

Completing the Institutional Appendix (for B.C. Public Institutions)

1 Purpose

This document is a reference guide for B.C. public institutions when completing the institutional appendix. In this guide you will find information on how to:

- Install PuTTY (SFAS) on your computer
- <u>Configure PuTTY</u>
- <u>Review and update institution program codes (Rule 14 P table)</u>
- Load the institutional appendix
- View IA data for a given program year

2 Institutional appendix (IA)

BC Public Institutions record information for SABC eligible programs in the Institutional Appendix IA of the Student Financial Aid System (SFAS/Putty). What is the Institutional Appendix? The IA is a part of the Student Financial Assistance System (SFAS) where B.C. Public Institutions can enter their program information.

B.C. Public Institutions are responsible for ensuring the programs they enter in the IA meet the SABC program eligibility criteria identified in the StudentAid BC Policy Manual to be eligible for SABC funding.

Programs must be entered in the IA every program year for the program to be eligible for SABC funding.

3 Instructions for completing the institutional appendix

When completing the IA:

- Ensure all sections of the Rule_14_P table are accurate before completing the IA.
- Ensure that you complete the IA for the upcoming program year. Program year runs from August 1 to July 31.
- Do not make modifications to the current program year Rule_14_P table or IA as this will impact students currently funded.
- Note that our Student Financial Aid System (SFAS) only accepts whole numbers. Round all numeric values containing decimals to the nearest whole number (hours, costs, number of weeks, academic credits, etc.). For example, 25.5 hours must be entered as 26 hours.
- Ensure that all programs adhere to the *Breaks in* Study policy as outlined in the <u>StudentAid</u> <u>BC Policy Manual</u>.

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- Align the tuition amounts reported on each line of the IA with what would be charged to a student enrolled in that study period.
- Report programs longer than 52 weeks on multiple lines in the IA broken down into years (each year must be at least 12 weeks in length). Each line must have a study period start and end date that aligns with how a student will apply for student financial assistance.
- Retain a copy of the IA at your institution for verification purposes



3.1 Install PuTTY (SFAS) on your computer

Step 1:

Visit <u>http://www.putty.org/</u>

Step 2:

Locate the putty.exe file and save it anywhere on your computer.

Windows on A	rm individual executables		
64-bit Arm:	putty.exe	(or by FTP)	(signature)
		< 1 mms)	1 · · · · ·

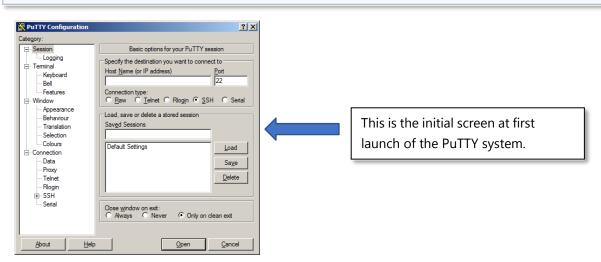
Step 3:

Open the .exe file and you are ready to configure the PuTTY.



3.2 Configure PuTTY

Configuration is a one-time setup and is the initial screen that appears when you launch PuTTY for the first time.



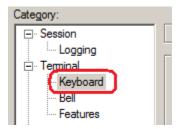
Step 4:

Type *sfasprod.gov.bc.ca* in the Host Name field.

Specify the destination you want to con-	INCCL IU
Host Name (or IP address)	Port
sfasprod.gov.bc.ca	22
Connection type:	
🔿 Raw 👘 Telnet 🔘 Blogin 🙆 S	SH Conservation Service

Step 5:

Select *Keyboard* from the left-hand menu labelled *Category*.



Step 6: Select the radio button labelled *VT400.*





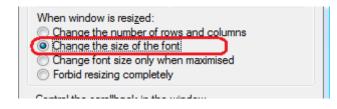
Step 7:

Select Window from the left-hand menu Category.

🕵 PuTTY Configuration
Category:
Logging
Keyboard
Bell
Eestures
- Window
Appearance
Behaviour
Translation

Step 8:

Select the radio button change the size of the font.



Step 9:

Set the *Lines of scroll back* to 2000.

Control the scrollback in the window				
Lines of scrollback (2000				
Display scrollbar				

Step 10:

Select Session from the left-hand menu Category.

Category:	
I Session	Basic options for you
	Specify the destination you wa
⊡ ·· Terminal ···· Keyboard	Host <u>N</u> ame (or IP address)
(w)oodid	· · · ·

Step 11:

Type a name for this collection of settings (*Saved Session*) then click *Save*. This example uses the name *SFAS PROD*.

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Load, save or delete a stored session	
Saved Sessions	-
SFAS PROD]
Default Settings	Load
	Sa <u>v</u> e
	Delete

Step 12:

Select the *Open* button to log into SFAS.

Rlogin ⊕ SSH					
Serial	Close <u>w</u> indow on exit:				
About <u>H</u> elp					

Step 13:

Select YES when the PuTTY security alert appears.

	If you trust this host, hit Yes to add the key to PuTTY's cache and carry on connecting. If you want to carry on connecting just once, without adding the key to the cache, hit No. If you do not trust this host, hit Cancel to abandon the connection.
(Yes No Cancel Help

Step 14:

You are now ready to log in to SFAS.

🥵 gemini.gov.bc.ca - PuTTY	
login as:	*



3.3 Review and update institution program codes (Rule_14_P table)

You will be given annual write access to the Rule_14_P screen to make edits to the program codes already prepopulated from the previous program year. Only those who have access to the IA will have access to make any changes in the Rule_14_P table.

Ensure that you do not make any adjustments to the previous year's record as this could affect current student applications.

After completing your updates for the current program year, review your information and email a signed copy to IPDT.

Begin entering your IA for the current program year once all programs have been populated in the Rule_14_P.

Step 1:

Locate the Rule_14_P screen.

Madair				
Mode:F <u> </u>	То	Rule_14_P	Help	
ACTION: 10	10	Rule_14_P	нетр	

Step 2: Enter F or S in the action field at the bottom of the screen. F = Find all your institution's program descriptions S = Select a certain program description

Step 3:

Enter your institution's 4-digit code, as well as the upcoming program year.

The following information will appear for each program displayed alphabetically by program description:

- Program code
- Requirement of an Appendix 3 Institution and Program Information (you can decide if you wish to have an Appendix 3 Institution and Program Information generate automatically for each student that applies to this program)
- Length of the program (in years). The length of the program should reflect the entire length of the program, not just the portion completed at your institution.



Length of Program Tips for laddering programs:

Where a certificate can lead into a degree or diploma, the program will need to be entered to reflect the different credentials and program lengths available to the student.

Where years of a program are delivered at two institutions, each institution should include the entire length of the program in this section.

• Program description (program descriptions cannot exceed 100 characters)

Step 4:

Verify that the information for each program is correct. Screen Commands:

```
D-# (line number) = Will delete the row selected D = Will delete the full page of
```

displayed records *A* = Will add a new record

= Will allow your cursor into an existing line to edit

- *Ctrl B* = Will display the current description
- *Ctrl A* = Will allow character

insertion Page & Full = Print commands

Things to remember:

- SFAS will not allow you to revise the program code when editing a program description
- Editable fields are: Appendix 3 required, total length of study, and program description
- You can decide to have an Appendix 3 Institution and Program Information
- generate automatically for each student that applies to this program. Simply indicate *Y* in the *apdx 3 req* field.
- Program descriptions you use on the Rule_14_P table will be displayed on the SABC online application for students to select. If you have a program that has the same description but offers two different credentials, incorporate the name of the credential in the description (i.e., Bachelor of Business Administration, Diploma in Business Administration, etc.)

Step 5:

Print a list of all programs.

Page = Will print the first page only

Full = Will print all programs for the current program year



Each print command will display a screen with four options. Select 1 *Print report on local, attached printer* to start the print job.

Shortcut to finding a single program

- Type *S* in the *action* field and press enter
- Type in your institution code and press enter
- Type in the upcoming program year and press enter (Press enter again to remove the pop message)
- Type 1 in the *action* field and press enter
- Type the specific program code and press enter
- Continue to hit enter until the program description appears
- Select the line number to edit the program description

Follow the previous instructions to select a group of programs that start with the same program code. Type the first two letters of the program code followed by the @ symbol. This will bring up all programs with the prefix of what you entered (i.e., *ZI*@ will bring up all programs that start with ZI).



3.4 Load the institutional appendix

Step 1:

5	tional appendix for the upcoming year, yo - <i>Maintain Institution Appendix</i> screen in S	5
PROD 2020-JAN-30	Student Financial Assi [INAPPEN] Maintain Insti	
01 Program Year: 02 Institution>	Start:	End:
03 Field>	Area>	Level>
Enter <i>F</i> in the <i>action</i>Enter the previous	<i>n</i> field program year, institution code and an ex	isting program code
For your IA load to be succ	essful, all program codes must be presen g the Rule_14_P table are in section X.3.3	

Using the WS_FTP Pro software system, move your IA file from your computer to your SFAS directory.

Local System					Remote Site					
× ×				<u> </u>	AVEDSDISKS: [AVED.SFT.USERS.AE_IER_PILO]					R_PILO
^	Name	Date	Size	ChaDir		^	Name	1	Date	Size
CS	L_Disbursea~	040811 12:42				t				
CS	L_Disbursea~	040819 11:39		MkDir		ACCE:	SS.LOG;1	040408	10:28	1024
Go	vt logo.doc	040707 22:02	1			CLAI	M-2722528~	050202	11:50	49664
gr.	ant for V s~	050117 15:34				T CLAI	M-2722528~	030325	15:17	876544
IN	IN SEC.doc	040316 17:50		Maria		T CLAI	M-6398377~	030325	15:17	876544
IN	STAPDX DAT	050513 12:17		View		CLAI	M-7253906~	030325	15:17	876544
iv:	r settings.~	041116 12:48		Exec		T CONR	_008.OK;4	980529	17:19	512
		041014 12:05		Fuer			SERVER . LO~	050128	17:33	1536
	ave.xls	041014 12:07		Rename		INST.	APDX DAT: ~	050513	12:22	7680
I Lu	cy Cert.ccf	040707 22:18	13			INST.	APDX.OLD;~	050128	17:34	512
		031107 15:26		Delete		INST.	PROG. TXT:~	050303	10:00	1536
		040608 17:33		D.C.A		I LOGI	N.COM:1	940616	11:49	512
		040618 10:45		Refresh			STRY.SIN;~	961218	15:42	1536
	one #.doc	050330 11:43		Dirlnfo		and a second	14.COM; 1~	050126	16:17	512
	TTY. RND	050513 12:13					14 P.COM~			512
	r3110.txt	041116 13:12					OAD.TXT:1			40960
		041116 13:43								
	r3581.doc	040526 09:02			->					
	r3582.doc	040526 09:12								

Step 2:



Verify that you have moved the file successfully to SFAS by typing the *View* command in the *Action* field of the INAPPEN screen.



The file should display as shown below. Use the up and down arrows to view the file and *Ctrl Z* to exit.

Tellection 1 - SFASTEST.R1W
File Edit Connection Setup Script Window Help
_ _ _ _ _
1AJABINST. APPENDIX 2005200620050511
2PAS81200602062006063017024500000175000063900
2PBX71200509062006042834059200000250000193000
2PBX7220050906200604283405735000200000018500
2PBX73200509062006042834055500000450000176500
2PCR81200509062005123017015000000250000023500
2PCR81200601092006042813015000000250000023500
2PGL81200509062005123017009000000250000047500
2PGL8120060109200604281300900000250000047500
2PGU72200509062006042834073500000100000041500 2PHX7120050906200604283403000000200000018500
2111/1200303002000420340300000200000018300

Step 3:

Upload your file by typing *Load* in the *action* field and press enter

Step 4:

Press enter to continue.

```
*I* Looking for file INSTAPDX.DAT in home directory and verifying file format. Press return to continue...
```

Step 5:

Press enter to continue.

```
*I* Converting file INSTAPDX.DAT. Press return to continue...
```

Step 6: Press *enter* to continue.

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If you receive an error message regarding field of study, number of weeks, or that a program code in the IA has not been approved and entered in the Rule_14_P table, please review, correct the error and upload the file again.

All information on the IA must match the information on the Rule_14_P table.

Step 7:

When the upload is error-free, you will receive the message shown below. Press *enter* to continue.



Step 8:

The system will report when the data load is complete and will indicate how many records were loaded. Press *enter* to continue.

	loaded: 151. Records updated:	0.
Renaming file. Press return	to continue	

Step 9:

Find the newly loaded data in the *INAPPEN* screen.

Enter *F* in the *action* field and enter your program year, institution code and any program code that was in the new load.

Step 10:

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Enter *Full* in the *action* field and press enter to print a full list of all programs.

Step 11:

Select option 1, *Print report on local, attached printer* and press enter.

Step 12:

Review documents to ensure all programs have been loaded. Then sign off and email a copy to IPDT and keep a copy at your institution for verification purposes.



3.5 View IA data for a given program year

Step 1:

From the SFAS top menu type *TO* and *Rule_14_Q* in the *action* field.

Mode:F				
Action:TO	То	Rule 14 Q	Help	

You will have *Read Only* access to this.

Step 2:

Enter *F* in the *action* field, then enter your institution code and program year.

This will bring up all records on the IA for that program year. You can navigate through the pages using either the *Page down* key or the down arrow. To search a specific code or group of codes, proceed to the next step from this screen.

Step 3:

You must first search the full data set of the IA in order to search for a specific code or group of codes.

Enter *S* in the *action* field, then input the institution code and the program year. Once your cursor is under the *F*>*A*>*L*> section, enter the first letter or first three letters that you wish to search, and press *enter*.

F	>A>	L>	Study Area Desc	YR	WK	Start
Ρ	AS	8	COOK LEVEL1 HOTEL/RE	1	22	05-FEE
Ρ	CR	8	ELECTRICAL TRADE ENT	1	17	_04-SEF
Ρ	CR	8	ELECTRICAL TRADE ENT	1	17	_05-JAN