PACKAGING - PREPARING FOR PACKAGING

FA ERP Support

April 2021

COMMUNITY AND TECHNICAL COLLEGES
Washington State Board

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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

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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*

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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

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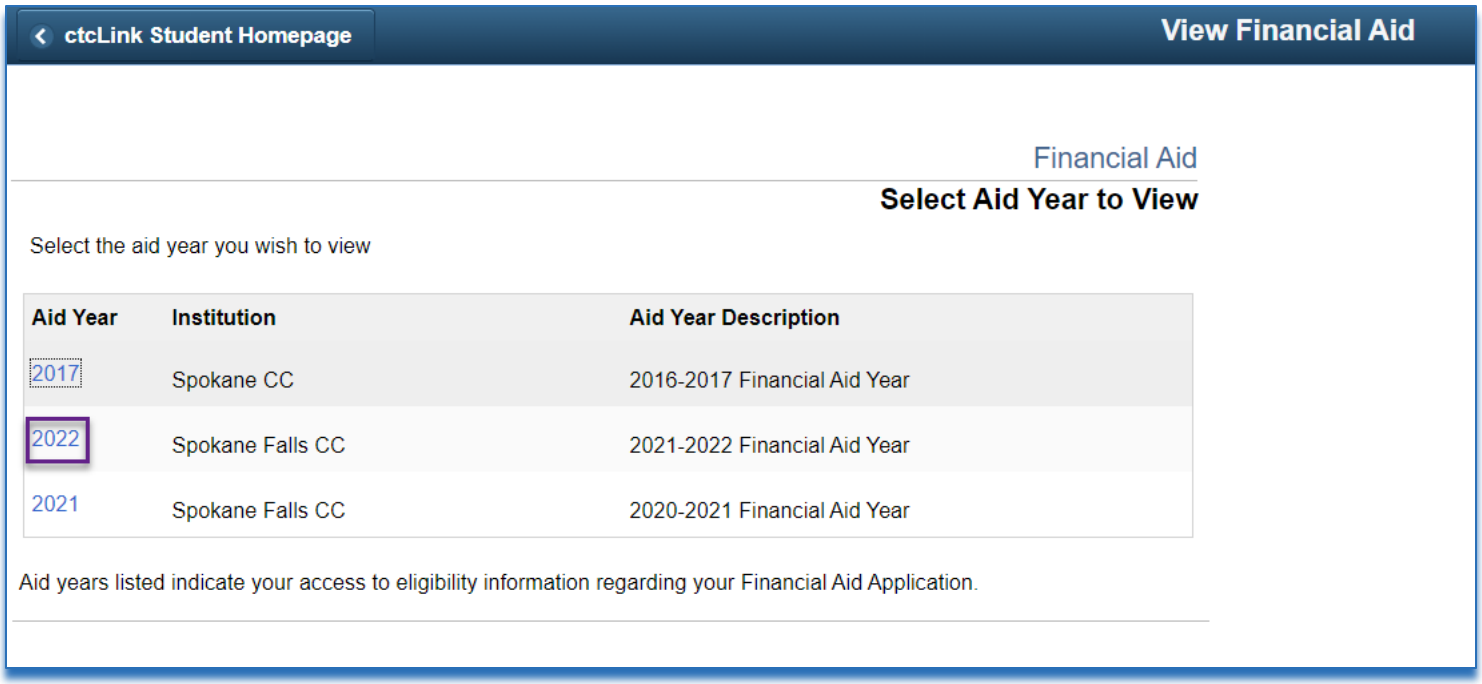
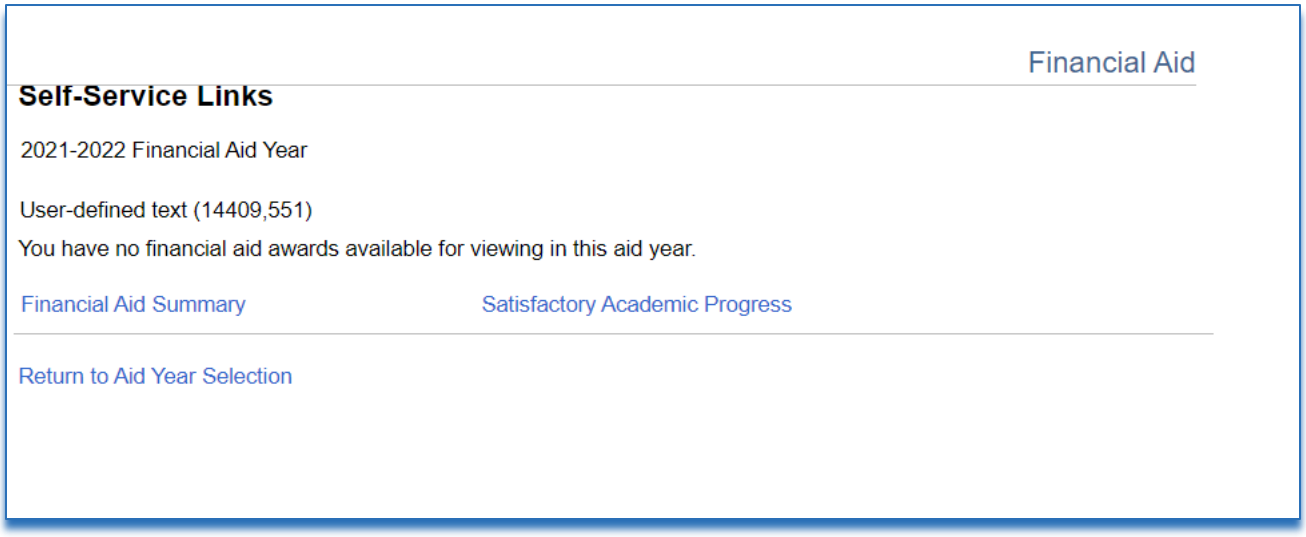


When you allow FA Self Service access, students are able to click the link to the aid year.

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*.



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

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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

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

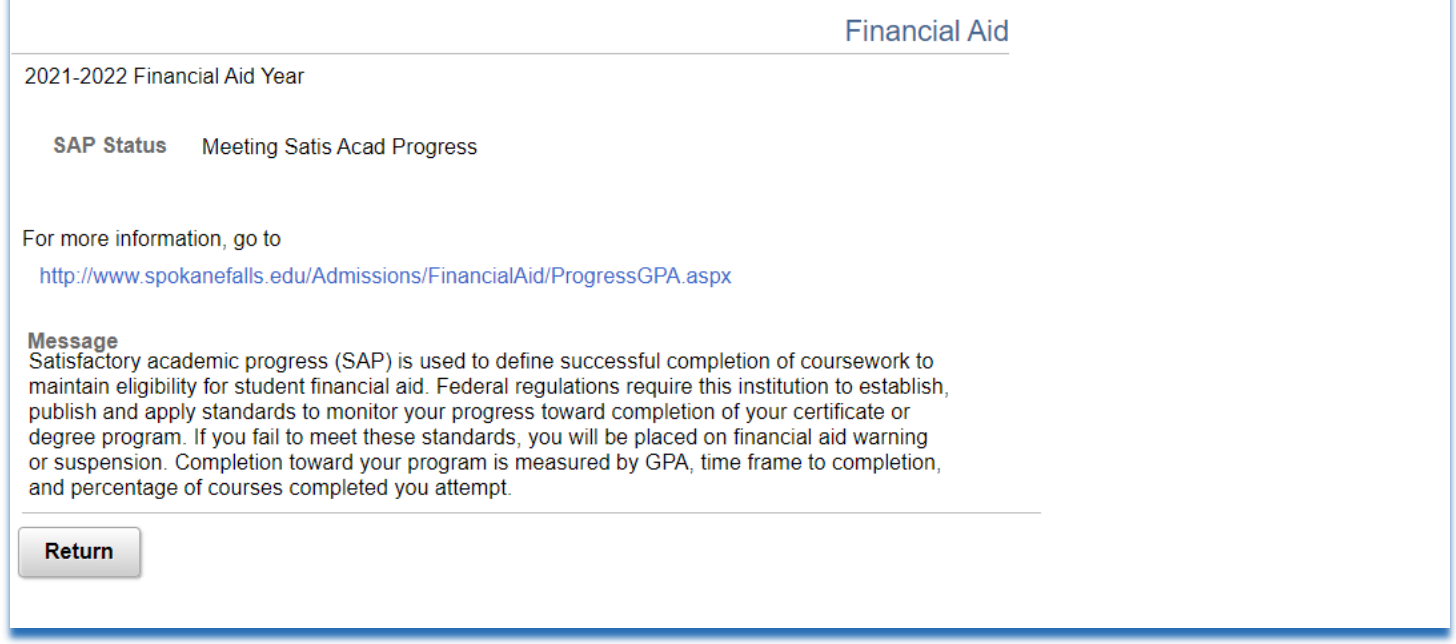
FALL 2021 View Scheduled Disbursement Dates

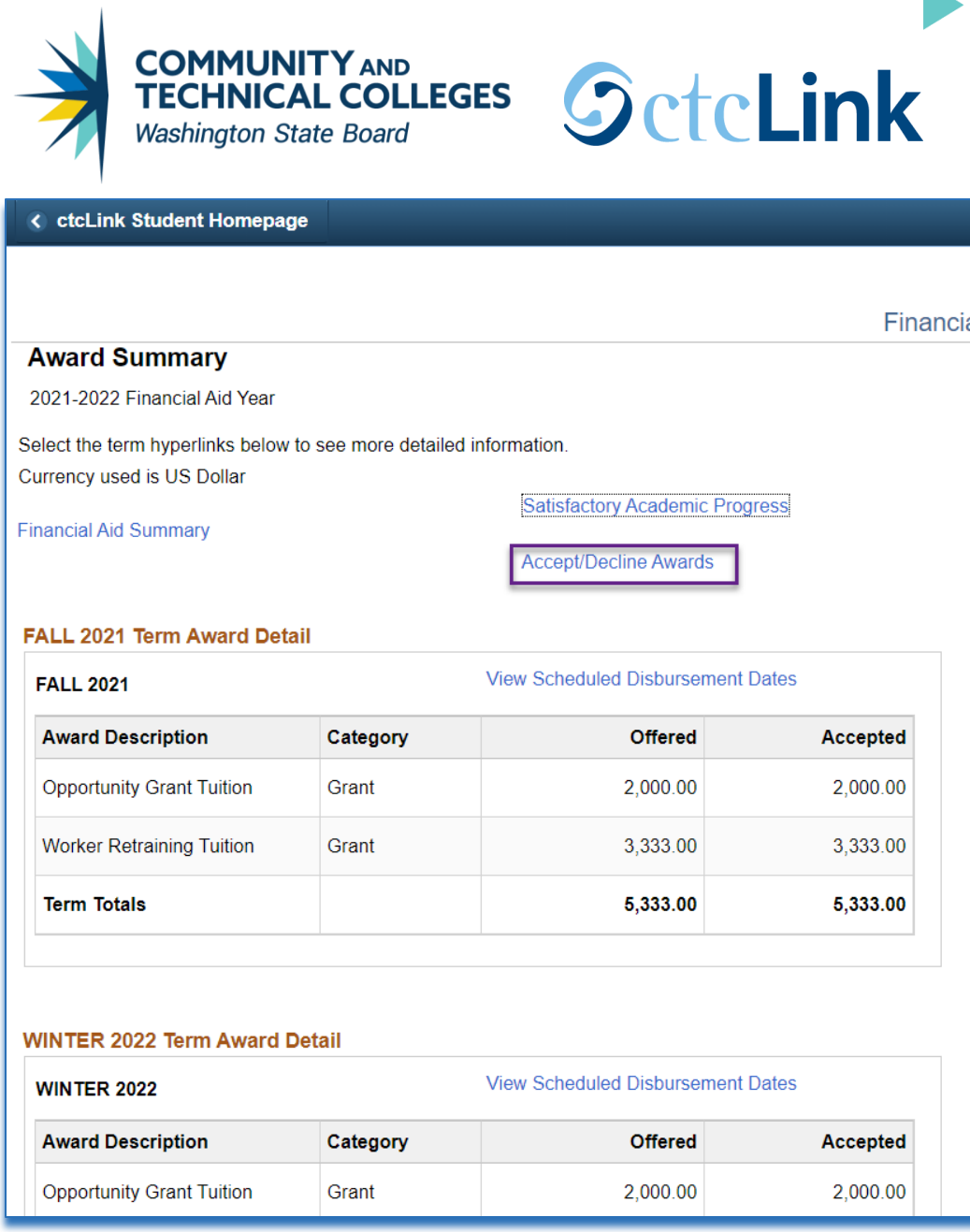
Award Description	Category	Offered	Accepted
Opportunity Grant Tuition	Grant	2,000.00	2,000.00
Worker Retraining Tuition	Grant	3,333.00	3,333.00
Term Totals		**5,333.00**	**5,333.00**

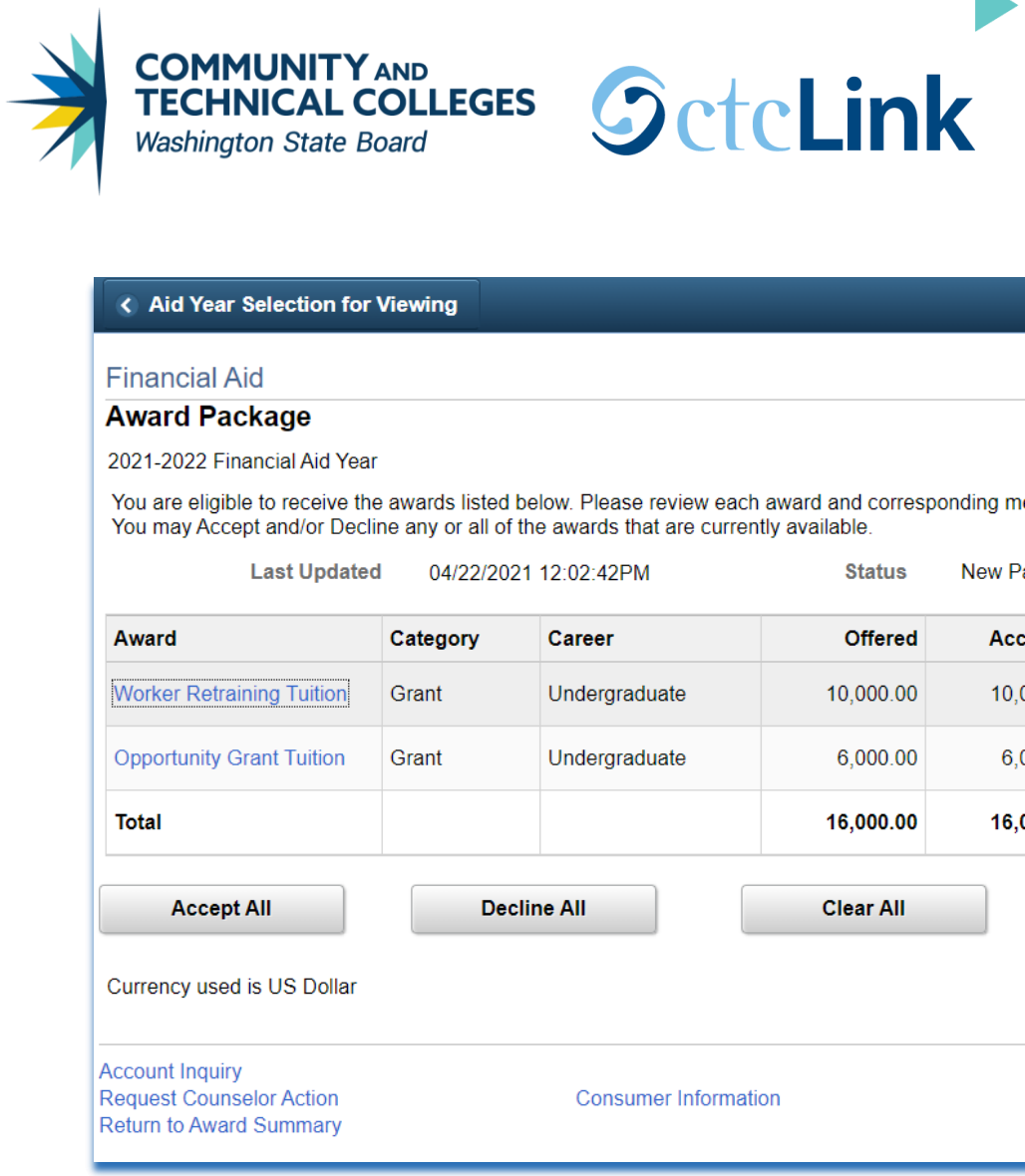
WINTER 2022 Term Award Detail

WINTER 2022 View Scheduled Disbursement Dates

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


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


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
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



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

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

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

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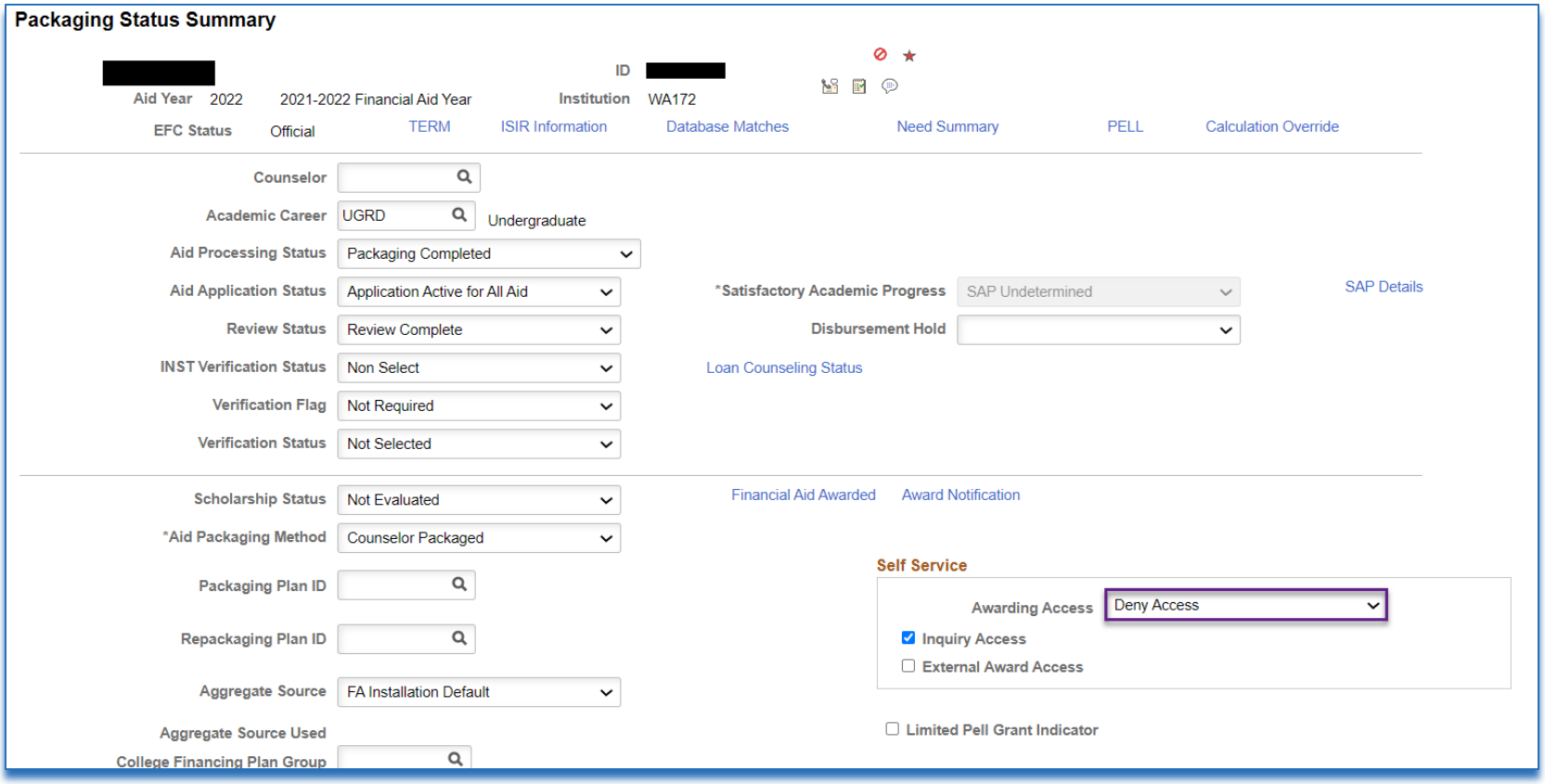
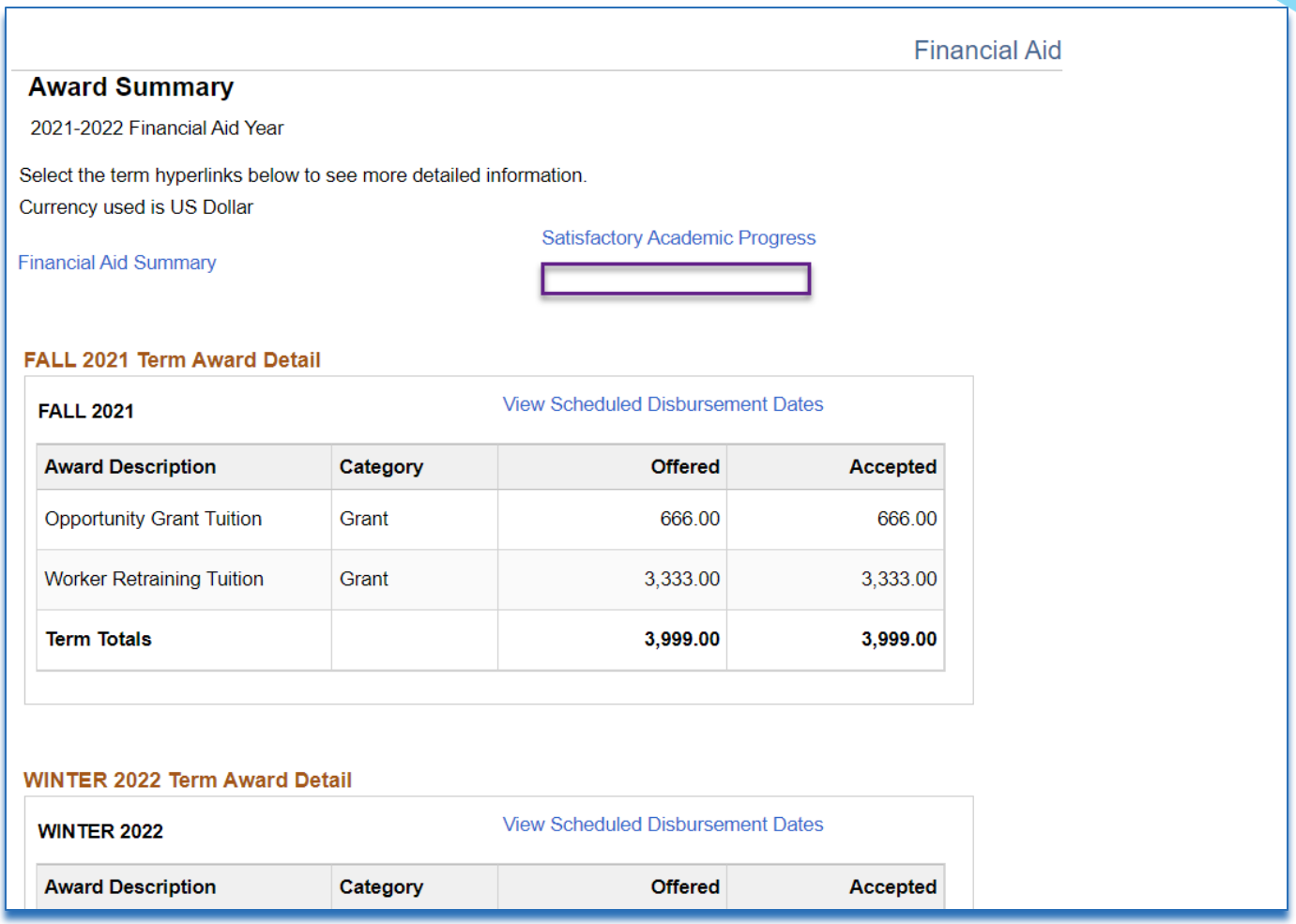
Navigation: Nav Bar > Navigator > Financial Aid > View Packaging Status Summary



COMMUNITY AND TECHNICAL COLLEGES
Washington State Board

ctcLink



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

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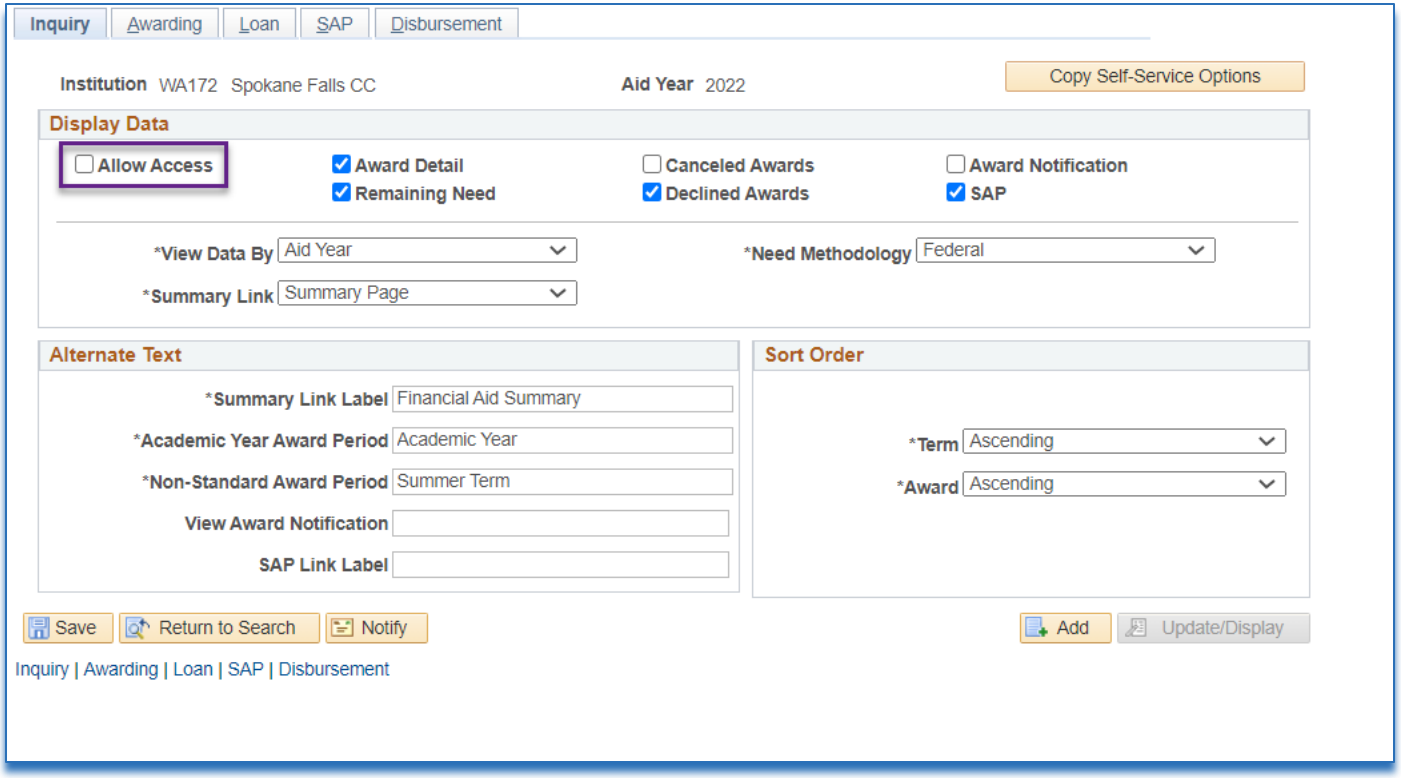
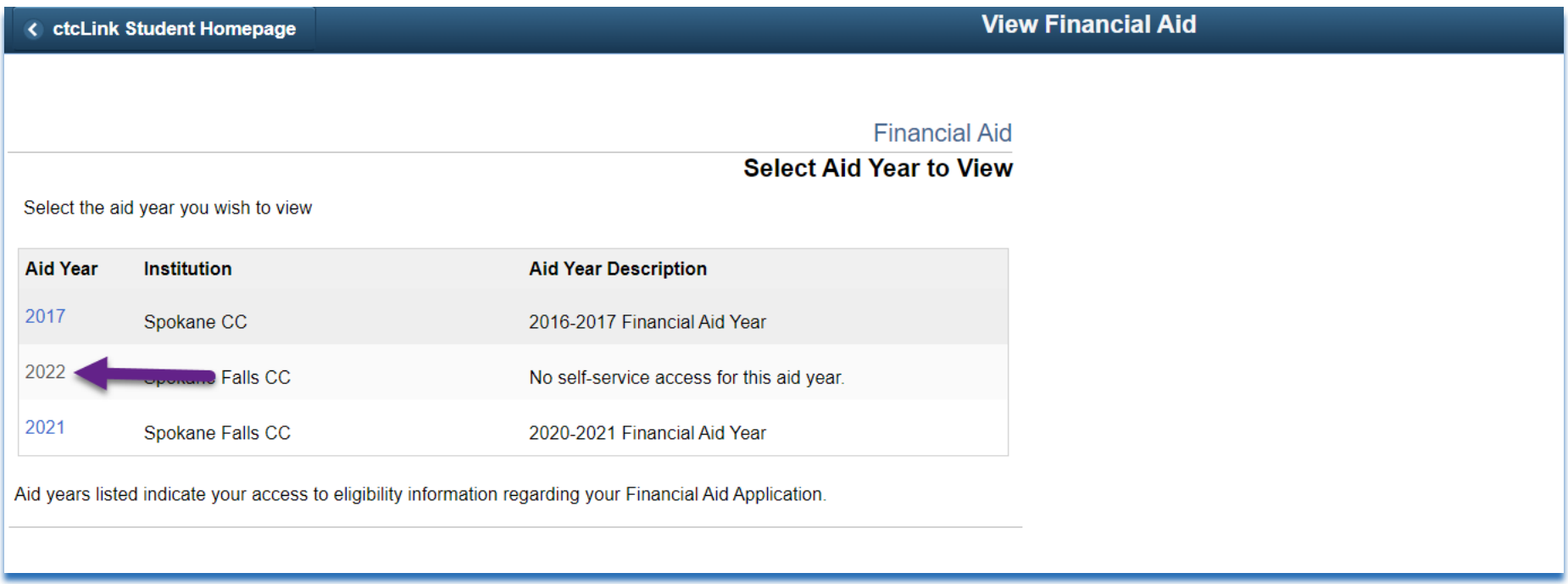
Navigation: Nav Bar > Navigator > Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options



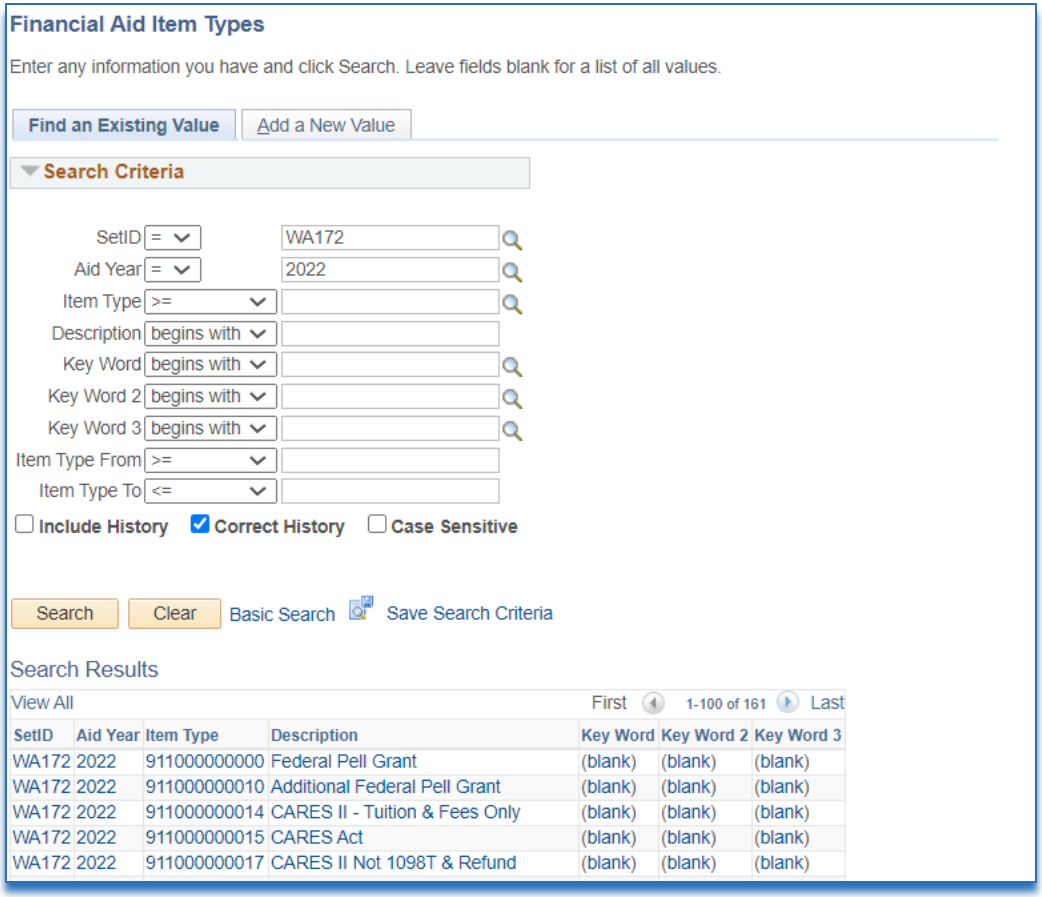


When you uncheck the **Allow Access** checkbox on the on the Self-Service Options page for that aid year, the link for the aid year disappears for students.

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.

Find an Existing Value | Add a New Value

Search Criteria

SetID	=	WA172
Aid Year	=	2022
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	<=	

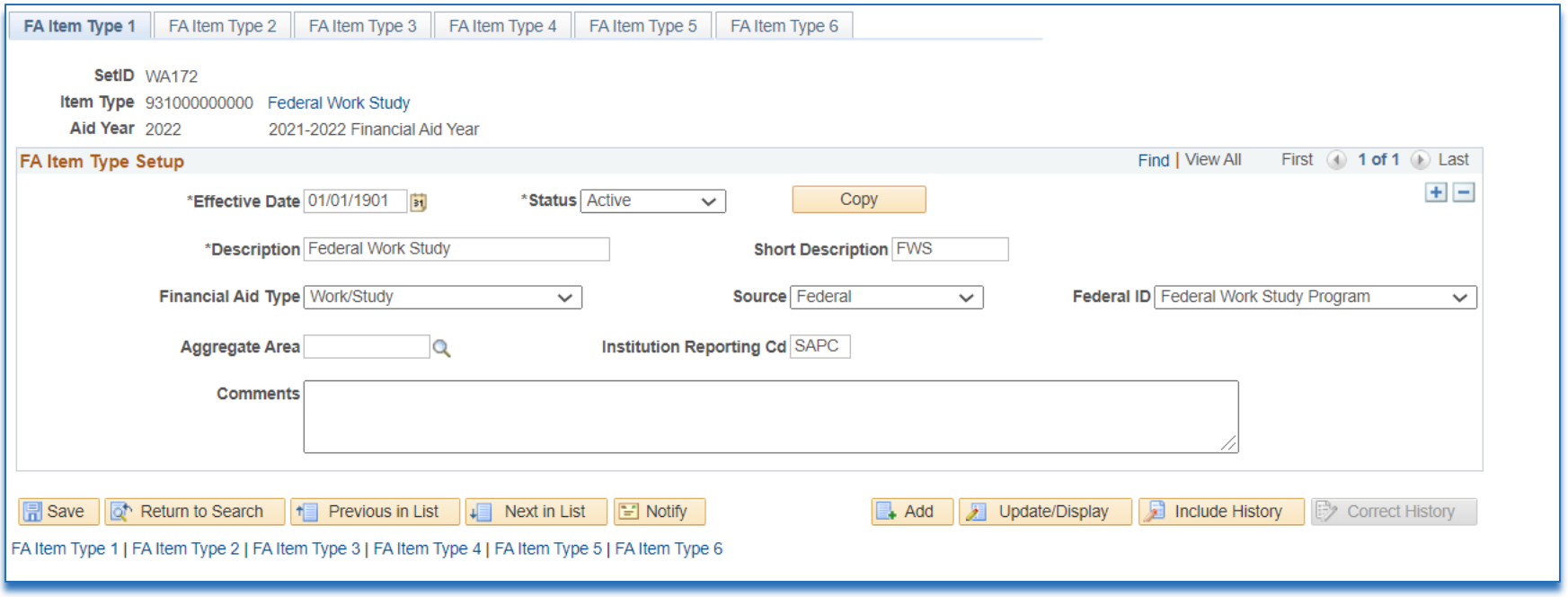
☐ Include History ☑ Correct History ☐ Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

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 01/01/1901
*Status Active
Copy
*Description Federal Work Study
Short Description FWS
Financial Aid Type Work/Study
Source Federal
Federal ID Federal Work Study Program
Aggregate Area
Institution Reporting Cd SAPC
Comments
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

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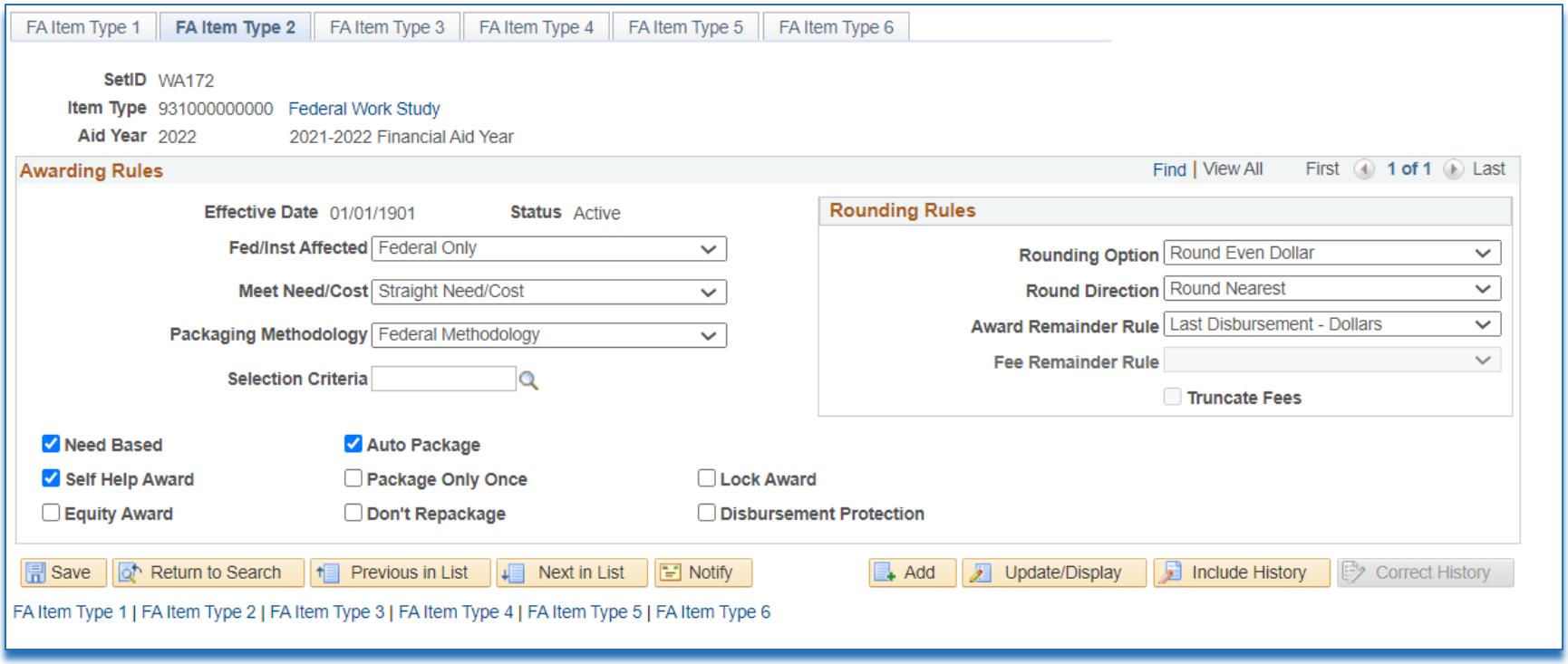


Meet Need/Cost

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.

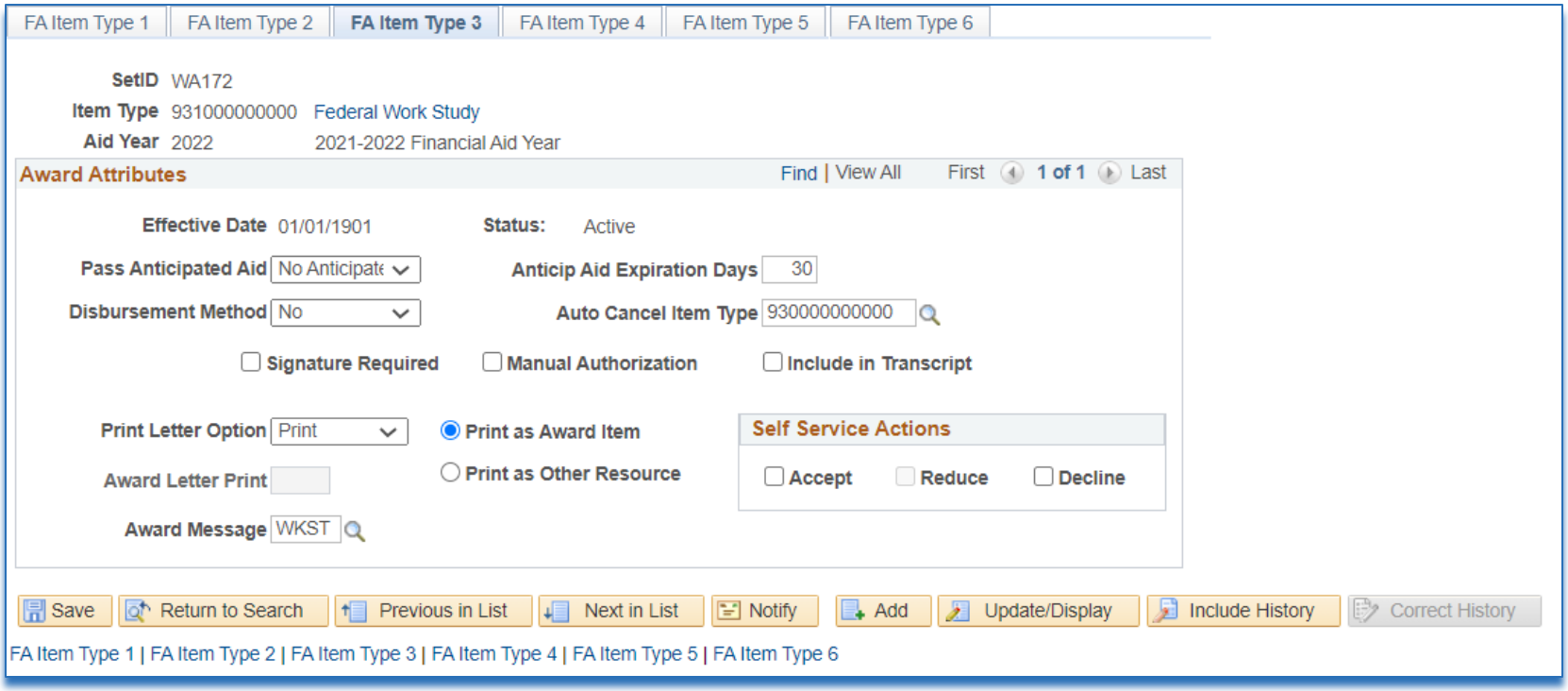
Cost Only: The awarded amount affects only the unmet COA balance.

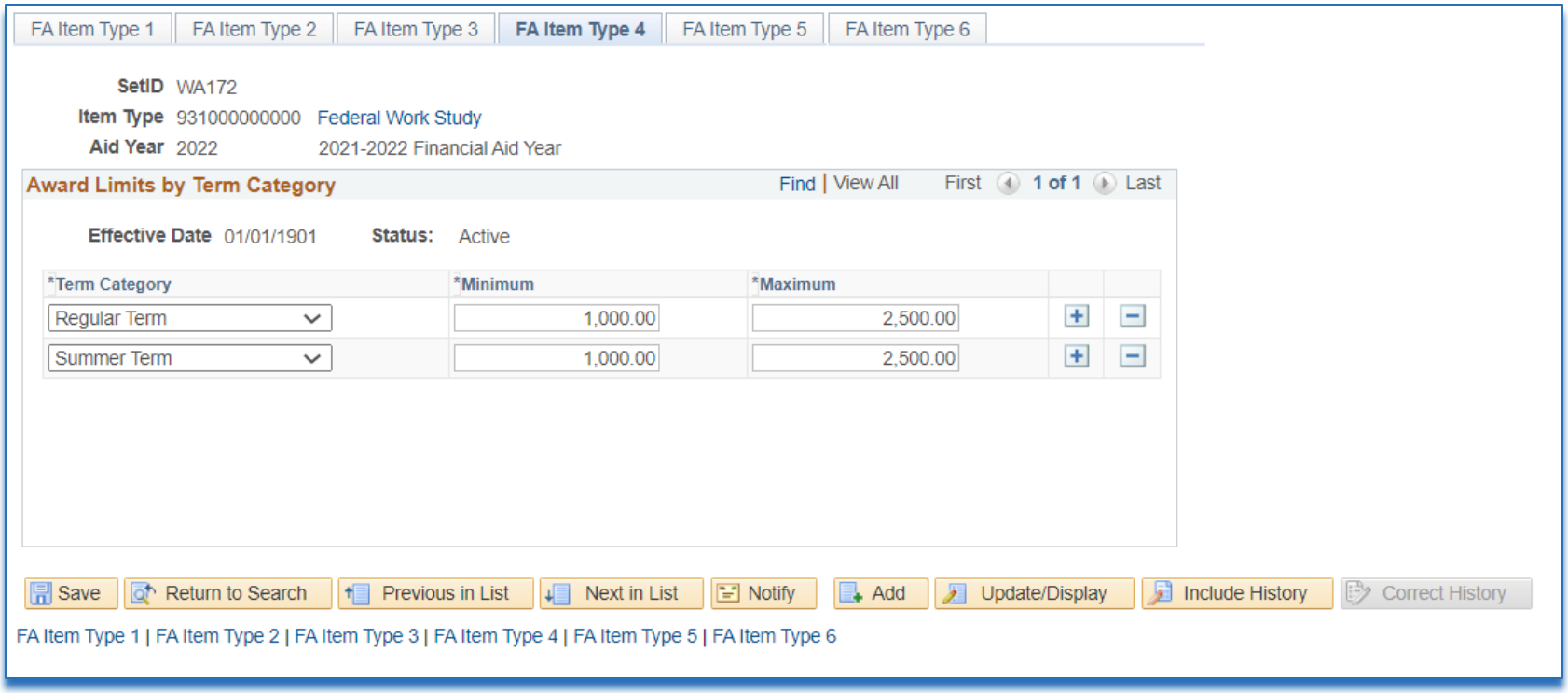
Need Only: The awarded amount affects only the unmet need balance.

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
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
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

COMMUNITY AND TECHNICAL COLLEGES
Washington State Board

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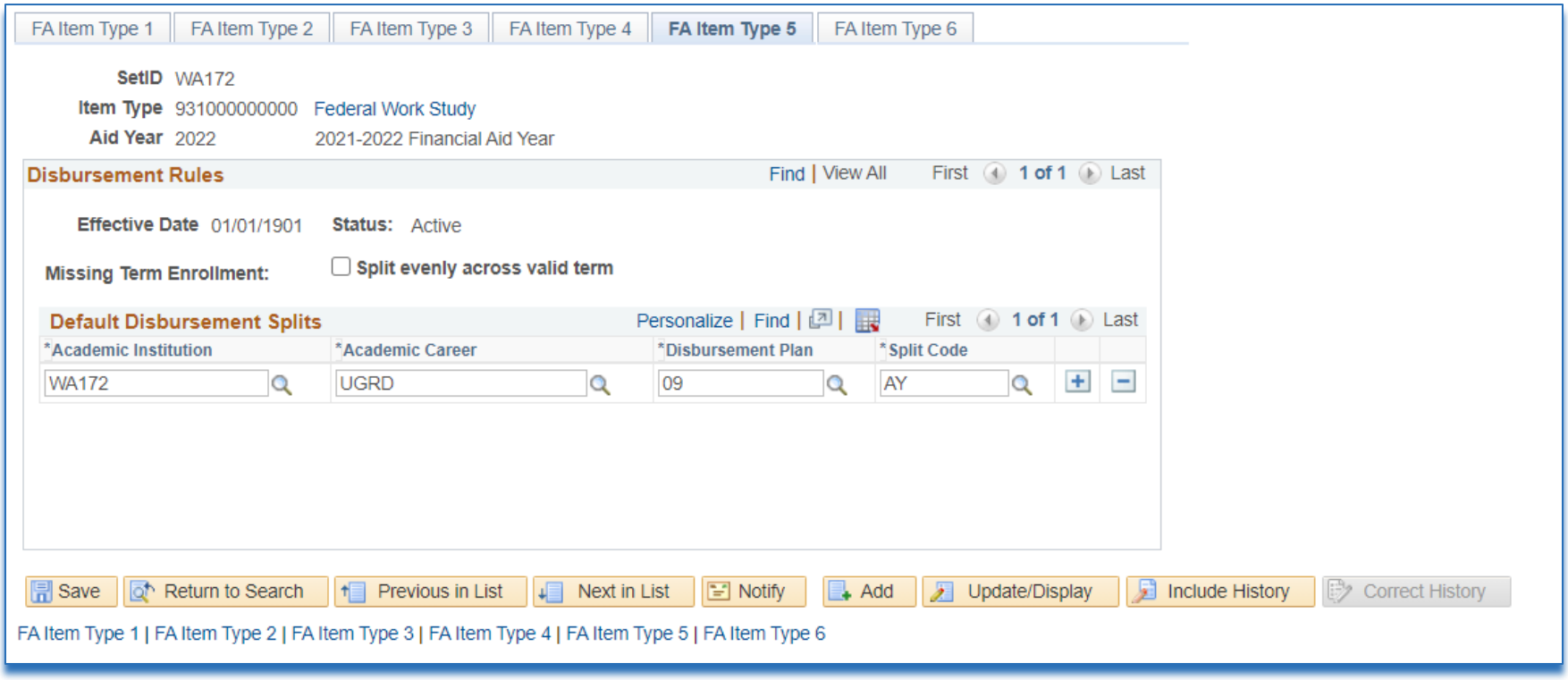
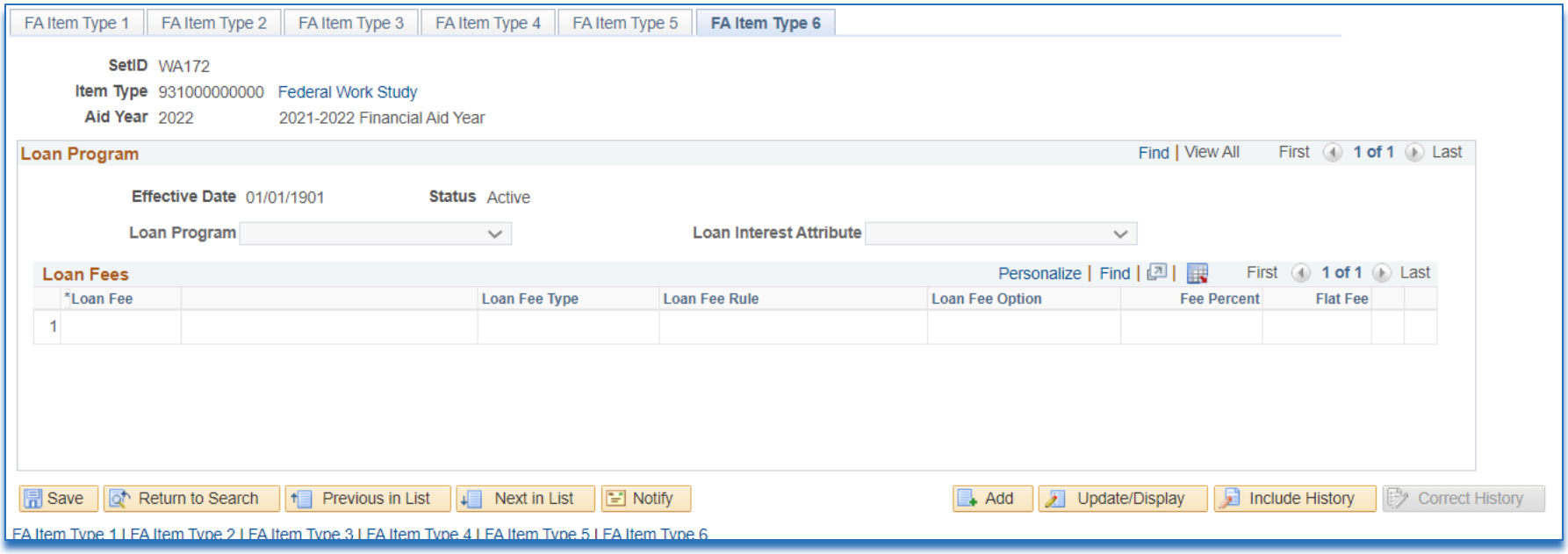
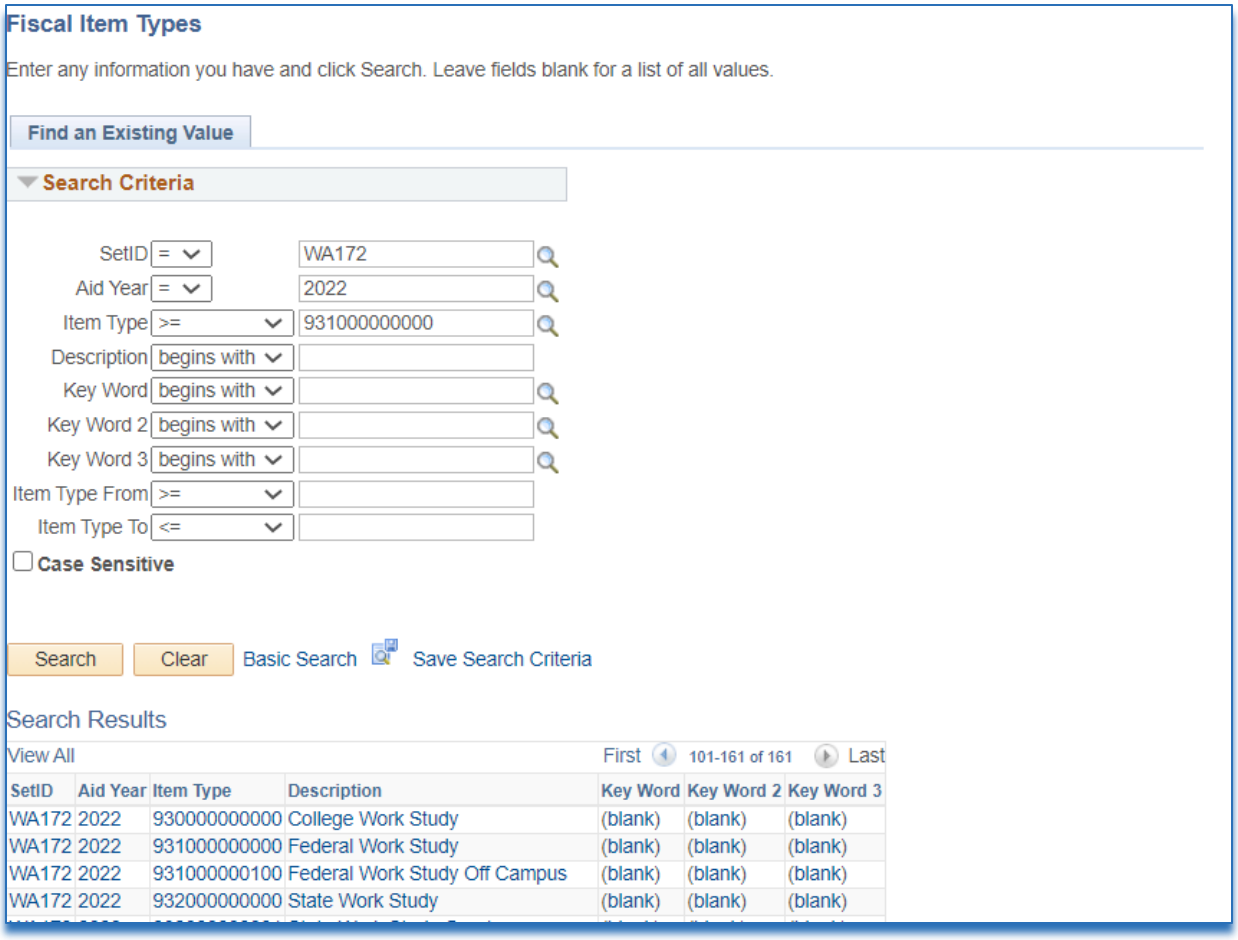
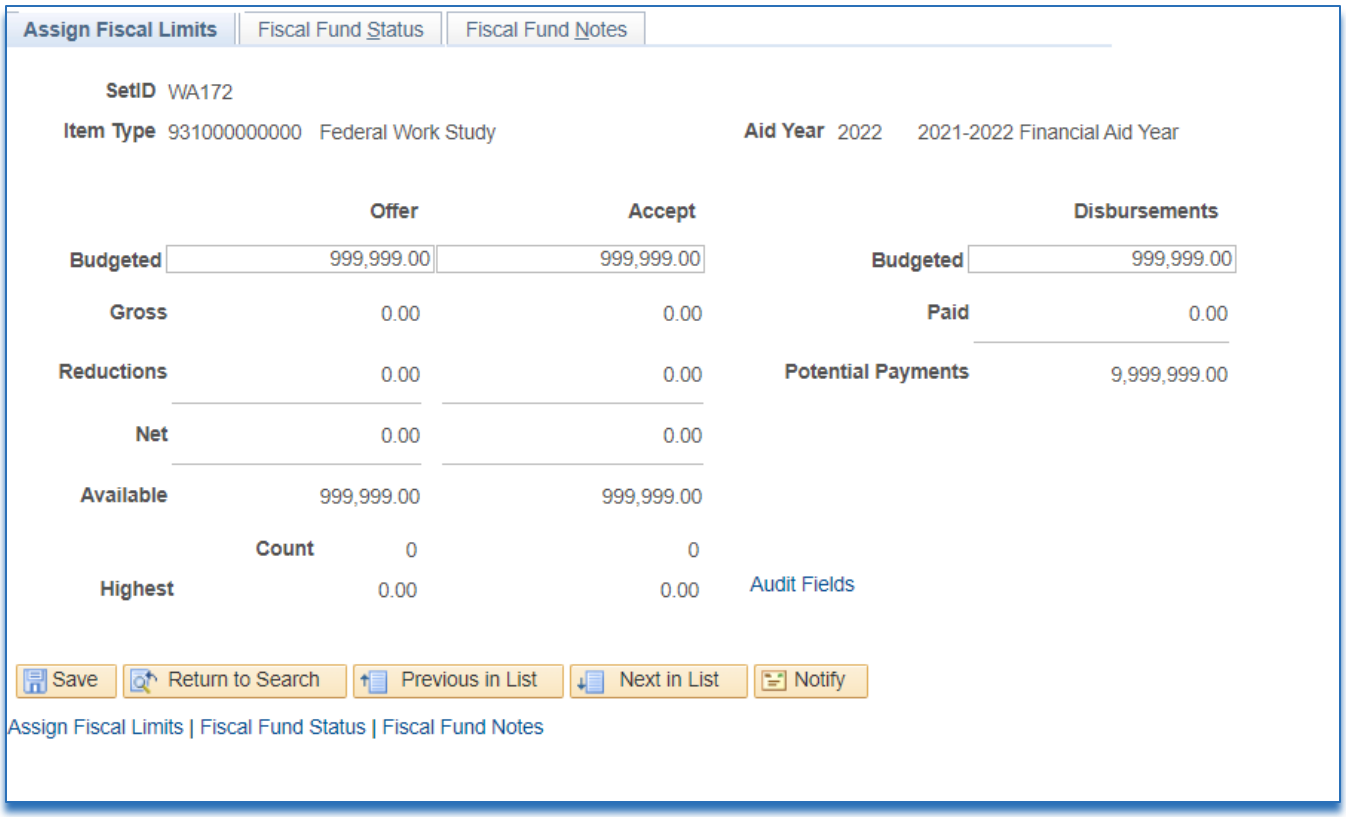



FA Item Type 1
FA Item Type 2
FA Item Type 3
FA Item Type 4
FA Item Type 5
FA Item Type 6
SetID WA172
Item Type 931000000000 Federal Work Study
Aid Year 2022 2021-2022 Financial Aid Year
Loan Program
Find | View All First 1 of 1 Last
Effective Date 01/01/1901
Status Active
Loan Program
Loan Interest 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
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

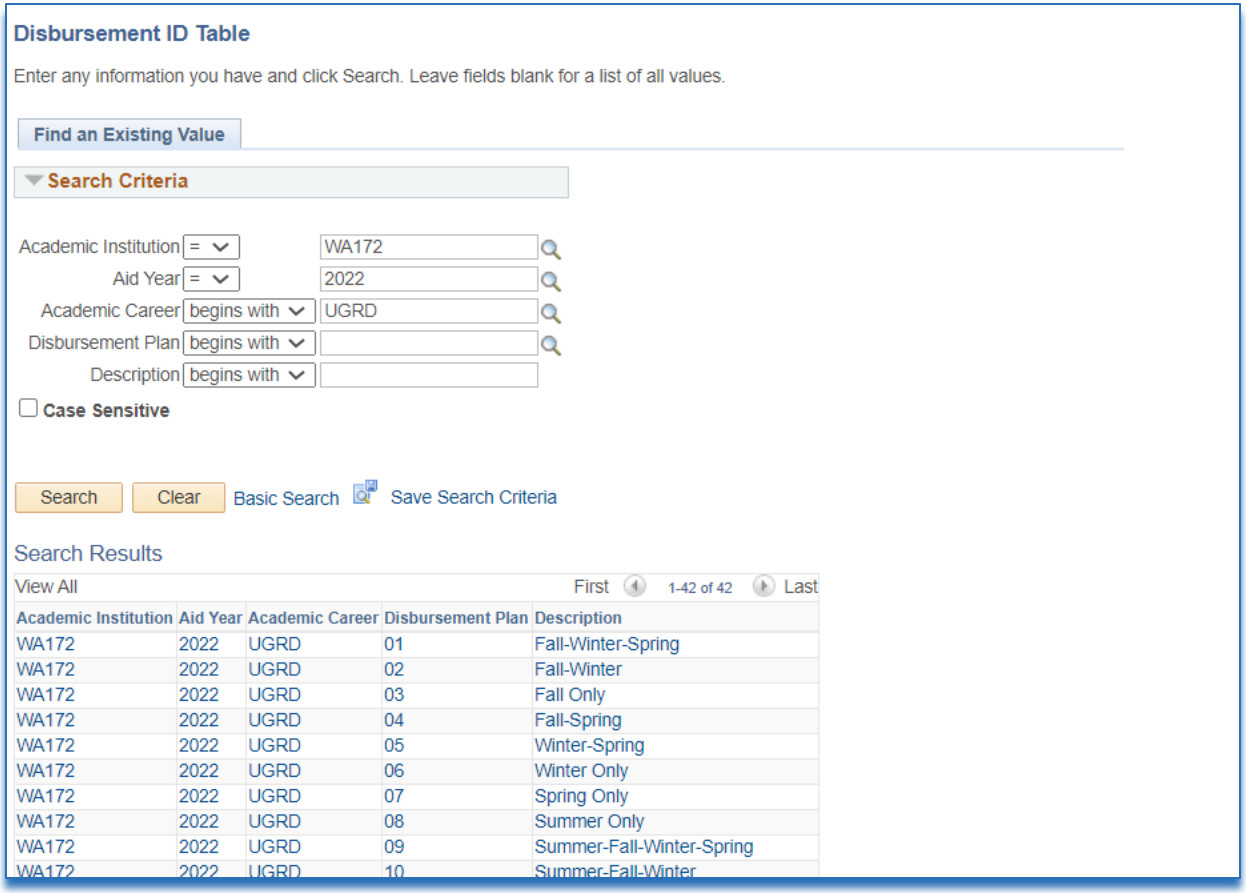
Navigation: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Fiscal Item Types



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.



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	=	WA172
Aid Year	=	2022
Academic Career	begins with	UGRD
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

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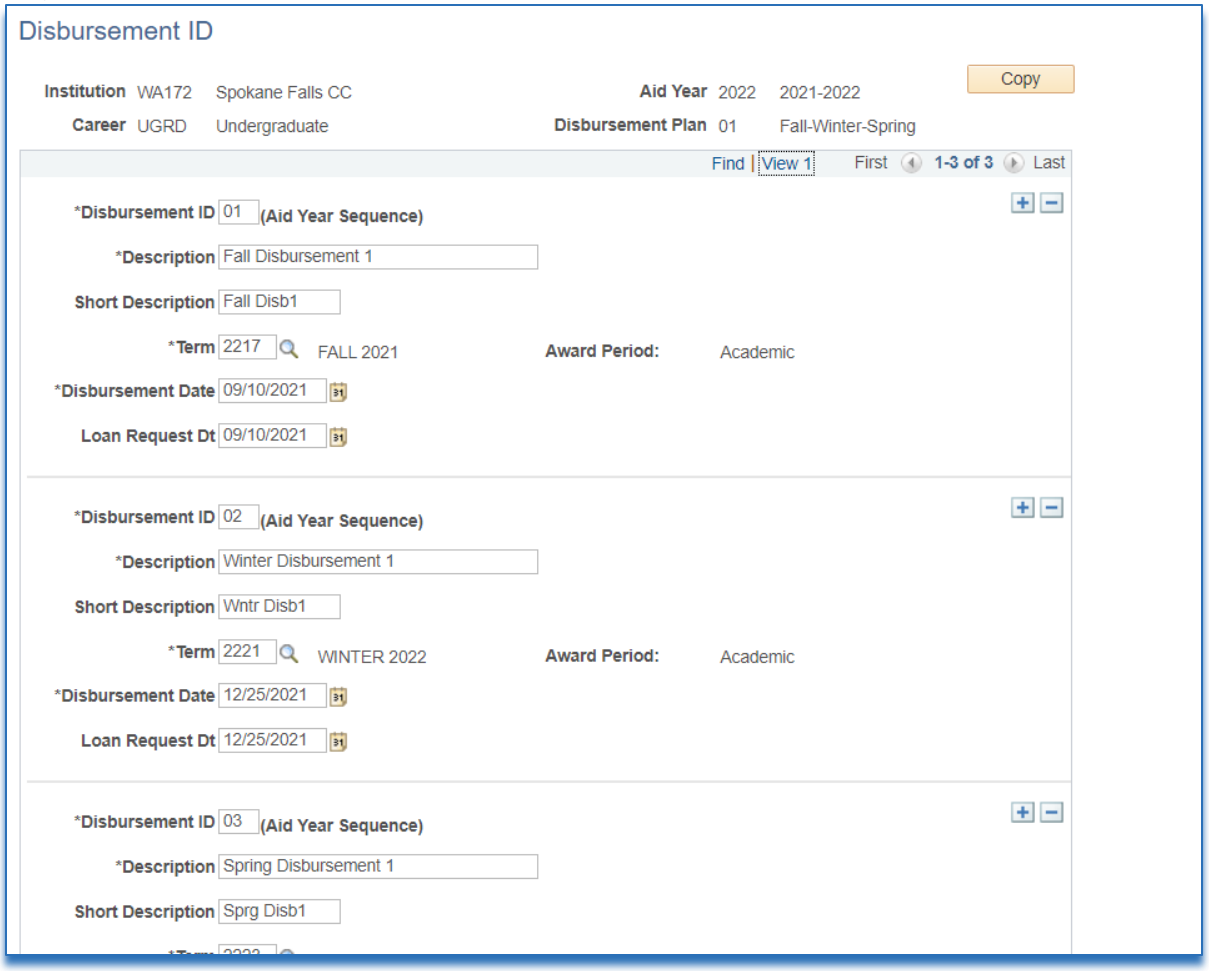

The date entered for Disbursement Date will be displayed to the student under the *View Scheduled Disbursement Dates* link.

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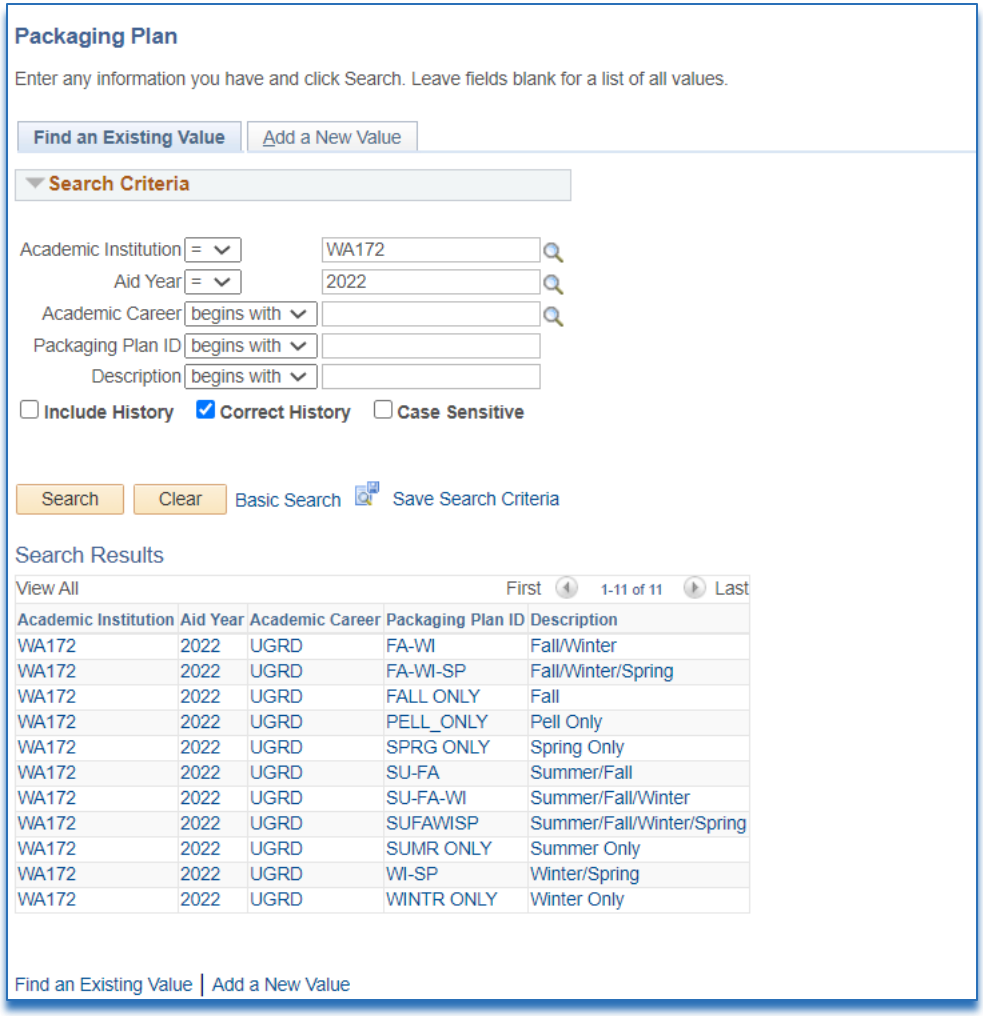
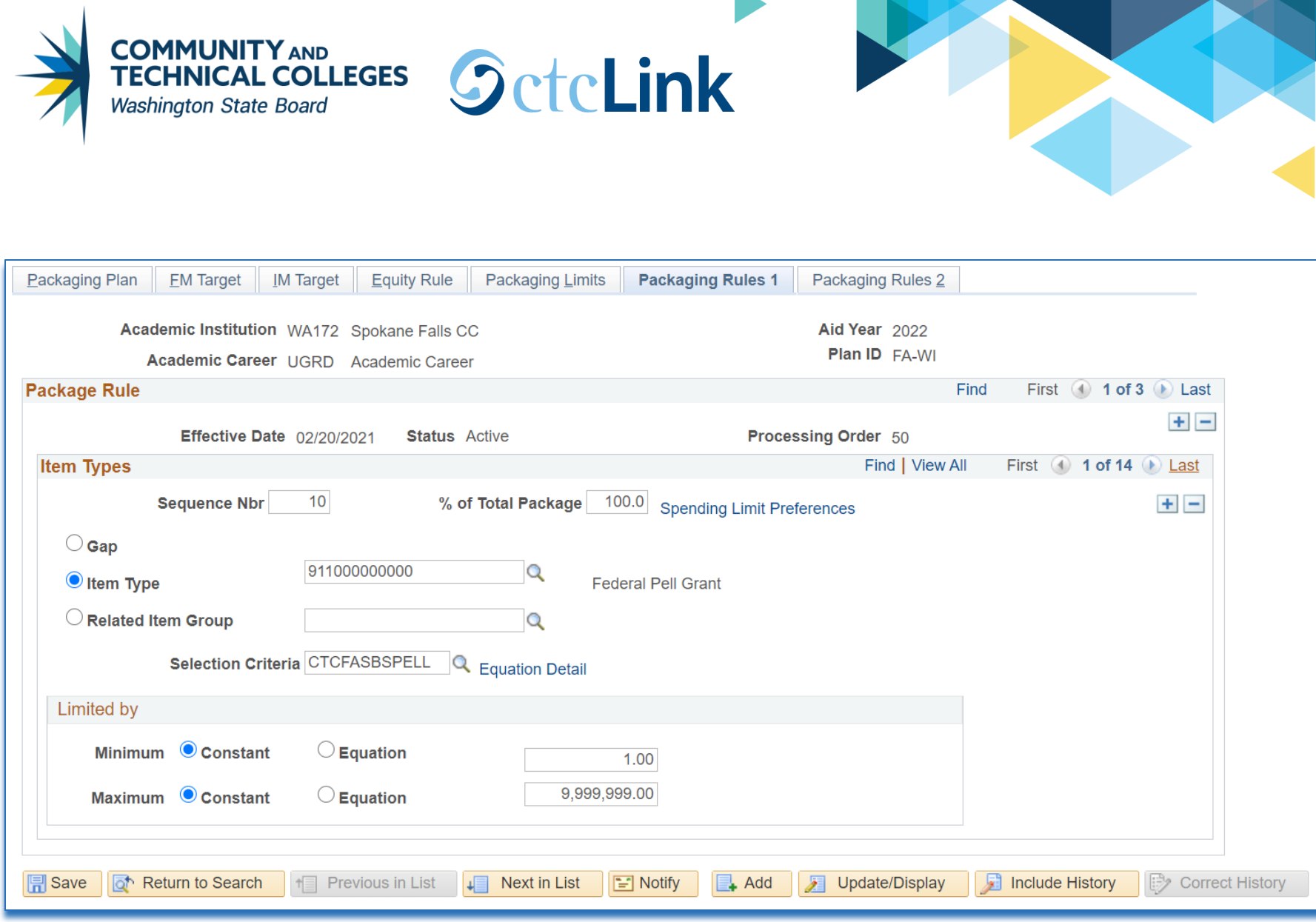
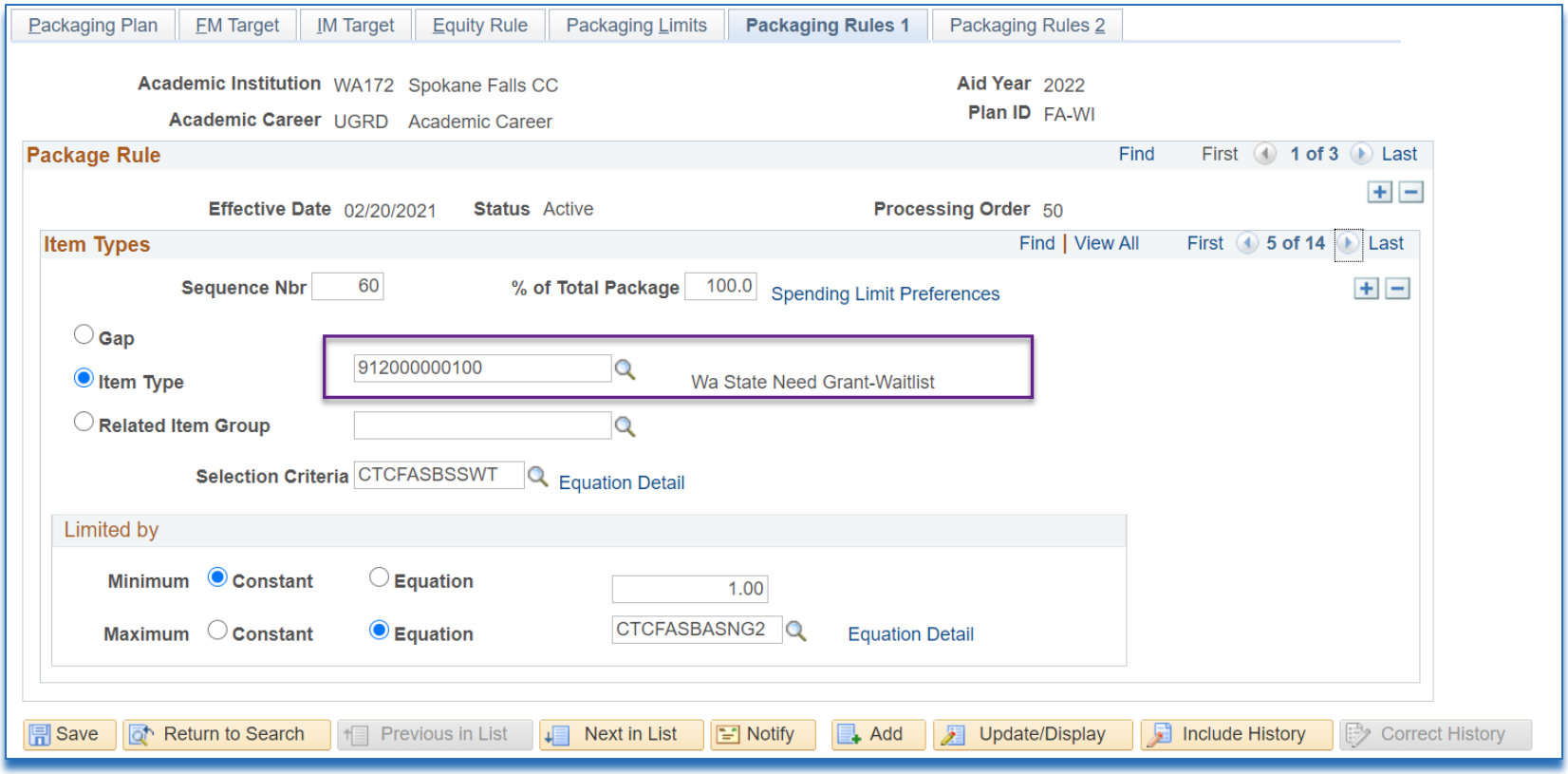
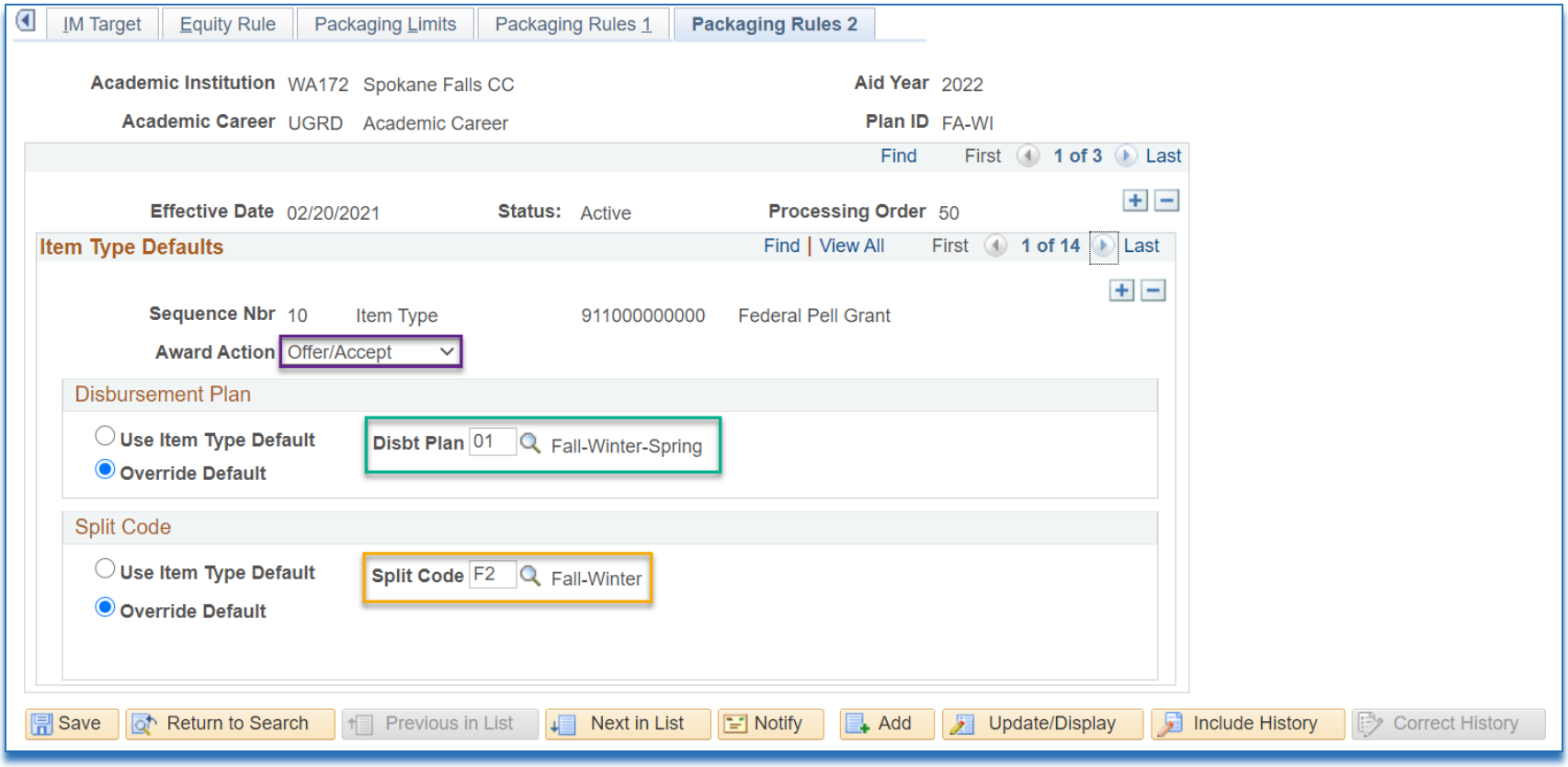
Navigation: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan



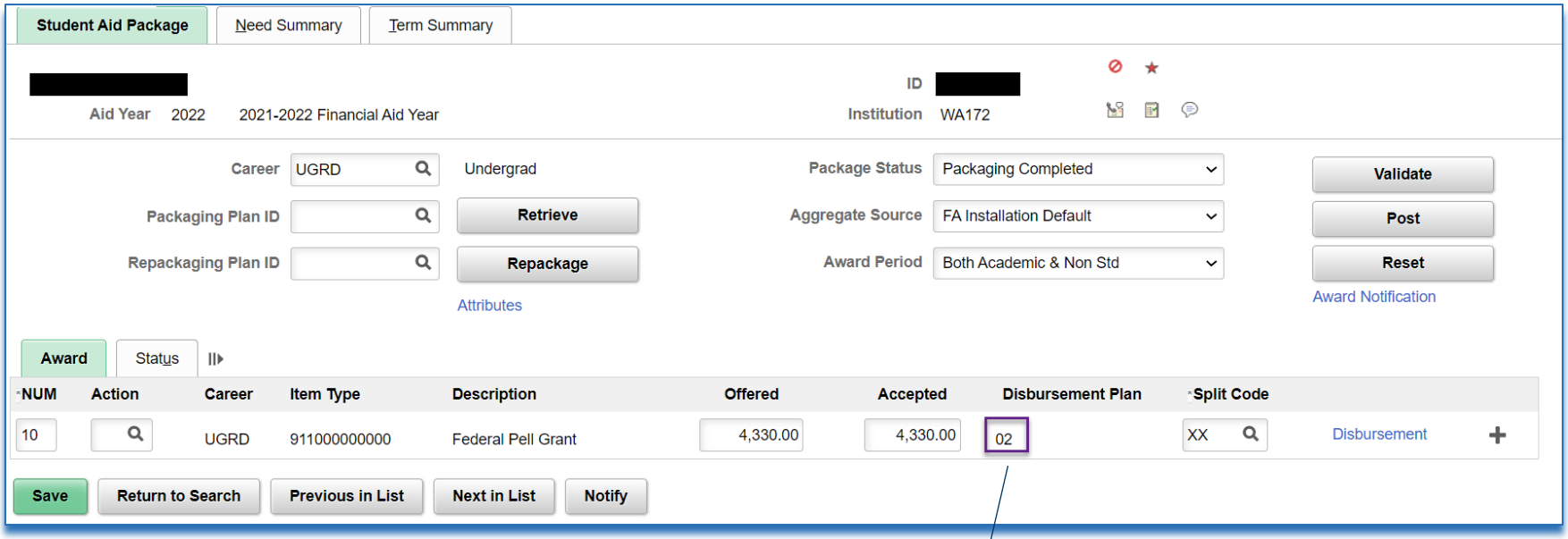

Packaging Plan
FM Target
IM Target
Equity Rule
Packaging Limits
Packaging Rules 1
Packaging Rules 2
Academic Institution WA172 Spokane Falls CC
Academic Career UGRD Academic Career
Aid Year 2022
Plan ID FA-WI
Package Rule
Find First 1 of 3 Last
Effective Date 02/20/2021
Status Active
Processing Order 50
Item Types
Find | View All First 1 of 14 Last
Sequence Nbr 10
% of Total Package 100.0
Spending Limit Preferences
Gap
Item Type 911000000000
Federal Pell Grant
Related Item Group
Selection Criteria CTCFASBSPELL
Equation Detail
Limited by
Minimum Constant Equation 1.00
Maximum Constant Equation 9,999,999.00
Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display
Include History
Correct History

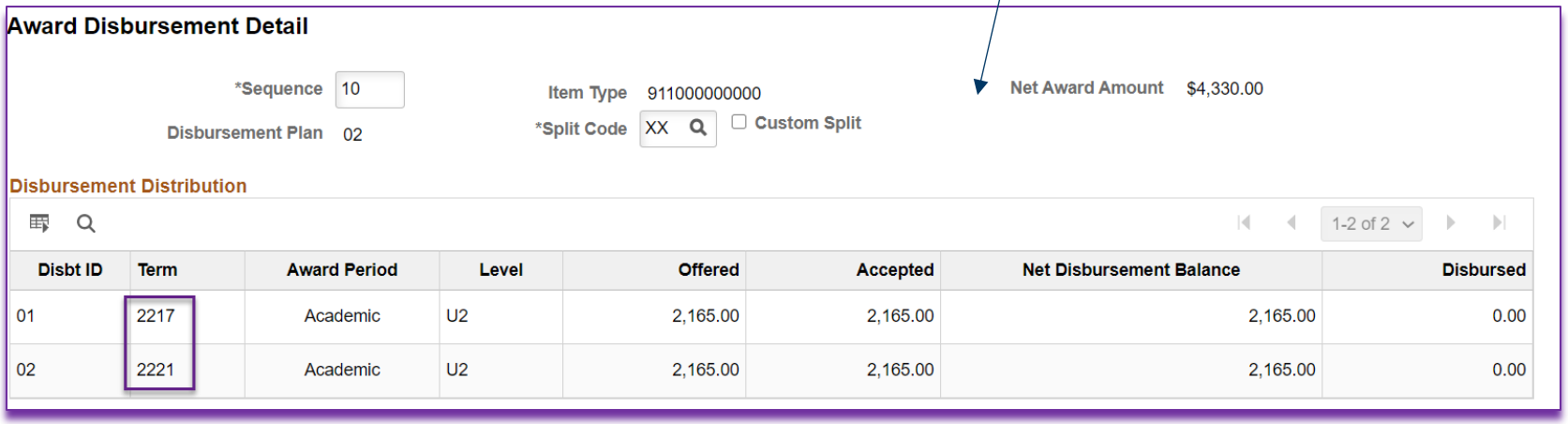


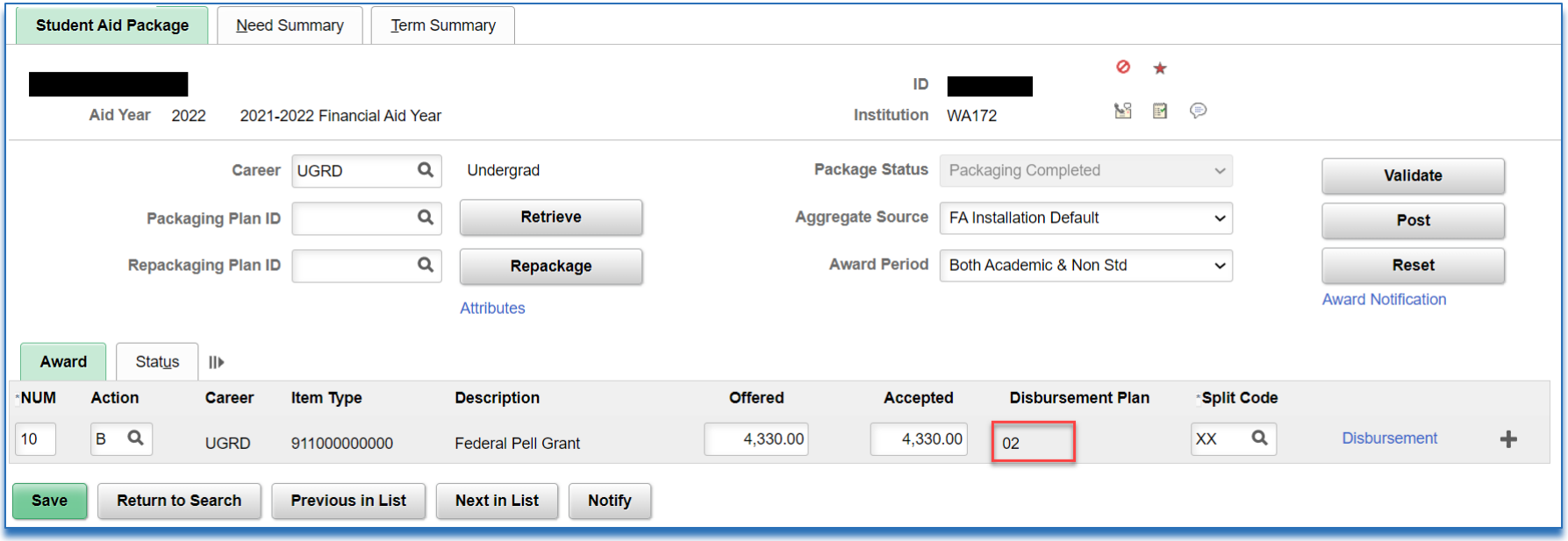
WSAC eliminated the WCG Waitlist starting 2020-2021 aid year, but the CBS equation requires the WCG Waitlist Item-type be in the packaging plans that have CBS in them. DO NOT REMOVE.



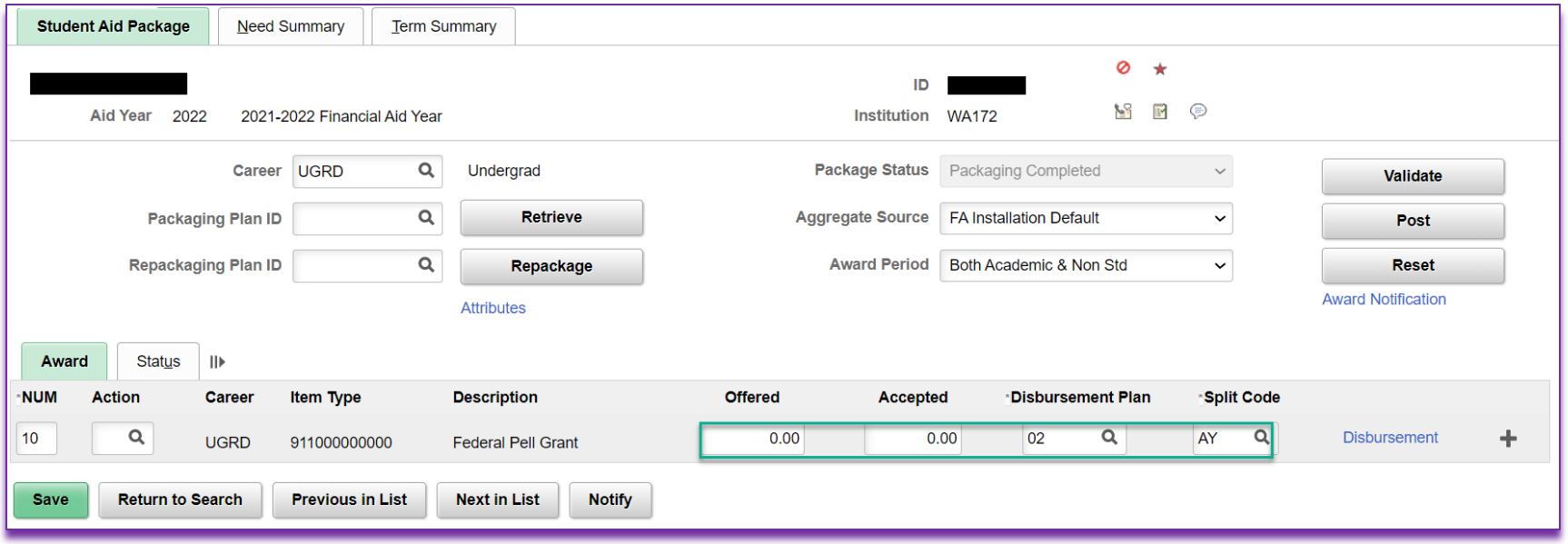
Make sure to open up buckets for future quarters!
Disbt Plan determines which buckets to open up.
Split Code determines which buckets to put the money in.


Student Aid Package
Need Summary
Term Summary
[redacted]
Aid Year 2022 2021-2022 Financial Aid Year
ID [redacted]
Institution WA172
Career UGRD Undergrad
Packaging Plan ID
Repackaging Plan ID
Retrieve
Repackage
Attributes
Package Status Packaging Completed
Aggregate Source FA Installation Default
Award Period Both Academic & Non Std
Validate
Post
Reset
Award Notification
Award
Status
*NUM Action Career Item Type Description Offered Accepted Disbursement Plan *Split Code
10 UGRD 911000000000 Federal Pell Grant 4,330.00 4,330.00 02 XX Disbursement
Save
Return to Search
Previous in List
Next in List
Notify

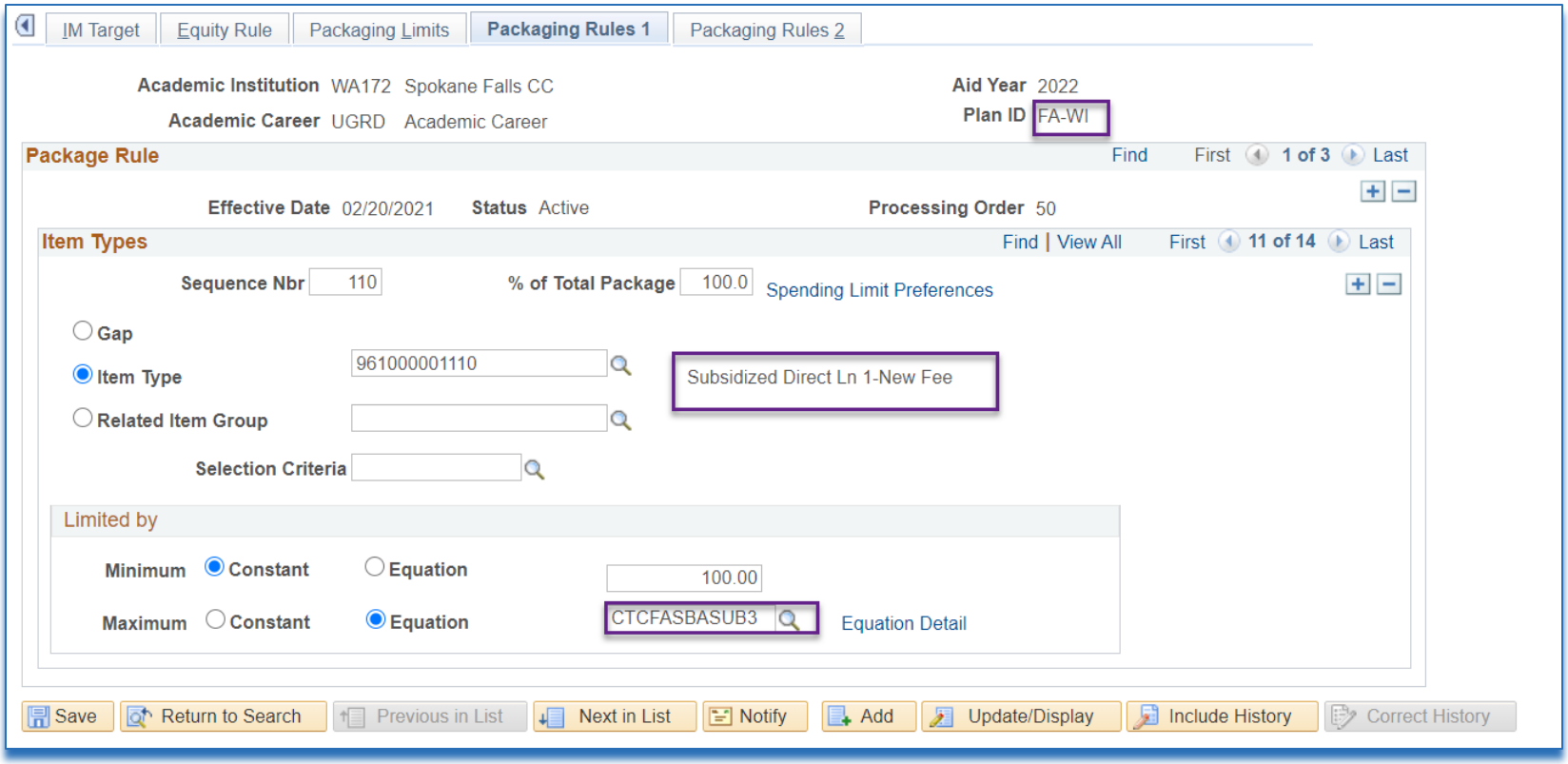

Award Disbursement Detail
*Sequence 10
Item Type 911000000000
Net Award Amount $4,330.00
Disbursement Plan 02
*Split Code XX
Custom Split
Disbursement Distribution
1-2 of 2
Disbt ID Term Award Period Level Offered Accepted Net Disbursement Balance Disbursed
01 2217 Academic U2 2,165.00 2,165.00 2,165.00 0.00
02 2221 Academic U2 2,165.00 2,165.00 2,165.00 0.00



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.



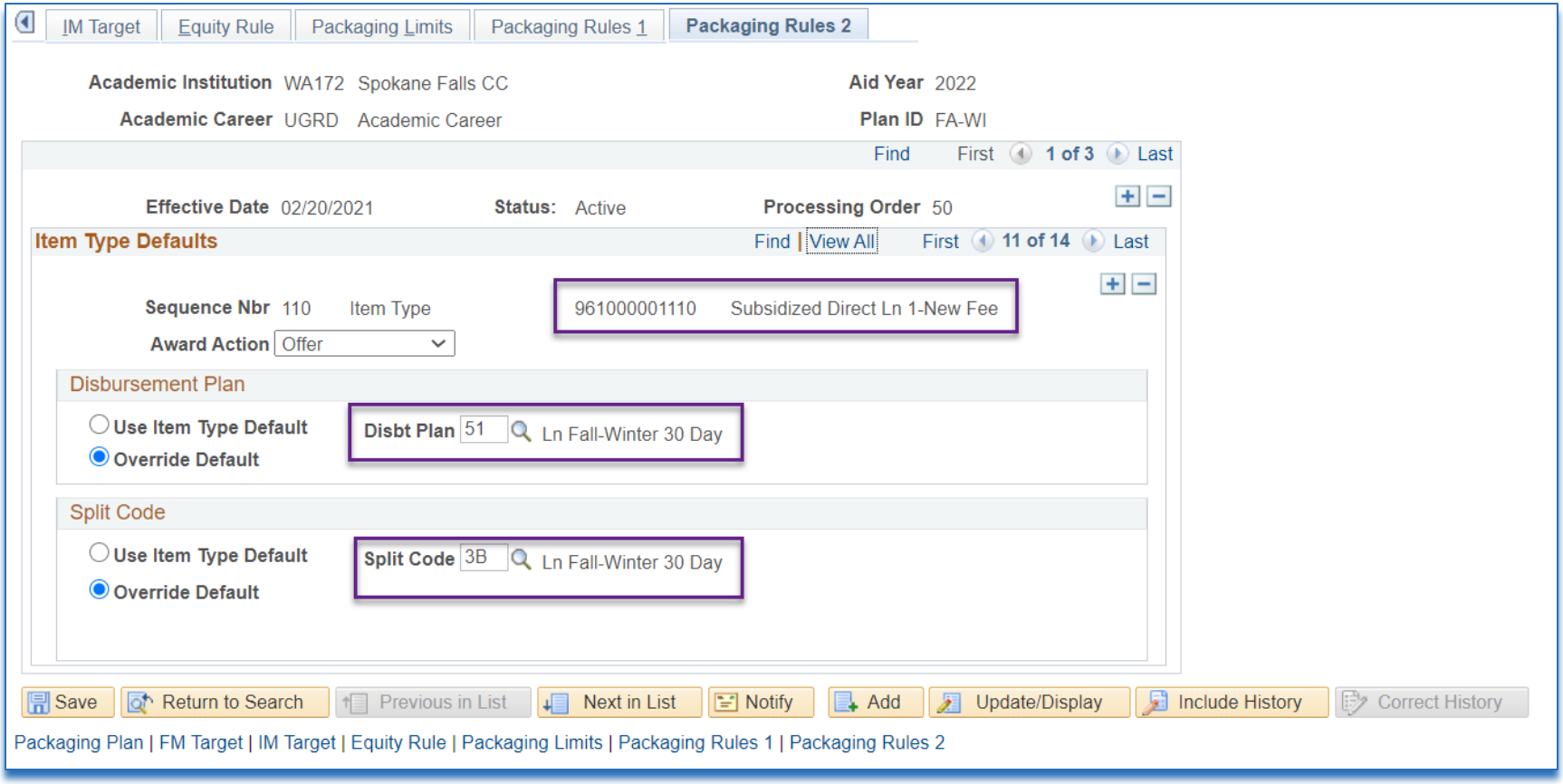
After you cancel the item-type, you can select a different Disbursement Plan ID.



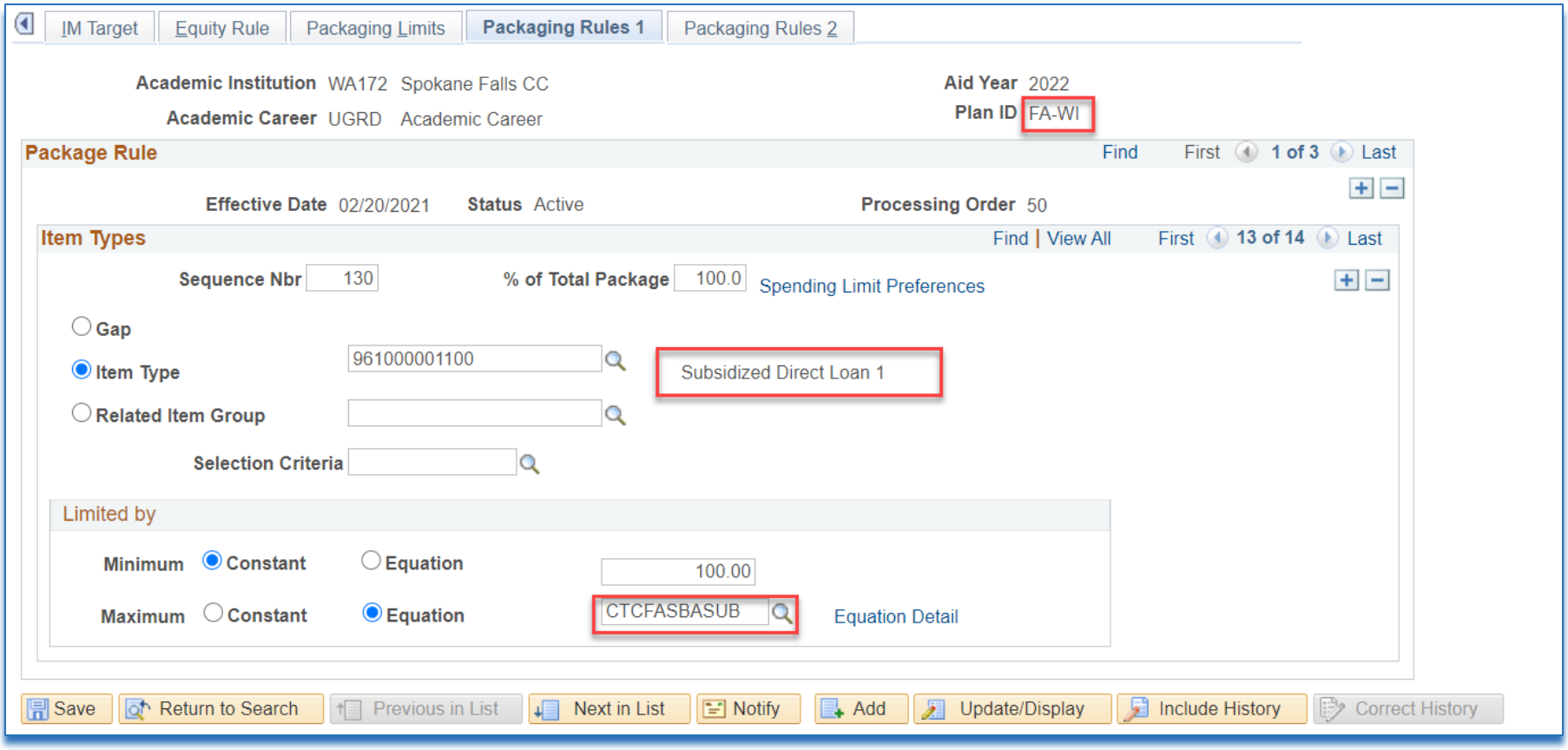
Keep Loan Sequestration dates in mind when reviewing which SUB/UNSUB loan item-type to have in packaging plans.

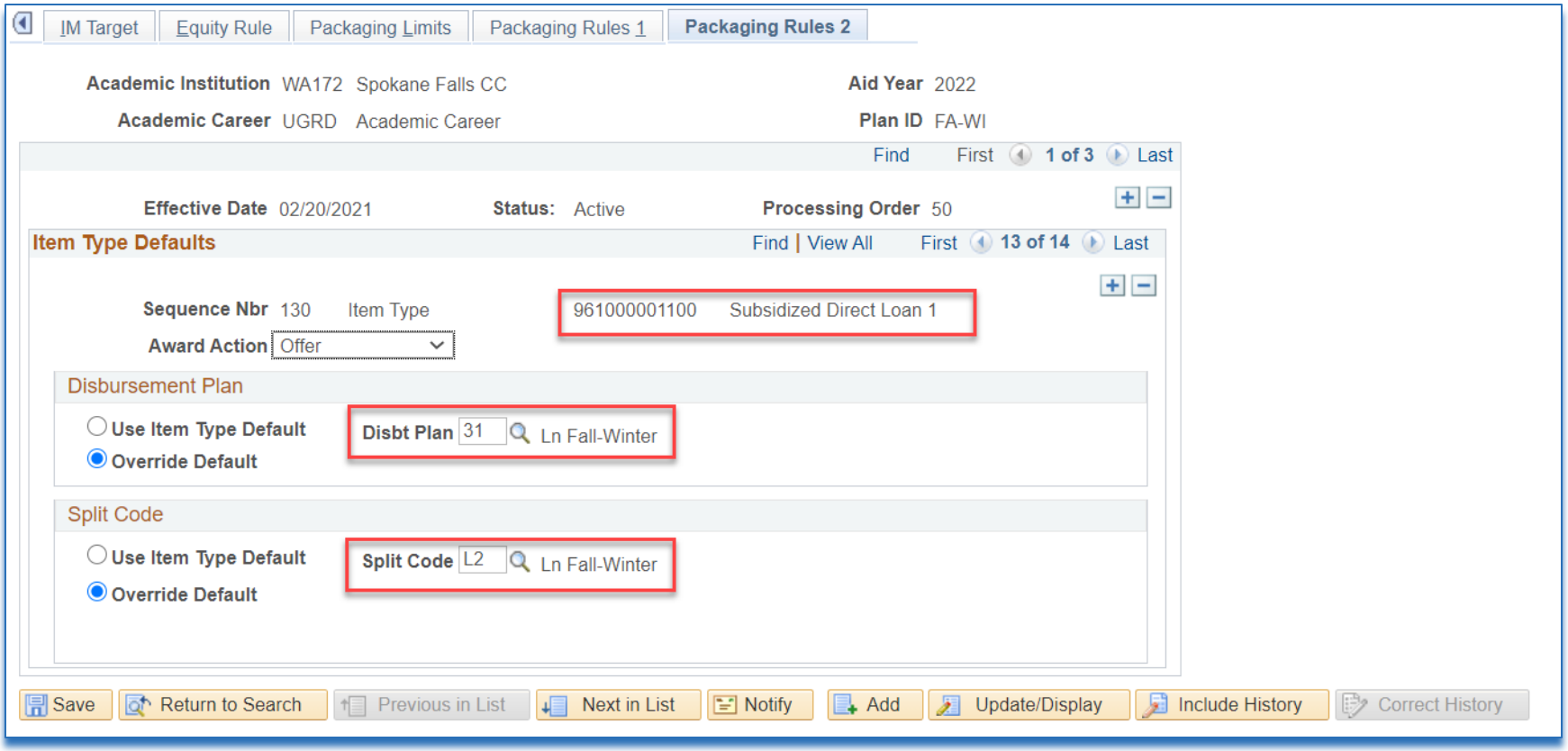
First disbursement before October 1st → Non new-fee item-type

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



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.


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


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
Override Default
Disbt Plan 31 Ln Fall-Winter
Split Code
Use Item Type Default
Override Default
Split Code L2 Ln Fall-Winter
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

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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

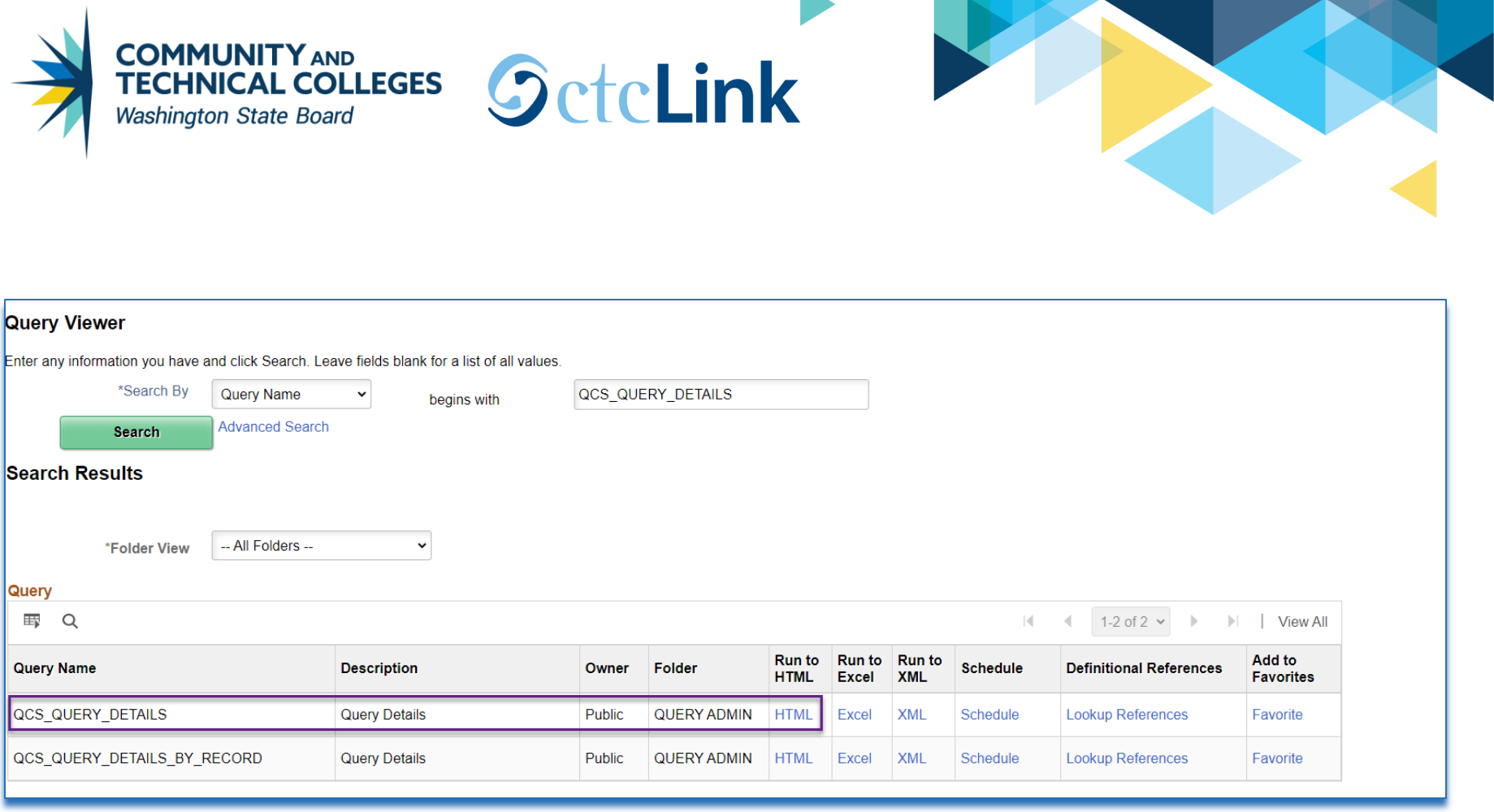
Search Results

*Folder View: -- All Folders --

Query

1-18 of 18 | View All

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
Query Name
begins with
QCS_QUERY_DETAILS
Search
Advanced Search
Search Results
*Folder View
-- All Folders --
Query
1-2 of 2
View All
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

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QCS_QUERY_DETAILS - Query Details

Query Name (wildcard %) QCS_FA_APPLIED_INCOMPLETE

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	rrussell@sbctc.edu	FA AWARD PACKAGING	FA applied but incomplete app	890:rrussell@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.

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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

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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…

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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")

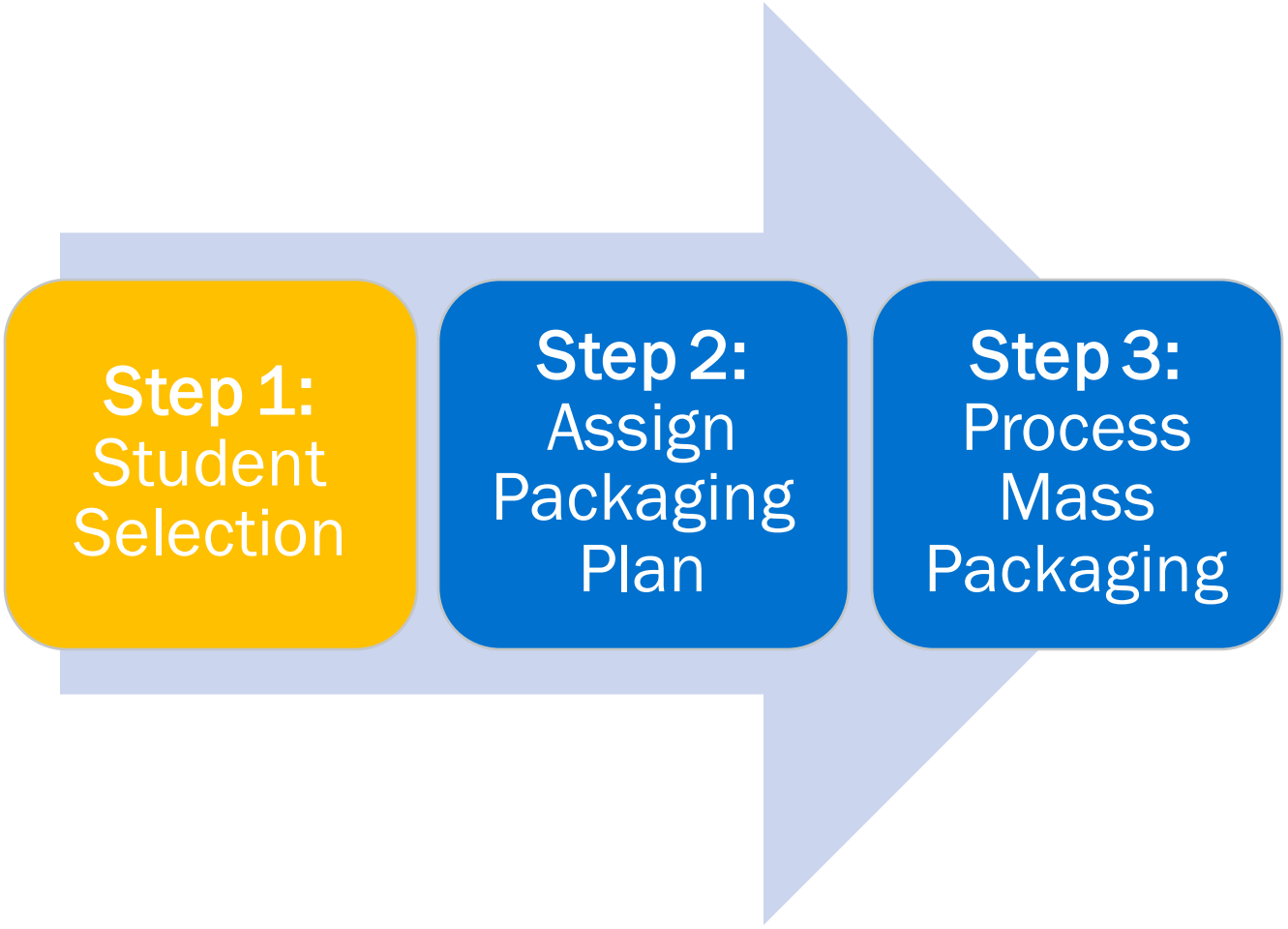
Contains SCCPU_STDNT_BND & SCC_PS_FINA_BND so it can be tied to a population update process as well as population selection process for 3Cs.

Q&A TIME

MASS PACKAGING

MASS PACKAGING

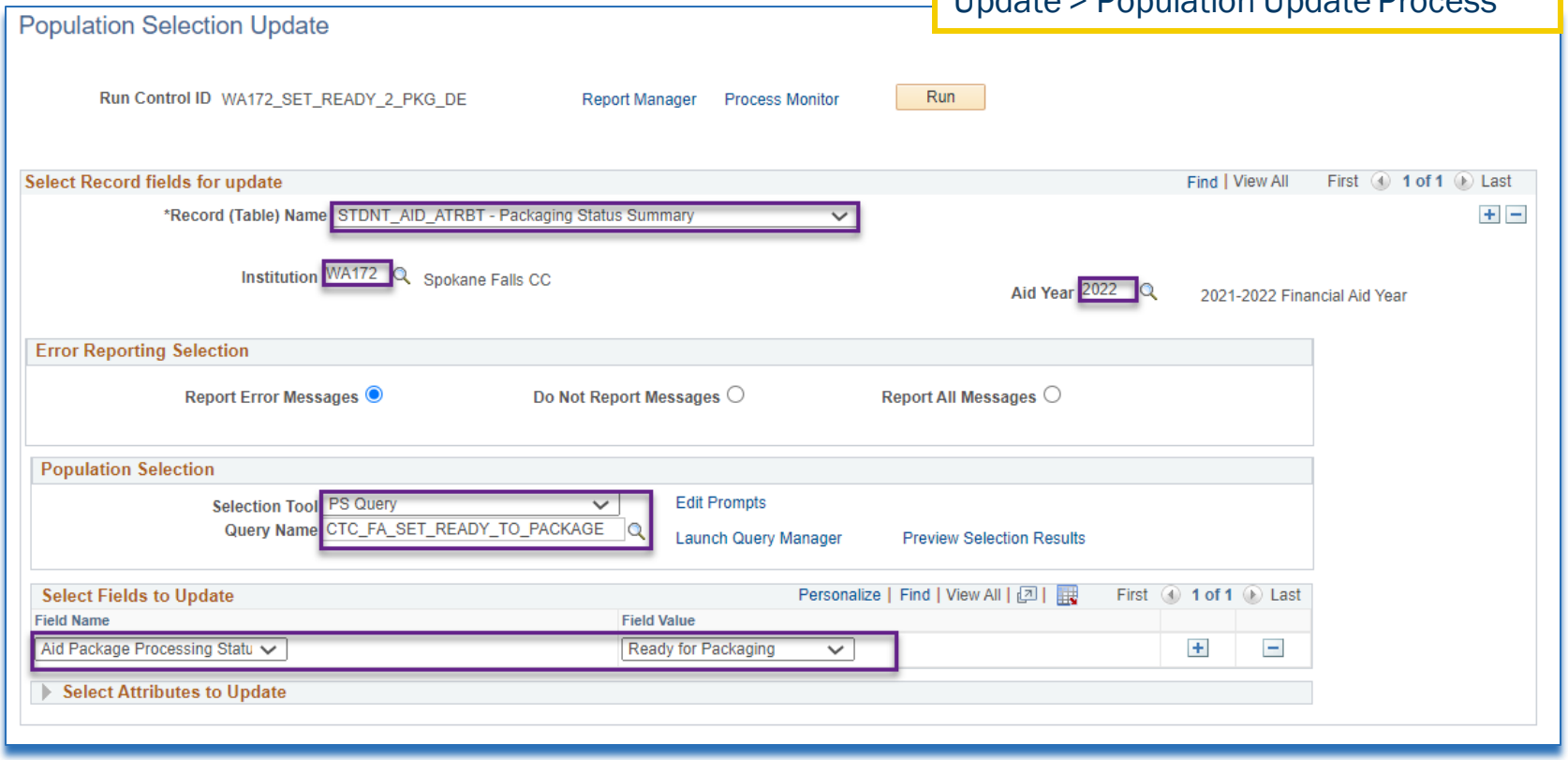
- 3-STEP PROCESS



SET READY FOR PACKAGING

- POPULATION SELECTION

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

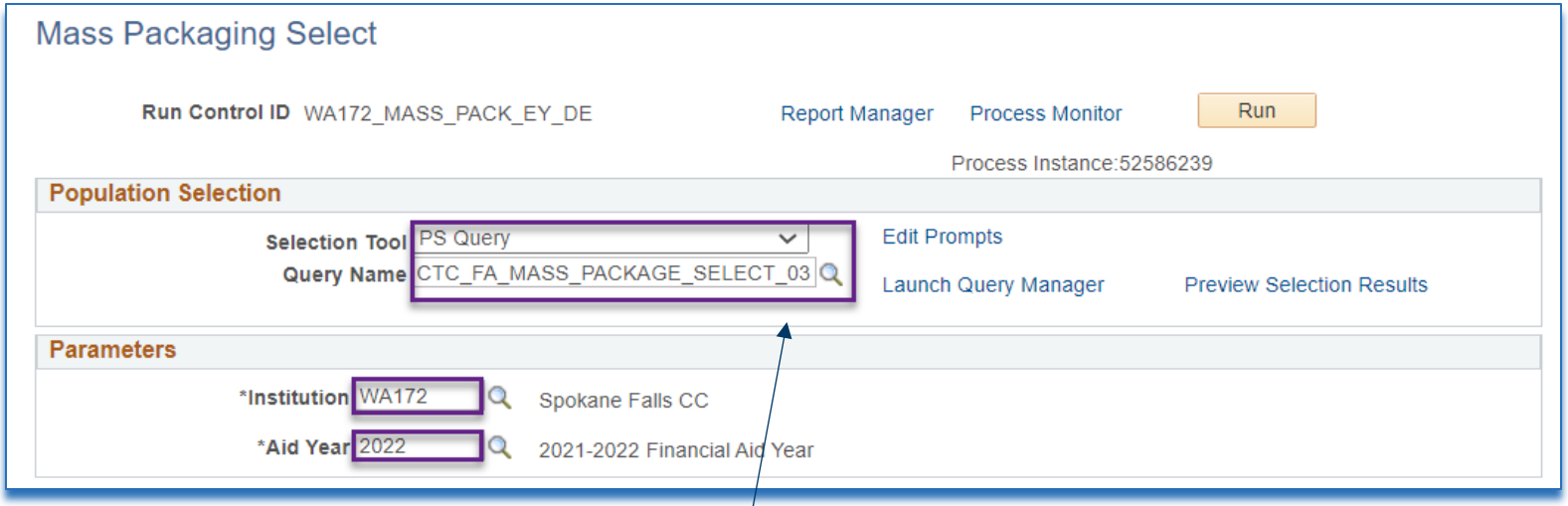


CTC_FA_SET_READY_TO_PACKAGE selects students with an Official EFC, SAP is anything but 'Not Meets' or 'Undetermined,' no FINA Requirements List checklists in 'Initiated' status, Aid Package Processing Status is 'Applied,' Review Status is 'Completed,' and Verification Status is not required or completed

MASS PACKAGING

- STUDENT SELECTION & REVIEW

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

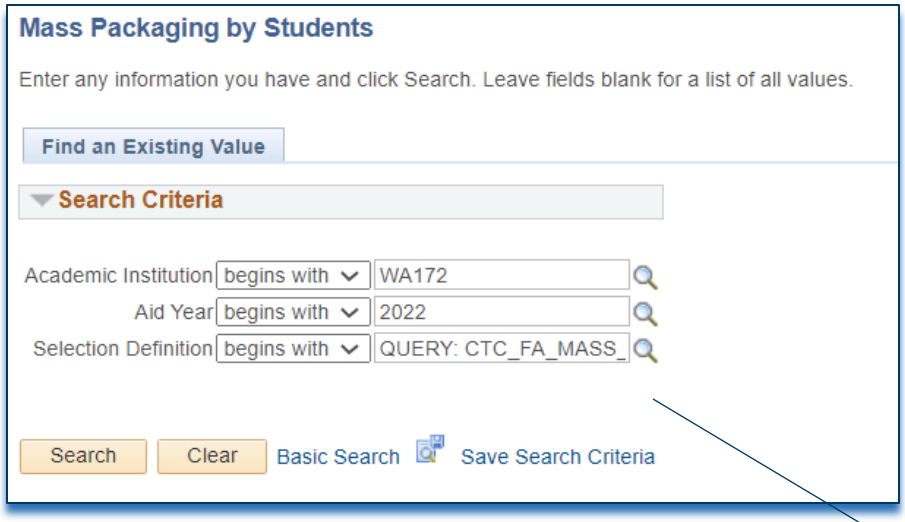


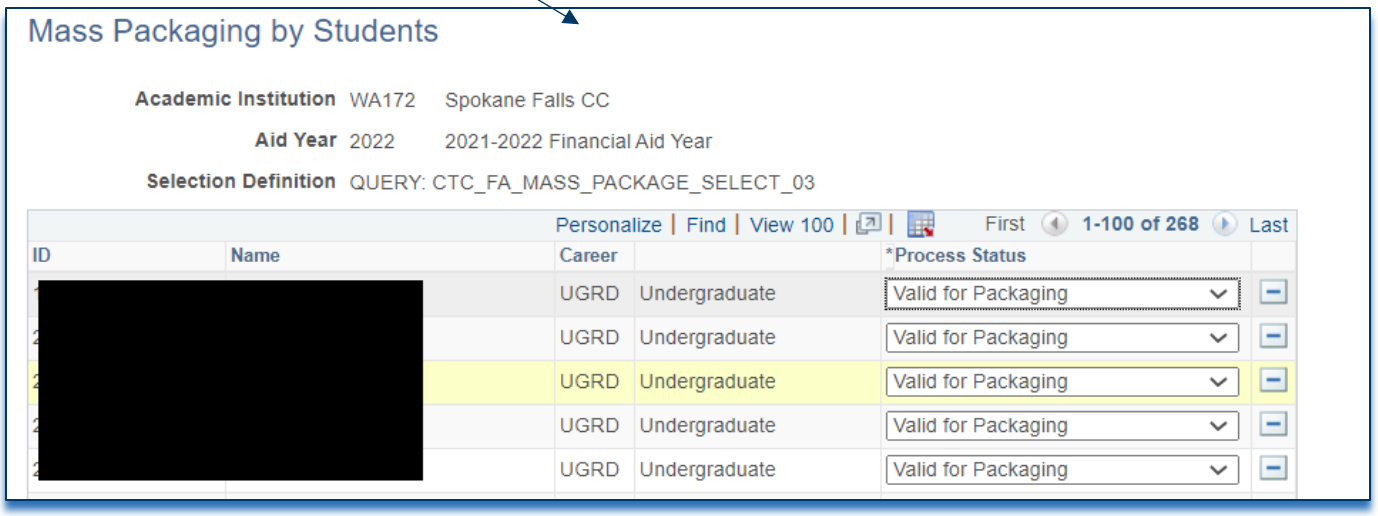
- **CTC_FA_MASS_PACKAGE_SELECT_01** selects students by CPS Process Date, or Current Date, SAP is Meets, does not have F04
- **CTC_FA_MASS_PACKAGE_SELECT_02** selects students by last completed FINA Requirements List checklist, SAP is Meets, does not have F04
- **CTC_FA_MASS_PACKAGE_SELECT_03** – selects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

MASS PACKAGING CONT'D

- STUDENT SELECTION AND REVIEW

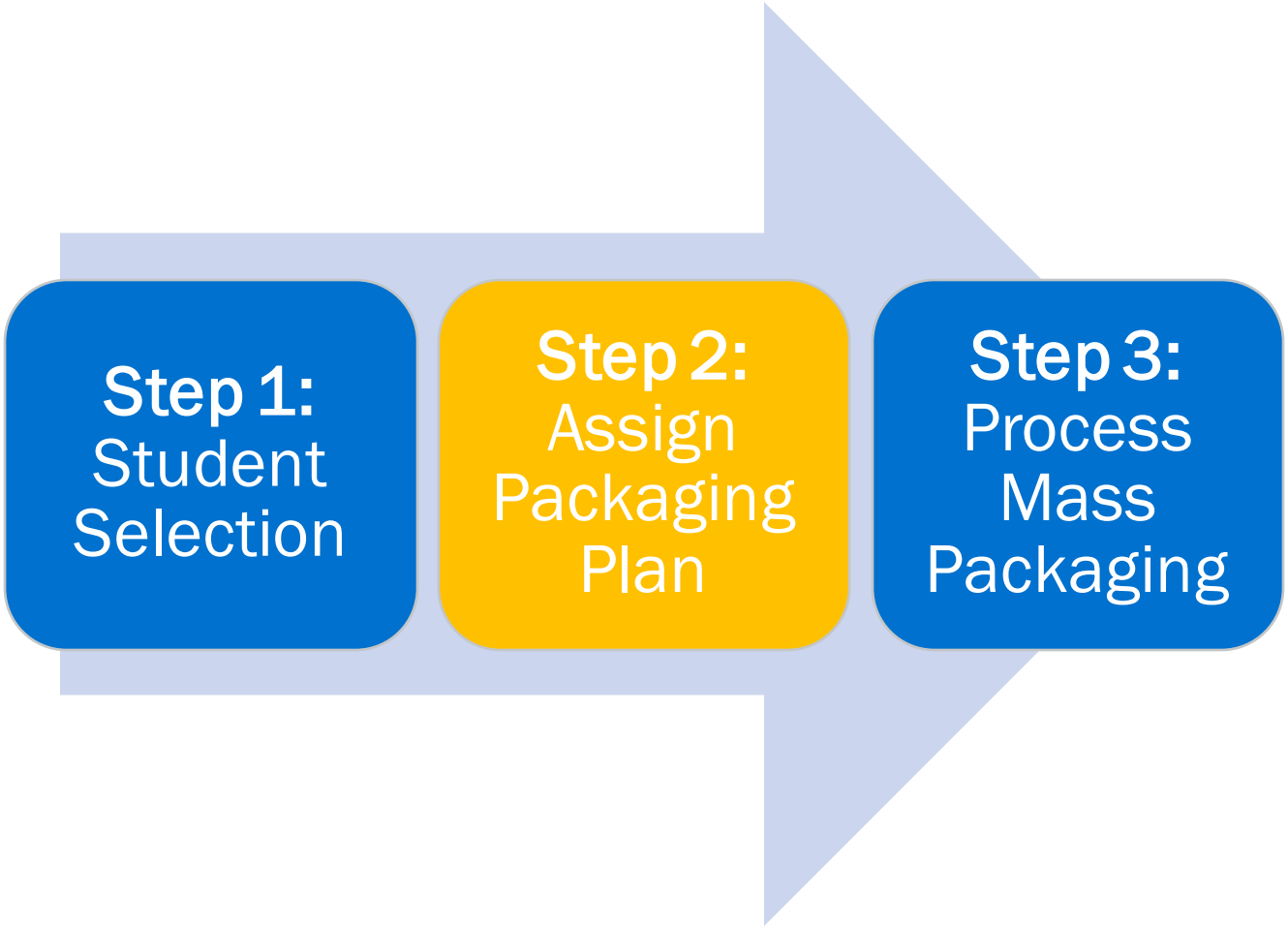
Navigation: Financial Aid > Awards > Mass Packaging > View Results by Students





MASS PACKAGING CONT'D

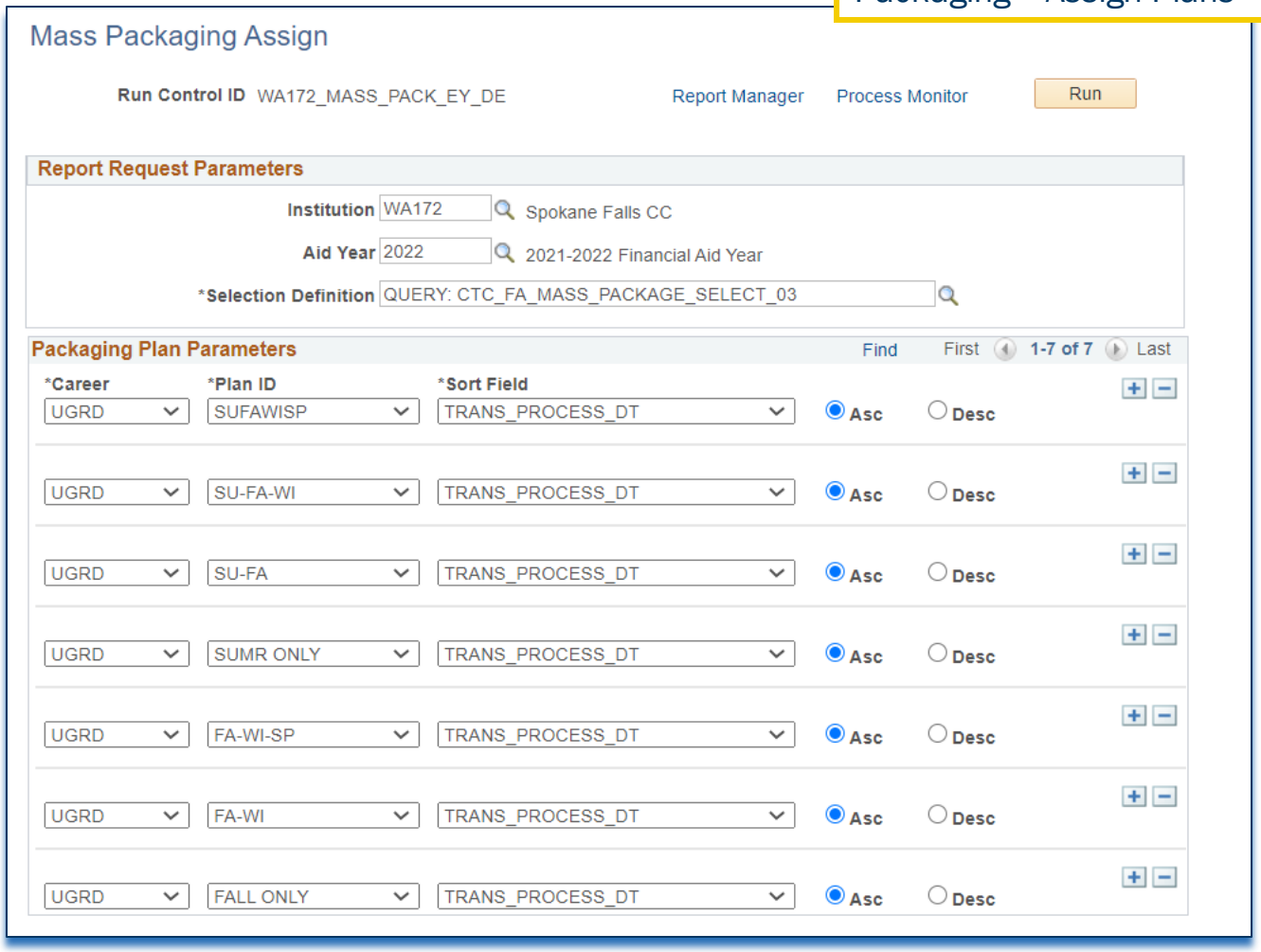
- ASSIGN AND REVIEW PACK PLAN RESULTS



MASS PACKAGING CONT'D

- ASSIGN AND REVIEW PACK PLAN RESULTS

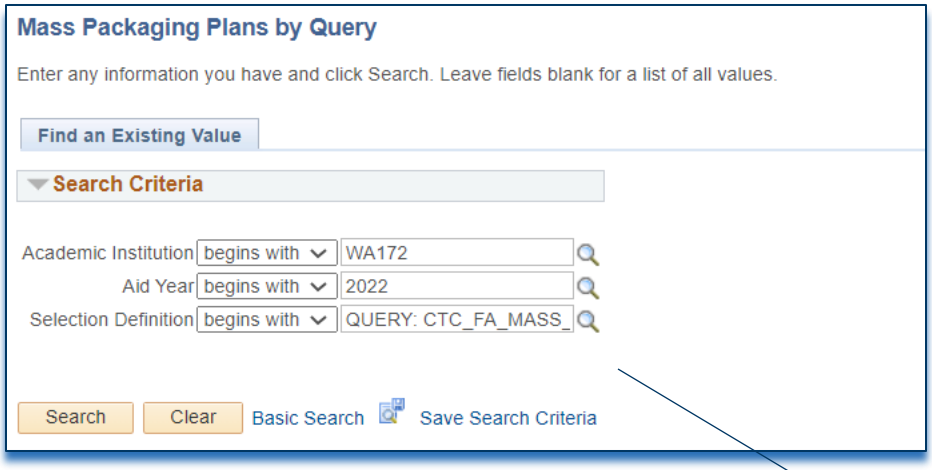
Navigation: Financial Aid > Awards > Mass Packaging > Assign Plans

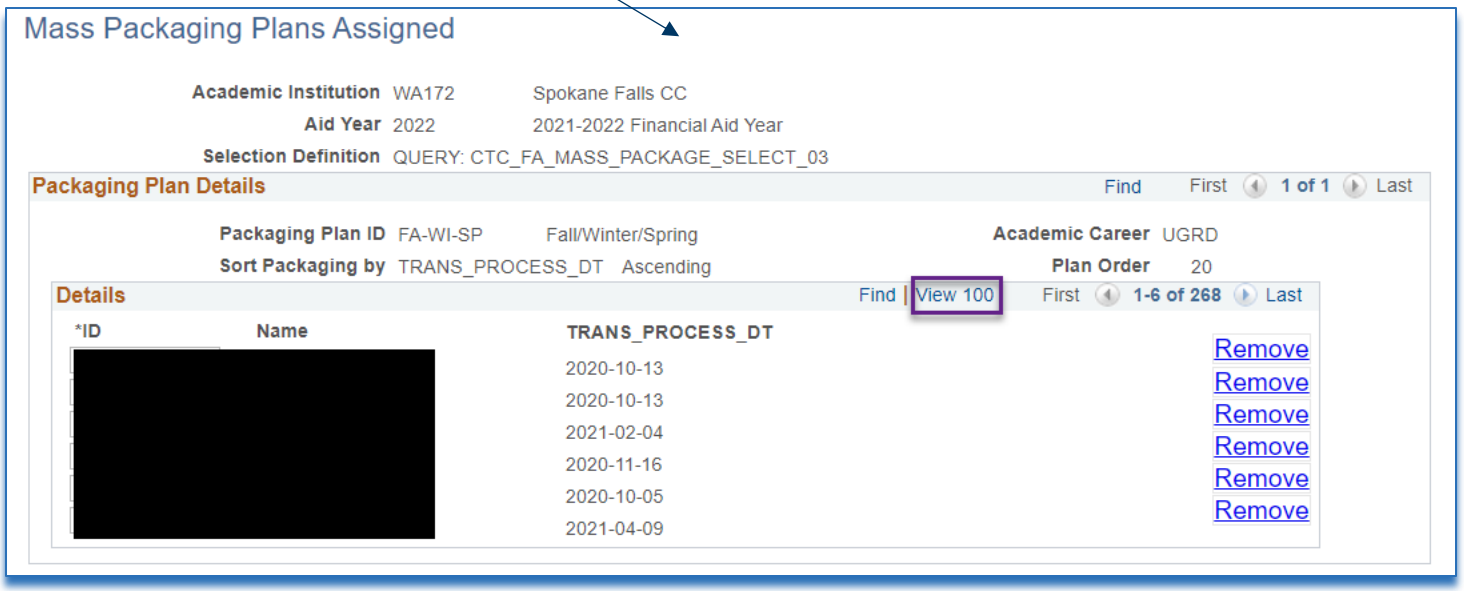


MASS PACKAGING CONT'D

- ASSIGN AND REVIEW PACK PLAN RESULTS

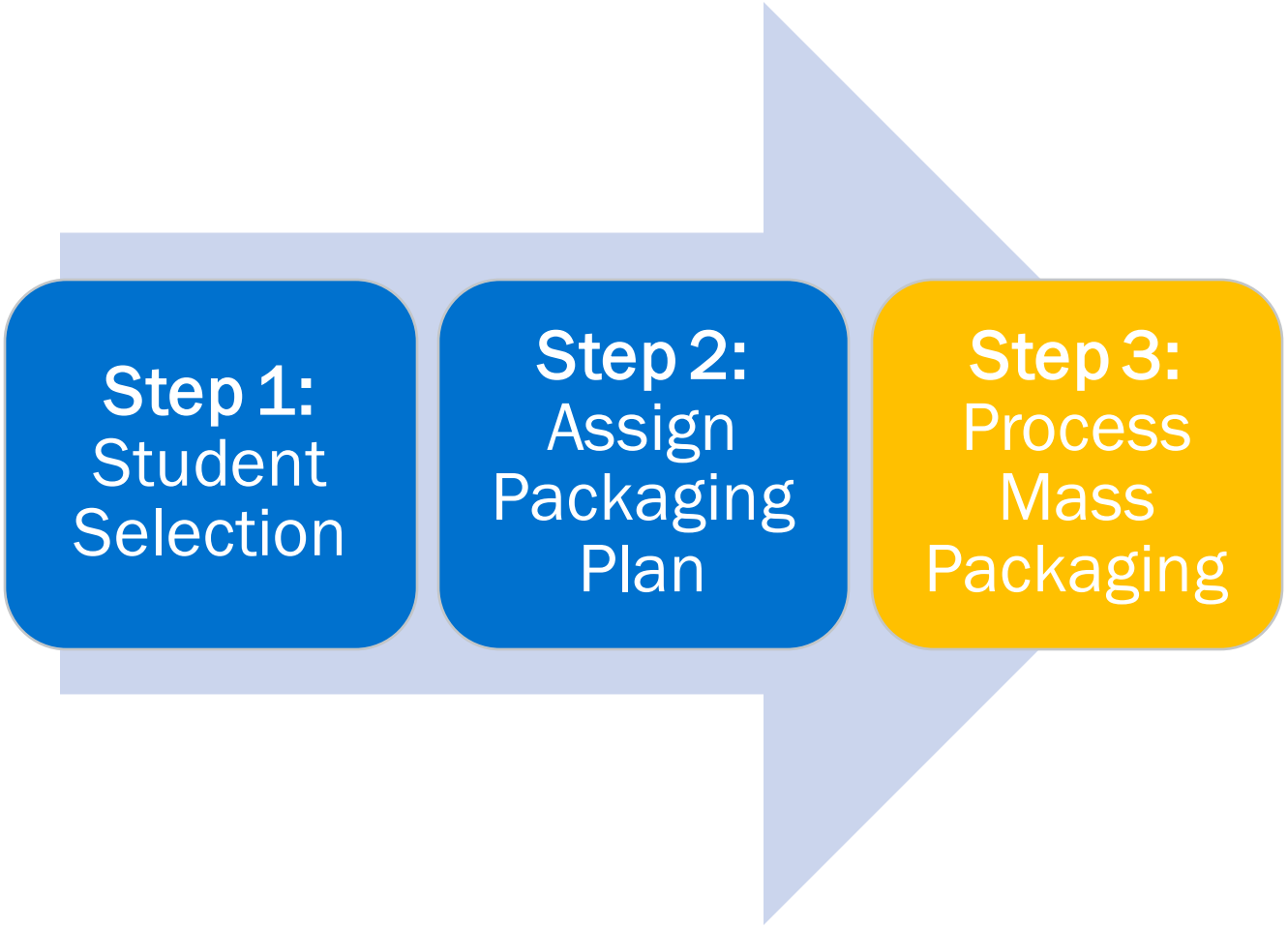
Navigation: Financial Aid > Awards > Mass Packaging > View Results by Query





MASS PACKAGING CONT'D

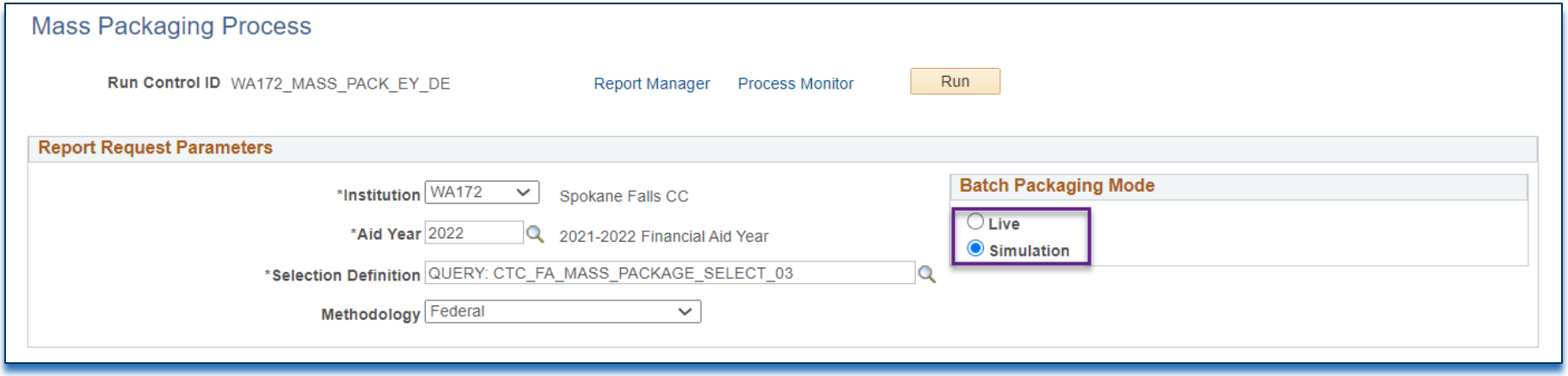
- PROCESS AWARDS FROM ASSIGNED PLANS



MASS PACKAGING CONT'D

- PROCESS AWARDS FROM ASSIGNED PLANS

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



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.

COMMUNITY AND TECHNICAL COLLEGES
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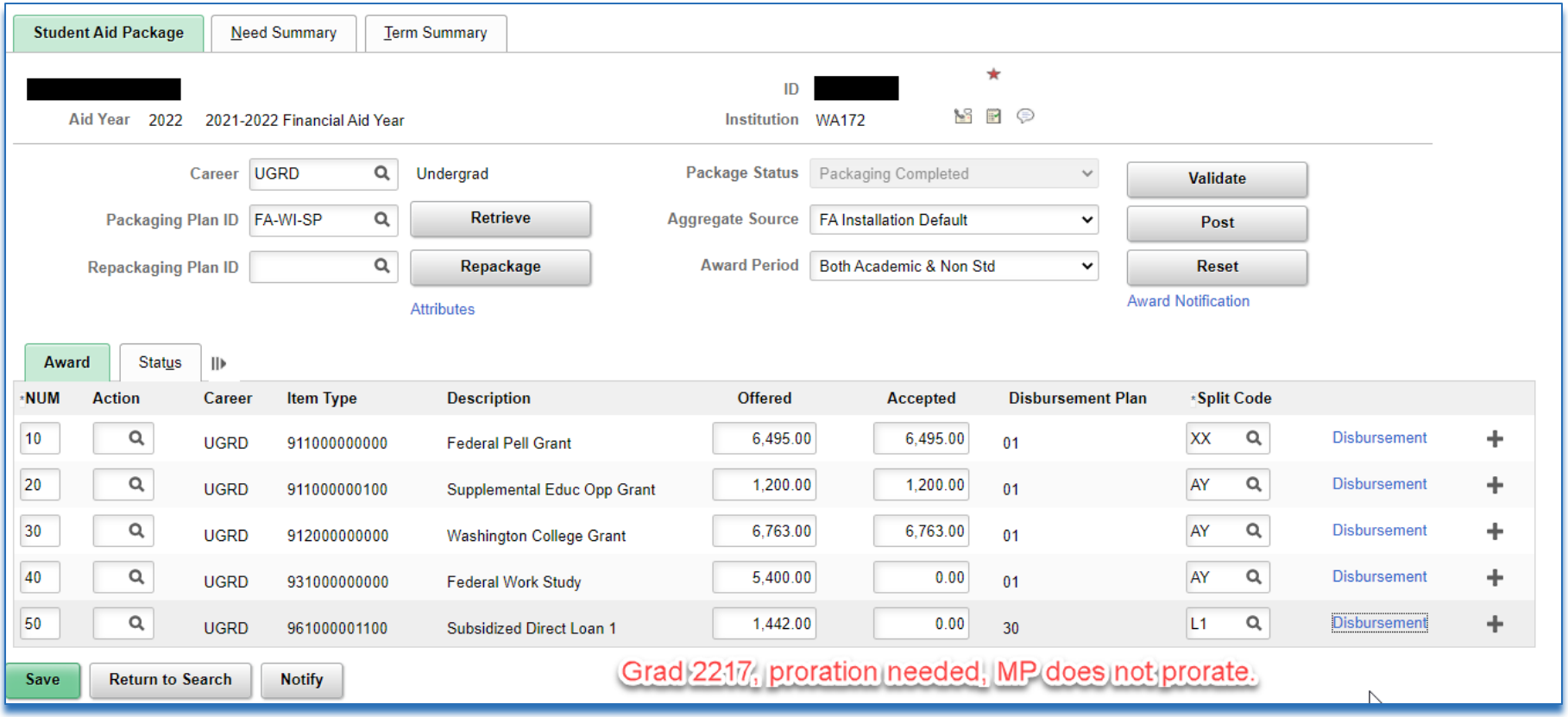
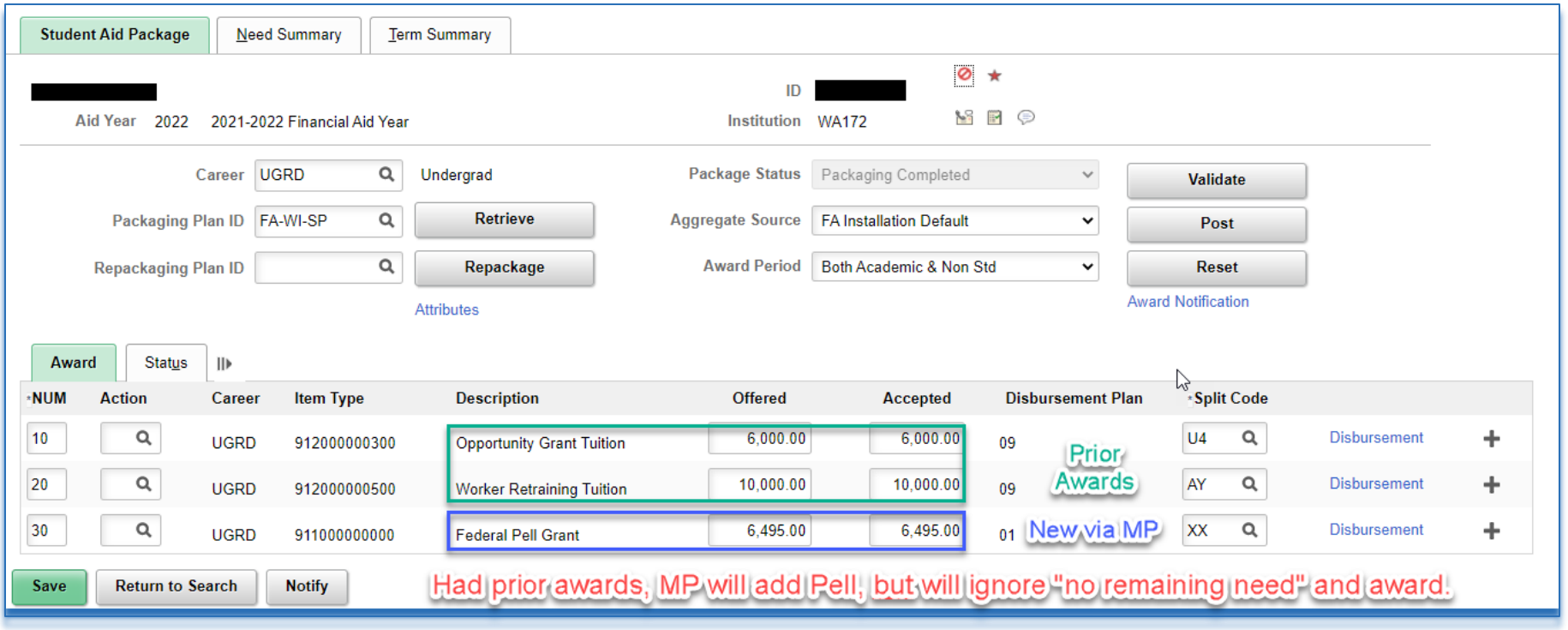
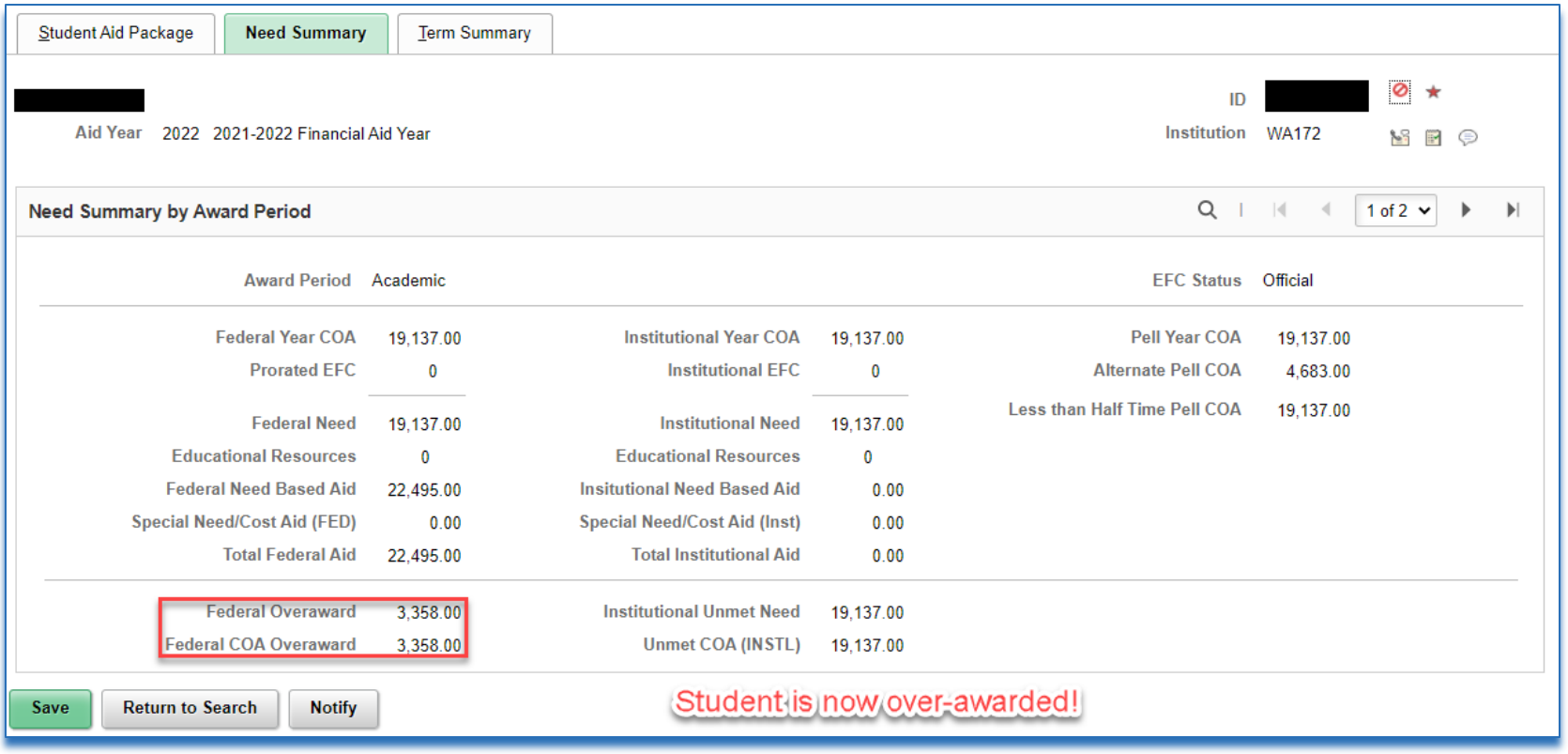



Student Aid Package
Need Summary
Term Summary
[redacted]
ID [redacted]
Aid Year 2022 2021-2022 Financial Aid Year
Institution WA172
Career UGRD Undergrad
Package Status Packaging Completed
Validate
Packaging Plan ID FA-WI-SP
Retrieve
Aggregate Source FA Installation Default
Post
Repackaging Plan ID
Repackage
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 UGRD 912000000300 Opportunity Grant Tuition 6,000.00 6,000.00 09 U4 Disbursement
20 UGRD 912000000500 Worker Retraining Tuition 10,000.00 10,000.00 09 AY Disbursement
30 UGRD 911000000000 Federal Pell Grant 6,495.00 6,495.00 01 XX Disbursement
Prior Awards
New via MP
Save
Return to Search
Notify
Had prior awards, MP will add Pell, but will ignore "no remaining need" and award.

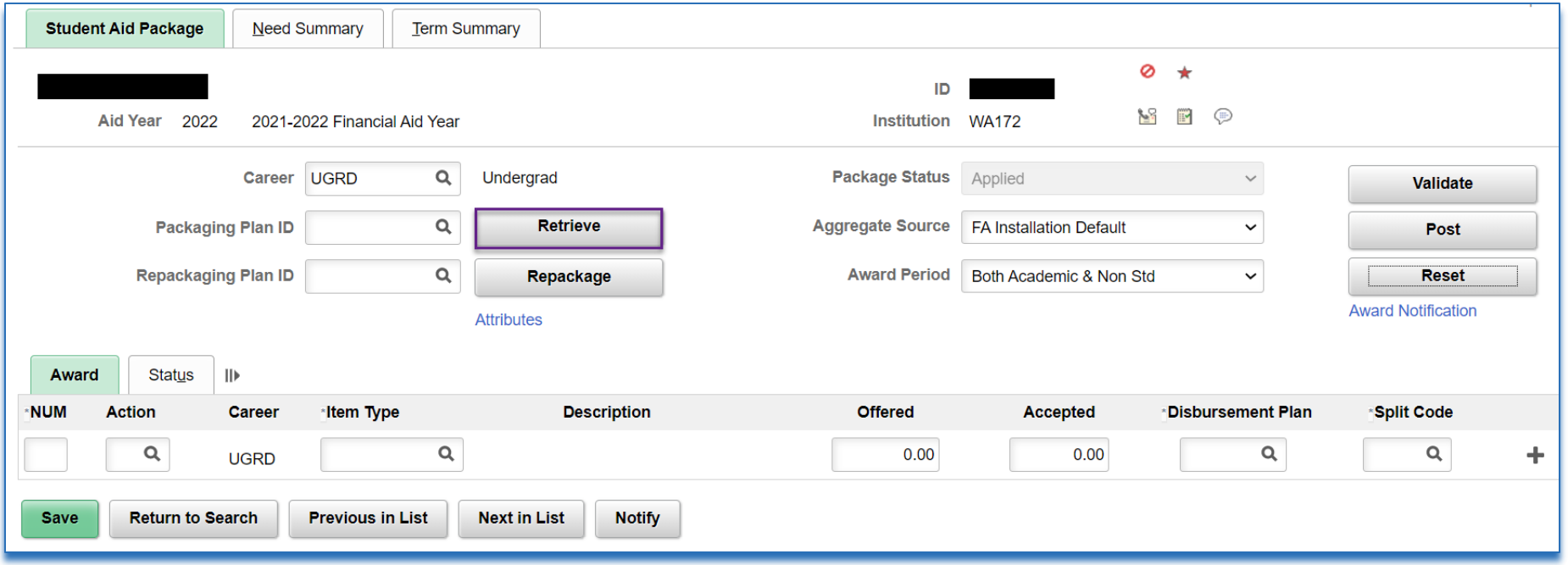

Student Aid Package
Need Summary
Term Summary
[redacted]
ID [redacted]
Aid Year 2022 2021-2022 Financial Aid Year
Institution WA172
Need Summary by Award Period
1 of 2
Award Period Academic
EFC Status Official
Federal Year COA 19,137.00
Prorated EFC 0
Federal Need 19,137.00
Educational Resources 0
Federal Need Based Aid 22,495.00
Special Need/Cost Aid (FED) 0.00
Total Federal Aid 22,495.00
Federal Overaward 3,358.00
Federal COA Overaward 3,358.00
Institutional Year COA 19,137.00
Institutional EFC 0
Institutional Need 19,137.00
Educational Resources 0
Insitutional Need Based Aid 0.00
Special Need/Cost Aid (Inst) 0.00
Total Institutional Aid 0.00
Institutional Unmet Need 19,137.00
Unmet COA (INSTL) 19,137.00
Pell Year COA 19,137.00
Alternate Pell COA 4,683.00
Less than Half Time Pell COA 19,137.00
Save
Return to Search
Notify
Student is now over-awarded!

ONLINE PACKAGING

ONLINE PACKAGING

- RETRIEVE PACK PLAN ID

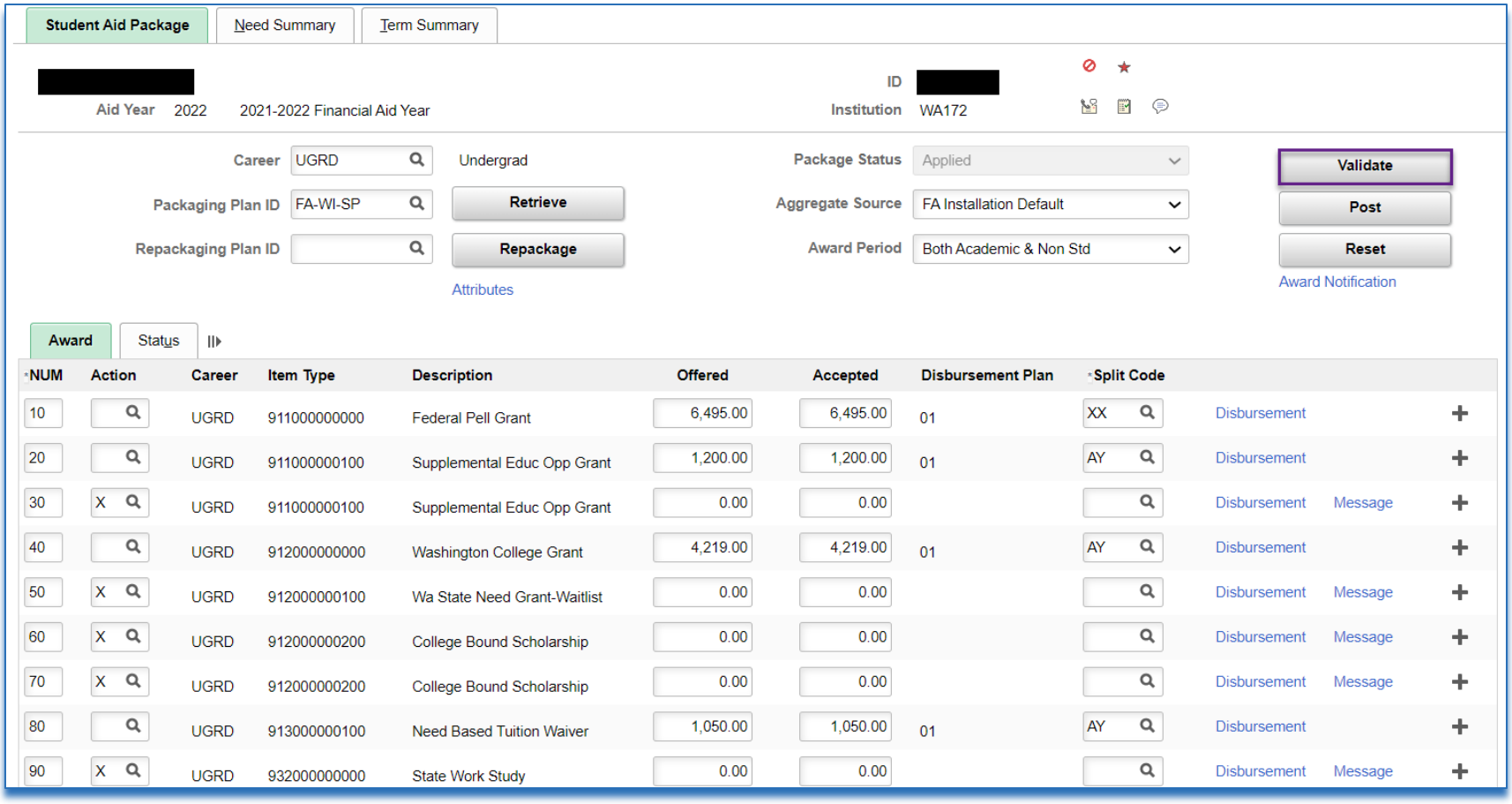
Navigation: Nav Bar > Navigator > Financial Aid > Awards > Award Processing > Assign Awards to a Student



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

ONLINE PACKAGING

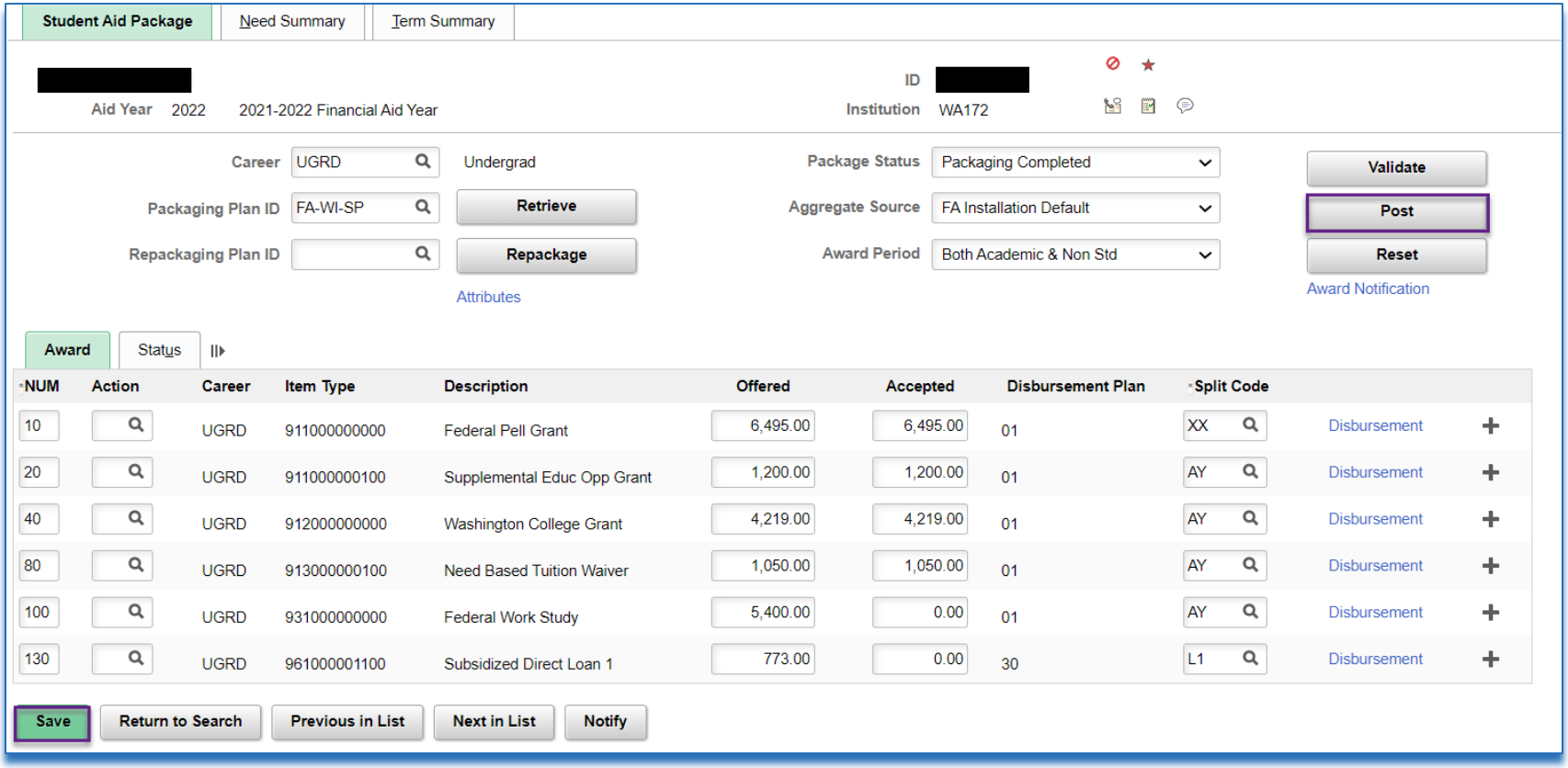
- REVIEW AID THEN CLICK VALIDATE



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.

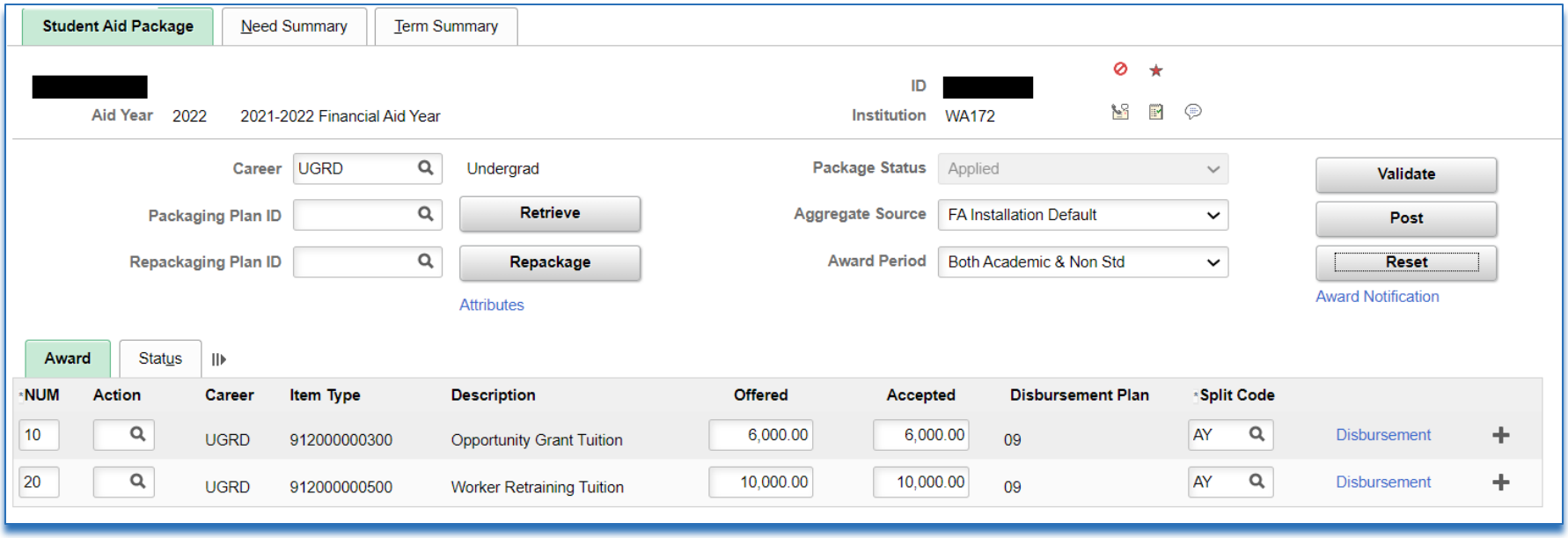
ONLINE PACKAGING

- REVIEW AID THEN CLICK VALIDATE



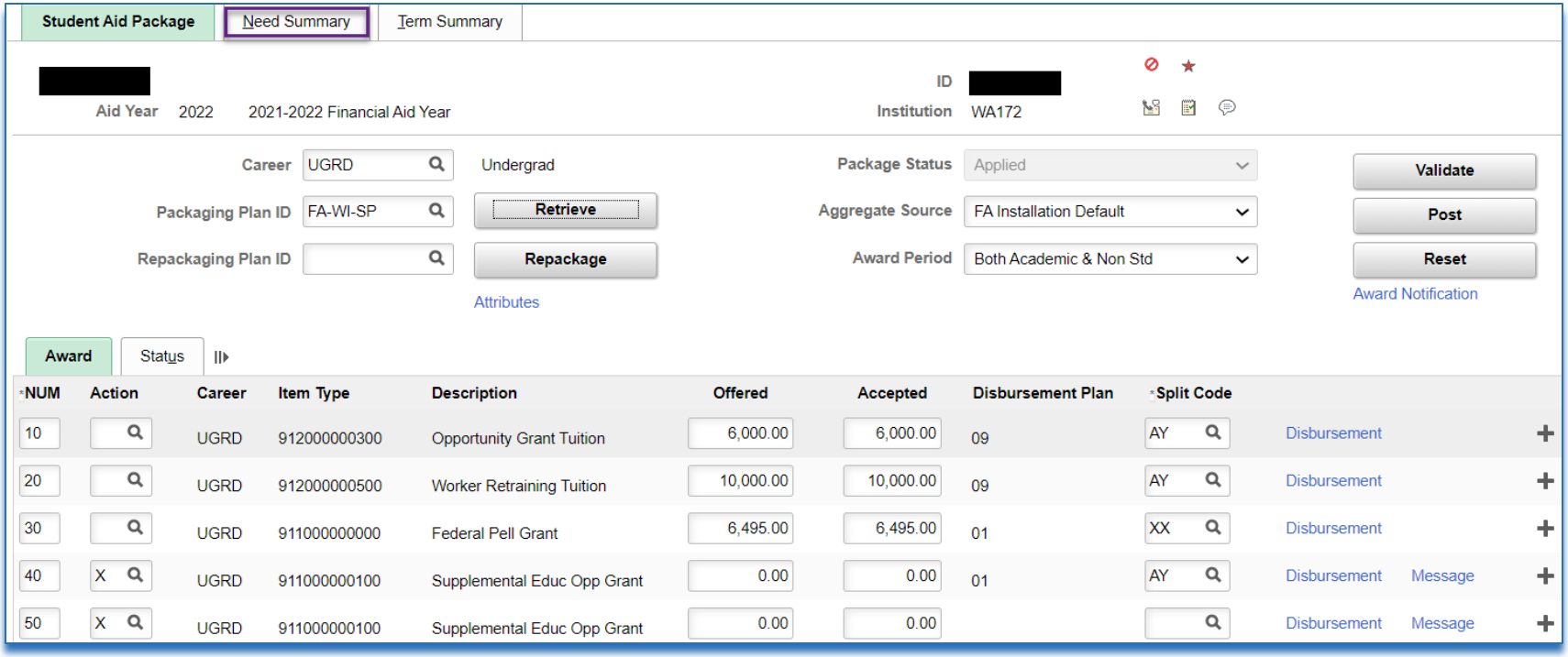
After clicking **Post**, make sure to click **Save**.

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



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.



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Student Aid Package | **Need Summary** | Term Summary

[redacted]

Aid Year 2022 2021-2022 Financial Aid Year

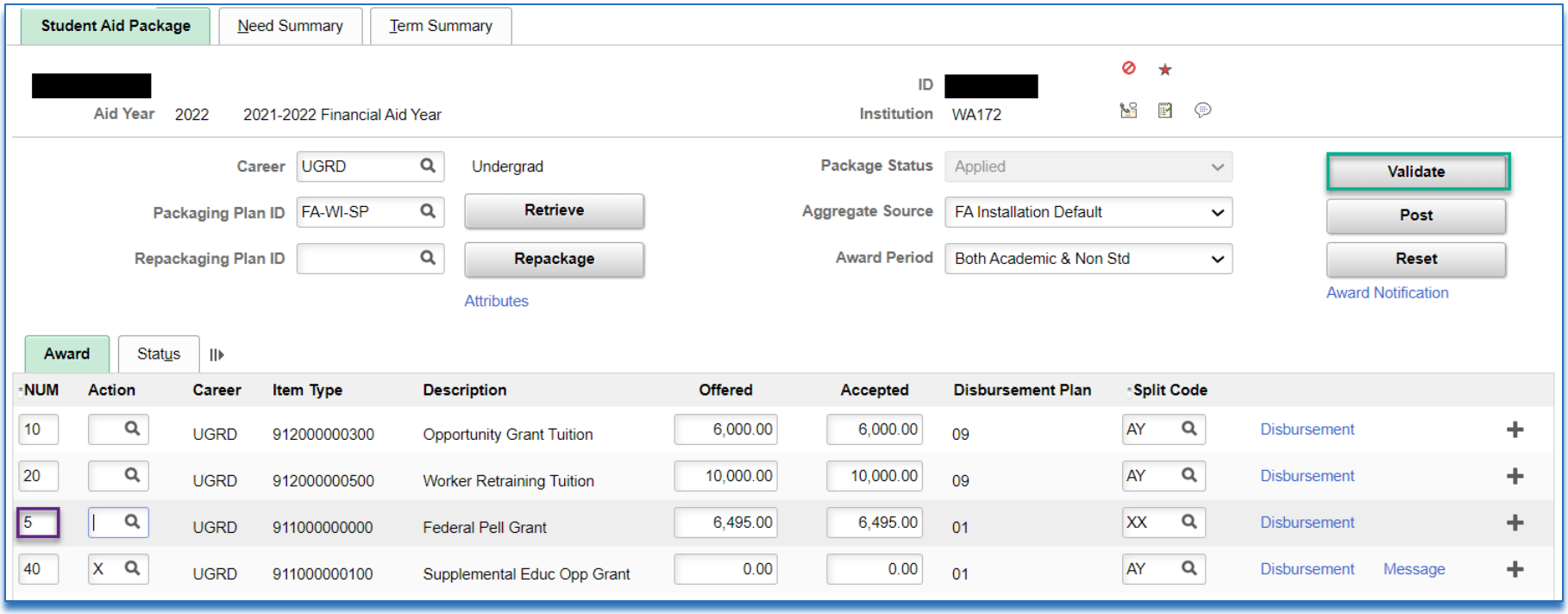
ID [redacted]

Institution WA172

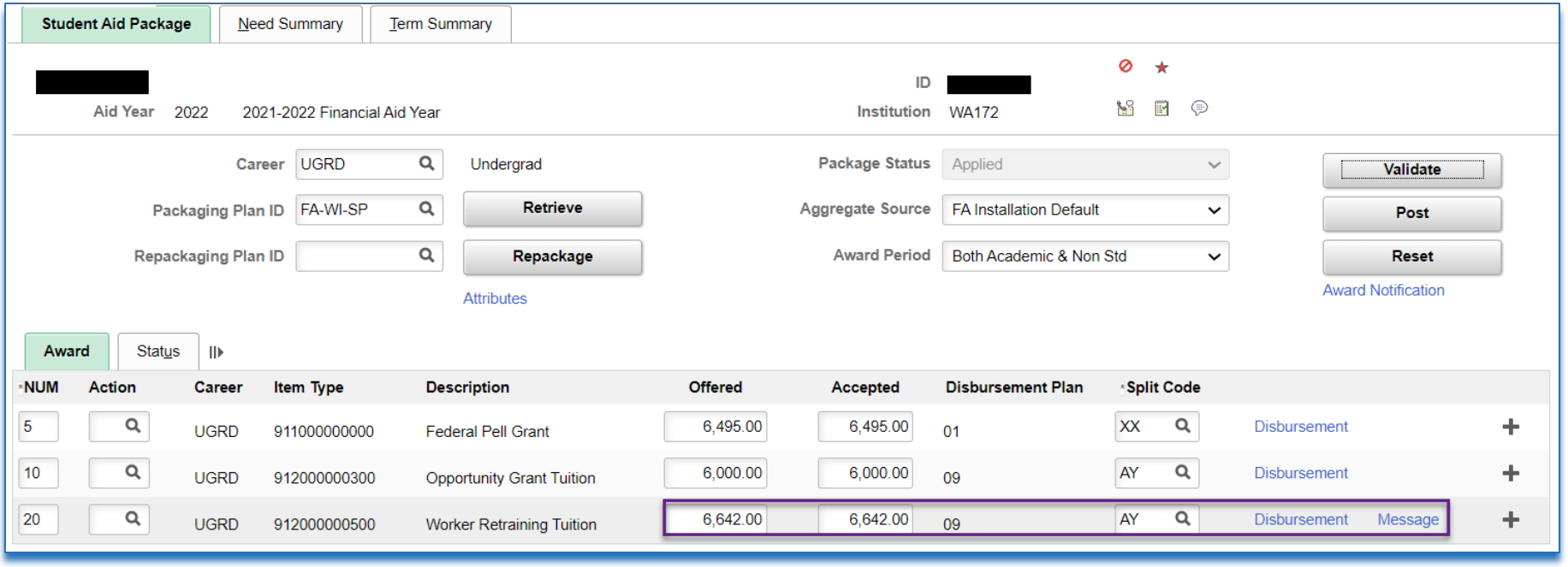
Need Summary by Award Period 1 of 2

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	Insitutional 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.**



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



Q&A TIME

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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

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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!

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