

## Appendix

Add a new line item to the Pell Improper Payment Report – specifically the 2012-2013 FAFSA line item 92 (a-i) .

**STEP 1:** Open the Pell Improper Payment Report and re name it as “[the Pell Improper Payment with Line 92 Report](#)”.

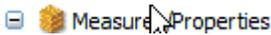
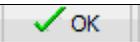
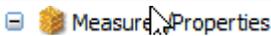
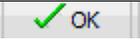
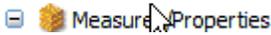
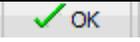
|   |   |   |
|---|---|---|
| 1 | Once your data is uploaded and validated in the tool, select <i>analysis of data</i> .  |   |
| 2 | From the domain tree select <i>IA Tool 12-13</i>  |   |
| 3 | Select <i>Reporting Objects Folder</i>  |   |
| 4 | Select <i>Custom Reports Folder</i>   |   |
| 5 | RIGHT click on the Pell Improper <i>Payment Reports</i>   |   |
| 6 | Select <i>YES</i> when the pop up box opens   |   |
| 7 | Select <i>Build a Report</i>  | Be patient – takes a few minute to display  |
| 8 | From the top ribbon bar select the <i>IA Icon</i> and select <i>Save AS icon</i> and re name the file: <i>Pell Improper Payments_with Line 92</i>           |  |
| 9 | Close out of this report by selecting the  in the upper right hand corner. |   |

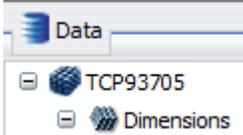
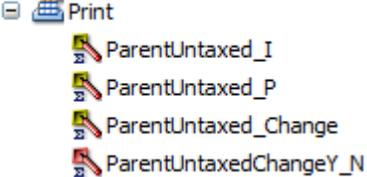
**Step 2:** Open the NEW Report just created “[the Pell Improper Payment with Line 92 Report](#)”.

We will now create 4 new categories.

|   | Category   | Description   |
|---|--|---|
| 1 |  ParentUntaxed_I        | Which will include all “initial” untaxed income line 92 (a-i) |
| 2 |  ParentUntaxed_P        | Which will include all “paid on” untaxed Income line 92 (a-i) |
| 3 |  ParentUntaxed_Change   | Difference between paid on and Initial                        |
| 4 |  ParentUntaxedChangeY_N | Y = if change, N= if no change to untaxed                     |

|   |  |  |
|---|--|--|
| 1 | To begin to modify your new report, select <i>My Report Folder</i> .   |  My Reports                         |
| 2 | Select <i>Custom Reports Folder</i> .  |  Custom Reports                     |
| 3 | Locate the <i>Pell Improper Payments with Line 92 Report</i> and right click and select <i>info assist</i> . |  Pell Improper Payment with Line 92 |
| 4 | Select <i>YES</i> when the pop up box opens  |  |
| 5 | Select <i>Build a Report</i>   |  |

|    |   |   |
|----|---|---|
| 6  | From the ribbon Select <b>Data</b> and then select the <b>Details icon</b>  |    |
| 7  | In Field box, name field: <i>parent Untaxed</i> ,   | Field Define_1  |
| 8  | Go to the right of the screen and select Dimensions.  |    |
| 9  | <i>Measures and Prosperities</i> will appear. <i>Scroll down</i> to locate the fields you are looking for. The fields you are looking for are identified in step number 9.  |    |
| 10 | Locate <i>all the fields identified to the right of this box</i> . You will select one at a time by double clicking on each field so that they appear in the box. Once it appears in the box, select the plus sign before double clicking on the next ISIR field. Once all the fields are selected, proceed to step 10. These fields represent ISIR Field 92 (a-i) on the 12-13 FAFSA. <i>You are looking for INITIAL Transactions.</i><br><br>* Note you will have to scroll down to find each of these fields located under Measure/Properties. | TCP93705.TCP03705.PAR_PENSION_I +<br>TCP93705.TCP03705.PAR_IRA_I +<br>TCP93705.TCP03705.PAR_CHILDSUP_RE_I +<br>TCP93705.TCP03705.PAR_INT_INC_I +<br>TCP93705.TCP03705.PAR_IRA_DISTRIB_I +<br>TCP93705.TCP03705.PAR_PENSION_I +<br>TCP93705.TCP03705.PAR_MIL_ALLOW_I +<br>TCP93705.TCP03705.PAR_VA_NONBENEF_I +<br>TCP93705.TCP03705.PAR_OTHER_INC_I |
| 11 | Once you have all the fields select  at the bottom of the box.   |   |
| 12 | From the ribbon Select <b>Data</b> and then select the <b>Details icon</b>  |   |
| 13 | In the Field box, name field: <i>Parent untaxed P</i> , go to the right and click on Dimensions.  |   |
| 14 | <i>Measures and Prosperities</i> will appear. <i>Scroll down</i> to locate the fields you are looking for.  |    |
| 15 | Locate <i>all the fields identified to the right of this box</i> . You will select one at a time by double clicking on each field so that they appear in the box. Once it appears in the box, select the plus sign before double clicking on the next ISIR field. Once all the fields are selected, proceed to step 10. These fields represent ISIR Field 92 (a-i) on the 12-13 FAFSA. <i>You are looking for PAID on Transactions.</i><br><br>* Note you will have to scroll down to find each of these fields located under Measure/Properties. | TCP93705.TCP03705.PAR_PENSION_P +<br>TCP93705.TCP03705.PAR_IRA_P +<br>TCP93705.TCP03705.PAR_CHILDSUP_RE_P +<br>TCP93705.TCP03705.PAR_INT_INC_P +<br>TCP93705.TCP03705.PAR_IRA_DISTRIB_P +<br>TCP93705.TCP03705.PAR_PENSION_P +<br>TCP93705.TCP03705.PAR_MIL_ALLOW_P +<br>TCP93705.TCP03705.PAR_VA_NONBENEF_P +<br>TCP93705.TCP03705.PAR_OTHER_INC_P |
| 16 | Once you have all the fields select  at the bottom of the box.   |   |
| 17 | From the ribbon Select <b>Data</b> and then select the <b>Details icon</b>  |   |
| 18 | In the Field Box, name field: <i>Parent Untaxed Change</i> , go to the right and click on Dimensions.   |    |
| 19 | <i>Measures and Prosperities</i> will appear. <i>Scroll down</i> to locate the fields you are looking for.  |    |
| 20 | We are locating the <i>fields identified to the right</i> . These are the fields we created in steps 10 and 15.   | ParentUntaxed_P - ParentUntaxed_I   |
| 21 | Once you have all the fields select  at the bottom of the box.   |   |

|    |  |  |
|----|--|--|
| 22 | From the ribbon Select <b>Data</b> and then select the <b>Details icon</b>   |  |
| 23 | In the Field Box, name field: <i>Parent Untaxed Change Y_N</i>   |  |
| 24 | Since this will be an alphanumeric field we will need to change the format. Go to <i>Change Format</i> and select <i>Alphanumeric</i> .  | Field type:<br>Alphanumeric  |
| 25 | Locate the <i>field identified to the right "ParentUntaxed_Change"</i> . Double click on the field so it will appear in the box. Once it appears in the box, select the <i>EQ sign</i> and select the <i>number 0</i> then select <i>'THEN'</i> and then select <i>'NO'</i> and then select <i>'YES'</i> .<br><br>* Be sure to use the single quote signs when typing the words <i>'NO'</i> and <i>'YES'</i> | IF ParentUntaxed_Change EQ 0 THEN ' NO'<br>ELSE 'YES'  |
| 26 | Once you have all the fields select  at the bottom of the box.  |  |
| 27 | Bring the 4 categories into the report <ul style="list-style-type: none"> <li>From the left hand side of the screen locate the Data icon and the Dimensions icon. Scroll down to the bottom of the list.</li> </ul>  |   |
| 28 | Bring the 4 Categories we created into the body of the report.<br><i>Right Click</i> on Parent Untaxed_I, <i>Select Print</i><br><i>Right Click</i> on Parent Untaxed_P , <i>Select Print</i><br><i>Right click</i> on ParentUntaxed_Change, <i>Select Print</i><br><i>Right click</i> on ParentUntaxedChange_Y_N, <i>Select Print</i>   | When you select Print it will move the categories into the Report so when your run the repor the information will display.<br> |

**The Pell Improper Payment with Line 92 Report**

- **Roll Up Table**
  - Institutional Criteria
  - Line 92
- **Pivot Report**
  - Institutional Criteria
  - Line 92

### Step 3 – Access a Shared Report

A report created can also be shared with your colleagues. The report created in this Appendix is saved under State University College at Brockport Shared Report Folder. Remember the report is saved as a template and would run against your ISIR data in the tool. The steps below show how you can access the shared report.

|   |   |  |
|---|---|--|
| 1 | Go to the <i>Shared Reports</i> Folder  |  Shared Reports   |
| 2 | Locate <i>State University College at Brockport Folder</i> and select the plus sign.  |  SUNY BROCKPORT - FIN AID OFF   |
| 3 | Locate the <u><i>The Pell Improper Payment with Line 92 Report</i></u>  |  |
| 4 | Left click and select ' <i>Save</i> '.  |  |
| 5 | Refresh the screen  |   |
| 6 | The report will appear in your " <i>My Reports Folder</i> ", <i>Custom Reports Folder</i> " <i>Pell Improper Payment with Line 9</i> ". |  My Reports<br> Custom Reports<br> Pell Improper Payment with Line 92 |
| 7 | To run the report, left click.  |  |