ASSIGN, POP THEN WAIVE Process for V1

This process is designed to find the V1 checklists assigned by the ISIR that are still in Initiated status so that their *Packaging Status Summary* can be updated and V1 checklist can be waived with a standard comment.

**Outline of steps in this guide**

* Data Cleanup of Institutionally Selected V1 Students (One Time Only)
* Set Up the Run Control IDs for the Assign V1 Checklist Process
* Set Up the Run Control ID for the Pop-Update Process
* Set Up the Components for the Waive Process
* Run the ASSIGN, POP THEN WAIVE Process
  + Assign V1 Checklists
  + Pop-Update Packaging Status Summary Pages
  + Waive Checklists
* OPTIONAL: Only needed for colleges that also assign Fxx025, Fxx027, Fxx034 and/or any other V1 related checklists, there is a one-time waive process at the end of this document. (One Time Only)

**Remove the Run Control IDs that assigns all V1 related checklists in Initiated status from the ISIR Jobset so that you can run it ad-hoc every morning before running the pop-update and waive process.** If you leave it on your ISIR Jobset, students will get the To-Do communications at night only for you to pop-update and waive in the morning.

Timing of when to run the ASSIGN, POP THEN WAIVE Process

Colleges should run this 3-step processany morning your staff will be reviewing files.

**Make sure to run the pop-update before the waive.** If you run the waive first, then the students will not show up to pop-update.

\*\*\*This process is not needed for every aid year moving forward so it will not be added to the ISIR Jobset for colleges, however, the last thing in the guide are steps to creating a mini job dedicated to this process\*\*\*

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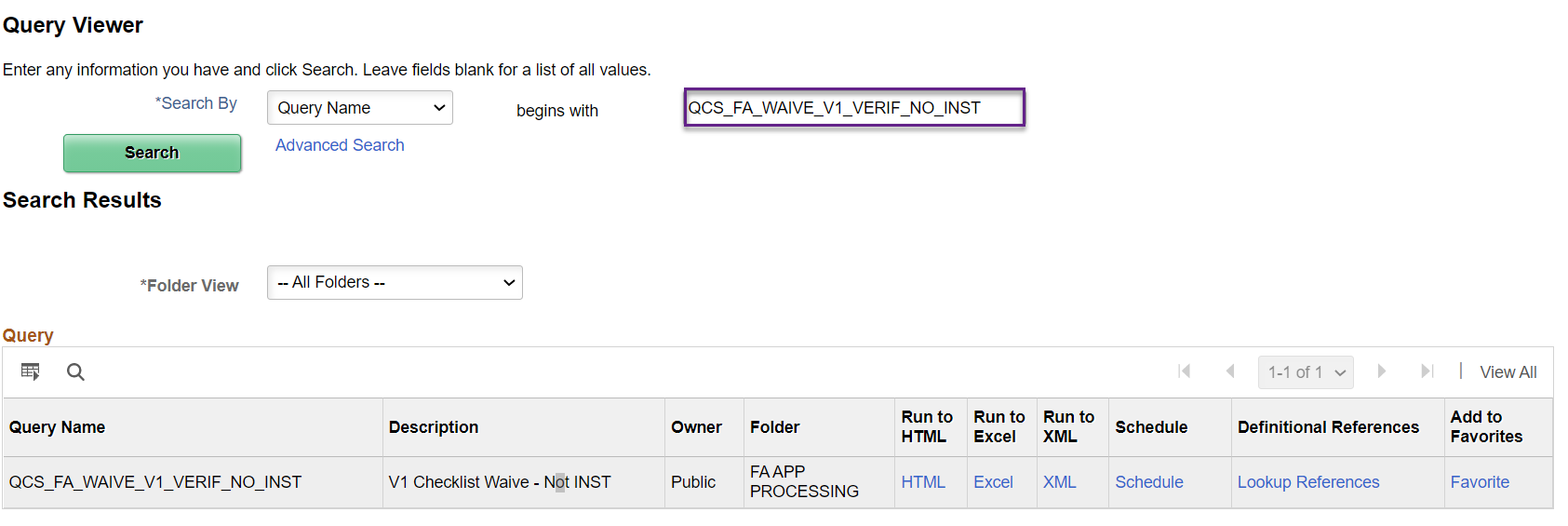
## **Data Cleanup of Institutionally Selected V1 students (ONE TIME ONLY)**

For this to be a one-time clean up, moving forward, when you institutionally select a student for verification, make sure to code the **Packaging Status Summary** page to **INST Verification Status** = **Selected for Verification**.

Find and clean up students who you’ve selected for verification and added the V1 checklist to but did not set the ***Packaging Status Summary*** page to **INST Verification Status** to **Selected for Verification**

1. **Go to Query Viewer and search for *QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST***

Navigation: Reporting Tools > Query > Query Viewer



1. **Download a spreadsheet of the population that will be updated with this new process**

Click on HTML, EXCEL or Schedule (if your college is a big school) and save the results

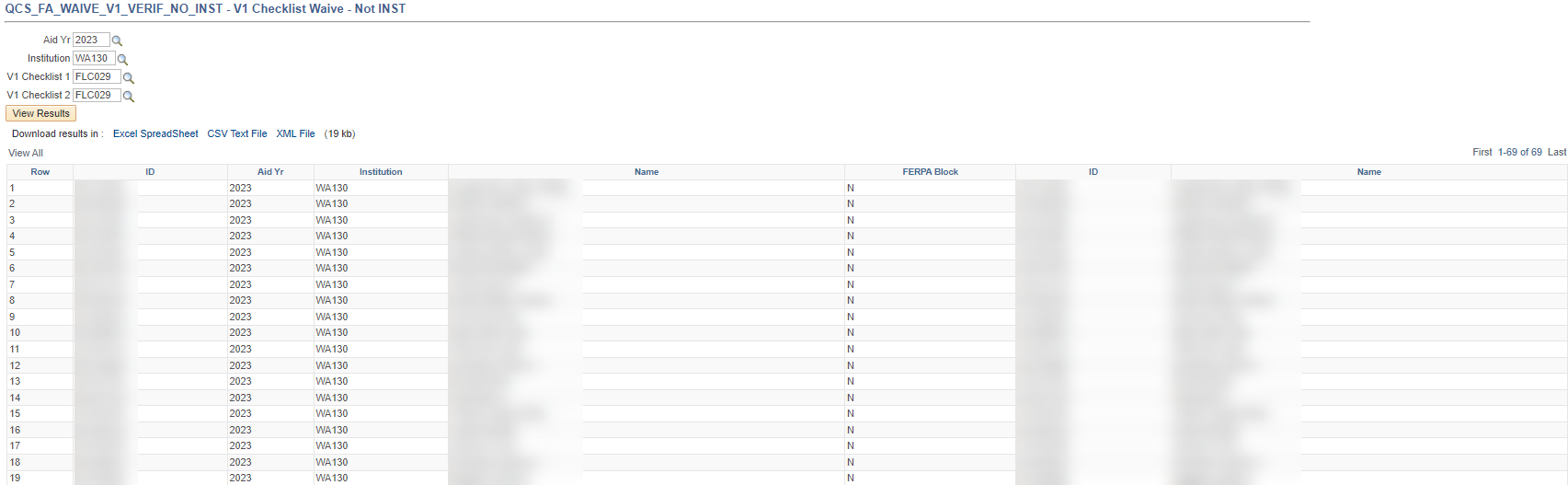
**Query prompts**

**Aid Yr:** 2023

**Institution:** WAxxx (i.e. WA130)

**V1 Checklist 1:** Fxx029 (i.e. FLC029)

**V1 Checklist 2:** Colleges that have separated their V1 population into dependent versus independent will put their Fxx185 here. Everyone else will put Fxx029 again.



1. **Run the V1 queries (*CTC\_FA\_SB\_AD\_V1\_D*and *CTC\_FA\_SB\_AD\_V1\_I)* and download the results.**

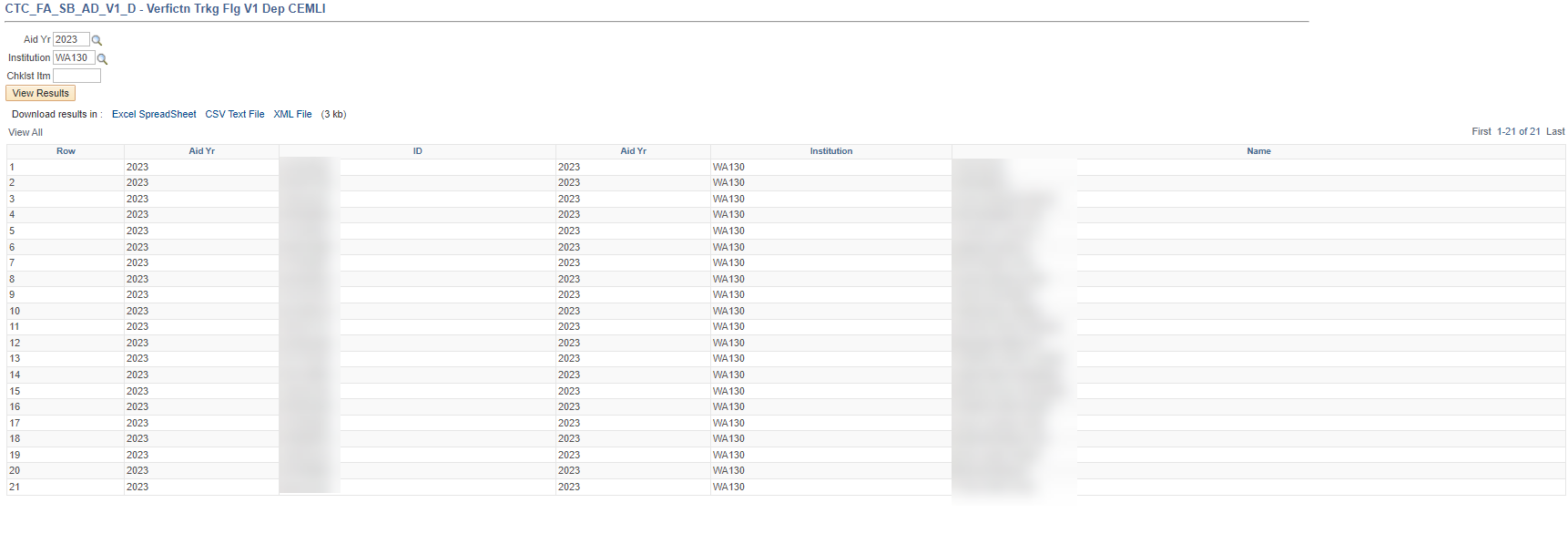
Click on HTML, EXCEL or Schedule (if your college is a big school) and save the results

**Query prompts**

**Aid Yr:** 2023

**Institution:** WAxxx (i.e. WA130)

**Checklist:** Leave blank or enter 000000

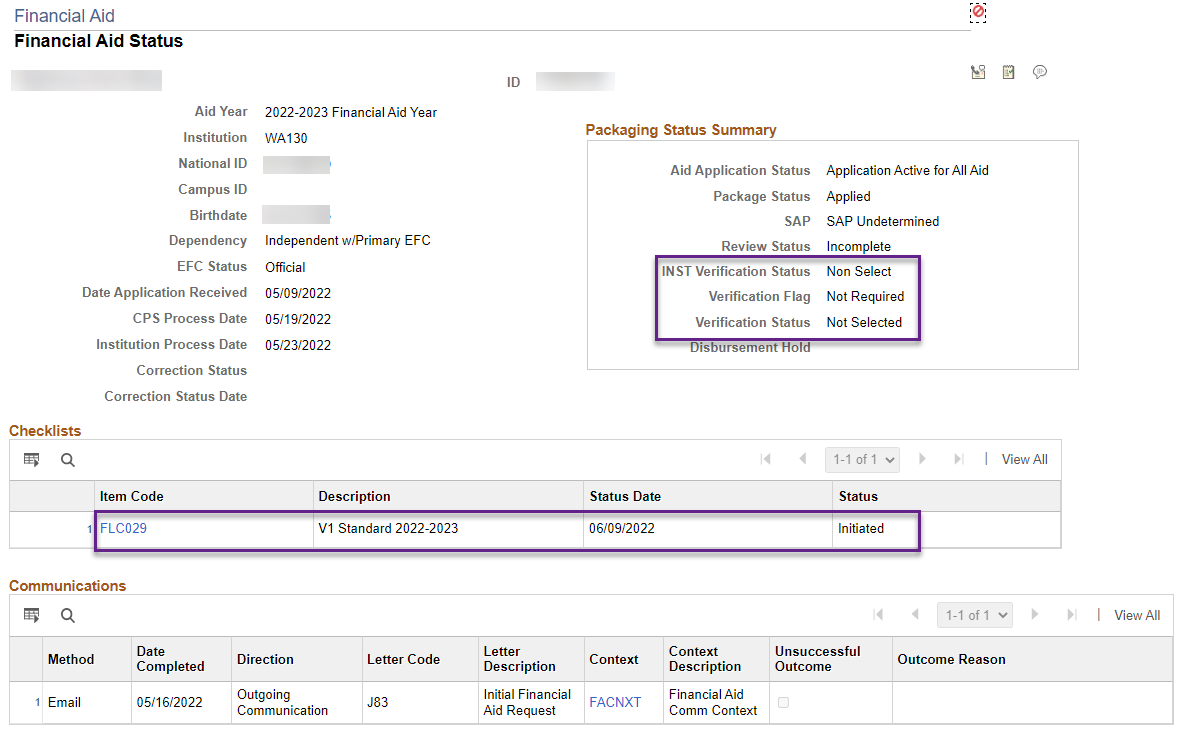


If you combine the results from both V1 queries, you will get the students who have V1 flag on their ISIR

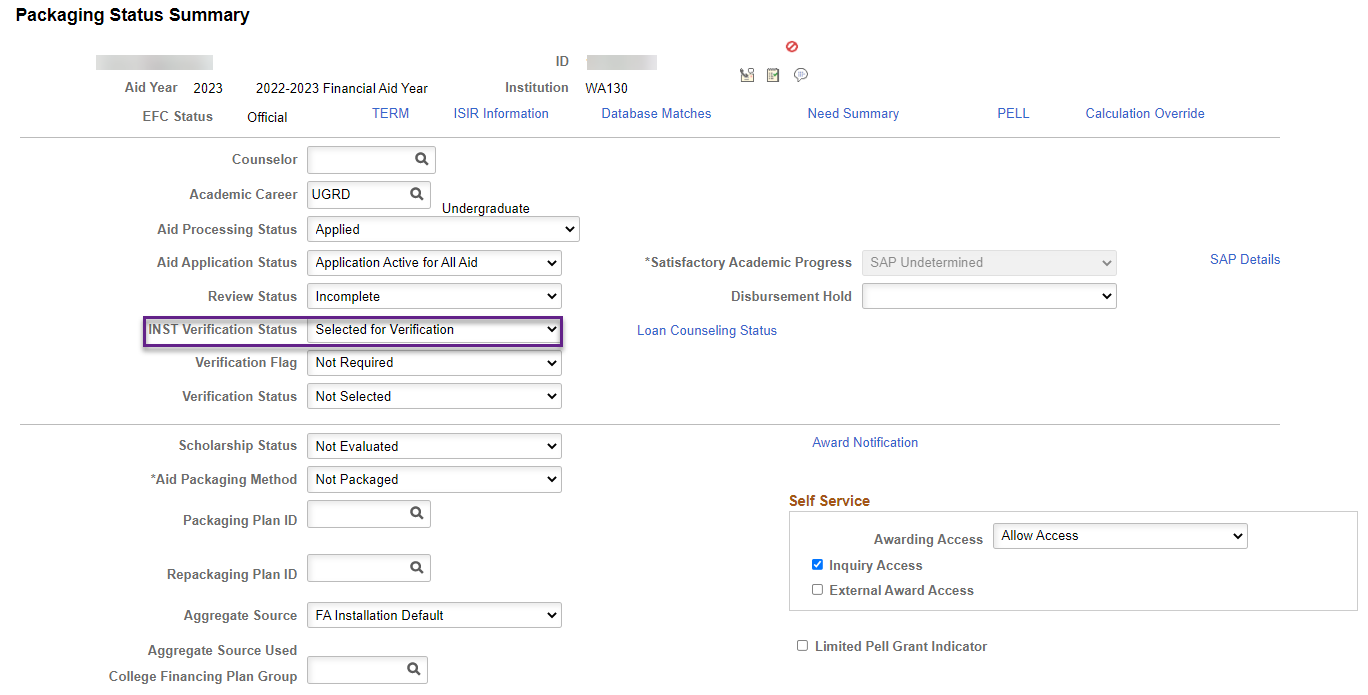
1. **Compare the results from *QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST* with the V1 list you created in the previous step**

Anyone that you see is on the *QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST* results but not on the V1 list is a student who was selected for V1 by your college and the **Packaging Status Summary** page needs to be updated so their V1 checklist does not get waived.

Below is an example of what the student’s *Financial Aid Status* screen may look like.



On the **Packaging Status Summary** page, flip the **INST Verification Status** to **Selected for Verification** then the student’s V1 checklist will not be waived when you run the waive process.



## **Set Up Run Control IDs for the Assign V1 Checklist Process** (if you don’t have them already)

Navigation: Campus Community > 3C Engine > Run 3C Engine

**Per usual, make sure to put your college and initials in the Run Control ID name so that your Run Control ID is unique in the system.**

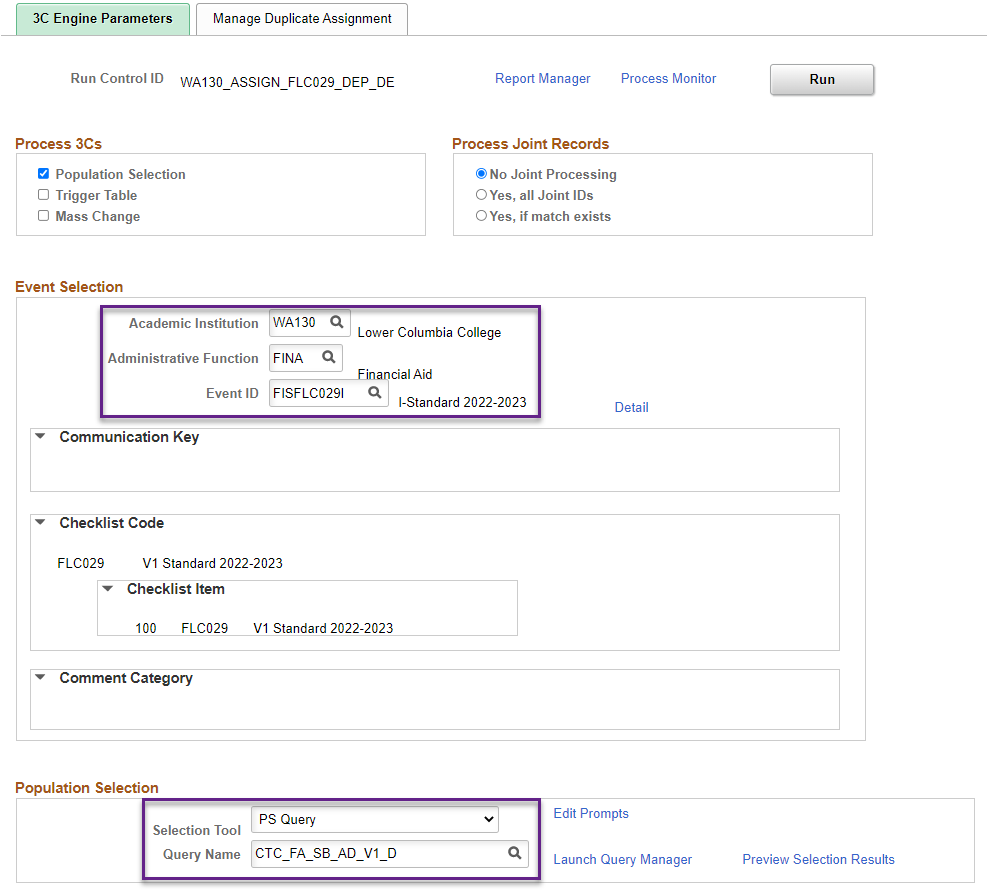
You will need two V1 assignment Run Control IDs: One for V1 dependents and one for V1 independents. This example is for the V1 dependent Run Control ID as indicated by the word “DEP” in the Run Control ID name.

Select **Population Selection** and enter the following prompts in the *Event Selection* section then click tab on your keyboard. The checklist and comment should populate.

**Academic Institution:** WAxxx

**Administrative Function:** FINA

**Event ID:** FISFxx029I (i.e. FISFLC029I)



For *Populations Selection*, choose **PS Query** and **CTC\_FA\_SB\_AD\_V1\_D**

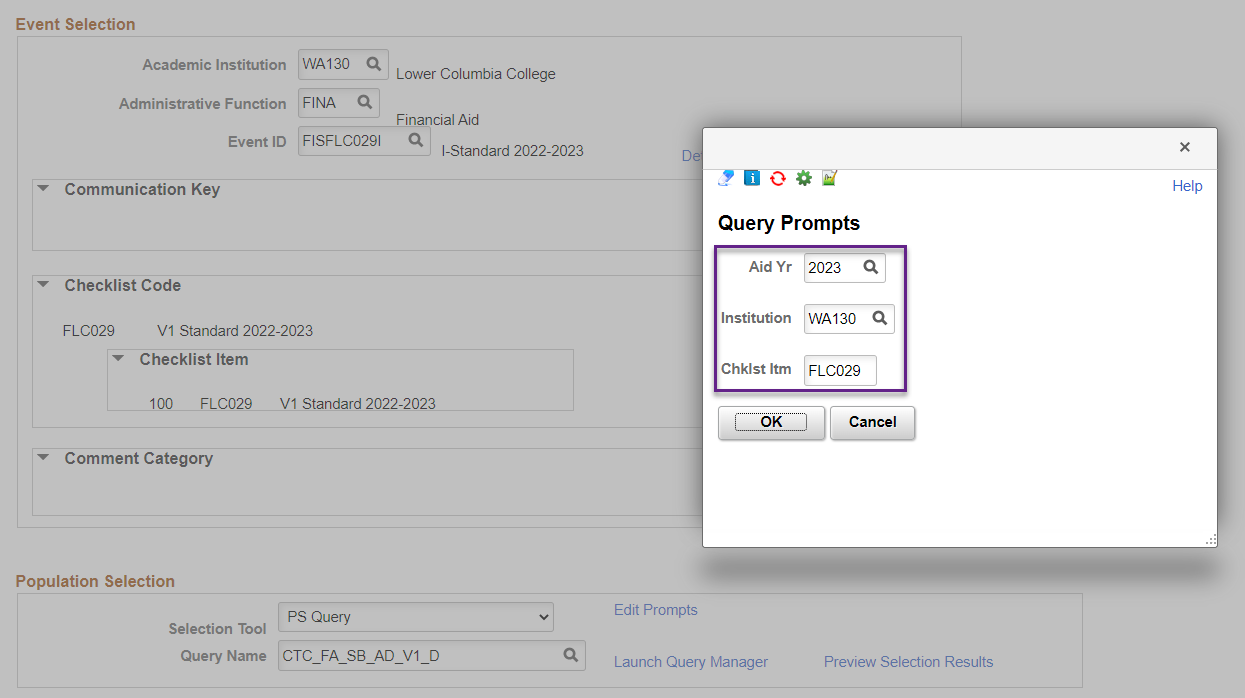
**Query prompts**

**Aid Yr:** 2023

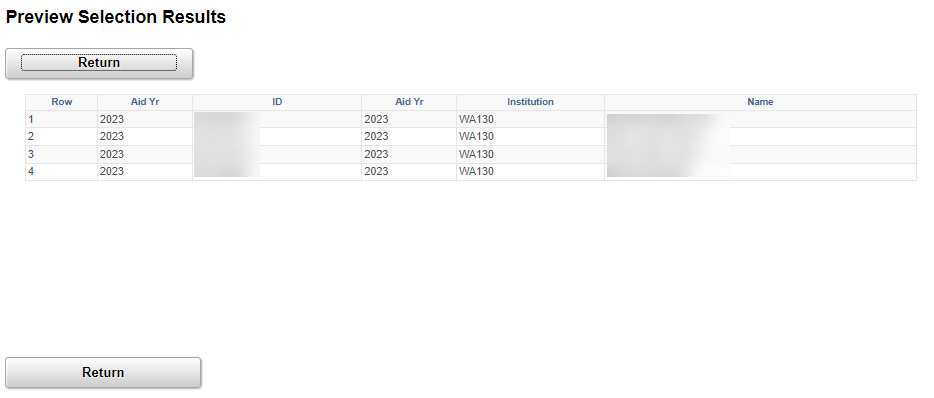
**Institution:** WAxxx (i.e. WA130)

**Chklst Itm:** Fxx029 (i.e. FLC029)

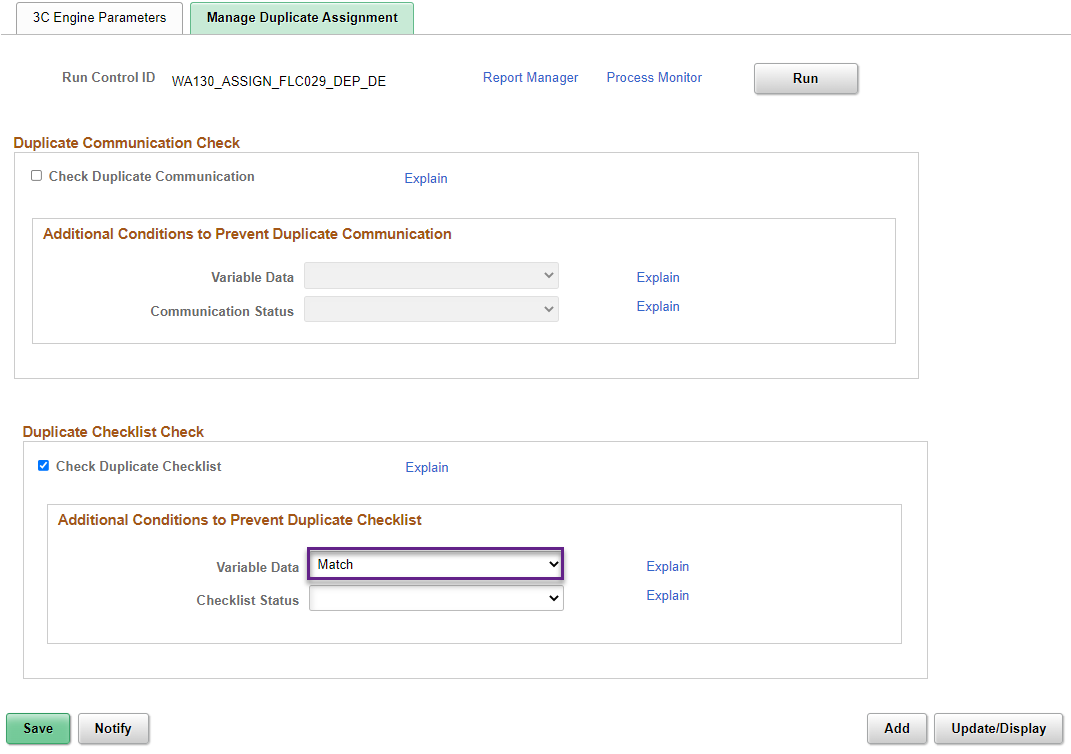
\*\*Some colleges have two V1 checklists so they may enter Fx185 depending on which checklist they use for V1 dependents\*\*



Click on **Preview Selection Results** to confirm the parameters you entered picked up the right students then click **Return**.



Go to *Manage Duplicate Assignment* tab, keep **Check Duplicate Checklist** checkbox checked and select ‘**Match**’ for *Variable Data*



Click **Save** then exit.

**\*\*Repeat the same steps to create the V1 checklist assignment Run Control ID for V1 independent students. The query is CTC\_FA\_SB\_AD\_V1\_I\*\***

## **Set Up Run Control ID for the Pop-Update Process**

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

**Per usual, make sure to put your college and initials in the Run Control ID name so that your Run Control ID is unique in the system.**

Select the following parameters

**Record (Table) Name:** STDNT\_AID\_ATRBT – Packaging Status Summary

**Institution:** WAxxx (i.e. WA130)

**Aid Year**: 2023

**Selection Tool:** PS Query

**Query Name:** QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST

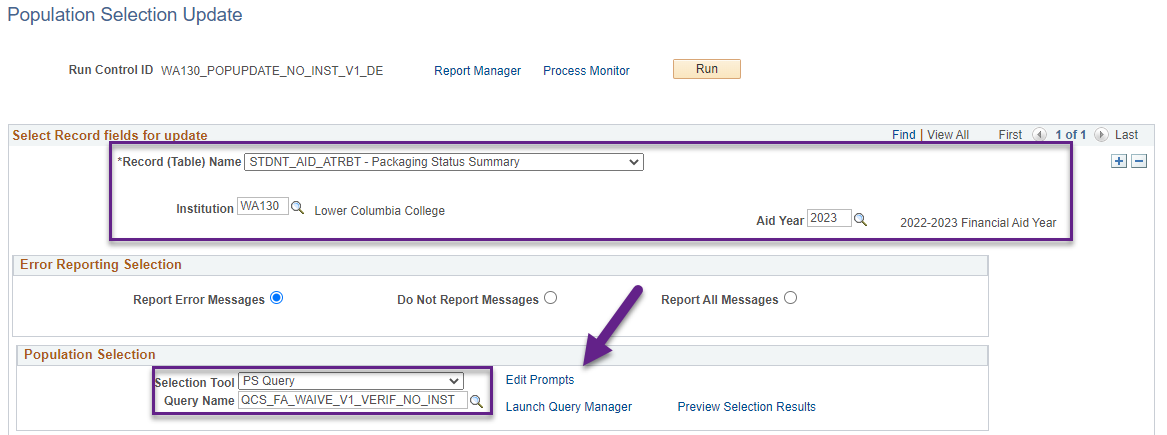
**Query prompts**

**Aid Yr:** 2023

**Institution:** WAxxx (i.e. WA130)

**V1 Checklist 1:** Fxx029 (i.e. FLC029)

**V1 Checklist 2:** Colleges that have separated their V1 population into dependent versus independent will put their Fxx185 here. Everyone else will put Fxx029 again.

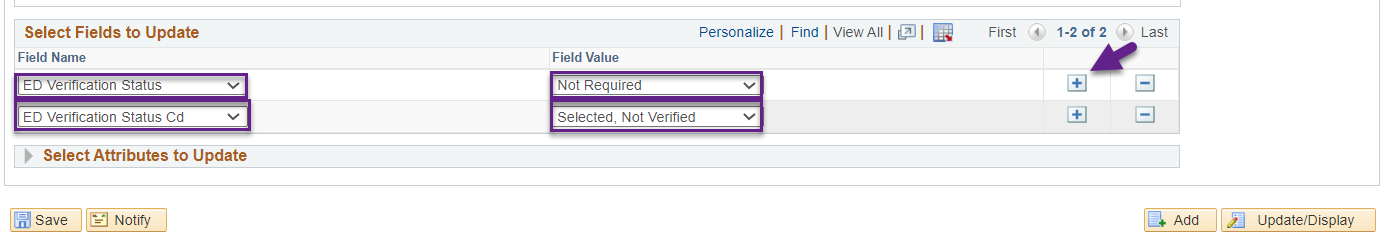




For the *Select Fields to Update*, you will need two rows so add a second row by clicking the plus button and carefully select the following.

**Field Name:** ED Verification Status **Field Value:** Not Required

**Field Name:** ED Verification Status Cd **Field Value:** Selected, Not Verified



Click **Save** then exit.

## **Create a 3C Engine Run Control ID tied to FISFxxV1FW Event ID**

Navigation: Campus Community > 3C Engine > Run 3C Engine

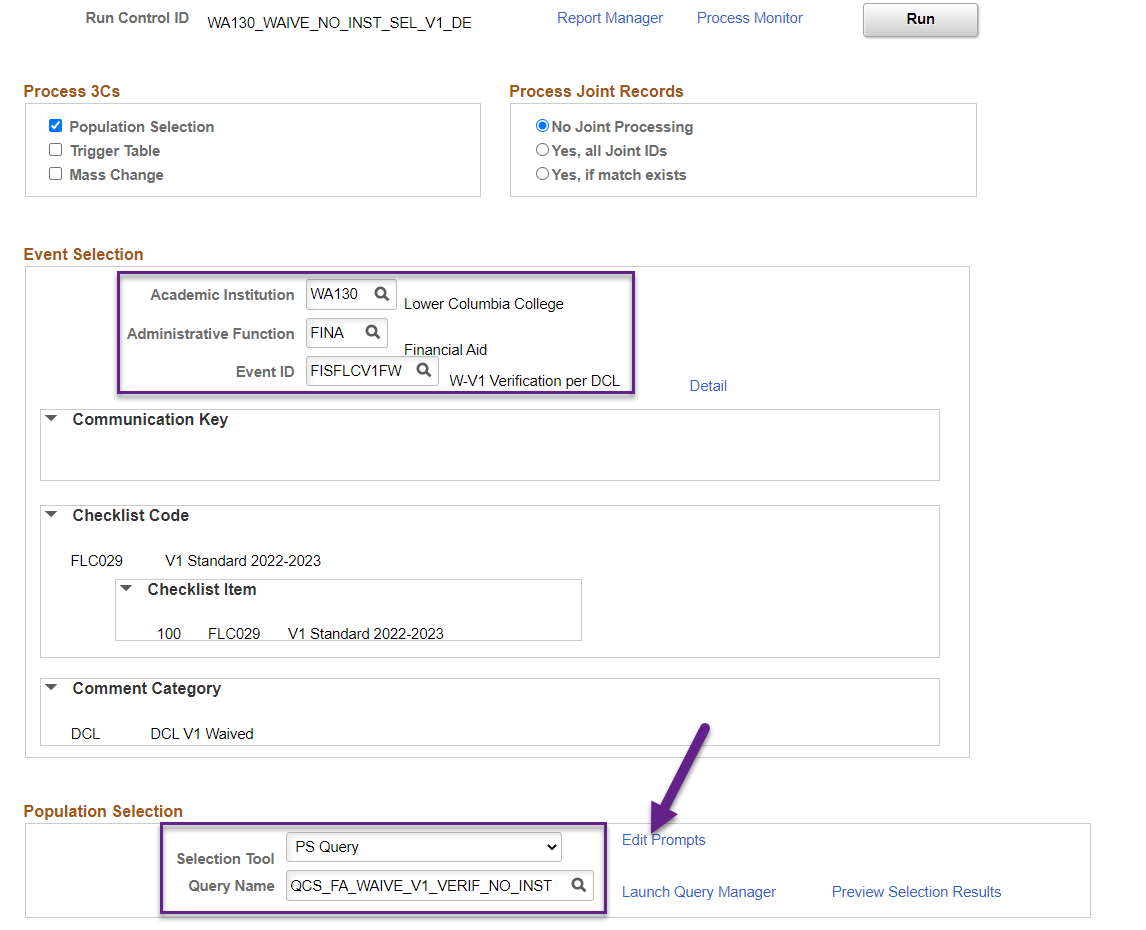
**Per usual, make sure to put your college and initials in the Run Control ID name so that your Run Control ID is unique in the system.**

Select **Population Selection** and enter the following prompts in the *Event Selection* section then click tab on your keyboard. The checklist and comment should populate.

**Academic Institution:** WAxxx

**Administrative Function:** FINA

**Event ID:** FISFxxV1FW (i.e. FISFLCV1FW)



For *Populations Selection*, choose **PS Query** and **QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST**

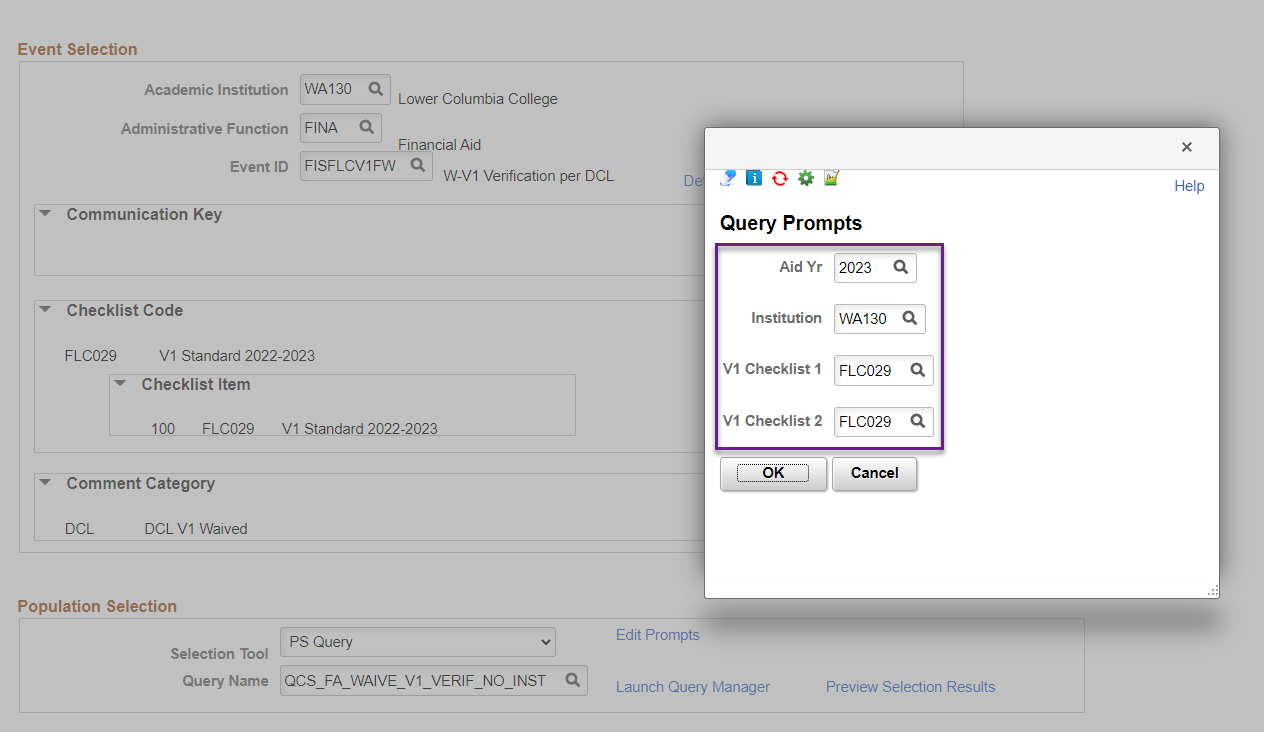
**Query prompts**

**Aid Yr:** 2023

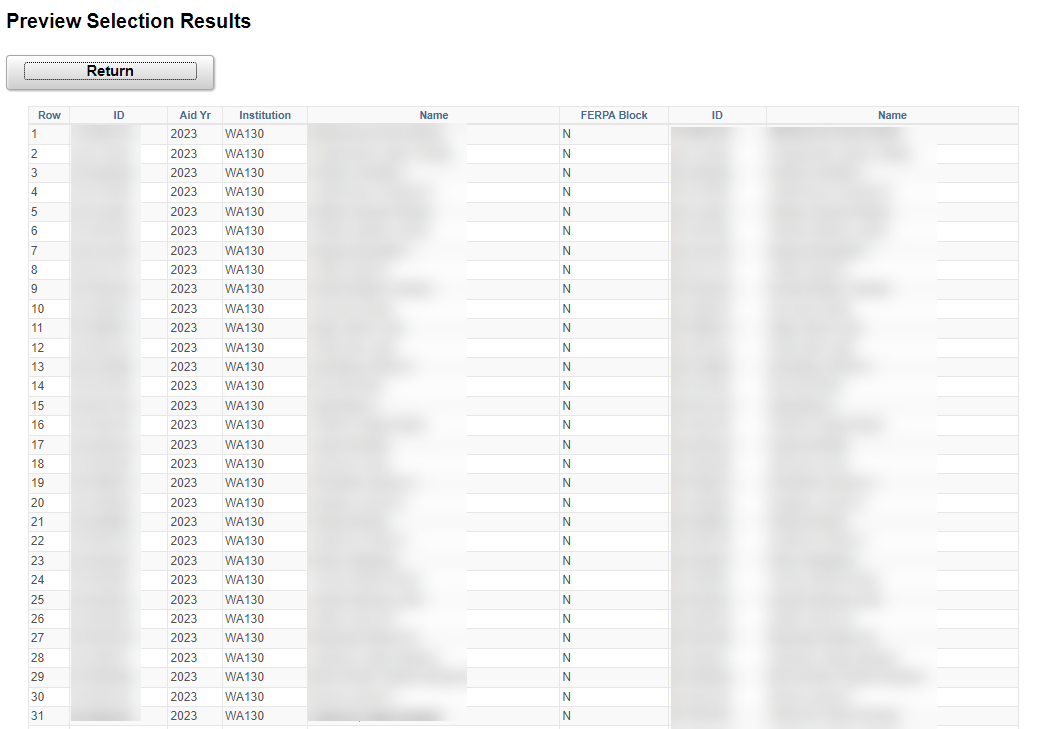
**Institution:** WAxxx (i.e. WA130)

**V1 Checklist 1:** Fxx029 (i.e. FLC029)

**V1 Checklist 2:** Colleges that have separated their V1 population into dependent versus independent will put their Fxx185 here. Everyone else will put Fxx029 again.



Click on **Preview Selection Results** to confirm the parameters you entered picked up the right students then click **Return**.



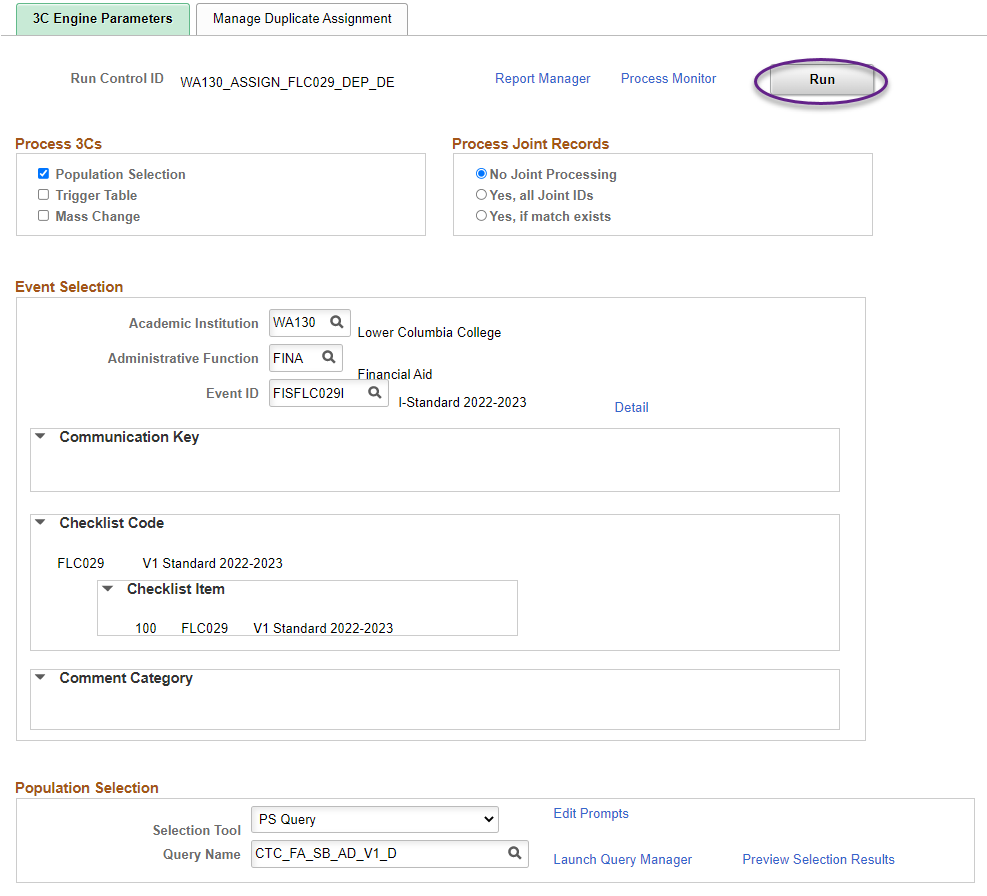
**Note:** This Event ID updates an existing checklist and does not assign a checklist, therefore, *Manage Duplicate Assignment* tab does not need to be configured.

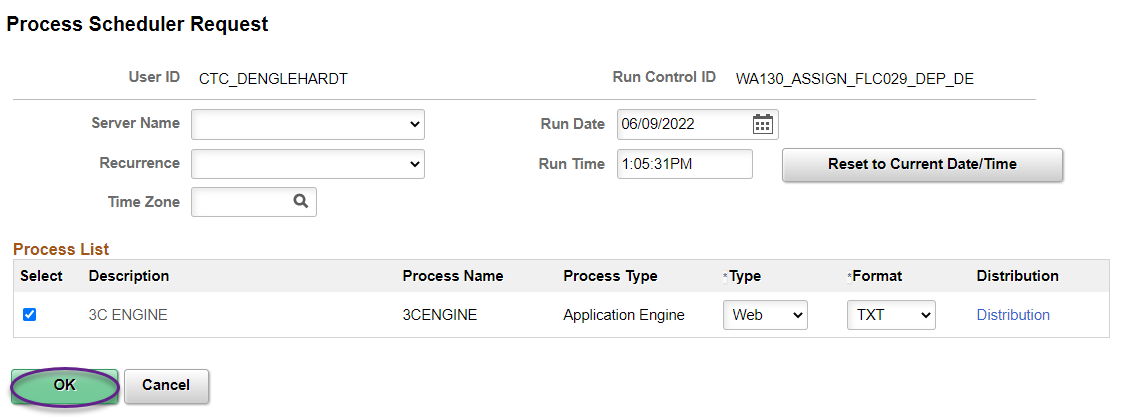
Click **Save** then exit.

## **Running the Assign, Pop then Waive**

1. Go to *Run 3C Engine* and run the two Run Control IDs you created to assign the V1 checklists to students that have the V1 flag on their ISIR

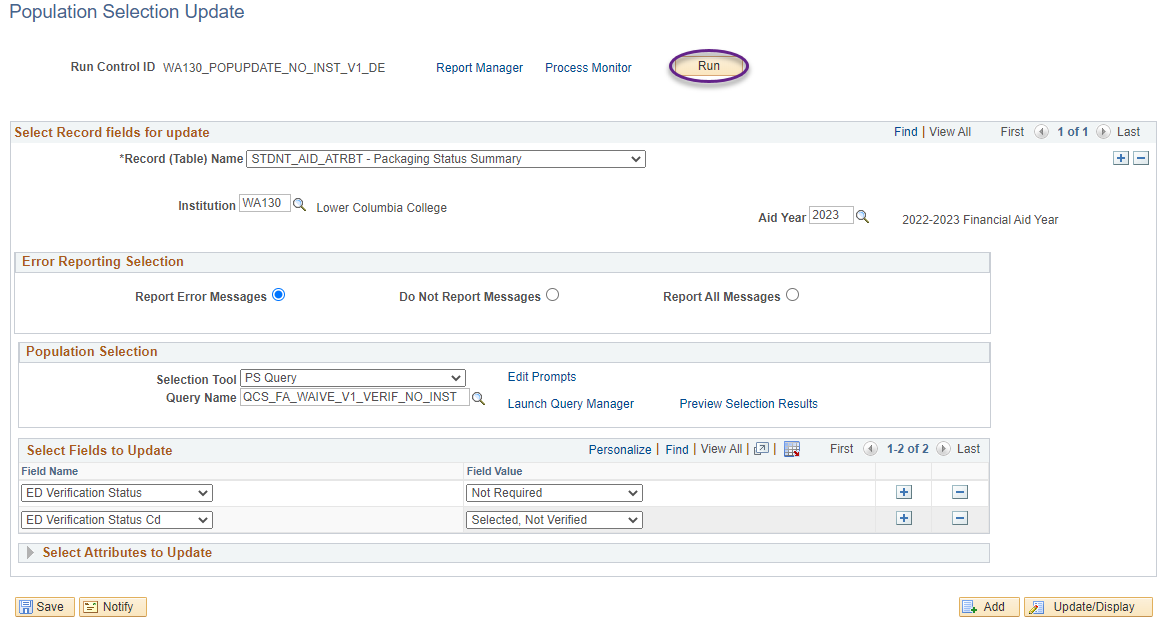
Example

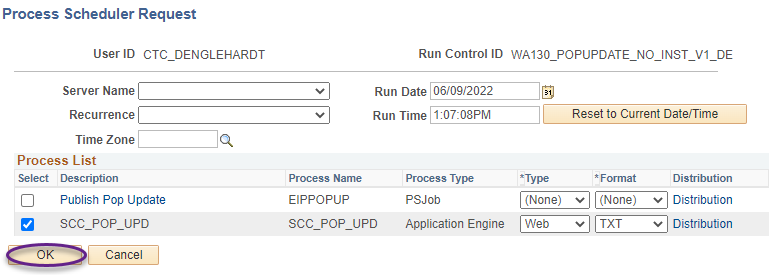




1. Go to *Population Update Process* and run the Run Control ID you created to pop-update the *Packaging Status Summary* pages

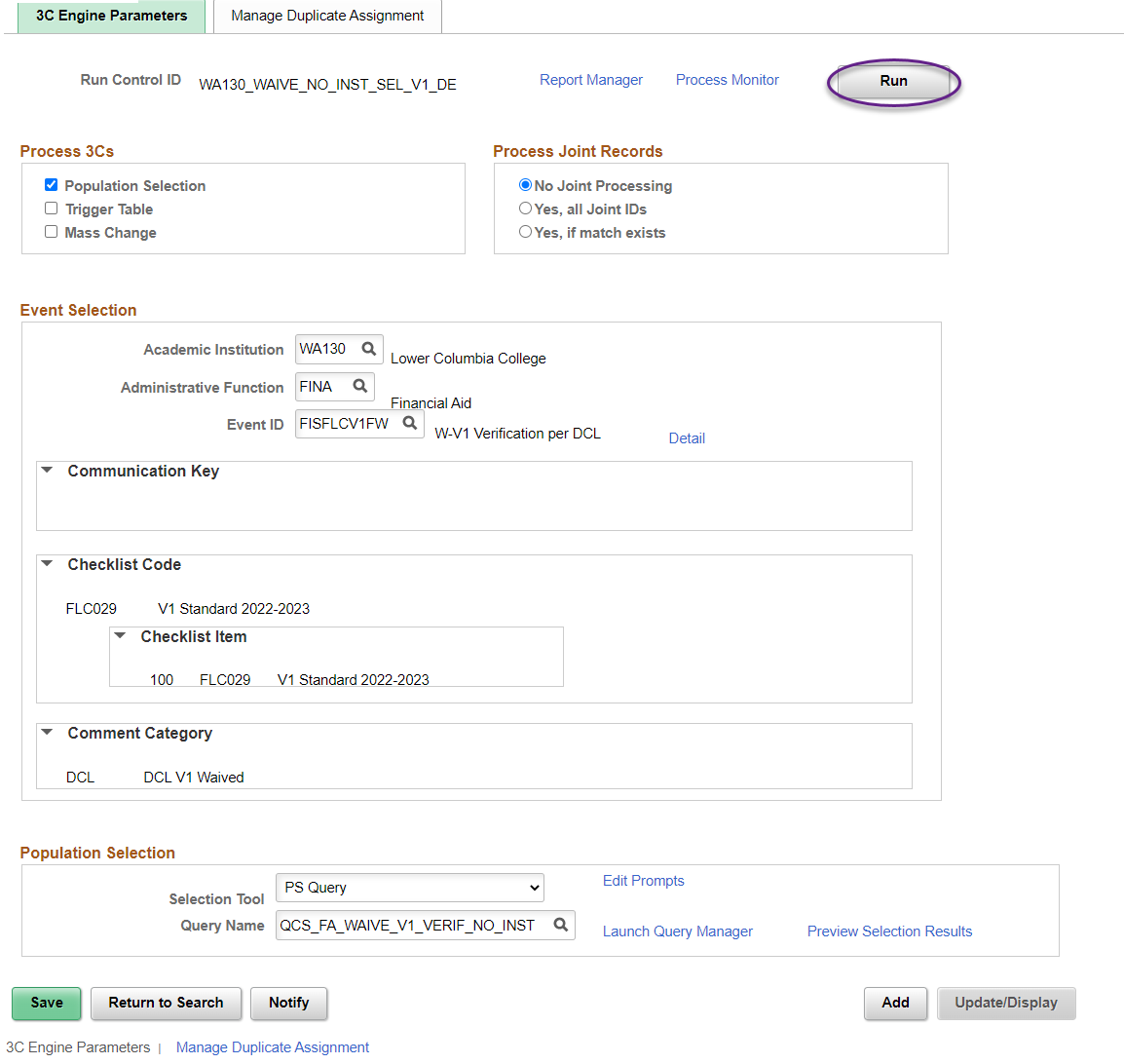
Example

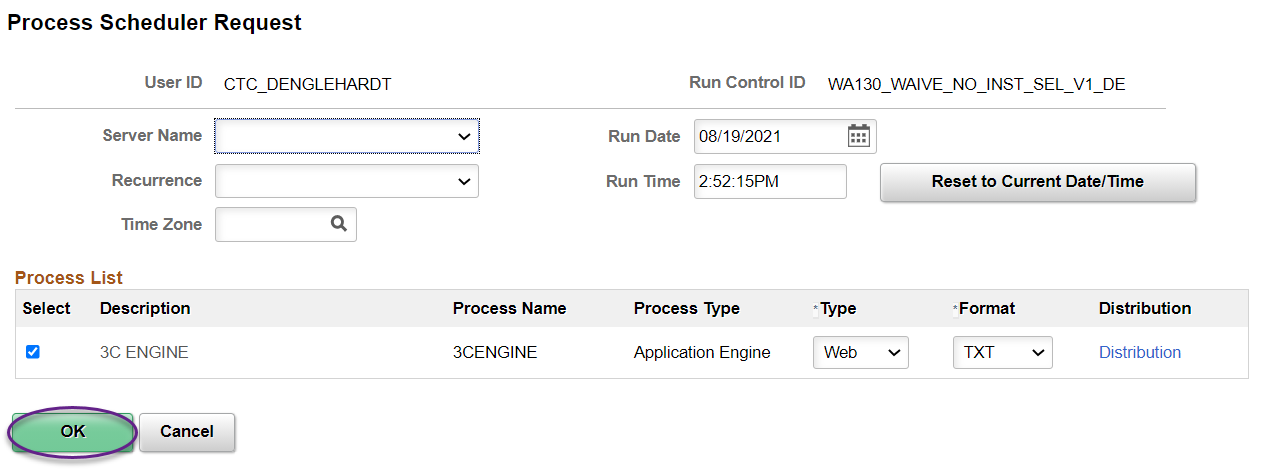




1. Go to *Run 3C Engine* and run the Run Control ID you created to waive checklists and add the DCL comment

Example





## **Creating the FAV1APW Job and Setting it On a Recurrence**

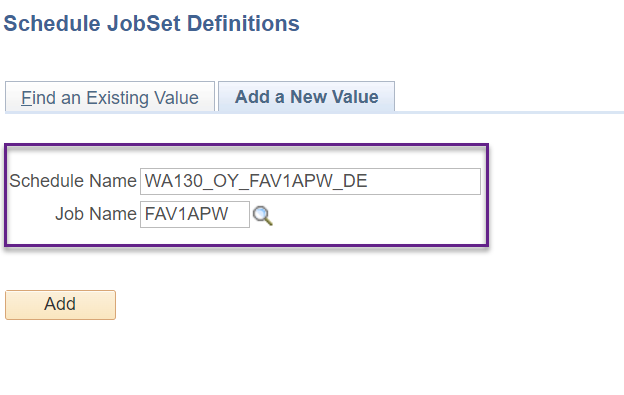
Note: Keep status ‘Inactive’ while creating the jobset.

Navigator > PeopleTools > Process Scheduler > Schedule JobSet Definitions

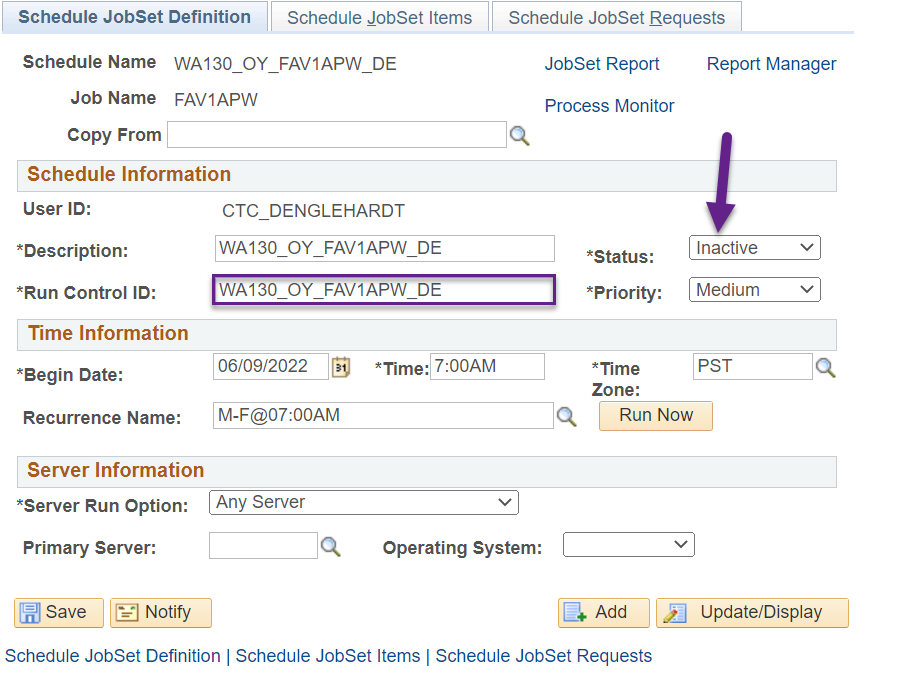
1. Select **Add a New Value**

For *Schedule Name* following the usual naming convention with FAV1APW as the description of the process i.e. WA130\_OY\_FAV1APW\_DE

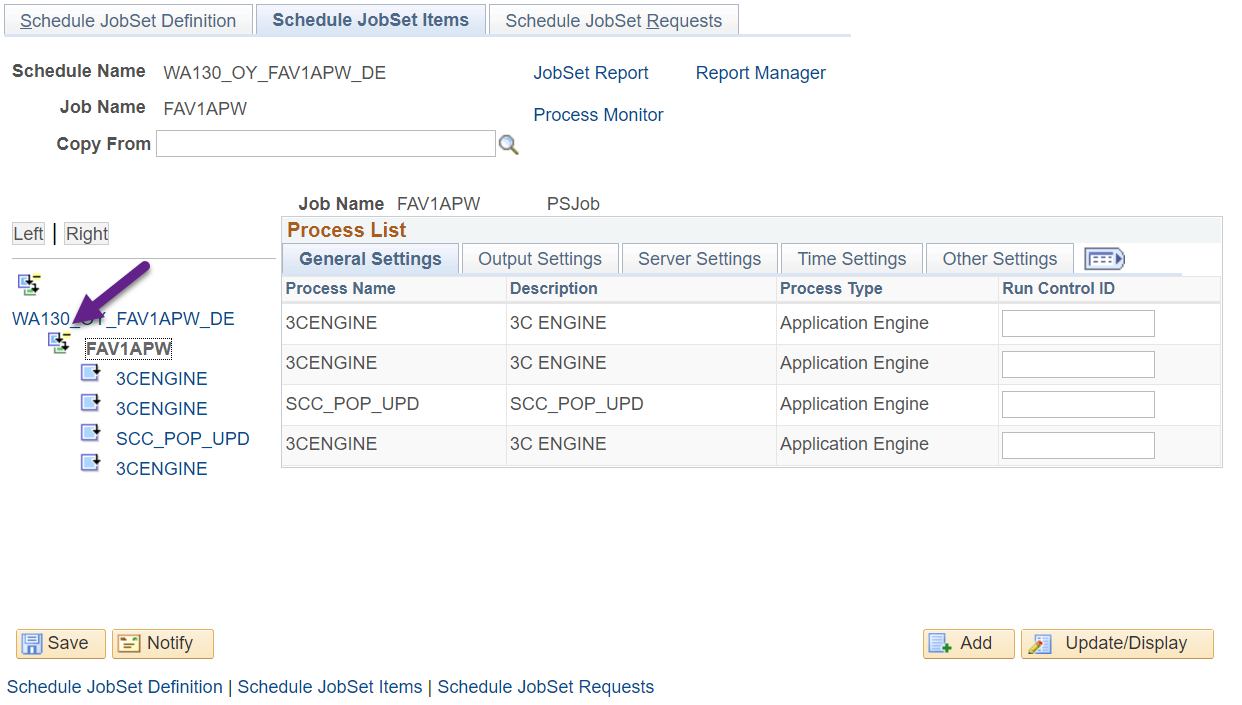
For *Job Name*, enter **FAV1APW**



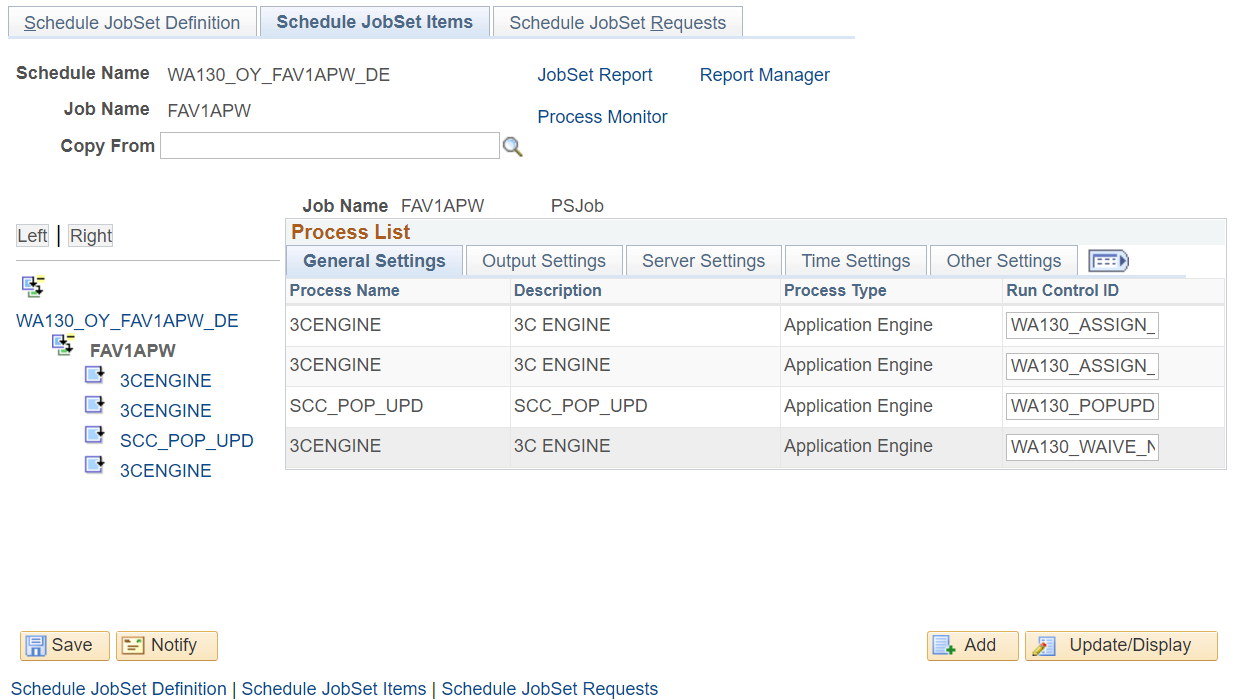
1. Copy and paste your Schedule Name into the Run Control ID field and after confirming the status is *Inactive*, select **Save**



1. Select the **Expand** button to open up the fields on the jobset



1. Paste the Run Control IDs you created into the appropriate fields



3CENGINE (1) field: Assign V1 dependent Run Control ID

3CENGINE (2) field: Assign V1 independent Run Control ID

SCC\_POP\_UPD field: Pop-update Packaging Status Summary Page Run Control ID

3CENGINE (3) field: Waive V1 checklists and add Comment Run Control ID

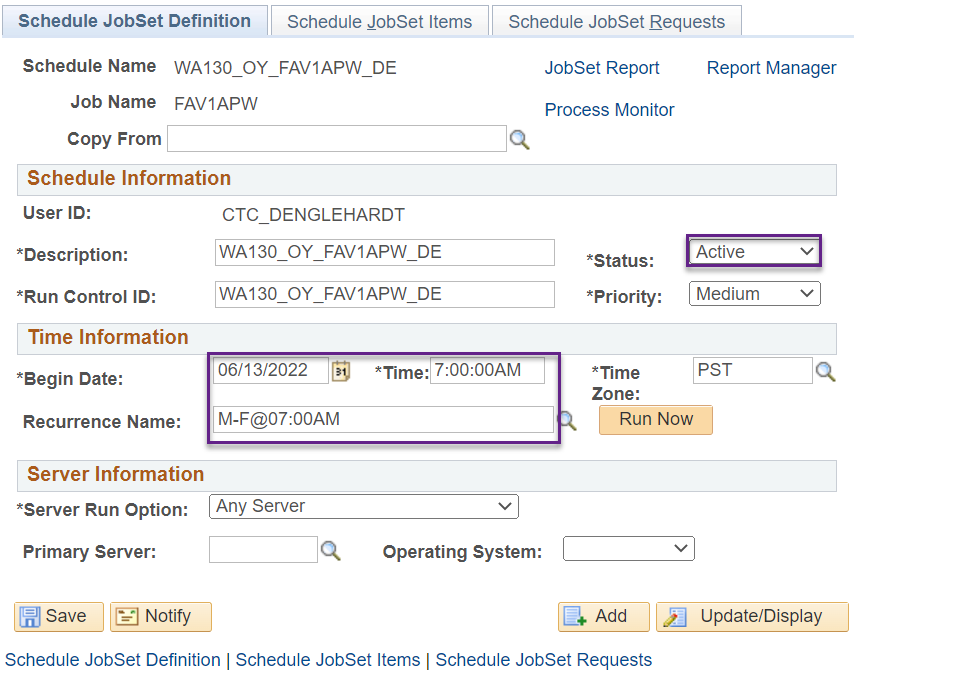
Select Save

1. When you’re ready to turn on the jobset, select the *Begin Date*, *Time* and *Recurrence Name* then flip the status of the jobset to Active

**Begin Date:** (tomorrow’s date)

**Time:** 7:00 AM

**Recurrence Name:** M-F@07:00AM



**Note:** Sometimes the Recurrence will disappear after you click Save, if that happens, select the recurrence again.

## **NEW: ADDITIONAL Data Cleanup of Institutionally Selected V1 students**

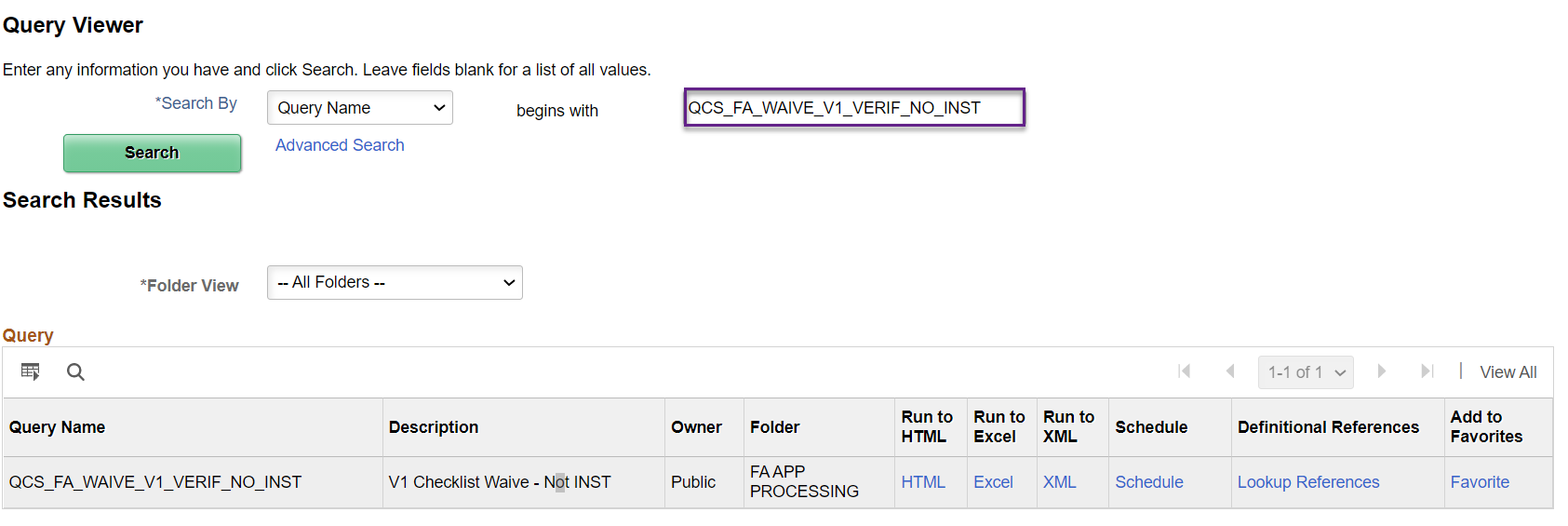
**for Colleges that assigned Fxx025, Fxx027, Fxx034 to V1 (ONE TIME ONLY)**

For this to be a one-time clean up, moving forward, when you institutionally select a student for verification, make sure to code the **Packaging Status Summary** page to **INST Verification Status** = **Selected for Verification**.

Find and clean up students who you’ve selected for verification and added the **Fxx025, Fxx027, Fxx034** checklist to but did not set the ***Packaging Status Summary*** page to **INST Verification Status** to **Selected for Verification**

1. **Go to Query Viewer and search for *QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST***

Navigation: Reporting Tools > Query > Query Viewer



1. **Download a spreadsheet of the population that will be updated with this new process**

Click on HTML, EXCEL or Schedule (if your college is a big school) and save the results

**Query prompts**

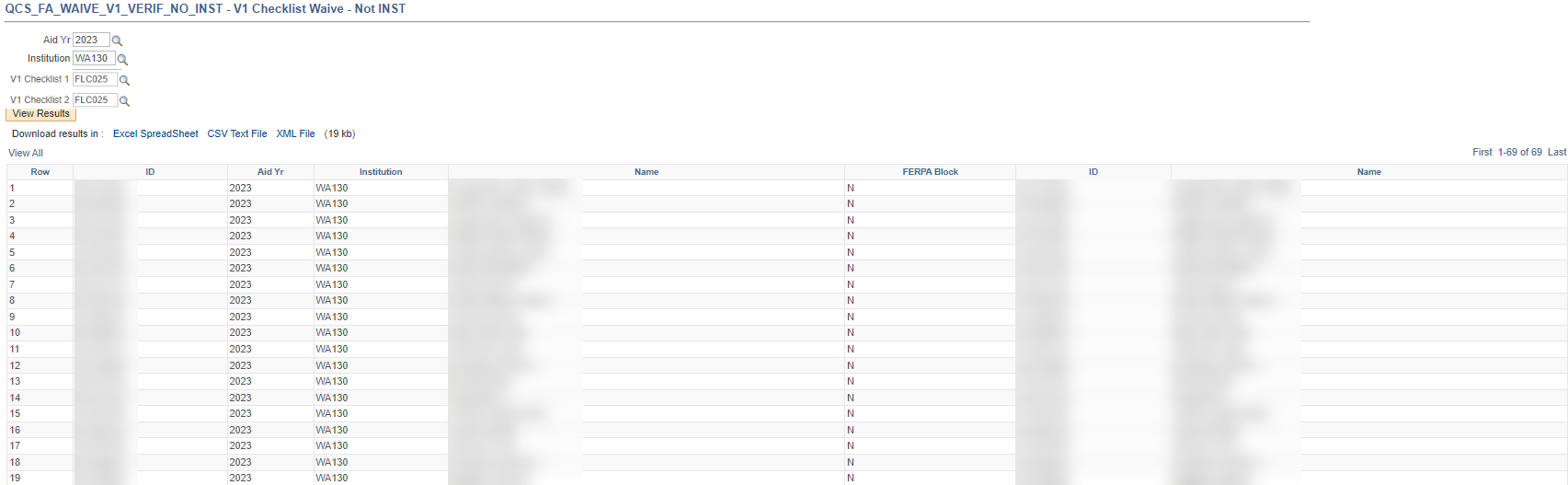
**Aid Yr:** 2023

**Institution:** WAxxx (i.e. WA130)

**V1 Checklist 1:** Fxx025 (i.e. FLC025)

**V1 Checklist 2:** Fxx025 (i.e. FLC025)

**Repeat this step for all potentially manually assigned checklists (Fxx027, Fxx034)**



1. **Run the following assign queries, depending on how many institutionally selected checklists you need to identify**

***CTC\_FA\_SB\_AD\_025***

***CTC\_FA\_SB\_AD\_027***

***CTC\_FA\_SB\_AD\_034***

**Etc.**

**and download the results.**

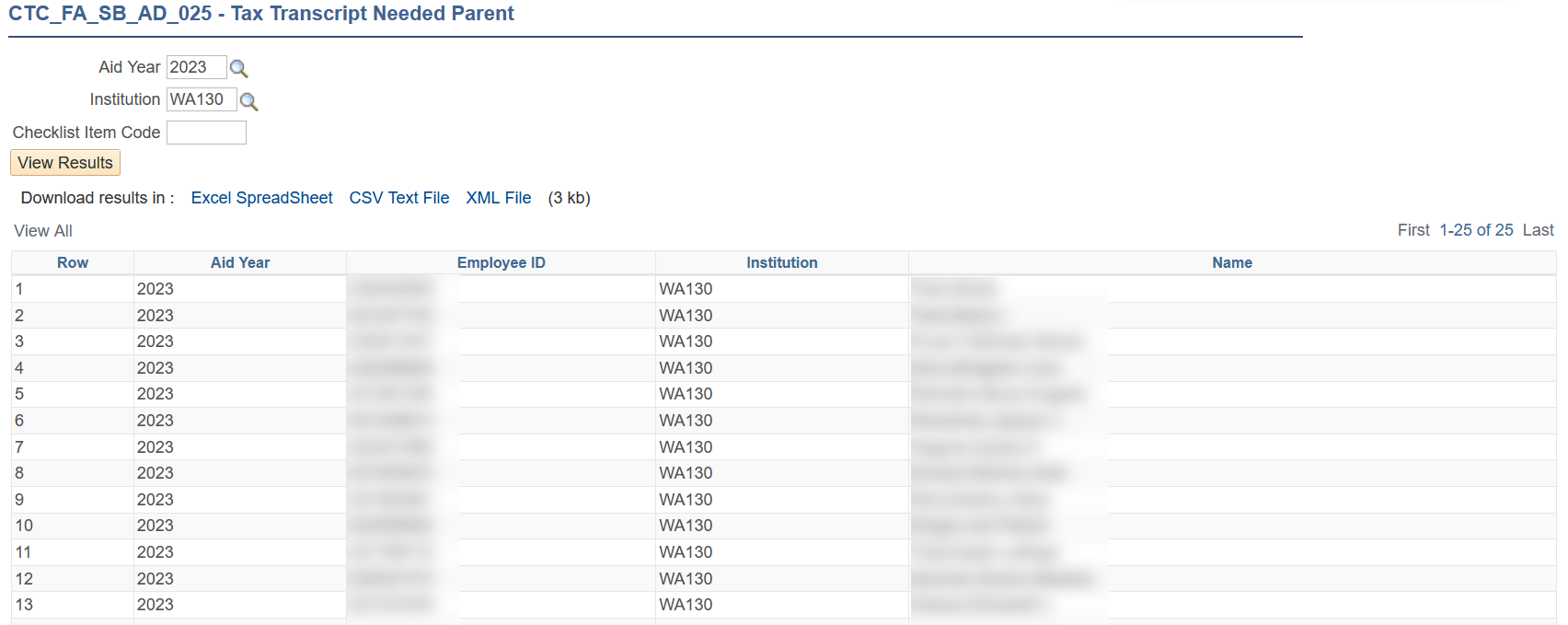
Click on HTML, EXCEL or Schedule (if your college is a big school) and save the results

**Query prompts**

**Aid Yr:** 2023

**Institution:** WAxxx (i.e. WA130)

**Checklist:** Leave blank or enter 000000

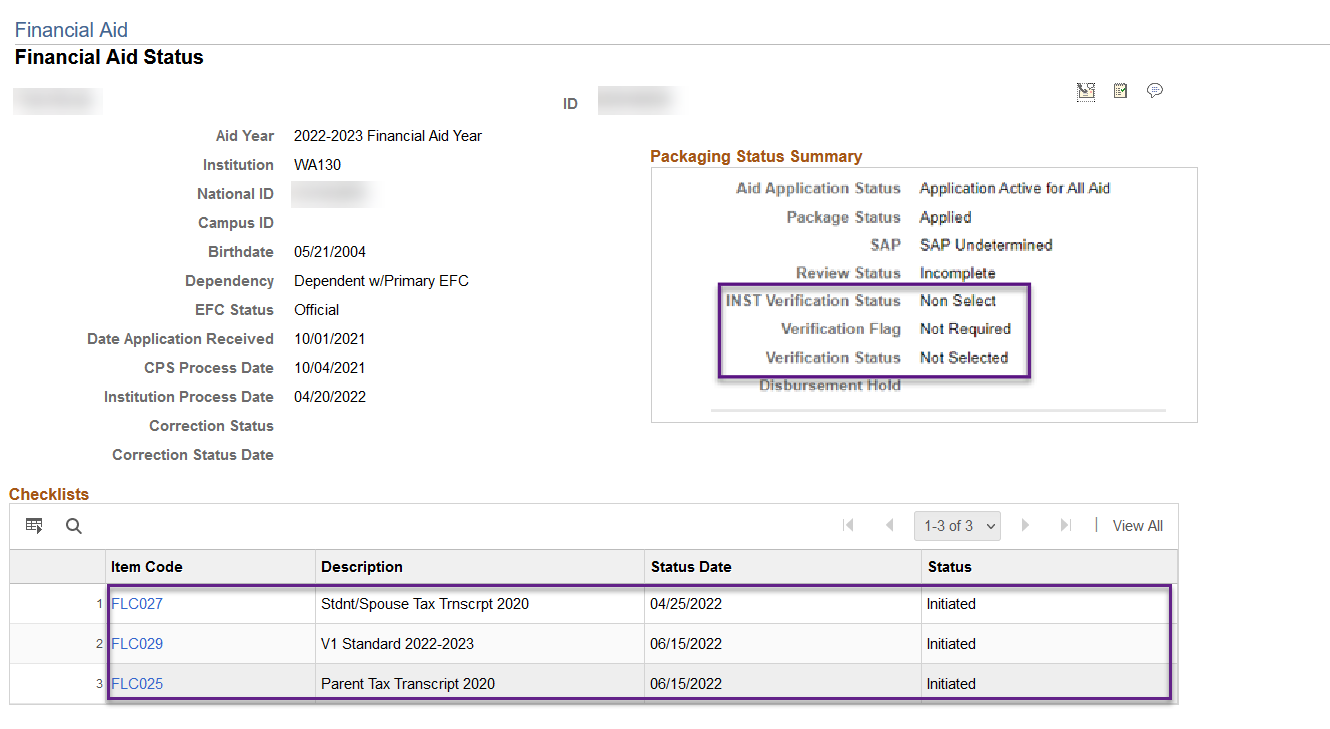


If you combine the results from both V1 queries, you will get the students who have V1 flag on their ISIR

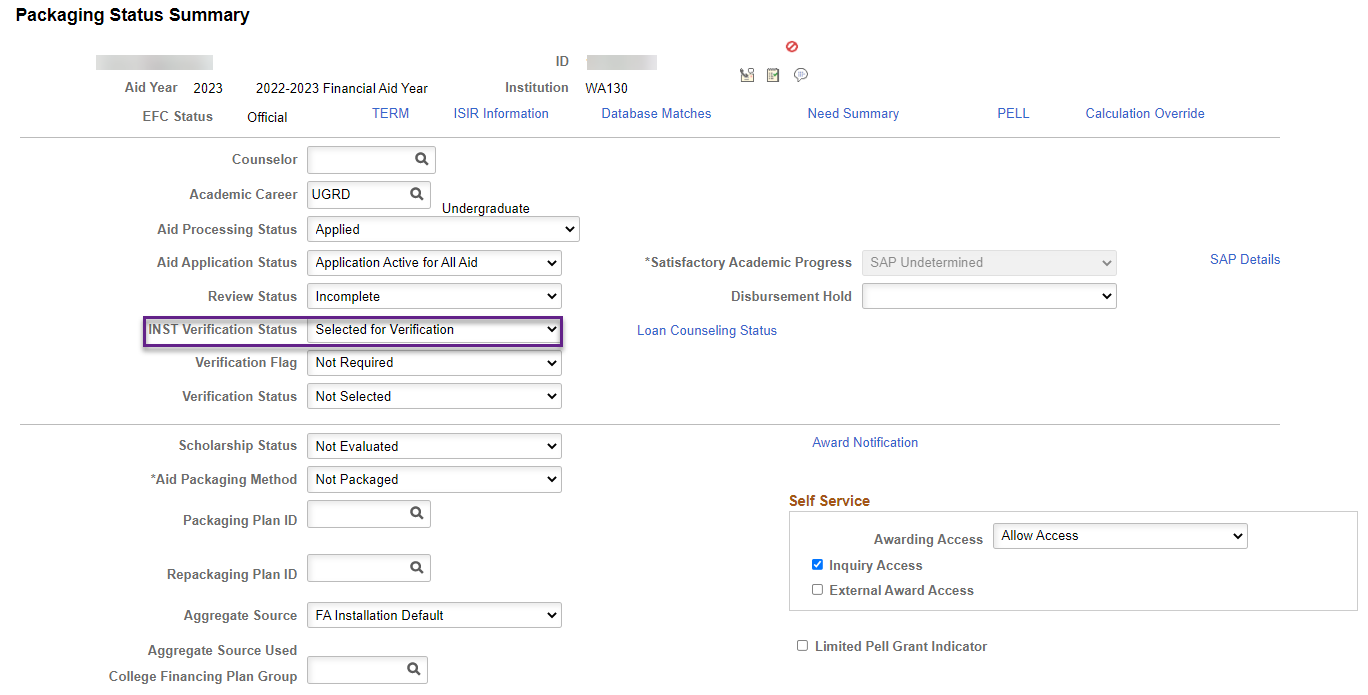
1. **Compare the results from *QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST* with the Fxx025, Fxx027, Fxx034 lists you created in the previous step**

Anyone that you see is on the *QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST* results but not on the Fxx025, Fxx027, or Fxx034 lists is a student who was selected for V1 by your college and the **Packaging Status Summary** page needs to be updated so their checklist(s) do not get waived.

Below is an example of what the student’s *Financial Aid Status* screen may look like.



On the **Packaging Status Summary** page, flip the **INST Verification Status** to **Selected for Verification** then the student’s V1 checklist will not be waived when you run the waive process.



1. **One Time ‘WAIVE” of Fxx025, Fxx027, Fxx034**

After you have manually set the desired students to an Institutionally selected status in the above step, you will run your waive 3C Engine for each of these checklist items after making one change to each of the run controls.

Go to *Run 3C Engine* and look up your existing WAIVE Run Control ID for Fxx025.

**Note: You will be repeating these steps to WAIVE Fxx027 and Fxx034.**

For *Populations Selection*, choose **PS Query** and **QCS\_FA\_WAIVE\_V1\_VERIF\_NO\_INST**

**Query prompts**

**Aid Yr:** 2023

**Institution:** WAxxx (i.e. WA130)

**V1 Checklist 1:** Fxx025 (i.e. FLC025)

**V1 Checklist 2:** Fxx025 (i.e. FLC025)

**Preview Selection Results.**

**Save.**

**Click Run to run the process** immediately to perform this one time WAIVE for this set of students.

Since ALL V1 related checklist assignment run controls should be removed from your nightly jobset, this step will not need to be run again.

**Repeat this step for all potentially manually assigned checklists (Fxx027, Fxx034)**

