



Blackbaud Professional Services

Student Billing – PowerFAIDS Integration Guide

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1 INTRODUCTION

1.1 Objective

This document serves as a guide for integrating **Student Billing™** and PowerFAIDS®. PowerFAIDS is a third-party financial aid product used to determine the financial aid awards students should, or will, receive. Successful integration involves importing anticipated aid and disbursements into **Blackbaud Student Information System™** and exporting data from student and applicant records back into PowerFAIDS.

1.2 Integration Steps

To set up the integration, consider the following elements in **Blackbaud Student Information System**:

- [Student Billing Business Rules](#)
- [Student Billing Financial Aid Items](#)
- [Student Billing Attributes](#)
- [Registrar's Office Academic Sessions](#)

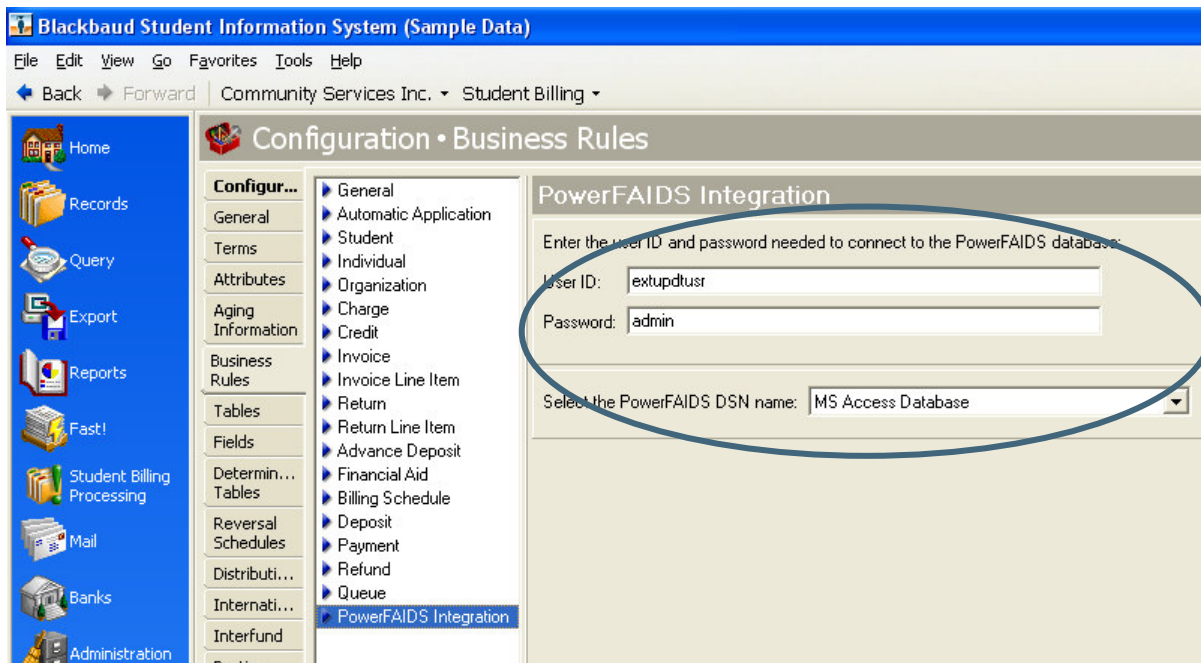
With the integration, you can complete the following processes:

- [PowerFAIDS Export](#)
- [PowerFAIDS Imports](#)

2 INTEGRATION ELEMENTS

2.1 Student Billing Business Rules

Use the PowerFAIDS Integration business rules to specify the PowerFAIDS database to which information will be exported. You must enter the following fields before exporting data to PowerFAIDS.



2.1.1 User ID

For integration to work, you must create an external update user called “extupdtusr” in PowerFAIDS. This ID is used for connecting to the PowerFAIDS database. Without this user ID, you cannot export data to PowerFAIDS.

2.1.2 Password

Enter the password for the external update user you created in PowerFAIDS. The password is used for connecting to the PowerFAIDS database. Without this password, you cannot export data to PowerFAIDS.

2.1.3 Select the PowerFAIDS DSN name

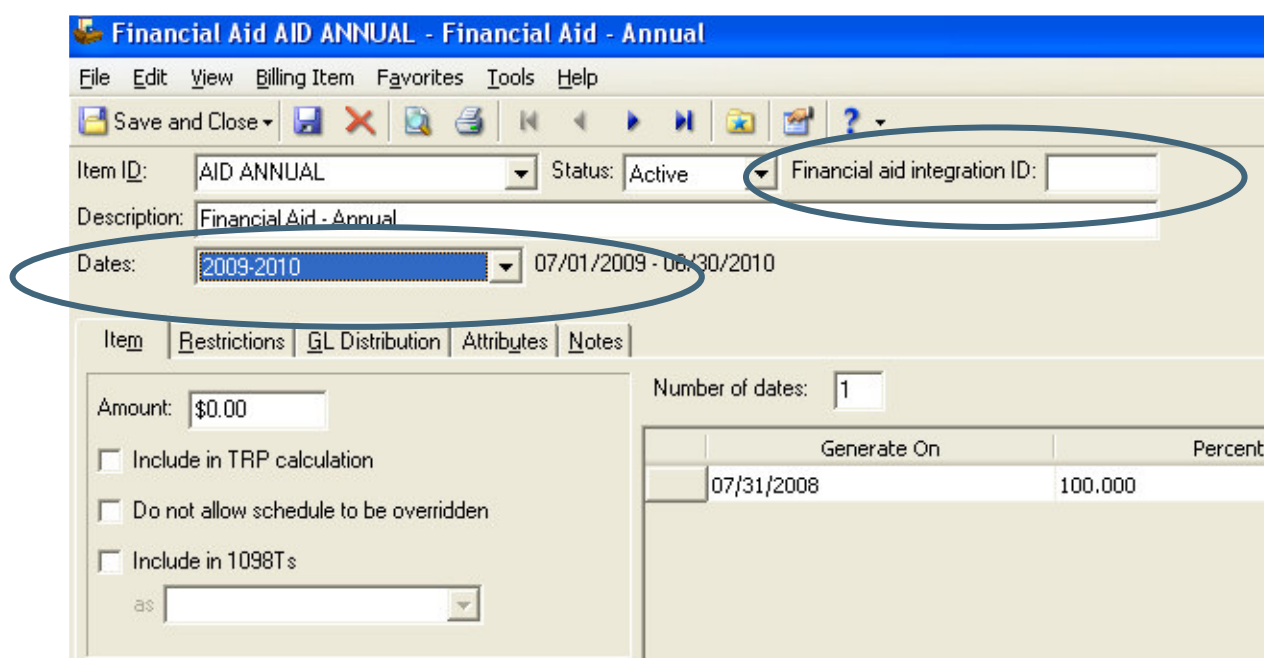
Enter the name of the System DSN you created for your PowerFAIDS database. You can select the database from the drop-down menu. This database becomes the destination for the **Student Billing** export file. The database requires an ODBC connection to the **Education Edge** server.

If you need assistance setting up the ODBC DSN, please contact PowerFAIDS Technical Support at 800-227-6734, or email pfaidssupport@cblist.org.

2.2 Student Billing Financial Aid Items

PowerFAIDS contains fund records that represent different financial aid scholarships and loans. Each fund in PowerFAIDS has integration ID (Fund ID). You can locate this integration ID in PowerFAIDS>Administration>Awarding Funds>More Fund Details. You must create a financial aid billing item for each fund in PowerFAIDS. You must enter the integration ID on the corresponding financial aid item in **Student Billing**.

The valid date range on the financial aid item can represent an entire academic year, so the billing office can use the financial aid item over multiple semesters. Importing anticipated aid from PowerFAIDS adds a financial aid schedule on the student’s record. Importing disbursements from PowerFAIDS generates the financial aid credit, so the generation date on the financial aid item is irrelevant.



2.3 Student Billing Attributes

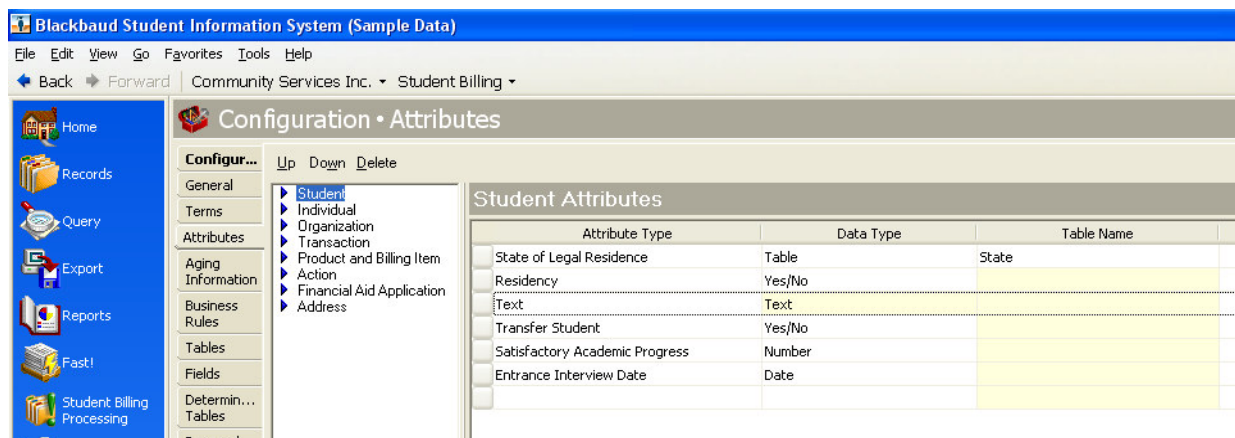
PowerFAIDS contains fields that do not currently exist in **Blackbaud Student Information System**. You can create attributes for these fields to track data in Student Information System. These attributes can be in **Student Billing, Registrar’s Office, or Admissions Office**, and can be on student, applicant, or financial aid records. Set up attributes according to the following table:

PowerFAIDS System Field Name	Notes
State of Legal Residence	Table data type Use existing State table Only short description exported
Residency	Yes/No data type
Second Bachelor’s Degree	Yes/No data type
Veteran Status	Yes/No data type
Transfer Student	Yes/No data type

PowerFAIDS System Field Name	Notes
Satisfactory Academic Progress	Number data type Value must be between 0 and 9
Entrance Interview Date	Date data type
Exit Interview Date	Date data type

Custom fields in PowerFAIDS have a unique, four-digit ID. Set up attributes using the custom field ID according to the following table:

PowerFAIDS Custom Field Data Type	Attribute Type
Numeric	Number, Date, Currency
Short Text	Yes/No, Table
Long Text	Text



2.4 Registrar’s Office Academic Sessions

PowerFAIDS contains Periods of Enrollment (POE) that represent financial aid disbursement schedules. Each POE in PowerFAIDS has integration ID (POE ID). You can locate this integration ID in PowerFAIDS>View Campus Information. You must create an academic year session for each POE in PowerFAIDS. You must enter the integration ID on the corresponding academic year session in **Registrar’s Office**. You must use the same integration ID for the same session in different schools in **Registrar’s Office**.

Fall for 2008-2009, 08/18/2008 - 05/15/2009

General | Terms | Scheduling Calendar

Session: Start date: 08/27/2008

Marking columns: End date: 12/19/2008

Timetable:

Track schedule changes beginning on:

Financial aid integration ID:

Days in session:

Sunday	Monday	Tuesday	Wednes...	Thursday	Friday	Saturday
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Available patterns:

- College (in use)

Set these marking columns as view-only in grades:

- Mid Term
- Exam Grade
- Final Grade

OK Cancel

3 INTEGRATION PROCESSES

3.1 PowerFAIDS Export

Using the PowerFAIDS Export functionality in **Student Billing**, you can export biographical, academic, and financial aid information from **Blackbaud Student Information System** into PowerFAIDS. The export functionality creates a file located in the DSN database defined in Business Rules for **Student Billing**. Then, you can import this data into PowerFAIDS.

3.1.1 Student Fields

Students must have a social security number to import and update data in PowerFAIDS.

3.1.2 Student Information System Attributes

If you created attributes for PowerFAIDS fields, you can map **Blackbaud Student Information System** fields to the appropriate fields in PowerFAIDS on the export parameter.

3.1.3 Award Year Token

The token is a four-digit number that represents the PowerFAIDS award year. The format must be YYYY and consist of the last four digits of the award year. For example, the award year of 2008-2009 has an award year token of 2009; award year 2009-2010 has an award year token of 2010.

The screenshot shows the "PowerFAIDS Export" dialog box. The "Export to:" dropdown is set to "PowerFAIDS". Under "Export records for the following", the "Academic year(s)" list includes years from 2001-2002 to 2011-2012, with "2008-2009" selected. The "Award year token:" field is circled in blue and contains "2009". The "Session:" dropdown is set to "<all sessions>". At the bottom, there are checkboxes for "Create exception query" and "Create query of students with changes", both of which are unchecked. The "Print a control report on" dropdown is set to "CutePDF Writer".

3.1.4 GPA and Credit Information

You can export GPA and credit information to PowerFAIDS. To export the most recent GPA and credit information to PowerFAIDS, we recommend you run GPA calculations before exporting.

To export the student's high school GPA, it must be set up as coming from a Feeder school. This information can be set up on the Applicant Record under the Education tab. Open the Academic Summary, and then check Past School and Feeder school.

Education for Mr. Charles Aaron

Education | Performance History | Recommendations | Attributes | Notes

Education type: Past school Feeder school

School name: Bishop John High School Address: 1332 Lee Highway
Clemson, SC 22756

Contact:

Organization type: Independent High School Phones: (803) 555-8902 (Business)

Organization ID: ORG02

Date enrolled from: to: 06/05/2005 Transcript required

Grade from: 09 to: 12 Transcript received

Reason left: Graduated

School status: Graduated

Graduation date: 06/05/2005 Class of: 2005

Enter Academic Summary... OK Cancel

3.1.5 Major Information

You can export major information to PowerFAIDS. To interpret the major correctly, the short descriptions for items in the Major/Minor code table should match the codes in the MAJOR section of the PowerFAIDS Data Dictionary. None of the short descriptions should exceed four characters, as this is the limit that PowerFAIDS will accept in the Code field. If the number exceeds four characters, the field will be truncated to four characters to meet the requirements in PowerFAIDS.

3.1.6 Applicant/Student Status

You can export the applicant or student status to PowerFAIDS. In Configuration>Tables, add a one-character short description in **Blackbaud Student Information System** for the Applicant/Student Status. This should match the codes defined in the PowerFAIDS data dictionary.

3.2 PowerFAIDS Imports

Using the PowerFAIDS Import functionality in **Student Billing**, you can import financial aid information from PowerFAIDS into **Blackbaud Student Information System**. First, create an export file from PowerFAIDS to a specified location. This file will have a .pf extension. Then, use the import functionality to import financial aid

information into **Student Billing**. From PowerFAIDS, you can import two types of information into **Student Billing**: anticipated aid and disbursements.

3.2.1 Anticipated Aid

Anticipated aid is used to show the expected amount of financial aid the student should receive for a particular semester based on the needs analysis and packaging. This amount is used to reduce the balance displayed on the statement so that the student can accurately determine the amount due.

You can use the anticipated aid extract functionality in PowerFAIDS to create a file of estimated aid for student billing purposes. It reports the total scheduled disbursement for an award for a specific period of enrollment, as well as any amount paid, and creates a file to import into other systems. Importing anticipated aid from PowerFAIDS adds a financial aid schedule on the student's record.

3.2.2 Anticipated Aid Updates

You can import anticipated aid updates from PowerFAIDS. If a matching transaction is found, the system will also need to check the existing scheduled credits for the transaction found. The date in the "As of Date" field in the file will be compared to the Scheduled Credits of the financial aid transaction to determine if an existing credit is present.

If there is one scheduled credit for the date specified, the amount of the scheduled credit will be compared to the Disbursement Amount to see if they are equal.

If the amounts are equal, no change will be made and the system will go to the next row in the file. This row will be considered successful and will display in the successful students section with the following comment: "Scheduled credit already exists for the same amount."

If they are not equal, the system will update the scheduled credit with the disbursement amount from the row in the file. This will also update the financial aid transaction's amount. This row will be considered successful and will display in the successful students section with the following comment: "Scheduled credit updated using the specified amount."

3.2.3 Disbursements

A disbursement is defined as the transfer of funds by the lender to the school or escrow agent. Money is disbursed to a student or a student's account when the money is received from whatever institution is funding the financial aid. Disbursement in PowerFAIDS allows you to control the amount and the timing of financial aid payments based on the tracking status and parameters specified.

PowerFAIDS creates an electronic file of transactions to import into other campus systems. You can specify the students to include in the Disbursement Roster. For Disbursements in PowerFAIDS, you can choose between a Standard Disbursement Roster and an Expanded Disbursement Roster, which determines the fields available to import into **Blackbaud Student Information System**. You can import either standard or expanded disbursements; there is no difference in **Student Billing** with these options. Importing disbursements from PowerFAIDS generates the financial aid credit.