



PACKAGING - PREPARING FOR PACKAGING

FA ERP Support

April 2021

LOGISTICS AND AGENDA

Times	Activity
1:00 – 1:10	Greet/Attendance/Objectives
1:10 – 1:20	FA Self Service
1:20 – 2:00	Item-types and packaging plans configurations
2:00 – 2:15	Reports to identify students who are ready to review/package
2:15 – 2:55	Mass packaging versus online packaging
2:55 – 3:00	Session Wrap-Up

GROUND RULES

- ✓ Remove external distractions
- ✓ Hold questions until Q&A time after each section
- ✓ Mute your line when not speaking
 - *Do NOT place Webex line on hold. Use Mute.*
 - *Please leave your line on Mute unless you are speaking*
 - *Sessions are being recorded*



OBJECTIVES











During this worksession, we will review:

- FA Self Service
- Item-types and packaging plans configurations
- Reports to identify students who are ready to review/package
- Mass packaging versus online packaging

FA SELF SERVICE



▼ etcLink Student Homepage

Message Center 	Tasks  1 To Do's 2 Holds	Academic Progress 	Manage Classes 
Financial Aid 	Financial Account 	Academic Records 	Profile  [Redacted]
Additional Resources 	Admissions 		



< ctcLink Student Homepage
View Financial Aid

[Financial Aid](#)
Select Aid Year to View

Select the aid year you wish to view

Aid Year	Institution	Aid Year Description
2017	Spokane CC	2016-2017 Financial Aid Year
2022	Spokane Falls CC	2021-2022 Financial Aid Year
2021	Spokane Falls CC	2020-2021 Financial Aid Year

Aid years listed indicate your access to eligibility information regarding your Financial Aid Application.

When you allow FA Self Service access, students are able to click the link to the aid year.



This is what it looks like when the student is not awarded yet. They only have links to *Financial Aid Summary* and *Satisfactory Academic Progress*.

Financial Aid

Self-Service Links

2021-2022 Financial Aid Year

User-defined text (14409,551)

You have no financial aid awards available for viewing in this aid year.

[Financial Aid Summary](#) [Satisfactory Academic Progress](#)

[Return to Aid Year Selection](#)



< ctcLink Student Homepage
View Financial Aid

[Financial Aid](#)

Award Summary

2021-2022 Financial Aid Year

Select the term hyperlinks below to see more detailed information.
Currency used is US Dollar

Financial Aid Summary

Satisfactory Academic Progress

[Accept/Decline Awards](#)

FALL 2021 Term Award Detail

FALL 2021 [View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00
Worker Retraining Tuition	Grant	3,333.00	3,333.00
Term Totals		5,333.00	5,333.00

WINTER 2022 Term Award Detail

WINTER 2022 [View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00



[< FA Award Acknowledgement](#) [View Financial Aid](#)

Financial Aid

Financial Aid Summary

2021-2022 Financial Aid Year

The information below is a calculation of your estimated need.

Estimated Financial Aid Budget	19,137.00
Expected Family Contribution	0.00 -
Estimated Need	19,137.00
Total Aid	16,000.00 -
Remaining Need	3,137.00

Currency used is US Dollar

This is your financial aid eligibility based on your estimated financial aid (budget) costs, family contribution, and estimated need for this aid year.

[Return](#)



Financial Aid

Estimated Financial Aid Budget

2021-2022 Financial Aid Year

Listed below is an estimate of items used to determine your costs.

Estimated Financial Aid Budget Breakdown

FALL 2021

Category Description	Amount
Books/Supplies	378.00
Housing/Food/Utilities	3,290.00
Misc/Personal	700.00
Transportation	450.00
Tuition/Fees	1,561.00
Term Total	6,379.00

WINTER 2022

Category Description	Amount
Books/Supplies	378.00
Housing/Food/Utilities	3,290.00



Financial Aid

Award Summary

2021-2022 Financial Aid Year

Select the term hyperlinks below to see more detailed information.

Currency used is US Dollar

[Satisfactory Academic Progress](#)

[Financial Aid Summary](#)

[Accept/Decline Awards](#)

FALL 2021 Term Award Detail

FALL 2021

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00
Worker Retraining Tuition	Grant	3,333.00	3,333.00
Term Totals		5,333.00	5,333.00

WINTER 2022 Term Award Detail

WINTER 2022

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00



[< ctcLink Student Homepage](#) [View Financial Aid](#)

Satisfactory Academic Progress

[Financial Aid](#)

2021-2022 Financial Aid Year

SAP Status Meeting Satis Acad Progress

For more information, go to
<http://www.spokanefalls.edu/Admissions/FinancialAid/ProgressGPA.aspx>

Message
Satisfactory academic progress (SAP) is used to define successful completion of coursework to maintain eligibility for student financial aid. Federal regulations require this institution to establish, publish and apply standards to monitor your progress toward completion of your certificate or degree program. If you fail to meet these standards, you will be placed on financial aid warning or suspension. Completion toward your program is measured by GPA, time frame to completion, and percentage of courses completed you attempt.

[Return](#)



Financial Aid

Award Summary

2021-2022 Financial Aid Year

Select the term hyperlinks below to see more detailed information.

Currency used is US Dollar

[Satisfactory Academic Progress](#)

[Financial Aid Summary](#)

[Accept/Decline Awards](#)

FALL 2021 Term Award Detail

FALL 2021

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00
Worker Retraining Tuition	Grant	3,333.00	3,333.00
Term Totals		5,333.00	5,333.00

WINTER 2022 Term Award Detail

WINTER 2022

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00



< Aid Year Selection for Viewing
Accept/Decline Awards

Financial Aid

Award Package

2021-2022 Financial Aid Year

You are eligible to receive the awards listed below. Please review each award and corresponding message. You may Accept and/or Decline any or all of the awards that are currently available.

Last Updated 04/22/2021 12:02:42PM Status New Package

Award	Category	Career	Offered	Accepted	Accept	Decline
Worker Retraining Tuition	Grant	Undergraduate	10,000.00	10,000.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Opportunity Grant Tuition	Grant	Undergraduate	6,000.00	6,000.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Total			16,000.00	16,000.00		

Accept All

Decline All

Clear All

Update Totals

Currency used is US Dollar

Submit

[Account Inquiry](#) [Consumer Information](#)
[Request Counselor Action](#)
[Return to Award Summary](#)

The controls to allow a student to accept/deny the item-type is on the third tab of the **Financial Aid Item Types** page.



Financial Aid

Award Summary

2021-2022 Financial Aid Year

Select the term hyperlinks below to see more detailed information.

Currency used is US Dollar

[Satisfactory Academic Progress](#)

[Financial Aid Summary](#)

[Accept/Decline Awards](#)

FALL 2021 Term Award Detail

FALL 2021

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00
Worker Retraining Tuition	Grant	3,333.00	3,333.00
Term Totals		5,333.00	5,333.00

WINTER 2022 Term Award Detail

WINTER 2022

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00



< FA Award Acknowledgement
View Financial Aid

Financial Aid

Scheduled Disbursements

2021-2022 Financial Aid Year
FALL 2021

To view actual disbursements to your financial account, access [Account Inquiry](#).

Award Description	Category	Accepted Amount	Fee	Net Amount	Scheduled Disb Date
Opportunity Grant Tuition	Grant	2,000.00	0.00	2,000.00	09/10/2021
Worker Retraining Tuition	Grant	3,333.00	0.00	3,333.00	09/10/2021
Term Totals		5,333.00	0.00	5,333.00	

Currency used is US Dollar
If any accept amount is zero or if the scheduled disbursement date is blank, your award will not be disbursed. Please proceed to Award Acceptance page to accept or decline these awards.

[Account Inquiry](#)

[Return to Award Summary](#)

Navigation: Nav Bar > Navigator > Financial Aid > View Packaging Status Summary

Packaging Status Summary

[Redacted] ID [Redacted]

Aid Year 2022 2021-2022 Financial Aid Year Institution WA172

[EFC Status](#) [Official](#) [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [Calculation Override](#)

Counselor

Academic Career Undergraduate

Aid Processing Status

Aid Application Status

Review Status

INST Verification Status

Verification Flag

Verification Status

*Satisfactory Academic Progress [SAP Details](#)

Disbursement Hold

[Loan Counseling Status](#)

Scholarship Status

*Aid Packaging Method

Packaging Plan ID

Repackaging Plan ID

Aggregate Source

Aggregate Source Used

College Financing Plan Group

[Financial Aid Awarded](#) [Award Notification](#)

Self Service

Awarding Access

Inquiry Access

External Award Access

Limited Pell Grant Indicator



Financial Aid

Award Summary

2021-2022 Financial Aid Year

Select the term hyperlinks below to see more detailed information.

Currency used is US Dollar

Satisfactory Academic Progress

Financial Aid Summary

FALL 2021 Term Award Detail

FALL 2021

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	666.00	666.00
Worker Retraining Tuition	Grant	3,333.00	3,333.00
Term Totals		3,999.00	3,999.00

WINTER 2022 Term Award Detail

WINTER 2022

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
-------------------	----------	---------	----------

When you select **Deny Access** on the *View Packaging Status Summary* page, it removes the *Accept/Decline Awards* link for the student.

Navigation: Nav Bar > Navigator > Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options

Inquiry
Awarding
Loan
SAP
Disbursement

Institution WA172 Spokane Falls CC

Aid Year 2022

[Copy Self-Service Options](#)

Display Data

Allow Access

Award Detail

Remaining Need

Canceled Awards

Declined Awards

Award Notification

SAP

*View Data By Aid Year

*Summary Link Summary Page

*Need Methodology Federal

Alternate Text

*Summary Link Label Financial Aid Summary

*Academic Year Award Period Academic Year

*Non-Standard Award Period Summer Term

View Award Notification

SAP Link Label

Sort Order

*Term Ascending

*Award Ascending

[Save](#) [Return to Search](#) [Notify](#)

[Add](#) [Update/Display](#)

Inquiry | Awarding | Loan | SAP | Disbursement



< ctcLink Student Homepage
View Financial Aid

[Financial Aid](#)
Select Aid Year to View

Select the aid year you wish to view

Aid Year	Institution	Aid Year Description
2017	Spokane CC	2016-2017 Financial Aid Year
2022	Spokane Falls CC	No self-service access for this aid year.
2021	Spokane Falls CC	2020-2021 Financial Aid Year

Aid years listed indicate your access to eligibility information regarding your Financial Aid Application.

When you uncheck the **Allow Access** checkbox on the on the Self-Service Options page for that aid year, the link for the aid year disappears for students.

Q&A TIME





REVIEW ITEM-TYPES AND PACKAGING PLANS CONFIGURATIONS



Navigation: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types

Financial Aid Item Types

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

SetID =
 Aid Year =
 Item Type >=
 Description begins with
 Key Word begins with
 Key Word 2 begins with
 Key Word 3 begins with
 Item Type From >=
 Item Type To <=

Include History
 Correct History
 Case Sensitive

Search Results

View All First 1-100 of 161 Last

SetID	Aid Year	Item Type	Description	Key Word	Key Word 2	Key Word 3
WA172	2022	911000000000	Federal Pell Grant	(blank)	(blank)	(blank)
WA172	2022	911000000010	Additional Federal Pell Grant	(blank)	(blank)	(blank)
WA172	2022	911000000014	CARES II - Tuition & Fees Only	(blank)	(blank)	(blank)
WA172	2022	911000000015	CARES Act	(blank)	(blank)	(blank)
WA172	2022	911000000017	CARES II Not 1098T & Refund	(blank)	(blank)	(blank)



[FA Item Type 1](#) | [FA Item Type 2](#) | [FA Item Type 3](#) | [FA Item Type 4](#) | [FA Item Type 5](#) | [FA Item Type 6](#)

SetID WA172
Item Type 931000000000 Federal Work Study
Aid Year 2022 2021-2022 Financial Aid Year

FA Item Type Setup Find | View All First 1 of 1 Last

*Effective Date *Status

*Description Short Description

Financial Aid Type Source Federal ID

Aggregate Area Institution Reporting Cd

Comments

[FA Item Type 1](#) | [FA Item Type 2](#) | [FA Item Type 3](#) | [FA Item Type 4](#) | [FA Item Type 5](#) | [FA Item Type 6](#)



FA Item Type 1 | **FA Item Type 2** | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

SetID WA172
Item Type 931000000000 Federal Work Study
Aid Year 2022 2021-2022 Financial Aid Year

Awarding Rules Find | View All First **1 of 1** Last

Effective Date 01/01/1901	Status Active
Fed/Inst Affected Federal Only	
Meet Need/Cost Straight Need/Cost	
Packaging Methodology Federal Methodology	
Selection Criteria <input type="text"/>	

Rounding Rules

Rounding Option Round Even Dollar

Round Direction Round Nearest

Award Remainder Rule Last Disbursement - Dollars

Fee Remainder Rule

Truncate Fees

<input checked="" type="checkbox"/> Need Based	<input checked="" type="checkbox"/> Auto Package	
<input checked="" type="checkbox"/> Self Help Award	<input type="checkbox"/> Package Only Once	<input type="checkbox"/> Lock Award
<input type="checkbox"/> Equity Award	<input type="checkbox"/> Don't Repackage	<input type="checkbox"/> Disbursement Protection

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

Meet Need/Cost

Conditional: Indicates an award made without regard to budget or need if federal aid has not been awarded at the time of this award. However, if federal aid precedes this award, conditional awards behave like special need/cost awards.

Cost Only: The awarded amount affects only the unmet COA balance.

Need Only: The awarded amount affects only the unmet need balance.

No Effect: The awarded amount does not affect the unmet need or unmet COA balances. Ensure that you understand the results before using this option.

Special Need/Cost: The Packaging process first determines whether unmet need exists. The system always reduces unmet need first. Then the process compares the remaining unmet COA against the student's EFC and awards up to the lesser of the two. This is the preferred attribute for unsubsidized Stafford and PLUS loans. Special need/cost aid reduces both the unmet need and unmet COA balances.

Straight Need/Cost: The awarded amount affects both the unmet need and unmet COA balances



FA Item Type 1	FA Item Type 2	FA Item Type 3	FA Item Type 4	FA Item Type 5	FA Item Type 6
----------------	----------------	-----------------------	----------------	----------------	----------------

SetID WA172
Item Type 931000000000 Federal Work Study
Aid Year 2022 2021-2022 Financial Aid Year

Award Attributes Find | View All First 1 of 1 Last

Effective Date 01/01/1901 **Status:** Active
Pass Anticipated Aid No Anticipate **Anticip Aid Expiration Days** 30
Disbursement Method No **Auto Cancel Item Type** 930000000000

Signature Required
 Manual Authorization
 Include in Transcript

Print Letter Option Print
 Print as Award Item
 Print as Other Resource

Award Letter Print

Award Message WKST

Self Service Actions

Accept
 Reduce
 Decline

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6



FA Item Type 1
FA Item Type 2
FA Item Type 3
FA Item Type 4
FA Item Type 5
FA Item Type 6

SetID WA172
Item Type 931000000000 Federal Work Study
Aid Year 2022 2021-2022 Financial Aid Year

Award Limits by Term Category Find | View All First ◀ ▶ 1 of 1 Last

Effective Date 01/01/1901 **Status:** Active

*Term Category	*Minimum	*Maximum		
Regular Term ▼	1,000.00	2,500.00	+	-
Summer Term ▼	1,000.00	2,500.00	+	-

Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display
Include History
Correct History

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6



FA Item Type 1
FA Item Type 2
FA Item Type 3
FA Item Type 4
FA Item Type 5
FA Item Type 6

SetID WA172
Item Type 931000000000 Federal Work Study
Aid Year 2022 2021-2022 Financial Aid Year

Disbursement Rules Find | View All First 1 of 1 Last

Effective Date 01/01/1901 **Status:** Active

Missing Term Enrollment: Split evenly across valid term

Default Disbursement Splits Personalize | Find | First 1 of 1 Last

*Academic Institution	*Academic Career	*Disbursement Plan	*Split Code		
WA172	UGRD	09	AY	+	-

Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display
Include History
Correct History

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6



FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | **FA Item Type 6**

SetID WA172
Item Type 931000000000 Federal Work Study
Aid Year 2022 2021-2022 Financial Aid Year

Loan Program Find | View All First 1 of 1 Last

Effective Date 01/01/1901 **Status** Active

Loan Program **Loan Interest Attribute**

Loan Fees Personalize | Find | First 1 of 1 Last

*Loan Fee	Loan Fee Type	Loan Fee Rule	Loan Fee Option	Fee Percent	Flat Fee
1					

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6



Navigation: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Fiscal Item Types

Fiscal Item Types

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

SetID = ▾ WA172 🔍

Aid Year = ▾ 2022 🔍

Item Type >= ▾ 931000000000 🔍

Description begins with ▾ 🔍

Key Word begins with ▾ 🔍


Key Word 2 begins with ▾ 🔍

Key Word 3 begins with ▾ 🔍

Item Type From >= ▾ 🔍

Item Type To <= ▾ 🔍

Case Sensitive

Search Clear Basic Search  Save Search Criteria

Search Results

View All First 101-161 of 161 Last

SetID	Aid Year	Item Type	Description	Key Word	Key Word 2	Key Word 3
WA172	2022	930000000000	College Work Study	(blank)	(blank)	(blank)
WA172	2022	931000000000	Federal Work Study	(blank)	(blank)	(blank)
WA172	2022	931000000100	Federal Work Study Off Campus	(blank)	(blank)	(blank)
WA172	2022	932000000000	State Work Study	(blank)	(blank)	(blank)

Make sure to put money in each column for each item-type you are awarding. The system will not allow you to award/disburse an item-type once it meets the respective limits.

Assign Fiscal Limits		Fiscal Fund Status	Fiscal Fund Notes
SetID WA172			
Item Type	931000000000 Federal Work Study	Aid Year	2022 2021-2022 Financial Aid Year
	Offer	Accept	Disbursements
Budgeted	<input type="text" value="999,999.00"/>	<input type="text" value="999,999.00"/>	Budgeted <input type="text" value="999,999.00"/>
Gross	0.00	0.00	Paid 0.00
Reductions	0.00	0.00	Potential Payments 9,999,999.00
Net	0.00	0.00	
Available	999,999.00	999,999.00	
Count	0	0	
Highest	0.00	0.00	Audit Fields

Assign Fiscal Limits | Fiscal Fund Status | Fiscal Fund Notes



Navigation: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Disbursement ID Table

Disbursement ID Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Academic Institution =

Aid Year =

Academic Career begins with

Disbursement Plan begins with

Description begins with

Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Search Results

View All First 1-42 of 42 Last

Academic Institution	Aid Year	Academic Career	Disbursement Plan	Description
WA172	2022	UGRD	01	Fall-Winter-Spring
WA172	2022	UGRD	02	Fall-Winter
WA172	2022	UGRD	03	Fall Only
WA172	2022	UGRD	04	Fall-Spring
WA172	2022	UGRD	05	Winter-Spring
WA172	2022	UGRD	06	Winter Only
WA172	2022	UGRD	07	Spring Only
WA172	2022	UGRD	08	Summer Only
WA172	2022	UGRD	09	Summer-Fall-Winter-Spring
WA172	2022	UGRD	10	Summer-Fall-Winter

Disbursement ID

Institution WA172 Spokane Falls CC Aid Year 2022 2021-2022 Copy

Career UGRD Undergraduate Disbursement Plan 01 Fall-Winter-Spring

Find | View 1 | First 1-3 of 3 Last

*Disbursement ID 01 (Aid Year Sequence) + -

*Description Fall Disbursement 1

Short Description Fall Disb1

*Term 2217 FALL 2021 Award Period: Academic

*Disbursement Date 09/10/2021

Loan Request Dt 09/10/2021

*Disbursement ID 02 (Aid Year Sequence) + -

*Description Winter Disbursement 1

Short Description Wntr Disb1

*Term 2221 WINTER 2022 Award Period: Academic

*Disbursement Date 12/25/2021

Loan Request Dt 12/25/2021

*Disbursement ID 03 (Aid Year Sequence) + -

*Description Spring Disbursement 1

Short Description Sprg Disb1

*Term 2222

The date entered for Disbursement Date will be displayed to the student under the *View Scheduled Disbursement Dates* link.

Navigation: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan

Packaging Plan

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ **Search Criteria**

Academic Institution [= ▾] 🔍
 Aid Year [= ▾] 🔍
 Academic Career [begins with ▾] 🔍
 Packaging Plan ID [begins with ▾]
 Description [begins with ▾]

Include History
 Correct History
 Case Sensitive

Search Results

View All First ◀ 1-11 of 11 ▶ Last

Academic Institution	Aid Year	Academic Career	Packaging Plan ID	Description
WA172	2022	UGRD	FA-WI	Fall/Winter
WA172	2022	UGRD	FA-WI-SP	Fall/Winter/Spring
WA172	2022	UGRD	FALL ONLY	Fall
WA172	2022	UGRD	PELL_ONLY	Pell Only
WA172	2022	UGRD	SPRG ONLY	Spring Only
WA172	2022	UGRD	SU-FA	Summer/Fall
WA172	2022	UGRD	SU-FA-WI	Summer/Fall/Winter
WA172	2022	UGRD	SUFAWISP	Summer/Fall/Winter/Spring
WA172	2022	UGRD	SUMR ONLY	Summer Only
WA172	2022	UGRD	WI-SP	Winter/Spring
WA172	2022	UGRD	WINTR ONLY	Winter Only

Find an Existing Value | Add a New Value



Packaging Plan
EM Target
IM Target
Equity Rule
Packaging Limits
Packaging Rules 1
Packaging Rules 2

Academic Institution WA172 Spokane Falls CC

Academic Career UGRD Academic Career

Aid Year 2022

Plan ID FA-WI

Package Rule Find First 1 of 3 Last

Effective Date 02/20/2021 Status Active Processing Order 50 + -

Item Types Find | View All First 1 of 14 Last

Sequence Nbr % of Total Package Spending Limit Preferences + -

Gap

Item Type Federal Pell Grant

Related Item Group

Selection Criteria [Equation Detail](#)

Limited by

Minimum Constant Equation

Maximum Constant Equation

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution WA172 Spokane Falls CC **Aid Year** 2022
Academic Career UGRD Academic Career **Plan ID** FA-WI

Package Rule Find First 1 of 3 Last

Effective Date 02/20/2021 **Status** Active **Processing Order** 50

Item Types Find | View All First 5 of 14 Last

Sequence Nbr 60 **% of Total Package** 100.0 Spending Limit Preferences

Gap
 Item Type Wa State Need Grant-Waitlist
 Related Item Group

Selection Criteria Equation Detail

Limited by

Minimum Constant Equation
Maximum Constant Equation Equation Detail

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

WSAC eliminated the WCG Waitlist starting 2020-2021 aid year, but the CBS equation requires the WCG Waitlist Item-type be in the packaging plans that have CBS in them. DO NOT REMOVE.

IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | **Packaging Rules 2**

Academic Institution WA172 Spokane Falls CC Aid Year 2022
Academic Career UGRD Academic Career Plan ID FA-WI

Find First 1 of 3 Last

Effective Date 02/20/2021 Status: Active Processing Order 50

Item Type Defaults Find | View All First 1 of 14 Last

Sequence Nbr 10 Item Type 911000000000 Federal Pell Grant

Award Action Offer/Accept

Disbursement Plan

Use Item Type Default Disbt Plan 01 Fall-Winter-Spring
 Override Default

Split Code

Use Item Type Default Split Code F2 Fall-Winter
 Override Default

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

Make sure to open up buckets for future quarters!
Disbt Plan determines which buckets to open up.
Split Code determines which buckets to put the money in.

Student Aid Package | Need Summary | Term Summary

██████████ ID ██████████

Aid Year 2022 2021-2022 Financial Aid Year Institution WA172

Career UGRD Undergrad Package Status Packaging Completed **Validate**

Packaging Plan ID Retrieve Aggregate Source FA Installation Default **Post**

Repackaging Plan ID Repackage Award Period Both Academic & Non Std **Reset**

[Attributes](#) [Award Notification](#)

Award | Status |||

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	<input type="text"/>	UGRD	91100000000	Federal Pell Grant	4,330.00	4,330.00	02	XX <input type="text"/>	Disbursement +

Save | Return to Search | Previous in List | Next in List | Notify

Award Disbursement Detail

*Sequence 10 Item Type 91100000000 Net Award Amount \$4,330.00

Disbursement Plan 02 *Split Code XX Custom Split

Disbursement Distribution

Disbt ID	Term	Award Period	Level	Offered	Accepted	Net Disbursement Balance	Disbursed
01	2217	Academic	U2	2,165.00	2,165.00	2,165.00	0.00
02	2221	Academic	U2	2,165.00	2,165.00	2,165.00	0.00

Student Aid Package
Need Summary
Term Summary

[REDACTED]

Aid Year 2022 2021-2022 Financial Aid Year

ID **[REDACTED]**

Institution WA172

Career Undergrad

Package Status

Packaging Plan ID Retrieve

Aggregate Source

Repackaging Plan ID Repackage

Award Period

[Attributes](#)

[Award Notification](#)

II▶

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	<input type="button" value="B"/> <input type="text"/>	UGRD	911000000000	Federal Pell Grant	4,330.00	4,330.00	02	XX <input type="text"/>	Disbursement <input style="float: right;" type="button" value="+"/>

Only Fall and Winter buckets were opened to the student so you cannot award money for that item-type for Spring.
Disbursement Plan ID is locked.

Student Aid Package
Need Summary
Term Summary

[Redacted]

Aid Year 2022 2021-2022 Financial Aid Year

ID **[Redacted]**

Institution WA172

Career UGRD Undergrad

Packaging Plan ID

Repackaging Plan ID

[Attributes](#)

Package Status Packaging Completed

Aggregate Source FA Installation Default

Award Period Both Academic & Non Std

[Award Notification](#)

Award
Status

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	<input type="button" value="Search"/>	UGRD	91100000000	Federal Pell Grant	0.00	0.00	02 <input type="button" value="Search"/>	AY <input type="button" value="Search"/>	Disbursement <input type="button" value="Plus"/>

After you cancel the item-type, you can select a different Disbursement Plan ID.

IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution WA172 Spokane Falls CC Aid Year 2022
 Academic Career UGRD Academic Career Plan ID FA-WI

Package Rule Find First 1 of 3 Last

Effective Date 02/20/2021 Status Active Processing Order 50

Item Types Find | View All First 11 of 14 Last

Sequence Nbr 110 % of Total Package 100.0 Spending Limit Preferences

Gap
 Item Type 961000001110 **Subsidized Direct Ln 1-New Fee**
 Related Item Group
 Selection Criteria

Limited by

Minimum Constant Equation 100.00
 Maximum Constant Equation **CTCFASBASUB3** Equation Detail

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

Keep Loan Sequestration dates in mind when reviewing which SUB/UNSUB loan item-type to have in packaging plans.

First disbursement before October 1st → Non new-fee item-type

First disbursement October 1st and on → New fee item-type



IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | **Packaging Rules 2**

Academic Institution WA172 Spokane Falls CC Aid Year 2022
Academic Career UGRD Academic Career Plan ID FA-WI

Find First 1 of 3 Last

Effective Date 02/20/2021 Status: Active Processing Order 50

Item Type Defaults Find View All First 11 of 14 Last

Sequence Nbr 110 Item Type 961000001110 Subsidized Direct Ln 1-New Fee
Award Action Offer

Disbursement Plan

Use Item Type Default Disbt Plan 51 Ln Fall-Winter 30 Day
 Override Default

Split Code

Use Item Type Default Split Code 3B Ln Fall-Winter 30 Day
 Override Default

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

Packaging Plan | FM Target | IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | Packaging Rules 2

Make sure disbursement plans are correct.
The words “new fee” are not on certain loan disbursement plans because they don’t have to be switched out with loan sequestration.



Academic Institution WA172 Spokane Falls CC **Aid Year** 2022
Academic Career UGRD Academic Career **Plan ID** FA-WI

Package Rule Find First 1 of 3 Last

Effective Date 02/20/2021 **Status** Active **Processing Order** 50

Item Types Find | View All First 13 of 14 Last

Sequence Nbr 130 **% of Total Package** 100.0 Spending Limit Preferences

Gap
 Item Type 961000001100 **Subsidized Direct Loan 1**
 Related Item Group
Selection Criteria

Limited by

Minimum Constant Equation 100.00
Maximum Constant Equation CTCFASBASUB Equation Detail



IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | **Packaging Rules 2**

Academic Institution WA172 Spokane Falls CC **Aid Year** 2022
Academic Career UGRD Academic Career **Plan ID** FA-WI

Find First 1 of 3 Last

Effective Date 02/20/2021 **Status:** Active **Processing Order** 50

Item Type Defaults Find | View All First 13 of 14 Last

Sequence Nbr 130 **Item Type** 961000001100 Subsidized Direct Loan 1
Award Action Offer

Disbursement Plan

Use Item Type Default **Disbt Plan** 31 Ln Fall-Winter
 Override Default

Split Code

Use Item Type Default **Split Code** L2 Ln Fall-Winter
 Override Default

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

Q&A TIME



**IDENTIFY STUDENTS WHO ARE
READY TO PACKAGE/REVIEW**



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By Folder Name begins with FA AWARD PACKAGING

Search [Advanced Search](#)

Search Results

*Folder View -- All Folders --

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
CTC_FA_COUNSELOR_REVIEW	Ready for Counselor Review	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite
CTC_FA_SET_READY_REVIEW	Set students ready for review	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite
CTC_FA_SET_READY_TO_PACKAGE	Set stdts ready to pckge CEMLI	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite
CTC_FA_SUMR_ENR_READY_TO_PKG	Stdts fr summer enrollnt CEMLI	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite
QCS_FA_171_MASS_PACKAGE_SELECT	ISIR trans#<50 / SAP / SULA	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite
QCS_FA_171_READY_FOR_PACKAGING	Set stdts Ready for Packaging	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite
QCS_FA_APPLIED_INCOMPLETE	FA applied but incomplete app	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite
QCS_FA_APPLIED_NEED_REVIEW	FA applied needs review WA172	Public	FA AWARD PACKAGING	HTML	Excel	XML	Schedule	Lookup References	Favorite



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results


*Folder View

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
QCS_QUERY_DETAILS	Query Details	Public	QUERY ADMIN	HTML	Excel	XML	Schedule	Lookup References	Favorite
QCS_QUERY_DETAILS_BY_RECORD	Query Details	Public	QUERY ADMIN	HTML	Excel	XML	Schedule	Lookup References	Favorite



QCS_QUERY_DETAILS - Query Details

Query Name (wildcard %) 

[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

Row	Query Name	Qry Owner ID	Qry Owner Name	Qry Owner Email	Creation Dttm	Created-By ID	Created-By Name	Created-By Email	Folder	Qry Descr	Qry Definition
1	QCS_FA_APPLIED_INCOMPLETE				11/16/2017 2:41:20PM	101008054	Rachelle Russell	russell@sbctc.edu	FAAWARD PACKAGING	FA applied but incomplete app	890:russell@sbctc.edu 11/16/2017 Identifies students who have applied for Financial Aid but may not have a complete FA application. Displays numerous fields on the Packaging Status Summary page, SAP status, official EFC, and enrollment level from FA load on FA term for each term in the prompted aid year. Update 890:tmorrill@sbctc.edu 06/05/2018 Institution prompt changed to INSTITUTN_SCRTY table to enforce security.



COMMONLY USED FILE REVIEW QUERIES

- QCS_FA_APPLIED_INCOMPLETE
- QCS_FA_APPLIED_NEED_REVIEW
- QCS_FA_BASIC_ELIG_DATA_ALL
- QCS_FA_APPLIED_NO_FED_STAT_AID
- QCS_FA_READY_FOR_REVIEW_SELECT

QCS_FA_APPLIED_INCOMPLETE

- Student has to have Official EFC for prompted aid year
- Shows Packaging Status
- SAP Status
- Indicates whether there are any FINA checklists in Initiated status for the student
- Shows the date of the most recent completed checklist
- Enrollment for each quarter

QCS_FA_APPLIED_NEED_REVIEW

- Similar to QCS_FA_APPLIED_INCOMPLETE but has an additional prompt to enter File Review Checklist.
- Query will give the same fields QCS_FA_APPLIED_INCOMPLETE with the addition of File Review Checklist status, date and responsible ID.

QCS_FA_BASIC_ELIG_DATA_ALL

Report includes:

- ISIR data from most recent transaction (ISIR trans #, residency, high school information, Primary EFC, Pell eligibility, Selective Service Match, INS Match, SSN Match, SSA Citizenship status, SARC flag, verification type, dependency status and housing choice)
- SAP status
- Residency data from student records (status, effective term and tuition exception if any)
- High school info from External Education (EXT_CAREER = HS)
- Academic Plan
- WCG Eligibility data (ISIR trans #, MFI, award amount and message)
- And more...

QCS_FA_APPLIED_NO_FED_STAT_AID

Query for finding students who have applied for aid but have no federal (Pell, FSEOG, FWS, DL) or state (WCG, CBS, SWS) aid offered for the prompted term.

The query includes the following fields to help in processing aid first-come, first-served:

- Application Received Date
- CPS Processing Date
- Institution Processing Date
- And more...

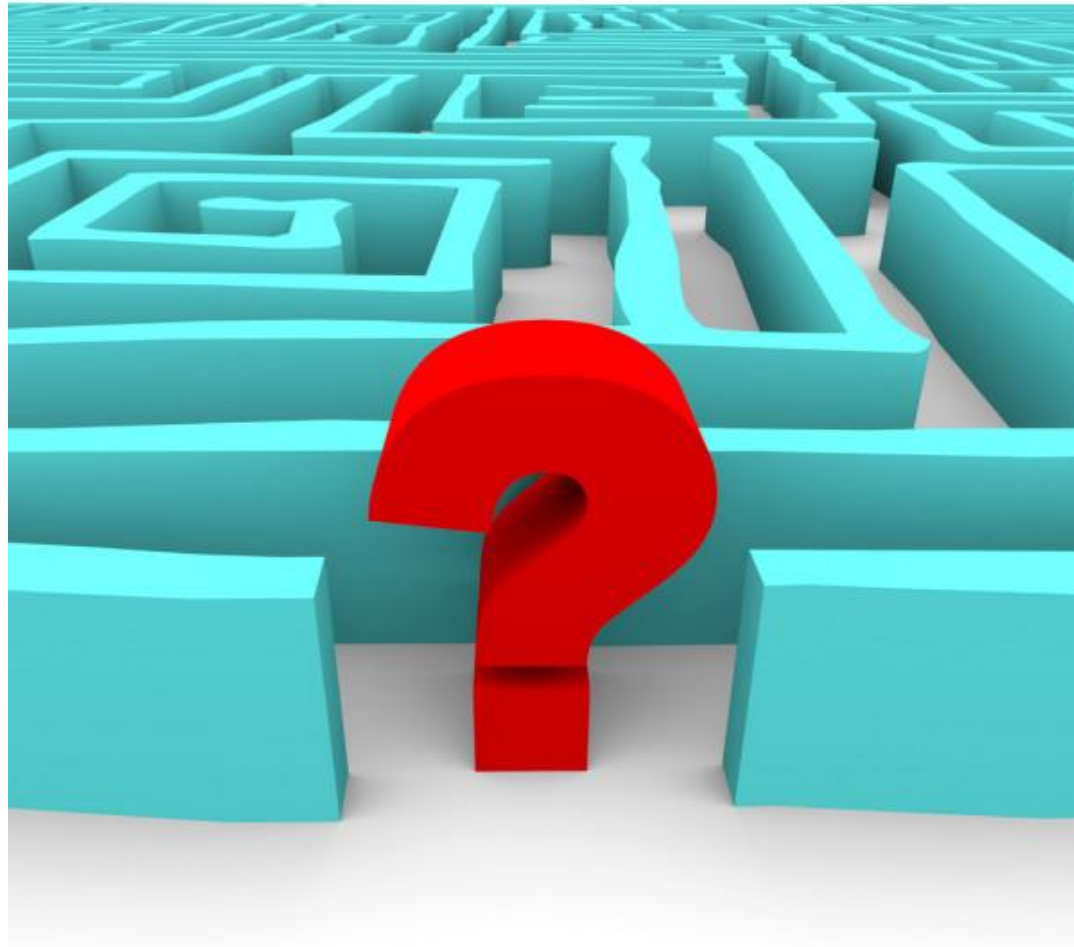
QCS_FA_READY_FOR_REVIEW_SELECT

Selects students who meet the following criteria:

- There are no FINA Requirements checklists in "Initiated" status
- Aid processing status = "Applied"
- SAP status is not "Not Meet"
- EFC status = "Official"
- Verification status = "Not Required" or "Complete"
- Has Active FA term
- Academic Plan is FA eligible (Short Description starts with "9")

Contains SCCPU_STDNT_BND & SCC_PS_FINA_BND so it can be tied to a population update process as well as population selection process for 3Cs.

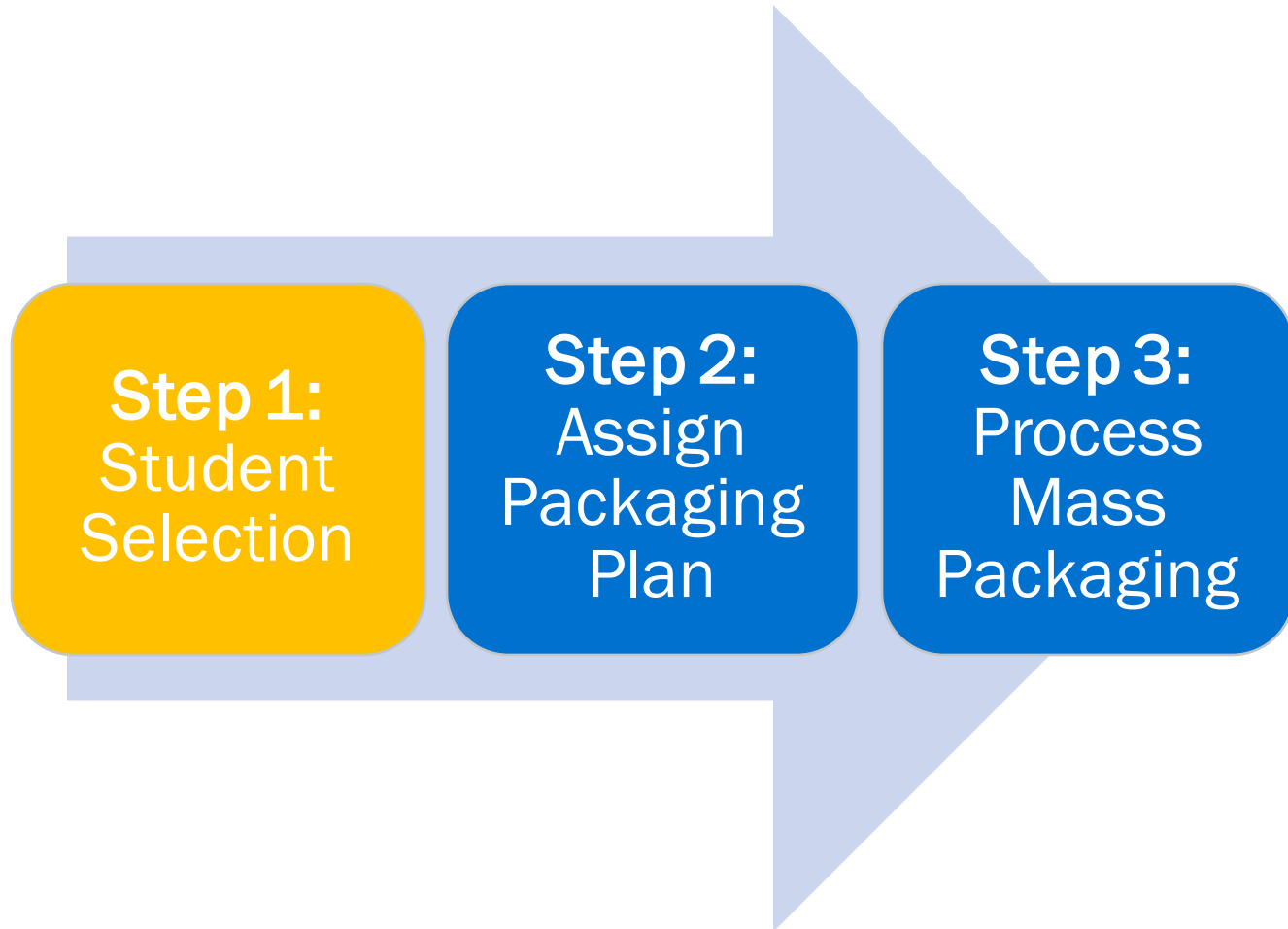
Q&A TIME



MASS PACKAGING

MASS PACKAGING

- 3-STEP PROCESS



SET READY FOR PACKAGING

- POPULATION SELECTION

Navigation: Set Up SACR > System Administration > Utilities > Population Update > Population Update Process

Population Selection Update

Run Control ID WA172_SET_READY_2_PKG_DE Report Manager Process Monitor [Run](#)

Select Record fields for update Find | View All First 1 of 1 Last

*Record (Table) Name + -

Institution Aid Year

Error Reporting Selection

Report Error Messages Do Not Report Messages Report All Messages

Population Selection

Selection Tool Edit Prompts
Query Name Launch Query Manager Preview Selection Results

Select Fields to Update Personalize | Find | View All | [Print] [Refresh] First 1 of 1 Last

Field Name	Field Value		
<input type="text" value="Aid Package Processing Statu"/>	<input type="text" value="Ready for Packaging"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

[▶ Select Attributes to Update](#)

CTC_FA_SET_READY_TO_PACKAGE selects students with an Official EFC, SAP is anything but 'Not Meets' or 'Undetermined,' no FINA Requirements List checklists in 'Initiated' status, Aid Package Processing Status is 'Applied,' Review Status is 'Completed,' and Verification Status is not required or completed

MASS PACKAGING

- STUDENT SELECTION & REVIEW

Navigation: Financial Aid > Awards > Mass Packaging > Select Students

Mass Packaging Select

Run Control ID WA172_MASS_PACK_EY_DE Report Manager Process Monitor

Process Instance:52586239

Population Selection

Selection Tool: Edit Prompts

Query Name: Launch Query Manager Preview Selection Results

Parameters

*Institution: Spokane Falls CC

*Aid Year: 2021-2022 Financial Aid Year

- **CTC_FA_MASS_PACKAGE_SELECT_01** selects students by CPS Process Date, or Current Date, SAP is Meets, does not have F04
- **CTC_FA_MASS_PACKAGE_SELECT_02** selects students by last completed FINA Requirements List checklist, SAP is Meets, does not have F04
- **CTC_FA_MASS_PACKAGE_SELECT_03** – selects students by CPS Process Date, or Current Date with a SAP Status of anything but “N”

MASS PACKAGING CONT'D

- STUDENT SELECTION AND REVIEW

Navigation: Financial Aid > Awards > Mass Packaging > View Results by Students

Mass Packaging by Students

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

Academic Institution

Aid Year

Selection Definition

Mass Packaging by Students

Academic Institution WA172 Spokane Falls CC

Aid Year 2022 2021-2022 Financial Aid Year

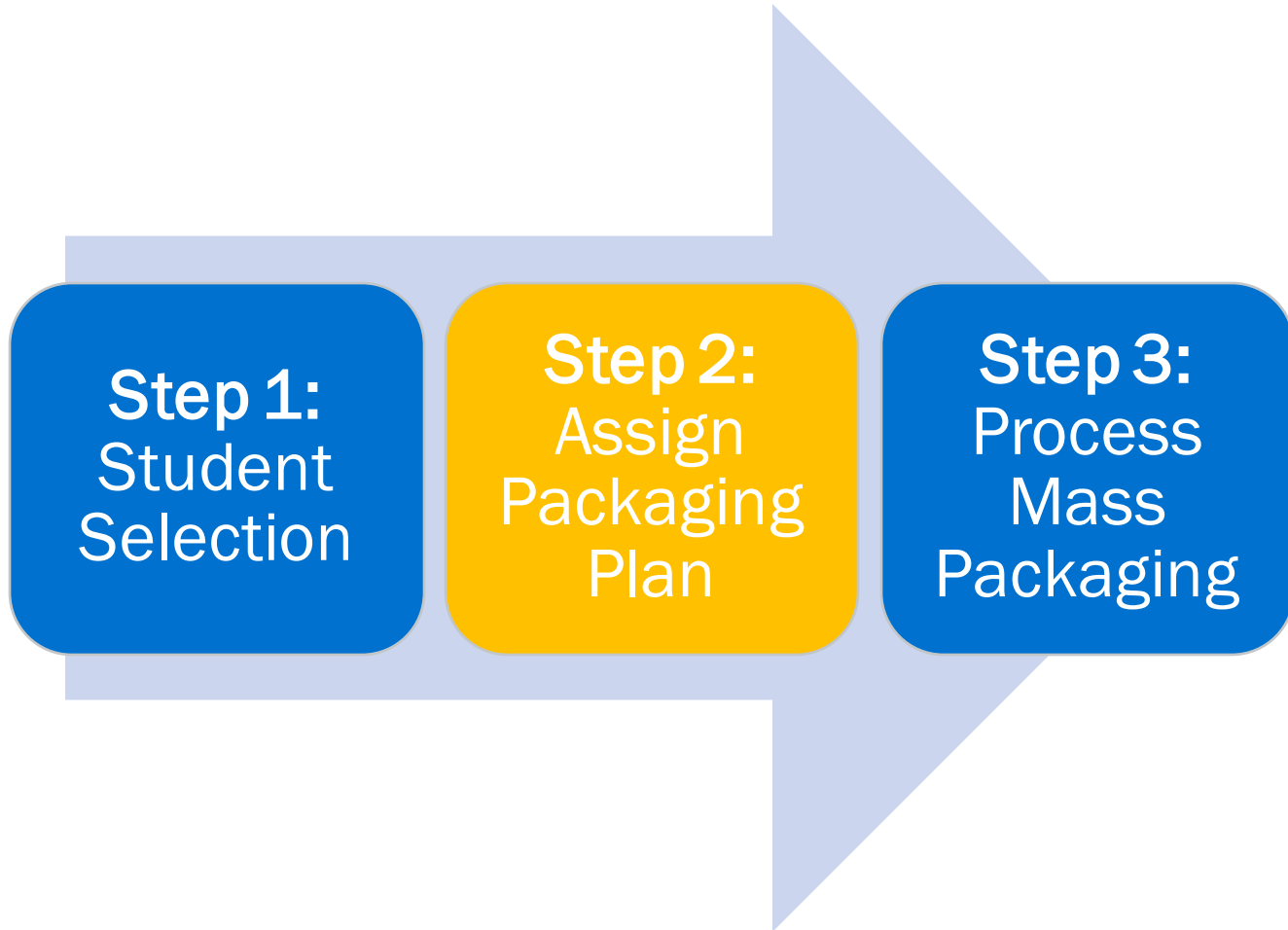
Selection Definition QUERY: CTC_FA_MASS_PACKAGE_SELECT_03

Personalize | Find | View 100 | First 1-100 of 268 Last

ID	Name	Career	*Process Status
		UGRD Undergraduate	Valid for Packaging
		UGRD Undergraduate	Valid for Packaging
		UGRD Undergraduate	Valid for Packaging
		UGRD Undergraduate	Valid for Packaging
		UGRD Undergraduate	Valid for Packaging

MASS PACKAGING CONT'D

- ASSIGN AND REVIEW PACK PLAN RESULTS



MASS PACKAGING CONT'D

- ASSIGN AND REVIEW PACK PLAN RESULTS

Navigation: Financial Aid > Awards > Mass Packaging > Assign Plans

Mass Packaging Assign

Run Control ID WA172_MASS_PACK_EY_DE Report Manager Process Monitor

Report Request Parameters

Institution Spokane Falls CC

Aid Year 2021-2022 Financial Aid Year

*Selection Definition

Packaging Plan Parameters Find First 1-7 of 7 Last

*Career	*Plan ID	*Sort Field	<input checked="" type="radio"/> Asc	<input type="radio"/> Desc	
<input type="text" value="UGRD"/>	<input type="text" value="SUFAWISP"/>	<input type="text" value="TRANS_PROCESS_DT"/>	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="text" value="UGRD"/>	<input type="text" value="SU-FA-WI"/>	<input type="text" value="TRANS_PROCESS_DT"/>	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="text" value="UGRD"/>	<input type="text" value="SU-FA"/>	<input type="text" value="TRANS_PROCESS_DT"/>	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="text" value="UGRD"/>	<input type="text" value="SUMR ONLY"/>	<input type="text" value="TRANS_PROCESS_DT"/>	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="text" value="UGRD"/>	<input type="text" value="FA-WI-SP"/>	<input type="text" value="TRANS_PROCESS_DT"/>	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="text" value="UGRD"/>	<input type="text" value="FA-WI"/>	<input type="text" value="TRANS_PROCESS_DT"/>	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="text" value="UGRD"/>	<input type="text" value="FALL ONLY"/>	<input type="text" value="TRANS_PROCESS_DT"/>	<input checked="" type="radio"/>	<input type="radio"/>	

MASS PACKAGING CONT'D




- ASSIGN AND REVIEW PACK PLAN RESULTS

Mass Packaging Plans by Query

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Academic Institution **begins with** WA172 
Aid Year **begins with** 2022 
Selection Definition **begins with** QUERY: CTC_FA_MASS_ 

Search

Clear

Basic Search 

Save Search Criteria

Navigation: Financial Aid > Awards > Mass Packaging > View Results by Query

Mass Packaging Plans Assigned

Academic Institution WA172 Spokane Falls CC
Aid Year 2022 2021-2022 Financial Aid Year
Selection Definition QUERY: CTC_FA_MASS_PACKAGE_SELECT_03

Packaging Plan Details

Find First 1 of 1 Last

Packaging Plan ID FA-WI-SP Fall/Winter/Spring **Academic Career** UGRD
Sort Packaging by TRANS_PROCESS_DT Ascending **Plan Order** 20

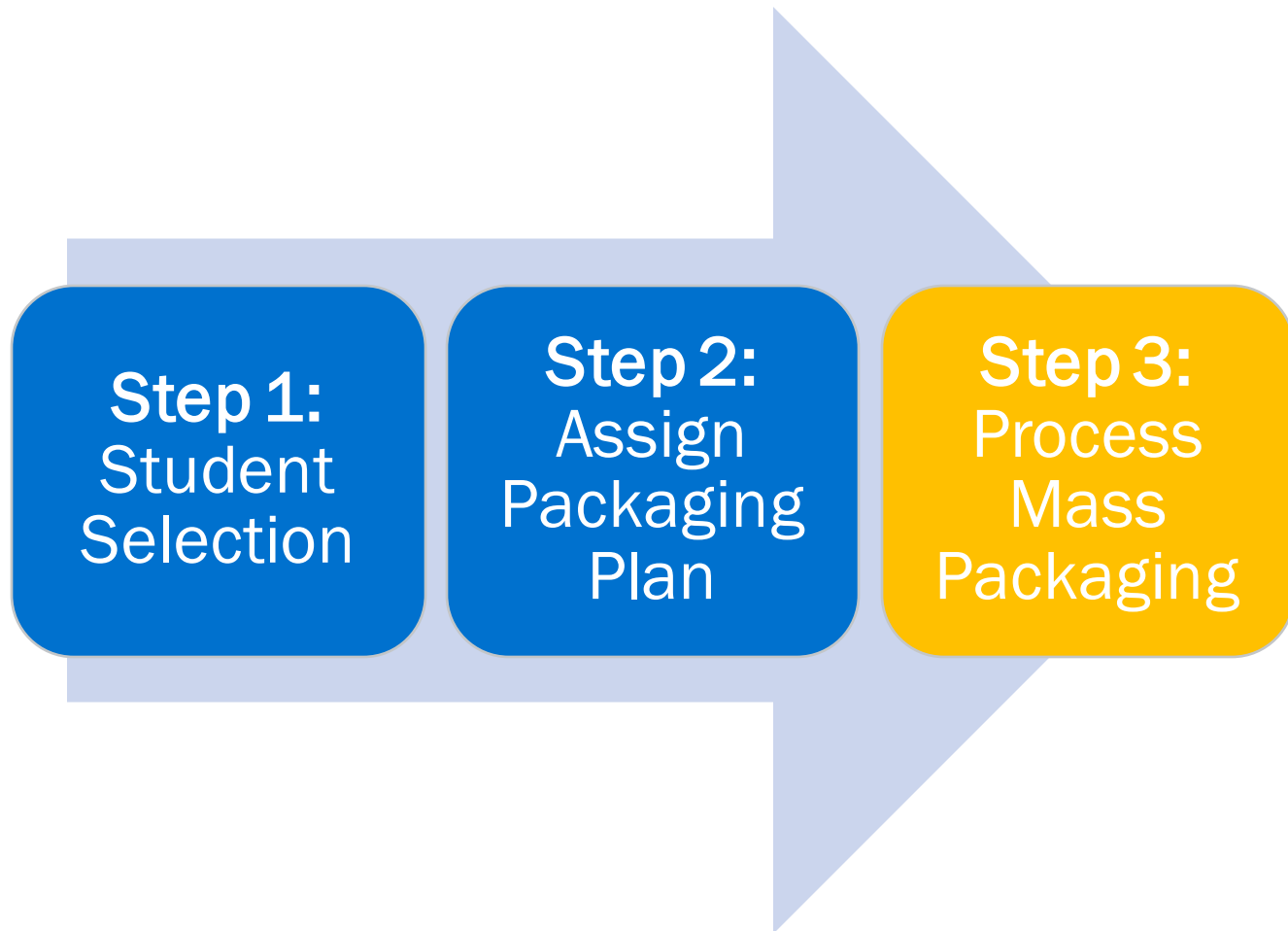
Details

Find | View 100 First 1-6 of 268 Last

*ID	Name	TRANS_PROCESS_DT	
		2020-10-13	Remove
		2020-10-13	Remove
		2021-02-04	Remove
		2020-11-16	Remove
		2020-10-05	Remove
		2021-04-09	Remove

MASS PACKAGING CONT'D

- PROCESS AWARDS FROM ASSIGNED PLANS



MASS PACKAGING CONT'D

- PROCESS AWARDS FROM ASSIGNED PLANS

Navigation: Financial Aid > Awards > Mass Packaging > Process Mass Packaging

Mass Packaging Process

Run Control ID WA172_MASS_PACK_EY_DE Report Manager Process Monitor Run

Report Request Parameters

*Institution Spokane Falls CC

*Aid Year 2021-2022 Financial Aid Year

*Selection Definition

Methodology

Batch Packaging Mode

Live

Simulation

You may want to run mass packaging in Simulation mode before Live mode to review how aid packages for the selected students.

After running mass package in Live mode, it is best practice to review each student before sending out award communications. You may need to prorate loans, resolve over-awards, etc.



Student Aid Package
Need Summary
Term Summary

Aid Year 2022 2021-2022 Financial Aid Year

ID [REDACTED] ★

Institution WA172 📄 📧

Career Undergrad

Packaging Plan ID Retrieve

Repackaging Plan ID Repackage

Attributes

Package Status Validate

Aggregate Source Post

Award Period Reset

Award Notification

Award

Status

▶▶

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	<input type="text" value="🔍"/>	UGRD	911000000000	Federal Pell Grant	6,495.00	6,495.00	01	XX <input type="text" value="🔍"/>	Disbursement +
20	<input type="text" value="🔍"/>	UGRD	911000000100	Supplemental Educ Opp Grant	1,200.00	1,200.00	01	AY <input type="text" value="🔍"/>	Disbursement +
30	<input type="text" value="🔍"/>	UGRD	912000000000	Washington College Grant	6,763.00	6,763.00	01	AY <input type="text" value="🔍"/>	Disbursement +
40	<input type="text" value="🔍"/>	UGRD	931000000000	Federal Work Study	5,400.00	0.00	01	AY <input type="text" value="🔍"/>	Disbursement +
50	<input type="text" value="🔍"/>	UGRD	961000001100	Subsidized Direct Loan 1	1,442.00	0.00	30	L1 <input type="text" value="🔍"/>	Disbursement +

Save
Return to Search
Notify

Grad 2217, proration needed, MP does not prorate.



Student Aid Package
Need Summary
Term Summary

[Redacted]

Aid Year 2022 2021-2022 Financial Aid Year

ID **[Redacted]**

Institution WA172

Career Undergrad

Packaging Plan ID Retrieve

Repackaging Plan ID Repackage

Attributes

Package Status

Aggregate Source

Award Period

Award Notification

Validate

Post

Reset

Award

Status

||>

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	<input type="text" value="🔍"/>	UGRD	91200000300	Opportunity Grant Tuition	6,000.00	6,000.00	09	U4 <input type="text" value="🔍"/>	Disbursement +
20	<input type="text" value="🔍"/>	UGRD	91200000500	Worker Retraining Tuition	10,000.00	10,000.00	09	AY <input type="text" value="🔍"/>	Disbursement +
30	<input type="text" value="🔍"/>	UGRD	91100000000	Federal Pell Grant	6,495.00	6,495.00	01	New via MP XX <input type="text" value="🔍"/>	Disbursement +

Save

Return to Search

Notify

Had prior awards, MP will add Pell, but will ignore "no remaining need" and award!



Student Aid Package
Need Summary
Term Summary

[Redacted]

ID [Redacted]
 Institution WA172

Aid Year 2022 2021-2022 Financial Aid Year

Need Summary by Award Period

 | << < > >> 1 of 2

Award Period	Academic		EFC Status	Official	
Federal Year COA	19,137.00	Institutional Year COA	19,137.00	Pell Year COA	19,137.00
Prorated EFC	0	Institutional EFC	0	Alternate Pell COA	4,683.00
Federal Need	19,137.00	Institutional Need	19,137.00	Less than Half Time Pell COA	19,137.00
Educational Resources	0	Educational Resources	0		
Federal Need Based Aid	22,495.00	Institutional Need Based Aid	0.00		
Special Need/Cost Aid (FED)	0.00	Special Need/Cost Aid (Inst)	0.00		
Total Federal Aid	22,495.00	Total Institutional Aid	0.00		
Federal Overaward	3,358.00	Institutional Unmet Need	19,137.00		
Federal COA Overaward	3,358.00	Unmet COA (INSTL)	19,137.00		

Save
Return to Search
Notify

Student is now over-awarded!

ONLINE PACKAGING

ONLINE PACKAGING

• RETRIEVE PACK PLAN ID

Navigation: Nav Bar > Navigator > Financial Aid > Awards > Award Processing > Assign Awards to a Student

Student Aid Package | Need Summary | Term Summary

██████████ ID ██████████

Aid Year 2022 2021-2022 Financial Aid Year Institution WA172

Career UGRD Undergrad Package Status Applied

Packaging Plan ID **Retrieve** Aggregate Source FA Installation Default

Repackaging Plan ID Repackage Award Period Both Academic & Non Std

[Attributes](#) [Award Notification](#)

Award | Status | Filter

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
<input type="text"/>	<input type="text"/>	UGRD	<input type="text"/>		0.00	0.00	<input type="text"/>	<input type="text"/>	+

Save | Return to Search | Previous in List | Next in List | Notify

Click **Retrieve** and the system will select the packaging plan and award the student like mass packaging would.

ONLINE PACKAGING

- REVIEW AID THEN CLICK VALIDATE

Student Aid Package | Need Summary | Term Summary

Aid Year: 2022 | 2021-2022 Financial Aid Year

ID: [Redacted] | Institution: WA172

Career: UGRD (Undergrad) | Package Status: Applied

Packaging Plan ID: FA-WI-SP | Retrieve | Aggregate Source: FA Installation Default

Repackaging Plan ID: [Empty] | Repackage | Award Period: Both Academic & Non Std

Validate | Post | Reset

Attributes | Award Notification

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code			
10	Q	UGRD	91100000000	Federal Pell Grant	6,495.00	6,495.00	01	XX Q	Disbursement		+
20	Q	UGRD	91100000100	Supplemental Educ Opp Grant	1,200.00	1,200.00	01	AY Q	Disbursement		+
30	X Q	UGRD	91100000100	Supplemental Educ Opp Grant	0.00	0.00		Q	Disbursement	Message	+
40	Q	UGRD	91200000000	Washington College Grant	4,219.00	4,219.00	01	AY Q	Disbursement		+
50	X Q	UGRD	91200000100	Wa State Need Grant-Waitlist	0.00	0.00		Q	Disbursement	Message	+
60	X Q	UGRD	91200000200	College Bound Scholarship	0.00	0.00		Q	Disbursement	Message	+
70	X Q	UGRD	91200000200	College Bound Scholarship	0.00	0.00		Q	Disbursement	Message	+
80	Q	UGRD	91300000100	Need Based Tuition Waiver	1,050.00	1,050.00	01	AY Q	Disbursement		+
90	X Q	UGRD	93200000000	State Work Study	0.00	0.00		Q	Disbursement	Message	+

Tip! Before validating, you can click on the *Message* links next to an item-type that has an X on it to see why the student was not awarded that item-type.

ONLINE PACKAGING

- REVIEW AID THEN CLICK VALIDATE

Student Aid Package | Need Summary | Term Summary

██████████ ID ██████████
Aid Year 2022 2021-2022 Financial Aid Year Institution WA172

Career UGRD Undergrad Package Status Packaging Completed
Packaging Plan ID FA-WI-SP Retrieve Aggregate Source FA Installation Default
Repackaging Plan ID Repackage Award Period Both Academic & Non Std

Attributes Award Notification

Validate
Post
Reset

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code		
10	🔍	UGRD	911000000000	Federal Pell Grant	6,495.00	6,495.00	01	XX 🔍	Disbursement	+
20	🔍	UGRD	911000001100	Supplemental Educ Opp Grant	1,200.00	1,200.00	01	AY 🔍	Disbursement	+
40	🔍	UGRD	912000000000	Washington College Grant	4,219.00	4,219.00	01	AY 🔍	Disbursement	+
80	🔍	UGRD	913000000100	Need Based Tuition Waiver	1,050.00	1,050.00	01	AY 🔍	Disbursement	+
100	🔍	UGRD	931000000000	Federal Work Study	5,400.00	0.00	01	AY 🔍	Disbursement	+
130	🔍	UGRD	961000001100	Subsidized Direct Loan 1	773.00	0.00	30	L1 🔍	Disbursement	+

Save | Return to Search | Previous in List | Next in List | Notify

After clicking **Post**, make sure to click **Save**.



Let's go back to the student who had other awards already offered to them.

Student Aid Package
Need Summary
Term Summary

[Redacted]

Aid Year 2022 2021-2022 Financial Aid Year

ID **[Redacted]**

Institution WA172

Career Undergrad

Packaging Plan ID [Retrieve](#)

Repackaging Plan ID [Repackage](#)

Attributes

Package Status

Aggregate Source

Award Period

[Validate](#)

[Post](#)

[Reset](#)

Award Notification

Award
Status
||>

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	<input type="text" value="Q"/>	UGRD	91200000300	Opportunity Grant Tuition	6,000.00	6,000.00	09	AY <input type="text" value="Q"/>	Disbursement +
20	<input type="text" value="Q"/>	UGRD	91200000500	Worker Retraining Tuition	10,000.00	10,000.00	09	AY <input type="text" value="Q"/>	Disbursement +

Click **Retrieve** and the system will select the packaging plan and award the student like mass packaging would.

Tip! Click on the *Need Summary* tab before validating awards to see if any aid needs to be adjusted, or the order of aid needs to be moved around.

Student Aid Package

Need Summary

Term Summary

██████████

Aid Year 2022 2021-2022 Financial Aid Year

ID **██████████**

Institution WA172

Career Undergrad

Packaging Plan ID **Retrieve**

Repackaging Plan ID **Repackage**

Attributes

Package Status

Aggregate Source

Award Period

Validate

Post

Reset

Award Notification

Award

Status

||>

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code		
10	<input type="text" value="Q"/>	UGRD	91200000300	Opportunity Grant Tuition	6,000.00	6,000.00	09	AY <input type="text" value="Q"/>	Disbursement	+
20	<input type="text" value="Q"/>	UGRD	91200000500	Worker Retraining Tuition	10,000.00	10,000.00	09	AY <input type="text" value="Q"/>	Disbursement	+
30	<input type="text" value="Q"/>	UGRD	91100000000	Federal Pell Grant	6,495.00	6,495.00	01	XX <input type="text" value="Q"/>	Disbursement	+
40	X <input type="text" value="Q"/>	UGRD	91100000100	Supplemental Educ Opp Grant	0.00	0.00	01	AY <input type="text" value="Q"/>	Disbursement	Message +
50	X <input type="text" value="Q"/>	UGRD	91100000100	Supplemental Educ Opp Grant	0.00	0.00		<input type="text" value="Q"/>	Disbursement	Message +



Student Aid Package		Need Summary		Term Summary	
[Redacted]		Aid Year 2022 2021-2022 Financial Aid Year		ID [Redacted]	
				Institution WA172	
Need Summary by Award Period					
Award Period Academic			EFC Status Official		
Federal Year COA	19,137.00	Institutional Year COA	19,137.00	Pell Year COA	19,137.00
Prorated EFC	0	Institutional EFC	0	Alternate Pell COA	4,683.00
Federal Need	19,137.00	Institutional Need	19,137.00	Less than Half Time Pell COA	19,137.00
Educational Resources	0	Educational Resources	0		
Federal Need Based Aid	22,495.00	Institutional Need Based Aid	0.00		
Special Need/Cost Aid (FED)	0.00	Special Need/Cost Aid (Inst)	0.00		
Total Federal Aid	22,495.00	Total Institutional Aid	0.00		
Federal Overaward	3,358.00	Institutional Unmet Need	19,137.00		
Federal COA Overaward	3,358.00	Unmet COA (INSTL)	19,137.00		



If Pell should be awarded and the other aid should be adjusted, move the sequence number accordingly then click **Validate**.

Student Aid Package

Need Summary

Term Summary

[Redacted]

Aid Year 2022 2021-2022 Financial Aid Year

ID **[Redacted]**

Institution WA172

Career Undergrad

Packaging Plan ID Retrieve

Repackaging Plan ID Repackage

Attributes

Package Status

Aggregate Source

Award Period

Validate

Post

Reset

Award Notification

Award

Status

||>

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	<input type="text" value="Q"/>	UGRD	91200000300	Opportunity Grant Tuition	6,000.00	6,000.00	09	AY <input type="text" value="Q"/>	Disbursement +
20	<input type="text" value="Q"/>	UGRD	91200000500	Worker Retraining Tuition	10,000.00	10,000.00	09	AY <input type="text" value="Q"/>	Disbursement +
5	<input type="text" value="Q"/>	UGRD	91100000000	Federal Pell Grant	6,495.00	6,495.00	01	XX <input type="text" value="Q"/>	Disbursement +
40	X <input type="text" value="Q"/>	UGRD	91100000100	Supplemental Educ Opp Grant	0.00	0.00	01	AY <input type="text" value="Q"/>	Disbursement Message +



Over-award has been resolved by reducing the item-type at the bottom of the list,

Student Aid Package

Need Summary

Term Summary

[Redacted]

Aid Year 2022 2021-2022 Financial Aid Year

Career Undergrad

Packaging Plan ID Retrieve

Repackaging Plan ID Repackage

Attributes

ID **[Redacted]**

Institution WA172

Package Status

Aggregate Source

Award Period

Award Notification

✖ ★

📄 📅 💬

Validate

Post

Reset

Award

Status

||▶

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
5	<input type="text" value="🔍"/>	UGRD	911000000000	Federal Pell Grant	6,495.00	6,495.00	01	XX <input type="text" value="🔍"/>	Disbursement +
10	<input type="text" value="🔍"/>	UGRD	912000000300	Opportunity Grant Tuition	6,000.00	6,000.00	09	AY <input type="text" value="🔍"/>	Disbursement +
20	<input type="text" value="🔍"/>	UGRD	912000000500	Worker Retraining Tuition	6,642.00	6,642.00	09	AY <input type="text" value="🔍"/>	Disbursement Message +

Q&A TIME





OUTCOMES

After this worksession, you have an understanding of:

- FA Self Service
- Item-types and packaging plans configurations
- Reports to identify students who are ready to review/package
- Mass packaging versus online packaging

CONGRATULATIONS!

- You are now equipped with the knowledge to begin packaging your students!
- Please refer to the ctcLink Reference Center for additional resource materials on today's topics
- Thank you for your participation today!