

# 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](#)
- [Configure PuTTY](#)
- [Review and update institution program codes \(Rule 14 P table\)](#)
- [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).

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 [StudentAid BC Policy Manual](#).

### 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.

- 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 <http://www.putty.org/>

*Step 2:*

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

**Windows on Arm individual executables**

64-bit Arm: [putty.exe](#)

[\(or by FTP\)](#)

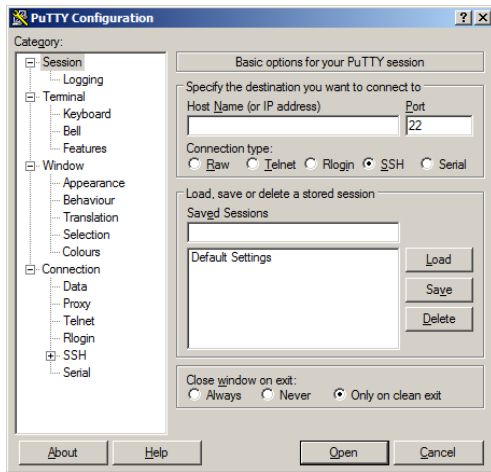
[\(signature\)](#)

*Step 3:*

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

### 3.2 Configure PuTTY

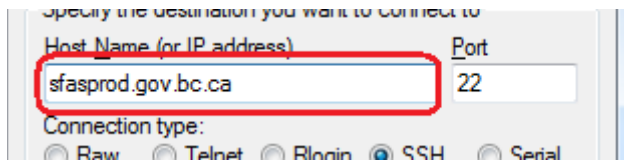
Configuration is a one-time setup and is the initial screen that appears when you launch PuTTY for the first time.



This is the initial screen at first launch of the PuTTY system.

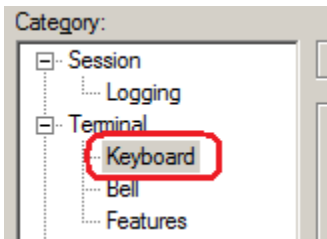
**Step 4:**

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



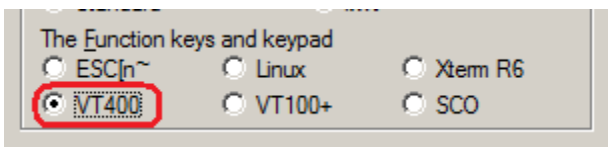
**Step 5:**

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



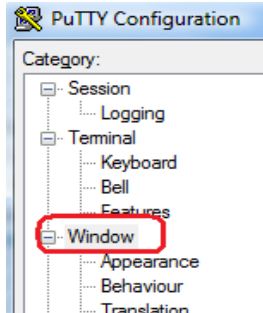
**Step 6:**

Select the radio button labelled *VT400*.



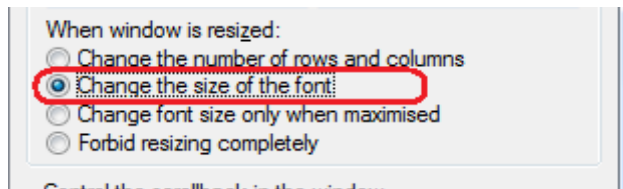
**Step 7:**

Select *Window* from the left-hand menu *Category*.



**Step 8:**

Select the radio button *change the size of the font*.



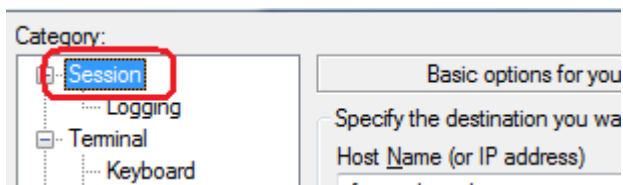
**Step 9:**

Set the *Lines of scroll* back to 2000.



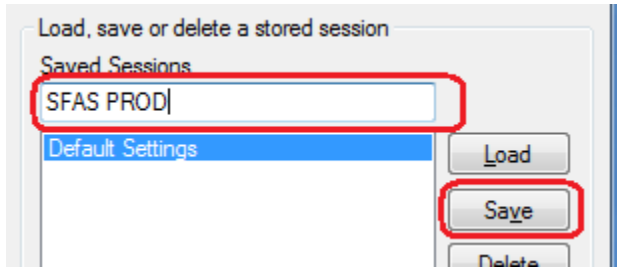
**Step 10:**

Select *Session* from the left-hand menu *Category*.



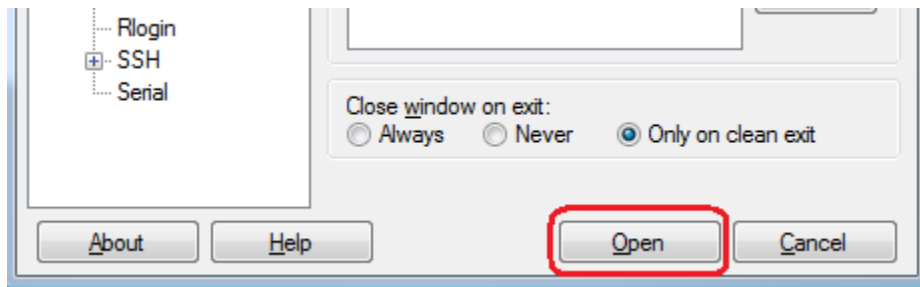
**Step 11:**

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



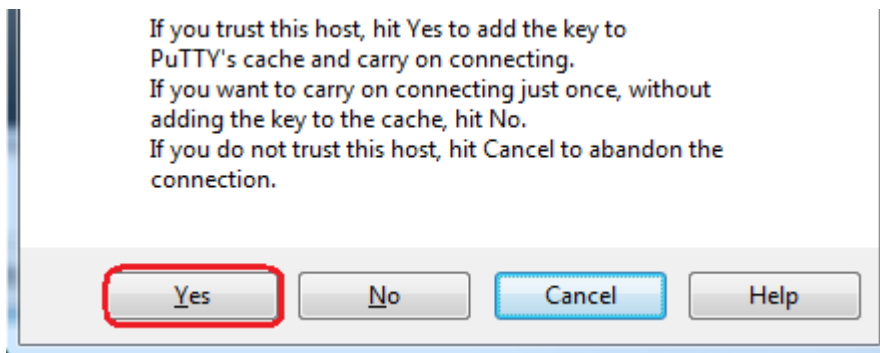
**Step 12:**

Select the *Open* button to log into SFAS.



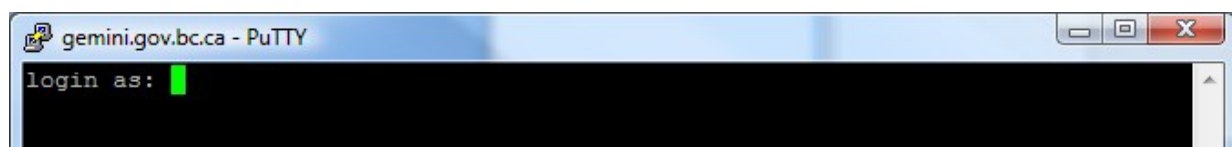
**Step 13:**

Select *YES* when the PuTTY security alert appears.



**Step 14:**

You are now ready to log in to SFAS.



### 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.

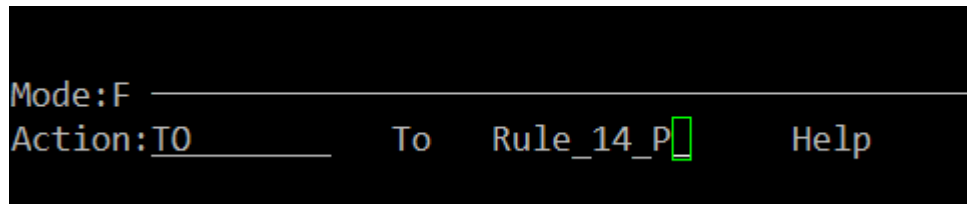
Ensure that you do not make any adjustments to the previous year's record as this could affect current student applications.

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.



#### 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

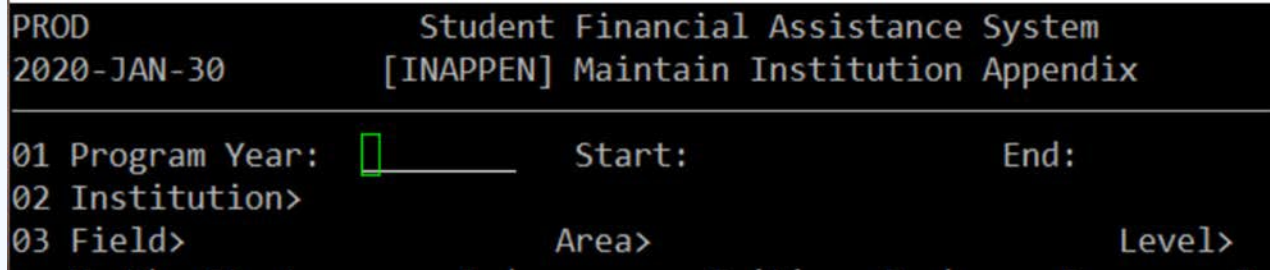
- Type *S* in the *action* field and press enter
- Type in your institution code and press enter
- Type in the upcoming program year and press enter (Press enter again to remove the pop message)
- Type 1 in the *action* field and press enter
- Type the specific program code and press enter
- Continue 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:**

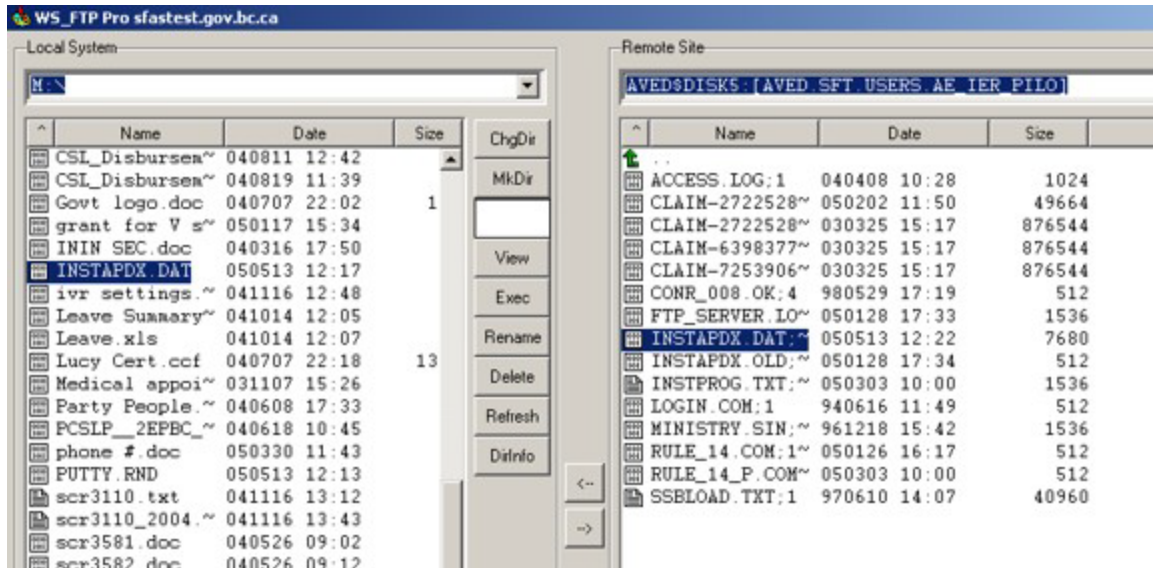
Prior to loading the institutional appendix for the upcoming year, you must first access an existing IA record on the *INAPPEN – Maintain Institution Appendix* screen in SFAS.



- Enter *F* in the *action* field
- Enter the previous program year, institution code and an existing program code

For your IA load to be successful, all program codes must be present on the Rule\_14\_P table (instructions on completing the Rule\_14\_P table are in section X.3.3 of this job aid).

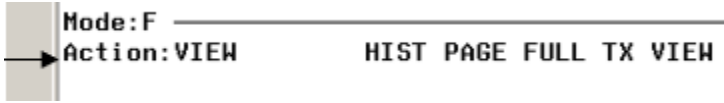
Using the WS\_FTP Pro software system, move your IA file from your computer to your SFAS directory.



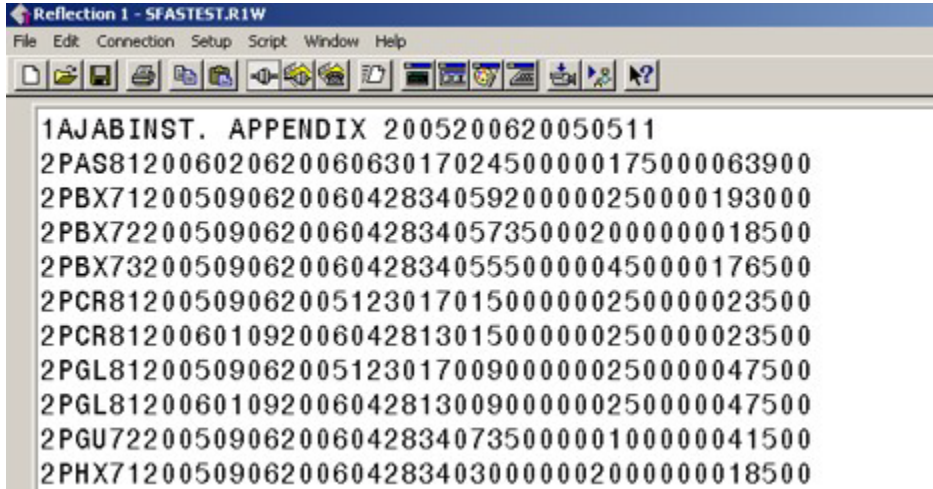
**Step 2:**

Completing the Institutional Appendix

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.



**Step 3:**

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

**Step 4:**

Press *enter* to continue.



**Step 5:**

Press *enter* to continue.



**Step 6:**

Press *enter* to continue.

```
*I* Verifying data of INSTAPDX.DAT. Press return to  
continue...
```

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.

```
*I* Loading INSTAPDX.DAT. Please wait. Press return 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.

```
Data load finished. Records 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:

Completing the Institutional Appendix

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.



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
P AS	8	COOK LEVEL1 HOTEL/RE	1	22	05-FEE
P CR	8	ELECTRICAL TRADE ENT	1	17	04-SEP
P CR	8	ELECTRICAL TRADE ENT	1	17	05-JAN