ONLINESMART
MANUAL

SMART, Inc.
480-744-0050
www.onlinesmart.net
Support@OnlineSMART.net

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 your internet browser and click or type https://onlinesmart.net.
2. Click the Login button, in the upper right portion of the web page, and select OnlineSMART.
3. Enter your Username, Password, and Company abbreviation.
4. Select Submit to login.

ADDING A NEW PROSPECT

1. Select Prospects from the main menu.
2. Select New Prospect.
3. Enter the prospect's First Name, Last Name, and phone number.
4. We suggest filling in as much prospect information as possible prior to enrolling.
5. Enroll the prospect to a student using the instructions below.

ENROLLING A STUDENT

1. Social security number and Course (in the Academics tab) are required to enroll a prospect to a student.
2. From the prospect's profile, select the Enroll button from the top menu.
3. Select options or enter information for: the Enrollment Type, Class, Length, and Contract Grad Date.
4. Select Save. (The remaining fields are for Credit Hour schools.)

ENTERING A SCHEDULE

1. From a student's profile, select Schedule 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.
6. From the top menu, select Insert Range to create this student's schedule.

Tips:

➢ *We recommend scheduling to Max Time Frame; enter the Max Time Frame date as the end date.*

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 attendance date and enter the hours that were completed.
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.

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 grade date and select the Lab or Test grade from the drop-down list.
5. Enter a grade for a test, and/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.

Tips:

➢ *For Multiple Attendance, Multiple Grades and Multiple Lab Grades, SMART advises that you select save, from the top menu, after entering 5 - 20 grades.*

SECTION 1: GENERAL OVERVIEW

ACCESSING YOUR SCHOOL'S ONLINESMART (Video)

1. Open your internet browser and click (or type) this link https://onlinesmart.net. OnlineSMART is optimized for Windows internet browsers, such as Internet Explorer, Chrome or Firefox. Browsers that were originally designed for other operating systems, such as Safari for Mac or Opera for Linux, 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.
5. When you are ready to enter OnlineSMART, select your school name at the bottom of the page.

Tips:

- *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.*

ANNOUNCEMENTS PAGE

The Announcements page is the first page that is displayed when you log in to OnlineSMART. Please be sure to scan the announcements for new items, such as updated annual reports, and scheduled maintenance times. The Effective Date column will show you when the announcement was posted and the End Date column will show you when the announcement will be hidden from view. If you would like to view all of our previous announcements you can select the View All button.

KNOWLEDGE BASE

The first entry on the announcements page displays links to the SMART system Knowledge Base. This entry is always at the top and will not be hidden. Also included is a link to a Knowledge Base article listing links to all of the videos in the Knowledge Base. Once you select a link it will open up in a new tab or browser window (depending on your browser setting).

The Knowledge Base contains articles and videos pertaining to the use of your SMART software.

HOME PAGE (Video)

After selecting your school, you will automatically be directed to 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. When you select a different school to work in, the rest of the menu options (Administration, Alumni, Students, Prospects, Ledger, and Reports) will display information from that school. Another feature of the Home page is the Notifications side bar on the right side of the screen. This section displays 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. The Tickler Reports section of the Notifications side bar displays lists of prospects, students, or alumni that require a follow-up.

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.

Tips:

- *To verify what campus you are currently logged in to, you can move the mouse cursor over the internet browser tab and an information window will pop-up briefly. The pop-up will display the following information "School Management System – (School ID)/(the location you are working in)".*
- *This information can be accessed in the same manner from any part of OnlineSMART.*

Main Menu

The Main Menu is how you will navigate to different parts of OnlineSMART. It stays exactly the same throughout the majority of the system. If a user is not granted access to a certain part of OnlineSMART, then the corresponding menu option will not be displayed. Starting from the bottom, you have the following options:

Logout – This logs you out of OnlineSMART and takes you back to the log in page.

Help – Options to assist you with using OnlineSMART.

Reports – Various reporting options in OnlineSMART.

Ledgers – Direct links to student and prospect ledger pages.

Prospects – Various links to information about your prospective students.

Students – Various links to information about your active, dropped, and graduated students.

Alumni – Various links with additional information regarding your graduated students.

Administration – Various links regarding how your OnlineSMART system works.

User Administration – This page is mainly for organizing your OnlineSMART users.

Home – This page is for accessing your different campuses and the school Notifications section.

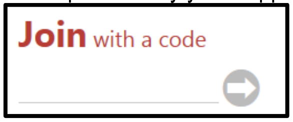
Help Options
Under the Help menu section there are a four different links.

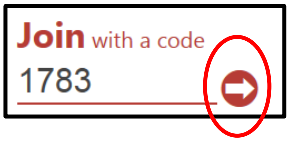
Estimated Contract Calculator – The Estimated Contract Calculator is used to assist you with determining a student's Contract Graduation Date and Maximum Time Frame. This option is explained in further detail in the Prospects section of this manual.

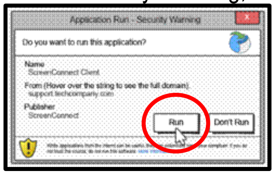
Help File – This link allows you to download a PDF copy of this manual.

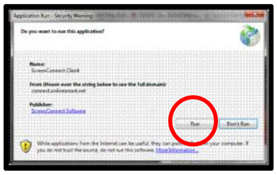
Knowledge Base – This link takes you to the Knowledge Base, which is explained in more detail here.

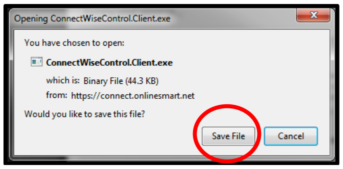
Remote Support – This link takes you Connect SMART (https://connect.onlinesmart.net/). This web page is used by SMART Support representatives to connect remotely to your computer for installations and troubleshooting. Follow these steps to get your Support rep connected:

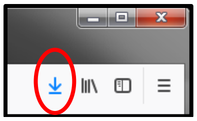
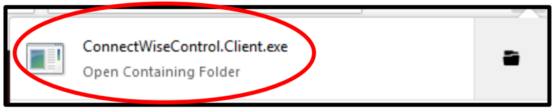
1. Enter the code provided by your support rep into the "Join with a code" box, and then select the arrow button.
   a. 

   then 

2. If you receive a Security Warning, select the Run button.
   a. 

   Do you want to run this application?
   Name
   ScreenConnect Client
   From (Hover over the string to see the full domain):
   support.techcompany.com
   Publisher
   ScreenConnect
   or 

   Do you want to run this application?
   Name:
   ScreenConnect Client
   From (Hover over the string below to see the full domain):
   connect.onlinesmart.net
   Publisher:
   ScreenConnect Software
3. Some browsers, such as Firefox, will only download the file without running it.
   a. Select Save File:
      i. 

      You have chosen to open:
      ConnectWiseControl.Client.exe
      which is: Binary File (44.3 KB)
      from: https://connect.onlinesmart.net
      Would you like to save this file?
   b. Select the download button or type Ctrl J on your keyboard:
      i. 
   c. Double click the downloaded file to run the connection software:
      i. 

Notifications

To view Notifications, select the Load Notifications link located in the upper right corner of the screen. Once selected, OnlineSMART will display the system notifications listed below. 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 system profile. From their profile, you can address the issue which you were notified about.

Not SAP – This notification table lists all active students who are not meeting your school's Satisfactory Academic Progress minimum requirements.

Approaching Evaluation – This notification table lists all students who are within 24 Scheduled or Actual hours of their next evaluation point. Whether students are evaluated by scheduled or actual hours, for this notification, is determined by the SAP Evaluation Rule, which is located under Administration > Basic Setup > School Academics.

In Default – This notification table lists all students who have been marked as In Default on the Financial Aid Worksheet.

R2T4 Not Run – This notification table lists all dropped students who have received federal financial aid, but have not had an R2T4 run for them.

Attendance During LOA – This notification table lists all active students who have an attendance entry (including absences) during a date range when they are scheduled to be on a Leave of Absence.

Attendance While Dropped – This notification table lists all dropped students who have an attendance entry (including absences) after their drop date.

Tickler Reports

Require Phone and Require Mail – These reports list all prospects that require follow up correspondence according to the tickler period set up in the Basic Setup section. The prospect will automatically be removed from this list after 5 days.

Loan Follow-up – This tickler report notification table lists all dropped or graduated students that require Loan Repayment Letters according to the tickler period set up in the Basic Setup section.

Personal Follow-ups – This tickler report notification table lists all prospects, students, and alumni that have a note in their profile with the Follow up box checked, for only the user specified in the note.

All Follow-Ups – This tickler report notification table lists all prospects, students, and alumni that have a note in their profile with the Follow up box checked, that are not associated with a specific user.

Internet Leads – This tickler report notification table lists all prospective students who filled out the Internet Prospect Import Form on your website.

SECTION 2: USER ADMINISTRATION

1. Select User Administration from the main menu on the left side of the screen.
2. You will be directed to the User Preferences page.

The User Preferences page allows you to: determine the default status setting when searching for students and prospects; change your user password; and, if you have the proper Role Access rights, you can enter the Company Level Administration section from this page.

USER PREFERENCES (Video)

1. Select an option in Student List Filter and/or the Prospect List Filter.
2. Click the Apply button in the lower right corner of the page.

Default Filter for Student and Prospect Searches

The Student List Filter and the Prospect List Filter allow you to select the default Filter when searching for a student or prospect. For example, if you select Active Students under the Student List Filter, then when you go to the Students section of OnlineSMART, and search for a student, the Filter will have Active Students automatically selected.

All People Selection Lists

The default setting for the “All People Selection Lists” is “Greater Performance” and we do not suggest changing this setting.

Change Password

1. Select User Administration from the main menu on the left of the screen to go to the User Preferences page.
2. Select the Change Password option.
3. A dialogue box will pop up and prompt you to change your password.
4. Enter your new password and confirm the new password, then select Ok.

Tips:

- *REMEMBER THIS PASSWORD. SMART Support or your system administrator cannot retrieve your password.*
- *Your system administrator can reset your password if needed.*

COMPANY LEVEL ADMINISTRATION

1. Select User Administration from the main menu on the left of the screen to go to the User Preferences page.
2. If you have the proper Role Access, then select User Rights.
3. You will be directed to the Company Level Administration site.
4. This site has only two menu options: Role Administration and User Rights.

ROLE ADMINISTRATION (Video)

The Role Administration page is a list of active roles available for assignment. From this page you can view the default roles, create new roles, and edit user created roles. The default roles on this page can only be viewed and not edited or deleted; however, the user created roles can be edited and deleted. Using roles allows administrators the ability to assign different levels of access to different users.

Viewing/Editing Custom Roles

1. From Company Level Administration, select Role Administration from the main menu on the left of the screen.
2. A list of all active roles will populate. Roles marked View are default roles and roles marked Edit are user created roles.
3. To view a role and its specific capabilities, select anywhere on the row of the Role you wish to view.
4. This will open a new window that shows the Role Name and Description
5. There are two tabs to view information: Navigation or Reports.
6. Navigation shows what part of OnlineSMART the role grants access to.
7. Reports shows what reports the role grants access to.
8. Select the school you are working in from the drop-down in order to see what is available and assigned to the role.
9. The left side of the window shows the list of Available roles and the right of the window shows the list of Assigned roles.
10. Exit this screen by selecting the X in the upper right corner of the window.

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 drop-down.
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. Refresh your browser window.
12. This role will now appear in your Role Administration list.

USER RIGHTS (Video)

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 password, 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 menu options on the left of the screen.
2. A list of all users will populate.
3. This page displays a table with Username, Last Name, First Name, and IsActive.

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.
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 drop-down list; 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 buttons to move the roles to the Modify Access box.
14. Once you have moved all of the roles that 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.

Tips:

- *SMART recommends using the first initial, last name format. Example: Robert Smith would be rsmith.*
- *Usernames cannot be edited in the future.*

Resetting a User's Password

1. Once inside the User Rights page, select the row for the user whose password you need to reset.
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.

Viewing/Editing 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. From the School Assignment tab, you can see which school(s) the user has access to. If your school has 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.
4. 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.
5. Once you have made a change to a user's assigned school, you will need to click on the Save School Assignment button.
6. 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.
7. 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.
8. Once you have made changes to the user's assigned roles, you will need to select Save from the top menu of the screen.
9. Exit this screen by selecting the X in the upper right corner of the window.

Tips:

- *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. Exit this screen by selecting the X in the upper right corner of the window.
6. Alternatively, you may select the Delete button, if you wish to delete the user.
7. A new window will open requesting you to confirm deletion
8. Select Ok.
9. The window will close once you confirm deletion of the user.

SECTION 3: ADMINISTRATION

1. Select Administration from the main menu on the left side of the screen.
2. The Administration menu option will display various sub-menu options.

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, your G.P.A., test weighting, and a variety of other vital calculations unique to your school.

These options are crucial in determining how OnlineSMART will work for your school. The information in these pages needs to be entered correctly in order for reports, calculations, and ledgers to meet your school's requirements. Generally, only a school administrator will have access to these options. SMART is not liable for incorrect entries.

1098-T ELECTRONIC FILING (Video)

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

From this page you can generate the electronic 1098-T file for submission to the IRS. The 1098-T Reports, in a printable format, are under Reports: Annual: 1098-T. 1098-T refers to the IRS Form 1098-T that a student receives to show 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 or includes the information when preparing their taxes.

Student payment information must be posted to the ledger correctly in order to pull correctly on the 1098-T. The information you type into these fields will not be saved, and will need to be retyped in the future. SMART does not have access to your school's IRS information; you will need to contact the IRS for this information. If you need to file a Replacement or Correction file, please contact SMART Support for further assistance. According to IRS regulations, please be sure to obtain students' social security number in writing.

Payment Year – When filing 1098-Ts, use the tax year for which you are reporting. For example, if the current year is 2019 then you would be filing 2018 taxes. The Payment Year you would choose in OnlineSMART would be 2016.

File Type – There are two filing types: Original and Correction. Select Original if you are generating the report for the first time or if you are generating a replacement file. Correction is only selected when generating a correction file.

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 (https://www.irs.gov/pub/irs-pdf/f4419.pdf) and download form 4419 (Application for Filing Information Returns Electronically-FIRE). Schools must apply for a TCC number by filling out and submitting an IRS Form 4419 at least 30 days prior to the date that returns are due. Once you have received a TCC number, you are ready to file. If you have not received your TCC within 45 days, contact the IRS.

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.

Contact Name, Phone, and Email – Enter the contact information for the person at your organization who files your 1098-T.

Payer Name Control – The Payer Name Control field will be the first four letters of the name your business files under.

Payments Received for Qualified Tuition and Related Expenses – Please leave this box checked.

Scholarships or Grants – Please leave this box checked.

Generate Export File – The Generate Export File button generates the 1098-T electronic file. You will be asked to name and save the file somewhere on your computer. This will be the file you upload electronically to the IRS FIRE website.

Tips:

- *Choose a name you will remember, such as 2019 1098T.*
- *Be sure to save it somewhere you will remember, like your desktop.*
- *Do not open this file once it is saved because the formatting may 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 generate formatted 1098-T forms directly from the software for your school's records and to send to your students.

1. From the main menu on the left of the screen, select Reports;
    a. Select the Report Type – Standard;
    b. Open the Annual folder;
    c. Open the 1098T folder;
    d. Open the appropriate year. Example: 2019.
2. Select the version of the report you wish to run. 1098-T 2019 is the report that will allow you to print the forms for students.
3. 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 filing electronically. Unless you have had special circumstances in the past, select NO.
4. For the main report, select "Which Copy" and whether or not to "Print to Form"
    a. The "Which Copy" option allows you to select which type of 1098-T to generate, either Copy B, which is for your students, or Copy C, which is for your records.
    b. The "Print to Form" option allows you to print just the student data onto paper that has the 1098-T form preprinted on it. You must purchase the blank, preprinted forms to use this option. Due to the differences in printer setups, it might be tricky to get the printout to line up exactly with the blank 1098-T form.
5. Select the View Report button in the upper right corner.
6. Now you will go to the middle of the report header and select the blue export button. Select PDF from the drop-down list.
7. Open or Save the report file, depending on your browser settings.

Tips:

- ➢ *Your school does not need to purchase 1098-T forms. All of the information is included in the report.*
- ➢ *We do recommend purchasing 1098-T envelopes if you will be mailing these to students.*
- ➢ *According to IRS regulations, please be sure to obtain students' social security number in writing.*

ADMISSION REPRESENTATIVES (Video)

1. Select Administration from the main menu on the left side of the screen.
2. Select Admission Representatives.
3. You will automatically be directed to 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 from the drop-down box when editing a prospect or student profile. This drop-down 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. SMART advises editing the names of admissions representatives only to correct spelling or for name changes. Representatives cannot be deleted to safeguard past student data.

Adding an Admissions Representative to this Page

1. Enter the representative's first and last name.
2. Select the Save button.

BASIC SETUP (Video)

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 School Settings page.

The School Settings page is where you will enter your school's basic information. It is organized into six different tabs: School Contact, School Licenses, School Options, School Features, School Academics, and Tickler Period. This portion of the software is extremely important to the functionality of OnlineSMART. Please follow our instructions carefully throughout the School Settings page to ensure that your information is setup correctly with your school's specific parameters and required percent standards. If data on this page is entered incorrectly, students' SAP and other calculations may not be accurate.

School Contact 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 School Contact tab on the School Settings page.

The School Contact tab is where you will store the school owner's name, the school's address, city, state, zip code, region, and phone number. This address information will be displayed on most of the reports generated from OnlineSMART.

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 School Settings page.
4. From here, select 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: License Number, Pell ID (needed if school is to import ISIRs), Accreditation Number, OPE ID, Direct Loan G-Code, DUNS Number, and TIN Number.

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 School Settings page.
4. From here, select the School Options tab.

The School Options tab is where you can adjust the following settings: Prospect Creation, Load ISIR Data, Destination Point ID (TG#), and Current Processing Year. Please read carefully through the instructions in this section when setting up your school parameters.

Entering Information in the School Options Tab

Enable Title IV Reminders – This option is set by SMART and should not be changed.

Enable Title IV Hold on Ledger – This option is set by SMART and should not be changed.

Interval (Days): – This option is set by SMART and should not be changed.

Prospect Creation – This section determines the information that is necessary to create a new prospect profile. Name/Phone is the default setting. If you change the setting to Name\Address then when you create a new prospect the required information will be name and address rather than name and phone number.

Destination Point ID (TG#) – A destination point is the transmitter of FSA data in the Electronic Data Exchange, for the U.S. Department of Education. ISIRs and COD data and report information are sent to the Destination Point through the Student Aid Internet Gateway (SAIG).

Load ISIR Data – This field is to select how you want your ISIR data to load to students' profiles. If you are uploading ISIRs into SMART, then select Automatically. By doing so, this will update currently existing prospect or student profiles or create a new prospect profile if none currently exists. Select Manually if you are going to manually enter ISIR information. Select None if your school elects not to load ISIR data into students' profiles.

Current Processing Year – This sets the default year for new entries on the Financial Aid Worksheet and Ledger. 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, 2018 to June 30, 2019 you would use 2018/2019 as the current processing year. New entries on the Financial Aid Worksheet and Ledger will now automatically default to 2019. You should update this setting at the beginning of each year.

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 School Settings page.
4. From here, select 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.

Lab Hours Included – Selecting this option will reveal the Credit/Hours column on the Lab Grades page of a student's profile. This allows you to enter an associated credit or hour value for the lab grade you are entering. You should check your state department of education requirements and/or your accrediting body to determine whether your school is required to keep track of lab hours associated with labs performed. This value can only be tracked using the Academic Transcript With Credits reports.

Include SSN on Student Reports – Selecting this option will reveal students' social security number on student reports.

Include Last 4 SSN Digits on Student Reports – This option becomes available to select if the "Include SSN on Student Reports" option is selected. Selecting this option will show only the last 4 digits of students' social security number on student reports.

Tips:

- *SMART does not recommend including SSNs on reports, or only displaying the last 4 digits.*

Attendance in Minutes – This option will allow you to track attendance down to the minute. When this option is selected, a field for Hours and a field for Minutes are revealed on students' attendance page. Any number added to the Hours field will be automatically broken down into whole hours, and any partial hours will be converted to minutes and added to the Minutes field. For example, if you enter 5.5 in the Hours field, this will be broken down to 5 hours and 30 minutes.

If you also enter a value to the Minutes field, any minutes converted from the hours field will be added to this value. For example, if you enter 5.5 in the Hours field and then enter 10 in the Minutes field for the same entry, it will be broken down to 5 hours and 40 minutes. This option cannot be selected if the Attendance Breakdown option is selected. This option does not affect any reports.

Tips:

- *If your school utilizes the SMARTTime time clock system, time will be converted from hours to a decimal value during the close out process. When you select the Attendance in Minutes option, the decimal value from SMARTTime will be converted back to hours and minutes, which may cause a discrepancy in actual time.*

Attendance Breakdown – The Attendance Breakdown option allows you to track where a student's time was spent each day. If you select the Attendance Breakdown option, the following fields will be added to students' attendance page: Demo Hours, Non Clinic Hours, and Clinic Hours. This option cannot be selected if the Attendance in Minutes option is selected. The Attendance Breakdown information is currently not reflected on any reports.

Tips:

- *SMART does not recommend using this feature if you are using SMARTTime for time and attendance tracking.*

Overwrite Existing Referral Code for Existing Leads – This option is set by SMART and should not be changed.

Allow Ledger Editing – Selecting this option allows you to edit ledger entries on students' ledger page. Once selected, the Edit link will appear in the last column on the right. Selecting the Edit button will take you to the ledger entry information where you can edit any information for that entry, with the exception of the Disbursement Date and Post Date.

Include Hours and Credits When Entering Test Grades – If your school is required to track hours and credits when grading tests, you can select this setting. Selecting this setting will reveal the Hours field and Credits field on students' grades page. The Credits field value can be tracked using the Academic Transcript With Credits reports.

Overwrite Address for Existing Leads – This option is set by SMART and should not be changed.

Overwrite Phone for Existing Leads – This option is set by SMART and should not be changed.

Overwrite Demographic Information for Existing Leads – This option is set by SMART and should not be changed.

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.

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 School Settings page.
4. From here, select the School Academics tab.

The School Academics tab is where you will set your school's required attendance percentage, grade point average (GPA) percent standards, and your school's grade weighting scale. In addition, you can enter the administrator's name and title that you would like to appear on certain reports, such as the Academic Transcript. These options are crucial in determining GPA, attendance percentage, and satisfactory academic progress (SAP). Information not entered correctly will cause calculations in students' profiles and on your reports to be incorrect. SMART is not liable for incorrect entries.

Recalc Students – 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.

Minimum GPA Value – This field is where you will record your school's required minimum GPA, which is a component of SAP. Without this field completed, OnlineSMART will not know at what point a student is not meeting their minimum requirements.

Minimum Attendance % – This field is where you will record your school's required Minimum Attendance %, which is a component of SAP. Without this field completed, OnlineSMART will not know at what point a student is not meeting their minimum requirements.

Perform Alternate GPA Calculation– This option is set by SMART and should not be changed.

Grade Weighting-Test Field – This field determines what percentage of weight is given to Test Definitions, which have their Type set as Theory, when calculating a student's GPA.

Grade Weighting-Major Test/Lab – This field determines what percentage of weight is given to Test Definitions and Lab Definitions, which have their Type set as Major, when calculating a student's GPA.

Grade Weighting-Labs – This field determines what percentage of weight is given to Lab Definitions, which have their Type set as Lab, when calculating a student's GPA.

Test + Major Test + Lab Weighting – This will be the total of the 3 grade weighting options. The total of the 3 should equal 100.

Include Signature on Transcript – 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.

Include GPA Legend Box (Typically Grayed Out) – This option is set by SMART and should not be changed.

Signature – 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.

Title – This field allows you to type the title of the school official, such as Instructor, Director, or School Official, when choosing to include a signature on an academic transcript.

Grade Weighting

There are three different grade types in OnlineSMART: Tests, Majors (which can be a test or a lab), and Labs. The grade weighting section allows you to assign a value to each grade type. This value is a percentage out of 100. Actually, the system allows you to assign a value to Tests and Majors, and then it automatically assigns the remaining amount to Labs, so that the sum of all three categories equals 100. The system multiplies each percentage value by the average of the respective grade type, and then adds all of the grade types together to get the total GPA value for the student.

For example, a school is set up for 50% for Tests, 25% for Majors, and 25% for Labs. A student at this school receives an average Test value of 88, an average Major value of 95, and an average lab value of 79. The Test average (88) is multiplied by the grade weighting (50% or .5) for a value of 44. The Majors average (95) is multiplied by the grade weighting (25% or .25) for a value of 23.75. The Labs average (79) is multiplied by the grade weighting (25% or .25) for a value of 19.75. The three grade weights (44, 23.75, and 19.75) are then added together to get a GPA score of 87.5 for this student.

Tickler Period 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 School Settings page.
4. From here, select 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.

Prospect Tracking DAYS to Follow Up

This section of the Tickler Period tab determines when a prospect will be added to the Require Phone or Require Mail Tickler Report in the Notifications section. You can enter three different periods for when a prospect will be added to the Require Phone and Require Mail list. The value entered into a box represents the number of days after a prospect's Initial Contact date when a prospect will be added to the corresponding list. Once a prospect has reached a Tickler Period and has been added to a list, they will remain on the list for five days and then they will be automatically removed from the list until the next tickler period. Once a prospect is enrolled to a student, they will be removed from the list, if they are on it.

For example, if your first Phone Tickler Period is set to five days, and you have a prospect with an Initial Contact date of 6/20/2016, then on 6/25/2016 that prospect will be added to the Require Phone list. That prospect will then be automatically removed from the list on 7/1/2016.

Loan Repayment Letters MONTHS After Drop/Graduation

This section of the Tickler Period tab allows you to determine when you would like to add students to the Loan Follow-up Tickler Report in the Notifications section. When you enter a number into a field in this section, students who are dropped or graduated will appear on the Loan Follow-up Tickler Report that number of months past their Drop Determined date or Actual Graduation date. Then, like the Require Phone and Require Mail lists, the student will remain on the Loan Follow-up list for five days and then automatically be removed from the list.

For example, if you set up this section in your Tickler Period tab for each month (1-5 in the corresponding fields), then if a student drops from your school in June, they will appear on the Loan Follow-up list each month for five months after June. Each month, the student will remain on the list for five days and then be removed from the list until the next tickler period comes around.

CODES (Video)

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

The Codes page allows you to create codes that are used throughout OnlineSMART. These codes are mainly used to populate drop-down lists, and some are also used as filters when querying a report. This page is organized into seven different tabs: Admission Test Codes, Contract Codes, Drop Codes, Employment Codes, Pass-Place Codes, Referral Codes, and Tracking Codes.

Admission Test Codes Tab – The Admission Test Codes tab is where you can input the names of admissions tests that prospects or students may be required to take. This information will then be used to populate a drop-down list in the Admissions Test tab under a prospect or student's profile. To create a new code, enter a CodeName and a Description in the blank fields, then select the Save button to the right of the blank fields. These codes are entirely user defined and may be edited or deleted by the user.

Contract Codes Tab – The Contract Codes tab is where you can enter any labels that you wish to assign to students regarding the type of contract they have. Entering the codes on this tab will populate the Contract Code drop-down list in the student's Financial tab. To create a new Contract Code, enter a Name and a Description in the blank fields, then select the Save button to the right of the blank fields. Once a code is created, the DateCreated field will automatically populate with the current date. These codes are entirely user defined and may be edited by the user, but once created, Contract Codes cannot be deleted.

Drop Codes Tab – The Drop Codes tab is used for listing all of the reasons why a student can drop out of your institution. This tab is pre-populated with a list of standard Drop Codes. These standard Drop Codes cannot be edited or deleted. We suggest using the standard drop codes as they are instrumental in determining exclusions for some compliance reports. If you wish to create a new Drop Code, enter a Code and a Description in the blank fields, then select the Save button to the right of the blank fields. User created Drop Codes can be edited, but they cannot be deleted. Most reports can be queried by Drop Code. The items listed on this tab populate the drop-down list in the Dropped section of a student's profile. SMART does not recommend adding Drop Codes.

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. To create a new Employment Code, enter an Abbreviation and a Description in the blank fields, then select the Save button to the right of the blank fields. Once a code is created, the DateCreated field will automatically populate with the current date. Any codes that you list here will be available in a drop-down list in the Alumni profiles to assign to each alumnus. These codes are entirely user defined and may be edited by the user, but once created Employment Codes cannot be deleted. All alumni reports can be queried by Employment Codes.

Pass-Place Codes Tab – The Pass-Place Codes are used to track your students' status during the licensing/certification process. Pass-Place data may be required to be reported to agencies or accrediting bodies. This tab is pre-populated with a list of standard Pass-Place Codes and you cannot add to, edit or delete this list. This list populates the Pass drop-down list in an alumnus' profile. All alumni reports can be queried by Pass-Place Codes.

Referral Codes Tab – The Referral Codes tab is used to list all Referral Codes that your institution is required, or wishes, to track. This tab is pre-populated with a list of standard Referral Codes that cannot be edited or deleted. You can add up to 6 additional referral codes. To create a new Referral Code, enter a Code (you may only use the codes U1 through U6), a Name, Cost Per Lead, Cost Measure, and select if it is EIL Default. Select the Save button on the right side of the row when you are finished. This list populates the drop-down list on the personal tab of a prospect/student's profile. Most reports can be queried by Referral Code.

Tracking Codes Tab – The Tracking Codes tab is a way for you to create your own list of labels that you can assign to prospects or students. Entering the codes on this tab will populate the Tracking Code drop-down list in a prospect or student's Personal tab. To create a new Tracking Code, enter a Name and a Description in the blank fields, then select the Save button to the right of the blank fields. Once a code is created, the DateCreated field will automatically populate with the current date. These codes are entirely user defined and may be edited by the user, but once created, Tracking Codes cannot be deleted. Most reports can be queried by Tracking Code.

COURSE (Video)

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

The Course page is where you can create and adjust the settings of all of the courses offered at your institution. The courses created on this page populate the Course drop-down list on prospects and students' Academics tab. Once you assign a course to a prospect/student, their profile will be updated with information found on this Course page. Information regarding the course will become readily available in their profile under the Academics tab and the Financial tab.

SMART does NOT recommend creating multiple types of the same course. For example, do not create a full time Cosmetology course and a part time Cosmetology course. 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. Adding additional courses for schedule differences may cause your data to be inaccurate in various annual reports that are submitted to accrediting bodies and to the U.S. Department of Education.

Adding a New Course

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.
3. Enter the description in the Description field. Example: Cos.
    a. Use a Name and Description that is different from all of your other courses.

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 system for labeling and identifying different types of educational programs. This allows for an efficient and standardized method of tracking, assessing, and reporting information. A school's programs are listed by CIP Code on their ECAR and on IPEDS.
6. Start of Week lists the day of the week this course normally starts on. Select the drop-down list for the Start of Week and select the appropriate day. This is a general information field for this course page and is not tracked or represented on reports.
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 or 4 credits.
8. Select Save from the top menu to save the course.
9. Select the course you just created from the All Courses drop-down list.
10. Enter the program costs in the table on the Contract/Maintenance Figures tab.
    a. Determine how your school processes student payments (Payment Periods, Academic Years, or Full Upfront Payment). This will determine how many rows you will create on this table and the tuition amounts in each row. Please consult your administrator if you are uncertain about this information. SMART staff will not know this information and will be unable to advise you.
    b. Enter 1 in the blank row in the Line Number field. Do not start this number with a zero, for example 01.
    c. Enter the tuition in the Tuition field. If using pay periods, enter the tuition for the first pay period only. For example, if the total tuition for a course is $8000 and the course is divided evenly into four pay periods, then the tuition for each pay period would be $2000. So you would enter 2000 for the tuition field in this first pay period row.
    d. Enter any applicable, contract fees in the Fees field. For example, a school might charge a registration fee and/or an enrollment fee.
    e. Enter kit and books charges in the Kit/Books field. If kits are taxed, and those taxes are part of the contract amount, then add that amount to the Kit/Books cost.
    f. Enter any other applicable, contractual charges in the Other field. Anything entered in this field will not be calculated on the 1098-Ts.
    g. The Contract field is automatically calculated by adding the above figures together for that row.
    h. Enter any non-contractual cost of attendance amounts associated with this course in the Maintenance field. The amount in this field does not affect the contract balance and is not represented on the ledger.
    i. Select the SAVE button on the right side of the pay period row (not the Save button at the top of the page).
    j. Repeat these steps for each pay period in the course.

Tips:

- *After entering each pay period as a row, add at least one additional blank row to account for reenrolled students. For example, if your course has four pay periods, then you would add four rows for each pay period and then add at least a fifth blank row.*

11. Select the Hours/Credits Per Pay Periods tab.
    a. The number of rows and the Line Number column on this table automatically populate to correspond to the table on the Contract/Maintenance Figures tab. However, only the first row of this table will be used.
    b. Select the Edit link for the first row of this table.
    c. Enter the total hours or credits of the course in the Contract Hours/Credits field. This should equal the Hours/Credits field next to the Description field.
    d. Enter the hours in each pay period starting in the Period 1 field. For example, if a course is 1800 hours and the course is divided evenly into four pay periods, then in Period 1 through Period 4 you would enter 450. All of the numbers entered into the Period fields should add up to equal the number entered in the Contract Hours/Credits field.
    e. Select the Update option on the right side of the first row when you are finished entering all of the periods.

Tips:

- *This information is used to populate the Period drop-down list when posting a new ledger entry to the Ledger page.*
- *In addition, this information is used for certain reports, such as the Evaluation Report.*

Editing an Existing Course

Once a course has been created, you can edit any information except the Name and Description of the course. Courses cannot be deleted. A good example of the need to edit an existing course would be an increase in tuition. 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.

Tips:

- *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. Adding additional courses may cause inaccuracies on any annual reports that must be turned in to accrediting agencies and to the U.S. Department of Education.*

1. Select the course you want to edit from the All Courses drop-down list .
2. After editing Hours/Credits, CIP Code, Start of Week, and/or Allow Partial Attempted Credits, select the Save button at the top of the page.
3. If you need to edit information in the Contract/Maintenance Figures table or the Hours/Credits Per Pay Periods table, use the Edit and Update links for each row that you edit.
4. If you need to add a new row to the Contact/Maintenance Figures table, enter the information and select the Save button for the new row.

DOCUMENTS DEFINITIONS (Video)

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

The Documents Definitions page is where you can create default names for documents that are uploaded to a prospect or student profile. This list of names will populate the Recommended Type drop-down list on the Documents page of a prospect or student. This allows you to quickly select a name for commonly uploaded documents, instead of having to type the name.

Adding a Document Definition

1. A blank line will appear under any previously listed definitions.
2. Enter the name of the document in the first field, such as FAFSA or Driver License.
3. Enter the description in the second field, such as 2018/2019 Free Application for Federal Student Aid.
4. Select Save on the right end of the row.
5. The Date Created column will automatically populate with the current date once you select the Save option.

FEDERAL CASH ACCOUNT (Video)

1. Select Administration from the main menu on the left side of the screen.
2. Select Federal Cash Account.
3. You will automatically be directed to the Federal Cash Account (GAPS) page.

The Federal Cash Account page helps your 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) and the PR Award No.

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 drop-down list 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 drop-down list, 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.

FISCAL YEARS (AWARD YEARS) (Video)

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

The purpose of the Fiscal Years page is to give each institution the option of pre-listing 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.

Adding a New Fiscal Year

1. Enter the Year in the first field.
2. Enter the Abbreviation of the fiscal year in the second. For example: The year is 2019, the abbreviation could be 19.
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.

Editing a Fiscal Year

1. Select the Edit option on the right side of the row you wish to change.
2. Enter the most recent data in the related fields.
3. Select the Update option located to the right of the row you are currently editing.

GUARANTORS (Video)

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

The purpose of the Guarantors page is to keep a list of approved guarantors used at your institution. This list populates the Guarantor drop-down list in the Loan Contacts section of a student's Contacts page. This helps you keep track of such information and allows you to easily provide your student with a contact name regarding their student loans. You can also find this information for students on the Loan Contact report.

New Guarantors Information

1. Enter the Name.
2. Enter the Description.
3. Select Save to the right of the row you are entering.
4. The DateCreated field will automatically populate with the current date.

IMPORT TOOL (Video)

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

The Import Tool is primarily designed for schools that are converting their data records from another software solution. 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 SMART Excel spreadsheet template for your Prospect, Student, or Alumni 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, to be used as a reference when running the Import Tool. If you are copying records from another data file, check to make sure that that there no extra spaces before and after the information that is copied. If you receive an error message when importing, check to make sure that the records have not imported before you attempt to correct and re-import. Most of the time, some of the students will import the first time, so if you import the same file again those student will be duplicated.

Using the Excel Import Template

1. Select the appropriate Import Template; Prospect, Student, or Alumni.
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. Non-highlighted fields are optional. Each column is designated for specific information. If you do not have information for a column, 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.
6. Save the completed file to your computer.

Importing past attendance will result in a single entry of total hours. In order to have students' attendance percentage to calculate, they will need to have their schedules filled out or have a bulk schedule entered on their last date of attendance prior to transferring.

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.

ISIR ADMINSTRATION (Video)

1. Select Administration from the main menu on the left side of the screen.
2. Select ISIR Administration.
3. You will automatically be directed to 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 the original, raw data format.
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.
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.

Tips:

- *If the student does not appear in the detail box, you will need to select "Run Detail Report" and search by last name.*

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. Selecting Clear History in the ISIR Administration page will clear the list of ISIRs you have uploaded already. Before doing this, make sure you have a printed copy of the ISIRs in that list.

Utilizing the ISIR Information

This information will be updated on the ISIR tab under the prospect's or student's profile. The fields populated from the ISIR file 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).

LAB DEFINITIONS (Video)

1. Select Administration from the main menu on the left side of the screen.
2. Select Lab Definitions.
3. You will automatically be directed to 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 during initial setup, this will save your employees time when entering lab grades for all students. Once lab definitions have been created, a drop-down list 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:

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

		P.P.				

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.

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

LENDERS (Video)

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

The Lenders page is used to create lenders and 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.

MESSAGING (Video)

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

This feature was added to give schools the ability to mass text and email prospects, students, and alumni from OnlineSMART.

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 Alumni, select students and the filter Graduated.)
6. Create the subject and message. Then select Send at the bottom of the screen.

A report that can assist you with messaging 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 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.

This feature does not support attachments or pictures, and students are not able to reply to these messages. Messages are sent from "donotreply@onlinesmart.net". Text messages have a maximum length of 135 characters, including the subject. Email messages do not have a maximum length.

Tips:
- *Text and email messages are not saved. If you would like a copy of a sent message, one option is to create a template student and include an email address and cell phone number where you would like a copy of your messages to go.*

PREVIOUS SCHOOLS (Video)

1. Select Administration from the main menu on the left side of the screen.
2. Select Previous Schools.
3. You will automatically be directed to 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 is stored on the Personal tab of the student profile.

PROGRAMS (Video)

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

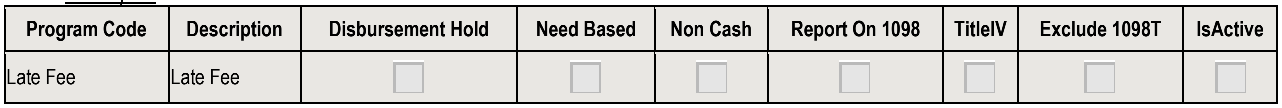
The Programs page is where you will enter all programs you wish to use on the ledger. The program will identify the source of monies that are posted to a student ledger. For example: Pell Grant, Direct Subsidized Loan, or PLUS Loan. This is important to many departments of a school, specifically the 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 because 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 shown below. Please contact a SMART representative before selecting any boxes.

Tips:

- *Any monies posted to user 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
Late Fee	Late Fee	☐	☐	☐	☐	☐	☐	☐

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 drop-down box.

SCHOOL CALENDAR (Video)

1. Select Administration from the main menu on the left side of the screen.
2. Select School Calendar.
3. You will automatically be directed to 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. It is important to keep the school calendar up to date prior to creating schedules for your students. 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. To change months, select the underlined month link on the right or left side of the current month.

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 No School check box.
4. Select the Special check box if you would like to write a description in the Notes field 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 wrote a description in the Notes field.

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 you will see the days you selected 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. To change months, select the underlined month link on the right or left side of the current month.
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. To change months, select the underlined month link on the right or left side of the current month.
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 of 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.

TEST DEFINITIONS (Video)

1. Select Administration from the main menu on the left side of the screen.
2. Select Test Definitions.
3. You will automatically be directed to 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 drop-down list 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. 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: Theory or Major.
3. Select the appropriate course for your entry.
4. Enter the number Credits for the Theory entry. For clock hour schools, enter a zero here.
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

SECTION 4: PROSPECTS (Video)

1. Select Prospects from the main menu on the left side of the screen.
2. This will show a sub-menu listing of: Financial Aid Worksheet, New Prospect, Profiles, Prospect Documents, and Single Prospect Ledger.
3. Select New Prospect if you are entering a new prospect.
4. Select Profiles if you are searching for an existing prospect's profile.
5. 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.
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 that includes all of their personal information; from here you can view the Financial Aid Worksheet, Prospect Documents, or Single Prospect Ledger as well.

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 of the 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 school's 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 the 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.

PERSONAL TAB (Video)

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.

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 prospects individually using the Email link 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 prospects' demographic information. This information is needed for audits, and for reporting to a state board and/or accreditation agency. 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.

FLAGS TAB (Video) & NOTES TAB (Video)

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 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.

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.

ACADEMICS TAB (Video)

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 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 drop-down 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 the prospect's Contract Amount, Hours/Credits, and also the EnrollmentPeriod table on the Financial tab. 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.

Tips:

- *Once you enroll this prospect to a student these items cannot 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.*
- *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 the Messaging Prospect List for the date and only those prospects would appear on the list.

FINANCIAL TAB (Video)

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 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 tab automatically populates with the EnrollmentPeriod table once a course is selected for a prospect. All of the fields are configured when you develop your course in the Administration section. Each row represents an enrollment period, the different costs associated with that period, and the contract hours associated with that 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 is the total of any fee associated with the contract amount for that course, such as enrollment, registration, or application fees. 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. Editing this information will update the ledger and change your contract balance for this prospect.

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.

ISIR TAB (Institutional Student Information Report) (Video)

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.

P-ISIR TAB (Dependent Student)

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.

ADMISSION TESTS TAB (Video)

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 matching 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 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 list 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 drop-down list.
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.

PROSPECT DOCUMENTS (Video)

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 matching 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 Documents from the top menu.

OR

1. Select Prospects from the main menu on the left side of the screen.
2. Select the Prospect Documents.
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 matching your search criteria.
6. Select the prospect's profile you wish to work in. You will be directed to that prospect's 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. 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 drop-down in Recommended Type. The options in this drop-down 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.

FINANCIAL AID WORKSHEET (Fin Aid) (Video)

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 Fin Aid from the top menu.

OR

1. Select Prospects from the main menu on the left side of the screen.
2. Select Financial Aid Worksheet.
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 matching your search criteria.
6. Select the prospect's profile you wish to work in. You will be directed to that prospect's Financial Aid Worksheet (Fin Aid).

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 drop-down.
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 drop-down 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 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 drop-down 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 will show in the Remaining field.

Choose the later year in the current award year. For example: for 2018/2019, select 2019 for the year. Remember that the pay period, the year, and the program code assigned when setting up the award must match the posting on the ledger. If these three pieces of information do not match, you will not see the Disbursed and Remaining fields update with the correct information.

1. Check the box under Need Based if the specific award you are entering is need based.
2. 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. To remove the flag, uncheck the box and save. If you do not check the Title IV eligible box, then when someone is posting to the ledger they will not see any Title IV programs listed in the program drop-down list. 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 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 will automatically set the flag. To remove the flag, uncheck the box and select 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 U.S. Department of Education. 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 (and PISIR tab) when the ISIR has been imported. 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 providing a student with 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 to 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 drop-down box next to Verification. The options are: Not Required, Accurate, Reprocessed, Tolerance, W/O Documentation, and Selected, Not Verif. This information is obtained from the U. S. Department of Education, or your third party servicer.

SINGLE PROSPECT LEDGER (Video)

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 matching 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 Ledger from the top menu.

OR

1. Select Ledgers from the main menu on the left side of the screen.
2. Select Single Prospect Ledger.
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 matching your search criteria.
6. Select the prospect's profile you wish to work in. You will be directed to that prospect's Ledger page.

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. Ledger Types and Allocations are crucial to how information is directed throughout SMART. The Ledger page will be covered in-depth in the Student Ledger section of this manual. 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.
3. Select Type: CASH or CARD- CASH Ledger Type is used for cash, money orders, checks, agencies, scholarships, state grants, Sallie Mae Career Training loans, and other alternative loans. CARD Ledger Type 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.

Editing an Existing Ledger Entry

1. From the main Ledger screen select Edit on the right side of the entry you wish to edit.
2. 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.

In order to edit ledger entries, Allow Ledger Editing must be enabled. under Administration: Basic Setup: School Features.

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 it 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 balance of zero, you do not anticipate any more monies coming in on this prospect, and/or do not want any other items to be posted to the 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.

INTERNET PROSPECT IMPORT FORM (Video)

The Internet Prospect Import Form is a form that is designed to be embedded directly into the HTML of your existing webpage. When a potential prospect fills out the form on your website and selects the Submit button, the information is sent to OnlineSMART and a Prospect profile is automatically generated. In addition, the new Prospect profile is listed on the Internet Leads page found under the Notifications section on your school's OnlineSMART Home page. This form will need to be integrated into your website by your web developer.

Settings For Prospect Import Form

The Internet Prospect Import Form has five fields are that are required fields: First Name, Last Name, Email, Cell Phone, and School. If you only have one School, then that option can be hidden and the student will not have to make that selection. In addition to those five options, there are five additional fields that that are displayed: Address, Cell Phone Carrier, School Drop Down, Referral Code, and the Comments box. If you would like to remove any of those additional fields contact, SMART Support and they can deactivate them.

Other Features Of The Internet Prospect Import Form

There are a couple of other features that go along with the Internet Prospect Import Form.

1. You can now enter an email address in Administration: Basic Setup: School Contact: Email Address. Once an email address is entered, a notification email is sent to that email address whenever a prospect form is submitted. This email address is used only for the purpose of the Internet Prospect Import Form.
2. Another feature of the Internet Prospect Import Form is that new internet prospects automatically populate to the Internet Leads Notification list located under the Notifications section from the Home screen. Once the First Contact date is filled in on the prospect's Academics tab, or the prospect is enrolled to a student, then they will be removed from this notification list.

Web Developer Instructions

1. Copy the embed code in the attached Notepad document, and place it inside the HTML on your page at the point where you would like the embedded form to appear. The height of the iFrame will adjust automatically to be as tall as it needs to be. The width will automatically conform to the parent container. Typical containers are Divs or Tables. We suggest a minimum width of 350px (for the parent container) in order to maintain the correct format.
2. You will need to include the full embed code including the javascript that was sent to you. If anything is left out of the form, it will not function properly.
3. The form should now be viewable from your webpage and ready to use; no other steps are required. You should adjust the CSS of the parent container(s) in order to make it conform to the style of the rest of your page.
4. There are optional settings available to change the background color and the font color of the form. You can either use a HTML Color Name or a Hex color. In order to use a Hex color, you must URL encode the # symbol to "%23". For example, this would make the background color of the form use #c0c0c0 as the background: &BackgroundColor=%23c0c0c0.
    a. Background Color: add "&BackgroundColor={your color}" to the URL inside the iFrame "src" element in the HTML. Replace the {your color} text with whatever color you would like the background to be.
        i. Example: src='https://portal.onlinesmart.net/ProspectForm/?C=yHFXsf37QQ8TEd**&BackgroundColor=Red**'
    b. Font Color: add "&FontColor={your color}" to the URL inside the iFrame "src" element in the HTML. Replace the {your color} text with whatever color you would like the font to be.
        ii. Example: src='https://portal.onlinesmart.net/ProspectForm/?C=yHFX3sf7QQ8TEd**&FontColor=%23006600**'
5. This link is a full list of the HTML Color Names supported by all browsers: http://www.w3schools.com/colors/colors_names.asp.

ENROLLING A PROSPECT TO A STUDENT (Video)

1. From a prospect's profile, in the prospect's Details section, select the Enroll button located at the top of the screen.
    a. This button will be grayed out if you do not have the prospect's name, phone number, social security number, and a course selected.
    b. 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.
    a. Select Enrollment Type, Class, Length, and Contract Grad Date for this prospect who is becoming a student.
    b. 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.
    a. Do not select the Save button located at the top of the screen.

Entering a Length In Student Profile

When enrolling a prospect to a student, you are required to enter a Length in either Weeks or Months. The value entered in this field should correspond to your school's published program length of the course that the student is signed up for. If you school publishes different program lengths, for example, a part time program length and a full time program length, then be sure to enter the correct program length. This field is very important for annual reports, such as IPEDS.

Entering a Contract Grad Date

The Contract Grad Date should be calculated according to the total contract hours for the course and the student's schedule. The date entered should correspond to the date on the student's enrollment agreement.

ESTIMATED CONTRACT CALCULATOR (Video)

To assist in calculating a student's Contract Graduation Date, there is a tool in the Help section called the Estimated Contract Calculator. With this tool, you will be able to calculate the Contract Graduation Date and the Maximum Time Frame. You can also calculate those dates to account for any school closure days. If you have a method for calculating these dates, then you can use this tool to double check your own calculation.

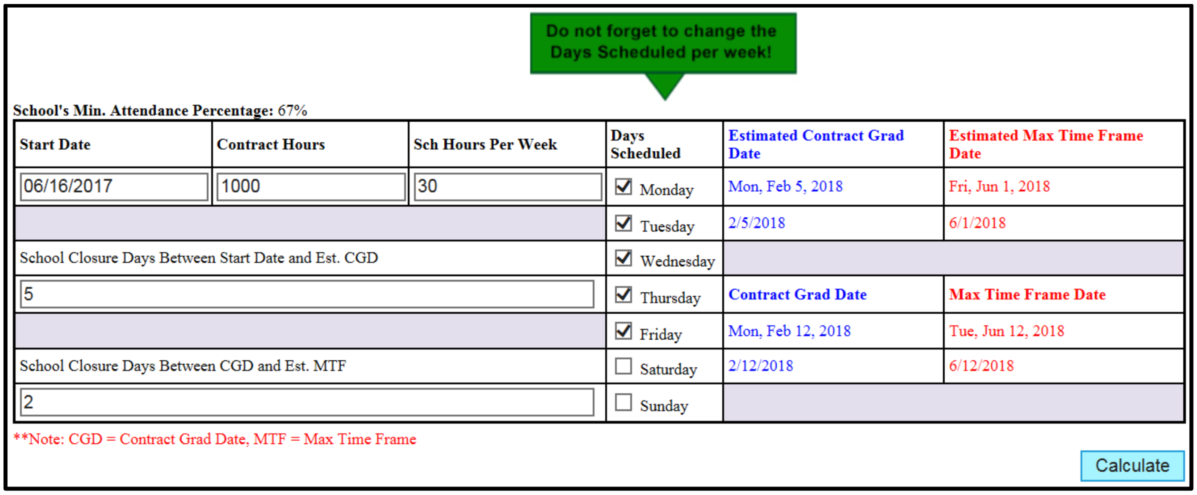
1. Select Help from the Main Menu.
2. Select Estimated Contract Calculator from the sub-menu.
3. First the Estimated Contract Calculator will pop-up in a new browser tab or window, and then a mini pop-up window will appear regarding the Terms of this calculator.
4. Select Yes if you agree to the terms and wish to continue.
5. Follow the instructions listed on the web page:

To Calculate Contract Grad Date for a new student follow Steps 1-5:

1. Check mark the days of the week the student is scheduled
2. Input Start Date
3. Input Contract Hours
4. Input Hours Scheduled per week
5. Click Calculate Button

To Include School Closure Days, Complete Step 6:

6. Print the School Calendar Date Range Report, (from Start Date to Estimated Max Time Frame Date) and Input school closure days as indicated below.
7. Click Calculate Button



Do not forget to change the Days Scheduled per week!

School's Min. Attendance Percentage: 67%

Start Date	Contract Hours	Sch Hours Per Week	Days Scheduled	Estimated Contract Grad Date	Estimated Max Time Frame Date
06/16/2017	1000	30	☑ Monday	Mon, Feb 5, 2018	Fri, Jun 1, 2018
			☑ Tuesday	2/5/2018	6/1/2018
School Closure Days Between Start Date and Est. CGD			☑ Wednesday		
5			☑ Thursday	Contract Grad Date	Max Time Frame Date
			☑ Friday	Mon, Feb 12, 2018	Tue, Jun 12, 2018
School Closure Days Between CGD and Est. MTF			☐ Saturday	2/12/2018	6/12/2018
2			☐ Sunday		

**Note: CGD = Contract Grad Date, MTF = Max Time Frame

Tips:

- *When counting your school closure days, be sure to only count the days that coincide with the student's Days Scheduled. For example, if you have a school closure day that is on a Monday, but the student isn't scheduled for Mondays, then you wouldn't want to count that school closure day for this calculator.*
- *This calculator can also be used for Maximum Time Frame which is used when entering a student's schedule.*

SECTION 5: STUDENTS

1. Select Students from the main menu on the left side of the screen.
2. This will open 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.
3. Select Profiles to enter a student's profile.
4. 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.
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 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 is to keep track of all student information in an organized manner. In these pages 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, as well as the ability to view and compile a student's schedule. You can also view flags, and store 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. Each category is readily available from the main menu on the left hand side of the screen or from the header menu within a profile. It is imperative to enter student information accurately into OnlineSMART because the information you record will be used for a number of reports and other tasks.

Unenrolling a Student Profile Back to a Prospect Profile

If, for whatever reason, you need to convert a student profile back to a prospect profile, you can select the Unenroll button. For example, if you enrolled the wrong profile, or a student was not able to start, or you need to edit the Initial Contact, First Contact, or Enrollment dates, then you can unenroll the student profile. If any Grades, Lab Grades, or Attendance entries are added to the student's profile, then the Unenroll button will be grayed out and de-activated. Once all of those entries are deleted, the Unenroll button will be available again.

PERSONAL TAB (Video)

1. Select Students 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 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 into the Personal tab.

The Personal tab is used to keep track of all students' 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.

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. OnlineSMART has the capability of print students' addresses to 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 the 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.

FLAGS TAB (Video), NOTES TAB (Video), AND SATISFACTORY PROGRESS TAB (Video)

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 Satisfactory Progress sections, please select the corresponding tab to the right of the Flags information icon.

The purpose of the Flags, Notes, and Satisfactory Progress 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 appear on 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.

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.

STUDENT SCHEDULE (Video)

1. Select Students 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 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 Schedule from the top menu.

OR

1. Select Students from the main menu on the left side of the screen.
2. Select Student Schedule.
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 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 drop-down options in all of the schedules for your students. 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 odd schedules, 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.

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 Full Time.
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 drop-down list 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 drop-down list.
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 (Max Time Frame date), enter that date in the third default box.
6. In the Name field, enter the first few letters of the student's last name. A drop-down 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 drop-down box. This student's full name and permit number will now auto-populate.
8. Enter any additional students that you wish to assign a schedule.
9. If an individual student is going to be assigned to a different schedule, select the schedule you wish to assign that student from the Template drop-down.
10. If an individual student has a different start date than the default start date, then enter that student's start date.
11. If an individual student has a different end date than the default end date, then enter that student's end date.
12. Repeat these steps on the same screen for all students that you are assigning to a schedule.
13. Once you are finished, select Save from the top menu of the screen.

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.

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 and/or Night Hours. Please see the Administration: School Calendar section of this manual for more information. By doing this edit you will clear any day and/or night hours 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, or by using the Multiple Schedules page.

Scheduling Out to Maximum Time Frame Date

SMART recommends scheduling students out to their Maximum Time Frame Date. Maximum Time Frame is defined by your school. If your school receives Title IV aid, then it cannot be greater than the Maximum Time Frame as defined by the Department of Education, which is 150% of the published length (or normal time frame) of the course that the student is enrolled in. A student is no longer eligible for federal financial aid if they attend a course past this time frame. You can use SMART's Estimated Contract Calculator to verify or assist with calculating a student's Max Time Frame Date.

If you want to calculate a student's Max Time Frame Date manually, there are a number of ways you can do that. Please see our Maximum Time Frame Guide at the end of this manual for additional information on calculating this date.

Scheduling out to the Max Time Frame Date allows the system to continue to calculate a student's attendance percentage past their Contract Graduation Date. You can decide whether to schedule a student out to the Department of Education's Maximum Time Frame, or to your school's attendance percentage standard.

ACADEMICS TAB (Video)

1. Select Students 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 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 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; the assigned course is determined when you enroll a student. The Course drop-down 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 drop-down list 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 SMARTTime (the time clock software). 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. The Original Start and Start Date are automatically filled with the current date when you enroll a prospect into a student. The Original Start date is the date that the student began any type of study related to the course they are in. For example, if the student was a transfer student, then the Original Start would be the date they started at their previous school. The Start Date usually corresponds to the student's first day of attendance at your institution. Once you enroll a prospect into a student, Initial Contact, First Contact, and Enrollment dates cannot be edited.

Tips:

- *We advise not changing the Start Date and Original Start once these fields have been entered. For example, do not change the dates to correspond with a student's reenroll date.*

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.

Tips:

- *Initial Contact date is automatically set when a prospect is added to OnlineSMART.*

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.

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 are generally not more than a few days apart. 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.
3. Select the Drop button.
4. After dropping a student, remove the student's remaining scheduled hours past the student's last date of attendance.

Drop codes are hardcoded by SMART; more codes can be added under Administration: Codes: Drop Codes.

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.
4. The student is now reenrolled and will return to active status.
5. Starting with the reenrollment date, schedule the student back out to max time frame.

Do NOT change either the Original Start date or the Start Date in the Dates section of the Academics tab. The Reenroll button will not appear until a drop has been entered for the student. SMART gives schools the ability to track 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; by 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 drop-down list.
2. If you have no other information to enter, select Save from the top menu of the screen.

Entering a Transfer Code

1. From the Attendance and Enrollment Information section, choose the appropriate Transfer Code from the drop-down list.
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.

FINANCIAL TAB (Video)

1. Select Students from the main menu on the left side of the screen.
2. This will bring you to a search engine where you can search by last name, first name, social security number, course, and enrollment status.
3. Once you have selected the way you would like to search for your student or students, select the Search button.
4. This will generate a list of students meeting your search criteria.
5. Select the student's profile you wish to work in. You will be directed to that student's profile.
6. From here, select 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 is the total of any fee associated with the contract amount for that course, such as enrollment, registration, or application fees. 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 drop-down options are user defined. You can design these codes to meet your institution's needs. The options for the Contract Code drop-down list are setup in the Administration: Codes: Contract Codes tab. The Contract Type drop-down 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 and will appear 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 drop-down list. 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 drop-down list. The contract type options are hardcoded by SMART (Full Time, ¾ 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 on the Enrollment Period Table, 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.

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 (FISAP 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.

ISIR TAB (Video)

1. Select Students 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 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 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 which you will be able to use as part of your calculation for students' COA (Cost of Attendance). 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 drop-down list in the bottom right corner of the screen. Example: for 2018/2019, choose 2019.
2. If you have uploaded that processing year's ISIR, the information will display.

P-ISIR TAB (Dependent Student)

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. Select Students 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 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 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 drop-down list in the bottom right corner of the screen. Example: for 2018/2019, choose 2019.
2. If you have uploaded that processing year's ISIR, the information will display.

ADMISSION TESTS TAB (Video)

1. Select Students 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 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 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 drop-down list 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 drop-down list.
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.

CONTACTS TAB (Video)

1. Select Students 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 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 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.

ATTENDANCE (Video)

1. Select Students 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 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 Attendance from the top menu.

OR

1. Select Students from the main menu on the left side of the screen.
2. Select the Attendance option.
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 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: If 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.

Alternatively, if you need to edit multiple attendance entries for a student, you can select the Change View button at the top of the page. This allows you to edit each field on the Attendance page and then when you are finished editing you can save them all at once, rather than editing and saving each individual attendance entry.

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 drop-down 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 drop-down 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 which you can change 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.

Tips:

- *For Multiple Attendance, Multiple Grades and Multiple Lab Grades, SMART advises that you select save, from the top menu, after entering 5 - 20 grades.*

Attendance Records in the Attendance Section that are Highlighted in Red

If a student has an attendance entry when they are dropped, or they 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. 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.

LEAVE OF ABSENCE (LOA) (Video)

1. Select Students 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 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 LOA from the top menu.

OR

1. Select Students from the main menu on the left side of the screen.
2. Select Leave of Absence.
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 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.

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.
4. Select Save from the top menu of the screen.
5. 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.
4. After scheduling an LOA, the student's schedule must also be adjusted to accurately reflect the change to max time frame.

SMART calculates the new contract graduation date based on the number of calendar days for the LOA. 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.

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.

Tips:

- *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.
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. Select Save from the top menu of the screen.

Tips:

- *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.*

LAB GRADES (Video)

1. Select Students 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 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 Lab Grades from the top menu.

OR

1. Select Students from the main menu on the left side of the screen.
2. Select Lab Grades.
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 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 drop-down. The Lab drop-down 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.

    Tips:

    ➢ *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.*

Once the grades are entered, if you need to edit multiple Lab Grade entries for a student, you can select the Change View button at the top of the page. This allows you to edit each field on the Lab Grades page and then when you are finished editing you can save them all at once, rather than editing and saving each individual lab grade entry.

Entering Multiple Lab Grades

The 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 drop-down list 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 drop-down list. 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 which you can change if necessary.
7. Tab to the Lab drop-down. Select the lab description from the drop-down.
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.

GRADES (Video)

1. Select Students 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 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 Grades from the top menu.

OR

1. Select Students from the main menu on the left side of the screen.
2. Select Grades.
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 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.
2. Select the test description from the Test drop-down. The Test drop-down 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 drop-down.
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.

Once the grades are entered, if you need to edit multiple Grade entries for a student, you can select the Change View button at the top of the page. This allows you to edit each field on the Grades page and then when you are finished editing you can save them all at once, rather than editing and saving each individual grade entry.

Entering Multiple Test Grades

The 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 drop-down 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 drop-down 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 which can be changed if necessary.
7. Tab to the Test drop-down. Select the test description from the drop-down.
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.

DOCUMENTS (Video)

1. Select Students 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 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 Documents from the top menu.

OR

1. Select the Student option in the main menu to the left of the screen.
2. Select Documents.
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 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. 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 drop-down in Recommended Type. This drop-down 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.

FINANCIAL AID WORKSHEET (Fin Aid) (Video)

1. Select Students 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 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 Fin Aid from the top menu.

OR

1. Select Students from the main menu on the left side of the screen.
2. Select Financial Aid Worksheet.
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 Financial Aid Worksheet (Fin Aid).

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 drop-down. Use the award year that you will be paying the aid from.
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 drop-down list in the blank row. Choose the name of the award you are entering i.e. Pell, FSEOG, FDLPS, FDLPU, PLUSD (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 drop-down list 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. Check the box under Need Based if appropriate.
11. Once you are finished recording your information, select the Save button to the right of the row you are entering.

Tips:

- *Choose the later year in the current award year. For example: for 2018/2019, you would use 2019 for the year.*
- *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.*
- *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. Whether or not this box is checked is indicated in the Flags section, which is located on the right side of most areas of a student's profile. This allows the person who will be posting Title IV disbursements to know if this student is eligible for Title IV. To remove the flag, 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 drop-down list. 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 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 select 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 U.S. Department of Education. 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. 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 to any 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: 18/19 would be 2019.
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 drop-down list next to Verification. The options are: Not Required, Accurate, Reprocessed, Tolerance, W/O Documentation, and Selected, Not Verif. This information is obtained from the U. S. Department of Education, or your third party servicer.

SINGLE STUDENT LEDGER (Video)

1. Select Students 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 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 Ledger from the top menu.

OR

1. Select Ledgers from the main menu on the left side of the screen.
2. Select Single Student Ledger.
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 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.

Tips:

- *Ledger Types and Allocations are crucial to how information is directed throughout SMART. Ledger Types 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 Ledger Type.
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).
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 refer to 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 to review. An example of items to present would be a completed ledger, printed program summary reports, and other various ledger reports (such as the Earnings & Receivables Details report). If you do not follow SMART's recommendations on ledger posting procedures, it could adversely affect financial aid reports and other compliance reports.

Periods

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.

Ledger Types

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, Equip-Tools-Kit, Books, or Fees; if posted to something aside from Other; it will adversely affect your earnings reports. For example, using CNCL for Inst Scholarships will adversely affect the value per hour.

DISB (+ only) – This is used as a positive entry for Title IV funds only. This would include Pell, FDLPS, FDLPU, FSEOG, PLUSD, 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 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 the U.S. Department of Education 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.

Tips:

- *SMART recommends posting FSEOG funds with a Ledger Type 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 Ledger Type 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 – Post to the current calendar year.

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

CNCL – Post to the calendar year that the student's start date falls in.

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

MISC – Post to the current calendar year.

REFD – Post to the year and program that the original FA award was posted to.

WOFF – Post 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.

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 when posting non-contractual items that do not 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.

OvrContrct 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.

RECOMMENDED LEDGER POSTING PROCEDURES

Posting a Charge for Miscellaneous Items/Charges and Paying Them (Video)

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

1. Select ADJB as the Ledger Type.
2. Enter the amount of the charge as a negative number (Example: -25.00).
3. Choose the program that defines the miscellaneous charge.
4. In the bottom section of the ledger screen, allocate the charge to Misc and enter the same negative number (Example: -25.00).
5. Once you save, the ledger will reflect, in this example, a -25.00 miscellaneous charge in the upper portion of the screen.
6. 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

1. Select the appropriate Ledger Type (CASH or CARD).
2. Enter the amount as a positive number (Example: 25.00).
3. Choose the same program code you used to post the charge.
4. Allocate the payment to miscellaneous and enter the same positive number (Example: 25.00).
5. 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 (Video)
The same procedure listed above is used in this case.

When posting the over contract charges

1. Select ADJB as the Ledger Type.
2. Enter the amount as a negative number.
3. Choose Over Contract as the program (create this program).
4. Allocate the charge to OvrContrct Fee and enter the same negative number.
5. The ledger will now reflect an over contract balance in the upper portion of the screen.

When the student pays the over contract charge

1. Select the appropriate Ledger Type (such as CASH or CARD).
2. Enter the amount as a positive number.
3. Choose the same program code that you used to post the charge (Over Contract).
4. In the bottom section of the ledger screen, allocate the charge to Over Contract.
5. 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) (Video)

1. When posting payments to the ledger, as a general rule:
    a. Pay any fees charged in the contract first,
    b. Pay charges for kits and books second,
    c. Finally, pay tuition charges.
    d. Additional funds (overages) should be allocated to Other in the bottom section of the ledger.
2. Then you will adjust the overage amounts off of the ledger:
    b. Select ADJB as the Ledger Type,
    c. Enter the amount of the overage as a negative number (Example: -1000.00),
    d. Select Student Overage as the program (create this program),
    e. Allocate the amount to Other, entering the same negative number (Example: -1000.00).
3. Then you will pay the overage amount to the student.
    a. Select the appropriate Ledger Type (such as CASH or CARD),
    b. Enter the amount of the payment as a positive charge (Example: 1000.00),
    c. Choose Credit Balance To Student as the program (create this program),
    d. Allocate the payment to Student in the bottom row of the ledger.

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

1. Choose CNCL as the Ledger Type.
2. Enter the amount of contract charges associated cumulatively with payment periods 2, 3, and 4.
3. Enter this as a positive amount.
4. Choose the program Cancel PP 2, 3, 4 (create this program).
5. Allocate the same positive amount to Other.
6. 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.

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

1. Select CNCL as the Ledger Type.
2. Enter the amount of contract charges associated with PP 2.
3. Enter this number as a negative number this time.
4. Choose the program Post PP 2 (create this program).
5. Allocate the same negative number to Other.
6. Once saved, the ledger will reflect that the current balance is equal to the contract charges associated with payment period.

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

Posting Scholarships to the Ledger (Video)

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

1. As a general rule select the Ledger Type CASH or MISC.
2. Choose the program Scholarships.
3. Allocate to Tuition in the bottom section of the ledger screen.

For non-cash scholarship (a reduction in tuition)

1. Use the same procedure above.
2. Add “Institution Non-Cash” (or similar note) to the Check Number field.

Ledger Posting for a Dropped Student (Title IV Student) (Video)

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 Ledger Type, 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 Ledger Type, 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.

Tips:

- *A sample ledger has been provided at the end of this manual, for your review.*

Ledger Posting for a Reenrolled Student with a New Contract

If a student reenrolls in a course they had previously dropped and there is a new contract for this reenrollment, then there are a number steps to make sure that this is represented correctly in that student’s profile.

Editing an Existing Ledger Entry

1. From the main ledger screen, select the Edit option to the right of the entry you wish to edit.
2. This will direct you to the ledger posting and you will be able to edit all information except for Disbursement Date and Post Date.

Tips:

- *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.*
- *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, or you do not anticipate any more monies coming in on this student, and/or you do not want any other items to be posted to the ledger. 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.

R2T4 CALCULATION

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.

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.

   Tips:
   - *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 prepopulate 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 if needed.
8. Select Run Calculation and export the report into PDF.

GRADUATING STUDENTS TO AN ALUMNI

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.

SECTION 6: ALUMNI (Video)

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. If you need to run reports for alumni, you can do this from the Reports section.

ALUMNI PROFILES

1. Select the Alumni option in the main menu to the left of the screen.
2. Select Alumni Profiles.
3. 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.
4. Once you have selected the way you would like to search for your alumnus or alumni, select the Search button.
5. This will generate a list of alumni meeting your search criteria.
6. Select the alumnus' profile you wish to work in. You will be directed to that alumnus' profile.

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 drop-down list and their definitions.

Employed In Field – Student has graduated and found work in the same field they trained in.

Empld In Unrel Field – Student has graduated and is employed in a field unrelated to what they trained in.

Further Education – Student has enrolled in a different program/school to further their education.

Unemployed – Student has graduated, but has not found work in either a related or unrelated field.

Unknown – Student has graduated but their employment status is not known.

Other Unavailable – Student has graduated and their employment status is not an available option in the drop-down selections.

Incarcerated – Student has graduated, but is now incarcerated.

Active Mltary Serv – Student has graduated and is now actively serving in the military.

Death – Student has graduated, but has passed away.

Medical – Student has graduated, but is not employed due to medical issues.

International Stud – Student has graduated, but is an international student.

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 are not 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.

EMPLOYERS TABS

1. Select the Alumni option in the main menu to the left of the screen.
2. Select Alumni Profiles.
3. 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.
4. Once you have selected the way you would like to search for your alumnus or alumni, select the Search button.
5. This will generate a list of alumni meeting your search criteria.
6. Select the alumnus' profile you wish to work in. You will be directed to that alumnus' profile.
7. Select one of the three Employer tabs depending on the information you would like to see or enter.

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.
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.

SECTION 7: REPORTS (Video)

1. Select the Reports option in the main menu to the left of the screen.
2. This reveals two subsections: Report Type and Available Reports.

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.

REPORT CATEGORIES (Video)

There are a large number of reports in OnlineSMART and they are organized into seven folders under Available Reports.

The Alumni folder contains reports related to your graduated students. For example, the Alumni Demographics report contains basic personal and academic information for all of your graduated students.

The Annual folder contains reports related to information that your school may be required to submit to a governing agency. 1098T is a report that the IRS requires schools to provide to their students every year. ACCSC, COE, and NACCAS are the main accrediting bodies most schools are associated with. These reports provide the information that is available in OnlineSMART that schools are required to provide to these accrediting bodies every year. FISAP, Gainful Employment/Program Disclosure, and IPEDS reports provide information required to be reported to the Department of Education.

The Ledger folder contains reports regarding students' ledger and financial aid information and your school's income information. There are also reports that cover more specific information such as the 90-10 calculation and SFA Compliance Audit reports. Some of the more common reports to run are: Program Summary reports, Earnings and Receivables – Details, Financial Aid Awards, Financial Aid Disbursements Pending, Ledger Statement reports, and the Student Ledger Detail Report.

The Prospect folder contains reports related to your prospective students. Prospect reports help you track demographics and recruiting information which also helps evaluate the performance of your admissions representatives.

The Security folder has the Detailed Security Report within it that shows all of your current users in OnlineSMART and the access that has been granted to them.

The Student folder contains reports regarding students' demographic information, academic performance, and enrollment information. Some of the more common reports to run are: the Academic Transcript reports, Attendance reports such the Schedule and Attendance Date Range report and the Scheduled vs Actual Hours reports, the Progress Reports, the General Report, the SAP reports, and the Student Demographics report.

The System Setup folder contains reports that detail your OnlineSMART system settings. The most common report used in this category is the School Calendar Date Range report.

If you have the Report Type set to Query, the main report folders you will be able to access are Alumni, Ledger, Prospect, and Student.

REPORT TYPE: STANDARD VS. QUERY (Video)

There are two different options (Standard and Query) in the Report Type section, in the Reports sub-menu. 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 query that report for only the students that are marked as active in the system.

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 is either turned off or set to allow pop-ups from portal.OnlineSMART.net. This is found within your internet browser's options or settings.) 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 drop-down.
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 drop-down.
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.

Tips:

- *If, after you select Print, your browser flashes and nothing seems to happen, then the pop-blocker for your internet browser may be preventing the queried report from generating. In your internet browser, select Settings or Options, find the Pop-Up Blocker setting and either turn off that setting, or add "portal.onlinesmart.net" as an exception.*

Query Filter Options

Listed below is a breakdown by tab of the different filters available for querying. These options will vary depending on the type of report you are running.

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.

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

DOB – This field allows you to enter a date of birth 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 drop-down of race types to select from.

Marital Status – This gives you a drop-down of marital statuses to select from.

Scholastic Level – This gives you a drop-down of scholastic levels to select from.

Referral Code – This gives you a drop-down of referral codes to select from.

Tracking Code – This gives you a drop-down of tracking codes to select from.

Financial Aid – This gives you a drop-down of financial aid types to select from.

Education Level – This gives you a drop-down of education levels to select from.

Housing Plan – This gives you a drop-down of housing plans to select from.

Grade Level – This gives you a drop-down of grade levels to select from.

Employment Code – This gives you a drop-down of employment codes to select from.

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

Graduation Status – This gives you a drop-down 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 are 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 reenrolled more than once, this would be the date they dropped the first time.

Reenroll 1 – This is for students that have dropped and reenrolled. This is the reenrollment date; if they have dropped and reenrolled more than once, this would be the date that they first reenrolled.

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

Reenroll 2 – This is for students who have reenrolled 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.

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 within a date range.

HS Grad – This allows you to query by high school graduation within a date range.

Query – Courses Tab
Course Hrs – This allows you to query by using a range of course hours. Course hours are contract hours, not attended hours.

Attendance Hours – This allows you to query by using a range of attendance hours. This is how many hours are attended.

Course – This gives you a drop-down 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 the total amount of contract.

Amount – This allows you to query by the 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 drop-down 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 drop-down of available ledger entry types to select from.

Program – This gives you a drop-down 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 drop-down of available ledger codes to select from.

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 the Maintenance amount.

Total Family Income – This allows you to query by the 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.

Query – Grades tab
GPA – This allows you to enter a GPA range to query by.

DAILY REPORTS

Satisfactory Academic Progress Report
1. Query
2. Student
3. SAP / Scheduled vs Actual
4. Flags
5. Active

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. It is important to keep copies of this report in a binder or on 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 their next payment period.

Leave of Absence Status Active Student Report

1. Query
2. Student
3. Leave
4. Leave of Absence Status Active Student

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.

WEEKLY REPORTS

Last Payment Summary Report

1. Query
2. Ledger
3. Last Payment Summary
4. Flags tab
5. Active

This report shows all students that have a cash amount that they are scheduled to pay monthly and the last payment that was posted to the ledger for their record. This will help determine whether or not a student is late with their monthly payment.

Last Payment Aging Summary Report

1. Query
2. Ledger
3. Last Payment Aging Summary
4. Flags tab
5. Active

This report is the same as the Last Payment Summary except it will show how late students are on their scheduled payment (in relation to 30/60/90/120 days late).

Contract Graduation Approaching Report

1. Query
2. Student
3. Contract Graduation Approaching

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. Standard
2. Student
3. Attendance
4. Days Absent Exceptions Date Range

When this report is queried for a date range it will give you the ability to determine who has missed time within the date range you specified. 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. Query
2. Ledger
3. Financial Aid Disbursement Pending Date Range

This report shows any financial aid awards that have an Anticipated Disbursement Date, within the date range, and also still have a Remaining Amount, which indicates that the award has not been disbursed. You can use this report to predict how much federal aid (and/or scholarships and grants) will be expected to be received in a future date range. It can also be used to determine if any financial aid was not disbursed in the past.

Disbursement Forecasting Report

1. Query
2. Ledger
3. Disbursement Forecasting Range
4. Select a Course from the drop down menu
5. Select View Report

The Disbursement Forecasting report calculates a rough estimate of when your students will reach their next payment periods. This is based off of each student's attended hours compared with their start date and their schedule. This report is valuable and can be used to estimate when students will have attended any number of contract hours, and it can be divided into up to eight different periods. For example, if you wanted to calculate an estimated contract graduation date and maximum time frame date for a particular Start Date, you can create a mock student and schedule them out for a couple of years and then run this report for the mock student and change the Period 1 field to the contract hours and the Period 2 field to the maximum time frame hours (which can be calculated by following the Max Time Frame Guide or using the Estimated Contract Calculator).

Total Hours Summary Report

1. Query
2. Student
3. Attendance
4. Total Hours Summary

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. Query
2. Student
3. Attendance
4. Scheduled vs Actual Hours Start Date Range

This report pulls its information from the schedule page and also the attendance page. It is important that these two areas are correct in order to allow the report to calculate the attendance percentage for days and for hours, for the date range that you specify.

MONTHLY REPORTS

Earnings and Receivables - Details Report

1. Query
2. Ledger
3. Earnings and Receivables - Details

This report displays financial information and calculations for each student. It will show your value per hour, as well as the breakdown of what the students have paid in relation to fees, tuition, etc., within a date range. This is the most common report used by accounting. This report uses Posted Date data, not Disbursed Date.

Scheduled vs. Actual Hours Prior Month Report

1. Query
2. Student
3. Attendance
4. Scheduled vs Actual Hours Prior Month

This report will show you the prior month's 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. Query
2. Student
3. Academic Transcript
4. Academic Transcript Exam Date Order Prior Month

This report is used in most schools as a report card. Academic Transcripts Prior Month will show all completed tests and labs, as well as cumulative percentages for GPA, Scheduled vs. Actual, and projected dates. Please see the Basic Setup section to record the name and title of the school representative for the signature line. 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.

Ledger Statement Report

1. Query
2. Ledger
3. Ledger Statement

This report is a record of all payments received on the student account.

Monthly Attendance Hours Report

1. Query
2. Student
3. Attendance
4. Monthly Attendance Hours

This report will show the student hours for each day of the selected month and give cumulative percentages on attendance.

Progress Report

1. Query
2. Student
3. Progress Report
4. Progress Report

The progress report can be utilized as a report card when meeting with the student. It provides profile and cumulative date such as the Start Date, Contract Grad Date, Last Date of Attendance, GPA, Total Hours Scheduled, Total Hours Attended, and other data. 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.

Evaluation Report

1. Query
2. Student
3. Academic Transcript
4. Evaluation Report

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. A great way to use this report is to write your evaluation notes and plans for the upcoming month on the form, and have the student sign the evaluation. Having documentation in your students' file regarding their performance is a good idea; it helps the students, and assists the staff in effectively initiating change and offering direction.

ADDITIONAL REPORTS RECOMMENDED BY DEPARTMENT

	Type	Folder Path	Report Name
Accountant/CPA			
Earned Unearned Using Attended Hours	Query	Ledger	Earned Unearned Using Attended Hours
Refund Summary	Either	Ledger	Refund Summary
Program Summary	Either	Ledger	Program Summary
Income Statement	Either	Ledger	Income Statement
Admissions Representative			
Category Breakdown	Query	Prospect	Category Breakdown
Mail Labels	Query	Prospect	Prospect Mailing Labels by Name or Zip Code
Messaging List	Standard	(Prospect or Student or Alumni)	Messaging (Prospect or Student or Alumni) List
Monthly Prospect Tally	Query	Prospect	Monthly Prospect Tally
Prospect Conversion Statistics	Standard	Prospect	Prospect Conversion Statistics
Prospect General Report with Comments	Either	Prospect	Prospect General Report With Comments
Financial Aid Representative			
Earned Unearned Using Scheduled Hours	Query	Ledger	Earned Unearned Using Scheduled Hours
Transactions	Standard	Ledger	Transactions
Program Summary	Either	Ledger	Program Summary
SFA Compliance Audit	Standard	Ledger	SFA Compliance Audit
Student Demographics	Standard	Student	Student Demographics
Student Attendance History	Either	Student – Attendance	Student Attendance History
Instructors			
Emergency Contacts	Standard	Student	Emergency Contact
Student Attendance History	Either	Student – Attendance	Student Attendance History
Management / Directors / Owners			
Student Demographics	Standard	Student	Student Demographics
Enrollment Status	Either	Student	Enrollment Status
Program Summary	Either	Ledger	Program Summary
Refund Summary	Either	Ledger	Refund Summary

SECTION 8: GLOSSARY

1098-T – This is an IRS tax form that schools must provide to their students that outlines each student's payments, in order for a student to report this information on their own tax forms. In addition, schools must also report this information directly to the IRS.

90/10 Rule – "The requirement that a proprietary school must derive at least 10% of its revenues for each fiscal year from sources other than the FSA programs or be subject to sanctions." (https://ifap.ed.gov/ifap/helpGlossary.jsp?value=N)

AACS – American Association of Cosmetology School. AACS is "a national, non-profit association open to all privately owned schools of cosmetology arts & sciences. Our membership [is] comprised of cosmetology, skin, nail, barbering and massage schools." (http://beautyschools.org/aacs/about-aacs/)

ABHES – Accrediting Bureau of Health Education Schools. Independent non-profit agency unrelated to any trade or membership organization. A nationally-recognized accrediting agency of institutions and programs predominantly in allied health education.

Accreditation – "Accreditation is the recognition that an institution maintains standards requisite for its graduates to gain admission to other reputable institutions of higher learning or to achieve credentials for professional practice. The goal of accreditation is to ensure that education provided by institutions of higher education meets acceptable levels of quality." (https://ope.ed.gov/accreditation/FAQAccr.aspx)

ACCET - Accrediting Council for Continuing Education & Training. ACCET is a private, non-profit organization that has been monitoring and ensuring the quality of higher education since 1974. It has been recognized by the U.S. Department of Education as a National accrediting agency since 1978.

ACCSC – Accrediting Commission of Career Schools and Colleges. This is an organization whose scope includes "the accreditation of postsecondary, non-degree-granting institutions and degree-granting institutions … that are predominantly organized to educate students for occupational, trade and technical careers …" (http://www.accsc.org/About-Us/Overview.aspx).

Agencies – In OnlineSMART, Agencies refers to a Program Code that is applied to a ledger entry. It represents a transaction with a private institution that does not fit under the category of loan, scholarship, or grant.

AGI – Adjusted Gross Income. This number is calculated by subtracting certain deductions from an individual's total gross income. In OnlineSMART, this number is entered on (or imported to) the ISIR or PISIR tab.

Antic. Grad Dt – Anticipated Grad Date, Anticipated Graduation Date. This is a calculation in OnlineSMART that estimates the graduation date of a student based on a student's Start Date, Attendance, and Average Scheduled Hours.

ATB – Ability To Benefit test. The Ability-to-Benefit (ATB) testing requirement is for students who are seeking financial aid awards under the state's Tuition Assistance Program (TAP) for the first time in the 2006-2007 academic year, or thereafter, and do not have a high school diploma, or its equivalent (GED), from a United States high school.

Award Year – The period of time when a student is allowed to receive awarded funds for a year. The U.S. Department of Education considers the Award Year to be from July 1 to June 30 of the following year.

Cell Phone Carrier – This is the company that provides cellular telephone service for the student. This information is critical for being able to utilize the Messaging system in OnlineSMART.

Clock Hour – This mainly refers to the type of school which evaluates students based on the number of hours they have attended towards a certain course or program.

COE – Council on Occupational Education. This is "a national institutional accrediting agency for the accreditation of non-degree-granting and applied associate degree-granting postsecondary occupational education institutions." (http://council.org/history-mission-core-values/)

Contract Grad Date – Contract Graduation Date or CGD. This is the date that a student is estimated to finish their course if they attend at 100% of their schedule.

Credit Balance – Any amount on a student's ledger that is owed back to the student. In terms of federal aid "[a] credit balance that occurs whenever the amount of Title IV, HEA program funds credited to a student's ledger account for a payment period exceeds the amount assessed the student for allowable charges associated with that payment period." (https://ifap.ed.gov/ifap/helpGlossary.jsp?value=T)

Credit Hour – This mainly refers to the type of school which evaluates students based on the number of credits they have accumulated for their course or program.

Direct Loan G-Code – Your Direct Loan school code that is a six digit code beginning with G.

Disbursement – This mainly refers to Federal Aid that has been credited to a student's account.

DUNS Number – Data Universal Numbering System. "The D&B D-U-N-S® Number is a unique nine-digit identifier for businesses. It is used to establish a business credit file, which is often referenced by lenders and potential business partners to help predict the reliability and/or financial stability of the company in question." (http://www.dnb.com/duns-number.html)

EDconnect – This is a Windows program that assists users with sending, receiving, and managing their Federal student aid information electronically. Users collect data on their personal computer (PC) or computer system and transmit the collected data in batches over the Student Aid Internet Gateway (SAIG). The appropriate Title IV Application System receives the data, processes the data, performs any required database cross-referencing, and returns the processed data to the user's SAIG mailbox. The entire processing cycle for routine application data within the SAIG system is typically 72 hours (three working days).

EDExpress – This is the software that a school can use to access/retrieve the ISIR file, similar to TDClient. The EDExpress software is a PC application that processes, packages and manages Title IV student financial aid records. The U.S. Department of Education (ED) provides EDExpress to post-secondary educational institutions that participate in its Electronic Data Exchange (EDE) process.

EFC – Expected Family Contribution. "The Expected Family Contribution (EFC) is a measure of your family's financial strength and is calculated according to a formula established by law." (https://fafsa.ed.gov/help/fftoc01g.htm)

Enrollment – In OnlineSMART, this refers to a date field on the Academics tab of a prospect or student profile labeled Enrollment. While the profile is still a prospect, this field can be edited to any date the user requires. Once the profile is enrolled to a student, the field is grayed out and can no longer be edited. SMART recommends entering the date that a prospect signs your agreement or contract to attend your school.

FA – Financial Aid. Financial Aid is any grant, scholarship, loan, or paid employment offered to help a student meet his/her educational expenses. Such aid is usually provided by various sources, such as federal and state agencies, colleges, high schools, foundations, and corporations.

FAFSA – Free Application for Federal Student Aid. "The student aid application provided for under section 483 of the HEA, which is used to determine an applicant's eligibility for the federal student aid programs." (https://ifap.ed.gov/ifap/helpGlossary.jsp?value=F)

FCWSP – Federal College Work Study Program, Federal Work-Study (FWS) Program. This is a Title IV program for providing part-time employment to assist with educational expenses.

FDLPS – Federal Direct Loan Program Subsidized, Federal Direct Stafford/Ford Loan Program. "One of the components of the Direct Loan Program. It provides loans to undergraduate, graduate, and professional students attending schools that participate in the Direct Loan Program. The Department subsidizes the interest while the borrower is in an in-school, grace, or deferment period. Loans made under this program are referred to as Direct Subsidized Loans." (https://ifap.ed.gov/ifap/helpGlossary.jsp?value=F)

FDLPU – Federal Direct Loan Program Unsubsidized, Federal Direct Unsubsidized Stafford/Ford Loan Program. "One of the components of the Direct Loan Program. It provides loans to undergraduate, graduate, and professional students attending schools that participate in the Direct Loan Program. The borrower is responsible for the interest that accrues during any period. Loans made under this program are referred to as Direct Unsubsidized Loans." (https://ifap.ed.gov/ifap/helpGlossary.jsp?value=F)

FFELS – Federal Family Education Loan Subsidized Programs. This is a former Title IV loan program.

FFELU – Federal Family Education Loan Unsubsidized Programs. This is a former Title IV loan program.

First Contact – This field in OnlineSMART is located on a profile's Academic tab. While the profile is still a prospect, this field can be edited to any date the user requires. Once the profile is enrolled to a student, the field is grayed out and can no longer be edited. SMART recommends using the date that the school first communicates with, or responds to, the prospective student.

FISAP – Fiscal Operation Report and Application to Participate. This refers to the form and process for applying for funding for an upcoming award year and to report expenditures for the previous award year.

Fiscal Year – "An accounting year that ends on a date other than December 31. For example, a school district might have a fiscal year of July 1, 2011 through June 30, 2012." (https://ifap.ed.gov/ifap/helpGlossary.jsp?value=F)

FSEOG – Federal Supplemental Educational Opportunity Grant. FSEOG "is a grant for undergraduate students with exceptional financial need." (https://studentaid.ed.gov/sa/types/grants-scholarships/fseog)

FTI – FISAP Total Income. This "represents the family's total income for the independent student and spouse, or for the dependent student and parents. For a dependent student, the FTI amount is the sum of the STI (student's total income) plus the TI (parents' total income). For an independent student, the TI (total income) and the FTI amounts will be the same. The FTI value will also appear on SARs and ISIRs for students who qualify for the automatic zero EFC." (https://ifap.ed.gov/sarmaterials/doc0027_bodyoftext.htm).

GE – Gainful Employment. This refers to requirements and regulations from the U.S. Department of Education regarding data on the employment placement of a school's alumni.

GPA – Grade Percent Average. In OnlineSMART, this refers to a student's average percent performance based on the grade weighting of Tests grades (Theory, quizzes, homework, etc.), Major grades (Mid-terms, Final, etc.), and Lab grades (practicals, services, etc.)

Grants – This is an amount of money given to a student for educational expenses, usually based on a student's need.

Guarantors – Guarantee agencies. These are third-party institutions or organizations that insure a loan against default.

IFP – Institutional Finance Plan. In OnlineSMART, this is a ledger program code that refers to a payment made directly by a student towards their contracted amount with the school.

In Default – In OnlineSMART, this refers to when a student has a contract balance on their ledger and has failed to make payments.

Initial Contact – This field in OnlineSMART is located on a profile's Academic tab. It is automatically populated with the date that the profile was created. While the profile is still a prospect, this field can be edited to any date the user requires. Once the profile is enrolled to a student, the field is grayed out and can no longer be edited. If you wish to change this field, SMART recommends using the date that the prospect first communicates with your school.

Inst Scholarship – Institutional Scholarship. This is a ledger program code in OnlineSMART that indicates a scholarship that has been given to a student by the school.

IoIFP – Interest on Institutional Finance Plan. IoIFP is a program code for a ledger entry in OnlineSMART. If your school charges a student's interest amount up front, then you can use this program code when entering that amount onto a student's ledger.

IPEDS – Integrated Postsecondary Education Data System. The system that schools (that accept Title IV funds) are required to use to report their data to the U.S. Department of Education.

IRA – Individual Retirement Account, Individual Retirement Arrangement. In OnlineSMART, IRA Payments and IRA Distributions can be entered on a profile's ISIR and/or PISIR tab. If ISIRs are imported, then this will be filled automatically.

ISIR – Institutional Student Information Record. "ISIRs contain processed student information reported on the Free Application for Federal Student Aid (FAFSA), as well as key processing results and National Student Loan Data System (NSLDS) financial aid history information. ISIRs are sent electronically to schools by the Central Processing System (CPS)." (https://ifap.ed.gov/ifap/byAwardYear.jsp?type=isirguide)

Lenders – These are third-party institutions or organizations that loan students money for educational expenses.

LG Grant – Local Government Grant. This is an amount of money given to a student by a local government, such as a county or city, for educational expenses, usually based on need.

LG Scholarship – Local Government Scholarship. This is an amount of money given to a student by a local government, such as a county or city, for educational expenses, usually based on merit.

Max Time Frame – Maximum Time Frame or MTF. This is the amount of time that a student is allowed to attend a course at your school, and still qualify for such things as federal financial aid. This also commonly refers to the actual date that the Max Time Frame would fall on. For example, if a course is 1000 hours, and a student is scheduled for 20 hours a week, then the student would finish the course in 50 weeks, if they had perfect attendance. However, if you apply the Department of Education's definition of Max Time Frame of 150%, then the student is allowed to be scheduled for 1500 hours, which would equal 75 weeks, in order for the student to reach 1000 attended hours. You can use our Estimated Contract Calculator to assist you with finding the Max Time Frame, or you can use the Max Time Frame Guide to assist you in calculating this date manually.

Median – The middle value in a range of values. The median is required to be found in certain circumstances, such as when reporting Program Disclosure information for Gainful Employment.

Minimum Attendance % – In OnlineSMART, this percentage is the minimum amount of time a student can attend and still be considered to be within the school's Satisfactory Academic Progress standards.

Minimum GPA Value – In OnlineSMART, this percentage is the minimum average grade percent that a student can achieve and still be considered to be within the school's Satisfactory Academic Progress standards.

NACCAS – National Accrediting Commission of Career Arts and Sciences. "NACCAS is recognized by the U.S. Department of Education as a national agency for the institutional accreditation of postsecondary schools and departments of cosmetology arts and sciences, including specialized schools." (http://naccas.org/naccas/what-is-naccas)

Need Based – This refers to any type of aid that is based on the financial need of the recipient.

Normal Time – This is used in the Gainful Employment Disclosure and is referred to as Normal Time to Completion. This is defined as the amount of time it would take a student to complete a course according to your school's catalog or publications.

NSLDS – National Student Loan Data System. "The National Student Loan Data System (NSLDS) is the U.S. Department of Education's central database for student aid." (https://fp.ed.gov/nslds.html)

OPE ID – Office of Postsecondary Education Identification number. "The Office of Postsecondary Education Identification (OPE ID) number is assigned by the U.S. Department of Education to identify schools that have Program Participation Agreements (PPA) so that its students are eligible to participate in Federal Student Financial Assistance programs under Title IV regulations. The first 6-digits of the OPE ID number relate to the education institution, and are followed by a 2-digit suffix used to identify branches, additional locations, and other entities that are part of the eligible educational institution." (https://www.dodmou.com/Home/EnterOpeidBeforeCreateUserAccount)

PELL – Federal Pell Grant. "The Federal Pell Grant Program provides need-based grants to low-income undergraduate and certain post baccalaureate students to promote access to postsecondary education. … Grant amounts are dependent on: the student's expected family contribution (EFC) (see below); the cost of attendance (as determined by the institution); the student's enrollment status (full-time or part-time); and whether the student attends for a full academic year or less." (https://www2.ed.gov/programs/fpg/index.html)

Pell ID – Federal Pell Grant Identification number. This is a school's identifying number for receiving Federal Pell Grants. This number is mainly used for importing ISIR files.

PERKINS – "The Federal Perkins Loan Program provides money for college or career school for students with financial need. … Loans made through the Federal Perkins Loan Program, often called Perkins Loans, are low-interest federal student loans for undergraduate and graduate students with exceptional financial need." (https://studentaid.ed.gov/sa/types/loans/perkins)

Permit # – Permit Number. The Permit # (Permit Number) is a unique identifier for each profile that is created in OnlineSMART.

PL – Private Loan. This is a ledger program code in OnlineSMART that refers to any type of loan given to a student by a private institution.

PLUS – PLUS Loans, (FKA Parent Loan for Undergraduate Students). "PLUS loans are federal loans that graduate or professional students and parents of dependent undergraduate students can use to help pay for college or career school. PLUS loans can help pay for education expenses not covered by other financial aid." (https://studentaid.ed.gov/sa/types/loans/plus)

PLUSD – Direct PLUS Loans.

Program Disclosure – This refers to requirements and regulations from the U.S. Department of Education regarding reporting and disclosure to potential students of a school's Gainful Employment data.

R2T4 – Return to Title IV. This refers to the calculation of the amount of a federal grant or loan that is required to be returned to the federal government, due to a student that has received federal aid, but then has withdrawn from the program they received the funds for.

S Grant – State Grant. This is an amount of money given to a student by a state government for educational expenses, usually based on need.

S Scholarship – State Scholarship. This is an amount of money given to a student by a state government for educational expenses, usually based on merit.

Scholarship – This is an amount of money given to a student for educational expenses, usually based on a student's merit.

SAIG – Student Aid Internet Gateway. "The Student Aid Internet Gateway (SAIG) is the tool that allows Federal Student Aid trading partners to securely exchange batch data with Federal Student Aid Application Systems." (https://fsawebenroll.ed.gov/PMEnroll/index.jsp)

SAP – Satisfactory Academic Progress. SAP is the indicator for whether your student is progressing according to your school's Minimum GPA Percent as well as your school's Minimum Attendance Percent. If a student is not achieving either of those minimums then they will not be achieving your school's SAP standard.

SEOG MATCH – Supplemental Educational Opportunity Grant Matching Grant. This ledger program code represents an amount of money awarded to a student in the form of a grant that is usually based on a percentage of aid that the student has already been awarded.

TIN Number – Tax Identification Number, Federal Taxpayer Identification Number. In OnlineSMART, this is your school's federal taxpayer identification number that must be obtained from the Internal Revenue Service (IRS).

Title IV – Title IV refers to a section in the Higher Education Act allowing for the federal government to provide financial aid for educational expenses. There are three types of aid: Loans, Grants, and Work-Study. In OnlineSMART, Title IV refers to the actual financial aid received by the student, as well as the program and system for providing this aid.

VEB – Veterans Educational Benefits. In OnlineSMART, VEB is a ledger program code that refers to any transaction dealing with the Veterans Administration (VA). It can be used for any of the benefits that are outlined in the Higher Education Act, and also for newer sources of veteran aid, such as Post 9/11 aid.

Verification – "The process under which an applicant's FAFSA information is selected by the Department or a school and determined to be accurate (true and complete within certain parameters) or inaccurate." (https://ifap.ed.gov/ifap/helpGlossary.jsp?value=V)

MAX TIME FRAME GUIDE

This guide includes some suggestions on how to determine a student's Maximum Time Frame Date, in order to schedule a student out to this date, in accordance with your school's determination of Max Time Frame.

Calculate Max Time Frame Hours

In order to find a Maximum Time Frame Date you must first calculate the number of hours that the Max Time Frame is equivalent to. The Maximum Time Frame Hours is calculated from a course's Contract Hours by using a percentage of a course's Published Course Length (or "Normal Time for Completion") or by using your institution's Minimum Attendance Percentage.

The Department of Education usually refers to a student's time frame in terms of a percentage of a course or program's Published Course Length. For example, if a student exceeds 150% of their Published Course Length, then they are no longer eligible for federal financial aid. To calculate the Max Time Frame Hours from this percent:

1. First convert the percentage to a number by dividing it by 100.
2. Then multiply the Contract Hours by this number.

For example, to find the Max Time Frame Hours for 150% of a Published Course Length:

1. First divide 150 by 100, which is 1.5.
2. Then, for a course with 1200 Contract Hours, multiply 1.5 by 1200, to get a Maximum Time Frame Hours of 1800.

The table below shows some Max Time Frame Hours examples for some common percentages of Published Course Lengths and Contract Hours.

	Maximum Time Frame Hours = Contract Hours x Percent of Published Course Length							
	Common Percentages of Published Course Length or Normal Time							
Contract Hours	**200%**	**150%**	**145%**	**135%**	**125%**	**115%**	**110%**	**105%**
600	1200	900	870	810	750	690	660	630
900	1800	1350	1305	1215	1125	1035	990	945
1200	2400	1800	1740	1620	1500	1380	1320	1260
1500	3000	2250	2175	2025	1875	1725	1650	1575

A school's Minimum Attendance Percentage is different from the Percent of a Published Course Length in that it is used to track a student's current performance. Calculating the Maximum Time Frame Hours using your school's Minimum Attendance Percentage is a similar calculation. Instead of multiplying the numbers, you divide the Contract Hours by the Minimum Attendance Percentage after converting the percentage to a number. For example, to find the Max Time Frame Hours for a 75% Minimum Attendance Percentage:

1. First divide 75 by 100, which is 0.75.
2. Then, for a course with 1200 Contract Hours, divide 1200 by 0.75, to get a Maximum Time Frame Hours of 1600.

The table below shows some Max Time Frame Hours examples for some common Minimum Attendance Percentages and Contract Hours.

	Maximum Time Frame Hours = Contract Hours ÷ Minimum Attendance Percentage							
	Common Minimum Attendance Percentages							
Contract Hours	**50%**	**66.66%**	**70%**	**75%**	**80%**	**85%**	**90%**	**95%**
600	1200	900.09	857.14	800	750	705.88	666.67	631.58
900	1800	1350.14	1285.71	1200	1125	1058.82	1000.00	947.37
1200	2400	1800.18	1714.29	1600	1500	1411.76	1333.33	1263.16
1500	3000	2250.23	2142.86	2000	1875	1764.71	1666.67	1578.95

Convert the Max Time Frame Hours into Weeks

Once the Maximum Time Frame Hours is calculated, you then convert this number into the number of weeks needed to accomplish this total, depending on the number of hours a student plans on attending per week.

1. First, calculate the number of hours a student will be attending on a weekly basis.
2. Then divide the Max Time Frame Hours by the number of hours attended each week.

For example, for a 1200 hour course, at a 75% minimum attendance:

1. If the student plans on attending 32 hours per week,
2. Divide the Max Time Frame Hours of 1600 by 32 hours per week, which equals 50 weeks.

The two tables below show examples of the Max Time Frame Hours converted to weeks for a weekly attendance of 32 hours per week and 20 hours per week.

	Number of Weeks for Max Time Frame = Max Time Frame Hours ÷ 32 Hours Per Week							
	Common Minimum Attendance Percentages							
Contract Hours	50%	66.66%	70%	75%	80%	85%	90%	95%
600	38	28.13	26.79	25	23.44	22.06	20.83	19.74
900	56	42.19	40.18	38	35.16	33.09	31.25	29.61
1200	75	56.26	53.57	50	46.88	44.12	41.67	39.47
1500	94	70.32	66.96	63	58.59	55.15	52.08	49.34

	Number of Weeks for Max Time Frame = Max Time Frame Hours ÷ 20 Hours Per Week							
	Common Minimum Attendance Percentages							
Contract Hours	50%	66.66%	70%	75%	80%	85%	90%	95%
600	60	45.00	42.86	40	37.50	35.29	33.33	31.58
900	90	67.51	64.29	60	56.25	52.94	50.00	47.37
1200	120	90.01	85.71	80	75.00	70.59	66.67	63.16
1500	150	112.51	107.14	100	93.75	88.24	83.33	78.95

Calculate and Schedule to the Max Time Frame Date

Once you have the number of weeks that corresponds to the student's Max Time Frame Hours you can then count those number of weeks from the student's Start Date to get an estimate of the student's Max Time Frame Date. Once you have the Max Time Frame Date, you can enter the student's schedule out until this date. After entering the schedule, generate the schedule report to find the total scheduled hours and compare that to the Max Time Frame Hours. Add or remove scheduled days to or from the end of the student's schedule to make the total scheduled hours equal to the Max Time Frame Hours. Discrepancies may be due to school closure days or rounding in calculations. To assist you in calculating the Max Time Frame Date you can use our Estimated Contract Calculator.

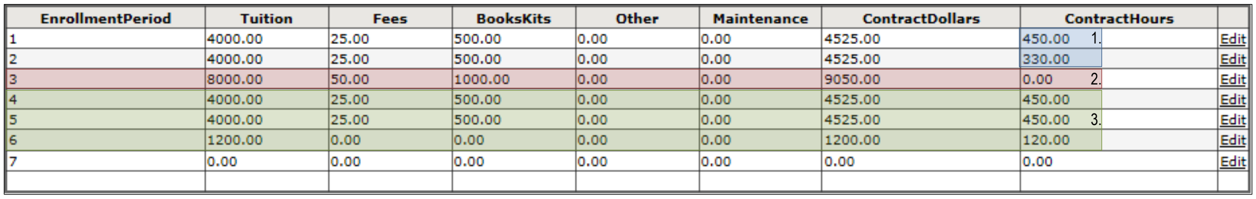
SAMPLE LEDGER GUIDE

This ledger guide is an example of a student who dropped a course in their second payment period and then reenrolled two years later with a new contract amount. Prior to adding any ledger entries for a student that has a new contract, you want to make sure to update the Financial tab with the new contract amount and then you want to adjust the ledger for the new contract amount and make sure that the previous contract balance is all accounted for.

Adjusting the Financial Tab

The Financial tab can be configured in a number of different ways to represent the new contract amount. For this example:

1. The Contract Hours for rows one and two were adjusted to reflect the number of hours the student attended in each period,
2. And then, what were originally rows three and four were consolidated into row three to represent the payment periods that the student did not attend, for the first contract. The Contract Hours for row three is zero to represent no attendance for that row.
3. Starting in row four, the new contract was broken into three new rows to represent the new payment periods and contract hours.



EnrollmentPeriod	Tuition	Fees	BooksKits	Other	Maintenance	ContractDollars	ContractHours	
1	4000.00	25.00	500.00	0.00	0.00	4525.00	450.00 1.	Edit
2	4000.00	25.00	500.00	0.00	0.00	4525.00	330.00	Edit
3	8000.00	50.00	1000.00	0.00	0.00	9050.00	0.00 2.	Edit
4	4000.00	25.00	500.00	0.00	0.00	4525.00	450.00	Edit
5	4000.00	25.00	500.00	0.00	0.00	4525.00	450.00 3.	Edit
6	1200.00	0.00	0.00	0.00	0.00	1200.00	120.00	Edit
7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Edit

Sample Ledger Entries

The Ledger Statement Report on the next page is highlighted and numbered according to recommended ledger posting procedures, as outlined in the table below.

1. Canceling unused payment periods at the start of a ledger and then adding them back on as they occur.	Video
2. Canceling a new contract amount at the start of a ledger and then adding it back on by payment periods as they occur.	Video
3. Prepaying a contract amount, such as an enrollment fee, all upfront, but disbursing it to payment periods as they occur.	Video
4. Posting Title IV disbursements and allocating any overpayment amounts for a payment period (Overages) to "Other".	Video
5. Adjusting the Overage amount to zero and paying that Credit Balance out to the student.	Video
6. Posting and paying a non-contract charge or fee. The same method is used for Over Contract Fees.	Video
7. Posting Unearned Tuition that is calculated once a student drops and the school has completed their Institutional Refund Calculation.	Video
8. Posting any Title IV aid that is required to be refunded after performing the R2T4 calculation for the student.	Video
9. Canceling all contract balances for the first contract, after the student has reenrolled and signed a new contract with a new amount.	Video

Contract: $28,350.00

	Date	Year	Type/Code	Transaction Amount	Voucher Number	Program	Pay Period	Tot Pd-Student	Tot Pd Contract	Contract Balance
1.	1/1/2013	2013	CNCL/Other	13575.00	Cancel PP 2, 3, 4	CNCL AY/PP	10		13575.00	14775.00
2.	1/1/2013	2015	CNCL/Other	10250.00	Cancel Reenroll Contract	CNCL AY/PP	10		23825.00	4525.00
3.	1/2/2013	2013	CARD/Fees	25.00	Amex #4545	IFP	11		23850.00	4500.00
	1/2/2013	2013	CARD/Misc	75.00	Amex #4545	IFP	11		23850.00	4500.00
4.	1/3/2013	2013	DISB/Books	500.00	5555555	PELL	11		24350.00	4000.00
	1/3/2013	2013	DISB/Tuition	2275.00	5555555	PELL	11		26625.00	1725.00
	2/1/2013	2013	DISB/Tuition	1725.00	555444	FDLPS	11		28350.00	0.00
	2/1/2013	2013	DISB/Other	8.00	555444	FDLPS	11		28358.00	-8.00
	2/1/2013	2013	DISB/Other	2970.00	555444	FDLPU	11		31328.00	-2978.00
5.	2/4/2013	2013	ADJB/Other	-2978.00	Adjusting Overages	Credit Balance	11		28350.00	0.00
	2/4/2013	2013	CASH/Student	2978.00	#2555 Overage to Student	Credit Balance to Student	11	2978.00	28350.00	0.00
6.	3/10/2013	2013	ADJB/Misc	-25.00	10 Consecutive tardy Fee	Late Fee	11		28350.00	0.00
	3/12/2013	2013	CASH/Misc	25.00	Payment of Fee Check #321	Late Fee	11		28350.00	0.00
1.	4/1/2013	2013	CNCL/Other	-4525.00	Start/Add Payment Period 2	Post AY/PP	12		23825.00	4525.00
3.	4/2/2013	2013	MISC/Fees	25.00	Pay Fee from Misc Balance	IFP	12		23850.00	4500.00
	4/2/2013	2013	MISC/Misc	-25.00	Pay Fee from Misc Balance	IFP	12		23850.00	4500.00
4.	4/16/2013	2013	DISB/Books	500.00	55555556	PELL	12		24350.00	4000.00
	4/16/2013	2013	DISB/Tuition	2275.00	55555556	PELL	12		26625.00	1725.00
	4/16/2013	2013	DISB/Tuition	1725.00	555777	FDLPS	12		28350.00	0.00
	4/16/2013	2013	DISB/Other	8.00	555777	FDLPS	12		28358.00	-8.00
	4/16/2013	2013	DISB/Other	2970.00	555777	FDLPU	12		31328.00	-2978.00
5.	4/20/2013	2013	ADJB/Other	-2978.00	Adjusting Overage	Credit Balance	12		28350.00	0.00
	4/20/2013	2013	CASH/Student	2978.00	Stu Chk #5874	Credit Balance to Student	12	5956.00	28350.00	0.00
6.	5/30/2013	2013	ADJB/Misc	-150.00	Assess Fee due to Drop	Termination Fee	10		28350.00	0.00
1.	5/30/2013	2013	CNCL/Other	-9025.00	Add remaining PP due to drop	Post AY/PP	10		19325.00	9025.00
6.	5/30/2013	2013	CARD/Misc	100.00	Amex #4545 $50 from unpaid Enroll Fee used for part of this fee	Termination Fee	10		19325.00	9025.00
7.	5/31/2013	2013	CNCL/Tuition	4800.00	School retains 70%, cancels 30% tuition	Unearned Tuition	10		24125.00	4225.00
8.	6/1/2013	2013	REFD/Tuition	-1000.00	R2T2 Calc of Refund to Sub Loan	FDLPS	12		23125.00	5225.00
9.	5/7/2015	2015	CNCL/Fees	50.00	Cancel Previous Contract Per New Contract	IFP	10		23175.00	5175.00
	5/7/2015	2015	CNCL/Books	1000.00	Cancel Previous Contract Per New Contract	IFP	10		24175.00	4175.00
	5/7/2015	2015	CNCL/Tuition	4175.00	Cancel Previous Contract Per New Contract	IFP	10		28350.00	0.00
2.	5/8/2015	2015	CNCL/Other	-4525.00	Add PP 1 of New Contract	Post AY/PP	11		23825.00	4525.00
3.	5/11/2015	2015	CARD/Fees	25.00	Amex #4545, Total New Contract Fees	IFP	10		23850.00	4500.00
	5/11/2015	2015	CARD/Misc	25.00	Amex #4545, Total New Contract Fees	IFP	10		23850.00	4500.00

Total Tuit: 7,000.00 Book: 1,000.00 Fee: 75.00 Kit: 0.00 Other: 0.00

Total Over Contract Penalties Bal.:	0.00
Total Miscellaneous Balance:	25.00