

# Managing Multiple Reporting: Suggested Workflow & Managing MRRs within Colleague



Brandi J. Massey  
NC Community College System  
[masseyb@nccommunitycolleges.edu](mailto:masseyb@nccommunitycolleges.edu)

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# Session Rules of Etiquette

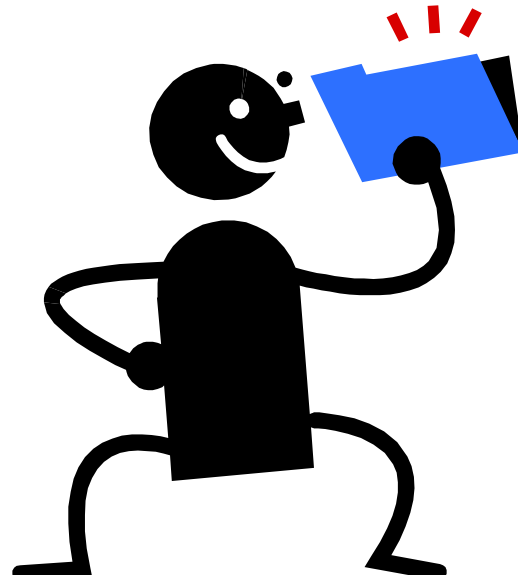
- ❖ Please turn off your cell phone.
- ❖ If you must leave the session early, please do so as discreetly as possible.
- ❖ Please avoid side conversation during the session.

**Thank you for your cooperation!**

# Overview

- ❖ **Students are not allowed to receive Pell funds from more than one school for the same enrollment period. To prevent this from happening, the Common Origination and Disbursement (COD) System sends out Multiple Report Records (MRRs).**
- ❖ **This presentation will show you ways to identify, track, and resolve MRRs all within Colleague.**

# Multiple Record Reporting (MRRs)



# Primary Types of MRRs

## ❖ Multiple Reporting Records (MRR)

- Students are not allowed to receive Pell funds from more than one school for the same enrollment period. To prevent this from happening, the Common Origination and Disbursement (COD) System sends out Multiple Report Records (MRRs).

## ❖ Pell Overaward Process (POP)

- If the combination of Pell fund disbursements at the different institutions puts the student over the scheduled award amount, the student is automatically entered into the Potential Overaward Process (POP).

# Record Types: MRR & POP

- ❖ **MRRs should be reviewed in a timely manner to:**
  - Eliminate possible POP situation
  - Reduce delay of a student's future refunds
  
- ❖ **POPs should be reviewed in a timely manner to:**
  - Eliminate disbursements to student to zero

# MRR Record Types

<b>RO</b>	<b>Originated Institution</b>
<b>RD</b>	<b>Disbursed Institution</b>
<b>RN</b>	<b>No MRR Information Found</b>
<b>CE</b>	<b>Concurrent Enrollment Institution</b>
<b>PB</b>	<b>Blocked Institution</b>
<b>PR</b>	<b>Blocker Institution</b>
<b>PU</b>	<b>Unblocked Institution</b>
<b>BC</b>	<b>Blocked and Concurrent Enrollment</b>
<b>RC</b>	<b>Blocker and Concurrent Enrollment</b>

# POP Types

<b>PB</b>	The student is in a POP situation. The school listed was not the first school that disbursed funds to the student.
<b>PR</b>	The student is in a POP situation. The school listed on the MRR was the first school to disburse funds to the student.
<b>PU</b>	The student is no longer in a POP situation.
<b>BC</b>	The student is in a POP condition and is concurrently enrolled. The school listed on the MRR was not the first that disbursed funds to the student.
<b>RC</b>	The student is in a POP condition and is concurrently enrolled. The school listed on the MRR was the first school to disburse funds to the student.



# COD Reports

- ❖ **MRR and/or Pell POP Reports are automatically sent to your institution's SAIG mailbox**
  - **Imported into Colleague**
    - **PGMRyyOP**
    - **PGPRyyOP**

# FAUP – FA Update Parameters

**FAUP - FA Update Parameters**

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**Imported** **File Types to Update**

COD XML

NSLDS Exit Interview  Yes

NSLDS Monitoring  Yes

**MRR**  Yes

SAS  Yes

ESOA  Yes

Recon  Yes

PROFILE/NCP

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**Updated Records**

**Report**

COD Student  No

**Report** **SSN Option** **Output Saved List Name** **Ext**

Interview  Yes

**CM Code**

NSLDS Monitoring

**Options**

PROFILE/NCP

# FAIM – FA Imports

**FAIM - FA Imports**

Unprocessed

	# Files		# Files
FTP.RECEIVE.DIR	0	PROFILE	0
FA.RECEIVE.DIR	8	CommonLine	0
COD XML	0	Ministry	0
ESOA	0		
RECON	0		
MRR	0		
SAS	0		
Interviews	0		
NSLDS Monitoring	0		

---

Text Type Files

Text	2	<b>Pell POP files</b>
Unidentified	3	

---

COD History

SAIG Archives	32
DOEI Import Log	41

# Pell POP Text File

DOEI\_CODYD\_37655\_16984\_6

Save Cancel Timestamp Find... Find Next

```
O*N05TG71900      ,CLS=PGPR14OP,XXX,BAT=
#Z201400808720140629133516,NCT=000000
GRANT HDR 0080#Z201400808720140629133516
2014062900000000000000000000000000000000
-----
-----
Run Date: 06/29/2014      U.S. Department of Education      Page
1 of 1
Run Time: 13:35:08 ET      Federal Pell Grant Program
Pell POP Report
For Award Year: 2013-2014
**THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY
ACT**
Rep Schl Pell ID: 008087      Rep Schl RID:
60545861
Rep Schl Name:      MONTGOMERY COMMUNITY COLLEGE
Att Schl Pell ID: 008087      Att Schl RID:
60545861
Att Schl Name:      MONTGOMERY COMMUNITY COLLEGE
-----
```

# FAIM – FA Imports

**FAIM - FA Imports**

Unprocessed

	# Files
FTP.RECEIVE.DIR	0
FA.RECEIVE.DIR	8
COD XML	0
ESOA	0
RECON	0
<b>MRR</b>	0
SAS	0
Interviews	0
NSLDS Monitoring	0

	# Files
PROFILE	0
CommonLine	0
Ministry	0

**MRR files**

Text Type Files

Text	2
Unidentified	3

COD History

SAIG Archives	32
DOEI Import Log	41

# MRLR – MRR Listings

**MRLR - MRR Listings**

Academic Year

Processing Type

Unresolved Only

Received Date Range

SSN Display Option

Saved List Name of Student IDs

Students

ID	Students
1	
2	
3	
4	

Additional Selection Criteria

# MRLR Report

Jul 10 14  
10:31

PELL MRR LISTINGS  
For Financial Aid Year 2013

Page 1

Student ID	SSN	Name	Rcd Ty	Received Date	Resolved Date
		Adrian L.	CE	05/02/14	
		Kristen B.	CE	05/02/14	
			CE	03/10/14	
		Soisuda D.	CE	06/16/14	
			CE	03/10/14	
		Mark D.	CE	02/05/14	
			CE	02/21/14	
			CE	03/10/14	
		Jennyfer L.	CE	02/19/14	
			CE	06/23/14	
		Delores A.	CE	06/18/14	
		Jordan L.	CE	10/02/13	
			CE	02/19/14	
			CE	05/22/14	
			RC	06/18/14	
		Dekota B.	CE	02/19/14	
			CE	05/02/14	
			CE	05/02/14	
		Ahmad J.	CE	10/02/13	
			CE	10/04/13	
		Chelsea S.	CE	03/10/14	
		Angelia B.	CE	02/19/14	
		Benaldine H.	CE	02/19/14	
		Carlliesha G.	PB	01/23/14	
			PU	02/26/14	
		Satoya C.	CE	02/19/14	
			CE	02/19/14	
			CE	05/02/14	
			CE	06/23/14	
		Cathy D.	CE	02/19/14	
			CE	05/22/14	
0446964	244-47-8585	Jordan, Ashley S.	CE	02/19/14	
0446976	238-81-4112	Leake, Elise G.	CE	02/19/14	
			CE	02/19/14	
			CE	05/22/14	
			CE	05/22/14	

# Reviewing & Resolving MRRs





# Review MRR Student Information

**AIDE - Award Detail Entry** 2013 2013FA

Dep	COA	FC	Need	UCost	UNeed		
CB	13,525	0				Awarded	2,822.00
Inst	13,525	0				Accepted	2,822.00
Pell	13,525	0				FT Ent	5,645

Award	Description	A/R-Cred	CWS-Earn
1 VAMGI	VETERANS ADMINISTRATI		
2 FPELL	Federal Pell Grant	2,822.00	
3			
4			

Awd Per	Amount	Act	D			TIV	Exp	Act	Exp	Act
						En	Res	Res	Hsg	Hsg
1 2013FA	0.00	A	04/21/14		12.00	F		IN		No
2 2014SP	2,822.00	A	04/21/14		12.00	F		IN		No
3 2014SU					12.00	F		IN		No
4										

AtP Pkg NASU Cmnt X Oth CORE Acad

**Menu**

Select Item

- PLCD - Pell COD Disbursements
- APED - Additional Pell Elig Data View
- DAV - Detail Award View
- PCOD - Pell COD Inquiry
- AWHT - Award History

Selected Item

# PCOD - Pell COD Inquiry

AIDE - Award Detail Entry | **PCOD - Pell COD Inquiry**

Year : 2013

### Pell Award Information

Attended Campus	School Awd Amt	School YTD Xmit	School 1st Sent	School Lst Sent	School Sent Amt	Resp Ind	COD	Recon
1   60545861	2822.00	2822.00	04/28/14	04/28/14	2822.00	A	2822.00	
2								

### Pell Disbursement Summary

Attended Campus	Award Period	Disb Nbr Sys Gen	Seq Nbr RespInd	School/COD Disb Amt	Response Disb Dt	Records Sent/Rcvd
1   60545861	2014SP	1	1	2822.00	04/22/14	04/28/14
		N	A	2822.00		05/02/14
2						
3						
Student MRRs				Recon YTD Amt	\$0.00	
Comments					Crnt Xmit Amt	\$2822.00

# PMRR – Pell MRR

AIDE - Award Detail Entry    PCOD - Pell COD Inquiry    **PMRR - Pell Multi Reporting Records**

Year : 2013

Student MRRs

Seq No	Rec
1	05/02/14
2	05/02/14
3	
4	
5	
6	
7	
8	
9	
10	

Page 1 of 1

# SMRR - Student MRR

AIDE - Award Detail Entry | PCOD - Pell COD Inquiry | PMRR - Pell Multi Reporting Records | **SMRR - Student MRR**

Year : 2013

**Enter Resolved date and appropriate comments**

MRR ID  Resolved Dt

**Colleague Generated**

Received Date  Comments

MRR Inst ID

RR Student ID

Orig SSN

Orig Name Code

**Record Type**

Requesting Inst ID

MRR Code 1

MRR Code 2

9/11 Vet Dep Flag

Sched/Orig Amt	<input type="text" value="5645.00"/>	<input type="text" value="2823.00"/>
EFC/Trans Nbr	<input type="text" value="0"/>	<input type="text" value="2"/>
Enrl/Orig Date	<input type="text" value="08/19/13"/>	<input type="text" value="09/17/13"/>
Next Disb/Last Act	<input type="text"/>	<input type="text" value="09/17/13"/>
Acc Disb/Elig Used	<input type="text" value="2823.00"/>	<input type="text" value="40.37"/>
ED Use Flags	<input type="text" value="0010000000"/>	
Percent Used	<input type="text" value="50.0088"/>	

**Other Institution & FAA Information**

Email Addr

Name  Pell ID

Phone  Name

Fax  Addr

CSZ  NC

# Understanding the Data

- ❖ When reviewing MRRs data in a timely manner, it is not necessary to retrieve information from COD.
  - Institutional information listed on SMRR
- ❖ Reduce, adjust, or cancel funds in adherence to Federal Regulation and institutional policy
  - Adjustments should be sent to COD via next CODE export.

Sched/Orig Amt	5645.00	2823.00
EFC/Trans Nbr	0	2
Enrl/Orig Date	08/19/13	09/17/13
Next Disb/Last Act		09/17/13
Acc Disb/Elig Used	2823.00	40.37
ED Use Flags	0010000000	
Percent Used	50.0088	

# Updating the Enrollment Period

**AIDE - Award Detail Entry**

2013      2013FA

Dep	COA	FC	Need	UCost	UNeed	Awarded
CB	13,525	0	13,525	10,703	10,703	2,822.00
Inst	13,525	0	13,525	10,703	10,703	2,822.00
Pell	13,525					FT Ent 5,645

Award	Description	Date	A/R-Cred
1 VAMGI	VETERANS ADMINISTR	3/24/14	
2 FPELL	Federal Pell Grant	4/21/14	2,822.00
3			
4			

Awd Per	Amount	TIV Cr	TIV En	Exp Res	Act Res
1 2013FA	0.00		F		IN
2 2014SP	2,822.00	13.00	F		IN
3 2014SU		12.00	F		IN
4					

AtP      Pkg      NASU      Cmnt X      Oth      CORE

**Menu**

Select Item

- PLCD - Pell COD Disbursements
- APED - Additional Pell Elig Data View
- DAV - Detail Award View
- PCOD - Pell COD Inquiry
- AWHT - Award History

Selected Item

OK      Cancel      Help

# PLCD – Enrollment Period

AIDE - Award Detail Entry **PLCD - Pell COD Disbursements** Year : 2013

**Enter student's last day of attendance.**

Award **FPELL** Dependency Status **1** Full Pell Elig Data

Tran No	Corr	Full Time Entitlement	Dec Vet Indicator	Pct Elig Used	Enrollment Date
Active <b>02</b>	<input type="checkbox"/>	<b>5645</b>	<input type="checkbox"/>	<b>0.0000</b>	<b>08/19/13</b>
Awarded <b>02</b>	<input type="checkbox"/>	<b>5645</b>	<input type="checkbox"/>	<b>0.0000</b>	<input type="text"/>
Override <input type="checkbox"/>			<input type="text"/>	<b>0.0000</b>	<input type="text"/>

2009-Dec Vet Flag

Disbursement Code **2013** Pct LEU **403.695**

Pre 2008 Low Tuition Ind

Disbursement Information

	Date	Anticipated Weight	Amount	Award Period	Man Chg	Routing ID	Last Date	Xmit Amount	Init Xmit Date
1	08/09/13	1.00	0.00	2013FA	Yes	60545861			
2	01/02/14	1.00	2822.00	2014SP	Yes	60545861	04/22/14	2822.00	04/22/14
3	05/12/14	1.00		2014SU		60545861			
4									
5									
<b>Totals</b>			<b>2822.00</b>						<b>2822.00</b>

# Notifying Students





# Letters/Emails

- ❖ **For students concurrently enrolled at your institution:**
  - **Create a Word document/Email on DOC**
  - **Customize verbiage needed for student**

# DOC - Letter

**DOC - Document Codes**

Document Name : FAMRR

Description:

Document Type:

Office Code:

Author:

Receipt Numbers:

History Type:

Send Multiple:

Print Day:

Grouping Name:

Print Actions:

History Actions:

Name/Addr Hierarchy:

Mail Type:

Merge File:

Document Paragraphs:

Document File Setup:

Hardcopy Document Options:

E-Mail Document Options:

FA Year:

# DFS – Document File Setup

DOC - Document Codes | **DFS - Document File Setup**

Document Name : FAMRR Multply Reporting Letter  
 Document Type : WINTEG.WRD50025 Updated MS WORD for Wind

Merge File  Scan Document   
 Document File  Scan Start Char    
 Output File  Scan End Char    
 Subroutine Name

Dictionary Fields						Page 1 of 2	
Field Name / Pointer	Length	Just	Fill	Tr			Max
1 FIRST.NAME <input type="text" value="LTREQ.PERSON"/>	30	L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
2 ID <input type="text" value="LTREQ.PERSON"/>	10	R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
3 LTREQ.ADDRESS1 <input type="text"/>	60	L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
4 LTREQ.ADDRESS2 <input type="text"/>	60	L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
5 LTREQ.ADDRESS3 <input type="text"/>	60	L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

# Creating the Letter

**DOC - Document Codes**

Document Name : FAMRR

Description:

Document Type:

Office Code:

Author:

Receipt Numbers:

History Type:

Send Multiple:

Print Day:

Grouping Name:

Print Actions:

History Actions:

Name/Addr Hierarchy:

Mail Type:

Merge File:

Document Paragraphs:

Document File Setup:

Hardcopy Document Options:

E-Mail Document Options:

FA Year:

# HDCD - Hardcopy Document Options

DOC - Document Codes    **HDCD - Hardcopy Document Options**

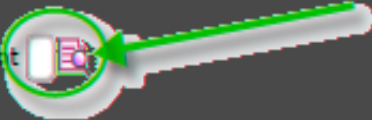
Document Name : FAMRR Multitply Reporting Letter

Document Type : WINTEG.WORD MS Word for Windows Merge

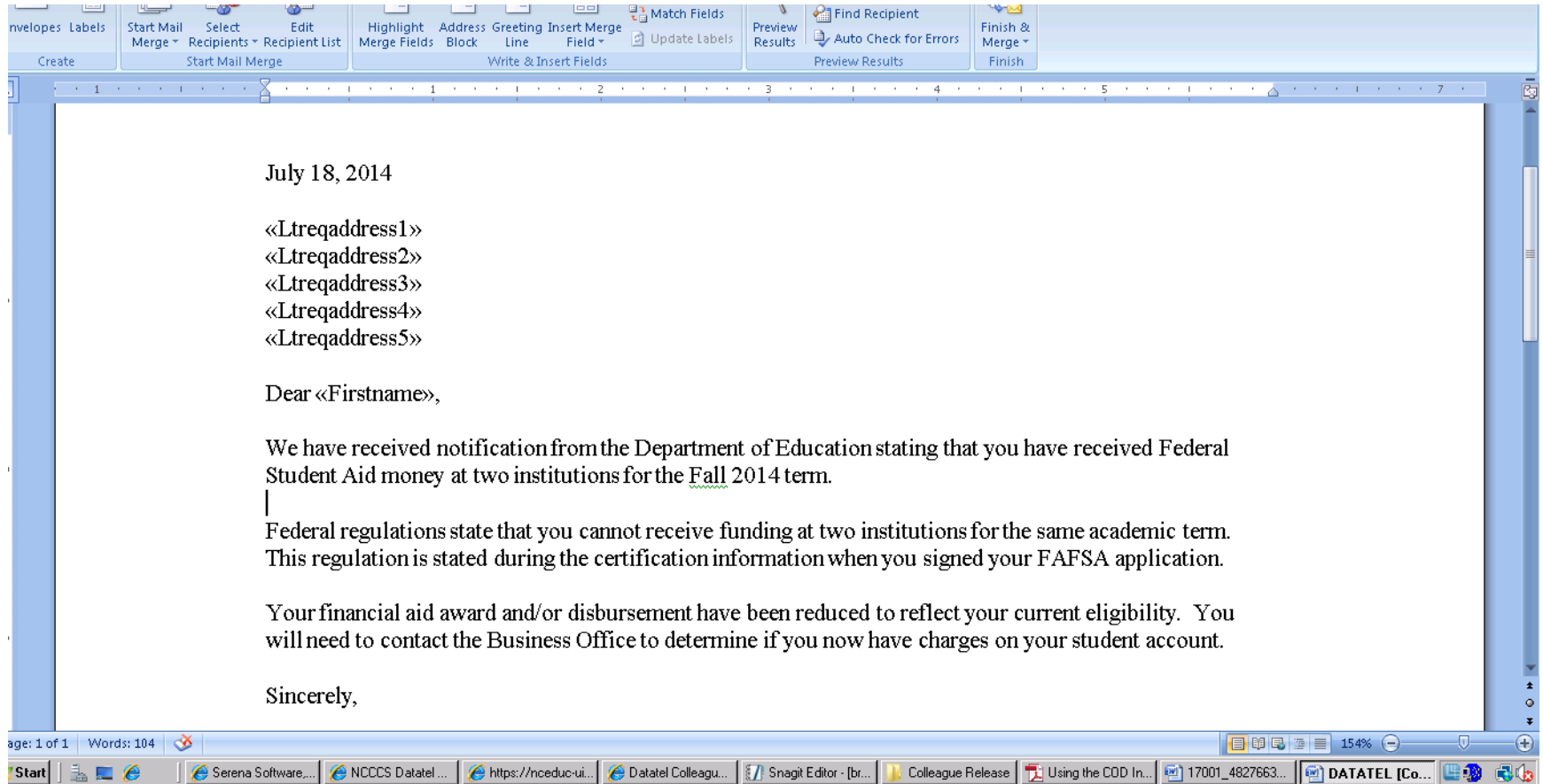
Printer

Document File

Word Processor Document Format



# Mail Merge – Word



# DOC - Email

**DOC - Document Codes**

Document Name : FAEMRR

Description: Multiple Reporting Email

Document Type: EMAIL E-Mail Built From Doc Paras

Office Code: FA Financial Aid

Author: 0076341 S0076341 - B. Massey

Receipt Numbers: No

History Type: C Code

Send Multiple: Yes

Print Day: D Daily

Grouping Name:

Print Actions: 1

History Actions: 1

Name/Addr Hierarchy: PREFERRED Preferred Name & Address

Mail Type:

Merge File: LTREQ

Document Paragraphs:

Document File Setup:

Hardcopy Document Options:

E-Mail Document Options:

FA Year:

# DFS – Document File Setup

DOC - Document Codes | **DFS - Document File Setup**

Document Name : FAEMRR Multiple Reporting Email  
 Document Type : EMAIL      E-Mail Built From Doc Pa

Merge File       Scan Document   
 Document File       Scan Start Char    
 Output File       Scan End Char    
 Subroutine Name

Binary Fields Name / Pointer	Length	Just	Fill	Tr	Max	Dictio Field
T.NAME	30	L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	1 FIRS
.TREQ.PERSON	<input type="text" value="10"/>	R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	2 ID
.TREQ.PERSON	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	3
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	4
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	5



# DOC – Document Paragraphs

**DOC - Document Codes**

Document Name : FAEMRR

Description: Multiple Reporting Email

Document Type: EMAIL E-Mail Built From Doc Paras

Office Code: FA Financial Aid

Author: 0076341 S0076341 - B. Massey

Receipt Numbers: No

History Type: C Code

Send Multiple: Yes

Print Day: D Daily

Grouping Name:


Print Actions: 1


History Actions: 1


Name/Addr Hierarchy: PREFERRED Preferred Name & Address


Mail Type:

Merge File: LTREQ


Document Paragraphs: 

Document File Setup:  

Hardcopy Document Options:  

E-Mail Document Options:  

FA Year:



# DOCP – Document Paragraphs

DOC - Document Codes | **DOCP - Document Paragraphs**

Document Name : FAEMRR Multiple Reporting Email  
 Document Type : EMAIL      E-Mail Built From Doc Pa

Recalculate Paragraphs

Custom Paragraphs	Position	Rules
1 FAMRR Multiple Reporting Paragraph	1	<input type="text"/>
2 <input type="text"/>	<input type="text"/>	<input type="text"/>
3 <input type="text"/>	<input type="text"/>	<input type="text"/>
4 <input type="text"/>	<input type="text"/>	<input type="text"/>
5 <input type="text"/>	<input type="text"/>	<input type="text"/>
6 <input type="text"/>	<input type="text"/>	<input type="text"/>
7 <input type="text"/>	<input type="text"/>	<input type="text"/>
8 <input type="text"/>	<input type="text"/>	<input type="text"/>
9 <input type="text"/>	<input type="text"/>	<input type="text"/>
10 <input type="text"/>	<input type="text"/>	<input type="text"/>
11 <input type="text"/>	<input type="text"/>	<input type="text"/>
12 <input type="text"/>	<input type="text"/>	<input type="text"/>

# DPAR – Define Custom Paragraphs

DOC - Document Codes | DOCP - Document Paragraphs | **DPAR - Define Custom Paragraphs**

Code:

Description:

Office:












Merge File:

Reformatting Option:

Financial Aid Year:

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Paragraph Text Page 1 of 2

1	Dear «Firstname», Student ID: @iD	
2	<input type="text"/>	
3	We have received notification from the Department of Education	
4	stating that you have received Federal Student Aid money at two	
5	institutions for the Fall 2014 term.	
6	<input type="text"/>	
7	Federal regulations state that you cannot receive funding at two	
8	institutions for the same academic term. This regulation is stated	
9	during the certification information when you signed your FAFSA	
10	application.	
11	<input type="text"/>	

# Creating Email Text

Comment Screen ? x

Dear FIRST.NAME , Student ID: @ID

We have received notification from the Department of Education stating that you have received Federal Student Aid money at two institutions for the Fall 2014 term.

Federal regulations state that you cannot receive funding at two institutions for the same academic term. This regulation is stated during the certification information when you signed your FAFSA application.

Your financial aid award and/or disbursement have been reduced to reflect your current eligibility. You will need to contact the Business Office to determine if you now have charges on your student account.

Sincerely,

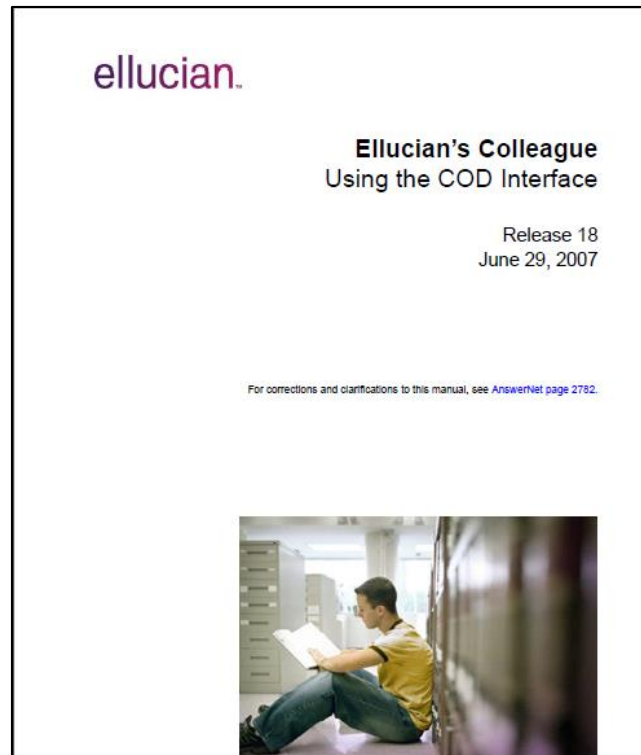
The Financial Aid Office

# Summary

- ❖ **MRRs and POP records should be reviewed in a timely manner...especially during disbursement times.**
- ❖ **Utilize all Colleague screens discussed to track and resolve MRRs.**

# Resources

## ❖ Ellucian's Colleague: Using the COD Interface – June 29, 2007



# Questions/Answers

