



*400 Quadrangle Drive Bolingbrook, Illinois 60440*

# Introduction

TEAM was developed by GEMCOR, Inc. in response to the overwhelming need for a user friendly, Windows based, software system for use by post secondary institutions to transmit electronic applicant and award information directly to GEMCOR from the school's on campus computer systems. TEAM (Title IV Electronic Awarding Module) is an optional software system that allows schools the ease of electronically transmitting award requests to GEMCOR.

Electronic processing is undoubtedly the fastest and most accurate way for our offices to communicate. It allows you to receive ISIRS the same day we get them from the department, reduces the turnaround time on your awards, allows you to originate your payment requests electronically all while using today's state of the art technology.

Either way, additional benefits include reduced paper waste and postage expense for both of our offices as well the obvious time benefit of being able to initiate payment requests the same day that an ISIR is produced by the department! In most cases you'll be able to process actual payments within 2-3 days of filing the FAFSA. TEAM is an optional system. Physical review of ISIR files is still available for those schools who like the "second set of eyes" confirming the accuracy of the ISIR file.

Our TEAM system allows users to preview or print ISIRS to the screen or printer, print award letters at your location, view disbursement journals via TEAM, preview a short copy of the ISIR called the "QUICK VIEW ISIR," view a transmission log for payment requests and confirmations, view disbursement information, pull information from your existing TRAX System into TEAM, change your school name and address, view new student award information, screen for all payment types, preview EFC intermediate values available for direct loan processing, has the ability to scroll through all payment records for subsequent payment requests, and offers multi-user functionality on your existing network.

Your TEAM system also includes electronic withdrawal and refund notifications, electronic subsequent payment requests, and most importantly, report capability ensuring that no students "slip through the cracks" and end up unprocessed. GEMCOR's new TEAM now joins the best technical support team in the country, combining to give you effortless administration of your Title IV funds.

In past years TEAM was only used by clients who requested this service, and an annual software fee was charged. We are very happy to announce that our TEAM system is now free of charge to all of our clients. We feel that the savings generated by the system will cover any development costs and are passing that savings on to you. We are also confident that you will benefit from reduced postage and express mail expenses on your end too. Lastly, regulations allow you to maintain your records electronically so you need not even print your ISIRS on campus. Once they are in your TEAM system, they are part of your permanent records. As with any software system, **we encourage routine backups of your data**, but should you lose any data, we can regenerate a year-to-date batch of ISIRS at any time. It's a classic win-win situation.

GEMCOR, Inc. is now paperless with ISIRs and Award Letters. If you are not already a TEAM Client, please call our offices at 1-888-GEMCOR-8 to receive your TEAM Installation Package for 2013-2014 so that you can print your 2013-2014 ISIRS and 2013-2014 Award Letters.

This user's manual will outline the features of the TEAM software system and will provide instructions for the use of all TEAM features. If at any time you require technical support, help is only a phone call away. Just dial toll free 1-888-GEMCOR-8.

## 2013-2014 TEAM System Features

- ④ Receive ISIRs electronically through Internet based transfers
- ④ Print/Preview ISIR records by daily batch or individual basis
- ④ Request Federal Pell Grant Awards
- ④ Request Federal SEOG Awards
- ④ Request Federal Direct Loan Awards
- ④ Print Award Letter Notifications
- ④ Notify GEMCOR of refunds deposited
- ④ Computer based recordkeeping of all your file submissions and disbursements
- ④ View Disbursement Journal Information
- ④ Full-Time Technical Support via Your Computer Screen

Annual Licensing Fee: **FREE** to all GEMCOR Clients

## System Requirements

- ④ IBM Compatible Personal Computer (PC)
- ④ Windows XP, Windows Vista and Windows 7 or Windows 8 Operating Systems
- ④ A CD, CDR, or DVD Drive
- ④ DSL Connection
- ④ Microsoft Access 2010 or installation of the Microsoft Access Runtime 2010 files

In order to access the 13-14 TEAM program, you will either need to have Microsoft Access 2010 installed on your computer, OR you will need to install the Microsoft Access Runtime 2010 files. If you do not already have Microsoft Access 2010 installed on your machine and you need to install the Microsoft Access Runtime 2010 files, please call Terrah at 1-888-GEMCOR-8 or email [terrah@gemcorinc.com](mailto:terrah@gemcorinc.com) for instructions on how to do so.

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## ***Procedural Information***

### ***Application Processing***

To receive federal student financial assistance your students will be required to file a universal and nationally recognized application known as a Free Application for Federal Student Aid (FAFSA). FAFSAs are typically filed by the student at the U.S. Department of Education's FAFSA processing web site [www.fafsa.ed.gov](http://www.fafsa.ed.gov). Within 48-72 hours the student's FAFSA is processed by the Central Processing System (CPS) and an Institutional Student Information Record (ISIR) is released to each of the institutions to which the student authorized the release of his/her information during the application process. These ISIRs are necessary to begin the federal aid awarding process.

### ***ISIR Processing***

Any ISIR files for your school are downloaded into your computer each time you perform the "receive" function from the Command Center Menu. Any ISIR data that GEMCOR has prepared for you will be returned during this transmission. If you received any ISIR files from GEMCOR, they must be imported into the TEAM database, and then you will have the option to preview or print selected students' ISIRs. Schools who receive data from the Student Aid Internet Gateway (SAIG) system under their own "TG" account can choose whether they want to import and print their ISIRs through EDEpress, or through TEAM.

### ***Pell Award Processing***

After your ISIRs have been imported into the TEAM system, you can enter "Formula Sheet" information for students who are ready for a first Pell payment for the award year. For subsequent payments, simply enter the payment eligibility date into the student's record in the TEAM system. All Pell award files can then be exported, and the files will be transmitted to GEMCOR during your next "send" function. When we receive the file, your students' Pell awards will be processed accordingly.

### ***Federal Direct Loan Processing***

After your ISIRs have been imported into the TEAM system, you can enter "Certification Worksheet" information for students who are ready for a first Direct Loan payment for the award year. For subsequent payments, simply enter the payment eligibility date into the student's record in the TEAM system. All Direct Loan award files can then be exported and transmitted to GEMCOR during your next "send" function. When we receive the file, your students' Direct Loan awards will be processed accordingly.

### ***Campus-Based Award Processing***

In similar fashion to the procedures for electronic Pell award requests, campus-based award requests can also be data entered into the student's record in the TEAM system. The campus-based award requests will be transmitted to GEMCOR during your next "send" function. Upon receipt of your electronic file, the students' campus-based awards will be processed accordingly.

### ***Refund / Withdrawal Processing***

Refund information and withdrawal date information can be entered into the student's record in the TEAM system. As with Pell and campus-based award requests, any pending refund or withdrawal information is automatically exported from the TEAM system. Upon receipt of your electronic data file, any refund or withdrawal information is processed accordingly.

The above descriptions represent a simple overview of the TEAM administrative processes. Please review the respective sections in this manual for detailed information on entering data and navigating through the TEAM Software System.

## Overview of TEAM Buttons

Upon entering the TEAM system, a main menu will be displayed showing the eight administrative functions available to you as well as an "EXIT" command button.



If at any point when you are in the TEAM program, and you want to get back to the Command Center screen, simply click the "EXIT" button at the bottom left of the screen. Try not to "X" out of any TEAM screens using the red "X" on the upper right section of the screen.



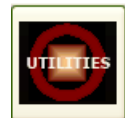
The "PRINT ISIR SUMMARY" button is used if you want to print a listing of all current ISIRs in TEAM.



The "PROCESS" button allows you to go into each student's record and request PELL grants, Loans, and FSEOG (if school is eligible). This function also allows you to report refunds as well.



From the "TRANSMIT" menu, users will be able to preview a list of all students toggled, preview/print a copy for a student's file, export and send to GEMCOR, and view your Transmission Log.



The "UTILITIES" button allows you to set up Program Information, Budget Information, School Information, view GEMCOR Disbursement Reports and Transmission Log.



The "PREVIEW ISIR" button allows you to preview the selected student's ISIR to the screen rather than printing it to the printer. First, select a student from the list and click the "PREVIEW" button at the bottom of the screen.



The "QUICK VIEW" button allows you to view a single-page "Quick View" of a student's ISIR. If you would like to see a student's ISIR Quick View, select a student from the list and click on the "Quick View" button at the bottom of the screen.



The "PRINT ISIR" button is used if you would like to print a student's ISIR. First, select a student from the list and click on the "PRINT" button at the bottom of the screen.



The "PACKAGE REPORT" button generates a report sorted in descending date order that lists all of the students that were packaged through TEAM.

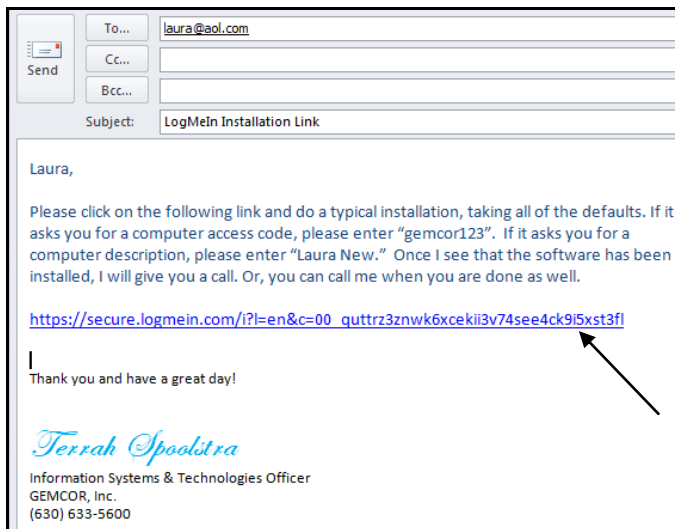


Click the "Bulk Payment Request" button to quickly toggle anticipated disbursements whose projected payment dates are prior to today.

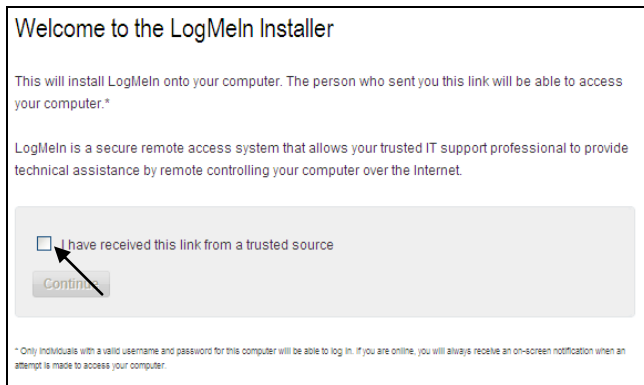
# Installation

## 📧 GEMCOR now installs TEAM and TRAX remotely through LogMeIn software!

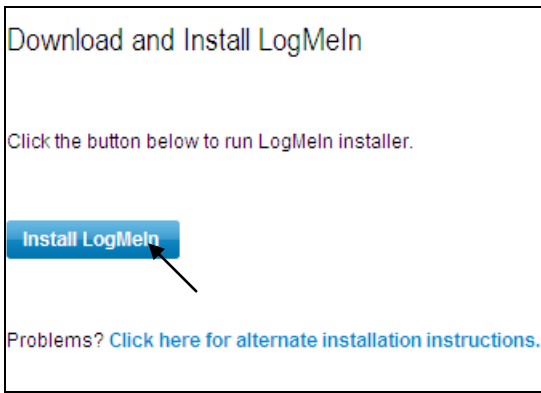
This is the fastest and most convenient way to install our software on your computer, and it only takes a few easy steps! First, we need to install LogMeIn on the computer in which you want to run TEAM or TRAX. Please call our Technical Support Staff when you are ready to install the LogMeIn software on your machine. We will then send you an installation link via email that looks like the one below:



When you click the link in the email, the following message will appear. You should check the box next to, "I have received this link from a trusted source," and then click "Continue."



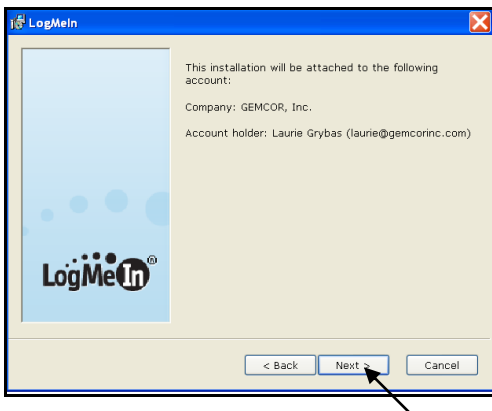
Next, the following screen will appear, and you should click "Install LogMeIn."



The following screen will appear, and you should click "Next."

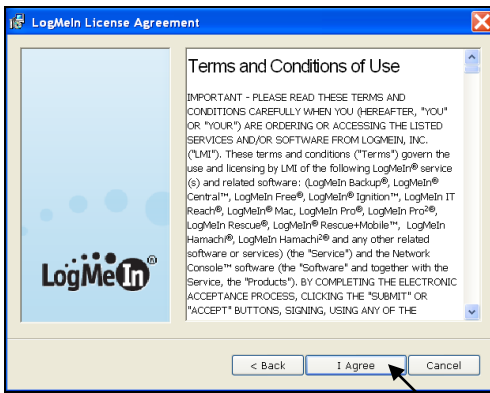


The following screen will appear, and you should click "Next."

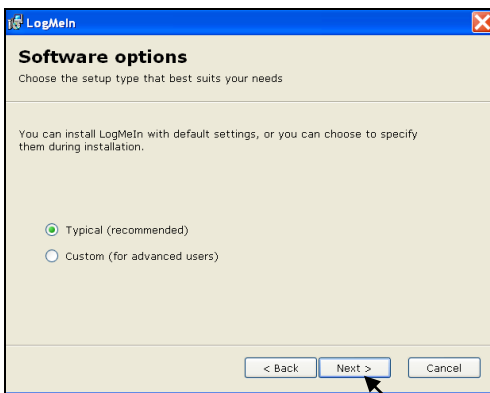


The following screen will appear, and you should click "I Agree."

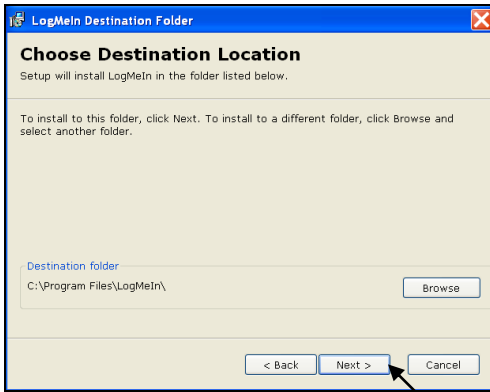




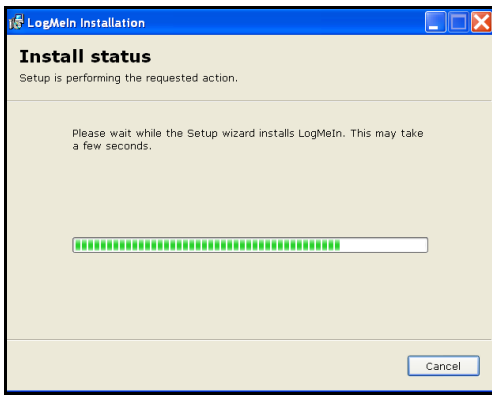
The following screen will appear, and you should choose “Typical (recommended)” and click “Next.”



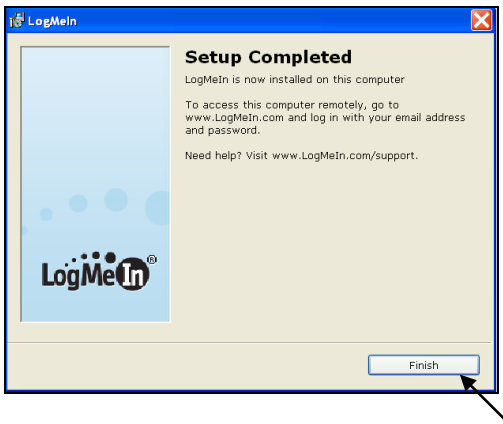
The following screen will appear, and you should click “Next.”



The following screen will appear, and you should wait until the green bar finishes loading and wait until the second box appears:



When this box appears your setup is completed, and you can click "Finish."



Once you have completed the installation of LogMeIn on the computer that you wish to have TEAM installed, our Technical Support Staff can log into your machine remotely and install the TEAM software. After the installation is complete, we will load your Year to Date ISIR files, updated Disbursement Journals, and Confirmation Files into your TEAM mailbox and activate your license.

## You can also choose to install the TEAM software through a CD mailer package

### Workstation Installation from CD:

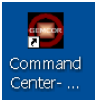
Close any programs which may be minimized or running on your system. Place the **TEAM** CD into your CD-ROM, CD-RW, or DVD-ROM drive. Click the **Start** button, then **Run**, then click **Browse**. Select your CD/DVD drive from the pick list marked "Look In". To install, select and run the "Setup.exe" file to begin your installation.

- #1) Welcome Screen, **click "NEXT"**
- #2) Customer Information Screen, **Enter User Name and Organization** and **click "NEXT"**
- #3) Choose Setup Type, **Select "CUSTOM"**
- #4) Custom Setup, **Select "BROWSE"**
- #5) Change Destination Folder, **Change Folder Name to "C:\TEAM"** and click **"OK"**
- #6) Custom Setup Screen, **Click "NEXT"**
- #7) Ready to Install Screen, **Click "INSTALL"**

### After Installation:

Once your installation is complete, please call our Technical Support Staff at 1-888-GEMCOR-8 and we will load your Year to Date ISIR files, updated Disbursement Journals, and Confirmation Files into your TEAM mailbox and activate your license. We have an optional Support Package available that will allow our Technical Support Staff to connect to your computer screen to assist with your installation (if needed), on-line training and troubleshooting. Please ask our Technical Support Staff about this very valuable support package.

## Getting Started



Now that you have installed and reviewed the layout and basic features of your new TEAM system, you are ready to start using the software. In order to open the TEAM system, you must first launch the Command Center. On your desktop there is an icon titled "Command Center - GEMCOR, Inc." Double click this icon to open the Command Center.

*Serving Federal Student Aid Programs Since 1973*

# GEMCOR

Version: 012

## Software Applications Command Center - GEMCOR, Inc.

### TEAM

Title IV Electronic Awards Management

NO NEW MESSAGES

Any messages in green above need to be read into the appropriate TEAM program before continuing additional "RECEIVES". Select the TEAM Program for the corresponding award year to have these notifications read into TEAM now. If you have any questions, please call GEMCOR Technical Support at: 1-888-GEMCOR-8.

### TRAX

Student Records Management Software

Enter TRAX    TRAX Upgrade

**GEMCOR, Inc.** for Technical Support, Call Toll Free: 1-888-GEMCOR-8  
*Institutional Servicing & Software* Home Directory: c:\team  
 Visit us on the web at [www.gemcorinc.com](http://www.gemcorinc.com)

The left side of the Command Center contains all **TEAM** Software functions. The right side of the Command Center contains all **TRAX** Software functions. TRAX, Institutional Student Tracking System, is another software package that we offer our clients. TRAX provides modules to efficiently monitor and track prospects; Admissions and Enrollment; Document Tracking; Marketing and Admissions Rep Performance; Attendance, Grades and Services Tracking; Satisfactory Academic Progress (SAP) Reports; Accounts Receivable; Placement Tracking; Default Management; 90-10 Revenue Tracking & 1098T Reporting; and Unearned Tuition Calculations. **If you would like to receive more information on our TRAX Software package, or if you would like to receive a TRAX Demo, please call our office at 1-888-GEMCOR-8.**

Please notice the new addition of a version number to the top of the Command Center (see arrow above). The version of the Command Center pictured above is Version 012. This is different than the version number of your TEAM system. If the "2013-2014" button on your Command Center is not enabled, please call our offices at 1-888-GEMCOR-8 for assistance.

- 2010-2011
- 2011-2012
- 2012-2013
- 2013-2014

To enter into the TEAM System from your Command Center, simply click on the award year in which you wish to enter. The first time that you click on the “2013-2014” button from the Command Center, a message box will appear. This message box tells you that the TEAM program is loading your school information from TEAM 2012-2013 and will now close. Click ok, and it will bring you right back to the Command Center where you can re-enter TEAM by clicking on the “2013-2014” button again. If you did not have TEAM 2012-2013, you will have alternate steps to load your school information into the TEAM system. Please see the following section titled, “Utilities,” for more information.

The image below displays the 2013-2014 TEAM Main Menu. The background of the 13-14 TEAM Main Menu displays the 2013-2014 new award year color, which is green. In the upper left corner of this TEAM main menu, you will see the current version number of the TEAM system that you are running (see arrow below). Below this, in the center of the screen, you will see the Name, School Code, and Address of your Institution. In the lower right corner of this screen, there is an option of how to sort the Student ISIR List. You can choose to sort the list of student ISIRS by Name, Student ID, or Date Added by simply selecting the circle to the left of each option (see arrow below).



**If you have not done so already, please complete the following before you attempt to initiate 2013-2014 Payment Requests to GEMCOR via TEAM.**

# Utilities

## Loading the School Information, Program Information, and Budget Information



Go to the “Utilities” Module and click on the “Miscellaneous” tab. Click on “School Global Import from TEAM 2012-2013” to automatically load the Program Information and Budget Information from TEAM 2012-2013 into TEAM 2013-2014.

**Disbursement Report by Payment Date:** To print a report of all of the disbursements in your TEAM 2013-2014 database, click the “Disbursement Report by Payment Date” button. This report should match your daily disbursement journals from GEMCOR. You should periodically match the disbursement journals to this report. Data may not reflect refunds processed outside of this system.

**NEW:** **Anticipated Disbursements within Date Range:** This function will print a report of all of the 13-14 anticipated disbursement records whose projected payments are within a particular date range, that have not yet been toggled for payment. Enter the date range in which you wish to run the report and click the “Anticipated Disbursements within Date Range” button.



If you would like to hand key the information from scratch or you do not have any previous information to load, click on the “Program Information” tab, the “Budget Information” tab, and the “School Information” tab and add the information manually. See below.

## Program Information

The Program Information Module includes constant information about Academic Programs at each of your schools. Go to the “Utilities” section and click on the “Program Information” tab. Complete the following information to create a program record for each academic program at your school. The asterisk “\*” key at the bottom of the screen, allows you to add a new record (see arrow below).

Enter your first program ID and description. Enter the program length by typing in the clock/credit hours (or terms) and the number of weeks in the selected program. Then, enter the academic year length by typing in the clock/credit hours (or terms) and the number of weeks in the academic year. Enter the number of payments in each program, the breakdown in units or terms for each pay period and the number of weeks in each pay period. This will aid in calculating the Anticipated Disbursements on your TEAM Award Letters.

**NEW:** Click the “Delete This Program” button if you would like to delete the program that is currently displayed on the screen. This function is password protected and should only be used if you have created a program in error or if there is a blank program that needs to be deleted. It is advised that you do not delete programs that you have previously used to package student awards. Please call GEMCOR at 1-888-GEMCOR-8 for the password to Delete a Program.

**Utilities Menu**

Program Information | Budget Information | School Information | Miscellaneous

**Program ID:**  (6 character maximum)

**Description:**

**# Payments in the Program**

	#Units in Pay Period	#Weeks in Pay Period		#Units in Pay Period	#Weeks in Pay Period	
<b>Program Length</b>			#1	<input type="text" value="1"/>	<input type="text" value="15"/>	
<b>Number of Units</b>	<input type="text" value="3"/>	<input type="text" value="45"/>	#2	<input type="text" value="1"/>	<input type="text" value="15"/>	
<b>Number of Weeks</b>			#3	<input type="text" value="1"/>	<input type="text" value="15"/>	
<b>Academic Year Length</b>						
<b>Number of Units</b>	<input type="text" value="3"/>	<input type="text" value="45"/>				
<b>Number of Weeks</b>						

Complete the fields above to create a Program Record for each academic program at your school. Use the Navigation Toolbar below to Navigate through the program records. The asterisk "\*" key below adds a new record. Use the binoculars on the left to search for a specific program.

**Delete This  
Program**

This function is password protected and should only be used if you have created a program in error or if there is a blank program that needs to be deleted. It is advised that you do not delete programs that you have previously used to package student awards. Please call GEMCOR at 1-888-GEMCOR-8 for the password to Delete a Program.

Record: ◀ 1 of 8 ▶ ⌂ No Filter

## Budget Information

Enter your Budget Information by selecting the “UTILITIES” button and selecting the “Budget Information” tab. Complete each field on this page to create a Cost of Attendance record for each Standard Budget used at your school. Use the navigation toolbar at the bottom of the screen to navigate through the budget records. The asterisk “\*” key below adds a new record. Use the binoculars at the bottom of the screen to search for a specific Budget.

First enter your Budget ID and Budget Description. Then enter the amounts for each field A-E for your Budget. Do not leave any fields blank. The total cost of attendance for the specific, standard Budget will be calculated.

**NEW:** Click the “Delete This Budget” button if you would like to delete the budget that is currently displayed on the screen. This function is password protected and should only be used if you have created a budget in error or if there is a blank budget that needs to be deleted. It is advised that you do not delete budgets that you have previously used to package student awards. Please call GEMCOR at 1-888-GEMCOR-8 for the password to Delete a Budget.

**Utilities Menu**

Program Information Budget Information School Information Miscellaneous

<b>Budget ID</b>	<input type="text" value="MA-D"/>	(6 character maximum)
<b>Budget Description</b>	<input type="text" value="Medical Assistant Dependent"/>	
<b>A. Tuition and fees for full academic year</b>	<input type="text" value="\$13,600.00"/>	
<b>B. Books, supplies, equipment</b>	<input type="text" value="\$550.00"/>	
<b>C. Room and Board (Determined by school)</b>	<input type="text" value="\$1,500.00"/>	
<b>D. Miscellaneous expenses, transportation (Determined by school)</b>	<input type="text" value="\$1,000.00"/>	
<b>E. Other, e.g., dependent care or disability expenses (Determined by</b>	<input type="text" value="\$0.00"/>	
<b>Total Cost of Attendance</b>		<b>\$16,650.00</b>

Complete the fields above to create a Cost of Attendance record for each standard budget used at your school. Use the Navigation Toolbar below to Navigate through the program records. The asterisk "\*" key below adds a new record. Use the binoculars on the left to search for a specific program. Do not leave values blank.

This function is password protected and should only be used if you have created a budget in error or if there is a blank budget that needs to be deleted. It is advised that you do not delete budgets that you have previously used to package student awards. Please call GEMCOR at 1-888-GEMCOR-8 for the password to Delete a Budget.

Record: 1 of 21 No Filter Search



## School Information

Enter your school information by selecting the “UTILITIES” button and selecting the “School Information” tab. Enter your school’s name, address, phone number, and OPE ID. To the right, there is the “Export Data” button. Use this function to export demographic ISIR data on each 13-14 ISIR in your system. This can be used for mailing labels or to email distributions lists. This data is sent to C:\TEAM\TEAMDATA.txt.

**Utilities Menu**

Program Information Budget Information **School Information** Miscellaneous

School Name: ABC Institute of Business

Street Address: 1000 Main Street

City: Demoville

State: IL

Zip: 60515-

Phone Number: (630) 555-1313

Vendor: 041847

OPE ID: 04184700

Use the Export Data function to export demographic ISIR data on each 12-13 ISIR in your system. This can be used for mailing labels or email distributions lists. The data is sent to C:\TEAM\TEAMDATA.TXT

Export Data

Record: 1 of 1 No Filter Search

## Sorting the Student Records

You can sort the student information on your TEAM Main Menu one of three ways. In the lower corner of the TEAM Main Menu, you will see the image to the right.

**Sort ISIR List By:**

- Student Name
- Student ID
- Date Added

You can sort the information by the Student’s Name, the Student’s ID, or the Date Added. This feature makes it much easier for you to find the student record that you wish to view or process. The default selection will be to sort the student records by Student Name. You can change this option by simply clicking in the circle next to the choice that you wish to sort the student records, and the ISIR List on the TEAM Main Menu will change accordingly.

# Process



When processing PELL, Direct Loan, or FSEOG for a student, select the student from the TEAM Main Menu and click on the "PROCESS" button.

The buttons to the right are found at the bottom of the "Process" screen. These buttons allow you to EXIT this menu and go back to the previous screen, view a QUICK VIEW ISIR, PREVIEW ISIR, VIEW ALL RECORDS, view a STUDENT DATA SHEET, and also view the student's AWARD LETTER.



## PELL



To process a PELL payment, first select a student from the TEAM Main Menu and click on the "PROCESS" button at the bottom of the screen. The following menu will appear. If the student is a transfer student, click the check box next to "Transfer Student." Enter the student's original start date. If the student's record is already in TRAX, you may choose to import the original start date from the TRAX system by clicking on the "TRAX" button next to the "Original Start Date" field. Enter the scheduled attendance per week and select the Program ID before continuing on.

**NEW:** Admissions Criteria / ATB field now required for all Pell and Loan. It is located on the General Information Screen in 13-14 TEAM for each student (see arrow below). Be sure this value is correct before packaging the student record. The default value is pulled off of the student's ISIR. You should modify this default value for each student where applicable.

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

(1) Original Start Date:

(2) Scheduled Attendance Per Week:

(3) Program ID:  Student ID: 11122333DE01 Original SSN: 111223333  
 School ID: 041847  
 EFC: 00000\*

01	Testing Complete
02	College Credits
04	Home Schooled
06	High School Diploma
07	GED

↖

---

<b>Number of Units in Program</b>	<b>Number of Weeks in Program</b>
72	39
<b>Number of Units in Academic Year</b>	<b>Number of Weeks in Academic Year</b>
30	30
<b>#Payments in the Program</b>	
3	

Added To Team for Packaging on:  Package Date:

Next, click on the “Packaging” tab, and this will bring you to the “Pell” sub-tab.

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | **Packaging** | Disb/Refunds | Comments | Transmission Log

PELL | DIRECT LOAN - Grade Level One | DIRECT LOAN - Grade Level Two | FSEOG | Anticipated Disbursements | Parent Borrower Info | Option

**Select a Cost of Attendance Budget:**  (1)

A. Tuition and fees for full academic year:

B. Books, supplies, equipment:

C. Room and Board (Determined by school):

D. Miscellaneous expenses, transportation (Determined by school):

E. Other, e.g., dependent care or disability expenses (Determined by school):

**Total Cost of Attendance** **\$20,210.00**

Pell Expected Disbursement: **\$5,645.00**

Pell Scheduled Award: **\$5,645.00**

#Units students will complete at your school:  (4)

If Start Date Prior to 7/1/2013, Enter the Units Completed as of 6/30/2013:  (5)

Start This Award with Payment Period Number:  (Range: 1 to 3) (2) Date this Payment Period Began:  (3)

**Calculate Anticipated Pell Disbursements**

Added To Team for Packaging on:  Package Date:

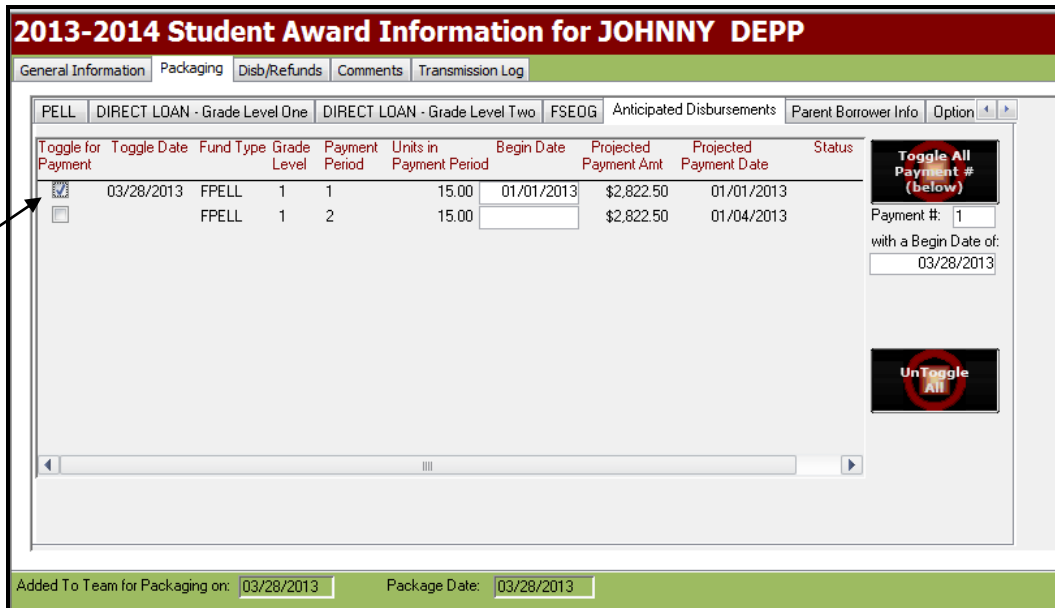
Please note: the following steps are numbered in the order in which you should complete them on the screen above and the corresponding numbers are included in the steps below.

The cost of attendance values may change for each student within a program, but should generally be based on standard budgets determined the school. Select the Cost of Attendance budget from the drop down menu at the top of this tab (1). In step A, enter the tuition and fees for a full academic year. In step B, enter the amount for books, supplies, and equipment. In step C, enter the amount for room and board (determined by school). In step D, enter the amount of miscellaneous expenses and transportation (determined by school). In step E, enter other costs (e.g., dependent care or disability expenses). The total cost of attendance will be calculated for each student in the specific program that you identified above.

On the bottom of this tab, enter the payment period number you would like to start the award, either 1, 2, 3 or 4 (2). To the right, enter the date this payment period began (3). On the right side of this tab, enter the number of units the student will complete this academic year at your school (4). In the following box, if the start date is prior to 7/1/2013, enter the units completed as of 6/30/2013 (5). Once you have entered all of the student's information in the PELL tab click on the “Calculate Anticipated Pell Disbursements” button at the bottom. This will take the information that you have entered for the student, and calculate the anticipated Pell disbursements. This calculation will display on the “Anticipated Disbursements” tab.

Once you click “Calculate Anticipated Pell Disbursements,” you can modify any information as necessary. If you have to make any changes to the data that you have entered, please do so, and then click on the “Calculate Anticipated Pell Disbursements” button again. A box will pop up saying, “Any existing Pell Anticipated Disbursements will be Deleted and Re-calculated Are you sure you want to continue?” If you want to delete the previously-entered information and replace it with the new data, click “Yes.” The new data will be reflected in the “Anticipated Disbursements” tab.

To toggle this student's Pell payment, go to the "Anticipated Disbursements" tab, which is to the right of the "FSEOG" tab. You should now see an entry for the Pell payment that you just calculated in the previous step.



Toggle for Payment	Toggle Date	Fund Type	Grade Level	Payment Period	Units in Payment Period	Begin Date	Projected Payment Amt	Projected Payment Date	Status
<input checked="" type="checkbox"/>	03/28/2013	FPELL	1	1	15.00	01/01/2013	\$2,822.50	01/01/2013	
<input type="checkbox"/>	03/28/2013	FPELL	1	2	15.00	01/04/2013	\$2,822.50	01/04/2013	

If you are ready to toggle this payment request, check the "Toggle for Payment" box for the appropriate calculation (see arrow above). This should automatically enter the Toggle Date to the right of the check box. If you want to toggle all of the payment requests in the list with a certain payment number and begin date: enter the "Payment #:" in the box in the top-right, enter the date into the "with a Begin Date of:" field, and hit the "Toggle All Payment # (below)" button. To un-toggle all payments in the list, click the "Un-Toggle All" button on the lower-right. The data for this student's Pell Payment Request is now toggled and will be exported and sent to GEMCOR, Inc. during the next "SEND" transmission.

## Direct Loan



A first payment of a Stafford or PLUS loan is accomplished by submitting a file to our office for loan origination. This file can now be submitted electronically via our TEAM system.

The following questions you might already be familiar with if you have submitted FDSL Certification Worksheets to us in the past. You can now submit the same information to us electronically via TEAM. Select the grade level of the loan by selecting either the "DIRECT LOAN – Grade Level One" or "DIRECT LOAN – Grade Level Two" tabs (question 2 on certification worksheet). Generally, the grade level represents the student's grade level at your institution. If you offer a one-year diploma or certificate program in a particular occupation, the student's grade level will be a "1." If a student has attended two years of college at another school prior to enrolling at your school, that does NOT put the student into grade level "3." The grade level represents the student's grade level for training received at your institution only.

To process a Direct Loan payment, first select the student from the TEAM Main Menu and press the "PROCESS" button at the bottom of the screen. If this payment request is for a grade level one loan, click on the "Packaging" tab to the right of the "General Information" tab, and then click on the "DIRECT LOAN – Grade Level One" tab to the right of the "PELL" tab. This will bring you to the menu below.

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

PELL | DIRECT LOAN - Grade Level One | DIRECT LOAN - Grade Level Two | FSEOG | Anticipated Disbursements | Parent Borrower Info | Option

**First Time Borrower** (1)       Independent    Dependent    Parent Plus Denied Credit Check (4)

**Start Award with Payment Number:** 1

**Clock/Credit Hours in the Loan Period:** 30 (2)

**Loan Period Begin Date:** 01/01/2013 (5)

**Loan Period End Date:** 01/08/2013 (6)

**Anticipated Graduation Date:** 01/17/2013 (7)

**Select a Cost of Attendance Budget:** Awp10 (3)

Subsidized Loan Determination		Unsubsidized/Plus Loan Determination	
Loan Period Cost of Attendance	\$16,520	Loan Period Cost of Attendance	\$16,520
Less EFC	\$0	Less SUB Loan Amount Requested	\$3,500
Less Loan Period Other Financial Aid	\$0	Less Loan Period Other Financial Aid	\$0
Less Pell Scheduled Award	\$5,645	Less Pell Scheduled Award	\$5,645
<b>Unmet Financial Need</b>	<b>\$10,875</b>	<b>Unmet Financial Need</b>	<b>\$7,375</b>

Loan Amt Requested:    **SUB\$** \$3,500      **UNSUB\$** \$6,000      **PLUS\$** \$0

**Calculate Max Loan Amount**    **SUB** (8)      **UNSUB** (9)      **PLUS** (10)

**Calculate Anticipated Grade Level 1 Disb**

Added To Team for Packaging on: 03/28/2013      Package Date: 03/28/2013

If this payment request is for a grade level two, click on the "DIRECT LOAN – Grade Level Two" tab to the right of the "DIRECT LOAN – Grade Level One" tab. This will bring you to the menu below

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

PELL | DIRECT LOAN - Grade Level One | DIRECT LOAN - Grade Level Two | FSEOG | Anticipated Disbursements | Parent Borrower Info | Option

**First Time Borrower** (1)       Independent    Dependent    Parent Plus Denied Credit Check (5)

**Start Award with Payment Number:** 3

**Clock/Credit Hours in the Loan Period:** 42 (2)

**Loan Period Begin Date:** (6)

**Loan Period End Date:** (7)

**Anticipated Graduation Date:** (8)

**Select a Cost of Attendance Budget:** Awp10 (3)

Subsidized Loan Determination		Unsubsidized/Plus Loan Determination	
Loan Period Cost of Attendance	\$16,520	Loan Period Cost of Attendance	\$16,520
Less EFC	\$0	Less SUB Loan Amount Requested	\$5,850
Less Loan Period Other Financial Aid	\$0	Less Loan Period Other Financial Aid	\$0
Less Pell Scheduled Award	\$7,903	Less Pell Scheduled Award	\$7,903
<b>Unmet Financial Need</b>	<b>\$8,617</b>	<b>Unmet Financial Need</b>	<b>\$2,767</b>

Loan Amt Requested:    **SUB\$** \$5,850      **UNSUB\$** \$2,767      **PLUS\$** \$0

**Calculate Max Loan Amount**    **SUB** (9)      **UNSUB** (10)      **PLUS** (11)

**Calculate Anticipated Grade Level 2 Disb**

Added To Team for Packaging on: 03/28/2013      Package Date: 03/28/2013

Special notation to schools programs whose academic year units are less than 900 units: the number of disbursements will appear on the loan screens, so that the user can modify the number of disbursements for the loan.

Please note: the following steps are numbered in the order in which you should complete them on the screen above and the corresponding numbers are included in the steps below.

If this student is a first time borrower, check the check box "First Time Borrower" at the top of the menu (1). Then, select the payment number in which you would like to start this award, either 1 or 3 (2). Enter the clock/credit hours (or terms) in the loan period (3), and then select a cost of attendance budget from the drop-down menu (4). The cost of attendance can be changed for each student within a program, but should generally be based on standard budgets determined by you.

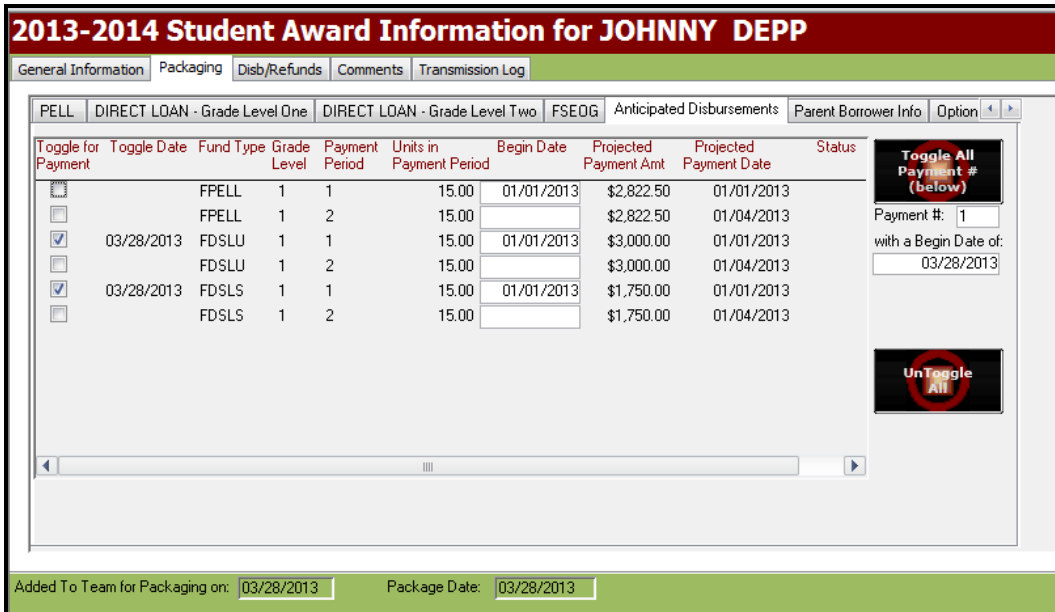
On the top-right side, select the student's dependency status: independent, dependent, or you can select the "Parent Plus Denied Credit Check" option (5). Then enter the loan period begin date and loan period end date (6-7). The loan period should coincide with the length of the student's program or academic year, whichever is shorter. Payments will be distributed in accordance with your payment periods during that loan period. Enter the student's anticipated graduation date (8).

To determine eligibility for subsidized loans, any other financial aid and the EFC must be subtracted from the total cost of attendance. The resulting figure represents "unmet need" and is the amount a student can apply for in a subsidized loan. In the "Subsidized Loan Determination" box, enter the total cost of attendance for the period of the loan. The EFC will be automatically entered in the next box based on the loan period that you entered on the top-right side of the screen. Enter the less other financial aid for period of loan. Then, to the right of the "Calculate MAX Loan Amount" heading, click the "SUB" button to calculate the amount of the award (9). This calculated amount will appear in the "SUB\$" box above.

In the "Unsubsidized/Plus Loan Determination" box, a similar calculation to the Subsidized loan is performed to determine the eligibility for Unsubsidized and PLUS loans, except that the EFC figure is not used in these calculations. Eligibility for Unsub and Plus loans is limited only by cost of attendance less other financial aid. In the "Unsubsidized/Plus Loan Determination" box, the information should already be calculated for you. Then, to the right of the "Calculate MAX Loan Amount" heading, click the "UNSUB" button to calculate the amount of the award (10). This calculated amount will appear in the "UNSUB\$" box above. Then, to the right of the "Calculate MAX Loan Amount" heading, click the "PLUS" button to calculate the amount of the award (11). This calculated amount will appear in the "PLUS\$" box above. Once you have entered all of the student's information in either the "DIRECT LOAN – Grade Level One (or Two)" tab, click on the "Calculate Anticipated Grade Level 1 (or 2) Disb" buttons at the bottom. This will take the information that you have entered for the student, and calculate the anticipated Direct Loan disbursements. This calculation will display on the "Anticipated Disbursements" tab.

Once you click "Calculate Anticipated Grade Level 1 (or 2) Disb" button, you can modify any information as necessary. If you have to make any changes to the data that you have entered, please do so, and then click on the "Calculate Anticipated Grade Level 1 (or 2) Disb" button again. A box will pop up saying, "Any existing Direct Loan Grade Level 1 (or 2) Anticipated Disbursements will be Deleted and Re-calculated Are you sure you want to continue?" If you want to delete the previously-entered information and replace it with the new data, click "Yes." The new data will be reflected in the "Anticipated Disbursements" tab.

To toggle this student’s Direct Loan payment, go to the “Anticipated Disbursements” tab, which is to the right of the “FSEOG” tab. You should now see an entry for the Direct Loan payment that you just calculated in the previous step.



If you are ready to toggle this payment request, check the “Toggle for Payment” box for the appropriate calculation. This should automatically enter the Toggle Date to the right of the check box. If you want to toggle all of the payment requests in the list with a certain payment number and begin date: enter the “Payment #:” in the box in the top-right, enter the date into the “with a Begin Date of:” field, and hit the “Toggle All Payment # (below)” button. To un-toggle all payments in the list, click the “Un-Toggle All” button on the lower-right. The data for this student’s Direct Loan Payment Request is now toggled and will be exported and sent to GEMCOR, Inc. during the next “SEND” transmission.

Next, click on the “Parent Borrower Info” tab to the right of the “Anticipated Disbursements” tab. Please note: you might have to use the navigation arrows to view this tab and any other tabs to the right of this tab. Use these navigation arrows just like you would use a regular scroll bar (see arrow below).

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

PELL | DIRECT LOAN - Grade Level One | DIRECT LOAN - Grade Level Two | FSEOG | Anticipated Disbursements | Parent Borrower Info | **Option**

**Parent Borrower Information**

Driver's License# [ ] State: [ ] Social Security # [ ] Date of Birth [ ]

Email Address (optional) [ ]

Name [ ] Home Phone [ ]

Address [ ]

City [ ]

State [ ]

Zip [ ]

**U.S. Citizenship Status (Check One)**

U.S. Citizen or National

Permanent Resident/Other Eligible Non-Citizen

If (2), Alien Registration No. [ ]

Added To Team for Packaging on: 03/28/2013 Package Date: 03/28/2013

Enter the parent borrower's information accordingly. All questions on this tab need to be entered in order to send the information to GEMCOR for Plus loans. Next, click on the "Optional Student Info" tab. Please note: you might have to use the navigation arrows to view this tab and any other tabs to the right of this tab. Use these navigation arrows just like you would use a regular scroll bar (see arrow below).

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

DIRECT LOAN - Grade Level Two | FSEOG | Anticipated Disbursements | Parent Borrower Info | **Optional Student Info** | Optional Parent Info | Additic

**Student Borrower Information**

Driver's License# [ ] State: [ ] Social Security # 111-22-3888

Email Address (optional) [ ]

Name JOHNNY DEPP

Address 25350 WAYVERLY LANE Home Phone 312-555-1212

City HOLLYWOOD State CA Zip 90210

**References**

Name [ ]

Address [ ] City [ ] State [ ] Zip [ ]

Phone [ ] Relationship to Borrower: [ ]

Name [ ]

Address [ ] City [ ] State [ ] Zip [ ]

Phone [ ] Relationship to Borrower: [ ]

Added To Team for Packaging on: 03/28/2013 Package Date: 03/28/2013

Enter the student borrower's information accordingly. When you are finished entering the information on this tab, you can move on to clicking on the "Optional Parent Info" tab.



The information on the “Optional Parent Info” tab is optional for your school. If you choose to enter this information, simply click on the “Optional Parent Info” tab and enter the parent borrower’s information accordingly. Next, click on the “Additional Information” tab.

EFC Intermediate Values					
Mon 1	00000	Mon 4	00000	Mon 7	00000
Mon 2	00000	Mon 5	00000	Mon 8	00000
Mon 3	00000	Mon 6	00000	Mon 10	00000
Mon 11	00000	Mon 12	00000		

Aggregate Amounts:			
	Outstanding	Pending	Total:
	Prin. Bal.	Disb (s):	
FFEL/Direct Loans:			
Subsidized Loans:	\$ 7000	\$ 0	\$ 7000
Unsubsidized Loans:	\$ 10479	\$ 0	\$ 10479
TEACH Loans:	\$ N/A	\$	\$ N/A
Combined Loans:	\$ 17479	\$ 0	\$ 17479

This tab includes information on the student’s Intermediate Values (EFC) that were automatically pulled from the student’s ISIR. You do not have to enter any information here, but it is convenient for you to view the information in each Month’s box.

## FSEOG



FSEOG stands for Federal Supplemental Educational Opportunity Grant and is considered a Campus Based Program designed to supplement a student's Federal PELL Grant award. To process an FSEOG payment, first select the student from the TEAM Main Menu, and then click on the "PROCESS" button at the bottom of the screen. Then, click on the "Packaging" tab to the right of the "General Information" tab. Then, click on the "FSEOG" tab to the right of the "DIRECT LOAN – Grade Level Two" tab.

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

FSEOG | Anticipated Disbursements | Parent Borrower Info | Optional Student Info | Optional Parent Info | Additional Information

Select a Cost of Attendance Budget: .MwP9 (1)

Tuition and fees for full academic year	\$9,300.00
Books, supplies, equipment	\$600.00
Room and Board (Minimum of \$1500 for a student with no dependents, who is living with parents, or \$2500 minimum for all other students)	\$5,463.00
Miscellaneous expenses, transportation (Determined by school)	\$0.00
Other, e.g., dependent care or disability expenses (Determined by school)	\$0.00

Summary of expected resources each source:

<b>Total COA</b>	<b>\$15,363.00</b>
Requested SUB	\$3,500.00
Requested UNSUB	\$6,000.00
Requested Plus	\$0.00
Prorated Pell	\$5,645.00
Other	\$0.00
Prorated EFC	\$0.00
Unmet Need:	\$218.00

FSEOG Amount Requested: \$218.00 (2)

54.5 25% School Share  
163.5 75% Federal Share

Start Award with Payment Number: 1  
3

Calculate Anticipated FSEOG Disb (3)

Calculate MAX FSEOG Award

Added To Team for Packaging on: 03/28/2013 Package Date: 03/28/2013

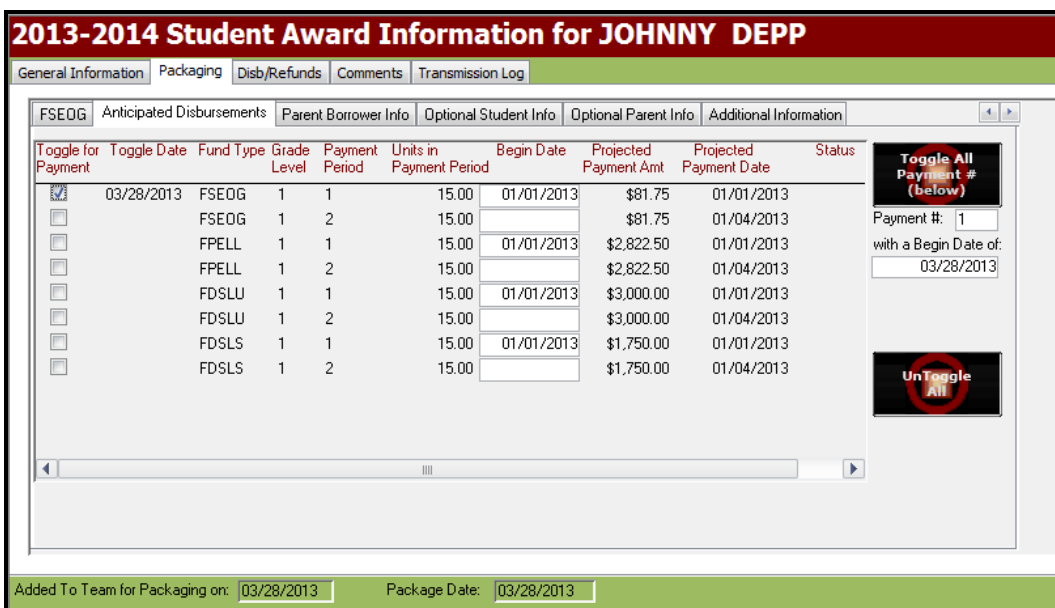
Please note: the following steps are numbered in the order in which you should complete them on the screen above and the corresponding numbers are included in the steps below.

The cost of attendance values may change for each student within a program, but should generally be based on standard budgets determined the school. Select the Cost of Attendance budget from the drop down menu at the top of this tab (1). In step A, enter the tuition and fees for a full academic year. In step B, enter the amount for books, supplies, and equipment. In step C, enter the amount for room and board (determined by school). In step D, enter the amount of miscellaneous expenses and transportation (determined by school). In step E, enter other costs (e.g., dependent care or disability expenses). The total cost of attendance will be calculated for each student in the specific program that you identified above.

Once this information has been entered, you can move on to the right side of this menu. Here you will find a summary of the resources this student expects to receive during the award period from each source. Calculate unmet need by clicking the "Calculate MAX FSEOG Award" button (2). This will calculate the FSEOG Amount to be requested. On the bottom left corner of this tab, enter the starting payment period number for the award, either 1 or 3 (3). Once you have entered all of the student's information in the FSEOG tab click on the "Calculate Anticipated FSEOG Disb" button at the bottom. This will take the information that you have entered for the student, and calculate the anticipated FSEOG disbursements. This calculation will display on the "Anticipated Disbursements" tab.

Once you click “Calculate Anticipated FSEOG Disb,” you can modify any information as necessary. If you have to make any changes to the data that you have entered, please do so, and then click on the “Calculate Anticipated FSEOG Disb” button again. A box will pop up saying, “Any existing FSEOG Anticipated Disbursements will be Deleted and Re-calculated Are you sure you want to continue?” If you want to delete the previously-entered information and replace it with the new data, click “Yes.” The new data will be reflected in the “Anticipated Disbursements” tab.

To toggle this student’s FSEOG payment, go to the “Anticipated Disbursements” tab, which is to the right of the “FSEOG” tab. You should now see an entry for the FSEOG payment that you just calculated in the previous step.



If you are ready to toggle this payment request, check the “Toggle for Payment” box for the appropriate calculation. This should automatically enter the Toggle Date to the right of the check box. If you want to toggle all of the payment requests in the list with a certain payment number and begin date: enter the “Payment #:” in the box in the top-right, enter the date into the “with a Begin Date of:” field, and hit the “Toggle All Payment # (below)” button. To un-toggle all payments in the list, click the “Un-Toggle All” button on the lower-right. The data for this student’s Pell Payment Request is now toggled and will be exported and sent to GEMCOR, Inc. during the next “SEND” transmission.

**Verification:** is a process that requires an institution to confirm the data that a student has included in his/her application for federal assistance. Generally, institutions must perform verification procedures on selected files. A file has been selected for verification if the EFC number on the SAR or ISIR is followed by an asterisk, “\*.” If the student you selected has been selected for “verification,” a box will appear asking if complete and accurate information is on file. You must have this completed before requesting any Financial Aid for a student.

**Additional Documentation:** Other additional documentation that GEMCOR will need to receive in order to process the students' direct loans include the students' Promissory Notes and/or the Parent PLUS note. The student can fill out an electronic master promissory note, or E-MPN, as well as a Parent PLUS E-MPN at [www.studentloans.gov](http://www.studentloans.gov). This will automatically link with the loan origination, and is much faster and convenient than the paper prom notes. You can also send the original paper note to GEMCOR, but this usually takes an additional 2-3 weeks to be processed by COD.

Please see the next section titled, "Subsequent Payments" for information on second payment requests.

## ***Subsequent Payments***



Our systems will automatically schedule future payments to a student at the time the first payment on a SAR or ISIR is processed. The schedule shall coincide with the remaining payment periods in the institution's academic year. When students reach a subsequent payment period and the institution has determined that the students have been maintaining satisfactory progress in accordance with published standards, you may request subsequent payments through your TEAM software's electronic process. We will then process the students' next payments. GEMCOR does not automatically process future payments based on scheduled dates. You must notify us that a student has completed all requirements of the prior payment period before future payments are generated.

## ***Disbursements/Refunds***

In the event a borrower withdraws from your school, you may discover that some of the loan/pell money received by the borrower was unearned. After determining how much loan/pell money is unearned, you will return these funds by depositing the unearned amount back into your federal funds bank account and notifying GEMCOR about this return of funds. We will then adjust the borrower's account with the Department of Education and either use the returned funds on hand for a future borrower, or return them to the Department of Education electronically.



If you would like to request a refund for a particular student, first select the student from the TEAM Main Menu, and then click the "PROCESS" button at the bottom of the screen. Then click on the "Disb/Refunds" tab to the right of the "Packaging" tab.

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

**Select a Disbursement to Refund:**

AwardYr	Type	Loan Type	Check#	Pgm#	Yr#	Pay\$	Pay Date	Refund Status

Refund Date:   
 Refund Amount:

**Post the Refund**

**Delete The Refund**

This function is password protected and should only be used if you have posted a refund in error that needs to be deleted. Please call GEMCOR at 1-888-GEMCOR-8 for the password to Delete a Refund.

\* data may not reflect refunds processed outside of this system  
 Use the "Comments" tab to record and additional information that you would like to convey to GEMCOR regarding the toggled refund.  
 Refund Status Key: FLAGGED= toggled to be exported to GEMCOR, BATCHED=Exported to Gemcor but not confirmed, CONFIRM=Received by GEMCOR

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**Post The Refund:** Here you will see a list of disbursements that have been paid on this student. From this list, select a disbursement to refund. Enter the refund date and the refund amount. Then click the "Post the Refund" button to post this refund to this student's record. This will be exported and sent to GEMCOR the next time you complete the "send" function.

**NEW: Delete The Refund:** Select the refund from the list that you wish to delete. Click the "Delete The Refund" button. This function is password protected and should only be used if you have posted a refund in error that needs to be deleted. Please call GEMCOR at 1-888-GEMCOR-8 for the password to Delete a Refund.

## Comments

There is a "Comments" tab under the "PROCESS" menu to post any necessary comments about this student and/or their disbursements. Do not use the Comments box for additional information about Refunds. Refunds are sent separate from payment request files.

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

TRANSFER STUDENT 12-15-2012

Added To Team for Packaging on: 03/28/2013      Package Date: 03/28/2013

### Transmission Log

There is a "Transmission Log" tab under the "PROCESS" menu that displays a list of all of the requests for payment that you have made on this particular student.

**2013-2014 Student Award Information for JOHNNY DEPP**

General Information | Packaging | Disb/Refunds | Comments | Transmission Log

Transaction Status Date	Status	Student ID and Name	Toggle Date	Fund Type	Grd Lvl	Pay Prd	Hrs in Prd	Begin Date	Projected Payment Amt	Projected Payment Date
03/28/2013	BATCHED	111223333DE01 DEPP, JOHNNY	03/28/2013	FSE0G	1	1	15	01/01/2013	\$81.75	01/01/2013

Added To Team for Packaging on: 03/28/2013      Package Date: 03/28/2013

## ***Transmit***

The TEAM System provides all the software necessary for you to begin processing your Title IV award data through GEMCOR electronically. After entering your FAFSA documents into the federal CPS web site through the Department of Education's EDEXpress FAA On-Line Access system, you will be able to electronically receive your students' ISIRs through our TEAM System.

Once you have received your ISIRs through TEAM, you will be able to electronically request Federal Pell awards, FSEOG awards or Federal Direct Loan awards with virtually no paperwork. Simply select the desired student record from the easy to use pick lists, enter your "Formula Sheet" or "Loan Certification Worksheet" information, then export your data and send it all electronically through today's state of the art FTP, Internet based file transfers.

Further, you will be able to request second payments and notify GEMCOR of any refunds paid through the same FTP, batch and transfer process. The entire process works on an easy to remember acronym we call **E-T-E-S** **Enter, Toggle, Export, Send**.

### **Step 1 - ENTER**

Enter the award information (formula sheet, or loan certification worksheet) into your TEAM student record. You can do this by first selecting a student from the student record list on the 2012-2013 home screen and then click the "PROCESS" button at the bottom of the screen. You have now entered into this student's record. Enter the student's award information here.

### **Step 2 - TOGGLE**

When you are ready to export and send a payment request to GEMCOR, you must first toggle the student record. Toggle/Flag each student payment type by checking the appropriate box on the "Anticipated Disbursements" tab (explained in the "Process" section of this manual). This student's record is now ready to be exported and sent to GEMCOR. You can now move on to another student record and enter their award information.

(These toggle boxes are located under the "PROCESS" function in the Pell and Direct Loan tabs)

### **Step 3 - EXPORT**

Each day, export the award data that was entered into TEAM during step 1. This process batches all of your payment request information for that day into a single, easy to transmit file that remains on your machine until you "SEND" it to GEMCOR. After you export the award data, you can either choose to send the data now or you can choose to send it at a later time. After you have processed all of your TEAM data for the day, the data must be exported into a file to be transmitted. The first way to export and send records to GEMCOR is to click on the "TRANSMIT" button on the TEAM Main Menu.

# Transmission Log & Bulk Payment Request

**Export 2013-2014 Award Data to GEMCOR, INC.**

**Pre-Transmit Review**

If you would like to preview a listing of the student records that are marked for transmission, select "Pre-Transmission Review" on the left. You cannot run this report after you begin the export process. To print this listing, Press [Ctrl-F] while in preview mode.

**Student Data Sheet**

Only the student records that you marked for transmission will be exported. When you are ready to perform the export, select "Export and Send to GEMCOR" at the left. You will be prompted to send the records to GEMCOR for Payment.

**Export and send to GEMCOR**

You must #1 Toggle, #2 Export, #3 Send, #4 Receive Payment Confirmation in order to successfully transmit payment requests to GEMCOR. If you do not receive a payment confirmation within one business day of transmittal, please call our offices at: 1-888-GEMCOR-8

**TRANSMISSION LOG**

Transaction Status Date	Status	Student ID and Name	Toggle Date	Fund Type	Grd Lvl	Pay Prd	Units In P.P.	Begin Date	Projected Pmt Amt	Projected Pmt Date
03/28/2013	BATCHED	111223333DE01 DEPP, JOHNNY	03/28/2013	FSEOG	1	1	15	01/01/2013	\$81.75	01/01/2013

**Re-Toggle Batch (Above) with Batched Date of:**

**BULK PAYMENT REQUEST**

Use the box below to toggle anticipated disbursements whose projected payment dates fall before:

Toggle for Payment	Status	Student ID and Name	Fund Type	Grd Lvl	Pay Prd	Units In P.P.	Begin Date	Projected Pmt Amt	Projected Pmt Date
<input type="checkbox"/>		111223333DE01 DEPP, JOHNNY	FSEOG	1	2	15		\$81.75	01/04/2013
<input type="checkbox"/>		111223333DE01 DEPP, JOHNNY	FPELL	1	1	15	01/01/2013	\$2,822.50	01/01/2013
<input type="checkbox"/>		111223333DE01 DEPP, JOHNNY	FPELL	1	2	15		\$2,822.50	01/04/2013
<input type="checkbox"/>		111223333DE01 DEPP, JOHNNY	FDSL	1	1	15	01/01/2013	\$3,000.00	01/01/2013
<input type="checkbox"/>		111223333DE01 DEPP, JOHNNY	FDSL	1	2	15		\$3,000.00	01/04/2013
<input type="checkbox"/>		111223333DE01 DEPP, JOHNNY	FDSL	1	1	15	01/01/2013	\$1,750.00	01/01/2013
<input type="checkbox"/>		111223333DE01 DEPP, JOHNNY	FDSL	1	2	15		\$1,750.00	01/04/2013

**Toggle All**

Click the "Toggle All" button if you want to toggle all anticipated disbursements listed in the box to the left. If there is already a begin date entered, this function will NOT toggle that disbursement line. These disbursements will be toggled with a begin date of:

**UnToggle All**

Click the "UnToggle All" button if you would like to untoggle all disbursement records that you have previously toggled by using the "Toggle All" button above. Clicking "UnToggle All" will untoggle all disbursements you have entered with a begin date of:

**NEW:**

**BULK PAYMENT REQUEST:** Use this function to quickly toggle anticipated disbursements whose projected payment dates are prior to today or prior to a given date. The Bulk Payment Request form above displays all anticipated disbursements whose projected payment dates fall before "05/28/2013". This field's default value is the date that the user is accessing the form. The user is able to change this date to view anticipated disbursements that fall before the date that they enter into the input box.

Click the "Toggle All" button if you want to toggle all anticipated disbursements listed in the Bulk Payment Request box. If there is already a begin date entered, this function will NOT toggle that disbursement line. Enter the begin date that you wish to toggle all disbursements with and click the "Toggle All" button.

Click the "UnToggle All" button if you would like to untoggle all disbursement records that you have previously toggled by using the "Toggle All" button above. Enter the begin date that you wish to untoggle all disbursements that have been toggled with that begin date and click the "UnToggle All" button.

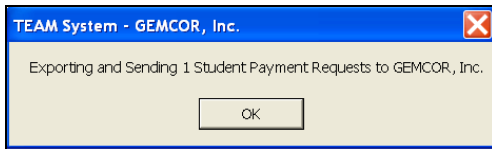




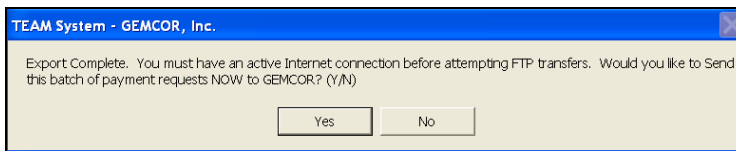
It is recommended that you first review the “Pre-Transmit Review” (the first button on this tab) to ensure that all students are included on the report. If after reviewing the transmission report, should you determine that additional data needs to be processed, you may exit the “EXPORT” function to process additional data before transmission.

If all of the records are correct on the Pre-Transmit Review, you have the choice of printing a copy of the award data for student files by clicking on the “Student Data Sheet” button (the second button on this tab). This report can be printed for each student any time under the Process Module for the selected student. Then, click on the “Export and Send to GEMCOR” button (the third button on this tab).

Once you click on the “Export and Send to GEMCOR button,” the box below will appear to tell you how many Student Payment Requests you are exporting and sending to GEMCOR. If this is correct, click the “OK” button.



The box below will appear to tell you that the export is complete.



Next, go to “Step 4 – SEND” (below) to see how to send your payment requests to GEMCOR.

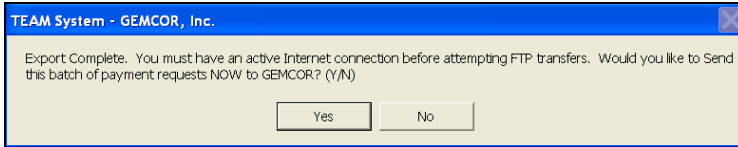
At the bottom of this menu you will find a white box that is the Transmission Log. This will show a listing of all of the transmissions that you have sent to GEMCOR. A payment request is not successfully received until you have received a payment confirmation for the request. If you do not receive a payment confirmation within one business day of transmittal, please call our offices at 1-888-GEMCOR-8.

If you want to re-toggle any of the payment requests that you have previously tried to send: highlight the appropriate line(s) that you would like to re-toggle, enter the batched date in the textbox at the bottom of the screen, and hit the “Re-Toggle Batch (Above) with Batched Date of:” button. Then hit the “Export and Send to GEMCOR” button and follow the instructions in “Step 3 – EXPORT” (explained above) and “Step 4 – SEND” (explained below).

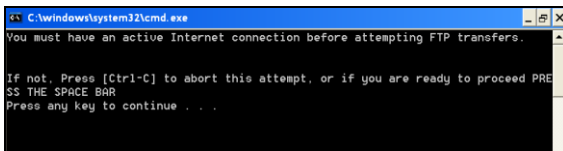
## Step 4 – SEND

Once you have toggled and exported the records, you can send the data two different ways.

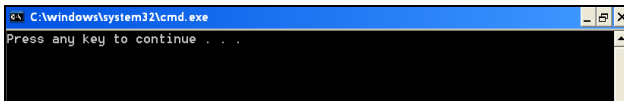
- Send Option Number 1:** The box below, which appears after you have exported the award data (explained above), will remind you that you need to have an active internet connection in order to make FTP transfers. If you would like to send this batch of payment requests to GEMCOR now, click the “yes” button. If you would like to send this batch of payment requests to GEMCOR at a later time, click the “NO” button, and you can send it later by using the “SEND” button on your command center home screen (which is explained in sending option number 2).



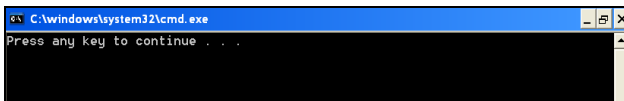
After you hit the “YES” button the following black boxes will open in order to complete the transfer. It is very important that you do NOT click the “X” to force close these boxes. The box below will open, and remind you that you need to have an active internet connection in order to make FTP transfers. It will ask you to press any key to continue, and you should press the space bar.



The transfer will now begin. Once the transfer is completed another black box will appear. It will ask you to press any key to continue, and you should hit the space bar again.



A third black box will appear. It will ask you to press any key to continue, and you should hit the space bar for the third time.



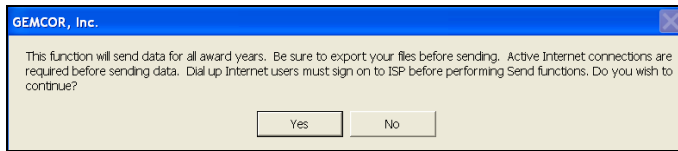
This will complete the FTP transfer and your payment request files have now been exported and sent to GEMCOR. If you do not receive a confirmation file within 24 hours, please call GEMCOR at 1-888-GEMCOR-8.

- Send Option Number 2:** The second way in which you can send records to GEMCOR is to click the “SEND” button on the Command Center home screen. In order to send records to GEMCOR in this way, you must have already exported the data (explained in step 3) prior to hitting the SEND button on the Command Center home screen.



**SEND**

Once you have clicked the “SEND” button, the following box will appear. This box reminds you that this function will send data for all award years. In order to send data to GEMCOR in this way, you must have exported the data prior to hitting the send button on the Command Center screen. This box also reminds you that you need an active internet connection in order to send the data. Click the “Yes” button in this box.



Just like in the first option to send the data to Gemcor, the black boxes will appear. It is very important that you do NOT click the “X” to force close these boxes. You should follow the prompts that the boxes give you, and when they ask you to press any key, you should hit the space bar to continue.

**Always remember ETES, Enter, Toggle, Export, Send**

If after one business day, the status in the transmission log still says “BATCHED”, that means that we have NOT received the payment request. Please call our offices immediately at 1-888-GEMCOR-8

# Receive



RECEIVE

In order to receive information from GEMCOR, such as your school's ISIR's, confirmation of payments, and disbursement journals you will need to click on the "RECEIVE" button on your Command Center screen.

The following black boxes will open in order to complete the transfer. It is very important that you do NOT click the "X" to force close these boxes. The box below will open, and remind you that you need an active internet connection in order to make an FTP transfer. It will ask you to press any key to continue, and you should press the space bar.

```
C:\windows\system32\cmd.exe
You must have an active Internet connection before attempting FTP transfers.
If not, Press [Ctrl-C] to abort this attempt, or if you are ready to proceed
Press any key to continue . . . _
```

The transfer will now begin. Once the transfer is completed another black box will appear. It will ask you to press any key to continue, and you should hit the space bar again.

```
C:\windows\system32\cmd.exe
Your transmission is complete
Please press THE SPACE BAR to view any messages. Do not "X-out" of this window.
Do NOT hit ESC. DO NOT HIT ENTER.
Press any key to continue . . . _
```

After you hit the space bar for the second time, the following box will appear. This box will tell you if you have any new messages or if you have any new ISIR files that can be printed. In the box below, there are no new messages and no new ISIR files to be printed. This box will ask you to press any key to continue, and you should hit the space bar for the third time to complete the receive function.

```
C:\windows\system32\cmd.exe
You have no new messages
You have no new ISIR files to be printed
Press any key to continue . . . _
```

## Print, Preview, & Quick View

During a "receive" function, you will automatically receive any new ISIR data in GEMCOR's systems. After receipt of an ISIR file from GEMCOR, the file must be imported into the TEAM database. This import function will not only allow you to print the ISIRs, but will also store the data in the TEAM database for future electronic award request functions.



If you want to print an ISIR Summary of all current ISIRs in TEAM, click the "PRINT ISIR SUMMARY" button. All student's names, student ID numbers, EFC's, and the date the ISIRs were added into TEAM will be included on the selected student's ISIR Summary.



If you would like to preview a student's ISIR, select a student from the list and click the "Preview ISIR" button at the bottom of the screen. Select this option if you want to view the student's ISIR on your computer screen instead of printing the ISIR out. This is a preview of all of the information that is on the student's printed ISIR.



If you would like to see a student's ISIR quick view, select a student from the list and click on the "Quick View" button at the bottom of the screen. The ISIR Quick View includes a summary of the information that appears on the selected student's ISIR.



If you would like to print a student's ISIR, select a student from the list and click on the "Print ISIR" button at the bottom of the screen. This will print the selected student's ISIR to your computer's default printer.

## How to Check or Clear Your Messages

A rectangular button with a light green background and a thin grey border. The text "Check Messages" is written in a darker green font.

A rectangular button with a light green background and a thin grey border. The text "Clear Messages" is written in a darker green font.

You will find these two buttons on the bottom left hand side of your Command Center home screen. If you want to check to see if you have any messages waiting to be read, click the "Check Messages" button. When you are done reading your messages, you can click the "Clear Messages" button. If you have a message that says there are ISIRs that are currently waiting to be imported into TEAM, you must first import those ISIRs before you can draw down more ISIRS through your next receive. If you have a message that says you have a pending payment file waiting to be sent, make sure that all of your selected student records are marked as toggled, and do a "SEND" function to export the student records to GEMCOR.

## Versions of TEAM

### How to Find Out What Version of TEAM You Currently Have

In order to find out what version of TEAM you currently have, open the Command Center and click on the correct TEAM award year. On your TEAM home screen, look at the upper left side of the screen. Here, in red letters, you will find your current version of TEAM. In the photo to the right, the current version of TEAM is version 003C.



Title IV Electronic Awards Management  
System for Windows  
Version: 003 C

In this example, the "003" represents the version number of TEAM that the system is currently using. The "C" represents that this user's TEAM system is operating off of their computer's C drive.

Next to the version number (ex. 003), you will see either the letter C or T. If you have the letter C, this means that your TEAM software is running off of your C drive on your computer, and you can only use TEAM on one user's machine. If you have the letter T, this means that your TEAM software is running off of your school's T drive, which is a network drive. If you have the T version, users can access the TEAM software from multiple machines/locations.

### How to Find Out What the Most Current Version of TEAM Is

In order to find out what the most current version of TEAM is, open your web browser and go to [www.gemcorinc.com](http://www.gemcorinc.com). Then, click on the "Software" link at the top of the page. Under the picture that is labeled "TEAM," you can see the number of the most current version of TEAM. In the photo to the right, the current version of team is version 13. If the version number on your home screen of TEAM does not match the most current version number on the website, read on to find out how to get the most current version of TEAM.



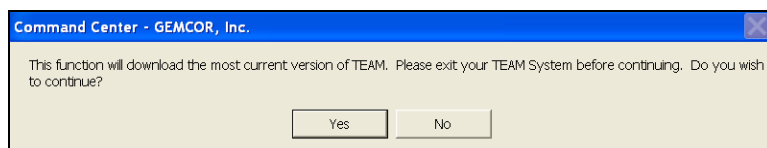
### How to Get the Most Current Version of TEAM



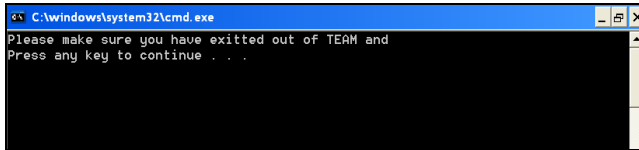
TEAM Upgrade

In order to get the most current version of TEAM, first make sure that you are closed out of the TEAM program. Then, open your Command Center. On the TEAM side of the Command Center, click on the "Team Upgrade" button.

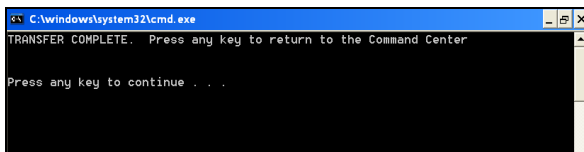
The box below will open and remind you to exit your TEAM System. Make sure you are out of TEAM, and click yes saying that you want to continue.



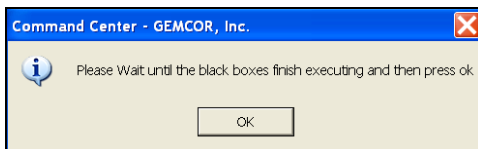
The following black boxes will open in order to complete the transfer. It is very important that you do NOT click the "X" to force close these boxes. The box below will open, and remind you to be closed out of your TEAM program. It will ask you to press any key to continue, and you should hit the space bar.



The transfer will now begin. Once the transfer is completed another black box will appear. It will ask you to press any key to continue, and you should hit the space bar again.



After you hit the space bar for the second time, the black box should close and the following box will appear. You should click the "OK" button.



You should now have the most current version of TEAM. You can verify this by checking your current version of TEAM on your TEAM home screen. (See the section titled "How to find out what version of TEAM you currently have" above).

**If you do not have the "Team Upgrade" button on the TEAM side of your Command Center, or if the button is not enabled, please call**  
**GEMCOR at 1-888-GEMCOR-8**  
**so that we can give you the necessary update.**

## Training

GEMCOR has expanded our office to accommodate the additions of both staff and clients! The expansion includes new employee offices as well as state-of-the-art conference and training rooms! Come on in for a training session and see our remodeled office.

GEMCOR hosts a series of small, informal training sessions on Title IV program administration each year. These sessions will be condensed to a one-day format and will cover a brief overview of FAFSA and ISIR processing with more significant emphasis on new regulations and policies that have been enacted through recent legislation. Usually the training sessions are held at our Bolingbrook, Illinois office. Most sessions can comfortably accommodate 20 participants per session. Meetings of this size should provide a great opportunity for hands-on training in an informal and open forum like setting. There will be no charge for participants to attend these sessions. When the new Seminar Schedule is updated, it will be posted to our webpage at [www.gemcorinc.com](http://www.gemcorinc.com) on the DOWNLOADS page. You can confirm your wish to attend any of the meetings by fax or email. Email Steve at [steve@gemcorinc.com](mailto:steve@gemcorinc.com). Your registration will be confirmed by email. Space is limited, so let us know as soon as possible. Call our office with any questions, and we hope to see you at one of our meetings.



Our New Training Facility Seats up to 20 Participants



## Support



Our office provides toll free technical support on any educational or financial aid issues during normal business hours (Monday-Friday 9:00am to 5:00pm Central Time). In addition to general daily inquiries, we can provide assistance to you with program review responses, accreditation concerns, & eligibility and certification issues.

We would be happy to assist you with any questions you might have regarding the services that GEMCOR, Inc. can provide to your business. Should you want to contact us for more detailed information on how GEMCOR, Inc. can support your institution, please let us know. Your questions are very important to us.



For support with any questions that you have, you can contact **Don Grybas**, *President of GEMCOR, Inc.*

Don can be reached at 1-888-GEMCOR-8 ext. 101 or by email at [don@gemcorinc.com](mailto:don@gemcorinc.com).

### PELL Department



For support with PELL grants please contact **Steve Berry**, *Vice President of GEMCOR, Inc.*

Steve can be reached at 1-888-GEMCOR-8 ext. 103 or by email at [steve@gemcorinc.com](mailto:steve@gemcorinc.com).

### Federal Direct Student Loan Department

For support with Direct Loans please contact **Megan Refness**, *Director of Federal Direct Student Loan Division*, or **Michele Thompson**, *Federal Direct Loan Officer*.



Megan can be reached at 1-888-GEMCOR-8 ext. 105 or by email at [megan@gemcorinc.com](mailto:megan@gemcorinc.com).



Michele can be reached at 1-888-GEMCOR-8 ext. 109 or by email at [michele@gemcorinc.com](mailto:michele@gemcorinc.com).

## ***Information Systems & Technologies Department***

For support with **TEAM** or **TRAX** please contact **Laurie Grybas**, *Director of Information Systems & Technologies Division*, or **Terrah Spoolstra**; **Thomas Hodorowski**; or **Stephen Zolper**, *Information Systems & Technologies Officers*.



Laurie can be reached at 1-888-GEMCOR-8 ext. 102 or by email at [laurie@gemcorinc.com](mailto:laurie@gemcorinc.com).



Terrah can be reached at 1-888-GEMCOR-8 ext. 108 or by email at [terrah@gemcorinc.com](mailto:terrah@gemcorinc.com).



Stephen can be reached at 1-888-GEMCOR-8 ext. 110 or by email at [stephen@gemcorinc.com](mailto:stephen@gemcorinc.com).

## ***Administrative Support***



For support with Cash Management, Bank Reconciliations, or Refund Requests please contact **Carri Catalano**, *Cash Management Officer*. Carri can be reached at 1-888-GEMCOR-8 ext. 106 or by email at [carri@gemcorinc.com](mailto:carri@gemcorinc.com).



For support with SSCE's (Student Enrollment Reporting Errors), FAFSA's (Free Application for Federal Student Aid), or Verification questions please contact **Jacki Griffin**, *Administrative Officer*. Jacki can be reached at 1-888-GEMCOR-8 ext. 104 or by email at [jacki@gemcorinc.com](mailto:jacki@gemcorinc.com).



For support with SSCR's (Student Enrollment Reporting), please contact **Sue Berry**, *Administrative Officer*. Sue can be reached at 1-888-GEMCOR-8 ext. 111 or by email at [sue@gemcorinc.com](mailto:sue@gemcorinc.com).

**GEMCOR, Inc.**

**400-D Quadrangle Drive  
Bolingbrook, Illinois 60440**

**Phone: 1-888-GEMCOR-8**

**Fax: 1-888-9-GEMCOR**

**Phone: 1-888-436-2678**

**Fax: 1-888-943-6267**