the left of the screen.
3. Upon entering OnlineSMART, you will automatically be directed to the Home page.

The Purpose of the Home Page

The purpose of the Home page is to give you the ability to select the campus in which you want to work in when dealing with multiple campuses. Once you have selected a school, you will find a list of options to work in under that school, such as Students, Ledger, Reports, Prospects, Alumni, etc... Another feature of the Home page is to display important school notifications, such as students who are not in SAP, students in default, R2T4s that are incomplete, and students showing attendance during a leave of absence or after being dropped. Tickler reports can also be pulled from this screen to display prospect or student phone, mail, personal, and internet follow-ups.

Multiple Campus Selection

From the Home page, go to the center of the screen and select the name of the location you want to access. To verify what campus you are currently logged in to, you can view the Internet Explorer title bar at the top of the page from Internet Explorer 8 or you can hold the mouse over the tab in Internet Explorer 9, 10 and 11. Displayed format will be "School Management System – (the location you are working in)".

Notifications

1. To view Notifications, select the Load Notifications link located in the upper right corner of the screen. Once selected, OnlineSMART will display a list of system notifications: Not SAP, In Default, R2T4 Not Run, Attendance During LOA, Attendance While Dropped, Require Phone, Require Mail, Loan Follow-up, Personal Follow-ups, All Follow-Ups, Internet Leads.
2. If there is a number next to the notification, selecting one of these notifications will display the group of prospects or students this alert pertains to. You can then select the name of a specific prospect or student and it will take you to their profile screen. From their profile screen, you can address the issue which you were notified about.



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SECTION 3: USER ADMINISTRATION

The User Administration Page

1. Log in to OnlineSMART.
2. Select User Administration from the main menu on the left side of the screen. You will be directed to a screen where you have the option to change your password or, if you are a user rights administrator, create user rights.

The Purpose of the User Administration Page

The purpose of the User Administration page is to create users and assign them access roles. This is also where a user will go to change their individual password. You will see different types of search filters listed on this page, these filters are preset by SMART; please do not edit them.

USER ADMINISTRATION: CHANGE PASSWORD

Changing Your Password

1. Log in to OnlineSMART.
2. Select User Administration from the main menu on the left side of the screen.
3. From the User Administration page, select the Change Password option.
4. A dialogue box will pop up and prompt you to change your password. REMEMBER THIS PASSWORD. SMART Technical support or your system administrator cannot retrieve your password. However, your system administrator can reset your password if needed.

USER ADMINISTRATION: USER RIGHTS

User Rights Page

1. Log in to OnlineSMART.
2. Select User Administration from the main menu on the left of the screen.
3. You will automatically be directed to a page where you can select Change Password or User Rights (if you are an authorized user rights administrator).
4. Select User Rights.
5. You will automatically be directed to the Company Level Administration page.

Role Administration

The Role Administration page is where you can view, but not edit, a list of hardcoded, active roles available for assignment. You can also create roles on this page. This feature is here to give administrators the ability to view access levels for the different roles available for assignment, as well as create custom roles to utilize when assigning rights to users.

Entering the Role Administration Page

1. From Company Level Administration, select Role Administration from the sub-menu on the left of the screen.
2. A list of all active roles will populate. These exist within OnlineSMART so schools can assign different levels of access to different users.
3. To view a custom role and its specific capabilities, select the View (for hardcoded roles) or Edit (for user created roles) option to the right of its Name and Description.
4. This will open a new window that shows the Role Name and Description, along with the list of Available (to the left of the screen) and Assigned (to the right of the screen) Navigation and Reports associated with that role. In the Navigation and Reports tabs, you will need to select the school you are working in from the dropdown in order to see what is available and assigned to the role.
5. You can navigate this area by selecting the Navigation or Reports tab to view information.
6. Exit this screen by selecting the X in the upper right corner of the window.



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Creating a Custom Role

1. From the Role Administration page, select the New button at the top of the screen.
2. A new window will open displaying a blank template.
3. Enter a Role Name.
4. Enter a Description.
5. Select the school you are creating this role for from the Select School dropdown.
6. From the Navigation tab, highlight the roles you want to assign to this custom role from the Available box and use the directional keys to move the roles to the Assigned box.
7. Now select the Reports tab.
8. Highlight the reports you want to assign to this custom role from the Available box and use the directional keys to move the reports to the Assigned box.
9. Select Save from the menu at the top of the screen.
10. Exit this screen using the X in the upper right corner of the window.
11. This role will now appear in your selection of Available roles when creating user access.

User Rights

The User Rights page is where you can view all users that have access to your OnlineSMART software. You can also view the level of access a user has, reset a user's passwords, inactivate or reactivate a user, delete a user, edit a user's access to the software, and create a new user from this page.

Entering the User Rights Page

1. From Company Level Administration, select User Rights from the sub-menu options on the left of the screen.
2. A list of all users will populate. From this screen you can see user details such as Username, Last Name, First Name, and Is Active.

Resetting a User's Password

1. Once inside the User Rights page, select the username that you need to reset the password for from the populated list.
2. A new window will open displaying that user's detailed information. Select the Change Password link.
3. This reveals the Password and Confirmation boxes; enter the new password in both boxes and select OK.
4. Select Save from the menu at the top of the screen.
5. Exit this screen by selecting the X in the upper right hand corner of the window.

Creating a New User

1. From the User Rights page, select the New User button at the top of the screen.
2. A new window will open displaying a blank template.
3. Enter a User Name. (SMART recommends using the first initial, last name format. Example: Robert Smith would be rsmith. THIS CANNOT BE EDITED IN THE FUTURE.)
4. Enter the user's First Name.
5. Enter the user's Last Name.
6. Enter the user's Email Address (optional).
7. Enter a Password and confirm that password.
8. Once you have saved this information, you will automatically be directed to the School Assignment tab.
9. Highlight the campus(es) you want the user to have access to in the Available box and use the directional buttons in the middle of the screen to move them to the Assigned box.
10. Once you have made changes to a user's assigned school, you will need to select the Save School Assignment button.
11. Now, select the Role-Access Assignment tab.
12. You will see a dropdown menu; select the campus you wish to designate user rights for.
13. Highlight the roles you want to assign your user in the list of Available Roles and use the directional keys to move the roles to the Modify Access box. IMPORTANT: Categories are broken down by Administration, Reports, Prospect, Student, Alumni, and Ledger; in order to move over a function, you must also move over the category header. For example: If you want a user to have access to Student Attendance, you will move over the Student Attendance role, as well as the category header which, in this case, would be Student.



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14. Once you have moved all roles you want to assign to the user into the Modify Access box, Select Save from the menu at the top of the screen.
15. Repeat steps 12, 13, and 14 for all assigned campuses.
16. Exit this screen using the X in the upper right corner of the window.

Viewing a User's Level of Access

1. From the User Rights page, select a username from the populated list.
2. A new window will open displaying that user's detailed information.
3. There are two tabs in this window, School Assignment and Role-Access Assignment.
4. From the School Assignment tab, you can see which school(s) the user has access to. If your software houses databases for multiple campuses, the schools the user does not have access to will be in the Available box to the left of the screen and the schools they do have access to will be in the Assigned box to the right of the screen.
5. From the Role-Access Assignment tab, you can see which roles are already assigned to a user. All roles that exist appear in the Available Roles box to the left of the screen and the assigned roles will appear in the Modify Access box to the right of the screen.
6. Exit this screen by selecting the X in the upper right corner of the window.

Editing a User's School Assignment

1. From the User Rights page, select the user that you wish to edit from the populated list.
2. A new window will open displaying that user's detailed information.
3. To edit or add to the user's School Assignment, highlight the school name and use the directional buttons in the middle of the screen to move the school to Available or Assigned. (Schools the user does not have access to, are listed under Available and schools they do have access to, are listed under Assigned.)
4. Once you have made a change to a user's assigned school, you will need to click on the Save School Assignment button.
5. Then select Save from the top menu of the screen.
6. You can exit this screen by clicking on the X in the upper right corner of the window.

Editing a User's Role-Access Assignment

1. From the User Rights page, select the user that you wish to edit from the populated list.
2. A new window will open displaying that user's detailed information.
3. Select the Role-Access Assignment tab.
4. To edit or add to the user's Role-Access Assignment, highlight the role name and use the directional buttons in the middle of the screen to move the role to Available Roles or Modify Access. (All roles are listed under Available Roles; roles the user has access to, are listed under Modify Access.)
5. Once you have made changes to the user's assigned roles, you will need to select Save from the top menu of the screen.
6. Exit this screen by selecting the X in the upper right corner of the window.

NOTE: You cannot edit a username once it is saved. You can edit the user's first and last name, email address, School Assignment and the Role-Access Assignment.

Inactivating/Deleting a User

1. From the User Rights page, select a username from the populated list.
2. A new window will open displaying that user's detailed information.
3. To inactivate a user, uncheck the box that says Active.
4. Select Save from the top menu of the screen.
5. From here, select the Delete button, if you wish to delete the user.
6. A new window will open requesting you to confirm deletion, select Ok.
7. Exit this screen by selecting the X in the upper right corner of the window.



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SECTION 4: ADMINISTRATION

The Administration Pages

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. The Administration menu option will display various sub-menu options to select from.

The Purpose of the Administration Pages

The Administration pages allow you to set parameters that dictate how OnlineSMART works. In the pages under the Administration menu you will tell the system what your minimum attendance percentage is as well as your G.P.A., test weighting, and a variety of other vital calculations unique to your school. These options are very crucial in determining how OnlineSMART will work for your school. The information in these pages need to be entered correctly in order for reports, calculations, and ledgers to meet your school's requirements. Generally, only a school administrator or staff member appointed by the school administrator will have access to these options. SMART is not liable for incorrect entries.

ADMINISTRATION: 1098-T ELECTRONIC FILING

Administration Menu: 1098-T Electronic Filing

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select 1098-T Electronic Filing.
4. You will automatically be directed to the 1098-T Electronic Filing page.

The Purpose of the 1098-T Electronic Filing Page

This is the page where software users generate the electronic 1098-T file for submission to the IRS. Please NOTE: The information you type into these fields will need to be retyped in the future, this will not be saved. You will also find reports for the 1098-T, under Reports: Annual: 1098-T, that will reflect the information in the electronic file. 1098-T refers to the IRS Form 1098-T that a student receives, showing how much qualified tuition and related expenses he/she paid during the tax year. The student turns this form (Form B) into their tax preparer and the amount is deducted from the total amount of taxable income for the year, assuming it falls in line with a host of other rules and requirements that are detailed on the IRS website. **Student payment information must be posted to the ledger correctly in order to pull correctly on the 1098-T.** SMART is not liable for incorrect entries.

1. **Payment Year** - When filing 1098-Ts, use the tax year for which you are reporting. For example: If the current year is 2016 then you would be filing 2015 taxes. The Payment Year you would choose in OnlineSMART would be 2015.
2. **File Type** - There are two filing types: Original and Correction. *Original* is selected if you are generating the report for the first time or if you are generating a replacement file. *Correction* is selected for generating a correction file. ****NOTE:** If you need to file a *Replacement* or *Correction* file, please contact SMART support for further assistance.
3. **TCC** - To file electronically, you must first apply for a Transmitter Control Code (TCC) number with the IRS. You may go to the IRS website and download form 4419 (Application for Filing Information Returns Electronically-FIRE). Schools must apply for a TCC number by filling out an IRS Form 4419. Schools will fax this form to the IRS at 1-877-477-0572. Once you have faxed the application and received a TCC number, you are ready to file. SMART does not have this information; you will need to contact the IRS if this information has been lost.
4. **TIN Number** - This field requires you to input your tax identification number that you have received from the IRS; also referred to as an EIN. SMART does not have this information; you will need to contact the IRS if this information has been lost.
5. **Contact Name, Phone, and Email** - Enter the contact information for the person at your organization who handles the filing of the 1098-T.
6. **Payer Name Control** - The Payer Name Control field will be the first four letters of the name your business files under. SMART does not have this information; you will need to contact IRS if this information has been lost.



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7. **Payments Received for Qualified Tuition and Related Expenses** - Please leave this box checked.
8. **Scholarships or Grants** - Please leave this box checked.
9. **Generate Export File** - The Generate Export File button generates the 1098-T report. You will be asked to name and save the report somewhere on your computer. Choose a name you will remember such as 2014 1098T. Also, be sure to save it somewhere you will remember, like your desktop. This will be the file you upload electronically to the IRS FIRE website. Make sure you save the file; do not open it, because the format will not match when you upload the file to the IRS.

Printing the 1098-T Forms

Filing 1098-Ts with the IRS must be done electronically through the steps above. OnlineSMART comes with the ability to print 1098-T forms directly from the software for student records.

1. From the main menu on the left of the screen, select Reports: Standard: Annual: 1098-T.
2. Select the appropriate year. Example: 1098-T/2014.
3. Select the version of the report you wish to run. 1098-T 2014 is the report that will allow you to print the forms for students.
4. A report filter pops up, either in a new browser window or new browser tab. Select Changed Reporting Method to YES or NO (this field refers to if you filed differently last year, like on paper, and this year you are doing electronic. Unless you have had special circumstances in the past, select NO).
5. Select which copy you are generating, Copy B or Copy C.
6. Set Print to Form to NO.
7. Select the View Report button in the upper right corner.
8. Now you will go to the middle of the report header and select the blue export button. Select PDF from the dropdown menu.
9. Now, in Internet Explorer, a taskbar or box pops up asking you if you want to Open or Save the report file.
10. Select Open to view, or Save if you would like to view later.
11. Your school does not need to purchase 1098-T forms; SMART formats the report so it prints the form automatically. We do recommend purchasing 1098-T envelopes.

ADMINISTRATION: ADMISSION REPRESENTATIVES

Administration Menu: Admission Representatives

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Admission Representatives.
4. You will automatically be directed to the Admission Representatives page.

The Purpose of the Admission Representatives Page

The Admission Representatives page in OnlineSMART allows you to enter your school's admissions representatives. You may then select their name in the dropdown box when building a prospect or student profile. This dropdown will be located in the Personal tab, at the bottom of the screen in the Demographics section. By listing a representative, you will now be able to run statistics reports and track what your admissions representatives are, or are not, accomplishing.

Adding an Admissions Representative to this Page

To add an admissions representative's name, you will need to enter the representative's first and last name and select Save. We advise editing the names of admissions representatives only to correct spelling or for name changes.



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ADMINISTRATION: BASIC SETUP

Administration Menu: Basic Setup

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Basic Setup.
4. You will automatically be directed to the Basic Setup page.

The Purpose of the Basic Setup Page

The Basic Setup page is where you will set parameters that OnlineSMART will use to calculate your school's specific minimum attendance percentage, GPA minimums, and test weighting. You will also set certain rules for ledgers and attendance. This is where you will enter school Contact Information, Licenses, Options, Feature Settings, and set the times for your tickler periods. This portion of the software is extremely important to the functionality of OnlineSMART. If data on this page is set incorrectly, your SAP and other calculations will not compute accurately. Please follow instructions carefully throughout the Basic Setup page to ensure that your information is setup correctly with your school's specific parameters and required percent standards. SMART is not liable for incorrect entries.

ADMINISTRATION: BASIC SETUP: SCHOOL CONTACT TAB

Administration Menu: Basic Setup: School Contact Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Basic Setup.
4. You will automatically be directed to the Basic Setup page, School Contact tab.

The Purpose of the School Contact Tab

The School Contact tab is where you will store the school owner's name, and the school's address, region, and phone number. The address information will be displayed on multiple reports from SMART software.

ADMINISTRATION: BASIC SETUP: SCHOOL LICENSES TAB

Administration Menu: Basic Setup: School Licenses Tab

1. Select Administration from the main menu on the left side of the screen.
2. Select Basic Setup.
3. You will automatically be directed to the Basic Setup page.
4. From here, select the School Licenses tab.

The Purpose of the School Licenses Tab

The School Licenses tab allows you to enter important school information (often needed on reports, forms etc.) in one centralized location. If you need a number or ID, you can quickly pull up this tab in OnlineSMART instead of searching through paperwork or files. The information stored in OnlineSMART is as follows: School License Number, Pell ID Number (needed if school is to import ISIRs), Accreditation Number, OPE ID, Loan Number, DUNS Number, and TIN Number.

ADMINISTRATION: BASIC SETUP: SCHOOL OPTIONS TAB

Administration Menu: Basic Setup: School Options Tab

1. Select Administration from the main menu on the left side of the screen.
2. Select Basic Setup.
3. You will automatically be directed to the Basic Setup page.
4. From here, select the School Options tab.



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The Purpose of the School Options Tab

School Options allows you to choose certain options and set certain parameters that control how OnlineSMART works and what OnlineSMART includes in its calculations. As mentioned earlier in this section, this feature is extremely important to the functionality of your database. If you have incorrect information listed here your calculations will not be accurate according to your school's parameters. Please read carefully through the instructions in this section when setting up your school parameters and required percent standards. SMART is not liable for incorrect entries.

Entering Information in the School Options Tab

1. When would I want to check the box: Enable Title IV Reminders?
You will check this box if you want to enable Title IV reminders when updating the Financial Aid Worksheet (Fin Aid) page; this integrates with Flags in the Notification section. You can also set the interval days for the reminders located to the right of this check box.
2. When would I want to check the box: Enable Title IV Hold on Ledger?
You would check this box if you want to enable Title IV Holds when updating the Financial Aid Worksheet (Fin Aid) page; this will prevent you from making postings on the ledger if this box is checked on the Financial Aid Worksheet.
3. When would I change the options in Prospect Creation?
This section is pre-determined by SMART. By selecting Name\Address this will change the entry information that is necessary to create a new prospect profile.
4. What is the Destination Point ID (TG#)?
A destination point is any TG Mailbox (HeadDestNum) number that is listed as an active sender/receiver of Title IV data on the SAIG participant file. This is an electronic mailbox for DOE.
5. What is the Load ISIR Data field for?
This field is to select how you want your ISIR data to load to students' profiles. If you are uploading ISIRs into SMART, you would choose Automatically. By doing so, this will update currently existing prospect or student profiles or create a new prospect profile if none currently exists. You would choose the Manual option if you are going to manually enter ISIR information. You would choose None if your school elects not to load ISIR data into a student's profile.
6. What year would I choose for the current processing year?
The current processing year corresponds to the current academic year. The common academic year is considered from July 1 to June 30 of the following year. For example: From July 1, 2015 to June 30, 2016 you would use 2015/2016 as the current processing year. This sets the default year for the Financial Aid Worksheet and Ledger which will auto populate new entries with the latter year. For example: In the above example the year for new entries in the Financial Aid Worksheet and Ledger would be automatically set to 2016. You should update this setting each July 1st.

ADMINISTRATION: BASIC SETUP: SCHOOL FEATURES TAB

Administration Menu: Basic Setup: School Features Tab

1. Select Administration from the main menu on the left side of the screen.
2. Select Basic Setup.
3. You will automatically be directed to the Basic Setup page.
4. From here, select the School Features tab.

The School Features Tab

The School Features tab allows you to choose how you want attendance hours to be displayed and entered, what information should be included on some reports, whether you will allow ledger editing, and more. This tab is important because it allows the school to set their own parameters and guidelines on how certain aspects of OnlineSMART will work. SMART is not liable for incorrect entries.

1. Lab Hours Included:
This will show not only labs performed, but also hours associated with them. Schools may or may not be required to keep track of lab hours associated with labs performed. This is an optional field and is not required to be utilized.



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2. **Include SSN on Student Reports:**
This will include Social Security Numbers on student reports. It is highly recommend by SMART not to check this box.
3. **Include Last 4 SSN Digits on Student Reports:**
This will include the last 4 digits of the Social Security Numbers on student reports. In order to check this box, you will need to initially check the Include SSN on Student Reports box. However, this will only show the last 4 digits of students' social security numbers.
4. **Attendance in Minutes:**
This option will allow you to track attendance down to the minute. When this option is chosen, there will be a field for Days (if you are entering a record for more than one day), Hours, and Minutes in the attendance screen. NOTE: If your school utilizes the SMARTTime time and attendance software to send student hours to OnlineSMART, time will be converted from hours to a decimal value during the close out process. If you also select the Attendance in Minutes option in OnlineSMART, the decimal value sent over from SMARTTime will be converted back to hours; this may cause a discrepancy in actual time. SMART recommends not using this feature if you are using SMARTTime for time and attendance tracking.
5. **Attendance Breakdown:**
The Attendance Breakdown option allows you to track exactly where a student's time was spent each day. If you choose the option to display the attendance breakdown you will have a field for recording: Days, Demo Hours, Non Clinic Hours, Clinic Hours, and Total Hours. NOTE: Attendance breakdown information will not print on attendance reports.
6. **Overwrite Existing Referral Code for Existing Leads:**
Choosing this option allows you to make changes to the Referral Code field in a prospect's Demographic section of the Personal tab.
7. **Allow Ledger Editing:**
Choosing this option allows you to edit a student's ledger, with the exception of the date field for disbursement and posting.
8. **Include Hours and Credits When Entering Test Grades:**
Some institutions are required to track hours and credits when grading tests. OnlineSMART will automatically leave this information out of the Grades page (where you enter student's grades for their profile). However, if your school is required to track this information you can set this parameter. If set, the user will be required to record hours and credits when entering test grades.
9. **Overwrite Address for Existing Leads:**
Choosing this option allows you to make changes to a prospect's address in the Basic Information section of the Personal tab.
10. **Overwrite Phone for Existing Leads:**
Choosing this option allows you to make changes to the phone number(s) in the Phone & Email section of a prospect's Personal tab.
11. **Overwrite Demographic Information for Existing Leads:**
Choosing this option allows you to make changes to the information in the Demographic section of a prospect's Personal tab.
12. **Use Credits Conversion on SAP Report:**
By choosing this option, you will replace the Scheduled Hours vs. Actual Hours section on your SAP report with Attempted Credits vs. Earned Credits. The Attempted Credits field pulls from the Scheduled Credits per Week field found in a student's Profile page, under the Academics tab. It takes that number and multiplies it by the number of weeks the student has been enrolled. It then pulls the earned credits number from what has been input in the Grades and Lab Grades pages.



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ADMINISTRATION: BASIC SETUP: SCHOOL ACADEMICS TAB

Administration Menu: Basic Setup: School Academics Tab

1. Select Administration from the main menu on the left side of the screen.
2. Select Basic Setup.
3. You will automatically be directed to the Basic Setup page.
4. From here, select the School Academics tab.

The School Academics Tab

The School Academics tab is where you will set your school's required attendance percentage and GPA percent standards, and record your school's grade weighting scale. This page is a very important part of the functionality of OnlineSMART. If you do not enter your required attendance or grade weighting correctly, then it will not calculate correctly on your reports.

1. **Recalc (recalculate) Students Button** - If any of the areas on the Academic tab are changed, selecting the Recalc Students button will recalculate items such as the Attendance Percentage, GPA, and SAP (Y/N). Since grade weighting could change and affect a student's GPA, recalculating ensures that all active students' information is up to date with the latest, basic setup values.
2. **Minimum GPA Value Field** - Another important field of the setup is Minimum GPA. This is where you will record your school's required minimum GPA, a component of satisfactory academic progress (SAP). Without this field completed, OnlineSMART will not know at what point a student is not meeting their minimum requirements.
3. **Minimum Attendance % Field** - Another important field of the setup is Minimum Attendance %. This is where you will record your school's required Minimum Attendance %, a component of satisfactory academic progress (SAP). Without this field completed, OnlineSMART will not know at what point a student is not meeting their minimum requirements.
4. **Perform Alternate GPA Calculation Box** - Alternate GPA Calculation would be used when you are entering credits/hours when inputting a student's test grades. When this box is checked, it would recalculate the student's GPA to reflect time put in.
5. **Grade Weighting Fields** - These fields are where you setup your Grade Weighting scale. Here you will tell OnlineSMART what percent Tests (Theory), Major Tests, and Labs will count toward calculating the GPA. Lab Definitions and Test Definitions are the sections where SMART allows your school to delegate Lab, Major, or Theory requirements.
6. **Grade Weighting-Test (Theory) Field** - You will enter what percentage the Theory tests will count towards the Monthly GPA calculation. This weighting can only be used with Test Definitions.
7. **Grade Weighting-Major Test/Lab Field** - You will enter what percentage the Major Tests/Lab will count towards the monthly GPA calculation. This weighting can be used with Lab Definitions and Test Definitions.
8. **Grade Weighting-Labs Field** - You will enter what percentage the Labs count towards the monthly GPA calculation. This weighting can only be used with Lab Definitions.
9. **Test + Major Test + Lab Weighting Field** - This will be the total of the 3 grade weighting options. The total of the 3 should equal 100%.
10. **Include Signature on Transcript Box** - If your school is required to obtain signatures on academic transcripts, you can choose this option. When you choose this option a line will appear on the academic transcript for the student and school official to sign and date.
11. **Include GPA Legend Box (Typically Grayed Out)** - If you choose this option the GPA legend will appear on transcripts. The legend is the grade weighting scale mentioned earlier. A student will be able to see what percentage of Theory, Major Tests, and Lab Grades count toward their GPA. This can only be checked when the Alternate GPA Calculation box is also checked.
12. **Signature Field** - When you have chosen to include a signature on an academic transcript, this field allows you to type the name of the school official who is supposed to sign the report. If this is open to any school official or multiple ones, you may leave this field blank.
13. **Title Field** - When choosing to include a signature on an academic transcript, this field allows you to type the title of the school official such as Instructor, Director, or School Official.



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ADMINISTRATION: BASIC SETUP: TICKLER PERIOD TAB

Administration Menu: Basic Setup: Tickler Period Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Basic Setup.
4. You will automatically be directed to the Basic Setup page.
5. From here, select the Tickler Period tab.

The Purpose of the Tickler Period Tab

This tab allows you to specify time periods for your notifications such as follow up phone calls or mail outs to prospects and students who have graduated or dropped. From the Home page of SMART, select the Load Notifications link to display a list of alerts pertaining to follow up calls and mail outs.

Phone/Mail/Loan Repayment

This tab allows you to enter when you want to be notified. Example: When you enter a new prospect, you want to make sure an admissions representative makes contact the 1st day the prospect is entered. You would enter a 1 in the 1st box for the appropriate follow up, Phone or Mail. The prospect will stay on the tickler report for five days and then be automatically removed from the Tickler Reports notification until the next tickler period. The Loan Repayment section is different only because it notifies by month, not days, and this section pertains to Alumni.

ADMINISTRATION: CODES

Administration Menu: Codes

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Codes.
4. You will automatically be directed to the Codes page.

The Purpose of the Codes Page

The Codes page allows you to create certain codes. These codes will later be used in a student/prospect's profile. They may appear in some reports, be used for flagging purposes when working in a student's profile, or be used to help filter information when pulling reports. The code options are: Admission Test, Contract, Drop, Employment, Pass-Place, Referral, and Tracking.

ADMINISTRATION: CODES: ADMISSION TEST CODES TAB

Administration Menu: Codes: Admission Test Codes Tab

1. Log in to OnlineSMART.
 2. Select Administration from the main menu on the left side of the screen.
 3. Select Codes.
- You will automatically be directed to the Codes page inside the Admission Test Codes tab.



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The Purpose of the Admission Test Codes Tab

The Admission Test Codes tab is where you can input the names of certain admissions tests that students may be required to take. This information will then be used in the Admissions Test tab under the prospect's or student's profile. An example of an Admission Test Code would be ATB (Ability to Benefit) for tests such as Wonderlic tests. Some schools may require all students to take a school admission test before being approved for enrollment. Some schools may only require an admission test be taken for ATB students.

Example:

CodeName	Description		
ATB TEST	PRE ENROLLMENT EXAM	Edit	Delete

ADMINISTRATION: CODES: CONTRACT CODES TAB

Administration Menu: Codes: Contract Codes Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Codes.
4. You will automatically be directed to the Codes page.
5. From here, select the Contract Codes tab.

The Purpose of the Contract Codes Tab

The Contract Codes tab is user defined. This selection will be used in the Financial tab, under the student's profile. The user (institution) will define criteria to use for this field, such as Cash Pay, Title 4, Pell, and Scholarship. NOTE: Reports cannot be queried by Contract Code.

Example:

Name	Description	DateCreated	
CASH PAY	CASH PAY STUDENT	12/2/2010	Edit

ADMINISTRATION: CODES: DROP CODES TAB

Administration Menu: Codes: Drop Codes Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Codes.
4. You will automatically be directed to the Codes page.
5. From here, select the Drop Codes tab.

The Purpose of the Drop Codes Tab

Drop Codes are used to track the reason a student dropped out of your institution. There are some Drop Codes that will already be hardcoded and cannot be changed by a user. Drop codes are instrumental in determining exclusions for some compliance reports.

Example:

Code	Description	
A	Health Reasons	Edit



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ADMINISTRATION: CODES: EMPLOYMENT CODES TAB

Administration Menu: Codes: Employment Codes Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Codes.
4. You will automatically be directed to the Codes page.
5. From here, select the Employment Codes tab.

The Purpose of the Employment Codes Tab

The Employment Codes tab is used to create employment tracking codes for alumni. This will be the criteria you use to track students' employment status once they have graduated from your institution. Information on this page may be needed to report to certain agencies or accrediting bodies. This page is completely user-defined and the school administrator will decide how these codes should be worded or used. The information will later be utilized when a student becomes an Alumnus (graduate). You will choose from the list of employment codes you have created and assign a code in an Alumnus' profile. Any codes that you list here will be available in a dropdown menu in the Alumni profiles to assign to each alumnus.

Example:

Abbreviation	Description	DateCreated	
ASSISTANT	ASSISTANT IN A SALON	10/21/2010	Edit

ADMINISTRATION: CODES: PASS-PLACE CODES TAB

Administration Menu: Codes: Pass-Place Codes Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Codes.
4. You will automatically be directed to the Codes page.
5. From here, select the Pass-Place Codes tab.

The Purpose of the Pass-Place Codes Tab

The Pass-Place codes are an important feature to utilize in OnlineSMART. Pass-Place data may be required to report to agencies or accrediting bodies. Pass-Place Codes are hardcoded and cannot be changed. The list of Pass-Place Codes will later be used in Alumni's profiles when a student graduates from your institution and will indicate what happened to your student during the licensing/certification process.

Example:

Code	Description	
FP	Failed Practical	Edit

ADMINISTRATION: CODES: REFERRAL CODES TAB

Administration Menu: Codes: Referral Codes Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Codes.
4. You will automatically be directed to the Codes page.
5. From here, select the Referral Codes tab.



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The Purpose of the Referral Codes Tab

The Referral Codes tab is used to list all Referral Codes that your institution is required, or wishes, to track. Standard Referral Codes come hardcoded and cannot be deleted or edited. However, a school administrator has the ability to add other Referral Codes that your school may use, which can be edited later if needed. Up to 6 additional referral codes can be added and must be entered with a code of U1 through U6. You can track the code, name, cost per lead, cost measure, and EIL default. The Referral Codes added here are used in the personal tab of a prospect/student's profile. Some institutions may be required to track this information, some may wish to track it, and others do not have to utilize this portion if it does not pertain to them.

Example:

Code	Name	Cost Per Lead	Cost Measure	EIL Default	
U1	Facebook	0	<input type="text"/>	<input type="checkbox"/>	Edit

ADMINISTRATION: CODES: TRACKING CODES TAB

Administration Menu: Codes: Tracking Codes Tab

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Codes.
4. You will automatically be directed to the Codes page.
5. From here, select the Tracking Codes tab.

The Purpose of the Tracking Codes Tab

The Tracking Codes tab is a user defined portion of OnlineSMART. Tracking Codes are not hardcoded. An administrator determines exactly what they want to use the Tracking Codes tab for. The Tracking Codes that are created here will be used in a student's Personal tab in the student's profile. You will have the ability to query various reports by Tracking Codes. You can also run the general report for each student and Tracking Codes will appear in the demographic section of this report.

NOTE: The maximum number of characters for the Name field is 30 and the maximum number of characters for the Description field is 50.

Example:

Name	Description	DateCreated	
Class 1	Class 1	7/11/2011	Edit
Class 2	Class 2	7/11/2011	Edit
Class 3	Class 3	7/11/2011	Edit
LEVEL 1 0-450	LEVEL 1 STUDENTS	10/15/2010	Edit
LEVEL 2 450-900	LEVEL 2 STUDENTS	10/15/2010	Edit
LEVEL 3 900-1350	LEVEL 3 STUDENTS	10/15/2010	Edit
LEVEL 4 1350-1800	LEVEL 4 STUDENTS	10/15/2010	Edit

ADMINISTRATION: COURSE

Administration Menu: Course

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Course.
4. You will automatically be directed to an empty template on the Course page.



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The Purpose of the Course Page

The Course page is very useful within the functionality of OnlineSMART. On this page, a school can distinguish data separately for all courses offered at your institution. You will later be assigning one of the courses you created for each prospect/student. Once you assign a course to a prospect/student, their profile will be updated with information pertaining to the course. Information regarding the course will become readily available in their profile under the Academics tab and the Financial tab. Information you will find: name of the course, hours in the course, and the cost of the course.

Adding a New Course

SMART does NOT recommend creating multiple types of the same course. For example: Do not create a full time course and a part time course if the courses are identical. A student can be marked Full Time or Part Time on the Financial tab. SMART DOES recommend updating the financials to the course whenever there are tuition changes as opposed to creating a new course. Editing financials will only update future students assigned to that course, not any historical or active data. You may cause inaccuracies in your annual reports that are submitted to accrediting bodies and to DOE by adding additional courses for schedule differences.

1. Select New from the top menu before you start entering course data.
2. Enter the name of the course in the Name field. Example: Cosmetology. This cannot match any other course you have setup.
3. Enter the description in the Description field. Example: Cos. This also cannot match any other course you have setup.
4. Enter the total hours or credits of the course in the Hours/Credits field. In most cases Credits will not apply but the option is included as a tool for those schools who track credits.
5. Enter the CIP Code (Classification of Instructional Programs) in the appropriate field. The purpose of the Classification of Instructional Programs (CIP) is to provide a taxonomic scheme that will support the accurate tracking, assessment, and reporting of fields of study and program completions activity. CIP was originally developed by the U.S. Department of Education's National Center for Education Statistics (NCES) in 1980, with revisions occurring in 1985, 1990, and 2000. A school's programs are listed by CIP Code on their ECAR and on IPEDS.
6. Start of Week determines the day of the week this course starts on every week. Select the dropdown menu for the Start of Week and select the appropriate day.
7. Select the box next to Allow Partial Attempted Credits only if this option applies to your institution. Allow Partial Attempted Credits would be checked if you wanted to add in a partial credit. For example: If you wanted to give a student 3.5 credits, it would allow the system to do so without having to give them an entire credit, making it either 3 credits or 4.
8. Select Save from the top menu to save the template.
9. Go to All Courses and select the course you just created from the dropdown menu.
10. Under the Contract/Maintenance Figures tab you will enter the program costs. Enter a number in the Line Number field. *****NOTE: For every pay period you enter there must be a number assigned, and the number cannot start with a zero. You also cannot enter letters. The best recommendations when utilizing this table is to enter each of your school's pay periods starting with 1, 2, 3, 4. The amount you enter will depend on your school processes. Please check with your school administrator to see if your school processes financial aid in Payment Periods, Academic Years, or Full Upfront Payment. SMART staff will not know this information and will be unable to advise you. SMART is not liable for incorrect entries.**
11. Enter the total of tuition in the Tuition field. If using pay periods, enter the total tuition per each pay period. (Schools cost per hour times how many hours in the period.)
12. Enter any applicable fees in the Fees field. Example: Registration Fee and Enrollment Fee.
13. Enter kit and books charges in the Kit/Books field. If kits are taxed, you may add this to the Kit/Books cost, or if your auditor prefers it broken out, enter this in the Other field.
14. Enter any other applicable charges in the Other field. Anything entered in this field will not be calculated on the 1098-Ts.
15. The Contract field is calculated by OnlineSMART adding the above figures together.
16. Enter any cost of attendance figures associated with this course in the Maintenance field.
17. Select SAVE on the right side of each pay period row. It is advisable to add some additional rows.
18. Repeat steps 9-16 for all pay periods in the course.
19. Select the Hours/Credits Per Pay Periods tab.
20. The Line Number is auto populated by the entries you made in the previous tab. As mentioned above, any Hours/Credits pay period tab must have a number listed in these fields; it cannot start with a zero and cannot be a letter.



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21. Enter the total hours or credits of the course in the Contract Hours/Credits field. Whether you process in Payment Periods, Academic Years, or Full Upfront Payment, enter total hours or credits in Line Number 1, and all your schools Pay Periods in Line number 1. This will create a dropdown, when posting a new ledger entry on the Ledger page, to post payments by period.
22. Enter the total hours in each pay period starting in the Period 1 field. For example: If a course is 1800 hours your pay periods are as follows if your school processes in Payment Period: 0-450 hours, 451-900 hours, 901-1350 hours, and 1351-1800 hours. In the Line Number 1 you would enter 450 hours for the total number of hours in pay period 1. Again in Line Number 1 enter another 450 hours for the total number of hours in pay period 2, etc. This information will depend on if your school processes financial aid in Payment Periods, Academic Year, or Full Upfront. Please check with your school administrator to see if your school processes financial aid in Payment Periods, Academic Years, or Full Upfront Payment. SMART staff will not know this information. SMART is not liable for incorrect entries.
23. Repeat step 21 for all pay periods in the course.
24. Select the SAVE option on the right side of each pay period row.
25. Select Save in the upper left corner of this screen once all information has been entered.

All Courses Dropdown Menu

This dropdown menu is utilized when you have added a new course and need to go back to edit it; select the course you want to edit from the dropdown and make the necessary changes.

Editing an Existing Course

A good example of the need to edit an existing course would be an increase in tuition. SMART will allow the user to edit the course in this location. Select the course in the dropdown tab and edit the information that has changed. Please NOTE: Changing information here will not affect students in the past, only students that are newly enrolled into this updated course. This feature ensures that you will not edit past students' information or create multiple courses. SMART recommends updating the financials to the course whenever there are tuition changes as opposed to creating a new course. Editing financials will only update future students assigned to that course, not any historical or active data. By adding additional courses, you will create inaccurate annual reports that must be turned in to accrediting agencies and to DOE.

1. From the top of the screen, select the course you want to edit from the dropdown for All Courses.
2. If you are editing information in the top field, use the top Save button; if you are editing information in the payment line, use the Edit and Update buttons to save.

ADMINISTRATION: DATABASE EXTRACT

Administration Menu: Database Extract

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Database Extract.
4. You will automatically be directed to the Database Extract page.

The Purpose of the Database Extract Page

This page in SMART gives the school the ability to backup data stored in the SMART system. SMART does system backups every day at our secure server location. But it is always strongly recommended to have as many backups as possible. This process may take from 1 to 4 hours depending on the amount of data stored in OnlineSMART.

Instructions for Database Extract

1. Requirements: School will need to install WinZip as well as have Microsoft Access. You can install WinZip through the free installation at www.winzip.com.
2. Log in to OnlineSMART.
3. Select Administration.
4. Select Database Extract.
5. Select Export. Please wait for File to be created. This can take up to a few hours depending on the size of your database.
6. Select the link created from generating the backup file (WinZip will open the file).



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7. Save file to desired location.
8. Right click on the saved file within your computer's file folder and open with Microsoft Access.

*****NOTE:** Winzip may or may not prompt you with an error. However, if the error occurs select OK to continue.

EXTRACTED Tables:

1. What information is extracted?
2. Tbl_Alumni_Details: Table.
3. Tbl_Attendance: Table.
4. Tbl_Demographic_Information: Table.
5. Tbl_Enrolled_Student_Details: Table.
6. Tbl_Lab_Grades: Table.
7. Tbl_Prospect_Ledgers: Table.
8. Tbl_Student_Ledgers: Table.
9. Tbl_Student_Schedules: Table.
10. Tbl_Test_Grades_: Table.

ADMINISTRATION: DOCUMENTS DEFINITIONS

Administration Menu: Documents Definitions

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Documents Definitions.
4. You will automatically be directed to the Existing Document Definitions page.

The Purpose of the Documents Definitions Page

This page can be used for multiple reasons and in multiple departments. You have the ability to go paperless for any documents not requiring a wet signature in a prospect or student's file by uploading all documents to the student profile in OnlineSMART. You now have the ability to work remotely. If you upload prospect or student files on the Documents page you will have access to that information from any internet ready computer and no longer have to worry about misplaced documents. If an auditor visits your school, information can be printed from the prospect's or student's Documents page in OnlineSMART. The Documents Definitions page under Administration is where you can create default names of documents. You may want to keep it limited to those documents required in every prospect's or student's file. Once you create the name of a document it will appear on every prospect's or student's Documents page. This allows you to select the document name from a drop down menu, instead of typing the name. Then you type a description of the document, which is required for uploading, and select which file to upload. This page is very useful if you use any third party servicer. Your third party servicer would utilize this page to aid in the processing of financial aid, verifying documents, auditing files, etc.

Adding a Document Definition

1. A blank line will appear under any previously listed definitions. Enter the name of the document in the first field, such as FAFSA or Driver License.
2. Enter the description in the second field, such as 2013/14 Free Application for Federal Student Aid.
3. Select Save on the right end of the row. Anytime a document definition is added the Date Created column will auto-populate when you select the Save option.

ADMINISTRATION: FEDERAL CASH ACCOUNT

Administration Menu: Federal Cash Account

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Federal Cash Account.
4. You will automatically be directed to the Federal Cash Account page.



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The Purpose of the Federal Cash Account Page

The Federal Cash Account page is for helping the school track funds in their Federal Cash Account. You can enter the net authorized amount for your school for each federal program. Once monies are posted to ledgers the disbursed amount will subtract from the net authorized amount for each program accordingly. The Federal Programs are hardcoded and you cannot add or edit programs. You will only have the ability to edit the net authorized amount (Net Auth) in the second field.

The Processing Year

The Processing Year option offers the ability to keep track of what processing year the information is stored for. Schools will often be handling financial aid for two processing years at a time due to crossover. Be sure to choose the correct processing year when entering and obtaining data on this page. You can choose a different year by selecting the dropdown menu next to processing year and choosing the appropriate year.

Entering the Net Authorized Amount

1. Select Administration from the main menu on the left side of the screen.
2. Select Federal Cash Account.
3. Choose the appropriate processing year by selecting the arrow and choosing a year from the dropdown menu, next to Processing Year.
4. Find the Federal Program you will be entering information for. Select the Edit option located on the right end of the row you are recording data for.
5. Enter the total Net Authorized amount for the program in the second field.
6. Enter the Program Award Number if applicable.
7. Select Update on the right end of the row. Anytime you edit or enter information in this table, the date and time the data was recorded will appear in the fifth field.

Editing the Information for Each Particular Program

To edit information, you will follow the same steps as listed above. Anytime you edit or enter information in this table, the date and time the data was recorded will appear in the Updated column.

ADMINISTRATION: FISCAL YEARS (AWARD YEARS)

Administration Menu: Fiscal Years

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Fiscal Years.
4. You will automatically be directed to the Fiscal Years page.

The Purpose of the Fiscal Years Page

The purpose of the Fiscal Years page is to give each institution the option of prelisting their determined fiscal year and running reports based off the Fiscal Year. When completing your school setup throughout the Administration pages, you have the option to enter what your institution considers their fiscal year. Enter the start and end date of your school's determined fiscal year. If your fiscal year differs from the traditional award year, you may need to temporarily update your fiscal years to mirror the award years for annual reports.

New Fiscal Year Information

1. Enter the Year in the first field.
2. Enter the Abbreviation of the fiscal year in the second. For example: The year is 2009, the abbreviation could be 09.
3. Enter the date you want to begin the fiscal year in the BeginYear column (third field).
4. Enter the date you want to end the fiscal year in the EndYear (fourth field).
5. Check the box Currently Selected if this is the current fiscal year.
6. Select Save on the right side of the row you are entering.



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Choosing the Fiscal Year You Want to Use

Check the box Currently Selected in the row of the fiscal year you wish to use, this makes it the active fiscal year.

Editing a Fiscal Year

1. Select Administration from the menu options to the left of the screen.
2. Select Fiscal Year.
3. Select the Edit option on the right side of the row you wish to change.
4. Enter the most recent data in the related fields.
5. Select the Update option located to the right of the row you are currently editing.

ADMINISTRATION: GUARANTORS

Administration Menu: Guarantors

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Guarantors.
4. You will automatically be directed to the Guarantors page.

The Purpose of the Guarantors Page

The purpose of entering the approved guarantors used at your institution is to have the ability to record this information for each student. This helps you keep track of such information and allows you to easily provide your student with a contact name regarding their student loans. This information is not used anywhere in SMART, it is only for reference material.

New Guarantors Information

1. Enter the Name in the blank box provided.
2. Enter the Description.
3. The date created will automatically populate.
4. Select Save to the right of the row you are entering.

ADMINISTRATION: IMPORT TOOL

Administration Menu: Import Tool

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Import Tool.
4. You will automatically be directed to the Import Tool page.

The Purpose of the Import Tool Page

The Import Tool is primarily designed for the use of schools that are converting their data records from another software solution. However, this tool can also be utilized by current clients to import prospect records. Importing data will not update current records in OnlineSMART; this process will create prospect or student profiles in OnlineSMART based off of the information within the Excel file you import. In order to import data, you will need to download the Excel spreadsheet template designed by SMART for either Prospect or Student records, enter the necessary information into the designated fields, save the file to your computer, and then import the saved file. Some fields within the spreadsheet templates are required and appear highlighted in yellow, the remaining fields are optional. There are Field Legends listed on this page as well as Example Files, both to be used for reference when running the Import Tool. If you are copying records from another data file, check to make sure that when you paste this information into the Import Tool spreadsheet, a "space" has not been added before the information. For example, if the student's last name is "Smith", make sure that when you copy & paste into the Import Tool the result isn't "(space)Smith". If you receive an error message when importing, check to make sure that the record(s) has not imported before you attempt to correct and re-import. Sometimes the record will import the first time, minus the cell with the error. You could get a duplicate student.

Using the Excel Import Template

1. Select the appropriate Import Template; Prospect, Student, or Alumni.



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2. Save the Excel file to your computer.
3. Once you open the saved template, you will see that the required fields are highlighted in yellow. The remaining un-highlighted fields are optional. Each column is designated for specific information. (Do not delete any of the columns. If you are not going to enter information into a particular column, simply leave it blank.)
4. Copy and paste, or manually enter, your prospect, student, or alumni data into the Excel template.
5. If you are importing student records, you will need to add the name of the course they will be assigned to in OnlineSMART to the Excel spreadsheet in the Course column. You must create this course prior to uploading student records. If you upload student records and do not have a course name assigned to a student that coincides with a course in OnlineSMART, you will receive an error message. NOTE: Importing past attendance will result in a single entry of total hours.
6. Save the completed file to your computer.

Importing Data Records

1. From the Import Tool page, select the Type of data that you are importing, Prospect, Student, or Alumni.
2. Select the Browse button.
3. A new window will open allowing you to search your computer for the file that will be imported. Find the appropriate file and select Open.
4. The name of the file you selected will appear in the File field.
5. Select the Run Import button.
6. A message will appear below the Run Import button letting you know that the import is complete and whether there were any errors. If errors occurred during the import process you will be informed of the line numbers the errors derived from within the Excel spreadsheet.

ADMINISTRATION: ISIR ADMINISTRATION

Administration Menu: ISIR Administration

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select ISIR Administration.
4. You will automatically be directed to the ISIR Administration page.

The Purpose of the ISIR Administration Page

The ISIR Administration page allows you to upload your institution's ISIRs into OnlineSMART. Some ISIR information will populate the ISIR tab in the Prospect or Student Profile. Once you have uploaded an ISIR file it will update important verification information on the ISIR tab including an EFC on the ISIR tab. This information will be necessary for annual reports such as IPEDS and FISAPS, etc. You will also be able to print the ISIRs in the imported file from the ISIR Administration page in OnlineSMART. SMART will also create a new prospect profile for any ISIR that is uploaded for a student that is not already in your database.

Uploading an ISIR

1. From the ISIR Administration page, select Upload New in the upper left corner.
2. Select the Browse option next to Select File. (ISIR files must be in one of the following formats in order to upload successfully into SMART: ISRF, IDAP, IDSA, IDRE, IGAA, IGCO, IGSA, or IGSG.)
3. After you select Browse, you will follow the file path to the location in which you upload ISIRs to your computer. Example: If you use Ed Express you can normally find ISIRs in the IAM/Data folder.
4. After you have found the file you wish to import, select the file name. You will now be brought back to the ISIR Administration page of OnlineSMART and your file name will appear in the box next to the Browse option.
5. Select the Upload button located to the right of the screen.
6. Your ISIR file has now been uploaded and you will see the file name, status, and date imported added to the list of previously imported ISIRs. NOTE: If the ISIR file is large, the student name may not appear in the detail box. You will need to select "Run Detail Report" and search by last name.
7. You can print the imported ISIRs by selecting a specific ISIR from the imported list, scrolling down to the "Run Detail Report" button, and selecting it. Once the report generates, select the PDF format and Export then Open or Save and Print.



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Successful Upload of an ISIR

On the ISIR Administration page there will be a log of previously uploaded ISIRs. The log gives you the name of the file uploaded, whether it uploaded successfully, and the date and time it was uploaded. This information will stay in the log unless a user clears the history on this page.

Printing the ISIR

Once the ISIR has been successfully uploaded, you have the ability to print it from OnlineSMART. Select the file you would like to view or print, then select the Run Detail Report button. This will open up the ISIRs that are contained in that file in a new window.

Clearing the History of Files That Have Already Been Uploaded

SMART does not recommend you clear the ISIR history. If you select Clear History in the ISIR Administration page this will clear the list of ISIRs you have uploaded already. Before doing this, make sure you have printed the ISIRs in that list, otherwise you will need to re-upload the ISIR in order to be able to print it again.

Utilizing the ISIR Information

This information will be updated on the ISIR tab under the prospect's or student's profile. The data pulled from the ISIR are as follows: Adjusted Gross Income, US Income Tax Paid, Worksheet A, Worksheet B, Worksheet C, House Hold Size, Number in College, EFC, Grade Level, and a list of the line items previously found on the worksheets (untaxed income).

ADMINISTRATION: LAB DEFINITIONS

Administration Menu: Lab Definitions

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Lab Definitions.
4. You will automatically be directed to the Lab Definitions page.

The Purpose of the Lab Definitions Page

The Lab Definitions page is where you will create all labs that students will complete for all courses available at your institution. Although this may require some data entry work during initial setup, this will save your employees time when entering lab grades for all students. Once lab definitions have been created, a dropdown menu will appear when entering a lab grade which lists all lab names/numbers. This page also helps define the methods used in SMART for calculating a student's GPA. When creating a lab definition, you code the definition either Lab or Major. That information is input in the GPA weighting calculation in Administration: Basic Setup: School Academics tab: Grade Weighting fields under Major Test/Lab and Labs.

Where SMART Utilizes this Information

Lab Definitions will be utilized when entering Lab grades or number completed for a student's profile, either in the Lab Grades or Multiple Lab Grades pages of OnlineSMART. They will also appear in many reports referencing academics.

New Lab Definitions

1. Enter the Lab Number in the blank box provided.
2. Select the appropriate Type for your entry. Example: Lab or Major.
3. Select the appropriate Course for your entry. Example: Cosmetology.
4. If applicable, enter the amount of Credits the Lab is.
5. Enter the number required for the Lab entry. If no number is required and your school gives this student a grade for this Lab, then do not enter anything here, from the student profile you will be able to attach a grade.
6. Enter a Description of this Lab. Example: Disinfection & Sanitation.
7. Select Save to the right of the row you are entering.

Example:



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Lab Number	Type	Course	Credits	Number Required	Description	
1000 Cos	Lab	COSMO P.P.	0	100	DISINFECTION & SANITATION	Edit

Credit hour schools can setup levels and weeks in the Lab Definitions page, i.e. Level 1 Weeks 1-15, Level 2 Weeks 16-30, etc.

*****NOTE: Do not edit labs. Changing this information will affect your current and historical records.**

ADMINISTRATION: LENDERS

Administration Menu: Lenders

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Lenders.
4. You will automatically be directed to the Lenders page.

Purpose of the Lenders Page

The Lenders page is used to create lenders, and later assign them to students' profiles inside of the Contacts tab: Loan Contacts section. If a student is unsure of who their lender is, you can review the Loan Contact section of their profile and provide that information to them quickly.

New Lenders Information

1. Enter the Name in the blank box provided. Example: Direct Loans.
2. Enter the Description. Example: Direct Loans.
3. The Date Created will automatically populate.
4. Select Save to the right of the row you are entering.

ADMINISTRATION: MESSAGING

Administration Menu: Messaging

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Messaging.
4. You will automatically be directed to the Messaging page.

The Purpose of the Messaging Page

This feature was added to give schools the ability to mass text and email prospects, students, and alumni from OnlineSMART. Please NOTE: This feature does not support attachments or pictures, and all messaging is a "do not reply" service.

1. First you will need to select a Prospect or Student profile.
2. On their Personal tab, enter their email address, cell phone number and select their cell phone carrier. Once completed, go to the top of the screen and select Save.
3. Return to the Administration: Messaging page and select Message Type, Student Type, and Filter; then select Search.
4. A list of students will appear who have an email, cell phone number, and a carrier listed. Only prospects/students with numbers and email addresses added will appear.
5. Select the recipients (prospect/students) that you would like to message. (If you would like to message all, check the Select All box at the bottom of the screen. If you would like to message Alumnus, select students and the filter Graduated.)
6. Create the subject and message. Then select Send at the bottom of the screen.

SMART has built a report that will assist schools with their messaging processes. This report can be found in the Reports menu: Standard: Prospect-or-Student-or-Alumni: Messaging Prospect-or-Student-or-Alumni List. Once generated, this report will display all records in the category you selected including Name, Email, Phone Number, and Carrier. This will allow you to review the



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contact information for errors such as an email address being in an incorrect format (Example: tech @smart.net. Having a space present in the address is not proper format). Email addresses that are in an incorrect format will inhibit you from being able to send a mass email message. Additionally, you will need to have a cell phone carrier listed in order to send someone a text message via the Messaging page.

ADMINISTRATION: PREVIOUS SCHOOLS

Administration Menu: Previous Schools

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Previous Schools.
4. You will automatically be directed to the Previous Schools page.

The Purpose of the Previous Schools Page

The Previous Schools page gives your institution the opportunity to store schools and list them in a student profile to track a student's previous school. You can enter high schools or other colleges that students may transfer from. This information is user defined and does not come with any schools pre-made. This information can be useful depending on the type of information you track and your institution's tracking methods.

Utilizing the Information

This information will be utilized and stored on the Personal tab of the student profile. This is not a required field. However, some schools wish to track this information. If you have something selected in the Previous Schools field in a student's profile, it will appear on the General Report only.

ADMINISTRATION: PROGRAMS

Administration Menu: Programs

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Programs.
4. You will automatically be directed to the Programs page.

The Purpose of the Programs Page

The Programs page is where you will enter all programs you wish to use on the ledger. The program will identify the source of monies that are posted to a student ledger. For example: Pell Grant, Direct Subsidized Loan, or PLUS Loan. This is important to many departments of a school, specifically the Financial Aid and Accounting departments. You can run many reports based off of your programs, these reports are often requested by accrediting bodies or other agencies. You may be required to report certain program information to the Department of Education. 1098-T will also pull information based off of Programs used. Some Programs will already be hardcoded into OnlineSMART. These particular programs cannot be edited or deleted by a user, all schools receiving Title IV funds are required to track these specific programs. Since institutions may offer different programs to pay for school, we have built in the option to add other programs. When setting up a program DO NOT select any of the boxes. Please contact a SMART representative before selecting any boxes.

***NOTE: Any monies posted to created Programs will not appear on the 1098-Ts.

Some typical Program additions may include: Over Contract Charge, Late Fee, Unearned Tuition, Student Credit Balance, Cancel/Post AY/PP.

Example:

Program Code	Description	Disbursement Hold	Need Based	Non Cash	Report On 1098	TitleIV	Exclude 1098T	IsActive
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Late Fee	Late Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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New Program

1. From the Programs tab, an empty space will appear at the bottom of any currently listed Programs. In the first field, under Program Code, you will type in a code for the Program. For example: Drop Fee.
2. In the second field, under Description, type in the program description. For example: Student Drop Fee.
3. DO NOT check any of the boxes!
4. Select Save to the right of the row you are working in.
5. The Description will show on the student ledger under the Program dropdown box.

ADMINISTRATION: SCHOOL CALENDAR

Administration Menu: School Calendar

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select School Calendar.
4. You will automatically be directed to the School Calendar page.

The Purpose of the School Calendar Page

The School Calendar is designed to allow an institution to close the schedule out for planned and unplanned closed school days. When closed school days are set in the Calendar, the day will be blocked out on any student schedule. This means a student will not be marked absent on a day your school was scheduled to be closed. These specific days will not count against a student's attendance record. It is important to keep the school calendar up to date prior to creating schedules for your students.

*****NOTE: If you set a school closure date in error, you will need to correct each student's schedule individually or through the Multiple Schedules feature.**

Selecting a Day on the School Calendar to Close

Once you select a day in the School Calendar, it will turn black. This means you are currently able to edit information pertaining to that day. Any changes you make will take effect once you save. Days that are grayed out on the School Calendar are already closed.

Scheduling a Day Off in the School Calendar

1. Select the individual day of the month you wish to edit. If you do not see that month, use the names of the month links on the top right or left side of the calendar until you see the month you need displayed in the middle, then select the day you need to edit.
2. Check both of the check boxes in the bottom right hand corner of the screen stating Clear Day Hours and Clear Night Hours.
3. Next, select the check box No School.
4. Select the check box Special if you would like to make a Note for the day you are closing out. Example: Administration Day.
5. Once complete, go to the top of the screen and select Save.
6. The calendar day should have turned gray and have an information bubble if you made a Note.



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Adding a Date Range of Scheduled Days Off on to the School Calendar

1. From the School Calendar page, select the Close/Open Days button in the bottom right hand corner.
2. Enter the date range you wish to close out.
3. If you uncheck the box No School on this page you will no longer be closing a day. The days of the week field will now say Days to Open.
4. If the No School box is checked, the days of the week field will say Days to Close. Select the applicable days of the week that will be closed during your date range.
5. Select Save. This will bring you back to the School Calendar page and again, you will see the days you selected to close grayed out.

Editing a Scheduled Day Off That Has Already Been Added to the School Calendar

1. Select the day of the month you wish to edit. If you do not see that month, use the names of the month links on the upper right side or left side until you see the month you need displayed in the middle; then select the day you need to edit.
2. If you need to make any changes on the first screen, do so and then select Save in the upper left corner. If you need to go a step further and enter more information, such as a date range, select the Close/Open Days button.

Removing only Day or Night Hours in the School Calendar

1. Select the individual day of the month you wish to edit. If you do not see that month, use the names of the month links on the top right or left side of the calendar until you see the month you need displayed in the middle, then select the day you need to edit.
2. Check the box at the bottom of the screen that says Special.
3. Then check either the Clear Day Hours or Clear Night Hours box in the bottom right hand corner of the screen. For example: If school was open for half the day you would only want to clear the night hours. If school was closed all day you would want to clear both day and night.
4. Once complete, go to the top of the screen and select Save.
5. The calendar day should have turned gray and have an information bubble if you made a note.

ADMINISTRATION: TEST DEFINITIONS

Administration Menu: Test Definitions

1. Log in to OnlineSMART.
2. Select Administration from the main menu on the left side of the screen.
3. Select Test Definitions.
4. You will automatically be directed to the Test Definitions page.

The Purpose of the Test Definitions Page

The Test Definitions page is where you will enter all tests that students will complete for all courses available at your institution. Although this may require some data-entry work in the initial setup, this will save your employees time when entering test grades for all students. Once Test Definitions have been created, they will appear in a dropdown menu format when entering test grades. This page also helps define the methods used in SMART for calculating a student's GPA. When creating a Test Definition, you assign a Type of either Theory or Major. That information is calculated in the GPA weighting calculation in Administration/ Basic Setup/ School Academics/ Grade Weighting box under Major Test and Test.

*****NOTE: Do NOT delete or remove test definitions. If assigned to previous students, there will be a test grade without a classification. If the test definition criteria have changed, SMART recommends creating a NEW test definition as opposed to editing the existing one.**

New Test Definitions

1. Enter the Test Number in the blank box provided.
2. Select the appropriate type for your entry. Example: Theory or Major.
3. Select the appropriate course for your entry. Example: Cosmetology.



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4. Enter the number required for the Theory entry. If no number is required and your school gives this student a grade for this Theory test, then do not enter anything here, from the student profile you will be able to attach a grade.
5. Enter a Description of this theory test. Example: Disinfection & Sanitation.
6. Select Save to the right of the row you are entering.

Example:

Test Number	Type	Course	Credits	Description	
T101	Theory	Cosmetology	0	Chapter 1 Homework	Edit
T102	Major	Cosmetology	0	Chapter 1 Test	Edit



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SECTION 5: PROSPECTS

The Prospects Pages

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.
3. This will show a sub-menu listing of: Financial Aid Worksheet, New Prospect, Profiles, Prospect Documents, and Single Prospect Ledger.
4. Select New Prospect if you are entering a new prospect.
5. Select Profiles if you are searching for an existing prospect's profile.
6. Selecting Financial Aid Worksheet, Prospect Documents, or Single Prospect Ledger will allow you to enter into those pages of the prospect's profile directly. You will be directed to a search engine where you can search by last name, first name, social security number, course, and active status. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
7. This will generate a list of prospects matching your search criteria.
8. Select the prospect's profile you wish to work in. You will be directed to that prospect's profile that includes all of their personal information; from here you can view the Financial Aid Worksheet, Prospect Documents, or Single Prospect Ledger as well.

The Purpose of the Prospects Pages

A prospect is anyone who is interested in attending or receiving information regarding your school. Once you have a point of contact for a prospect, you create a profile for them in OnlineSMART. Once a profile is created, you can track detailed information pertaining to that prospect. After entering a prospect into OnlineSMART, you have the ability to enter comments and notes for a prospective student as well as enter dates for follow-up appointments and projected enrollment. The Personal tab within a prospect's profile is a very important part of OnlineSMART. It is used to enter tuition and other charges, prospect demographics, course information, setup award letters, view ISIRs, etc. You may choose not to utilize all information in this section until a prospect is enrolled. What makes prospective student records so useful is the ability to convert them into an active student record. It is imperative that prospect data is entered as accurately as possible into OnlineSMART because the information you record will be used for a number of things. Some reports are specific to prospect information and if information entered is not accurate, your reports will not reflect accurately. The information you input also affects your schools conversion statistics and lead management. SMART is not liable for incorrect entries.

Adding a New Prospect

1. Select Prospects from the main menu on the left side of the screen.
2. Select New Prospect.
3. Enter full name and phone number of the new prospect.
4. Select Ok to save.

Accessing Existing Prospect Profiles

1. Select Prospects from the main menu on the left side of the screen.
2. Select Profiles.
3. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
4. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
5. This will generate a list of prospects meeting your search criteria.
6. Select the prospect's profile you wish to work in. You will be directed to the Personal tab of that prospect's profile.

PROSPECTS: PROFILES: PERSONAL TAB

The Purpose of the Personal Tab

The Personal tab is used to keep track of prospect basic, contact, and demographic information. This tab is very important. The information located in this tab will be needed on reports for state board and/or accreditation agencies. If entries are not made correctly in this section you will not be able to generate certain annual reports from SMART. SMART is not liable for incorrect entries.



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Basic Information Section

The Basic Information section is the location used to store a prospect's name, address, and social security number. Make sure this information is accurate and up to date. If you input addresses, OnlineSMART has the capability to print mailing labels; this feature is located in the Reports section.

Phone & Email Section

This section allows you to input an email address, and a home, work, and/or cell phone number (with carrier). By entering an email address or cell phone number (with carrier) you will be able to text or email your prospect from OnlineSMART. You can email this prospect individually at the top of the Prospect Details screen or include them in a mass email or text by entering the Administration: Messaging page.

Demographics Section

This section allows the school to store prospect's demographic information needed for various, important reports used for audits, state board, and/or accreditation agencies. It is important that all of these fields are filled out completely and accurately. This section allows you to enter date of birth, race, sex, high school graduation date, referral codes, driver license number, dependency status, residence state, admission representative, marital status, previous school, education level, financial aid type, driver license state, number of dependents, tracking code, and veteran status. Most of the demographic choices have been hardcoded by SMART and cannot be changed. Items such as Referral Codes, Admission Representative, Previous School, and Tracking Codes can be edited in the Administration menu under Codes.

PROSPECTS: FLAGS & NOTES SECTION

The Flags & Notes Sections

When you enter a prospect's profile you have also entered the Flags section, which is displayed to the right of the screen on most pages while working in an OnlineSMART profile. To enter the Notes section, select the tab to the right of the Flags icon.

The Purpose of the Flags & Notes Sections

The purpose of the Flags section in OnlineSMART is to have a quick display of basic prospect information such as name, social security number, prospect ID number, contract hours, enrollment status, appointment date, enrollment date, and initial date. The Notes section allows employees to make basic notes on a prospect and also to set follow-up reminders. These reminders are also listed in the Notifications section, on the right side of the Home screen in SMART. This feature is a great way to track your prospects and also track your Admission Representatives. Also, if there are several staff members working on a prospect at any given time, the Notes field allows them to communicate special circumstances regarding that prospect through Notes. This feature can also be used as a reminder for any work that needs to be done with your prospect. The Notes and Flags for each prospect will show on almost every screen within a profile. This information will carry over when you enroll the prospect and they become a student.

Adding a Note to a Profile

1. Select the icon that looks like a note pad in the upper right corner of the profile page.
2. Select New.
3. Check the Follow Up box if a follow up is required for the specific note you are entering.
4. Enter the date the follow up needs to be performed to the right of the Follow Up option.
5. If you want OnlineSMART to set a reminder for a certain number of days before the follow up is required, enter the number of days in the box between Remind and Days Before Date.
6. Choose who you want the follow up to be performed by. You can do this by selecting either the "Creator only" or "Anyone with" option.
7. Enter the subject of the note in the Subject box.
8. Enter your notes in the empty field shown under the Subject box.
9. Select Add in the bottom left corner of the Notes section.

Viewing Notes from a Profile

1. Select the icon that looks like a note pad in the upper right corner of the profile page.
2. All notes saved for a prospect will be displayed.
3. To view a specific note, select the date of the note you want to read.



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Setting a Note to Show That a Follow Up Is Completed

1. Select the icon that looks like a note pad in the upper right corner of the profile page.
2. All notes saved for a Prospect will be displayed in this section.
3. To update a specific note, select the date of the note you want to update.
4. The note will appear in the same part of the screen where the list of all Notes are displayed.
5. Select the Edit button.
6. Select the check box Follow Up Completed if the follow up is completed.
7. Then enter the initials or code of who completed the follow up and select Update at the bottom of the Notes section.

PROSPECTS: PROFILES: ACADEMICS TAB

Prospects Menu: Profiles: Academics Tab

1. Select Prospects from the main menu on the left side of the screen.
2. Select Profiles.
3. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
4. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
5. This will generate a list of prospects meeting your search criteria.
6. Select the prospect's profile you wish to work in. You will be directed to that prospect's profile.
7. From here, select the Academics tab.

The Purpose of the Academics Tab

The Academics tab also contains very important information. In this tab you can enter the prospect's course, class, initial contact, first contact, and enrollment dates. These fields help track how quickly your school contacts and enrolls a potential student and also builds your prospect's profile by documenting what course the prospect is interested in.

Program Information Section

The options listed in the Course dropdown box are created in the Administration menu under Course. If you have already created your courses, you will have the option to select a course for this prospect. This will automatically populate information such as Contract Amount, Hours/Credits, and also update the next tab, Financial. The Class section is hardcoded by SMART and your choice of options cannot be edited. Your options are Day or Night. The Permit Number is created by SMART once you create a new prospect and is specific to each individual student. This number will appear on reports and will be the number given to various agencies your school may work with. The Permit Number will also be used for SMART's Biometric time clock. This Permit Number is extremely important and should not be deleted. If this number is left blank, this can cause a discrepancy if you have the SMART Biometric time clock.

Dates Section

The Initial Contact date is automatically created when you enter a new prospect. You may edit this date if it is not correct. This section also gives you a First Contact and Enrollment box; the dates that are input here coincide with tickler reports. Please NOTE: Once you enroll this prospect and they become a student these items will not be able to be edited. The Is Active check box allows you to make a prospect profile active or inactive. Example: If a prospect does not enroll in the class they originally selected, you can make the prospect inactive instead of deleting their profile. This will save time when it comes to data entry because if the prospect returns you can make their profile active again instead of having to create a new record. NOTE: Please make sure to mark a previously Inactive prospect Active prior to enrolling her as a student. Otherwise, the student will not show as Active.

Appointments Section

The Appointments section allows you to keep track of important dates or appointments which you set with prospects. These dates can then be queried in a report. For example: If you wanted a list of prospect names and contact info for only those prospects that have an appointment on a certain date you could query a Messaging Prospect List for the date and only those prospects would appear on the list.



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PROSPECTS: PROFILES: FINANCIAL TAB

Prospects Menu: Profiles: Financial Tab

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects meeting your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's profile.
8. From here, select the Financial tab.

The Purpose of the Financial Tab

The Financial tab is used to keep track of a prospect's contract information. Once a course is selected, the Enrollment Period, Tuition, Fees, Books/Kits, Other, Maintenance, Contract Dollars, and Contract Hours will populate in this section. This information can also be edited on this tab.

Prospect Contract

The Prospect Contract table is automatically created once a course is selected for a prospect. All of the fields are configured when you develop your courses in the Administration pages. Each line entry represents an enrollment period and the cost and contract hours associated with that enrollment period. Again, verify with your school Administrator if you process financial aid by payment period, academic year, or full upfront payment. This section will have different entries for each process. SMART is not liable for incorrect entries. The Tuition column is where you will enter/edit the tuition amount. The Fees column lists your enrollment, registration, or application fee. The Books/Kits column lists the cost of your books and/or kit. The Other column is for any other type of charge that is not already listed. The Contract Dollars column is for the total amount of the contract; SMART will generate this number by calculating the totals of the other boxes. The Contract Hours column lists the amount of hours the student is contracted for.

Updating Contract Information on the Financial Tab

1. You must have a Course selected in the Academics tab for the Financial tab to auto-populate.
2. Select the Edit button to the right of the row you are editing.
3. Edit the information and select Update.
4. Please realize that by editing this information will update the ledger and change your contract balance for this prospect.

PROSPECTS: PROFILE: ISIR TAB (Institutional Student Information Report)

The ISIR Tab

This tab will allow you to view information that has been imported from an ISIR. It will not reflect any information based off the ISIR if you do not have your school's ISIR uploaded into OnlineSMART. See the Administration menu: ISIR Administration to upload ISIR files.

PROSPECTS: PROFILE: P-ISIR TAB (Dependent Student)

The P-ISIR Tab

This tab allows you to view the main information on a Parent ISIR. It will reflect the amounts that are in the Parent section on the ISIR. It will not reflect any information based off the ISIR if you do not have your school's ISIR uploaded into OnlineSMART. See the Administration menu: ISIR Administration, to upload ISIR files.



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PROSPECTS: PROFILE: ADMISSION TESTS TAB

Prospects Menu: Profiles: Admission Tests Tab

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects matching your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's profile.
8. From here, select the Admission Tests tab.

The Purpose of the Admission Tests Tab

The Admission Tests tab is a place to record an admissions test should one be required for enrollment. Some institutions require an admissions test be taken prior to being approved for enrollment. You may also use this section to keep track of any ATB (Ability to Benefit) Tests. The list of options in the drop down menu under the Code Name column is created in the Administration menu: under the Codes page.

Adding an Admissions Test to a Prospect Profile

1. From the prospect's Admission Tests tab, select the admissions test from the Code Name dropdown menu.
2. Enter the Test Date.
3. Enter the prospect's Score.
4. Enter the Location, if applicable.
5. Select the Save button to the right of the row you are entering.

PROSPECTS: PROSPECT DOCUMENTS

Prospects Menu: Prospect Documents

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects matching your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's profile.
8. From here, select Documents from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.
3. Select the Prospect Documents.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects matching your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's Documents page.



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The Purpose of the Documents Page

Having the ability to upload documents into OnlineSMART is an exciting feature that has many benefits. Uploading documents can alleviate having to physically pull a prospect's file. It allows a school to go "Green" as well as protect documents in case of a fire, theft, or disaster that may occur at the school. Additionally, if you are working in OnlineSMART, but you are not at the school where files are accessible, you can view any documents that you have uploaded to a prospect's profile in OnlineSMART. All documents are backed up at a remote, secure offsite location. Please NOTE: The maximum document size that you can upload is 30MB.

Uploading Documents into a Prospect's Profile

1. To upload documents into OnlineSMART, you will first scan the document and save it to your computer.
2. Then, from the prospect's profile, select Documents from the top menu.
3. Select New.
4. Type in a Name for the document (i.e. FAFSA, Driver License, etc) or select it from the dropdown in Recommended Type. The options in this dropdown are created in the Administration menu: under the Documents Definitions page.
5. Type in the Description of the document (i.e. Copy of FAFSA, Copy of driver license).
6. Now, select the Browse button to find the file on your computer you wish to upload. Once you have selected the file, select the Save button.

Viewing and Deleting Documents from the Prospect's Profile

1. From a prospect's profile, select Documents from the top menu. Otherwise, select Prospects from the main menu on the left side of the screen, then select Prospect Documents.
2. To *View* the document, select Get to the right of the name of the document you want to view and/or print.
3. A new window will appear asking if you want to Open or Save the document, choose whichever applies.
4. To *Delete* the document, select Delete to the right of the name of the document you want to delete.
5. A new window will appear asking if you want to delete this record, select OK or Cancel.

PROSPECTS: FINANCIAL AID WORKSHEET (Fin Aid)

Prospects Menu: Financial Aid Worksheet

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects meeting your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's profile.
8. From here, select Fin Aid from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.
3. Select Financial Aid Worksheet.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects matching your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's Financial Aid Worksheet (Fin Aid).



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The Purpose of the Financial Aid Worksheet

In the Financial Aid Worksheet you will enter a prospect's financial aid awards. Once awards have been entered for the different payment periods, you will have the ability to print an award letter. The Financial Aid Worksheet should be completed before funds are posted to the student's ledger.

Entering Current Awards in the Financial Aid Worksheet or Subsequent Award Years

1. Choose the year from the Year dropdown.
*** Choose the later year in the current award year. For example: for fiscal year 2015/2016, you would use 2016 for the year.
2. Check the appropriate flags that apply to the student. (Please see below for flag information.)
3. When the Financial Aid Worksheet loads, a blank row will automatically appear on the screen to enter the student's first award. Every time you save an entry, a new blank row will appear underneath.
4. Select the program from the Program dropdown box in the blank row. Choose the name of the award you are entering i.e. Pell, FSEOG, FDLPS. Use Grants, Scholarships, or Agencies as the program code for other grants, Voc Rehab, Tribal Grants, etc. SMART offers a variety of programs to more specifically fit schools' needs for funding options such as Grants (choose LG Grant or S grant), Scholarships (choose Inst Scholarship, LG Scholarship, or S Scholarship), and Institutional Finance Plans (choose IFP or IolFP). [It is the school's option to enter Veterans Education Benefits (VEB) on this tab. Info for 1098Ts will be pulled from student ledgers].
5. Select the enrollment/pay period from the dropdown box under Enrollment/Pay Period. Your enrollment or pay periods will be listed in this area upon assigning a course to a prospect's profile. (To learn more about adding pay periods, please see the Administration menu: under the Course page.)
6. Enter the anticipated disbursement date in the Award Date field.
7. Enter the award amount in the Award field.
8. Enter the fees amount in the Loan Fees field.
9. The Disbursed and Remaining fields will auto-populate. Once part of an award has been disbursed in the ledger, the amount received will show in the Disbursed field, and the remaining amount to be disbursed will show in the Remaining field.
10. **IMPORTANT NOTE: Remember that the pay period assigned when setting up the award must match the pay period that is assigned to the posting on the ledger. If these two pay periods do not match, along with the year, and the program, you will not see the Disbursed and Remaining fields update from disbursements that are posted to the ledger. The year and program must also match.**
11. Check the box under Need Based if the specific award you are entering is need based.
12. Once you are finished recording your information, select the Save button to the right of the row you are entering.

Editing an Award Already Setup in the Financial Aid Worksheet

1. Find the row that contains the award you wish to edit and select the Edit button to the right of the row.
2. Edit or update the existing information to reflect the current information.
3. Select Update to the right of the row you are editing; this will save the data you just entered.

The Title IV Eligible Box

The Title IV Eligible box is very important. You must check this box for each student who is Title IV eligible. This is one of the flags that will always appear on the right side of most screens. This allows the person who will be posting Title IV disbursements to know this prospect is eligible for Title IV. To remove the flag you simply uncheck the box and save. If you do not check the Title IV eligible box, when someone is posting to the ledger they will not see any Title IV programs listed in the program dropdown menu. Title IV will not be available to be posted to the ledger until the flag is checked in the Financial Aid Worksheet section of OnlineSMART. The flag will appear in the Flags section that is displayed vertically on the right side of the screen in the prospect's or student's profile.

The Need NSLDS Box

Another very important flag is the Need NSLDS. You can check this box and it will allow any person looking at the student in OnlineSMART to see that they still need to run NSLDS. If you need NSLDS on a student, check the box and select Save; this



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will automatically set the flag. To remove the flag, uncheck the box and save. The flag will appear in the Flags section that is displayed vertically on the right side of the screen in the student profile.

The In Default Box

The purpose of the In Default box is to prevent any posting that a student may not be eligible for due to their default status on a federal student loan. When you discover a student is in default, check this box and select Save. This is also a useful tool to remind you to monitor a student who had a prior default and is on the six consecutive payment plans with the DOE. When the student is no longer in default, uncheck the box and select Save to remove the flag. The flag will appear in the Flags section that is displayed vertically on the right side of the screen in the student profile.

The Estimated Family Contribution (EFC)

The EFC displays in the ISIR tab when the ISIR has been imported.

*****NOTE: If you do not upload ISIRs, the EFC will not display in OnlineSMART.**

Need Based / Non-Need Based Award Types

When you are setting up awards in the Financial Aid Worksheet of OnlineSMART, you have the ability to check the box if the award is need based. Examples of need based aid would be Pell Grant, FSEOG, and Subsidized Loan. When assigning a student your school's determined need based aid, be sure to check the Need Based box. If you are setting up your school's determined NON-need based aid, you simply leave the Need Based box unchecked.

Award Letter

The Award Letter is used to advise the student of their estimated financial aid awards. The amount of aid that displays on the award letter printout will come from the aid that is setup on the Financial Aid Worksheet. The Award Letter in OnlineSMART contains authorization for the following: crediting a student's account, information specific to awards that include loans, a notice to notify the financial aid office in the event of award or circumstance changes, information on how aid will be disbursed, and notice to remain in satisfactory academic progress. The Award Letter also advises that a change in enrollment status may affect awards, that awards are for current year only, and gives the notice of right to cancel. By having the student sign this document, you eliminate several additional forms because of the notifications that are included on the Award Letter.

Printing an Award Letter

1. To print an award letter you must be on the student's Financial Aid Worksheet.
2. From here, select the print option in the menu at the top of this screen.
3. Select the Prospect/Student Financial Aid Award Notice option in the Report List box that appears.
4. Enter the award year of the award letter you wish to print. For example: 08/09 would be 2009.
5. Select the View Report button located in the upper right corner of this page.
6. To print the report, select a format to export the report to by selecting the blue export button located in the header of this page. A standard format to print in would be PDF.
7. A pop up box will appear that gives you the option to open or save. If you want to print, but not save, this award letter to your desktop, select Open. If you need to save this award letter before you print, select Save and you will have the option of choosing a location to save your award letter to on your computer.
8. Once the PDF file loads, select the print option at the top left side of the page.

Verification

Choose an option in the dropdown box next to Verification. The options are: Not Required, Accurate, Reprocessed, Tolerance, W/O Documentation, and Selected, Not Verif.

PROSPECTS: SINGLE PROSPECT LEDGER

Prospects Menu: Single Prospect Ledger

1. Log in to OnlineSMART.
2. Select Prospects from the main menu on the left side of the screen.



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3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects matching your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's profile.
9. From here, select Ledger from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Ledgers from the main menu on the left side of the screen.
3. Select Single Prospect Ledger.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your prospect or prospects, select the Search button.
6. This will generate a list of prospects matching your search criteria.
7. Select the prospect's profile you wish to work in. You will be directed to that prospect's Ledger page.

The Purpose of the Single Prospect Ledger

The Prospect Ledger is where you will post any type of payment received prior to the prospect becoming an active student. Once the prospect enrolls and becomes an active student, you will go to Single Student Ledger to view or post payments, disbursements, etc. The ledger is a very important tracking system in OnlineSMART, especially if you are a Title IV eligible school. The ledger is a centralized location to track payments, balances, Title IV, and other monies that pertain to a student's account. For prospect records you will have the ability to take an enrollment fee, track the payment, and print a receipt for the prospect. *******NOTE: The Ledger page will be covered in-depth in the Student Ledger section of this manual. Type Codes and Allocation are crucial to how information is directed throughout SMART. We cover a basic enrollment fee entry here, please be aware that Type Code and Allocations must be understood before selecting. SMART is not liable for incorrect entries.**

Posting a New Ledger Entry

1. Select New at the top of the screen.
2. Disbursement Date and Post Date: These two dates could be the same and/or they may be different. If they are different (in two different months) it could affect your earned unearned tuition. The Disbursement Date is the date the item was disbursed or deposited. The Post Date is the date the item was actually posted. It is preferable to have these two dates be the same. These dates cannot be changed once they have been saved, so be sure it is correct the first time. There should be no backdating. Communicate with your institution's financial advisor regarding the rules and regulations of the standards and procedures for Disbursement Date and Post Date. SMART is not liable for incorrect entries.
3. Select Type: CASH or CARD- CASH Type Code is used for cash, money orders, checks, agencies, scholarships, state grants, Sallie Mae Career Training loans, and other alternative loans. CARD Type Code is used for credit card payments only. (Please remember we are only covering a basic cash or credit card enrollment fee in a prospect's profile.)
4. Enter the Check Number if applicable. Otherwise, you can use this box for basic notes if needed. Example: type Enrollment Fee.
5. Enter the Amount the prospect has paid.
6. Program box does not apply to the Prospect section so leave that blank.
7. Select the Appropriate year. (Cash payments are posted in calendar year, not award year.)
8. Allocate the funds to the correct area. For this posting, it will be posted to Fees.
9. Once complete, select Save at the top of the screen. The system will ask if you are sure you want to add this ledger entry. Confirm the information and select Yes if you want to add; select No if you need to edit any information.



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Editing an Existing Ledger Entry

1. **IMPORTANT:** Allow Ledger Editing must be enabled in order to edit ledger entries. To activate ledger editing please go to Administration: Basic Setup: School Features and on the top of the right column, check Allow Ledger Editing, select Save.
2. From the main Ledger screen select Edit on the right side of the entry you wish to edit.
3. This will bring you back into the ledger post and you will be able to edit all information except for Disbursement Date and Post Date.

Printing a Receipt or Report for this Entry

1. Once you have saved the entry, the system will bring you back to the main ledger screen. From here, you can select the paper icon to the left of the entries.
2. Once you select the paper icon, the system will generate a receipt.
3. To print the receipt, select a format to export the receipt to by selecting the blue export button located in the header of this page. A standard format to print in would be PDF.
4. Once you have made your selection, a pop-up window will prompt you to Open or Save the receipt. Select Save if you want to save this file on your computer. Select Open if you want to print.

The Recalculate Option

The Recalculate option is present in the top tool bar within OnlineSMART. When you select this option, it prompts the ledger to recalculate. Normally you will not need to use this option, but if something has been recently posted to the ledger and the balance has not changed, select Recalculate and this will force the system to recalculate.

Closing a Ledger

Closing the ledger will prohibit any more postings to the ledger. You would only choose to close the ledger when there is a zero balance, you do not anticipate any more monies coming in on this prospect, and do not want any other items to be posted to the ledger. You may also choose to temporarily close a ledger; as it is very easy to reopen. This is not a required tool to use in OnlineSMART, however, it's there in the event a user wishes to close a ledger for a short, or extended, period of time. The user will decide when to open or close a ledger.

1. From the prospect's ledger, select the Close option from the menu across the top of the screen.
2. Once you have closed the ledger, instead of seeing the word Close, you will now see the option to Reopen. If you ever see the Reopen option present in a prospect's ledger, this is your indication the ledger has been closed and no other posting will be allowed until the ledger has been reopened.

Re-Opening a Closed Ledger

1. From a prospect's ledger, select the Reopen option from the menu across the top of the screen.
2. Once you have reopened the ledger, instead of seeing the word Reopen, you will now see the option to Close. If you ever see the Close option present in a prospect's ledger, this is your indication the ledger is opened and posting is possible until the ledger has been closed.

PROSPECTS: ENROLLING A PROSPECT TO A STUDENT

Enrolling a Prospect to Become a Student

1. From a prospect's profile, in the prospect's Details section, select the Enroll button located at the top of the screen. This button will be grayed out if you do not have the prospect's name, phone number, social security, and a course selected. Once these items have been added to the prospect's profile, the Enroll button will be available.
2. After selecting the Enroll button the Enrolling Prospect section appears. Select Enrollment Type, Class, Length, and Contract Grad Date for this prospect who is becoming a student. The Hours Per Credit, Max Credits Per Period, and Credit Period only apply to Credit Hours school. Most schools will not have an input for those boxes.
3. Once completed, select the Save button in the center of your screen. Do not select the Save button located at the top of the screen.



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SECTION 6: STUDENTS

The Students Pages

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. This will populate a new list of menu options: Attendance, Documents, Financial Aid Worksheet, Grades, Lab Grades, Leave of Absence, Multiple Lab Grades, Multiple Schedules, Multiple Student Attendance, Multiple Test Grades, Profiles, R2T4 Calculation, Single Student Ledger, and Student Schedule.
4. Select Profiles to enter a student's profile.
5. Selecting Attendance, Documents, Financial Aid Worksheet, Grades, Lab Grades, Leave of Absence, R2T4 Calculation, Single Student Ledger, or Student Schedule will direct you to that specific page of the student's profile. Once you have selected one of these options you will be directed to a search engine where you can search by last name, first name, social security number, course, and enrollment status. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile Personal tab or Attendance, Documents, Financial Aid Worksheet, Grades, Lab Grades, Leave of Absence, R2T4 Calculation, Ledger, or Schedule page, depending on your selection above.

The Purpose of the Students Pages

The purpose of the Students pages is to keep track of all student information in an organized manner. In these you will have the capability to view and update attendance, store and view your uploaded documents, compile a student's financial aid worksheet, enter and view grades, record a leave of absence, access student profile information, perform R2T4 refund calculations, view and post to a single student ledger, and view and compile the student schedule. You can also set any flags (reminders), and store any notes in OnlineSMART that pertain to a specific student. The intention of the Students pages in OnlineSMART is to make your daily operations user friendly and functional. We have designed the Students pages so that you can easily navigate through it; each category is readily available from the main menu on the left hand side of the screen. Anything you need in this section is just a few clicks away. It is imperative to accurately enter student information into OnlineSMART because the information you record will be used for a number of reports and other tasks. Many reports rely on the student information and if the information is not correct, your reports will not reflect accurately. SMART is not liable for incorrect entries.

STUDENTS: PROFILES: PERSONAL TAB

Students Menu: Profiles: Personal Tab

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile into the Personal tab.

The Purpose of the Personal Tab

The Personal tab is used to keep track of all student basic, contact, and demographic information. This tab is very important; information on this screen will be needed on reports for state board and/or accreditation agencies. If entries are not made correctly to this section you will not be able to generate certain annual reports from SMART. SMART is not liable for incorrect entries.



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Basic Information Section

The Basic Information section is the location used to store a student's name, address, and social security number. Make sure this information is accurate and up to date. If you input the addresses, OnlineSMART has the capability to print mailing labels; this feature is located in the Reports menu.

Phone & Email Section

This section allows you to input an email address, home, work, and cell phone number (with carrier). By entering this information you will be able to text or email your student from OnlineSMART. You can email this student individually from the top of the Student Details screen or include them in a mass email or text by entering the Administration menu: Messaging page.

Demographics Section

This section allows the school to store student's demographic information needed for various important reports used for audits, state board, and/ or accreditation agencies. It is important that all these fields are filled out completely and accurately. This section allows you to enter date of birth, race, sex, high school graduation date, referral codes, driver license number, dependency status, residence state, admissions representative, marital status, previous school, education level, financial aid type, driver license state, number of dependents, tracking code, and veteran status. Most of the demographic choices have been hardcoded by SMART and cannot be changed. Items such as Referral Codes, Admission Representative, Previous School, and Tracking Codes can be edited in the Administration menu.

STUDENTS: FLAGS, NOTES, AND DETAILS SECTIONS

Flags, Notes, and Details Sections

When you enter a student's profile, you have also entered the Flags section, which is displayed to the right of the screen in most tabs while working in a SMART profile. To enter the Notes and Details sections, please select the corresponding tab to the right of the Flags information icon.

The Purpose of the Flags, Notes, and Details Sections

The purpose of the Flags, Notes, and Details sections in OnlineSMART is to have a quick display of basic student information such as basic information, various academic and financial flags, and important dates. The Notes section allows employees to make notes on a student and to set a Follow Up date. On the date of the Follow Up, the student will be listed on the Personal Follow-Up page located on the right side of the Home screen under Notifications: Tickler Reports: Personal Follow-ups. You can set the number days before the Follow Up date that this student will post to the Personal Follow-ups page by inputting the number in the Remind DAYS Before Date field. This feature is a great way to track your students and also track your admissions representatives. Also, if there are several staff members working on a student at any given time, the Notes field allows them to communicate special circumstances regarding that student. This feature can also be used as a reminder for any work that needs to be done with your student. The Notes and Flags for each student will show on almost every screen.

Adding a Note to a Student's Profile

1. Select the icon that looks like a note pad in the upper right corner of the profile page.
2. Select New.
3. Check the Follow Up box if a follow up is required for the specific note you are entering.
4. Enter the date the follow up needs to be performed to the right of the Follow Up option.
5. If you want OnlineSMART to set a reminder for a certain number of days before the follow up is required, enter the number of days in the box between Remind and Days Before Date.
6. Choose who you want the follow up to be performed by. You do this by selecting either the Creator Only or Anyone option.
7. Enter the subject of the note in the Subject box.
8. Enter your notes in the empty field shown under the Subject box.
9. Select Add in the bottom left corner of the Notes section.

Viewing Notes from a Profile

1. Select the icon that looks like a note pad in the upper right corner of the profile page.
2. All notes saved for a student will be displayed.
3. To view a specific note set, select the date of the note you want to read.



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Setting a Note to Show that a Follow Up is Complete

1. Select the icon that looks like a note pad in the upper right corner of the profile page.
2. All notes saved for a student will be displayed in this section.
3. To update a specific note, select the date of the note you want to update.
4. The note will appear in the Notes section.
5. Select the Edit button.
6. Select the check box Follow Up Completed if the follow up is completed.
7. Then enter the initials or code of who completed the follow up and select Update at the bottom of the Notes section.

Viewing the Details Section from a Student's Profile

1. Select the icon that looks like either a clipboard or a red X, located in the Information and Notes section in the upper right corner.
2. All details set for a student will be displayed.

STUDENTS: STUDENT SCHEDULE

Students Menu: Student Schedule

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select Schedule from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Student Schedule.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Schedule page.

The Purpose of the Student Schedule Page

The Student Schedule plays a very important part in the functionality and tracking of OnlineSMART. The schedule is used for many different things. For example: Keeping track of scheduled vs. actual hours, progress, and tracking absences. If a student's schedule changes it is important to edit the schedule within their profile. To ensure accuracy in students' schedules, it is important that the School Calendar is in place before students' schedules are created. SMART is not liable for incorrect entries.

Setup of a Student Schedule

You have three options in this area. You can build a template to automatically populate the Day fields and/or the Night fields. This template will appear in the dropdown options in all of your students' schedule tabs. You may also manually enter the Day or Night hours yourself by entering information in the correct fields that apply to the student's schedule. Creating a Template will save time in entering your students' schedules; however, some schools have an odd schedule, like a rotating day. In this case, you will want to utilize the Rotating Schedule template option. An example of this type of situation would be that students attend classes every other Saturday at your school.



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Creating a Schedule Template

1. Select Schedule from the top menu in a student's profile.
2. Select the Insert Schedule Date button located in the bottom right corner of the screen.
3. Enter the number of hours the student will attend each day in the Day Hours fields or Night Hours fields.
4. Enter the title of the template you are saving. For example: Full Time or Part Time.
5. Select the Save Template button at the bottom of the schedule section on this screen.

Creating a Rotating Schedule Template

1. From any student's profile, select Schedule from the top menu.
2. Select the Insert Schedule Date button located in the bottom right corner of the screen.
3. This will bring you to a screen where you can create a schedule template. In the upper right hand corner, check the box that says rotating schedule.
4. The template will now generate a second week for both the Day and Night Hour fields.
5. Enter the number of hours the student will attend each day for week one and then week two, in the Day Hours fields or Night Hours fields.
6. Enter the title of the template you are saving. For example: Rotating FT Cos.
7. Select the Save Template button at the bottom of the schedule section on this screen.

Inputting a Schedule Using a Saved Template

1. Select Schedule from the top menu in a student's profile.
2. Select the Insert Schedule Date button located in the bottom right corner of the screen.
3. Choose a saved template from the dropdown menu under Load Template. The information that was saved when creating the template will auto-populate in the appropriate fields.
4. In the Start Date field, enter the day the student's schedule begins.
5. In the End Date field, enter the max time frame date.
6. Select the Insert Range option in the upper left corner of the screen.

Assigning Multiple Student Schedules

OnlineSMART is formatted to allow multiple student schedules to be assigned at once. This feature makes it possible to assign groups of students to a schedule at the same time using a custom schedule template that you have previously created. For example: If your school has a new class of twenty students starting, you can use the Multiple Schedules section to apply a custom schedule template for all of them from one screen.

1. Select Students from the main menu on the left side of the screen.
2. Select Multiple Schedules.
3. If you will be assigning all students that you are entering at this time to the same schedule, select that schedule template from the Defaults dropdown menu.
4. If all students you are entering will have the same start date, enter that start date in the second default box.
5. If all students you are entering will have the same end date, enter that end date in the third default box.
6. In the Name field, enter the first few letters of the student's last name. A dropdown box will appear with a list of all active students whose last names begin with the first few letters you entered.
7. Select the student you wish to assign this schedule template to from the dropdown box. This student's full name and permit number will now auto-populate.
8. Tab past the Permit Number field.
9. If you have not already selected a default template, select the schedule template you wish to assign this student from the Template dropdown.
10. Tab to the Start Date field; if you have not already entered a default start date, enter this student's start date here.
11. Tab to the End Date field; if you have not already entered a default end date, enter this student's end date here.
12. Tab again to move to the next line.
13. Repeat these steps on the same screen for all students that you are assigning a schedule template to.
14. Once you are finished, select Save from the top menu of the screen.



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Manually Entering Information in the Insert Schedule Date Page

1. Select the Insert Schedule Date button located in the bottom right corner of the screen.
2. Enter day hours using the top portion, or if you are entering night hours, use the bottom portion.
3. Enter the number of hours the student will attend each day in the Day Hours fields or Night Hours fields.
4. In the Start Date field, enter the day the student's course begins.
5. In the End Date field, enter the max time frame date.
6. Select Insert Range in the upper left corner of the screen.

Adding or Editing a Student Schedule for a Schedule Change

There are two ways you can edit a student schedule:

1. From the Student's Schedule page, edit the hours in the Calendar section to reflect the changes.
2. Select Save at the top of the screen.

OR

1. Select the Insert Schedule Date button located in the bottom right corner of the screen.
2. Enter day hours using the top portion, or if you are entering night hours, use the bottom portion.
3. Enter the number of hours the student will attend each day in the Day Hours fields or Night Hours fields.
4. In the Start Date field, enter the day the student's course begins.
5. In the End Date field, enter the max time frame.
6. Select the Insert Range option in the upper left corner of the screen.
7. **IMPORTANT:** If the new graduation date is earlier than what was originally scheduled, you will need to remove any remaining scheduled days that are passed the revised graduation date.

Deleting Days Out of the Schedule

There are two ways you can delete a student schedule:

1. From the Student's Schedule page, edit the hours in the Calendar section by entering zeroes where the student has hours.
2. Select Save at the top of the screen.

OR

1. Select the Insert Schedule Date button located in the bottom right corner of the screen.
2. Remove day hours using the top portion, or if you are removing night hours, use the bottom portion.
3. Enter zeroes for hours in the Day Hours fields or Night Hours fields.
4. In the Start Date and End Date fields, enter the date range you wish to remove from the student's schedule.
5. Select the Insert Range option in the upper left corner of the screen.

Deleting Days Out of the Schedule for an Emergency School Closure

Go to the School Calendar section located under Administration and select the day you would like to close. It does not matter if the day has already passed, you can still close it and remove the scheduled hours from each student's schedule. From the School Calendar section you have the ability to close Day Hours or Night Hours and/or the Full Day. Please see the Administration: School Calendar section of this manual for more information. By doing this edit you will remove the day from the student's schedule but if they have clocked in from our SMART time clock you may want to adjust each Student's hours in their Attendance section. Also, if you close a day on the school's calendar in error (the wrong date), you will need to edit each student's schedule individually.

******NOTE: SMART recommends scheduling students out to Max Time Frame. A guideline chart is provided on page 79.**



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STUDENTS: PROFILES: ACADEMICS TAB

Students Menu: Profiles: Academics Tab

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select the Academics tab.

The Purpose of the Academics Tab

The purpose of the Academics tab is to store academic information in a centralized, easily accessible location. This tab is designed to store academic details such as program information, important dates, drop and reenroll history, enrollment type, and transfer hours.

Program Information Section

This section houses student assigned course information; assigned course is determined when you enroll a student. The Course dropdown choices are created in the Administration menu: under the Course page. When you assign a course, the information pertaining to that course will auto populate into this tab (as well as the Financial tab) such as Contract Amount, Hours/Credits, and Schedule length. You can change the student's course if they have decided to enroll in a different course by selecting from the dropdown menu and choosing a new course. Once a new course has been chosen, a new window will open prompting you to authorize the course change. After you select Ok, the page will reload and the new course data will auto populate. The Class section is hardcoded by SMART and the selections cannot be edited; your selections are Day or Night. The Permit Number is created by SMART when you create a new prospect and is unique for each student. This number will appear on reports that will be given to various agencies your school may work with and is also used for tracking in SMART's Biometric time clock. The permit number is extremely important and should not be changed. If this number is changed, you risk accidentally creating duplicate profiles in OnlineSMART and in the time clock software SMARTTime. When you create duplicate records you may not be able to locate a record you have already entered. SMART's recommendation is to not change this number! SMART is not liable for incorrect entries.

Dates Section

The Initial Contact, First Contact, and Enrollment dates are created when you enter a new prospect. Please NOTE: Once you enroll a prospect into a student, these items cannot be edited. The Original Start date is created when you enroll a prospect into a student. Please NOTE: If you are entering an existing student this date will need to be changed. The Original Start date is the date the student was supposed to start. The Start Date and Original Start date are often the same. Having both of these dates the same will ensure that the calculations on some reports are accurate.

Entering a Date in the Dates Section

1. Input the date you are entering in the designated field.
2. Select the Save button in the upper left corner of the page.

IMPORTANT: Initial Contact date is automatically set when a prospect is added to OnlineSMART. Initial Contact, First Contact, and Enrollment dates cannot be changed in a student's profile and can only be changed in a prospect's profile.

Entering an Appointment in the Appointments Section

1. Enter a description of the appointment in the Description field.
2. Enter a date for the appointment.
3. Enter an action in the Action field.
4. Enter a result in the Result field.
5. Select the Save button to the right of the row you are entering.



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Drop and Reenroll History Section

The Drop and Reenroll History section of the Academics tab lists any history of a student dropping or reenrolling. You will see the drop or reenroll date in the field to the far left. If it was a student drop, the date the drop was determined should be entered in the next field. Reenroll or Drop will appear in the following field depending on the student's situation. The last field will display the drop code if applicable.

Dropping a Student

1. In the Drop and Reenroll History section, enter the drop date and determination date in the fields provided. The first field is for the student's last physical date of attendance; the second is for the date it was determined that the student would be dropped. These two dates should generally not be more than 14 days apart, per Federal regulations. The exception to this would be if the student did not return from a leave of absence; in this case these dates could be separated by the maximum number of days the school allows in its LOA Policy. It is important to enter both the drop date (last date of attendance) as well as the determined date.
2. Choose the drop code. (These are hardcoded by SMART; more codes can be added by an authorized user in Administration: Codes: Drop Codes tab.)
3. Select the Drop button.
4. Once you drop a student SMART recommends deleting the schedule after the student's last date of attendance.

Deleting a Drop if you Accidentally Dropped a Student

1. From the Drop and Reenroll History section, select the Delete option to the right of the drop you wish to delete.
2. A new window will open prompting you to authorize the deletion, select Ok. The student will be returned to active status.

Reenrolling a Student Who has Been Dropped

1. Any time a student returns to complete a program/course that they previously dropped from, they are a reenroll student.
2. From the Drop and Reenroll History section, enter the Reenroll date in the blank field to the left of Reenroll.
3. Select the Reenroll button. Do NOT change either the Original Start Date or the Start Date in the Dates section of the Academics tab.
4. The student is now reenrolled and will return to active status. (Please NOTE: The Reenroll button will not appear until a drop has been entered for the student.)
5. Starting with the reenrollment date, schedule the student back out to max time frame.

*****NOTE: SMART offers schools the ability to track 2 separate drops & reenrolls for any single student. We do not recommend that schools reenroll students more than twice.**

Attendance and Enrollment Information Section

The Attendance and Enrollment Information section on the Academics tab contains important information on Enrollment Type, Transfer Code, Transfer Hours, Transfer Credits, and Clinic Transfer Hours. This information can be viewed or updated in this section. Total Hours to date and Grand Total Hours will also be displayed in this section, but cannot be edited here. Enrollment Type is where you will list whether the student is Full Time, Part Time, Half Time, or 3/4 Time. This information is necessary for tracking and reporting purposes. The Transfer Codes are hardcoded into OnlineSMART and are generally used to determine what kind of transfer a student may be. For example: Transferring to the same school but a different location, transferring within the same school but to a different program, transferring from a different school, etc. Transfer Hours are hours a student completed at another school that your institution is accepting. If you are accepting a student's transfer hours, you must enter them so they can be tracked. You will enroll a student with transfer hours as you would a student that needs to complete the full course; assigning them the same course. When transfer hours are entered in the appropriate fields, they will also need to be subtracted from the total contracted hours needed for the assigned course (Financial tab). Transfer Credits may not apply to all schools. This field has been incorporated for those schools required to track hours and credits. The Transfer Credits field is where you will list the transfer credits a student has been granted. Clinic Transfer Hours may not apply to all schools. This field has been incorporated for those schools that are required to track clinic and non-clinic hours. The Clinic Transfer Hours field is where you will list the clinic transfer hours a student has been granted.

Changing the Enrollment Type

1. From the Attendance and Enrollment Information section, select the Enrollment Type from the dropdown menu.
2. If you have no other information to enter, select Save from the top menu of the screen.



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Entering a Transfer Code

1. From the Attendance and Enrollment Information section, choose the appropriate Transfer Code from the dropdown menu.
2. If you have no other information to enter, select Save from the top menu of the screen.

Entering Transfer Hours

1. From the Attendance and Enrollment Information section, enter the total amount of Transfer Hours in the designated field.
2. If you have no other information to enter, select Save from the top menu of the screen.
3. Then go to the Financial tab, update the financials to the correct amount, and adjust the student's contract hours. Example: If a student enrolls with 200 transfer hours, those 200 hours would be deducted from their total hours (total course hours 1800-200 = 1600 new contract hours amount).

Entering Transfer Credits

1. From the Attendance and Enrollment Information section, enter the total amount of Transfer Credits in the designated field.
2. If you have no other information to enter, select Save from the top menu of the screen.

Entering Clinic Transfer Hours

1. From the Attendance and Enrollment Information section, enter the total amount of Clinic Transfer Hours in the designated field.
2. If you have no other information to enter, select Save from the top menu of the screen.

STUDENTS: PROFILES: FINANCIAL TAB

Students Menu: Profiles: Financial Tab

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
4. Once you have selected the way you would like to search for your student or students, select the Search button.
5. This will generate a list of students meeting your search criteria.
6. Select the student's profile you wish to work in. You will be directed to that student's profile.
7. From here, select the Financial tab.

The Purpose of the Financial Tab

The Financial tab is used to track a student's contract information. Most of the information on this page will auto-populate when a course is assigned to a student. You can view the student's Contract Code, Contract Type, Amount, Minimum Monthly Payment, Contracted Graduation Date, Projected Maximum Time Frame, Enrollment Period, Tuition, Fees, Books/Kits, Other, Maintenance, Contract Dollars, and Contract Hours. You will also see the cost breakdown per enrollment period here. The Enrollment Period table is created when you develop your courses in the Administration pages. This allows extra line/periods to be entered, which will help break down tuition for your enrollment periods. Again, verify with your school administrator if you process financial aid by Payment Period, Academic Year, or Full Upfront Payment. This section will have different entries for each process. You can enter and edit information while on this tab for the Enrollment Periods; this will only affect the student's profile with which you are working. The Tuition column displays the tuition amount. The Fees column lists your enrollment, registration, or application fee. The BooksKits column lists the cost of your books and/or kit. The Other column is for any other type of charge that is not already listed. The ContractDollars column displays the amount of the contract and is a total calculated by the system of all of the previous columns. The ContractHours column lists the amount of hours the student is contracted for. The following data is available as read only on this tab: Dependency Status, Verification Status, Total Amount Paid, and Title IV Eligible.

Student Contract Section

This section is used to enter and save the student's contract information: Contract Code, Contract Type, Amount, Minimum Monthly Payment, Contracted Graduation Date, Projected Maximum Time Frame, Required Minimum Monthly Attendance Hours, and the program cost break down per enrollment period. The Contract Code dropdown options are user defined. You can design these codes to meet your institution's needs. The options for the Contract Code dropdown menu are setup in the



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Administration: Codes: Contract Codes tab. The Contract Type dropdown is where you will record each student's type of enrollment i.e. Full Time, 3/4 Time, Half Time, or Part time. This information is necessary to run certain reports. The Amount field is used to record the amount of the student's contract; this amount will auto-populate once you have assigned a course to a student. The Min Monthly Payment field is included in the Financial tab to record and view the amount of a student's minimum monthly payment. Once you have calculated a student's monthly payment, enter it in this field. Enter the student's contracted graduation date in the designated field, this date plays a very important role in the functionality of OnlineSMART. If this date changes due to a leave of absence (LOA), schedule change, etc; make sure it is updated. The contracted graduation date will be used for tracking purposes, appears on many reports including the NACCAS Annual Reports, and other various calculations in OnlineSMART. The Projected Max Time Frame field is a tool used to track when a student is approaching their maximum time frame.

Entering a Contract Code in the Financial Tab

1. From the Financial tab, select the appropriate option from the Contract Code dropdown menu. Remember, these codes are created in the Administration menu: under the Codes page.
2. If you have no other information to enter, select Save from the top menu of the screen.

Entering a Contract Type in the Financial Tab

1. From the Financial tab, select the appropriate option from the Contract Type dropdown menu. The contract type options are hardcoded by SMART (Full Time, 3/4 Time, Half Time, Part Time).
2. If you have no other information to enter, select Save from the top menu of the screen.

Entering an Amount in the Financial Tab

1. From the Financial tab, enter the new amount of the contract in the Amount field. This would be changed to reflect a new contract amount if a student received a discount or had transfer hours. Only make changes here that are reflected in your contractual statements.
2. If you have no other information to enter, select Save from the top menu of the screen.

Entering a Minimum Monthly Payment in the Financial Tab

1. From the Financial tab, enter the minimum monthly payment amount in the Min Monthly Payment field.
2. Also enter the same amount in the Monthly Payment field in the bottom left corner of the screen. Entering this information in both fields will update multiple reports in SMART.
3. If you have no other information to enter, select Save from the top menu of the screen.

Entering a Contract Grad Date in the Financial Tab

1. From the Financial tab, enter the contracted graduation date in the designated field.
2. If you have no other information to enter, select Save from the top menu of the screen.

Projected Max Time Frame

This field will auto-populate based off of the last day a student is scheduled for. If you change this date, SMART will revert the date back to the last day scheduled.

Updating Contract Information (Enrollment Period, Tuition, Fees, Books/Kits, Other, Maintenance, and Contract Hours) in the Financial Tab

1. From the Financial tab, select the Edit button to the right of the row you want to edit.
2. Edit the information as necessary and select Update.
3. Please NOTE: By editing this information, you are updating the ledger and changing the contract balance for the student. Edit this information only if it is reflected in the student's contract.

Financial Information Section

The FTI (Family Total Income) field auto-populates from the information on the ISIR tab. Some schools are required to track this information and that is why it has been added to the Financial tab of the Profile. The Monthly Payment field should reflect the amount input in the Min Monthly Payment field at the top of the Financial tab; this entry updates several reports in SMART. The remaining data in this section is read only; it includes Dependency Status, Verification Status, Total Amount Paid, and Title IV Eligible.



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STUDENTS: PROFILES: ISIR TAB

Students Menu: Profiles: ISIR Tab

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select the ISIR tab.

The Purpose of the ISIR Tab

The purpose of the ISIR tab is to display the main information uploaded off of a student's ISIR. If you choose to upload your students' ISIRs in OnlineSMART, you will also store the EFC (Expected Family Contribution) information and will be able to use it as part of the COA (Cost of Attendance) equation in the Financial Aid Worksheet. Although you can upload the main information from the ISIR, you will not have the ability to view all ISIR information. The data you will see displayed in the ISIR section is: AGI (adjusted gross income), US Income Tax Paid, Total from Worksheet A, B, and C, House Hold Size, Number in College, EFC, and Grade Level. This tab will not reflect any information if you do not upload your school's ISIRs into OnlineSMART. See the Administration menu: ISIR Administration page to upload ISIRs.

Viewing a Different Processing Year ISIR Information

1. From the ISIR tab, select the Processing Year of the information you want to view from the dropdown menu in the bottom right corner of the screen. Example: for 2016/2017, choose 2017.
2. If you have uploaded that processing year's ISIR, the information will display.

STUDENTS: PROFILES: P-ISIR TAB (Dependent Student)

Students Menu: Profiles: P-ISIR Tab

If the Dependent Status in a student's Personal tab, in the Demographic section, is marked Dependent, the P-ISIR tab will appear in their profile. If the student is Independent you will not see this tab.

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select the P-ISIR tab.

The Purpose of the P-ISIR Tab

The purpose of the P-ISIR tab is to display the main information uploaded off of a student's P-ISIR. This tab will not reflect any information if you do not upload your school's P-ISIRs into OnlineSMART. See the Administration: ISIR Administration page to upload ISIRs. The P-ISIR tab displays information off of the same ISIR record, but will be the parental information if the student is dependent.

Viewing a Different Processing Years P-ISIR Information

1. From the P-ISIR tab, select the Processing Year of the information you want to view from the dropdown menu in the bottom right corner of the screen. Example: for 2016/2017, choose 2017.
2. If you have uploaded that processing year's ISIR, the information will display.



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STUDENTS: PROFILES: ADMISSION TESTS TAB

Students Menu: Profiles: Admission Tests Tab

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select the Admission Tests tab.

The Purpose of the Admission Tests Tab

The Admission Tests tab is a place to record an admissions test, should one be required for enrollment. Some institutions require an admissions test be taken prior to being approved for enrollment. You may also use this section to keep track of any ATB (Ability to Benefit) Tests. The options for the Code Name dropdown menu can be created in the Administration: Codes page, under the Admission Test Codes tab.

Adding an Admissions Test to a Student Profile

1. From the Admission Tests tab, select the admissions test from the Code Name dropdown menu.
2. Enter the Test Date.
3. Enter the student's Score.
4. Enter the Location if applicable.
5. Select the Save button to the right of the row you are entering.

STUDENTS: PROFILES: CONTACTS TAB

Students Menu: Profiles: Contacts Tab

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select the Contacts tab.

The Purpose of the Contacts Tab

The purpose of the Contacts tab is to have an easily accessible location to store Emergency and Loan Contacts. You can also store the Lender, Guarantor, Loan Entrance Date, and Loan Exit date in the Loan Contacts section. You have the ability to store up to 7 contacts in this section. The contact titles are as follows: Spouse, Parent/Guardian, Emergency 1, 2, and Loan Contacts 1, 2 and 3. Should there be an emergency and you need to contact someone for a student, you can access this screen and view one centralized list of all contacts.

Adding a Contact

1. From the Contacts tab, enter the contact information into the designated fields. Be sure to enter only numbers in the numeric fields. For example: Years Known: 2.
2. Select Save from the top menu of the screen.



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STUDENTS: ATTENDANCE

Students Menu: Attendance Page

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select Attendance from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select the Attendance option.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Attendance page.

The Purpose of the Attendance Page

The purpose of the Attendance page is to track a student's attendance and absences. General attendance hours information is displayed on this page in a read only summary. You can also manually enter, edit, or delete attendance entries from this section of the profile.

Manually Entering Attendance

1. From the Attendance section, you will see a blank row of boxes in which you will enter attendance information.
2. Enter the date of attendance you are inputting in the Date field.
3. Enter the number of days you are inputting this entry for in the Days field. You can input a mass entry for several days. For example: You are doing one entry for three days; you would enter a 3 in the Days field. If you are doing entries for one day, enter a 1 in the Days field.
4. Enter the hours, minutes, and total hours in the designated fields according to your school's policy. There is an option to breakdown the total hours for each day into Demo, Non Clinic, Clinic and Total Hours. Whether you breakdown attendance hours or just track a daily total, you can change the way you view and enter attendance. To change this function, go to the Administration: Basic Setup: School Features tab. Select the Attendance Break Down Box and select the Save button. The breakdown of Demo and Non Clinic will not be reflected on reports.
5. Select whether this is an absence you are entering or whether the student was present.
6. Once you have completed your entry, select the Save New button to the right of the area in which you are entering information.

Manually Editing or Deleting Attendance

1. From a student's Attendance page, select the Edit or Delete option to the right of the entry you wish to edit or delete.
2. If you have selected Edit, you have the ability of updating anything you previously entered; date, number of days, hours; and absent/present status.
3. Once you have updated the necessary information, select the Update option to the right of the entry you are working in.
4. If you have selected Delete, a pop-up box will appear requesting that you confirm the deletion.
5. Verify that you are deleting the appropriate entry and select Yes.



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Entering Multiple Student Attendance

OnlineSMART is formatted to allow multiple student attendance entries at once. For example: If your school does not have a SMART time clock, and/or had a field trip and students were not able to clock in and out that day, you can use the Multiple Student Attendance section to easily enter all your students' time for that day.

1. Select Students from the main menu on the left side of the screen.
2. Select Multiple Student Attendance.
3. In the Name field, enter the first few letters of the student's last name. A dropdown box will appear with a list of all active students whose last names begin with the first few letters you entered.
4. Select the student you wish to enter attendance for from the dropdown box. This student's name and permit number will now auto-populate.
5. Tab past the Permit Number field.
6. Tab to the Date field. This area auto-populates with the current date, change the date if necessary.
7. Tab to the Days field and enter the number of days you are inputting attendance for.
8. Tab to the Hours field and enter the hours.
9. Tab to the Minutes field and enter the minutes.
10. Tab to the Total Hours field and enter the total hours, if necessary.
11. Mark whether the student is absent or present by selecting the appropriate circle.
12. Tab again to move to the next line, this will auto-populate the next line with the same student's name.
13. Repeat these steps on the same screen for all students you are entering attendance for.
14. Once you are finished, select Save from the top menu of the screen.

Attendance Records in the Attendance Section that are Highlighted in Red

If a student has an attendance entry when they are dropped or are scheduled to be on an LOA, that attendance entry will be flagged and highlighted in red. This is to alert you that the student has an attendance record for a day they are not scheduled to be there. In order for this function to work, the student's schedule needs to be setup and maintained. Once an LOA has been setup for a student in the LOA section of OnlineSMART, the days in the LOA date range will automatically be removed from the schedule. Please NOTE: Certain reports and calculations are affected by the schedule. In order for those to be correct, a student's schedule needs to be updated any time there are changes made.

STUDENTS: LEAVE OF ABSENCE (LOA)

Students Menu: Leave Of Absence (LOA) Page

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select LOA from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Leave of Absence.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Leave of Absence (LOA) page.



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The Purpose of the Leave of Absence (LOA) Page

The purpose of this page is to track a student's Leave of Absences. From this page you can view past and present LOAs, enter an LOA, edit an LOA, or remove an LOA. The ability to track students' LOAs in OnlineSMART is one of the many useful features available. This feature will allow you to easily track your students while they are on an LOA. There are certain flags available to inform you of how many LOA days each student has taken, and there are warnings given if attendance is being entered for a student who is on an LOA. These notifications are located on the Home tab in the Load Notification section to the right of the screen.

*****NOTE: An LOA must be scheduled prior to the start of the LOA in order to properly communicate with the schedule. If you back date an LOA it will be necessary to manually remove the student's schedule for that period of time.**

Scheduling a Leave of Absence

1. From the Leave of Absence section, enter the start and end dates of the LOA in the designated fields located at the bottom of the screen.
2. Select the Insert Range button.
3. A pop up box will appear giving you the option to change the contracted graduation date according to this LOA entry. If you would like the system to calculate the new contracted graduation date, select OK. If you wish to calculate the date yourself, select Cancel. NOTE: SMART calculates this date based on the number of calendar days for the LOA.
4. IMPORTANT: If you choose to calculate your own revised contracted graduation date, be sure to go to the Financial tab in the student's profile to change this date.
5. Select Save from the top menu of the screen.
6. After scheduling an LOA, the student's schedule must also be adjusted to accurately reflect the change to max time frame.

OR

1. Highlight the days on the calendar that you want to schedule the LOA for. You can select multiple days by holding the Ctrl button on your keyboard while selecting.
2. Select Save from the top menu of the screen.
3. A pop up box will appear giving you the option to change the contracted graduation date according to this LOA entry. If you would like the system to calculate the new contracted graduation date, select OK. If you wish to calculate the date yourself, select Cancel. NOTE: SMART calculates this date based on the number of calendar days for the LOA.
4. IMPORTANT: If you choose to calculate your own revised contracted graduation date, be sure to go to the Financial tab in the student's profile to change this date.
5. After scheduling an LOA, the student's schedule must also be adjusted to accurately reflect the change to max time frame.

Removing an LOA from the LOA Page

If you entered the wrong LOA dates or the dates have changed, you have the ability to remove or change it.

1. From the student's LOA page, select the days you want to remove from the LOA on the calendar. They will be highlighted in black. Once you select a specific day it will turn gray.
2. Select Save from the top menu of the screen.
3. A pop up box will appear giving you the option to change the contracted graduation date according to this LOA entry. If you would like the system to calculate the new contracted graduation date, select OK. If you wish to calculate the date yourself, select Cancel.
4. IMPORTANT: If you choose to calculate your own revised contracted graduation date, be sure to go to the Financial tab in the student's profile to change this date. Additionally, if you remove an LOA it is necessary to add those scheduled hours back into the student's schedule.

Adding Days to a Previously Scheduled LOA

1. From the student's LOA page, enter the revised start and end date of the LOA in the designated fields located at the bottom of the screen. You can also schedule individual days by selecting the date on the calendar.
2. Select the Insert Range button.



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3. A pop up box will appear giving you the option to change the contracted graduation date according to this LOA entry. If you would like the system to calculate the new contracted graduation date, select OK. If you wish to calculate the date yourself, select Cancel.
4. IMPORTANT: If you choose to calculate your own revised contracted graduation date, be sure to go to the Financial tab in the student's profile to change this date.
5. Select Save from the top menu of the screen.

STUDENTS: LAB GRADES

Students Menu: Lab Grades Page

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select Lab Grades from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Lab Grades.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Lab Grades page.

The Purpose of the Lab Grades Page

The purpose of this page is to track a student's lab grades and lab's performed. General student progress information is displayed on this page as read-only. From this page you can view, enter, edit, or delete lab grades.

Entering Lab Grades in the Student Profile

1. From the student's Lab Grades page, you will see a blank row of boxes in which you will enter lab grade information.
2. Enter the date the grade was earned on in the Date field.
3. Select the lab description from the Lab dropdown. The Lab dropdown options are created in the Administration: Lab Definitions page.
4. Enter the grade that was earned in the Grade field.
5. Enter the number performed in the # Performed field.
6. Enter the credits or hours for the lab, if applicable. The Lab Hour Included feature can be found in the Administration menu: the Basic Setup page: School Features tab. To learn more about school features like this see the Administration section of this manual.
7. Check the Affects GPA box if the grade you are entering will affect the student's GPA. If the grade does not affect the student's GPA, do not check this box, and this grade will not be a part of the GPA calculation.
8. Once you have completed your entry, select the Save button to the right of the area in which you are entering information.

*****NOTE: When choosing to affect GPA for multiple entries, the grade given will only be calculated once. For example: Ten performed labs at a grade of 90% equates to one entry of 90% towards the GPA calculation.**



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Entering Multiple Lab Grades

OnlineSMART's Multiple Lab Grades section gives the user the ability to enter grades for multiple students at a time or to enter multiple grades on the same student without having to begin a new entry and save each time you are entering a grade.

1. Select Students from the main menu on the left side of the screen.
2. Select Multiple Lab Grades.
3. In the Name field, enter the first few letters of the student's last name. A dropdown menu will appear with a list of all active students whose last names begin with the first few letters you entered.
4. Select the student you wish to enter lab grades for from the dropdown menu. This student's name and permit number will now auto-populate.
5. Tab past the Permit Number field.
6. Tab to the Date field. This area auto-populates with the current date, change the date if necessary.
7. Tab to the Lab dropdown. Select the lab description from the dropdown.
8. The Affects GPA box will auto-fill; leave this if the grade you are entering does in fact affect the GPA. If the grade being entered does not affect the GPA, uncheck this box.
9. Tab to the # Performed field and enter the number performed.
10. Tab to the Grade field and enter the grade earned. If this lab does not affect the GPA, and has no grade you can leave it as a zero. As long as the affects GPA box is not checked, this will not affect the overall grade.
11. Tab to the Credit/Hours field and enter the number of credits or hours if it applies to your school.
12. Tab again to move to the next line, this will auto-populate the next line with the same student's name.
13. Repeat these steps on the same screen for all students you are entering lab grades for.
14. Once you are finished, select Save from the top menu of the screen.

STUDENTS: GRADES

Students Menu: Grades Page

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select Grades from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Grades.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Grades page.

The Purpose of the Grades Page

The purpose of the Grades page is to track a student's grades. General student progress information is displayed on this page as read-only. From this page you can view, enter, edit, or delete grades.

Entering Grades in the Student's Profile

1. From the student's Grades page, you will see a blank row of boxes in which you will enter grade information.



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2. Select the test description from the Test dropdown. The Test dropdown options are created in the Administration menu: under the Test Definitions page.
3. Enter the date the grade was earned on in the Date field.
4. The Type box will auto-populate with the type of Test Definition that has been selected from the dropdown.
5. Enter the grade that was earned in the Grade field.
6. Enter the hours or credits for the grade, if applicable. The Include Hours and Credits When Grading Test feature can be found in the Administration menu: under the Basic Setup page: School Features tab. To learn more about school features like this see the Administration section of this manual.
7. Check the Affects GPA box if the grade you are entering will affect the student's GPA. If the grade does not affect the student's GPA, do not check this box, and this grade will not be a part of the GPA calculation.
8. Once you have completed your entry, select the Save button to the right of the area in which you are entering information.

Entering Multiple Test Grades

OnlineSMART's Multiple Test Grades section gives the user the ability to enter grades for multiple students at a time or to enter multiple grades on the same student without having to begin a new entry and save each time you are entering a new grade.

1. Select Students from the main menu on the left side of the screen.
2. Select Multiple Test Grades.
3. In the Name field, enter the first few letters of the student's last name. A dropdown box will appear with a list of all active students whose last names begin with the first few letters you entered.
4. Select the student you wish to enter grades for from the dropdown box. This student's name and permit number will now auto-populate.
5. Tab past the Permit Number field.
6. Tab to the Date field. This area auto-populates with the current date, change the date if necessary.
7. Tab to the Test dropdown. Select the test description from the dropdown.
8. The Affects GPA box will auto-fill; leave this if the grade you are entering does in fact affect the GPA. If the grade being entered does not affect the GPA, uncheck this box.
9. Tab to the Grade field and enter the grade earned. If this test does not affect the GPA, and has no grade, you can leave it as a zero. As long as the Affects GPA box is not checked, this will not affect the overall grade.
10. Tab to the Credit/Hours field and enter the number of credits or hours if it applies to your school.
11. Tab again to move to the next line, this will auto-populate the next line with the same student's name.
12. Repeat these steps on the same screen for all students you are entering test grades for.
13. Once you are finished, select Save from the top menu of the screen.

STUDENTS: DOCUMENTS

Students Menu: Documents Page

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select Documents from the top menu.

OR

1. Log in to OnlineSMART.
2. Select the Student option in the main menu to the left of the screen.
3. Select Documents.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.



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6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Documents page.

The Purpose of the Documents Page

Having the ability to upload documents into OnlineSMART is an exciting feature that has many benefits. Uploading documents can alleviate having to physically pull a student's file. It also allows a school to go "Green" as well as protect documents in case of a fire, theft, or disaster that may occur at the school. Additionally, if you are working in OnlineSMART, but are not at the school where files are accessible you can view any documents that you have uploaded to a student's profile in OnlineSMART. All documents are backed up at a remote, secure offsite location. Please NOTE: The maximum document size that you can upload is 30MB.

Uploading Documents

1. To upload documents into OnlineSMART, you will first scan the document and save it to your computer.
2. Then, from the student's profile, select Documents from the top menu.
3. Select New.
4. Type in a Name for the document (i.e. FAFSA, Driver License, etc) or select it from the dropdown in Recommended Type. This dropdown is created in the Administration menu: under the Documents Definitions page.
5. Type in the Description of the document (i.e. Copy of FAFSA, Copy of driver license).
6. Now, select the Browse button to find the file on your computer you wish to upload. Once you have selected the file, select the Save button.

Viewing and Deleting Documents

1. From inside a student's profile, select Documents from the top menu. Otherwise, select Students from the main menu to the left of the screen, then select Documents.
2. To View the document, select Get to the right of the name of the document you want to view and/or print.
3. A new window will appear asking if you want to Open or Save the document, choose whichever applies.
4. To Delete the document, select Delete to the right of the name of the document you want to delete.
5. A new window will appear asking if you want to delete this record, select OK or Cancel.

STUDENTS: FINANCIAL AID WORKSHEET (Fin Aid)

Students Menu: Profiles: Financial Aid Worksheet

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select Fin Aid from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Financial Aid Worksheet.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Financial Aid Worksheet (Fin Aid).



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The Purpose of the Financial Aid Worksheet

In the Financial Aid Worksheet you will enter a student's financial aid awards. Once awards have been entered for the different payment periods, you will have the ability to print an award letter. The Financial Aid Worksheet should be completed before funds are posted to the student's ledger.

Entering Current Year Awards in the Financial Aid Worksheet or Entering Subsequent Award Years

1. Choose the year from the Year dropdown. Use the award year that you will be paying the aid from.
***** Choose the later year in the current award year. For example: for 2015/2016, you would use 2016 for the year.**
2. Check the appropriate flags that apply to the student. (Please see below for flag information.)
3. When the Financial Aid Worksheet loads, a blank row will automatically appear on the screen to enter the student's first award. Every time you save an entry, a new blank row will appear underneath.
4. Select the program from the Program dropdown menu in the blank row. Choose the name of the award you are entering i.e. Pell, FSEOG, FDLPS, FDLPU, PLUS (use Grants, Scholarships, or Agencies as the program code for other grants, Voc Rehab, Tribal Grants, etc.). SMART offers a variety of programs to more specifically fit schools' needs for funding options such as Grants (choose LG Grant or S grant), Scholarships (choose Inst Scholarship, LG Scholarship, or S Scholarship), and Institutional Finance Plans (choose IFP or IoIFP). [It is the school's option to enter Veterans Education Benefits (VEB) on this tab. Info for 1098Ts will be pulled from student ledgers.]
5. Select the enrollment/pay period from the dropdown menu under Enrollment/Pay Period. Your enrollment or pay periods will be listed in this area upon assigning a course to a student's profile. (To learn more about adding pay periods, please see the Administration: Course section of this manual.)
6. Enter the anticipated disbursement date in the Anticipated Disbursement Date field.
7. Enter the award amount in the Award field.
8. Enter the loan fees in the Loan Fees field.
9. The Disbursed and Remaining fields will auto-populate. Once part of an award has been disbursed in the ledger, the amount received will show in the Disbursed field, and the remaining amount to be disbursed will show in the Remaining field.
10. IMPORTANT: Remember that the pay period assigned when setting up the award must match the pay period that is assigned to the posting on the ledger. If these two pay periods do not match, along with the year, and the program, you will not see the Disbursed and Remaining fields update from disbursements that are posted to the ledger.
11. Check the box under Need Based if appropriate.
12. Once you are finished recording your information, select the Save button to the right of the row you are entering.

*****NOTE: You must use the Financial Aid Worksheet for scheduling all Financial Aid awards, State Grants, Agencies, and Scholarships so award information will be available to pull into the SMART IPEDS report. The only time an award should be deleted from the Financial Aid Worksheet is if a student has declined the award. Awards that are awarded, but never disbursed should remain on the Financial Aid Worksheet for compliance reporting purposes.**

Editing an Award Already Setup in the Financial Aid Worksheet

1. Find the row that contains the award you wish to edit and select the Edit button to the right of the row.
2. Edit or update the existing information to reflect the corrected or current information.
3. Select Update to the right of the row you are editing; this will save the data you just entered.

The Title IV Eligible Box

The Title IV Eligible box is very important. You must check this box for each student who is Title IV eligible. This is one of the flags that will always appear on the right side of most screens. This allows the person who will be posting Title IV disbursements to know this student is eligible for Title IV. To remove the flag you simply uncheck the box and save. If you do not check the Title IV eligible box, when someone is posting to the ledger they will not see any Title IV programs listed in the program dropdown menu. Title IV will not be available to be posted to the ledger until the flag is checked in the Financial Aid Worksheet section of OnlineSMART. The flag will appear in the Flags section that is displayed vertically on the right side of the screen in the student profile.



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The Need NSLDS Box

Another very important flag is the Need NSLDS. You can check this box and it will allow any person looking at the student in OnlineSMART to see that they still need to run NSLDS. If you need NSLDS on a student, check the box and select the Save button; this will automatically set the flag. To remove the flag, uncheck the box and save. The flag will appear in the Flags section that is displayed vertically on the right side of the screen in the student profile.

The In Default Box

The purpose of the In Default box is to prevent any posting that a student may not be eligible for due to their default status on a federal student loan. When you discover a student is in default, check this box and select Save. This is also a useful tool to remind you to monitor a student who had a prior default and is on the six consecutive payment plans with the DOE. When the student is no longer in default, uncheck the box and select Save to remove the flag. The flag will appear in the Flags section that is displayed vertically on the right side of the screen in the student's profile.

The Estimated Family Contribution (EFC)

The EFC displays in the Financial Aid Worksheet when the ISIR has been imported.

*****NOTE: If you do not upload ISIRs, the EFC will not display in OnlineSMART.**

Need Based / Non-Need Based Award Types

When you are setting up awards in the Financial Aid Worksheet of OnlineSMART, you have the ability to check the box if the award is need based. Examples of need based aid would be Pell Grant, FSEOG, and Subsidized Loan. When assigning a student your school's determined need based aid, be sure to check the Need Based box. If you are setting up your school's determined NON-need based aid, you simply leave the Need Based box unchecked.

Award Letter

The Award Letter is used to advise the student of their estimated financial aid awards. The amount of aid that displays on the award letter print out will come from the aid that is setup on the Financial Aid Worksheet. The Award Letter in OnlineSMART contains authorization to credit account, information specific to awards that include loans, a notice to notify the financial aid office in the event of award or circumstance changes, information on how aid will be disbursed, and notice to remain in satisfactory academic progress. The Award Letter also advises that change in enrollment status may affect awards, that awards are for current year only, and gives the regulatory notice of right to cancel. By having the student sign this document, you eliminate the need for several additional forms because of the notifications that are included on the Award Letter.

Printing an Award Letter

1. To print an award letter you must be on the student's Financial Aid Worksheet.
2. From here, select the print option in the menu at the top of this screen.
3. Select the Student Financial Aid Award Notice option in the Report List box that appears.
4. Enter the award year of the award letter you wish to print. For example: 15/16 would be 2016.
5. Select the View Report button located in the upper right corner of this page.
6. To print the report, select a format to export the report to by selecting the blue export button located in the header of this page. A standard format to print in would be PDF.
7. A pop up box will appear that gives you the option to open or save. If you want to print, but not save this award letter to your desktop select Open. If you need to save this award letter before you print, select Save and you will have the option of choosing the location on your computer to save your award letter to.
8. Once the PDF file loads, select the Print option at the top left side of the page.

Verification Menu

Choose an option in the dropdown menu next to Verification. The options are: Not Required, Accurate, Reprocessed, Tolerance, W/O Documentation, and Selected, Not Verif.



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STUDENTS: SINGLE STUDENT LEDGER

Students Menu: Single Student Ledger Page

1. Log in to OnlineSMART.
2. Select Students from the main menu on the left side of the screen.
3. Select Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's profile.
8. From here, select Ledger from the top menu.

OR

1. Log in to OnlineSMART.
2. Select Ledgers from the main menu on the left side of the screen.
3. Select Single Student Ledger.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
5. Once you have selected the way you would like to search for your student or students, select the Search button.
6. This will generate a list of students meeting your search criteria.
7. Select the student's profile you wish to work in. You will be directed to that student's Ledger page.

The Purpose of the Ledger Page

The Ledger is a very important tracking system in OnlineSMART, especially if you are a Title IV eligible school. The Ledger is a centralized location to track payments, balances, Title IV, and other monies that pertain to a student's account. You can see what the student has paid to their account, what they have received in disbursements, what their current balance is, and any miscellaneous charges that have been posted including over contract charges, etc. You also have access to important flags that will display vertically on the right side of the Ledger page. These flags will help when posting monies such as Title IV. The flags are easily viewable and provide information including: total hours to date, student enrollment status, student SAP status (Satisfactory Academic Progress), whether the student needs NSLDS run, if verification is complete, if the student is in default, LOA status, start date, last day attended, anticipated graduation date, and contracted graduation date. All of this information is necessary when posting certain funds to the ledger. With the flags visible, you do not have to tab from screen to screen in order to view this information. The Ledger page has the ability to track ledgers for active students, prospective students, dropped students, and graduated students. *******VERY IMPORTANT: Type Codes and Allocation are crucial to how information is directed throughout SMART. Type Codes and Allocations must be understood before selecting. SMART is not liable for incorrect entries.**

Basic Steps for Posting a New Ledger Entry

1. Always work from top to bottom and from left to right.
2. Select New in the upper left corner of the ledger screen.
3. Enter the Period. (Only if you are entering a financial aid posting; if you are entering a cash payment you do not have to select a period.)
4. Enter the Disbursement Date and Posting Date.
5. Select the Type Code.
6. Enter the Check Number if applicable. This section can also be used to enter a description pertaining to the ledger entry.
7. Enter the Amount of the payment.
8. Select the Program appropriate to the ledger entry.
9. Select the Year appropriate to the ledger entry.
10. Use the bottom half of the screen to allocate funds to the appropriate location(s).



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11. When you are finished entering information, select Save from the top menu of the screen. You will be prompted to verify this posting. This allows you one more opportunity to review the Disbursement and Posting dates; these dates cannot be revised once you have saved the entry.

SMART provides recommendations in this manual for ledger posting procedures. However, each school should be guided by advice from their accountant/auditor regarding how best to manage the school's financial accounting processes/system. Schools may find it helpful to complete one student record in its entirety to submit to their accountant/auditor for review and consult. An example of items to present would be a completed ledger, printed program summary reports, and other various ledger reports (such as earned unearned). If you do not follow SMART's recommendations on ledger posting procedures, it could adversely affect financial aid reports and other compliance reports.

Periods

If you are entering a cash payment, you do not need to select a pay period. This is only necessary when entering a financial aid posting.

Pay periods are defined by each individual institution and can be setup per your own rules and guidelines. Periods are defined when you setup each course in the Administration menu: Course page.

Periods are used to determine which pay period monies or disbursements have been received in. This assists the institution in the monitoring and tracking of ledgers and monies as well as document compliance with federal regulations.

Pay periods will depend on the number of hours in a program, as well as the options available per federal regulations. If you are unsure about what your pay period definitions should be, you may want to contact your company administrator or corporate office. **Payment periods are not defined by SMART.**

Disbursement and Post Dates

These two dates may be the same or could be different, depending on your internal procedures. In general, the disbursement date is the date the funds were disbursed or deposited. The post date is generally the date that the funds were actually posted to the ledger. Use federal regulations as a guide for ensuring that deposits are posted within the appropriate time frame. Remember that these dates cannot be changed once the ledger posting is saved; review information thoroughly before saving.

Type Codes

ADJB (-only) This is used for adjusting charges only, not for posting payments. ADJB is used as a negative entry for student overage/credit balance checks to zero out the credit balance, for adjusting posting errors to create a record, or to add a charge for non-contract items. Examples of using ADJB are provided below.

CARD (+ or -) This is used as a positive entry for credit card payments.

CASH (+ or -) This is used for cash, money orders, and checks. It may also be used for agencies, scholarships, state grants, Sallie Mae Career Training loans, other alternative loans, or collections (if paid by money order or check). To refund monies that were posted as cash, use a negative cash amount.

CNCL (+ or -) This is used as a positive entry for drops to cancel the unearned portion of their tuition, kit, and books. Make sure you complete separate entries for these; taking care that the cancellations to kit and books are allocated to kit and books and not to tuition. CNCL is also used as a positive entry to cancel tuition for a payment period or academic year already charged on the financial tab and then again as a negative entry to add it back in when the student reaches the next payment period or academic year and needs to be charged for it. However, make sure that when you use it for this purpose you allocate the amount to OTHER only and not to tuition, kit, books, or fees; if posted to something aside from Other; it will adversely affect your earnings reports. For example, using cancel for Inst Scholarships will adversely affect the value per hour. Examples of using CNCL are provided on page 63-64.

DISB (+ only) This is used as a positive entry for Title IV funds only. This would include Pell, FDLPS, FDLPU, FSEOG, PLUS, PERKINS, and FWS.

MISC (+ or -) This can be used for items such as over contract payments, payment transfer of balances from one ledger to another for transfer course/program changes, and for the same things you would use CASH for. Use it to post payments for



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charges that were posted as ADJB. Remember it is a payment function, so if you use it as a negative, it will increase the balance. This will affect the total amount paid to the contract on reports. Examples of using MISC are provided below.

REFD (- only) This is used as a negative entry for refunds of Title IV funds to DOE or lenders only.

WOFF (+ or -) This is used when there is a negative or positive balance of less than \$1.00 on an account, the student has graduated, and all payments have been accounted for. It may also be used to write off bad debt. Your accountant can advise you about this.

Programs

SMART has provided a basic list of programs for your use. Schools can add their own custom programs to meet the needs of their school. When adding a program, do not select any of the boxes; these are for the use of the SMART programming team only.

Programs are used as descriptors on the student's ledger. Schools will often create programs for any miscellaneous charges that need to be posted to the ledger and are not part of the student's original contract. For example: Over contract fees, termination fees, interest payments, registration/application fees, unearned tuition, unearned kits and books, etc.

Program Summary reports can be found under the Ledger reports and will show funding associated with each program listed in SMART (both original programs and those created by the school). These reports can be pulled for the cumulative period, a date range, a fiscal year, or prior month.

If your school is receiving Title IV funding, you will need to check the Title IV Eligible box on the Fin Aid page for each student who is eligible for these funds. You will then see all the Title IV programs as options to post to on the student's ledger.

Only the programs created by SMART will report on the 1098-Ts. Use SMART's programs for Agencies, Scholarships, and Grants when posting these kinds of funds to ensure the accuracy of 1098-Ts.

****NOTE: Currently SMART recommends posting FSEOG funds with a Type Code of DISB, allocated to, for example, Fees, Kit, Books, or Tuition. We have added a program called SEOG MATCH. This program has been developed to represent the institutional match/contribution required of the school for FSEOG funds. We recommend posting with a Type Code of CASH (or MISC), allocated to, for example, Fees, Kit, Books, or Tuition. This program will be included on the 1098-Ts beginning January 2016 for funds posted in 2015 to Fees, Kit, Books, or Tuition under the program SEOG MATCH. These programs will be included in annual reports such as the FISAP and IPEDS.**

Selecting the Year

ADJB transactions are posted to the current calendar year.

CASH/CARD transactions are posted to the current calendar year (unless being used for scholarships, agencies, or grants and then apply to correct award year).

CNCL transactions are posted to the calendar year that the student's start date falls in.

DISB transactions are posted by the FA Award Year that they apply to (the last two digits i.e. 15 for 14/15)

MISC transactions are posted to the current calendar year.

REFD transactions are posted to the year and program that the original FA award was posted to.

WOFF transactions are posted to the current calendar year.

Allocating Funds (Bottom Half of the Screen)

The first five descriptions will update the student's contract balance, while the last three descriptions will not.

Tuition - This should reflect your contract charges and be for tuition only.

Fee - This should reflect your standard contract charges for all students like registration/application fees, lab fees, or a required State ID card fee.

Equip-Tools-Kit - This should reflect your contract charges and be for equipment, tools, or kit only.

Other - This is used when the fees, kit, books, and tuition have been fully paid. For example: Use for credit balances/overages. Items allocated to Other will not be included on the 1098-T.



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Student - This does not update the balance and should be used as a second entry after adjustment for credit balances paid to the student.

Books - Use this if you separate your books out from the rest of the kit or supplies.

Misc - Use this for posting payments to ADJB charges for non-contractual items you do not want to affect the contract balance and financial reports. This does not update the contract balance. However, it will affect the Miscellaneous Charges Balance amount in the upper portion of the ledger as well as the final consolidation information section that appears on the last page of the printed ledger.

OvrContract Fee - Use this in conjunction with ADJB type for posting charges and payments to over-contract. This does not update the balance. However, it will affect the penalty amount in the upper portion of the ledger, Over Contract Penalty Balance, and the final data section that appears on the last page of the printed ledger.

STUDENTS: RECOMMENDED LEDGER POSTING PROCEDURES

Posting a Charge for Miscellaneous Items/Charges and Paying Them

Items that are not part of the student's contract charges should, as a general rule, be posted as miscellaneous charges. This may include items specific to your school such as late fees, termination fees, interest payments on institutional finance plans, background check fees, missed day fees, parking fees, or any miscellaneous items that are specific to your school. As noted above, make programs for these items in the Administration pages.

To post a charge for a miscellaneous item, select ADJB as the type code; enter the amount of the charge as a negative number (Example: -25.00); choose the program that defines the miscellaneous charge; in the bottom section of the ledger screen, allocate the charge to miscellaneous and enter the same negative number (Example: -25.00). Once you save, the ledger will reflect, in this example, a -25.00 miscellaneous charge in the upper portion of the screen. Once the student pays the charge, the upper portion of the screen will reflect 0 as the miscellaneous charge.

When the student pays the miscellaneous charge, select the appropriate type code (CASH or CARD), enter the amount as a positive number (Example: 25.00), choose the same program code you used to post the charge, and in the bottom section of the ledger screen allocate the payment to miscellaneous and enter the same positive number (Example: 25.00). Once you save, the ledger will reflect a 0 balance in the upper portion of the screen.

Posting a Charge for Over Contract Charges and Paying Them

The same procedure listed above is used in this case. When posting the over contract charges, select ADJB as the type code, enter the amount as a negative number, choose Over Contract as the program (create this program), and in the bottom section of the ledger screen allocate the charge to Over Contract and enter the same negative number. The ledger will now reflect an over contract balance in the upper portion of the screen.

When the student pays the over contract charge, select the appropriate type code (such as CASH or CARD), enter the amount as a positive number, choose the same program code that you used to post the charge (Over Contract), and in the bottom section of the ledger screen allocate the charge to Over Contract. Once you save, the ledger will reflect a 0 over contract balance in the upper portion of the screen.

Student Overages and Paying Credit Balances to the Student (Title IV Students)

1. When posting payments to the ledger, as a general rule, pay any fees charged in the contract first, pay charges for kits and books second, and finally pay tuition charges. When all tuition charges for the payment period are paid, additional funds (overages) should be posted with the type code of DISB (Title IV Program) and allocated to Other in the bottom section of the ledger.
2. Then you will adjust the overage amounts off of the ledger. To do this, select ADJB as the type code, enter the amount of the overage as a negative number (Example: -1000.00), select Student Overage as the program (create this program), and in the bottom section of the ledger allocate the amount to Other, entering the same negative number (Example: -1000.00).
3. Then you will pay the overage amount to the student. To do this, select the appropriate type code (such as CASH or CARD), enter the amount of the payment as a positive charge (Example: 1000.00), choose Student Overage as the program, and allocate the payment to Student in the bottom row of the ledger.



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Cancelling Out a Payment Period or Academic Year on the Ledger (Title IV Schools)

Courses can be setup in SMART to mirror the process a school is using for processing their funding. For example: Courses can be setup as Cash Pay courses (for schools/courses that do not participate in Title IV funding), Academic Year courses (if the school is processing Title IV funds by academic year), or Pay Period courses (if the school is processing Title IV funds by payment periods).

SMART recommends that schools processing Title IV funding based on academic year or payment periods work only on the academic year or payment period the student is currently in. For example: If a course is setup to process funding in four payment periods, the first action on a student's ledger may be to cancel out payment periods 2, 3, and 4 or subsequent academic years. By doing this, the ledger will clearly reflect when the school has received all of the funding for that payment period or academic year, and any additional funding for that payment period or academic year will be student overage (see the procedure above for adjusting student overages off of the ledger and paying credit balances to the student).

For example: to cancel out payment periods 2, 3, and 4, choose CNCL as the type code; enter the amount of contract charges associated cumulatively with payment periods 2, 3, and 4; enter this as a positive amount. Choose the program Cancel PP 2, 3, 4 (create this program). In the bottom section of the screen, allocate to Other and enter the same positive amount. Once saved, the ledger will reflect that the current balance is equal to the amount of contract fees associated with the first payment period only. The process is the same if your course is setup for academic year processing; create the program Cancel AY 2 in this case.

Once all of the funding has been received for PP 1 or AY 1 as designated by your course setup, any credit balances have been paid to the student, and the student now has reached the number of hours to begin the next AY or PP, you will need to add the next AY or PP back on to the ledger. To do this, just reverse the original process. Using the payment period example above, select CNCL as the type code, enter the amount of contract charges associated with PP 2, and enter this number as a negative number this time. Choose the program Post PP 2 (create this program), in the bottom section of the screen allocate to Other, and enter the same negative number. Once saved, the ledger will reflect that the current balance is equal to the contract charges associated with payment period 2. The process is the same if your course is setup for academic year processing; create the program Post AY 2.

Continue this process until each AY or PP has been funded and all credit balances have been paid appropriately.

Posting Scholarships to the Ledger

As a general rule, scholarships should be posted to ledgers using the type code CASH or MISC when allocating to Tuition in the bottom section of the ledger screen; choose the program Scholarships which is already setup by SMART.

If the scholarship is a non-cash scholarship (a reduction in tuition), use the same procedure and add to the Check Number field a notation of Institution Non-Cash.

Scholarships should also be scheduled on the Financial Aid Worksheet (Fin Aid) so that they populate IPEDs reports correctly.

Ledger Posting for a Dropped Student (Title IV Student)

1. When a student receiving Title IV funding drops, the first step is to add back on the ledger any cancelled payment periods or academic year charges. This should be posted on the student's drop date. Please refer to Cancelling Out a Payment Period or Academic Year.
2. If the school charges a termination fee, post this as a miscellaneous charge. Please refer to Posting a Charge for Miscellaneous Items and Paying Them.
3. The school should complete their Institutional Refund Calculation to determine any unearned tuition. This should be posted by selecting CNCL as the type code, entering the amount of unearned tuition as a positive amount, selecting Unearned Tuition as the program code (create this program), and in the bottom section of the screen allocate to Tuition.
4. Once the R2T4 and the Institutional Refund Calculations are completed and the unearned tuition has been posted, enter any refunds made to federal sources by selecting REFD as the type code, entering the amount as a negative number, choosing the appropriate program (Example: Pell, FDLPS, FDLPU, etc.), and at the bottom of the screen allocate to Tuition or Equip-Tools-Kit as appropriate.

**** A sample ledger has been provided on page 80 for your review.



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Editing an Existing Ledger Entry

1. **IMPORTANT:** Allow Ledger Editing must be enabled in order to edit ledger entries. To activate ledger editing, please go to Administration: Basic Setup: School Features tab and on the top of the second column, select Allow Ledger Editing.
2. From the main ledger screen select the Edit option to the right of the entry you wish to edit.
3. This will direct you to the ledger posting and you will be able to edit all information except for Disbursement Date and Post Date.

*****NOTE: If a Disbursement Date or Post Date was entered incorrectly, you can zero out the dollar amounts of that entry and enter "Posting Error" in the Check Number field. Then create the new entry with the correct information. This will create an audit trail for your accountant/auditor. The posting error entry will not appear on the printed ledger.**

Printing a Receipt for an Entry in the Ledger

1. Once you have saved an entry, you will be directed to the main ledger screen. From here, you will select the icon that resembles a sheet of paper to the left of the entry you wish to print a receipt for.
2. The receipt will generate.
3. Select a file format from the blue export option located at the top of the screen. Most commonly used are PDF and Excel.
4. Once you have made your selection a new window will appear prompting you to Open or Save the receipt. Select which option applies.
5. Once you open the file, you may print the receipt. If you are a Title IV school, this receipt may be used as your regulatory notification of disbursement (Title IV). You should print two copies, one for the student and one for your records as proof of the date you gave it to the student.

Selecting the Recalculate Option

The Recalculate option is present in the top tool bar within the Ledger page. Selecting this option initiates the ledger recalculation. You will not normally need to use this option, but if you notice a recent posting has not updated the balance, select Recalculate and you will see the change in the balance.

Closing a Ledger

Closing the ledger will prohibit any more postings to the ledger. You would only choose to close the ledger when there is a zero balance, you do not anticipate any more monies coming in on this student, and do not want any other items to be posted to the ledger. You may also choose to temporarily close a ledger; as it is very easy to reopen. This is not a required tool to use in OnlineSMART. However, it is there in the event a user wishes to close a ledger for a short or extended period of time. The user will decide when to open or close a ledger.

1. From the student's ledger, select the Close option at the top of the screen.
2. Once you have done that, instead of seeing the word Close, you will now see the option to Reopen. If you ever see the Reopen option present in a student's ledger, this is your indication that the ledger has been closed and no other posting will be allowed until the ledger has been reopened.

Re-Opening a Closed Ledger

1. From the student's ledger, select the Reopen option at the top of the screen.
2. Once you have done that, instead of seeing the word Reopen, you will now see the option to Close. If you ever see the Close option present in a student's ledger, this is your indication that the ledger is opened and posting will be possible until the ledger has been closed.

STUDENTS: R2T4 CALCULATION

The Purpose of R2T4

The Return to Title IV Calculation is a tool that, if used properly, can help a school determine the amount of funds that need to be returned to Title IV after a student drops or is terminated from your institution. The R2T4 tool relies heavily upon the other areas of SMART in performing its calculation. Before using the R2T4 tool, SMART recommends the following areas be checked for accuracy.



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Prior to Running the R2T4 Calculation

1. The student must have a drop date (last date of attendance) and determined date entered on the Academic tab within the student profile.
2. The student's schedule must include the scheduled hours for each scheduled day from the student's start date to their last date of attendance.
3. Remove all days from the student's schedule that are after their last date of attendance.
4. Make sure any LOA days have been entered properly and that no scheduled hours still remain on those LOA days.
5. It is highly recommended to post all Title IV aid received on the student's ledger. The R2T4 tool will allow you to enter aid not posted on the ledger, but it is much easier to post it to the ledger instead of inserting it while running the R2T4 tool.

*****NOTE: All ledger postings should be posted prior to the students drop date in order to be calculated accurately in the R2T4.**

Running the R2T4 Calculation

1. Select R2T4 from the top menu of the student's profile page.
2. Select Period Used For Calculation, and select either Payment Period or Period of Enrollment.
3. Select Calculation Dates. The dates will pre populate with information from the attendance tab. Enter the beginning of the payment period or period of enrollment in the Start of Period field.
4. Enter the Withdrawal Date into the Withdrawal Date field.
5. Enter the Withdrawal Determination Date into the Withdrawal Determination Date field.
6. Select Step 1 - Student's Title IV Aid Information. This will communicate with the ledger and pull in all Title IV aid posted on the student ledger. Enter any Title IV aid you have not posted to the ledger in this tab as well.
7. The next step will be Step 5 - Institutional Charges. This will pull from the Financial tab. Select the Payment Amounts for the Period of Enrollment or the Payment Amounts for the Payment Period depending on how you charge. You may also manually enter the charges as appropriate for Regulations.
8. Select Run Calculation and export the report into PDF.

STUDENTS: GRADUATING A STUDENT TO AN ALUMNUS

Graduating a Student

1. From the student's profile, select the Graduate button in the upper left corner of the screen.
2. The Graduate Student section will appear at the top of the Details page, enter the Actual Graduation Date.
3. Select the Save button.
4. Remove all of the student's scheduled days after the last day of attendance.
5. Complete all work on the student's ledger.



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SECTION 7: ALUMNI

The Purpose of the Alumni Section

The purpose of the Alumni section is to store alumni student information in a centralized, easily accessible location. It is important to remember that if you need to edit demographic information, it is easier to do from the Students section and not the Alumni section. The Alumni section is mainly for tracking a graduate student's employment information and State Board exam records. Because of this, you will not find a great deal of demographic detail besides name, address, phone number, and email address. If you need to run reports for alumni, you can do this from the Reports section.

ALUMNI: ALUMNI PROFILES

Alumni Section: Personal Tab

1. Log in to OnlineSMART.
2. Select the Alumni option in the main menu to the left of the screen.
3. Select Alumni Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, graduates, former students, and all alumni.
5. Once you have selected the way you would like to search for your alumnus or alumni, select the Search button.
6. This will generate a list of alumni meeting your search criteria.
7. Select the alumnus' profile you wish to work in. You will be directed to that alumnus' profile.

Basic Alumni Information Field

There is a limited amount of information that can be added or updated in Alumni Profiles. You can add or edit an alumnus' address, phone number, email address, pass/place codes, graduate status, license information, and employment code. If you need to edit any other demographic information, you can do so by accessing the Students section and searching profiles for graduated students.

Pass Codes

The Pass field is where you will record the alumnus' results on the license exam. There are 11 pass codes hardcoded in OnlineSMART. You can view the list of pass codes by going to Administration: Codes: Pass-Place Codes tab. In order to comply with annual reports, such as NACCAS, these codes cannot be changed.

Graduate Status

The Graduate Status field is where you will select the graduate status of each alumnus. This information may be needed later for certain reports or accrediting agencies. The available graduate status codes are hardcoded and cannot be added to or changed. The following is the list of options you will find in the dropdown menu and their definitions.

1. Employed In Field - Student has graduated and found work in the same field they trained in.
2. Empld In Unrel Field - Student has graduated and is employed in a field unrelated to what they trained in.
3. Further Education - Student has enrolled in a different program/school to further their education.
4. Unemployed - Student has graduated, but has not found work in either a related or unrelated field.
5. Unknown - Student has graduated but their employment status is not known.
6. Other Unavailable - Student has graduated and their employment status is not an available option in the dropdown selections.
7. Incarcerated - Student has graduated, but is now incarcerated.
8. Active Military Serv - Student has graduated and is now actively serving in the military.
9. Death - Student has graduated, but has passed away.
10. Medical - Student has graduated, but is not employed due to medical issues.
11. International Stud - Student has graduated, but is an international student.



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License Exam Date Field

The License Exam Date field is used to record the date an alumnus passed their exam. This information may not be required for your institution to track, but is available in OnlineSMART for those schools who are required to track or wish to track this information.

License Number Field

The License Number field is used to record an alumnus' license number upon passing the exam. This information may not be required for your institution to track, but is available in OnlineSMART for those schools who are required to track or wish to track this information. This information does not print to a report.

Exam Grade Field

The Exam Grade field is used to record an alumnus' grade received on the exam. This information may not be required for your institution to track, but is available in OnlineSMART for those schools who are required to track or wish to track this information. This information does not print to a report.

Employment Code Field

The Employment Code field is where you will track an alumnus' employment code. These codes do not come hardcoded and it is left up to the user as to how they want to utilize this field. An example of an added employment code could be Cosmetologist or Nail Tech. Go to Administration: Codes: Employment Codes tab to add employment codes.

Un-Graduate a Student if Accidentally Graduated

If you accidentally graduated a student in OnlineSMART and realize it while you are still in the Alumni screen, you can quickly un-graduate them.

1. Once you have entered the Actual Graduation Date and selected the Save button you will be brought to the Personal tab of the Alumni section.
2. Select the Un-Graduate button in the upper left corner of the screen.
3. The student will now be returned to active status.

ALUMNI: EMPLOYERS TABS

Alumni Section: First, Second, and Third Employer Tabs

1. Log in to OnlineSMART.
2. Select the Alumni option in the main menu to the left of the screen.
3. Select Alumni Profiles.
4. This will bring you to a search engine where you can search by last name, first name, social security number, course, graduates, former students, and all alumni.
5. Once you have selected the way you would like to search for your alumnus or alumni, select the Search button.
6. This will generate a list of alumni meeting your search criteria.
7. Select the alumnus' profile you wish to work in. You will be directed to that alumnus' profile.
8. Select one of the three Employer tabs depending on the information you would like to see or enter.

The Purpose of the First, Second, and Third Employer Tabs

The First, Second, and Third Employer tabs are there to help your school track up to three current employers for each alumnus profile. At the top of this section, you will see the Date Last Modified, which displays the last date that this record has been added to or modified. Once you save your options you will see the current date and time under Date Last Modified.

Entering Employer's Information

1. Enter the company name in the designated field.
2. Enter First Name and Last Name. This could be the name of a contact person or a boss in the company.
3. Enter the employer's address.
4. Enter the phone number in the designated field.
5. Enter the date the alumnus started the job in the Date Started field.



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6. Enter the hourly wage in the designated field.
 7. Enter the annual income in the designated field.
 8. Enter the email address. For example, this could be a company email address or a contact person's email address.
 9. Select Save from the top menu of the screen.

Posting to a Ledger for an Alumnus

In order to post to or view a ledger for an alumnus you will have to access their profile from the Students section. As stated earlier, the Alumni section is used to track only the necessary items required for Alumni.



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SECTION 8: REPORTS

Reports Section

1. Log in to OnlineSMART.
2. Select the Reports option in the main menu to the left of the screen.

The Purpose of the Reports Section

The Reports section is designed to assist institutions in their daily, weekly, monthly, and annual record keeping and reporting requirements. OnlineSMART's reports save manpower by gathering and tracking important data input by the users and compiling detailed, comprehensive reports from that information.

REPORTS: STANDARD VS. QUERY

The Difference Between a Standard and Query Report Type

A Standard report is used when you want to include all students, past and present, or when running Annual, Security, and System Setup reports. There are additional reports that can only be run standard as well. A Query report allows a school to customize the information displayed on a report by narrowing down who is included on the report with filters. For example: You want to run an attendance report for only your active students; you can flag the report for active and only the students that are active in the system will appear on your report.

Running a Standard Report

1. From the Reports section, select the Report Type Standard.
2. Next, you will expand one of the folders depending on the information you are looking for. Your choices are Alumni, Annual, Ledger, Prospect, Security, Student, or System Setup. Some of the folders have subfolders, if necessary, expand the subfolder.
3. Once you expand the folder or subfolder, you will select the appropriate report from the list. A new window will open, and the report will generate. (If you do not see a new window open, check that your pop-up blocker within Internet Explorer's Internet Options is either turned off or set to allow pop-ups from OnlineSMART.) Generating the report may take a little longer than usual because this is a standard report and is pulling all students' data.
4. Once the report has generated, you can export the report. Find the blue export button in the top menu of the report page and select a format from the dropdown.
5. A new window will open asking if you want to Open or Save the exported version of the report, select whichever applies.
6. Once the exported version opens, you can print the report.

Querying a Report

1. From the Reports section, select the Report Type Query.
2. Next, you will expand one of the folders depending on the information you are looking for. Your choices are Alumni, Ledger, Prospect, and Student. Some of the folders have subfolders, if necessary, expand the subfolder.
3. Once you expand the folder or subfolder, you will select the appropriate report from the list.
4. Once you select the report, the query filter options will populate. Select a tab to see the query options listed. Below is a listing of your Query options.
5. Once you have selected your filter or filters, select the Print option in the upper left corner of the screen.
6. Once the report has generated, you can export the report. Find the blue export button in the top menu of the report page and select a format from the dropdown.
7. A new window will open asking if you want to Open or Save the exported version of the report, select whichever applies.
8. Once the exported version opens, you can print the report.

Query Filter Options

Listed below is a breakdown by tab of the different filters available for querying. These will vary by section.



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Query - Name Tab

Last Name - This gives you two fields to enter information in; using this option you can search a range of last names. For example: Anderson – Collins or simply A – C. IMPORTANT: If you cannot bring up your student by a last name, try querying by social security number.

First Name - This will pull student records matching the first name entered.

SSN (Social Security Number) - This will pull student records matching the SSN.

State - This will pull all student records that have an address in that state.

Permit Number - This will pull a student's record by permit number.

Prospect # - This allows you to query for a prospect number range.

Total Paid Amount - This allows you to query by a range of total monies paid by the prospect.

Query - Personal Tab

COA - This allows you to query by a cost of attendance range.

DOB - This field allows you to enter a date of birth range.

EFC - This allows you to query by an EFC range.

Verify Status - This allows you to query by verification status.

Grade - This allows you to query by a grade range.

SSN - This allows you to query reports for a prospect by SSN.

Sex - This field allows you to query by sex; you will select either Male or Female.

Race - This gives you a dropdown of race types to select from.

Marital Status - This gives you a dropdown of marital statuses to select from.

Scholastic Level - This gives you a dropdown of scholastic levels to select from.

Referral Code - This gives you a dropdown of referral codes to select from.

Tracking Code - This gives you a dropdown of tracking codes to select from.

Financial Aid - This gives you a dropdown of financial aid types to select from.

Education Level - This gives you a dropdown of education levels to select from.

Housing Plan - This gives you a dropdown of housing plans to select from.

Grade Level - This gives you a dropdown of grade levels to select from.

Employment Code - This gives you a dropdown of employment codes to select from.

Pass Place Code - This gives you a dropdown of pass place codes to select from.

Graduation Status - This gives you a dropdown of graduation statuses to select from.

Veteran - This allows you to check a box to include anyone marked as a veteran to pull on the report.

Query - Dates Tab

All of the date query options are in date range format, if you want to query for a single day, use the same date twice. Here is an example of the date range fields you may find.

Initial Date - This would be the initial contact date.

Appointment - This allows you to query by appointment date range.

Enrolled Date - This is the enrollment date.

Start Date - This is the actual start date.

Original Start - This is the original start date, for circumstances where the start date has changed.

Drop 1 - This is for students that have dropped one time. If the student has dropped and re-enrolled more than once, this would be the date they dropped the first time.

ReEnroll 1 - This is for students that have dropped and re-enrolled. This is the re-enrollment date; if they have dropped and re-enrolled more than once, this would be the date that they first re-enrolled.

Drop 2 - This is for students who have dropped a second time.

ReEnroll 2 - This is for students who have re-enrolled a second time.

Contract Grad - This is for the date that the student is contracted to graduate. This is not the actual graduation date.

Max Time Frame - This is the maximum time frame a student has to graduate by. This reads from the last day of a student's schedule; this date is calculated by the school, not SMART.

Actual Grad - This is the date that the student actually graduated on.

Ldgr Closed - This date range will help you find every student that had their ledger closed within a date range.



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Determined - This is the date that the school determined that a student has withdrawn.

License Exam - This date range will help you find every student that took their license exam within a date range.

DOB - This allows you to query by date of birth date range.

HS Grad - This allows you to query by high school graduation date range.

Query - Courses Tab

Course Hrs - This allows you to query by a course hours range. Course hours are contract hours, not attended hours.

Attendance Hours - This allows you to query by an attendance hours range. This is how many hours attended.

Course - This gives you a dropdown of available courses to select from.

Enrollment Type - This gives several checkboxes for available enrollment types.

Contract Hrs - This is a single field with which you can query for students who have a certain amount of hours.

Class - Time of day the student attends; Day or Night.

Admission Rep - This allows you to query students by their assigned admissions representative.

Query - Financial Tab

Contract \$ - This is a range, and allows you to query by total amount of contract.

Amount - This allows you to query by total amount of contract as well.

Check # - This is a range that allows you to query by the check numbers you are looking for.

Pay Period - This field allows you to query by students in a specific payment period.

Fee Paid - This field allows you to query by the amount of fees paid by students.

Financial Aid - This gives you a dropdown of available financial aid types to select from.

Dependent - This flag allows you to query by students dependent or independent status.

Ledger Type - This gives you a dropdown of available ledger entry types to select from.

Program - This gives you a dropdown of available programs to select from. SMART has provided the option to query by All Direct Loans and Direct Student Loans here as well.

Ledger Code - This gives you a dropdown of available ledger codes to select from.

Head of Household - This is a check box that if selected, will pull all students who are considered head of household.

Zero EFC - This is a check box that if selected, will pull all students who have a Zero EFC.

Maint \$ - This allows you to query by maintenance amount.

Total Family Income - This allows you to query by total family income amount.

Query - Flags Tab

Drop Code 1 - Enter a drop code in this field; anyone with that drop code for their first or only drop, will pull on the report.

Drop Code 2 - Enter a drop code in this field; anyone with that drop code for their second drop date will pull on the report.

Ledger Closed - By selecting this box you will pull every student who has a closed ledger.

Title IV - By selecting this box, you will pull everyone who is Title IV eligible.

Dropped - By selecting this box, you will pull all dropped students.

Active - By selecting this box, you will pull all active students.

Verify - By selecting this box, you will pull all students that are selected for verification.

SAP - By selecting this box, you will pull all students that are in SAP.

NSLDS - By selecting this box, you will pull all students that have NSLDS.

Over Contract - By selecting this box, you will pull all students that are over contract.

Not SAP - By selecting this box, you will pull all students that are not in SAP.

Not Active - By selecting this box, you will pull all graduated, dropped, and inactive students.

Is Active On - This allows you to enter a date range and will pull all students that were active at any point in that date range.

The flags query allows you to select the following check boxes: Veteran, Active, Need Award, Dependent, Not Active, Non Need Award, Ledger Closed, NSLDS, Loan Default, and Title IV.

Query - Grades tab

GPA - This allows you to enter a GPA range to query by.



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REPORTS: DAILY REPORTS

Satisfactory Academic Progress Report

1. Reports: Query: Student: SAP / Scheduled vs Actual: Flags: Active.
2. This report is queried for active students; it is used to determine the SAP of each active student on a daily basis. Keep a copy in a binder or save it to your computer so you have the SAP for each student each day on file. You will not be able to query this report for past days. It is important to keep copies of this report in a binder or to your computer. You can not only look at this report daily to determine the hours a student has reached and whether or not they are in SAP (for release of funds), but also to determine whether or not they have reached the second academic year. Once they reach the second academic year you may post the second year charges on the ledger utilizing a negative cancel to other.

Leave of Absence Status Active Student Report

1. Reports: Query: Student: Leave: Leave of Absence Status Active Student.
2. It is recommended that you run this report daily to see whether or not a student is due back from an LOA the following day. Once you determine that a student's LOA ends the day you are running the report, you can contact the student to get a better idea of whether or not they plan to return. If they do not, you can utilize the time you have to get an extension of their LOA prior to the student not returning from their LOA.

REPORTS: WEEKLY REPORTS

Last Payment Summary Report

1. Reports: Query: Ledger: Last Payment Summary.
2. This report shows all students that have a cash amount they are scheduled to pay monthly. It gives you the max time frame date, as well as the monthly amount they are set to pay. It will also show you the last payment that was posted to the ledger for their record and whether it was self-pay or financial aid. This will help you determine how long you have until they will be finishing, as well as what monies have been posted to the ledger and the amount to expect from them.

Last Payment Aging Summary Report

1. Reports: Query: Ledger: Last Payment Aging Summary.
2. This report is the same as the Last Payment Summary except it will show you how late they are on their scheduled payment (in relation to 30/60/90/120 days late). Under the column Number of Days Late you will see a tally of the total amount owed, depending on how late the student is.

Contract Graduation Approaching Report

1. Reports: Query: Student: Contract Graduation Approaching.
2. This report will show you who is expected to graduate or has a contracted graduation date within the next thirty days. This report is valuable as you may prepare over contract calculations on the students as well as counsel the students based off of the provided information. This is a good report to discuss with the director, as you should get an idea of who will be extending their enrollment, as well as who you need to focus on regarding attendance issues.

Days Absent Exceptions Date Range Report

1. Reports: Standard: Student: Attendance: Days Absent Exceptions Date Range.
2. This report queried for a date range will give you the ability to determine who has missed time within the date range you specify. Meeting with the director and pinpointing the students with attendance issues is the first step to turning attendance around. Once you run this report, you may highlight the students that have missed more than what your school permits. You may call these students in to meet with you and the director and run an evaluation report on them to document your counsel with them. Please refer to your schools policy and procedures for absences and minimum attendance.

Financial Aid Disbursement Pending Date Range Report

1. Reports: Query: Ledger: Financial Aid Disbursement Pending Date Range.
2. Disbursement forecasting allows you to determine the best possible estimate, based off the current hours the student has and the schedule entered for the student, of when they should hit the midpoint entered in Administration under Course. This



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report is valuable and can be used to enter the estimated disbursement dates in the financial aid worksheet as well. Once you have entered the student's schedule, you can run this report and enter the dates provided in the Financial Aid Worksheet page (Fin Aid page). You can run this report after building a mock student and scheduling them out for a couple of years of when they should hit the end of the program, thus giving you the graduation date of a student (for a start class).

Total Hours Summary Report

1. Reports: Query: Student: Attendance: Total Hours Summary.
2. This is an attendance report that will provide you with the total hours of each student. You can query this for a certain day and it will give you not only the total hours cumulatively, but also the hours a student obtained on the date that you chose.

Scheduled vs. Actual Hours Start Date Range Report

1. Reports: Query: Student: Attendance: Scheduled vs Actual Hours Start Date Range.
2. This report pulls its information from the schedule tab (where you enter the hours a student attends daily, as well as the start and end date of the student) and also the attendance tab (populates attendance from the time clock or manual entries on a daily basis). It is important that these two areas are correct in order to allow the scheduled vs. actual hours to report the percentage for days, as well as hours on prior month, cumulatively or for a date range that you specify.

REPORTS: MONTHLY REPORTS

Earnings and Receivables Details for Prior Month Date Range Report

1. Reports: Query: Ledger: Earnings and Receivables - Details.
2. This is an all inclusive report that gives you the outstanding contract balance and tells you your earned tuition for period and cumulative. It will show your value per hour, as well as the breakdown of what the students have paid in relation to fees, tuition, etc. This is the most common report used by accounting. NOTE: This report uses Posted Date data, not Disbursed Date.

Earned Unearned Prior Month Report

1. Reports: Query: Ledger: Earned Unearned Using Attended: Earned Unearned by Period Prior Month.
2. This report is used by accounting to record the earnings for the prior month. This report will show you the value per hour as well as the total earned.

Scheduled vs. Actual Hours Prior Month Report

1. Reports: Query: Student: Attendance: Scheduled vs Actual Hours Prior Month.
2. This report will show you the prior months scheduled hours for each student, as well as the hours the student actually obtained. This is a good report to look at to see not only if someone is missing time from tardiness or absences, but to also identify anyone who is exceeding the program. It is just as important to counsel students who are missing time as it is to determine who is exceeding. Pell and loans are not only certified off a number of hours but also a number of weeks. Someone who finishes the number of hours prior to completing the number of weeks is exceeding the program. This is a good report to run and have available to those who are approving students to make up time. If the percentage of attendance is over, or close to being over 100%, the student should not be allowed to sign up for makeup time as they do not have makeup time to complete.

Academic Transcript Exam Date Order Prior Month Report

1. Reports: Query: Student: Academic Transcript: Academic Transcript Exam Date Order Prior Month.
2. This report is used in most schools as a report card. Academic Transcripts Prior Month will show all completed test and labs, as well as cumulative percentages for GPA, Scheduled vs. Actual, and projected dates. This report can be printed with a signature line if selected to do so in the Administration menu: Basic Setup: School Academics tab, it can hold a title and name of the Director. Please see Basic Setup to record the name and title of the school representative. It is also recommended to print the Attendance History Prior Month and attach it to this report so the students can see each day of the prior month and what hours they completed for each day. You may also run a Ledger Statement for each student to provide the student with not only the grades and attendance, but also the payment activity for the prior month.



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Ledger Statement Report

1. Reports: Query: Ledger: Ledger Statement.
2. This report is a record of all payments received on the student account. It can be queried for cumulative or prior month.

Monthly Attendance Hours Report

1. Reports: Query: Student: Attendance: Monthly Attendance Hours.
2. This report will show the student hours for each day of the selected month and give cumulative percentages on attendance.

Progress Report and/or Evaluation Report

1. Reports: Query: Student: Progress Report: Progress Report -or- Reports: Query: Student: Academic Transcript: Evaluation Report.
2. The progress report can be utilized as a report card, or as a progress report, when meeting with the student. This report will show the start date as well as the anticipated graduation date. A student's anticipated graduation date is based off of the student's remaining contract hours and their schedule. It gives the last date of attendance, GPA, total hours scheduled, and total hours attended. In addition, it lists the labs and tests the student has completed; the progress report gives you the information needed to know if they should be placed on honor roll or SAP, as well as probation or suspension.
3. The evaluation report is a report you may use to evaluate your students and make a game plan for the upcoming months. This report does not show the completed labs and tests, but if exported into excel you may write your evaluation notes and plans for the upcoming month on the form and have the student sign the evaluation. Having documentation in the student file regarding excessive absenteeism, etc., is a good idea. It helps the students, and assists the staff in effectively initiating change and offering direction.

REPORTS: ADDITIONAL REPORTS RECOMMENDED BY DEPARTMENT

Accountant/CPA

1. Earned Unearned Using Attended Hours
Reports: Query: Ledger: Earned Unearned Using Attended Hours
2. Refund Summary
Reports: Standard or Query: Ledger: Refund Summary
3. Program Summary
Reports: Standard or Query: Ledger: Program Summary
4. Income Statement
Reports: Standard or Query: Ledger: Income Statement

Admissions Representative

1. Category Breakdown
Reports: Query: Prospect: Category Breakdown
2. Mail Labels
Reports: Query: Prospect: Prospect Mailing Labels by Name or Zip Code
3. Messaging (Prospect or Student or Alumni) List
Reports: Standard: (Prospect or Student or Alumni): Messaging (Prospect or Student or Alumni) List
4. Monthly Prospect Tally
Reports: Query: Prospect: Monthly Prospect Tally
5. Prospect Conversion Statistics
Reports: Standard: Prospect: Prospect Conversion Statistics
6. Prospect General Report with Comments
Reports: Standard or Query: Prospect: Prospect General Report With Comments

Financial Aid Representative

1. Earned Unearned Using Scheduled Hours
Reports: Query: Ledger: Earned Unearned Using Scheduled Hours
2. Transactions
Reports: Standard: Ledger: Transactions



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3. Program Summary
Reports: Standard or Query: Ledger: Program Summary
 4. SFA Compliance Audit
Reports: Standard: Ledger: SFA Compliance Audit
 5. Student Demographics
Reports: Standard: Student: Student Demographics
 6. Student Attendance History
Reports: Standard or Query: Student: Attendance: Student Attendance History

Instructors

1. Emergency Contacts
Reports: Standard: Student: Emergency Contact
2. Student Attendance History
Reports: Standard or Query: Student: Attendance: Student Attendance History

Management / Directors / Owners

1. Student Demographics
Reports: Standard: Student: Student Demographics
2. Enrollment Status
Reports: Standard or Query: Student: Enrollment Status
3. Program Summary
Reports: Standard or Query: Ledger: Program Summary
4. Refund Summary
Reports: Standard or Query: Ledger: Refund Summary

MAX TIME FRAME GUIDE							
Minimum Attendance Rate	67%	70%	75%	80%	85%	90%	95%
Max Time Frame Length For Each Course	1.5 x course length	1.43 x course length	1.33 x course length	1.25 x course length	1.18 x course length	1.10 x course length	1.05 x course length
Course Hours							
300	450	429	399	375	354	330	315
350	525	501	466	438	413	385	368
400	600	572	532	500	472	440	420
450	675	644	599	563	531	495	473
500	750	715	665	625	590	550	525
550	825	787	732	688	649	605	578
600	900	858	798	750	708	660	630
650	975	930	865	813	767	715	683
700	1050	1001	931	875	826	770	735
750	1125	1073	998	938	885	825	788
800	1200	1144	1064	1000	944	880	840
850	1275	1216	1131	1063	1003	935	893
900	1350	1287	1197	1125	1062	990	945
950	1425	1359	1264	1188	1121	1045	998
1000	1500	1430	1330	1250	1180	1100	1050
1050	1575	1502	1397	1313	1239	1155	1103
1100	1650	1573	1463	1375	1298	1210	1155
1150	1725	1645	1530	1438	1357	1265	1208
1200	1800	1716	1596	1500	1416	1320	1260
1250	1875	1788	1663	1563	1475	1375	1313
1300	1950	1859	1729	1625	1534	1430	1365
1350	2025	1931	1796	1688	1593	1485	1418
1400	2100	2002	1862	1750	1652	1540	1470
1450	2175	2074	1929	1813	1711	1595	1523
1500	2250	2145	1995	1875	1770	1650	1575
1550	2325	2217	2062	1938	1829	1705	1628
1600	2400	2288	2128	2000	1888	1760	1680
1650	2475	2360	2195	2063	1947	1815	1733
1700	2550	2431	2261	2125	2006	1870	1785
1750	2625	2503	2328	2188	2065	1925	1838
1800	2700	2574	2394	2250	2124	1980	1890
1850	2775	2646	2461	2313	2183	2035	1943
1900	2850	2717	2527	2375	2242	2090	1995
1950	2925	2789	2594	2438	2301	2145	2048
2000	3000	2860	2660	2500	2360	2200	2100
2050	3075	2932	2727	2563	2419	2255	2153
2100	3150	3003	2793	2625	2478	2310	2205
2150	3225	3075	2860	2688	2537	2365	2258
2200	3300	3146	2926	2750	2596	2420	2310
* For students w/ transfer hours, multiply # of contracted hours times the max time frame course length. Ex: for a student contracted for 618 hours at an 80% attendance rate, the formula would be $618 \times 1.25 = 772.5$, schedule this student for 772.5 hours.							

1223 N. Main St., Phoenix, AZ 85015
(602)555-5566
Ledger Statement
Cumulative

Drop, Darren
123 N. Power Rd.
Phoenix, AZ 85024

Permit Number: 658-5706
Contract: \$18,100.00
Monthly Amount: \$0.00
ID Number: 658-5706
Home Phone: (602)555-1133

Transaction						Pay		Tot Pd	Contract
Date	Year	Type/Code	Amount	Voucher Number	Program	Period	Tot Pd-Student	Contract	Balance
1/1/2013	2013	CNCL/Other	7000		Cancel		0	7000	11100
1/2/2013	2013	CARD/Fees	100	Amex #4545	Application Fee		0	7100	11000
1/3/2013	2013	DISB/Books	2000		PELL	11	0	9100	9000
1/3/2013	2013	DISB/Tuition	775		PELL	11	0	9875	8225
2/1/2013	2013	DISB/Tuition	1733		FDLPS	11	0	11608	6492
2/1/2013	2013	DISB/Tuition	2970		FDLPU	11	0	14578	3522
3/10/2013	2013	ADJB/Misc	-25		Late Fee		0	14578	3522
3/12/2013	2013	CASH/Misc	25		Late Fee		0	14578	3522
4/16/2013	2013	DISB/Tuition	2775		PELL	12	0	17353	747
4/16/2013	2013	DISB/Tuition	747		FDLPS	12	0	18100	0
4/16/2013	2013	DISB/Other	986		FDLPS	12	0	19086	-986
4/16/2013	2013	DISB/Other	2970		FDLPU	12	0	22056	-3956
4/20/2013	2013	ADJB/Other	-3956		Credit Balance To Student		0	18100	0
4/20/2013	2013	CASH/Student	3956	Stu Chk #5874	Credit Balance To Student		3956	18100	0
5/30/2013	2013	ADJB/Misc	-150		Termination Fee		3956	18100	0
5/30/2013	2013	CNCL/Other	-7000		Post		3956	11100	7000
5/31/2013	2013	CNCL/Tuition	4800	School retains 70%, cancels 30% tuition	Unearned Tuition		3956	15900	2200
6/1/2013	2013	REFD/Tuition	-1000	Refund to Unsub Loan	FDLPU	12	3956	14900	3200
Current Cumulative Data for: Drop, Darren						658-5706	7723		
Total Tuitt: 8,000.00			Book: 2,000.00		Fee: 100.00	Kit: 0.00	Other: 0.00		
Total Over Contract Penalties Bal.:			0			Started: 1/1/2013	LOA: n/a		
Total Miscellaneous Balance:			-150			Drop1: 5/30/2013			

Canceling AY 2 and then adding AY 2 back on

Posting a cash or credit card payment: no need to use the Pay Period option

Posting disbursements (Title IV)

Posting and paying miscellaneous charges (same for overcontract)

How to post tuition when the amount you are posting is more than the school can keep.....overage goes to "Other"

How to complete a "Credit Balance" or "Overage" to the student, 2 steps required

Posting Unearned Tuition: once the school has completed their Institutional Refund Calculation

When the school is required to make a refund to a Title IV source