File Processing in ctcLink

Step-by-Step Guide

(Best viewed with Navigation Pane activated)

**Financial Aid Office**

**Spokane Community College**

**Created December 2017 by Sharon Gerlach**

**Contents**

[Checklist 1](#_Toc106349430)

[Quick Tips 2](#_Toc106349431)

[Use the View Financial Aid Status page for a quick overview of most file processing items 2](#_Toc106349432)

[Arrange your Favorites in order of use 3](#_Toc106349433)

[Add pages to your NavBar for quick links 4](#_Toc106349434)

[Add new Homepages with commonly used pages 5](#_Toc106349435)

[Important Links 6](#_Toc106349436)

[Admissions 7](#_Toc106349437)

[Ability to Benefit 9](#_Toc106349438)

[Career Pathway Eligibility 9](#_Toc106349439)

[High School Completion 10](#_Toc106349440)

[Recent High School Graduates 10](#_Toc106349441)

[Program of Study (Career Plan) 11](#_Toc106349442)

[Troubleshooting Students Career Plans 14](#_Toc106349443)

[Program Updates – Future-Dated Program Changes 14](#_Toc106349444)

[Multiple Plans in Program Stack 14](#_Toc106349445)

[Residency 16](#_Toc106349446)

[Residency Mismatch 16](#_Toc106349447)

[Non-resident in Admissions and Resident on FAFSA 16](#_Toc106349448)

[Resident in Admissions and Non-Resident on FAFSA 17](#_Toc106349449)

[Citizenship 18](#_Toc106349450)

[Comment Codes 18](#_Toc106349451)

[Documentation 18](#_Toc106349452)

[Secondary Confirmation – ISIR 18](#_Toc106349453)

[SAVE System 19](#_Toc106349454)

[ISIR vs Bio Demo Mismatch & Residency Mismatch 20](#_Toc106349455)

[NSLDS 22](#_Toc106349456)

[Loan Page 22](#_Toc106349457)

[Pell Page 23](#_Toc106349458)

[Pell Lifetime Eligibility Used (LEU) 24](#_Toc106349459)

[Subsidized Usage Limit Applies (SULA) 25](#_Toc106349460)

[Updating Incoming Aggregate Amounts 25](#_Toc106349461)

[Satisfactory Academic Progress 26](#_Toc106349462)

[Student SAP Section 26](#_Toc106349463)

[SAP Calculation Results 26](#_Toc106349464)

[Simulate Student Eligibility 27](#_Toc106349465)

[EXHS status (formerly “GD” Suspension) 27](#_Toc106349466)

[SAP Contracts and Attending at Own Expense 27](#_Toc106349467)

[Graded Adult Basic Education Coursework 28](#_Toc106349468)

[Non-Graded Adult Basic Education Coursework 28](#_Toc106349469)

[Actions to Take for Ineligible SAP Status 28](#_Toc106349470)

[Verification 31](#_Toc106349471)

[Step 1: Manage 20xx-20xx Verification 31](#_Toc106349472)

[Step 2: Perform Auto Verification 34](#_Toc106349473)

[Step 3: Correct 20xx-20xx ISIR Records 35](#_Toc106349474)

[Required Fields for All Verification Tracking Groups 36](#_Toc106349475)

[Tax Transcript Decoder 38](#_Toc106349476)

[Taxes Paid Clarification: 38](#_Toc106349477)

[ISIRs in ctcLink 39](#_Toc106349478)

[Anatomy of an ISIR in ctcLink 39](#_Toc106349479)

[All Tabs 39](#_Toc106349480)

[Student Information Tab 39](#_Toc106349481)

[Parent Information Tab 40](#_Toc106349482)

[Assumptions\School Codes Tab 40](#_Toc106349483)

[EFC\DB Matches\Corr Tab 40](#_Toc106349484)

[ISIR Review 41](#_Toc106349485)

[Using Previous ISIRs 41](#_Toc106349486)

[Information to Review 41](#_Toc106349487)

[New ISIRs After File Has Been Reviewed 46](#_Toc106349488)

[Submitting Corrections on Non-Verification Files 48](#_Toc106349489)

[Changing Marital Status 49](#_Toc106349490)

[Academic Plans 50](#_Toc106349491)

[Previously Approved Academic Plans 50](#_Toc106349492)

[Tracking an Academic Plan from a Prior Year 50](#_Toc106349493)

[New Academic Plans 51](#_Toc106349494)

[Tracking a New Academic Plan 51](#_Toc106349495)

[User Edit Messages (UEM) 52](#_Toc106349496)

[Reasons for User Edit Messages: 52](#_Toc106349497)

[Maintenance of UEMs 52](#_Toc106349498)

[Checklist Items 54](#_Toc106349499)

[Rollover Checklist Items 54](#_Toc106349500)

[Waiving vs Completing vs Cancelling Checklist Items 54](#_Toc106349501)

[File Processing Comments 56](#_Toc106349502)

[To Add a Comment 56](#_Toc106349503)

[To Edit a Comment 56](#_Toc106349504)

[Comment Categories 57](#_Toc106349505)

[Budget Adjustments 58](#_Toc106349506)

[If increasing for actual tuition costs 58](#_Toc106349507)

[If adding program costs (such as tool allowance) to a student’s budget 58](#_Toc106349508)

[If cost of attendance is missing a quarter 58](#_Toc106349509)

[If funding fewer credits than the student is enrolled 58](#_Toc106349510)

[Prepare Student Record for Packaging 60](#_Toc106349511)

[Non-Verification Files 60](#_Toc106349512)

[Verification Files 60](#_Toc106349513)

[Database Match Override 60](#_Toc106349514)

[Package Awards 62](#_Toc106349515)

[Update Incoming Aggregates 63](#_Toc106349516)

[Invoke Professional Judgment 65](#_Toc106349517)

[Institutional Funding 65](#_Toc106349518)

[FSEOG 65](#_Toc106349519)

[SCC Grant and Need-Based Tuition Waiver 65](#_Toc106349520)

[Order of Awards 65](#_Toc106349521)

[Award Order Flowchart 67](#_Toc106349522)

[Awarding When Student Attended Summer Transitional Studies Coursework 68](#_Toc106349523)

[Update Summer Financial Aid Term 68](#_Toc106349524)

[Summer Term Awarding 68](#_Toc106349525)

[Before Awarding Summer Term 68](#_Toc106349526)

[Processing Financial Aid Package for Students Not Previously Funded 69](#_Toc106349527)

[Revising Financial Aid Package for Previously Funded Students 69](#_Toc106349528)

[Packaging Student Loans 71](#_Toc106349529)

[Loans that Will Disburse After October 1 71](#_Toc106349530)

[No Change in Origination Fees 71](#_Toc106349531)

[Minimum Loan Amounts 72](#_Toc106349532)

[Loan prorations 72](#_Toc106349533)

[Loans at Another Institution 72](#_Toc106349534)

[Expired Master Promissory Notes 72](#_Toc106349535)

[Recycling Loan Item Types 72](#_Toc106349536)

[30-Day Delay Loans 73](#_Toc106349537)

[Second Year Loan Amounts 73](#_Toc106349538)

[Parent PLUS Loans 74](#_Toc106349539)

[Awarding Respiratory Care BAS Students 74](#_Toc106349540)

[First and Second Year BAS Students: 74](#_Toc106349541)

[Third & Fourth Year BAS Students: 74](#_Toc106349542)

[Reactivating Previously Cancelled Aid 75](#_Toc106349543)

[Awarding non-FAFSA Students 75](#_Toc106349544)

[Activate Aid Year 76](#_Toc106349545)

[Build Financial Aid Term 76](#_Toc106349546)

[Create Budget 76](#_Toc106349547)

[Adjust Budget 76](#_Toc106349548)

[Award Error Messages 77](#_Toc106349549)

[Completing the File Processing Worksheet 0](#_Toc106349550)

[Loan-Only Communication 1](#_Toc106349551)

[Speed Key 1](#_Toc106349552)

[Assign Communication 1](#_Toc106349553)

[Professional Judgment 3](#_Toc106349554)

[Dependency Override (Dependent to Independent) 3](#_Toc106349555)

[ctcLink: 3](#_Toc106349556)

[FAA Access 3](#_Toc106349557)

[Change of Financial Circumstances 4](#_Toc106349558)

[ctcLink: 4](#_Toc106349559)

[FAA Access 4](#_Toc106349560)

[Separation/Divorce after Awarded 5](#_Toc106349561)

[ctcLink: 5](#_Toc106349562)

[FAA Access 5](#_Toc106349563)

[Tax Return Line Items for 2020-21 & 21-22 Professional Judgment 6](#_Toc106349564)

[Adjusting Awards (Increases and Decreases) 9](#_Toc106349565)

[How to adjust awards 9](#_Toc106349566)

[Sample worksheet 11](#_Toc106349567)

[Set up Merge Document for FA Worksheet: 12](#_Toc106349568)

[Watermark for NSLDS Printouts 13](#_Toc106349569)

[Index 14](#_Toc106349570)

# **Checklist**

**Print worksheets**

[Sample Worksheet](#_SAMPLE_PRINTABLE_WORKSHEET) in this guide

**Review SAP (in ctcLink and in FAM/SMS)**

Navigator > Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

**Check program of study**

Navigator > Campus Community > Student Services Center

Navigator > Records and Enrollment > Career and Program Information > Student Program/Plan

**Check residency**

Navigator > Campus Community > Personal Information > Identification > Residency Data

**Review NSLDS**

<https://www.nsldsfap.ed.gov/nslds_FAP/>

**\*Do verification (if selected; make sure current transaction is not rejected)**

Navigator > Financial Aid > Verification > Manage 20xx-20xx Verification

Navigator > Financial Aid > Verification > Perform Auto Verification

Navigator > Financial Aid > Federal Application Data > Correct 20xx-20xx ISIR

**Review ISIR**

Navigator > Financial Aid > Federal Application Data > Correct 20xx-20xx ISIR

**Review any new academic plans or requirements for previous ones**

Navigator > Financial Aid > View Financial Aid Status

Navigator > Financial Aid > Disbursement > Maintain User Edit Messages

**Resolve any checklist items**

Navigator > Financial Aid > View Financial Aid Status, or

Navigator > Campus Community > Checklists > Person Checklists > Checklist Management-Person

**Resolve any relevant service indicators**

Navigator > Campus Community > Service Indicators (Student) > Manage Service Indicators

**Check for updated WCG/CBS information if packaging on a newly loaded ISIR correction**

Navigator > Financial Aid > CTC Custom > CTC Interfaces

**Complete View Packaging Summary page**

Navigator > Financial Aid > View Packaging Status Summary

**Make any necessary notes on worksheet**

**On the View Financial Aid Status page, add a comment with the ISIR # and EFC used for packaging**

**Package awards**

Navigator > Financial Aid > Awards > Award Processing > Assign Awards to a Student

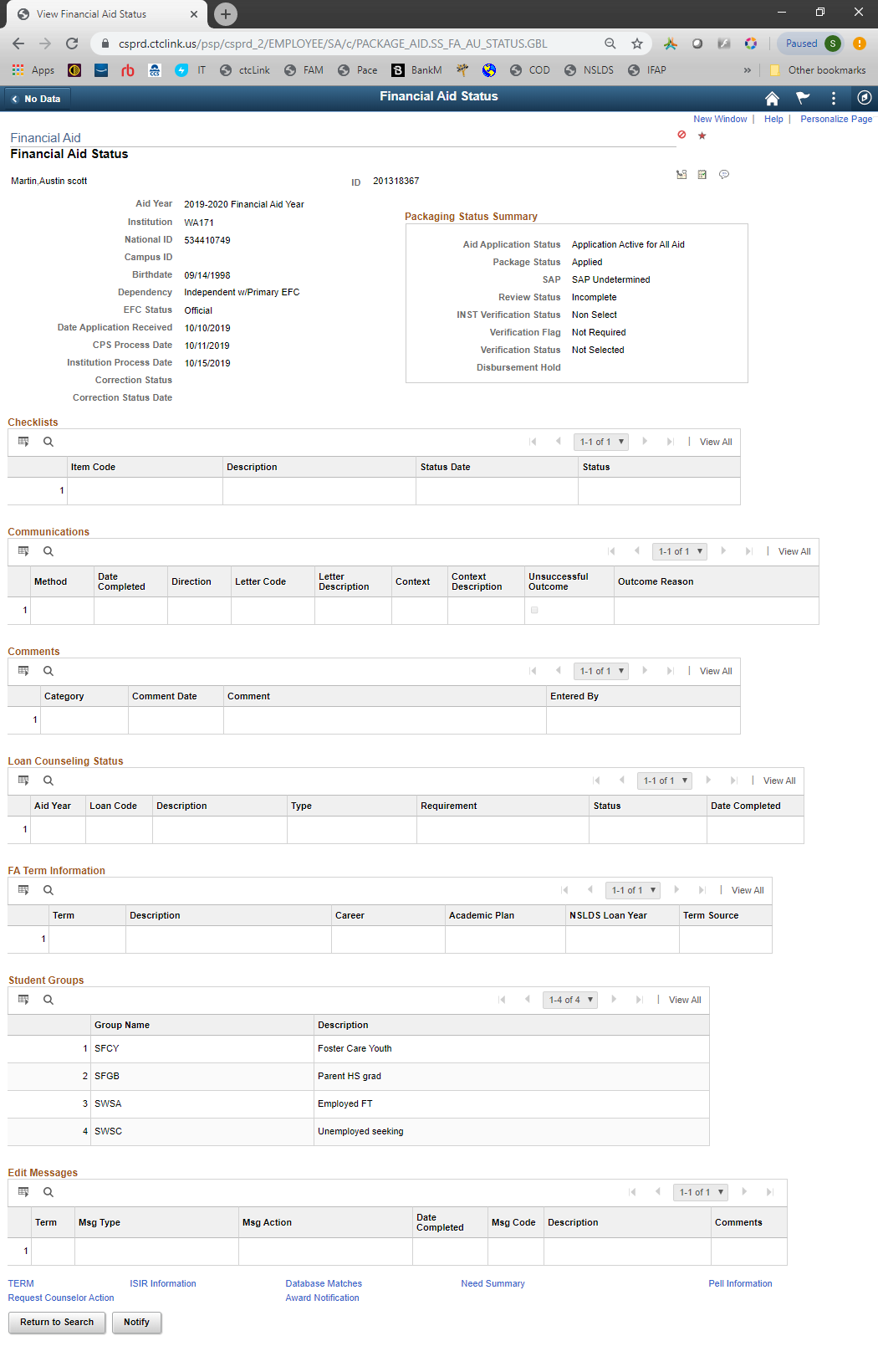
**Assign Loan-Only Communication (if applicable)**

Navigator > Financial Aid > View Financial Aid Status, or

Navigator > Campus Community > Communications > Person Communications > Communication Management

# **Quick Tips**

## **Use the View Financial Aid Status page for a quick overview of most file processing items**



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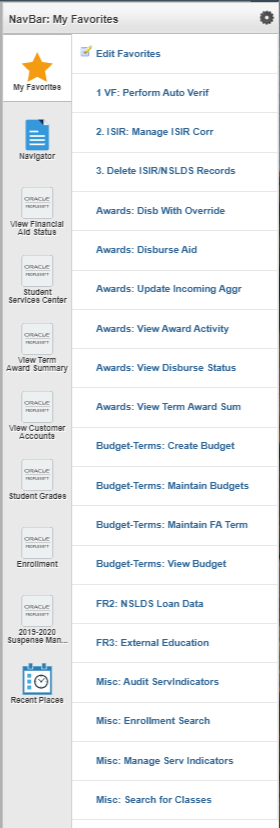
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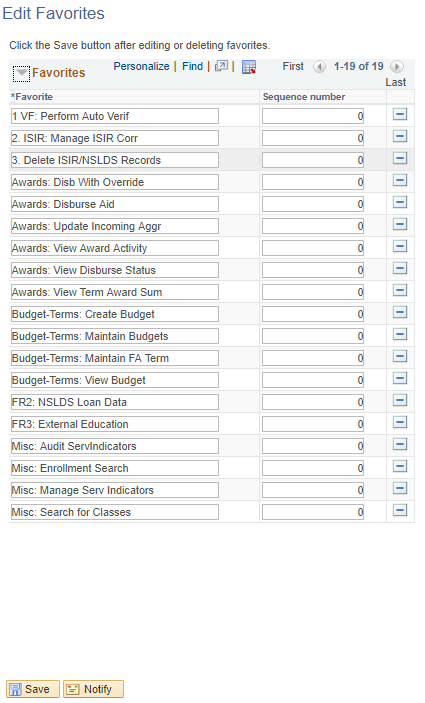
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|  |  |
| --- | --- |
| 1. EFC – official or other 2. Application date ( 3. SAP 4. Verification flags 5. ISIR Correction Status & Status Date | 1. Missing checklist items (click View All) 2. Financial Aid academic plans and restrictions 3. Program linked to FA terms 4. Waitlisted for or accepted to program 5. User edit messages |

## **Arrange your Favorites in order of use**

Here’s a sample of an ordered Favorites list (left).



You can customize the name of the favorited pages to determine the order they show in the list. Numbers will default to the top of the list.

My Favorites > Edit Favorites

To edit the order of your favorites, change only the sequence number (right side).

To edit the name and maintain alphabetic order, edit only the name (left side)



**Home Search Actions NavBar Settings**

## **Add pages to your NavBar for quick links**

**To simplify customer service or daily tasks, add pages to your NavBar:**

1. Navigate to the desired page
2. Click the Actions icon in the upper right hand corner of the page
3. Click **Add to NavBar**

When you click the NavBar icon , the NavBar will appear, and you will see the pages you saved as tiles.

**To change the order of the NavBar icons:**

1. Select the Settings icon
2. Drag the tiles until they are in the order desired
3. Click the green **Done** button

Browser Tip: Zoom in and out quickly!

Zoom in: CTRL + +

Zoom out: CTRL + –

Normal: CTRL + 0 (zero)

This will work in any browser (Firefox, Chrome,

and Internet Explorer)

## **Add new Homepages with commonly used pages**

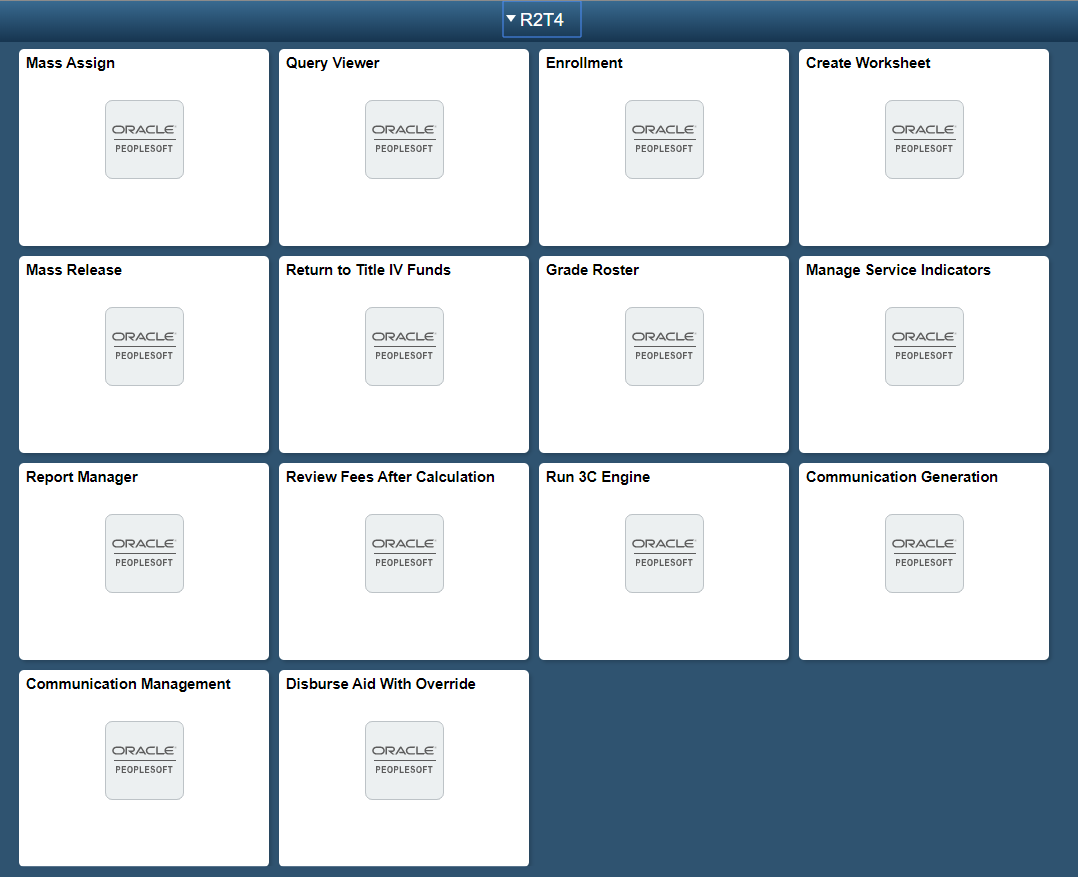
It can be helpful to add new Homepages to contain tiles for the pages used for a certain function, such as file processing.

1. To create a new Homepage:
2. Click the Actions icon
3. Select Personalize Homepage
4. Click Add Homepage (above the list of current Homepages on the left-hand side)
5. In the pop-up window, enter the desired name for the new Homepage in the field under **Or create a new Homepage**
6. Click Add

Your new Homepage is created. You can add tiles using the **Add Tiles** button (very limited options), or you can navigate to the pages you want to include on your new Homepage and add them.

1. Click the NavBar icon to open the NavBar
2. Click the Navigator tile
3. Find the page desired and click the link
4. Click the three stacked dots icon
5. Click Add to Homepage
6. In the pop-up, selected the Homepage desired
7. Repeat for all pages desired

The pages added to a Homepage will show as tiles.



# **Important Links**

**BankMobile**

**FAA:** [**https://www.bankmobileadminsupport.com/adminsite/login/start.do**](https://www.bankmobileadminsupport.com/adminsite/login/start.do)

**Students:** [**https://mybigfootcard.vibeaccount.com/**](https://mybigfootcard.vibeaccount.com/)

**Common Origination & Disbursement Website (COD)**

[**https://cod.ed.gov/cod/LoginPage**](https://cod.ed.gov/cod/LoginPage)

**Community Colleges of Spokane IT Support Center**

[**https://ccspokane.freshservice.com/support/home**](https://ccspokane.freshservice.com/support/home)

**ctcLink**

[**http://ctclink.spokane.edu/**](http://ctclink.spokane.edu/)

**FAA Access to CPS Online**

[**https://faaaccess.ed.gov/FOTWWebApp/faa/faa.jsp**](https://faaaccess.ed.gov/FOTWWebApp/faa/faa.jsp)

**Federal Student Aid Page**

[**https://studentaid.gov/**](https://studentaid.gov/)

**FSA Partners (formerly IFAP)**

[**https://fsapartners.ed.gov/home/**](https://fsapartners.ed.gov/home/)

**National Association of Financial Aid Administrators**

**Main Site:** [**http://www.nasfaa.org/**](http://www.nasfaa.org/)

**AskRegs:** [**https://askregs.nasfaa.org/MyAccount/LogOn?ReturnUrl=%2f**](https://askregs.nasfaa.org/MyAccount/LogOn?ReturnUrl=%2f)

**National Student Loan Data System (NSLDS)**

**FAA**: [**https://nsldsfap.ed.gov**](https://nsldsfap.ed.gov)

**Students:** [**https://nsldsfap.ed.gov/nslds\_SA/**](https://nsldsfap.ed.gov/nslds_SA/)

**SBCTC Help Desk**

[**https://servicedesk.sbctc.edu/helpdesk/WebObjects/Helpdesk.woa**](https://servicedesk.sbctc.edu/helpdesk/WebObjects/Helpdesk.woa)

**State Board for Community and Technical Colleges (SBCTC)**

[**https://www.sbctc.edu/colleges-staff/**](https://www.sbctc.edu/colleges-staff/)

**Mood Music for Productivity**

(Be sure to stream from your phone, not from your work computer)

[**https://www.brain.fm/**](https://www.brain.fm/)

[**https://www.accuradio.com/workplace-moods/**](https://www.accuradio.com/workplace-moods/)

# **Admissions**

**Navigator > Campus Community > Student Services Center**

If a student has not applied for admission to the college, their FAFSA information will not load into the system. If a student completed their FAFSA long enough ago that we should have received it but the View Financial Aid Status page does not show their information, check the student’s admission information first.

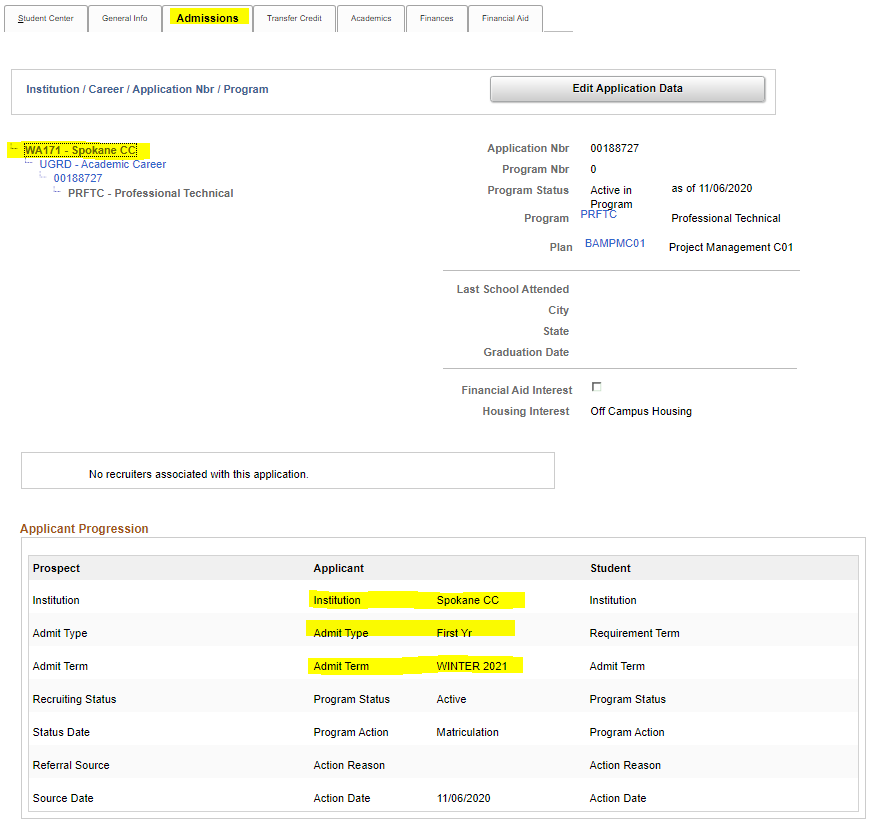
Admission information can be found on the **Admissions** tab in the **Student Services Center**. To view SCC’s admissions information, click on **ACADM** or **PRFTC** under the institution **WA171 – Spokane CC**. The admissions information will display below in the Applicant Progression section, UNLESS:

* **The student applied for Admission before the 2015 conversion to ctcLink**  
  Students returning within 6 years of last attendance do not have to reapply for admission to the college; they will simply submit a Student Information Update Form.

Look for:

* + Updated program information and/or
  + Open upcoming term
* **The student is transitioning from Running Start admit to full admit**Students who entered the college under the Running Start program and who have now graduated from high school must apply for full admission to the college. This is done with the submission of a Student Information Update Form and a copy of the high school diploma or high school transcript with a graduation date  
    
  Look for:
  + Inactivated Running Start group(s)
  + Open upcoming term
  + Citizenship status populated in the **Actual Bio/Demo Data** section on ISIR
  + Copy of high school transcript with graduation date or high school diploma in Halfile

Below is an example of a typical new admissions page:



# **Ability to Benefit**

Students without a high school diploma or GED certificate may be eligible to attend in specific career pathways in order to become eligible for financial aid.

Currently, ATB files are reviewed at the director level, but for informational purposes, some general highlights are listed below:

* Student must be in six or more college-level credits (course numbers 100+)
* Developmental or remedial coursework is not counted toward enrollment level
* Student should be in approved program; see chart below for eligible programs
* Associate in Arts is **not** an approved program
* Student should have been assigned the ATB service indicator (ARQ)
* Registration staff should not change ATB students’ programs
* For more information, see the [Ability to Benefit](file:///I:\Ability%20To%20Benefit) folder in the Share drive

## **Career Pathway Eligibility**

The following certificates and degrees at SCC are approved career pathways that require no additional documentation:

| **Certificates** | **AAS** |
| --- | --- |
| Accounting Clerk | Accounting Assistant |
| Baking: Professional Pastries & Specialty Cakes | Administrative Assistant |
| Business Occupations | Administrative Office Management |
| Clerical Assistant | Automotive Technology |
| Front Office Professional | Aviation Maintenance Technology |
| Industrial and Manufacturing Technology | Business General |
| Legal Office Software Specialist | Business Software Specialist |
| Legal Receptionist | Culinary Arts |
| Machinist/CNC Technology | Customer Service Representative |
| Management | Hotel and Restaurant Management |
| Medical Office Receptionist | HVAC/R |
| Paralegal | Legal Administrative |
| Pharmacy Technician | Machinist/CNC Technology |
| Resort Food and Beverage | Management |
| Resort Lodging | Medical Office Billing and Coding |
| Resort Management | Medical Office Specialist |
|  | Paralegal |
|  | Pharmacy Technician |
|  | Restaurant Management |

# **High School Completion**

**Navigator > Financial Aid > Federal Application Data > Correct 20xx-20xx ISIR Records**

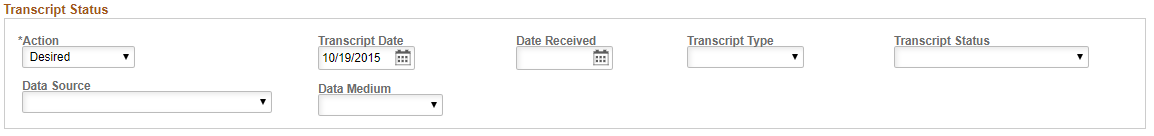
Students are required to confirm high school completion at the time of admission to the college. A high school completion service indicator will be added by Admissions staff to all incoming students who are required to provide documentation of high school completion; the service indicator will block enrollment activity.

For Financial Aid, the student’s high school completion status on the ISIR should be either **High School Diploma**, **GED**, or **Home Schooled**. If **None of the above** is checked, a checklist item will automatically be added to the student’s record upon ISIR import. The student should then correct the FAFSA or provide us with a copy of the high school diploma or transcript, a copy of the GED certificate or transcript, or homeschool completion information to allow us to correct the ISIR.

## **Recent High School Graduates**

**Navigator > Records and Enrollment > Transfer Credit Evaluation > External Education**

* Students who have recently graduated high school must provide us with a copy of their high school diploma, as they would have answered no to high school completion on the admissions application and/or the FAFSA
  + Once the Admissions Office has received a copy of the transcript or diploma, this section will be completed all the way through



# **Program of Study (Career Plan)**

**Navigator > Campus Community > Student Services Center**

**Definitions:**

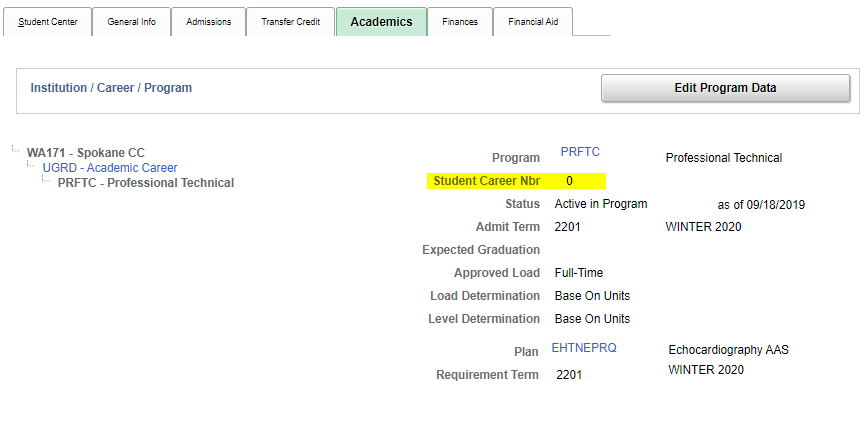
**Program stack:** list of programs the student has applied to (sorted by college)

**Program**: Academic or Professional Technical (ACADM and PRFTC)

**Plan**: Academic degrees (i.e. Associate of Arts) or Professional/Technical degrees (i.e. Culinary Arts)

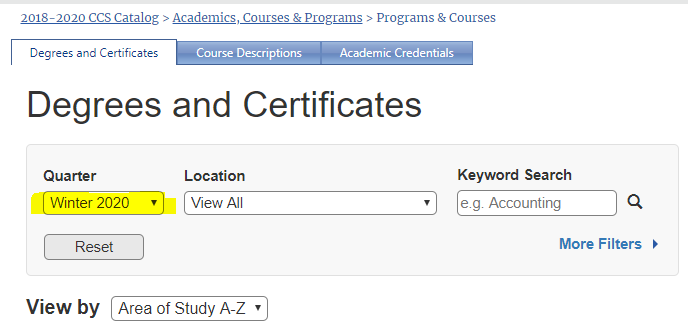
**CAR:** Career (or Student Career Number)

* Go to the Academics tab
* Click on each item in the program stack to find the most current program
  + Status will show Active as of mmddyyy
  + The **Student Career Nbr** (CAR) should be an active program and should be the CAR attached to the current (or upcoming) term in **Edit Term Data**



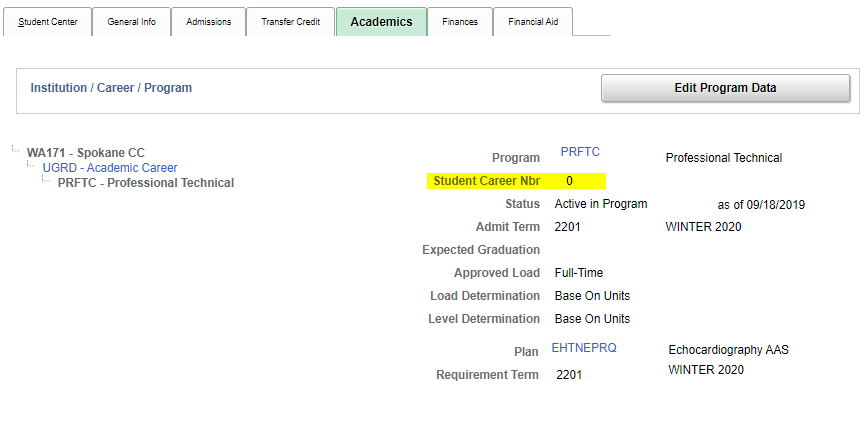
* Make sure the program is eligible to receive financial aid; if it’s not an eligible program, the student cannot be awarded
  + Click on the degree name by **Plan** in the **Edit Program Data** section
  + The short description should start with 9 if it’s financial aid eligible; 0 if it’s not eligible
* With most AAS programs, the student is not considered admitted to the program unless they have been placed in an “admitted” student group (General Info tab, Student Groups link). Associate of Arts students are not placed in a student group.
* If the student is completing prerequisites to be admitted to a program, or is completing preparatory coursework to be admitted to a program at another school, s/he will be eligible for student loans only, with a reduced subsidized maximum of $2,625, for a period of 12 months.
* If the program listed does not require prerequisites but the student has not yet been admitted, we cannot offer funding. The student **must** be admitted to the program to receive financial aid, even if they are taking “non-program-specific courses (classes that are not exclusively part of a particular program) that are required as part of their program.
* If the student is enrolled, review the courses to make certain they are required for the listed program of study
  + The Requirement Term indicates the program outline that should be used to verify the student is taking program-required courses. If the Requirement Term is **Fall 2016**, for example, the Fall 2016 program outline should be consulted for acceptable courses.

Program outlines: <http://catalog.spokane.edu/CoursesAndPrograms/Default.aspx>

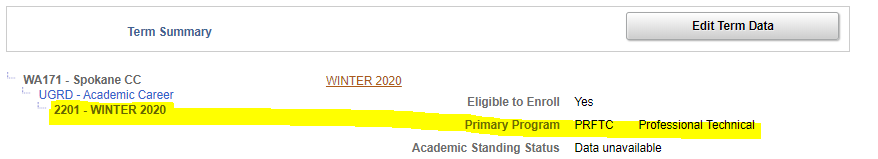


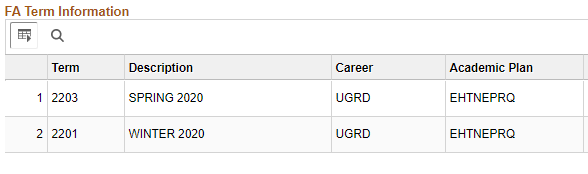
**These things must be connected to the same plan:**

|  |  |
| --- | --- |
| * **Student Career Number in Program/Plan** **should match CAR number in Edit Term Data** * **Active Program Plan must match plan linked to current term in Term Summary** | * **FA Terms** **and Edit Term Data CAR should match** * **SAP must match CAR number in Edit Term Data** * **SAP & FA Terms** **should match** |

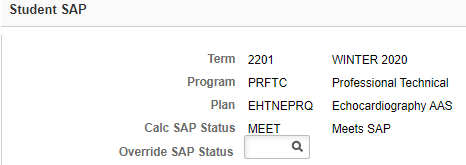
**Student Services > Academic Tab**

**Edit Term Data Window**



**View Financial Aid Status (FA Term Information section)**

**Maintain Student SAP Data (Student SAP section)**

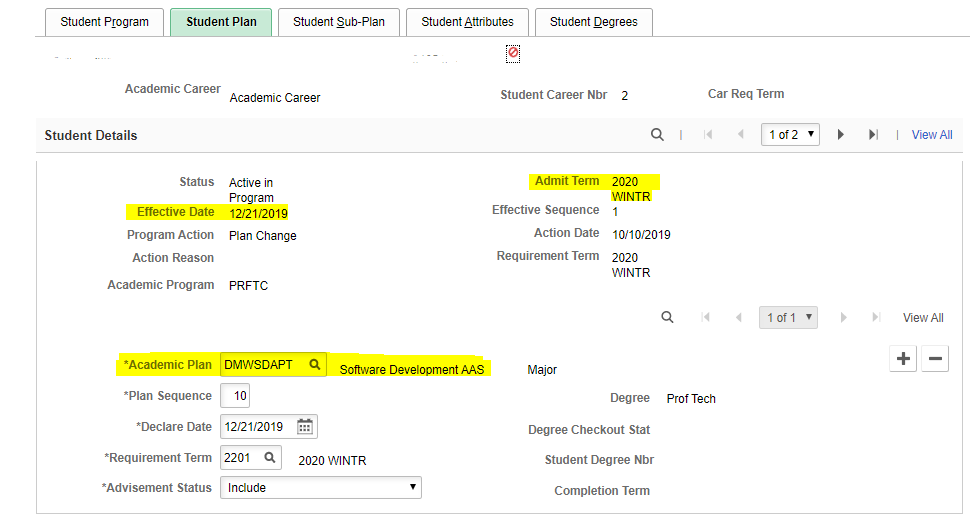


## **Troubleshooting Students Career Plans**

### **Program Updates – Future-Dated Program Changes**

**Navigator > Records and Enrollment > Career and Program Information > Student Program/Plan**

If the student hasn’t attended for a while, check to see if a Student Information Update form has been processed as a “future-dated” program change before advising the student to submit another update form.



### **Multiple Plans in Program Stack**

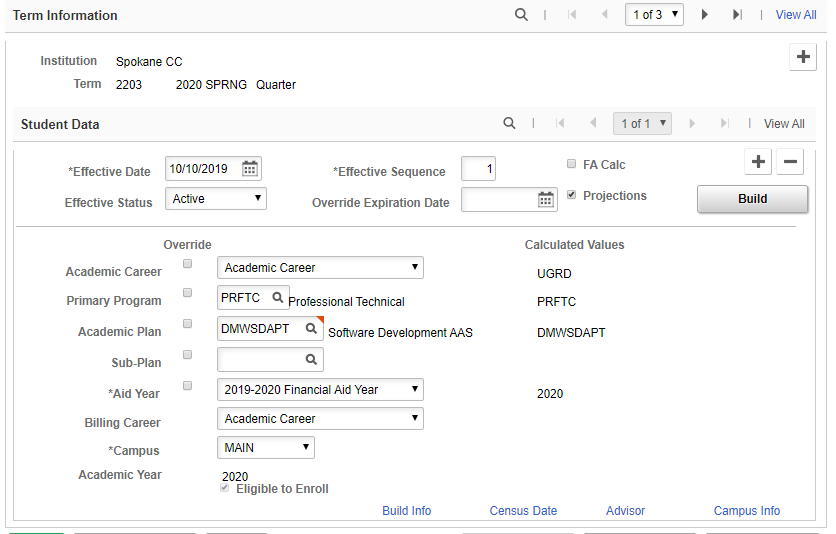
Ideally, there will be only instance of ACADM or PRFTC (or one of both) in the program stack, and only one **active** plan in either program. Due to the 2015 conversion to ctcLink, in some records there will frequently be multiple instances of ACADM and PRFTC in the stack listing different ACADM or PRFTC plans. Again, ideally, for these students there should only be one active plan and all the rest should be discontinued.

If there are multiple active plans in program stacks, click the current term in the Term Summary section, then click the Edit Term Data button. Note the CAR number, then find that plan in the program stack. That should be the student’s current program. If there is no plan with that CAR number, check the **Student Program/Plan** page for a future-dated program.

If in doubt, check halFILE for the latest Student Information Update form, and if still unsure, contact the student to ask what program they intend to complete.

**What to do if the plans don’t match:**

* If SAP is the only thing not matching, SAP will update when the job is run for the current quarter. As long as the FA Term shows the correct plan, SAP should update the plan accordingly.
* If FA Terms are the only things that don’t match (usually in this case, SAP won’t match either) and you’re certain the plan is correct in Academics, you can change the plan for the term or terms involved. (You will not need to do this if the plan was just changed that day; the system will update overnight.)
  + **Navigator > Financial Aid > Financial Aid Term > Maintain Student FA Term**
  + Scroll using the ⏴⏵arrows in the Term Information section
  + For each quarter affected, click the 🞥 in the Student Data section to add a new row
  + Now you can change the Prim Prog or Acad Plan (or both if necessary) to the appropriate ones
  + Click Save



* + **Navigator > Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data**
  + Enter the term they will be starting and click the Calc SAP button



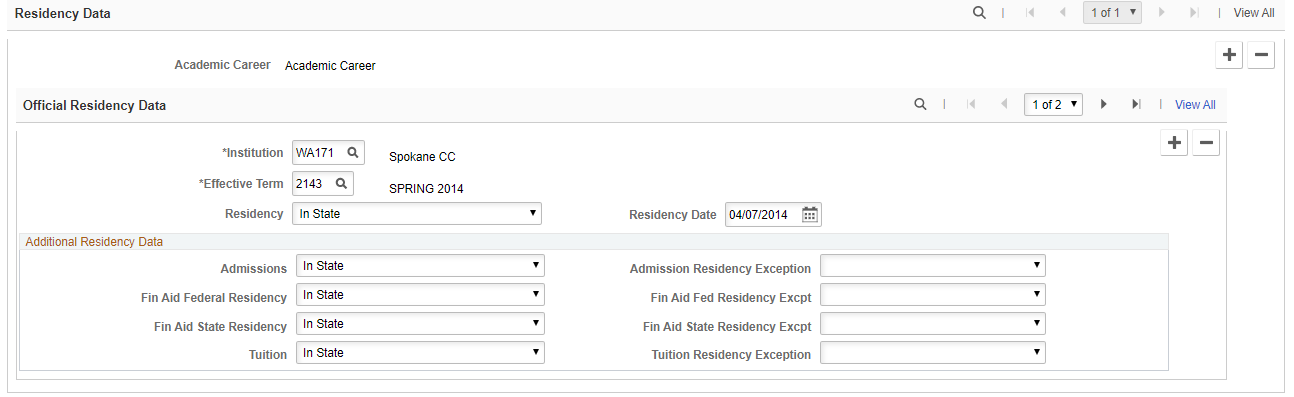
* If the plan in **Navigator > Campus Community > Student Services Center,** **Academics tab, Term Summary** **section** doesn’t match the most recent plan in **Navigator > Campus Community > Student Services Center,** **Academics tab, Institution / Career / Program section**, email the Registration team and request that the affected Term Summary quarters be linked to the correct plan. (This most frequently happens when students change from Transitional Studies to UGRD-Academic Career, but occasionally a plan will be changed without it being linked to the current term.)

# **Residency**

**Navigator > Campus Community > Personal Information > Identification > Residency Data**

Academic Career: if this says “**Continuing Education**,” use the scroll arrows to scroll to the next row, which should say “**Academic Career**.”

Student’s residency is in the **Official Residency Data** section, **Residency** field.



NOTE: Some students may have an exception, so they may pay in-state tuition but be a non-resident for FA purposes. There should be something noted by the exemption on the right that pertains to their situations as well as a comment on the View Financial Aid Status page. Also, be sure to look at the Residency Appeal tab regarding any notes on appeals the student may have filed. If in doubt, email the Residency Classification staff to get clarification.

## **Residency Mismatch**

Do not complete the file and award until the residency mismatch is resolved; there is no way to tell what budget will be appropriate until they resolve the issue. Put in a Temp sleeve and notify the student of their next steps.

### **Non-resident in Admissions and Resident on FAFSA**

* **If the student will become a Washington State resident within the academic year**
  + **Do not** change the FAFSA
  + Complete the Residency Mismatch checklist item (both tabs)
  + Student will have a non-resident cost of attendance until they are officially changed to a resident
  + **Do not** award state aid of any kind until we are notified by the Residency Office that the student has become a resident
    - State aid can only be funded starting with the term the student became a resident
  + Add a comment on the Financial Aid Status page to the effect of “Student will become a resident within the XX-XX academic year”
* **If the student will not become a resident during the academic year**
  + Instruct the student to change their state of residence and residency date on their FAFSA
  + **Do not** waive, complete, or cancel the Residency Mismatch checklist item – the system will waive this when the FAFSA correction is loaded
  + **Do not** award any state aid; the student will not be eligible at any time during the academic year
  + Add a comment on the Financial Aid Status page to the effect of “Student will not become a resident with the XX-XX academic year”
* **When non-resident student becomes a resident within academic year**
  + Adjust cost of attendance on the file processing worksheet for affected terms
  + Check the cost of attendance to make sure the budget updated to resident amounts; manually fix relevant cost of attendance elements if they are still showing non-resident amounts for all relevant terms
  + Award any eligible state grant aid
  + Add a comment on the Financial Aid Status page to the effect of “Student became WA resident as of XXXX Quarter”

### **Resident in Admissions and Non-Resident on FAFSA**

* If the student actually is a resident:
  + Instruct them to change their state of residence and date of residency on their FAFSA
  + **Do not** complete, waive, or cancel the Residency Mismatch checklist item; the system will automatically waive this when the FAFSA correction is loaded
  + When the FAFSA correction is loaded, check the cost of attendance to make sure the budget updated to resident amounts; manually fix relevant cost of attendance elements if they are still showing non-resident amounts for all relevant terms

**Navigator > Financial Aid > Budgets > Maintain Term Budgets**

* If the student is actually a non-resident:
  + No FAFSA correction is required
  + Refer the student to the Residency Office to complete a residency questionnaire
  + **Do not** complete, waive, or cancel the Residency Mismatch checklist item
  + TEMP the file with a comment on the Financial Aid Status page to the effect of “Student indicates s/he should be coded as non-resident; referred to Residency Office” – review and awarding cannot be completed until the residency issue is resolved

# **Citizenship**

## **Comment Codes**

Pay close attention to what citizenship issue is reflected on the FAFSA; each requires different documents and/or resolutions. *See current academic year’s SAR Comment Codes and Text* *for resolution on a specific comment code at* [*https://ifap.ed.gov/ifap/publications.jsp*](https://ifap.ed.gov/ifap/publications.jsp)*.*

## **Documentation**

* Citizenship documents must be copies that we made of the original documents.
* For V4 or V5 verification groups, government-issued photo identification, including passports, **cannot be expired**
* For proof of U.S. citizenship, an expired passport is acceptable
* For third-step confirmation of citizenship status (through SAVE – formerly the form G-845), we must have the most current, non-expired documentation
* We can use documents scanned into Halfile by Admissions/Registration Office with the assumption that they took copies of the original documents

## **Secondary Confirmation – ISIR**

If citizenship match isn’t made on the first ISIR, secondary confirmation will be needed. The ISIR will look like this on the **EFC/DB Matches/Corr** tab (the DHS verification number will be different for every student and every transaction):



Secondary confirmation must be performed for these students and must be done through FAA Access (<https://faaaccess.ed.gov/FOTWWebApp/faa/faa.jsp>).

Once logged in to FAA Access, pull up the student’s record, then:

* Click the transaction number you need to correct (it most likely will be 01, but not always; there may be previous transactions SCC doesn’t have access to)
* Click the Make Corrections button
* Click Next to bypass creating a transaction password
* Click “bottom” in the links above the FAFSA data
* In Step 7, click the down arrow in the field **Resend Record to Matches**
* Select Yes
* Click the Submit button

CPS will reprocess the record and send an updated transaction. Look at the **EFC/DB Matches/Corr** tab to see if citizenship was confirmed.

* **Y match flag**: successful confirmation; no further steps required
* **C match flag**: citizenship status has not yet been verified; wait 10 business days for another ISIR with an updated match result; iIf there is no update, begin third step verification through SAVE (comment code 105)
* **N match flag**: immigration status was not confirmed; begin third step verification through SAVE (comment code 046)
* **X match flag**: DHS did not have enough information to make a determination; begin third step verification through SAVE (comment code 109)

## **SAVE System**

**Navigation**: <https://save.uscis.gov/web/vislogin.aspx>

Occasionally, third step verification of citizenship status is required for a student. Form G-845, available from United States Citizenship and Immigration Services (USCIS), has been replaced with the electronic system SAVE. Form G-845 will still be used in rare instances, but most third-step verifications will be done through SAVE.

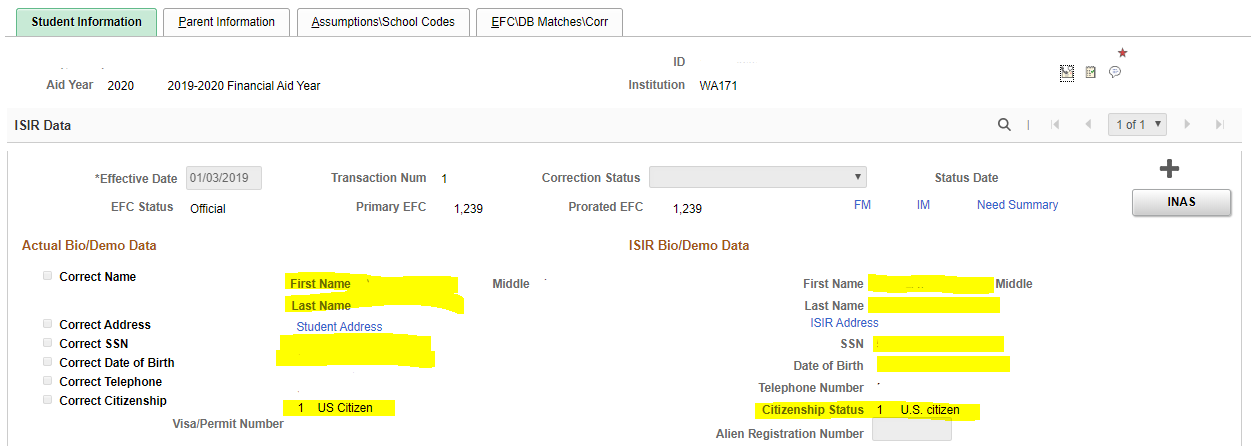
# **ISIR vs Bio Demo Mismatch & Residency Mismatch**

**Actual Bio/Demo Data and ISIR Bio/Demo Data**

* These items must match in both sections:
  + Name (middle initial does not matter)
  + SSN
  + Date of Birth
  + Citizenship – the table below shows the only acceptable matches:

|  |  |
| --- | --- |
| Actual Bio/Demo Data | ISIR Bio/Demo Data |
| U.S. Citizen | U.S. Citizen |
| Perm Resident  Resident | Eligible Non-Citizen |
| Not a Citizen  Ineligible Non-Citizen | \*Ineligible for aid\* |

**Note**: Resident in Actual Bio/Demo Data is not a match for U.S. Citizen in ISIR Bio/Demo Data; it could be that the student has become a naturalized citizen and failed to provide the Admissions Office with a copy of the naturalization certificate. Mismatches in any of the above must be resolved before we can award. The Admissions office will accept a screen shot of the SSA ISIR match (match flag 4) in lieu of other documentation.



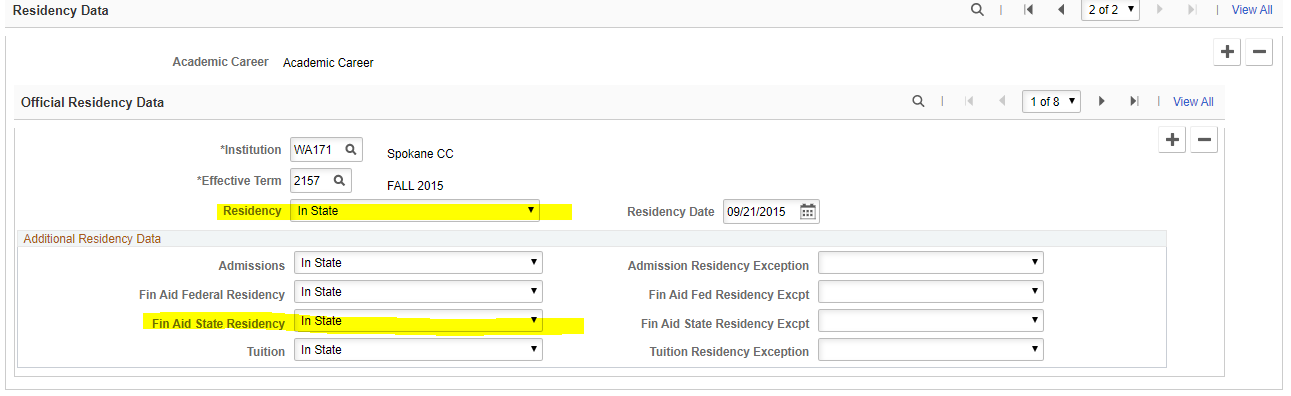
* State of residence in ISIR BIO/Demo Data must reflect the student’s residency status in the student’s admission records:

**Navigator > Campus Community > Personal Information > Identification > Residency Data**

* + If Academic Career says “Continuing Education,” scroll to the next row, which should be “Academic Career”
  + Washington resident will say “In State”
  + Non-resident will say “Out of State”

Residency exceptions will be noted on the right hand side of the Residency Data page in the Residency Official 1 tab. Sometimes a student can be a resident for tuition purposes but not for financial aid (such as military dependents). An exception like that would show in that section.

**Residency**



**ISIR**



# **NSLDS**

<https://www.nsldsfap.ed.gov/nslds_FAP/>

**Navigator > Financial Aid > Awards > View NSLDS Loan Data**

It’s best to look at the NSLDS website rather than what is in ctcLink to get the most recent information.

* Print Loan page, Grants page, and SULA page
  + Mark each page with “PII” (Personally Identifying Information) and your initials
  + SULA information: click the **Enroll** tab, and then click the **Subsidized Usage** button

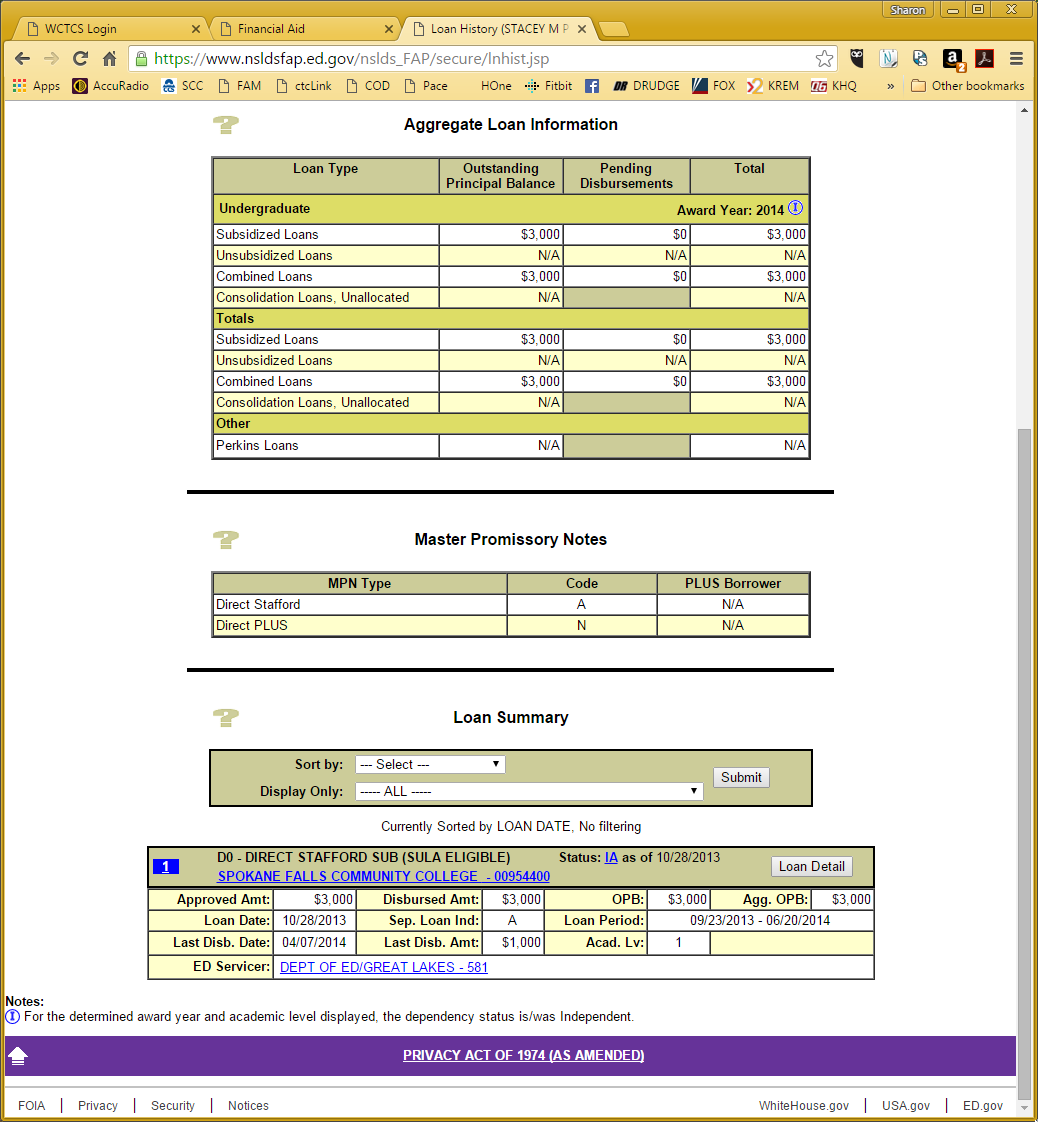
## **Loan Page**

* Pay special attention to **Pending Disbursements** column
* Make sure the student hasn’t exceeded maximum aggregate loan limits for undergraduate students:
  + Subsidized aggregate: $23,000
  + Combined aggregate (subsidized and unsubsidized):

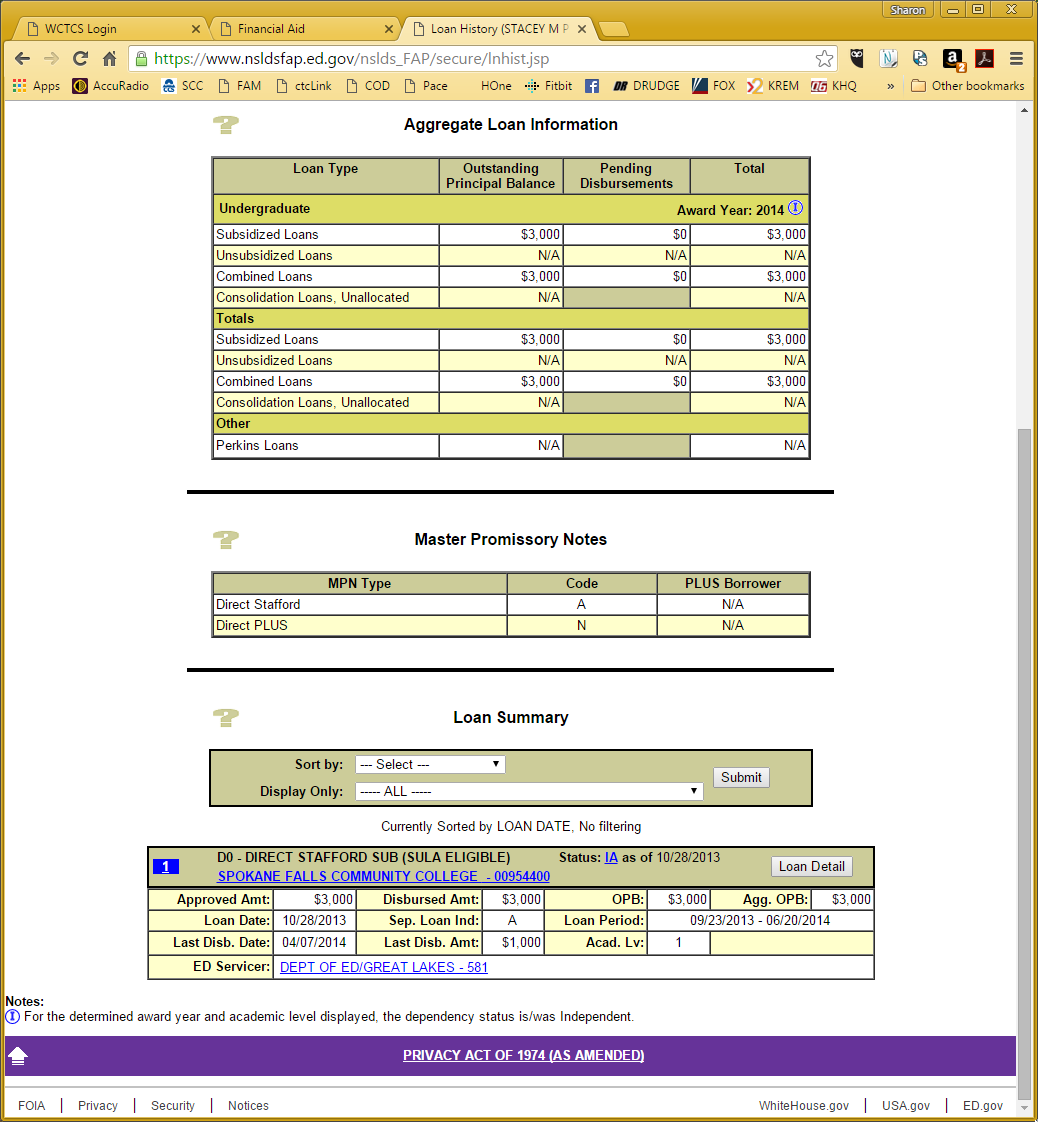
$57,500 independent students

$31,000 dependent students

* If the student is close to one or both aggregate limits, loan funds will be limited to what is left – we cannot exceed aggregate loan limits
* If the student already exceeds one or both aggregate loan limits, s/he will not be eligible for **any** financial aid

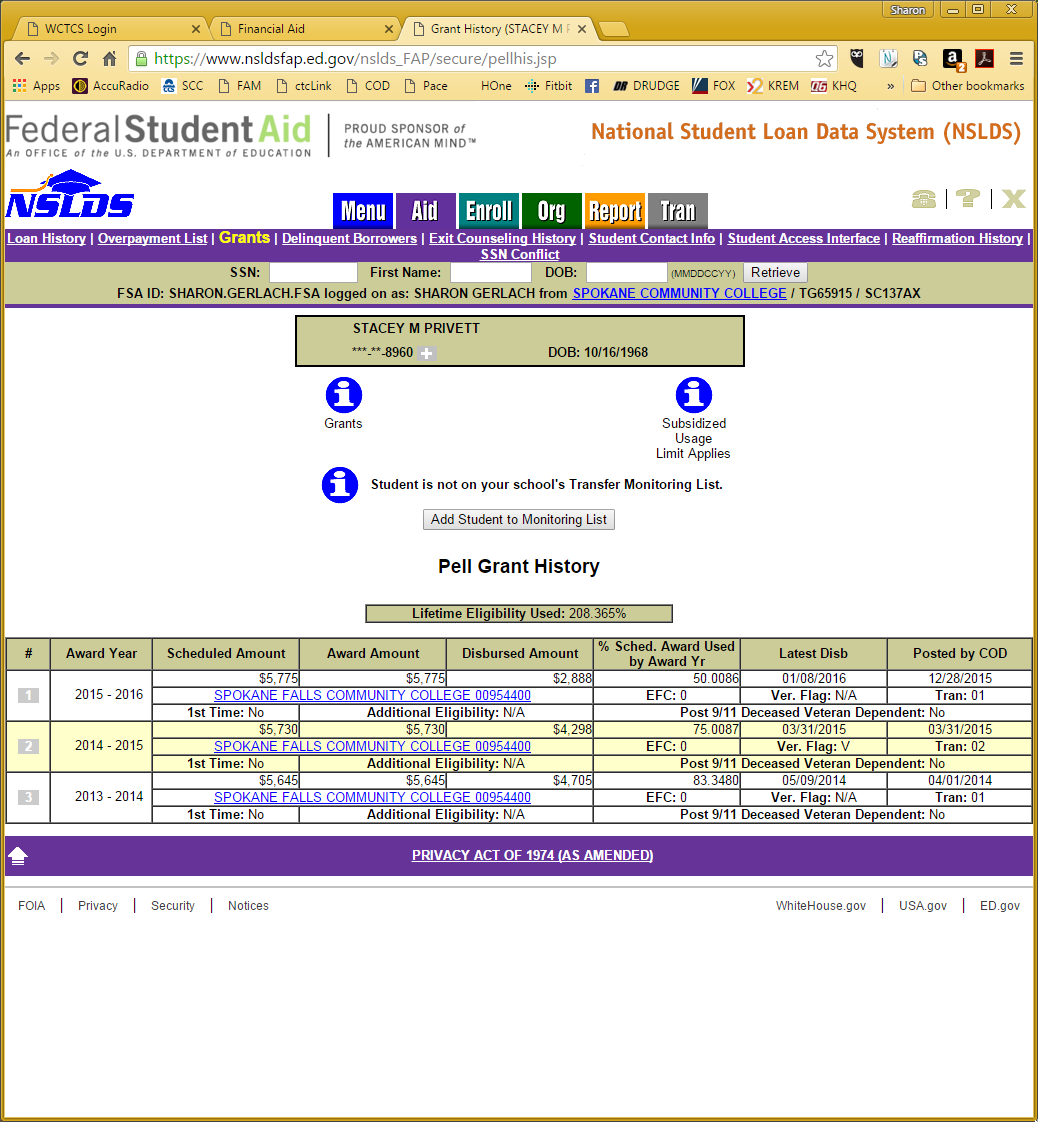


* Make sure there are no pending loan disbursements (Loan History):
  + If there are pending disbursements, we cannot award until the other school cancels the student’s awards and/or reports the loan changes
    - Add checklist item ESP086 (Active Aid at Another College) to student’s ctcLink record

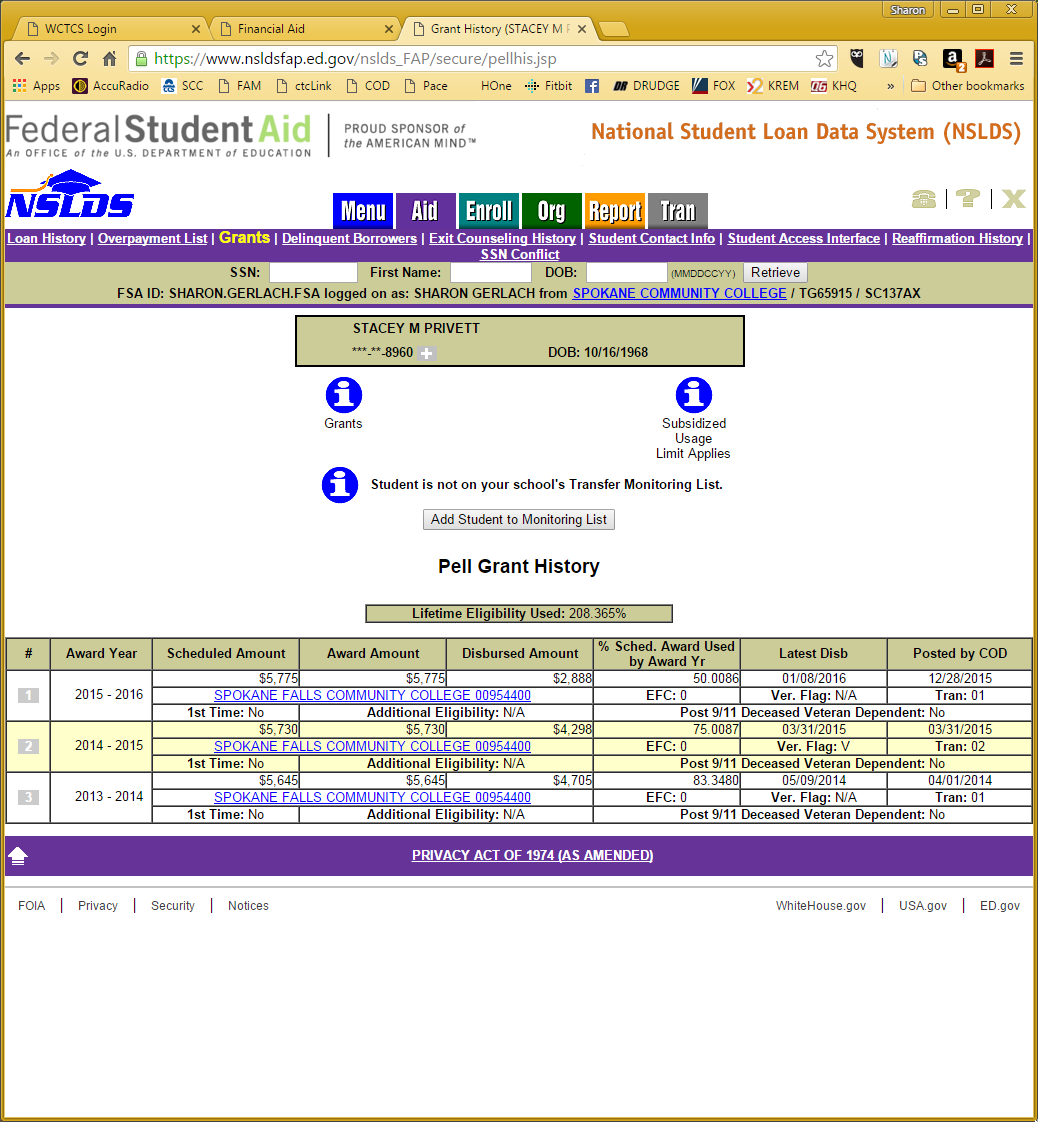


## **Pell Page**

* Check Pell to see if anything has been disbursed at another school (Grants):



* If the student has been awarded at another school in the current academic year, we are limited to what has not been used
  + In the example below, the student has used 50.0086% ($2,888) of the annual award.
    - If the EFC has not changed, the student would be eligible to receive 49.9914% of the scheduled $5,775 ($2887)
    - If the EFC has changed, the student is eligible to receive 49.9914% of the scheduled award for the new EFC
    - Make notes on file worksheet showing what has been used and what is remaining
  + **Add a comment to the View Financial Aid Status page:**
    - $2888/50.0086% used at Other University Name



## **Pell Lifetime Eligibility Used (LEU)**

* If the Pell LEU percentage is close to or over 500%
  + Log in to the Common Origination and Disbursement (COD) system at <https://cod.ed.gov>.
  + Enter the student’s SSN and click the **Search** button
  + Click the **Pell** link
  + Click the **Full Pell LEU History** link
  + Print the Pell LEU History page and mark with PII and your initials
  + Add up all **Total Percent Eligibility Used** line amounts, excluding any for the current academic year
  + Subtract the grand total from 600%
  + The remainder is what is left in the student’s lifetime eligibility

**Example 1**: 600% - 461.6651% used = 138.3349% remaining (is OK to award a full year of Pell for current academic year)

**Example2** : 600% - 561.6651% used = 38.3349% remaining (multiply full scheduled Pell award by .383349 to get maximum amount of Pell the student can receive in the current academic year: $5920 x .383349 = $2269.42 – the student can receive $2269 in Pell Grant

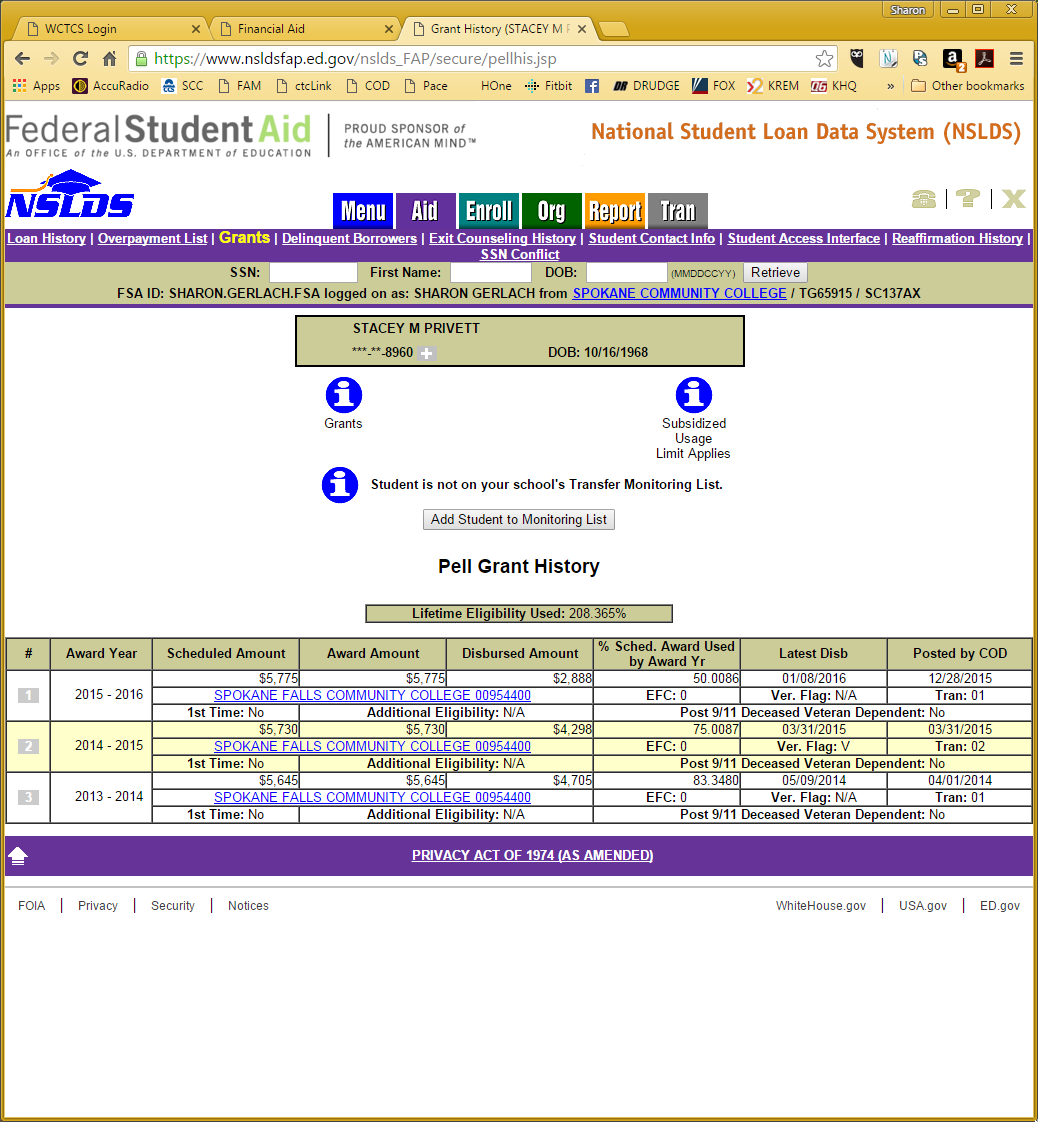
* + If the student is eligible for less than a full scheduled award, the remainder of eligibility must be disbursed with the full amount the student is eligible for per enrollment, with the uneven remainder in the last quarter of eligibility

**Example 1:** $1973 in Fall Quarter for full-time

$296 in Winter Quarter – the remaining LEU eligibility

**Example** 2: $1480 in Fall Quarter for three-quarter time

$789 in Winter Quarter – the remaining LEU eligibility



## **Subsidized Usage Limit Applies (SULA)**

SULA was repealed as of June 2021.

## **Updating Incoming Aggregate Amounts**

**Navigator > Financial Aid > Awards > Aggregates > Update Incoming Aggregates**

Be sure to check the incoming aggregate amounts against the amounts in NSLDS. Students apply early, and the incoming aggregates don’t update with new ISIR information.

For students who have limited eligibility for the academic year, these aggregates should be updated according to the amounts in NSLDS before awarding, so that Pell and loans don’t reject.

For others, sometimes the incoming aggregate comes in with all 9’s in the Percent Schedule Used field, which will trigger an awarding error code (usually code 9111); these students will need to be updated to the correct amount to enable awarding.

* Enter student’s EMPLID number and Search
* Click on the funding source you want to update
  + Be sure to update only SCC’s incoming aggregates; do not update SFCC’s
  + Be sure to update all funding sources
* Check Override box next to Lifetime Eligibility Used (Pell) or NSLDS Total (Subsidized and Unsubsidized loans)
* Enter the correct amount according to NSLDS
* Save

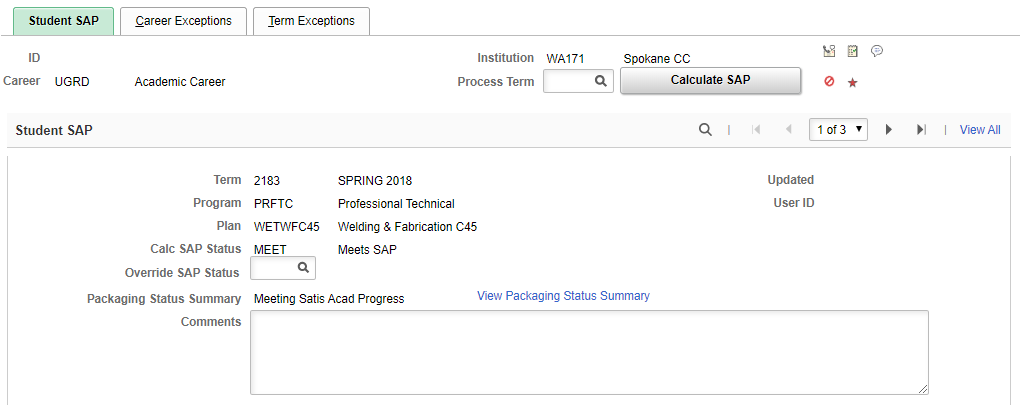
# **Satisfactory Academic Progress**

**Navigator > Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data**

## **Student SAP Section**

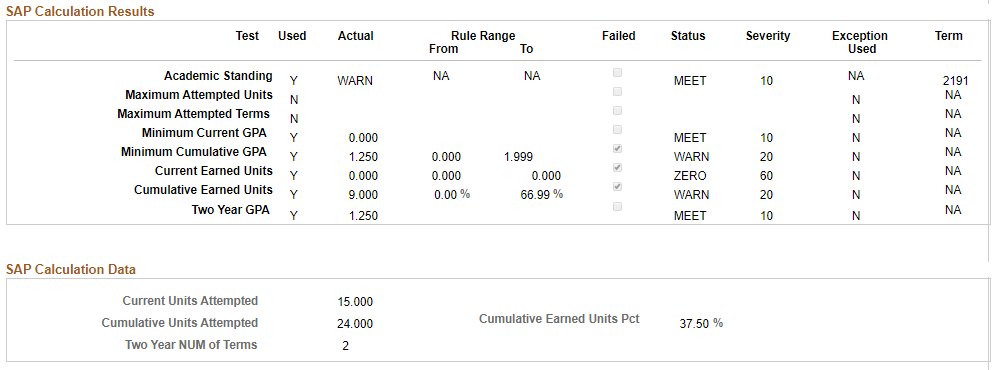
**Do not manually run SAP UNLESS:**

* The student has no SAP status (blank screen) and should be a status other than MEET, or if student should be a status other than what shows on the SAP screen
* The student’s status will be MEET or WARN and SAP page is blank and SAP job has already been run to update for the next quarter (or current quarter, if awarding after the quarter has begun)
* Follow these steps to run SAP manually:
  + Enter the term the student will start attending and click the Calc SAP button
  + If the status doesn’t change to the correct one, enter correct status in **Override SAP Status** and save



NOTE: SAP will not run if the student has alternative funding. In that instance, if SAP must be run before you award, enter in $1 of federal aid such as Pell, run SAP, and then remove the $1 from the awards page.

## **SAP Calculation Results**

* Check cumulative earned credits to be sure student isn’t close to or over 150%
  + Look in Halfile or in previous years’ physical file to see if there is a current academic plan in place; previous plans should also be noted in comments in the previous academic year Financial Aid Status page
  + If student is close to the end of program or close to 150% of program length, request an academic plan before awarding
* IMPORTANT! If the student has not attended for several quarters, SAP might reset to MEET when it should be a different status. It is important to check the status of all students who have a SAP history.
  + Scroll through previous rows to see if there was a previous status other than MEET
  + Check student’s enrollment since the status other than MEET occurred
    - If student hasn’t attended since that term, override the SAP to what it previously was after their last term
    - If student has attended successfully since that term, no action needed
* Check to be sure a student being placed on SUSP when SAP is run wasn’t in just ABE classes that quarter (generally speaking, ABE credits are entered as an exception in the Career Exceptions tab and are entered by the Grade Team each quarter)

## **Simulate Student Eligibility**

Sometimes the student won’t have a SAP row for the current term; this happens when the student was last enrolled in a Spring quarter and did not have a FAFSA for the upcoming academic year. This option determines the student’s eligibility without actually running SAP.

* Enter the student’s ID number in the **ID** field and Search
* In the **Process Term** field, enter the upcoming term
* Click the Calculate SAP button
* Research any status that is not financial aid-eligible to make sure the system is assessing the correct status
  + Have one of the SAP Team members look at the student’s progress if SAP status appears to be incorrect

## **EXHS status (formerly “GD” Suspension)**

* Students who have exhausted their eligibility to appeal will need to attend at own expense, which requires an academic plan so classes and progress can be tracked
* EXHS students will be assigned a user-edit message with the Msg Type of Informational and the Msg Code of GDSUSP

## **SAP Contracts and Attending at Own Expense**

* Students under SAP contracts
  + Are put on SAP contracts only if appealing a suspension
  + Ad hoc communications outline the terms of the contract and can be viewed in the Communications section of the Financial Aid Status page
  + SAP contract details are also noted on the Maintain Student SAP Data page in the Comments section
  + Contract terms are based on calculations performed to determine the possibility and the timeframe of getting the student back to acceptable standards
  + A User-Edit Message is added to each contracted student’s record, with the Msg Type of Informational and the Msg Code of FPLAN
* Students attending at their own expense (self-paying)
  + Academic plans are required for DTA/MRP programs
    - Technical programs don’t require an academic plan; let the SAP team know the student is self-paying to regain eligibility so that the appropriate tracking can be added to the student’s record
    - A User-Edit Message is added to each self-paying student’s record by SAP team, with the Msg Type of Informational and the Msg Code of @OWN

## **Graded Adult Basic Education Coursework**

At this time, students who are enrolled in graded Adult Basic Education coursework are subject to satisfactory progress policies, to be applied the same as to any other student.

## **Non-Graded Adult Basic Education Coursework**

Non-graded Adult Basic Education (ABE) credits will be excluded from the student’s SAP calculation. The number of non-graded ABE credits for the term will be added by the SAP team to the **Career Exceptions** tab in the **Cum Att Units to Exclude** field.

## **Actions to Take for Ineligible SAP Status**

The only eligible SAP statuses are MEET, WARN, and PROB. If the student’s record displays any other status, the student is not currently eligible for financial aid funding.

For students displaying an ineligible status:

* Send the student a letter directing them to the PDF or online appeal forms
  + If the student is EXHS due to it being mathematically impossible to achieve SAP, do not have the student appeal; they are ineligible for appeals
    - If the student changes programs, alert SAP staff so the student’s requirements can be re-evaluated
  + If the student is EXHS due to exceeding number of allowed appeals, inform the student of the “at own expense” process
* Add the appropriate SAP Appeal checklist item (unless status is EXHS)
  + Check the Financial Aid Status Page first to see if there are existing SAP Appeal checklist item types already used, then choose the next one in the series
* TEMP the file in the correct color file sleeve
  + Don’t forget to add the TEMP comment on the FA Status page

**SAP Status Chart**

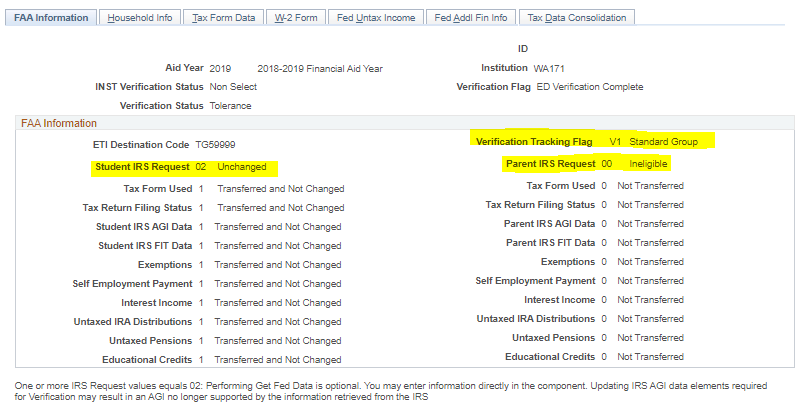
|  |  |  |
| --- | --- | --- |
| **SAP Status Code** | **Description** | **Reason/Result** |
| **ACAD** | SR-Academic Suspension | Student failed to meet academic standards according to policy  Student is prevented from enrolling for the period of time specified in the academic suspension service indicator |
| **EXHS**  (aka GD SUSP in comments) | Exhausted Eligibility-Calculated | Student will be unable to meet required SAP standards before degree is completed OR student has exhausted the two allowed appeals and a subsequent appeal has been denied  Student may not receive funding for that particular degree; this status can be recalculated if the student changes degrees  OR  If EXHS due to exhausting allowed number of appeals, student must attend at own expense until meeting the required standards (“at own expense” requires an academic plan)  Blocks future disbursements |
| **FLEX** | Failed Student Exception | Failed to meet terms set in Career Exceptions tab  Blocks future disbursements |
| **MEET** | Meets SAP | Student met SAP standards |
| **PROB** | Probation-Manually Assigned | Student was on a suspension status of some form, but either appealed or attended successfully at own expense |
| **SUSP** | Suspension-Calculated | Student did not meet SAP standards according to the final grade posting  Blocks future disbursement |
| **WARN** | Warning-Calculated | Student did not quite meet all SAP standards but enough to avoid Suspension; must meet all requirements in the next term to avoid suspension |
| **ZERO** | Zero Units Earned-Calculated | Student earned no passing grades (all 0.0 or Z grades) according to the final grade posting (occasionally calculates ZERO for official withdrawals)  Blocks future disbursements |

# **Verification**

There are three steps to the verification process: Manage 20xx-20xx Verification, Perform Auto Verification, and Correct 20xx-20xx ISIR Records.

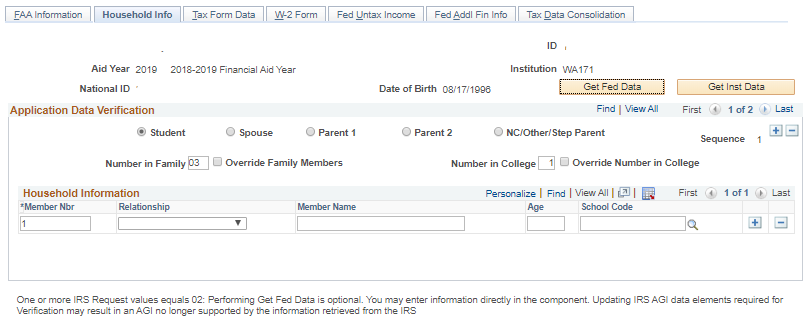
## **Step 1: Manage 20xx-20xx Verification**

**Navigator > Financial Aid > Verification > Manage 20xx-20xx Verification**

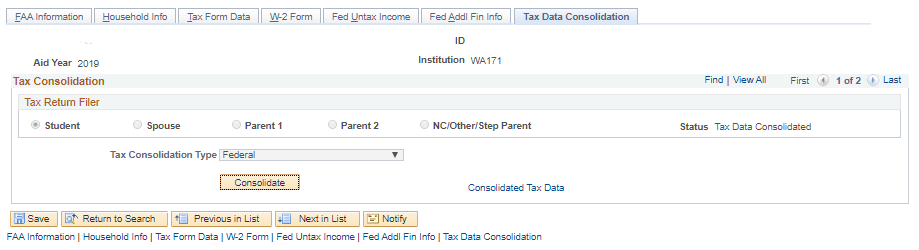


**Tabs we use:**

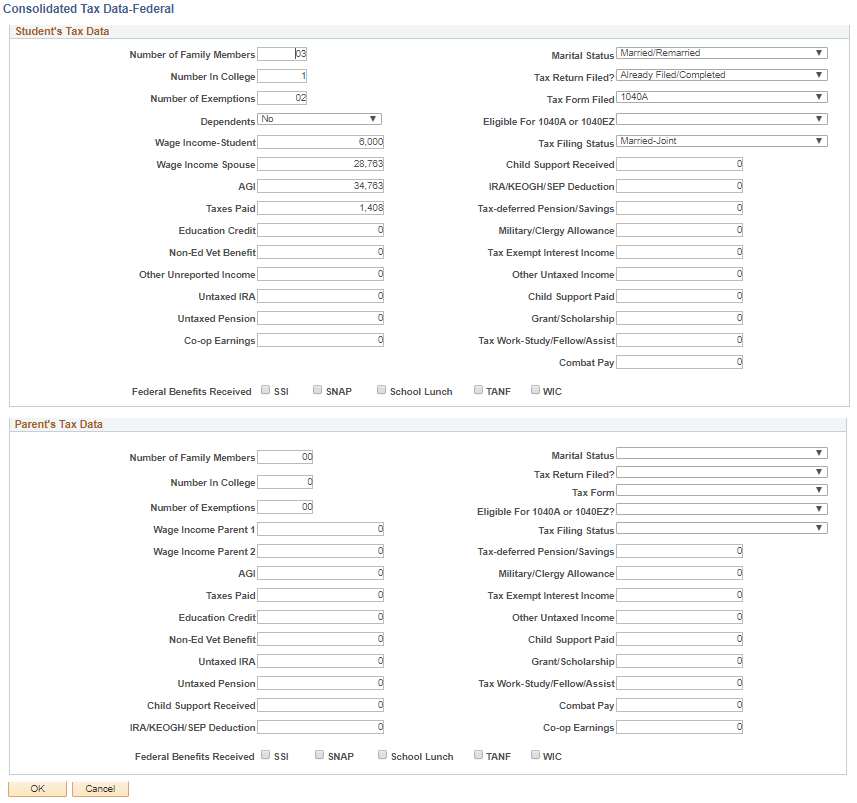
* **FAA Information tab**
  + Student IRS Request: 02 Unchanged means student or parent used the IRS Data Retrieval Tool and did not change anything after the data was imported to the FAFSA
    - Anything other than 02 Unchanged requires a paper tax return or transcript
  + Verification Tracking Flag: Shows the type of verification
    - Make sure the student submitted the appropriate verification worksheet
      * We can verify a V1 verification using the V5 verification worksheet if the student mistakenly turned in the wrong one; V5 contains everything required to be verified on V1
* **Household Info tab**
  + Click the Get Fed Data button
    - If Independent, compare number in household to the verification worksheet
      * Correct the numbers according to the verification worksheet
      * Check the box next to Override Family Members
    - If Dependent, scroll to the next row and compare the household number to the verification worksheet
      * If the parents are divorced, make sure the student is using the same parent on the verification documentation as on the FAFSA
      * Correct the numbers according to the verification worksheet
        + Remember that if the parent is also in college, they cannot include themselves in the number in college



* **Tax Data Consolidation tab**
  + Click the Consolidate button



* + Once the data has been consolidated, click the **Consolidated Tax Data** link
    - All required verification fields will show here. Verify only what is required by the type of verification it is (**Required Fields for All Verification Tracking Groups**)
    - Make any necessary corrections
    - Click OK
    - Click Save – **even if you made no changes**



**Other tabs: (most of these will be pulled into the Tax Data Consolidation)**

* Tax Form Data tab (generally not used)
* W-2 Form tab (generally not used)
* Fed Untax Income tab
* Fed Addl Fin Info tab
* Inst Untax Income

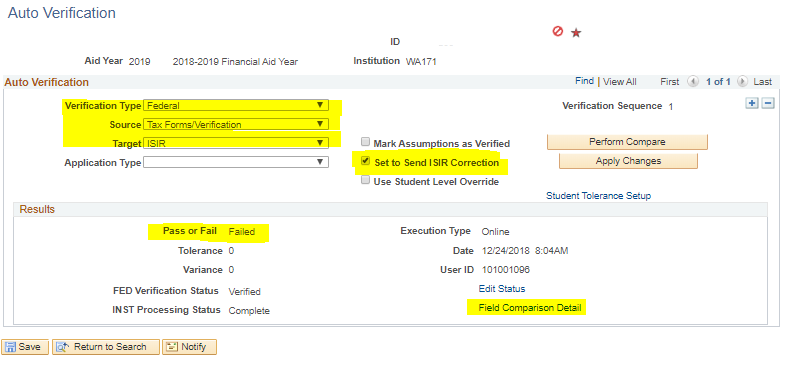
## **Step 2: Perform Auto Verification**

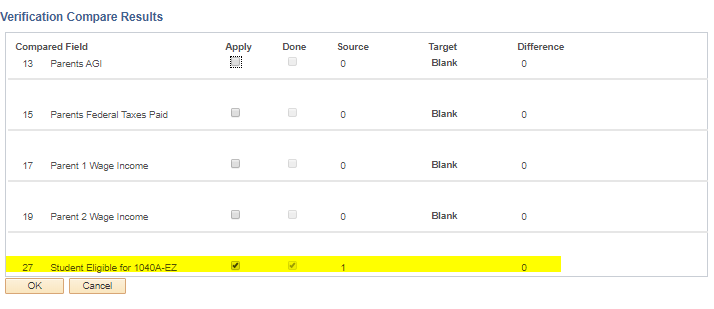
**Navigator > Financial Aid > Verification > Perform Auto Verification**

**NOTE**: In the comment section of the File Processing Worksheet, enter the transaction number you are verifying and whether you sent a correction

(EXAMPLES: “Verified #03 – sent corr” or “Verified #03 – no corr”)

* **Verification Type**: (should already be set to “Federal”)
* **Source**: Tax/Verif
* **Target**: ISIR
* If you had to make corrections, check the box next to **Set to Send ISIR Correction**
* Click the **Perform Compare** button and look at **Pass or Fail** (in the Results section)
  + If Passed, print this page and attach to the verification documentation
    - Click Save
  + If Failed, click the **Field Comparison Detail** link
    - Check the box for “Apply” next to the changes you made in Step One
    - Print this page and attach to the verification documentation
    - Click OK
    - Click **Apply Changes**
    - Click Save

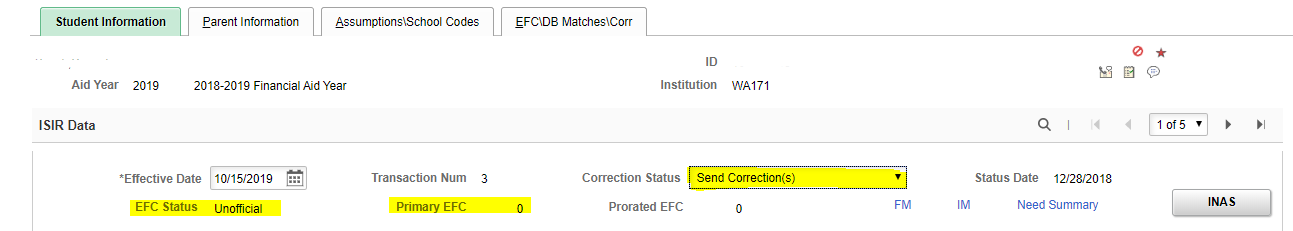




## **Step 3: Correct 20xx-20xx ISIR Records**

**Navigator > Financial Aid > Federal Application Data > Correct xxxx-xxxx ISIR Records** (you will use the current academic year in place of xxxx-xxxx)

* The ISIR **Correction Status** should already be set to **Send Correction(s)**
* Click the **INAS** button
* The new EFC should be calculated, with the EFC Status being **Unofficial**



## **Required Fields for All Verification Tracking Groups**

(Greyed out groups are not currently being used by Department of Education)

|  |  |
| --- | --- |
| **Flag** | **Required Fields** |
| V1 (Standard) | **Tax Filers**   * Adjusted Gross Income * U.S. Income Tax Paid * Untaxed Portions of Individual Retirement Account (IRA) Distributions * Untaxed Portions of Pensions * IRA Deductions and Payments * Tax Exempt Interest Income * Education Tax Credits     **Nontax Filers**   * Income Earned from Work   **Tax Filers and Nontax Filers**   * Number of Household Members * Number in College |
| V2 (SNAP)  (inactive) | * Snap benefits for prior year and prior-prior year |
| V3 (Child Support Paid)  (inactive) | * Child Support Paid by the student (or spouse), the student’s parents, or both, if indicated on the ISIR |
| V4 (Custom) | * ~~High School Completion Status~~ removed as of 2022-23 AY * Identity verification * Statement of Educational Purpose |
| V5 (Aggregate) | **Tax Filers**   * Adjusted Gross Income * U.S. Income Tax Paid * Untaxed Portions of IRA Distributions * Untaxed Portions of Pensions * IRA Deductions and Payments * Tax Exempt Interest Income * Education Tax Credits   **Nontax Filers**   * Income earned from work   **Tax Filers and Nontax Filers**   * Number of Household Members * Number in College * ~~High School Completion Status~~ removed as of 2022-23 AY * Identity verification * Statement of Educational Purpose |
| V6 (Household Resources)  (inactive) | **Tax Filers**   * Adjusted Gross Income * U.S. Income Tax Paid * Untaxed Portions of IRA Distributions * Untaxed Portions of Pensions * IRA Deductions and Payments * Tax Exempt Interest Income * Education Tax Credits   **Nontax Filers**   * Income Earned from Work   **Tax Filers and Nontax Filers**   * Other Untaxed Income on the 2015–2016 FAFSA– * Payments to tax-deferred pension and savings (Questions 45a and 94a) * Housing, food, and other living allowances paid to members of the military, clergy, and others (Questions 45g and 94g) * Veterans noneducation benefits (Questions 45h and 94h) * Other untaxed income (Questions 45i and 94i) * Money received or paid on the applicant’s behalf (Question 45j) * Number of Household Members * Number in College |

## **Tax Transcript Decoder**

**Navigation**: <https://www.nasfaa.org/tax_transcript_decoder>

* Do NOT include any amount from Other Taxes
* Schedule C can be used as proof of business income from line 12; not all business income will generate a 1099-MISC form

### **Taxes Paid Clarification:**

Use these lines to calculate the actual amount of tax liability.

**2020 Tax Return Tax Transcript**

1040 Line 22 Total Tax Liability TP Figures Per Computer

-Schedule 2, Line 2 -Excess Advance Premium Tax Credit Repayment

=Income Tax Paid =Income Tax Paid

# **ISIRs in ctcLink**

## **Anatomy of an ISIR in ctcLink**

**Navigator > Financial Aid > Federal Application Data > Correct 20xx-20xx ISIR Records**

ISIRs in ctcLink can be confusing at first. Below is a guide to help locate the information needed for file review.

### **All Tabs**

**ISIR Data** (carries over to all tabs)

Transaction number

EFC status

Primary EFC

Prorated EFC

Correction status

### **Student Information Tab**

**Actual Bio/Demo Data (from Records & Enrollment side)**

Name

SSN

Date of Birth

Citizenship

**ISIR Bio/Demo data**

Name

SSN

Date of Birth

Citizenship

Alien Registration Number

**Student Data – Background Info**

State of residence

Residency date

Degree/certificate working toward

Grade level

High school/GED completion

High school information

Bachelor’s degree by July 1 of current year

Interested in Work Study

Drug conviction information

**Student Data – Financial Information**

SSI – WIC – SNAP – TANF – School Lunch

Dislocated worker

Tax filing status

Tax return information

Other income information

Child support paid and received

Veteran’s non-educational benefits

Military allowance (BAS/BAQ)

**Student Data – Dependency Status Information**

Step Three FAFSA questions to determine dependency

Marital status

Dependency status

**Student Data – Independent Student Information**

Number in family

Number in college

### **Parent Information Tab**

**Parent Data – Background Information**

Marital status

Marital status date

State of residence

Residency date

Number in family

Number in college

**Parent Data – Financial Information**

SSI – WIC – SNAP – TANF – School Lunch

Dislocated worker

Tax filing status

Tax return information

Other income information

Child support paid and received

Veteran’s non-educational benefits

Military allowance (BAS/BAQ)

### **Assumptions\School Codes Tab**

**Miscellaneous Information**

Dependency Override information

Adjusted EFC Calculation Requested

Applicant/Parent signature information

**Student Data – Housing\School Code Information**

Housing code

**Assumptions and Reject Overrides**

Assumptions to be reviewed

Reject codes to be reviewed

**FAA Information**

Process dates – CPS and institution

Change flags for Rejected status, C flag, and verification select

Flags for CPS pushed ISIR, Duplicate SSN code, and Special circumstances

**Student IRS Flags**

Data Retrieval flags

**Reject Reasons**

Reasons for rejected transaction

**Comments**

Comment codes and text

**Field Review**

Highlighted fields on ISIR that should be reviewed

### **EFC\DB Matches\Corr Tab**

**EFC Information**

Primary, Secondary, and Prorated EFC

EFC Change flag

Monthly EFC

EFC Formula Type

Intermediate values used for EFC calculation

**Database Matches\Flags**

SSA, Selective Service, DHS, VA, Dept of Defense, & NSLDS match flags

Secondary DHS match flag and verification number

TIV Eligibility

Pell Eligibility

**Corrected\Verified Fields**

Fields corrected against previous transaction/s

Correction source

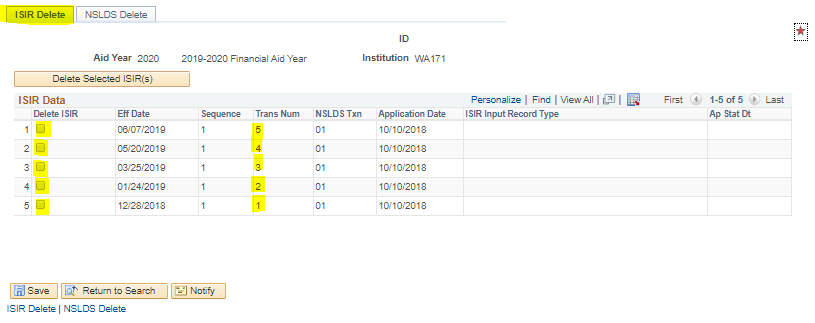
## **ISIR Review**

### **Using Previous ISIRs**

**Navigator > Financial Aid > File Management > ISIR Import > Delete ISIR/NSLDS Records**

If reviewing and awarding on a previous ISIR rather than the most current ISIR

* Delete all ISIRs after the one you are using so that the correct information is loaded into the system
  + This must be done before awarding

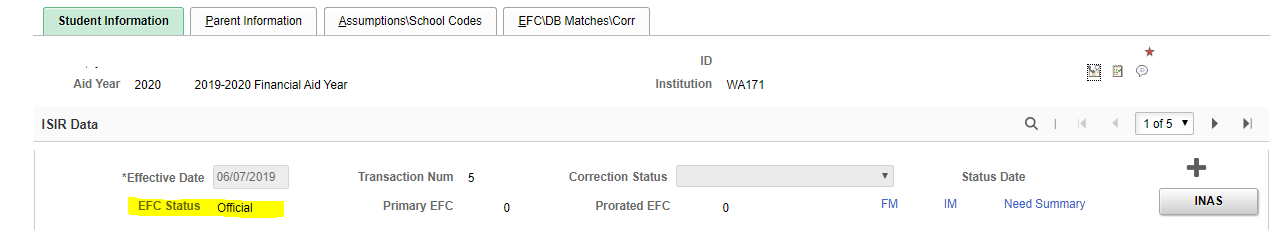


### **Information to Review**

#### **Student Information tab**

**ISIR Data:**

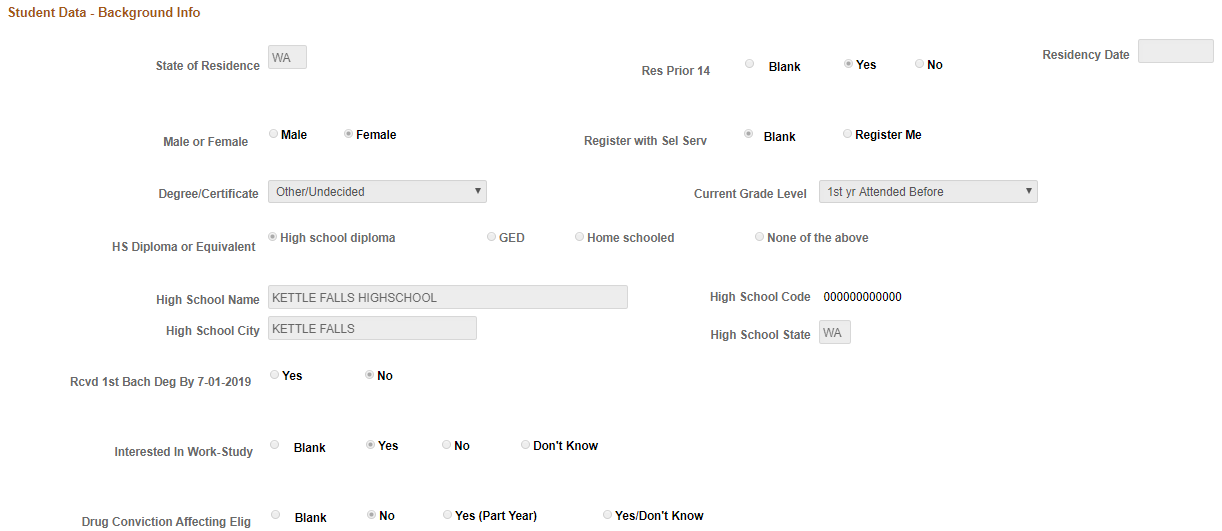
* Make sure there is an official EFC; if it is Unofficial or Rejected, you cannot award on this transaction



**Student Data – Background Info**

* Current grade level should not be greater than **2nd yr Sophomore**
* Must have high school diploma or GED – cannot say “None of the above”
* High school name, code, city, and state should not be blank (this information may be slightly different for foreign high schools)
* **Rcvd 1st Bach Deg by July 1, 20xx**
  + If yes, student is eligible for only student loans and we may require an academic plan depending on the student’s program of study
    - If student is accepted into an AAS program, we generally do not need an academic plan
* **Interested in Work Study**
  + Yes – check the date the student filed the FAFSA (on Assumptions/School Codes tab)
    - If April 1 or before, check “Yes” on the worksheet
      * If we’re out of work study funding, write “out of funds” below it
    - If after April 1, check “No” on the worksheet
  + **Drug Conviction Affecting Elig**
    - No – eligible for funds
    - Yes (Part Year) – have student complete Question 23 worksheet to determine date of eligibility or submit confirmation of completion of acceptable drug rehabilitation program – there should be a SAR Comment Code of 054
    - Yes/Don’t Know - not eligible this academic year – there should be a SAR Comment Code of 056

Comment codes are available on the **Assumptions/School Codes** tab



**Student Data – Financial Information**

* Tax Return Filed
  + Cannot say “Will File” – this must be updated before we can award (student must file taxes or update information on the FAFSA)
* Tax Filing Status
  + Should match student’s marital status except in cases of:
    - Recent separation or divorce
    - Marriage that occurred after filing of taxes but before filing of FAFSA
* Scan income information – you may need to request clarification or additional information if any amounts seem questionable or if amounts are too low to support listed household size
  + Military allowance may indicate student received BAH/BAS, which may require adjustments to the budget

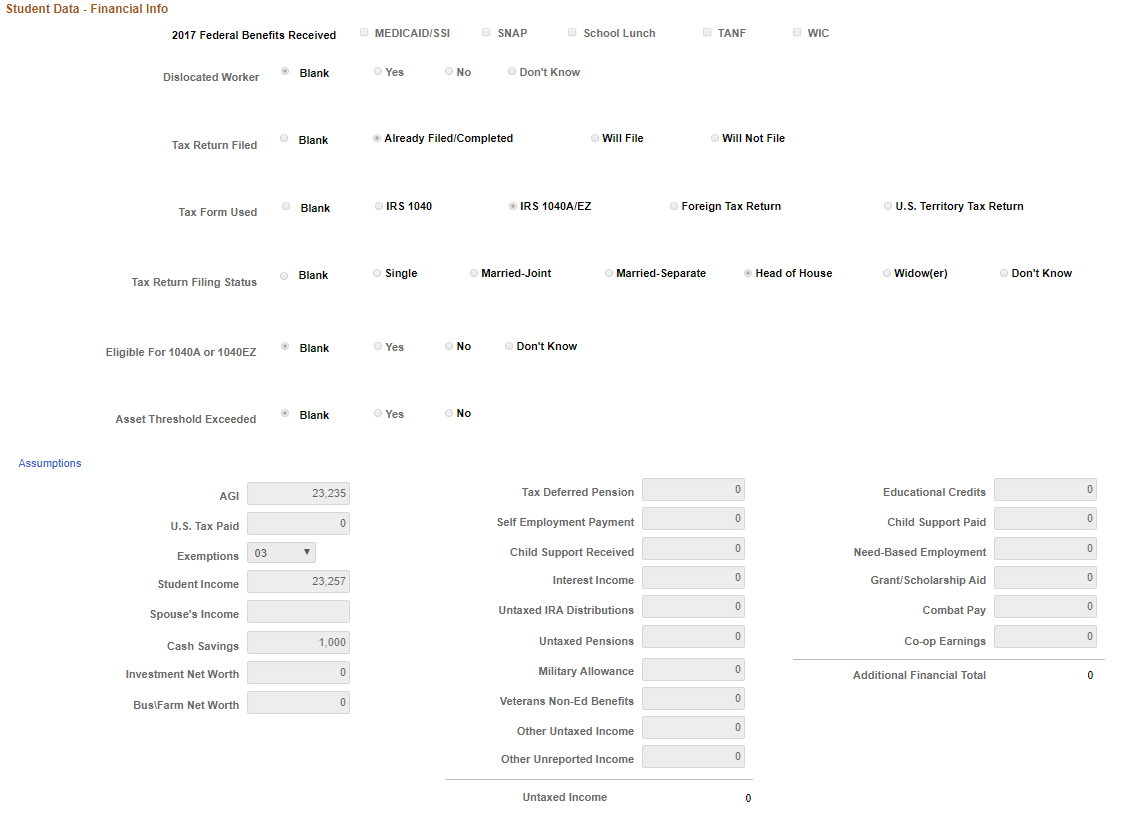
**Per guidance in May 2015:**

* + - * + Independent students who receive BAH (military housing allowance) – reduce COA by Room portion:

See current academic year COA chart

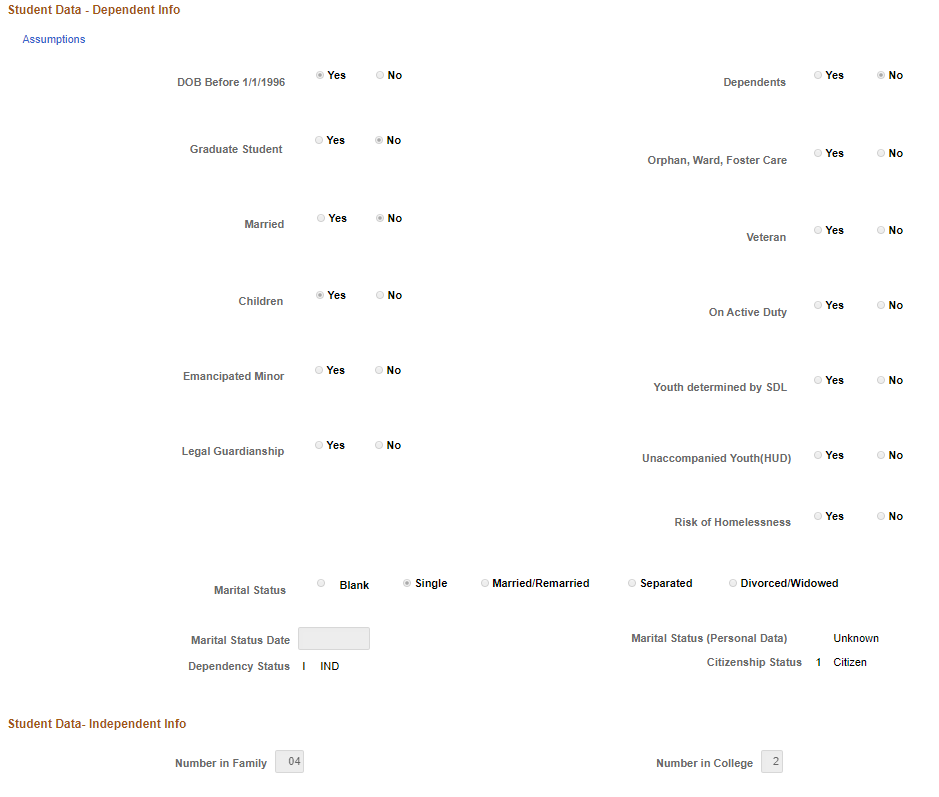
* + - * + Dependent students who are living with parents who receive military housing allowance or who live on a military base

Do not reduce as COA only includes Board costs



**Student Data – Dependency Status Information**

* Things to watch for:
  + Graduate Student
    - If yes, student should also have said Yes to the “Rcvd 1st Bach Deg by 7/1/20xx” question
    - If student answered No to “1st Bach Deg” question, the answer to the “Graduate Student” question is probably No – seek clarification from the student
  + Marital Status – if Married, the student’s Marital Status should be either **Married** or **Separated**
  + Marital Status Date – can be a good indicator on whether the student divorced or remarried after taxes but before filing the FAFSA
  + Dependents (other than children) – if this is the only factor that determines a student is an Independent student, documentation will be required to support the claim
    - Documentation should be a statement from adult dependents, or a statement from the student if dependents are minors
    - The statement should include income amounts for adult dependents
    - If the EFC will not be impacted by excluding dependents other than children, there is no need to take any action
  + Emancipated Minor/Legal Guardianship/Orphan, Ward, Foster Care/Youth Determined by SDL/Unaccompanied Youth (HUD)/Risk of Homelessness – these may require additional documentation such as court documents, letters from the student’s McKinney Vento Homeless liaison at their high school, etc.
  + Number in Family & Number in College – anything over 1/1, make sure student is married or has checked the buttons for children and/or other dependents



#### **Parent Information tab (Dependent students only)**

* Family size
* Number in household
* Marital Status – can’t list Divorced or Separated and include spouse income
* Marital Status Date – can be a good indicator on whether the student divorced or remarried after taxes but before filing the FAFSA
* Tax Filing Status: make sure this matches Marital Status
  + If they don’t match, look at Marital Status Date
* Scan income information for anything that looks unusual

#### **Assumptions/School Codes tab**

This tab shows any professional judgments, schools and housing options, assumptions made by Department of Education in order to process the FAFSA, reject overrides, flags, processing dates, and comments.

* Housing code will determine the budget the student is assigned
* Assumptions may require resolution
* Special Circumstances flags may require additional documentation from the student
* Comments may show items that require resolution or special attention

#### **EFC/DB Matches/Corr tab**

This tab gives general information about the EFC formula, database match flags, and corrections submitted.

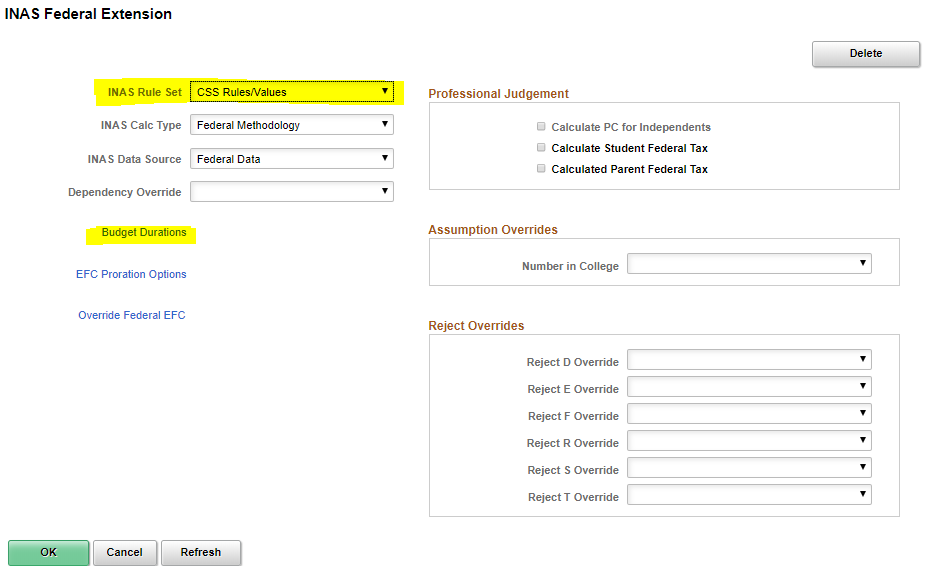
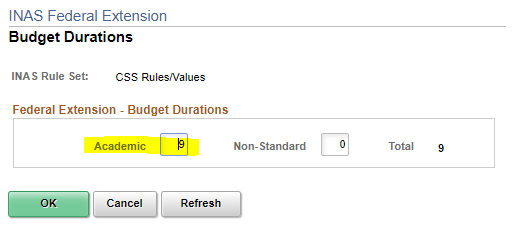
* **SSN Match**: 4 SSN, Name, and DOB Match
* **Title IV Fund Eligibility**: Y
* **Federal PELL Eligibility**: If this is No, follow up to determine why

**Monthly EFC link**: This gives a breakdown of the EFC by month

* Check 11-month amount for EFCs greater than zero – it could differ from the 9-month EFC

**FM link**: This allows you to adjust the monthly EFC according to how many months the student is attending, if less than or more than 9

* **INAS Rule Set**: select CSS Rules – the rest of the necessary fields will automatically populate
* Click Budget Durations
* Enter number of months student will attend
* Click OK
* Click OK again
* Click the INAS button
* The new EFC will show in the ISIR Data section as Prorated EFC
* **You must change the EFC months even if the EFC is zero** if the student is attending less or more than an academic year; otherwise, it impacts the Unit Record and will cause numerous edits that have to be corrected

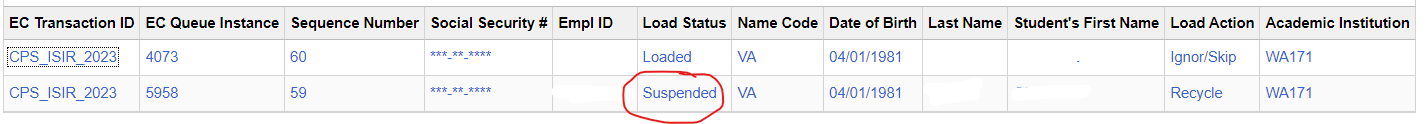


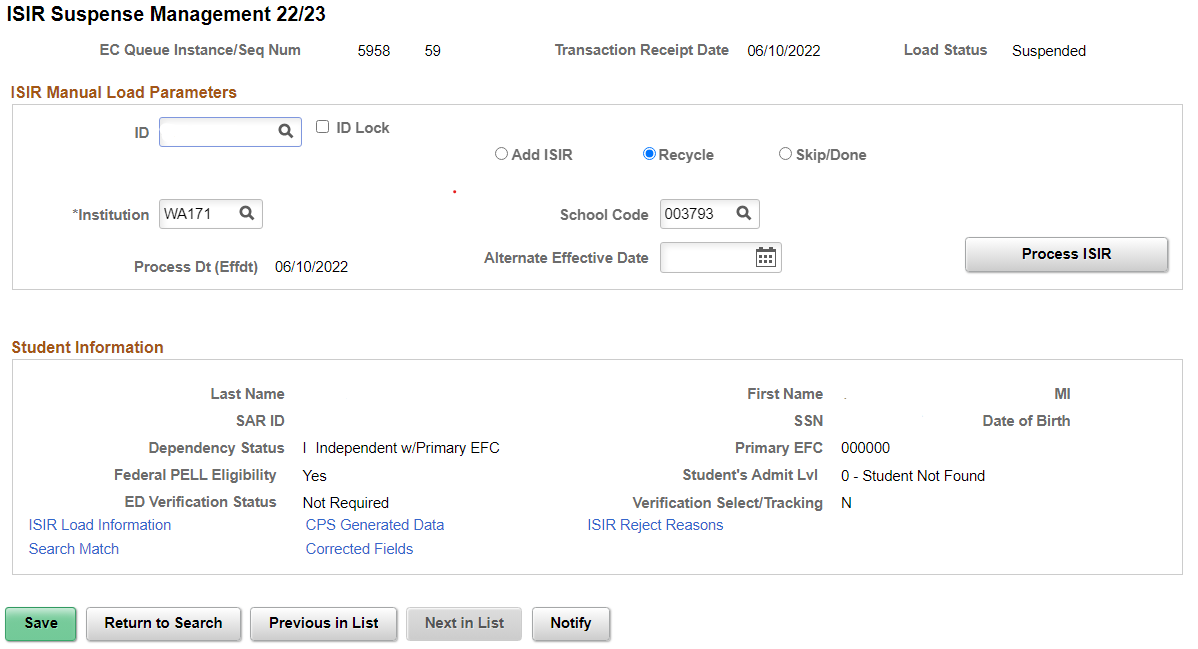
### **New ISIRs After File Has Been Reviewed**

In addition to checking new ISIR transactions for changes that may impact the student’s eligibility, new ISIRs may trigger new flags within ctcLink. Many of these will come in as Suspended. To review changes, use either the **Compare Transactions** in **FAA Access** or the suspended ISIR file: **Navigator > Financial Aid > File Management > ISIR Import > 20xx-20xx Suspense Management**.

Be sure to check the following for every new ISIR:

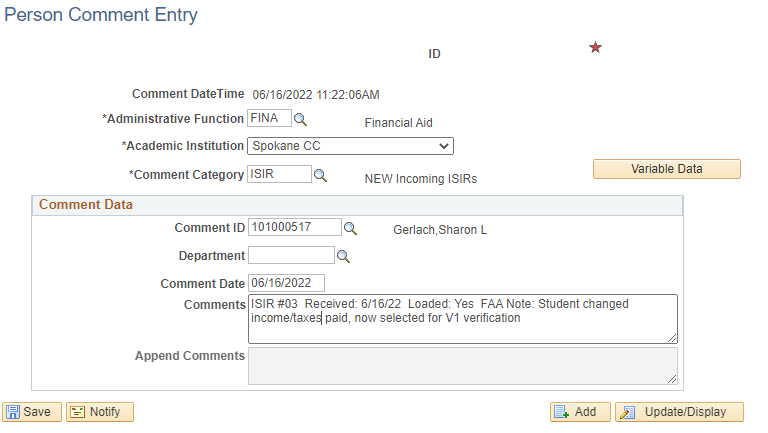
* New checklist items
  + If the issue resolved, flip to Completed on both tabs
* Database matches
  + If a database match has been previously overridden, the new ISIR will overwrite that; redo the database match override (Pell LEU, SULA, Selective Service, etc)
* For students previously selected for verification
  + Verification flags to see if the student’s verification group has changed
  + New checklist items for verification documentation (if verification group changed)
* For students not previously selected for verification
  + Verification flags
  + New checklist items for verification documentation
* Any CPS-pushed ISIR must be loaded
  + In **20xx-20xx Suspense Management** page, click on the suspended ISIR in the list
  + Check the **ID Lock** box
  + Click **Add ISIR**
  + Click the **Process ISIR** button
  + Click **Save**





Add an F01 service indicator to clock disbursements if a new ISIR has been selected for verification, or the verification group has changed for a previously verified application. Otherwise, funds might be disbursed before verification is completed once the verification checklist items are marked completed. **Use F03 service indicator if disbursements have already been run.**

Add a new comment to the View Financial Aid Status page, using the **ISIR** comment category:

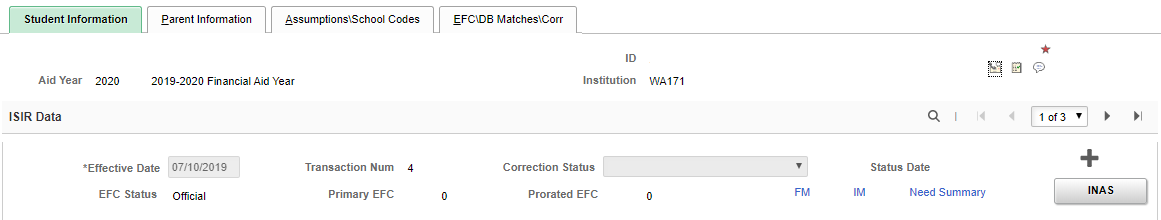


### **Submitting Corrections on Non-Verification Files**

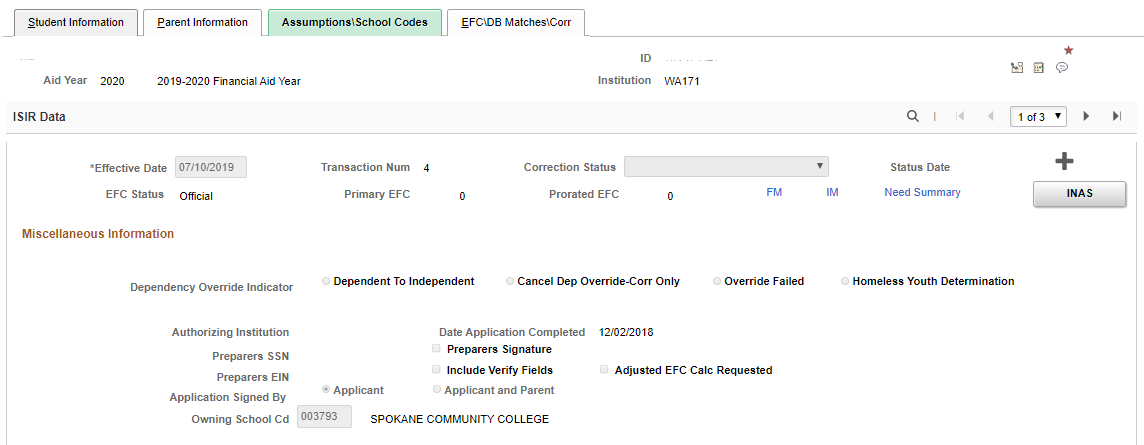
Occasionally, you may need to send a correction on a file that was not selected for verification, such as in the case of a professional judgment.

**Navigator > Financial Aid > federal Application Data > Correct 20xx-20xx ISIR Records**

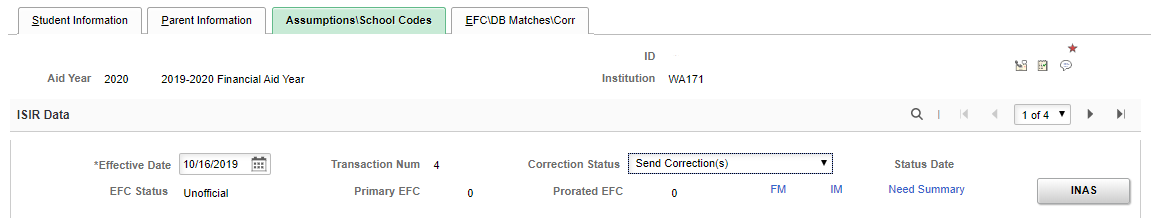
* Click the **+** to add a new row



* Make the necessary changes
* If the change is due to a professional judgment, do one of the following on the Assumptions/School Codes tab according to the student’s circumstances:
  + Dependency Override: click the radio button next to Dependent to Independent
  + Homelessness determination: click the radio button nest to Homeless Youth determination
  + Change of financial circumstances or other allowable situations: check the box next to Adjusted EFC Calc Requested



* Change Correction Status to Send
* Click INAS



### **Changing Marital Status**

A student’s marital status may be updated after the FAFSA is filed **in specific circumstances** to give a more accurate picture of the student’s ability to pay or to address an inequity. Please follow guidance in the FSA Handbook to determine when a student’s status may be updated.

If it is determined that a marital status update is allowed under regulations, it is best to do the update directly in FAA Access, so that ED software can verify the information being entered to avoid a rejected ISIR.

However, if a student’s marital status is updated through ctcLink and the new transaction is rejected, it is easily fixed. Simply redo the correction directly in FAA Access; ED software will confirm the changes being made before submission, and the new transaction will not reject.

# **Academic Plans**

Academic plans are generally needed only for DTA/MRP programs, although one may be requested for a professional/technical program if the student has a lot of substitutions or is taking coursework not required for their listed program of study.

## **Previously Approved Academic Plans**

### **Tracking an Academic Plan from a Prior Year**

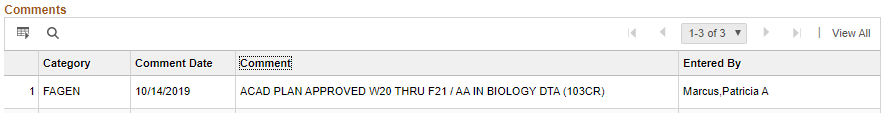
**Navigator > Financial Aid > View Financial Aid Status (Comment section)**

**Navigator > Campus Community > Comments > Comments – Person > Person Comment Detail**

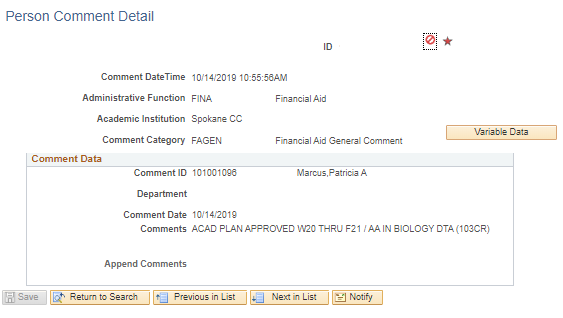
The specific conditions of a Financial Aid academic plan should be noted as a Comment in the academic year in which the plan was approved. Comments appear on the **View Financial Aid Status** page or can be viewed in **Person Comment Detail**.

It is helpful to staff working before-quarter reports for a previous academic plan to be noted in the current year’s comments, for example: “Previous academic plan approved thru F21 for Biology DTA”.

***View Financial Aid Status Page***



***Person Comment Detail***



## **New Academic Plans**

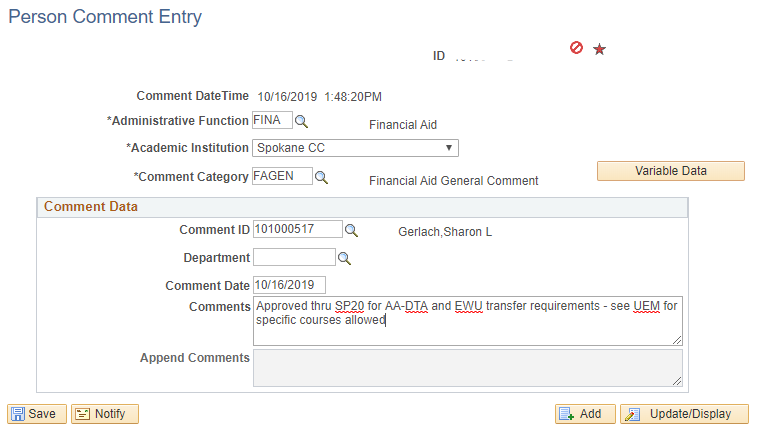
### **Tracking a New Academic Plan**

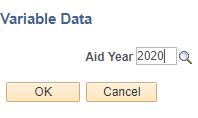
**Navigator > Financial Aid > View Financial Aid Status**

Click the Comment icon at the upper right hand side of the screen



A new page will open for entering the comment. Be sure you select the correct academic year in Variable Data to it shows up in the right View Financial Aid session





\*Add a User Edit Message **only if the plan is very restrictive** (a few specific classes only)

# **User Edit Messages (UEM)**

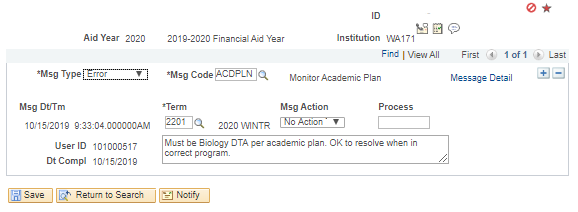
**Navigator > Financial Aid > View Financial Aid Status (Edit Messages section)**

**Navigator > Financial Aid > Disbursements > Maintain User Edit Messages**

User Edit Messages (UEM)\* block financial aid from being disbursed until restrictions on the student’s eligibility have been checked. This replaces the old HR/IR track codes and report from the legacy system.

They are academic-year specific but are carried over from term to term by changing the **Term** after the student’s restrictions are checked and schedule or program is confirmed as acceptable.

**\*User Edit Messages should only be placed for unusual or restrictive circumstances**



## **Reasons for User Edit Messages:**

* Academic plan is limited to a very few, specific courses or a particular program
* Student consistently doesn’t follow program outline or academic plan
* Student is waitlisted for a program and is ineligible until admitted
* Student is on FA contract and pace/GPA must be checked before disbursing
* Student has exhausted allowed petitions and is attending at own expense
* Repayment arrangements were made with Department of Education (requires FSA repayment arrangement letter)

## **Maintenance of UEMs**

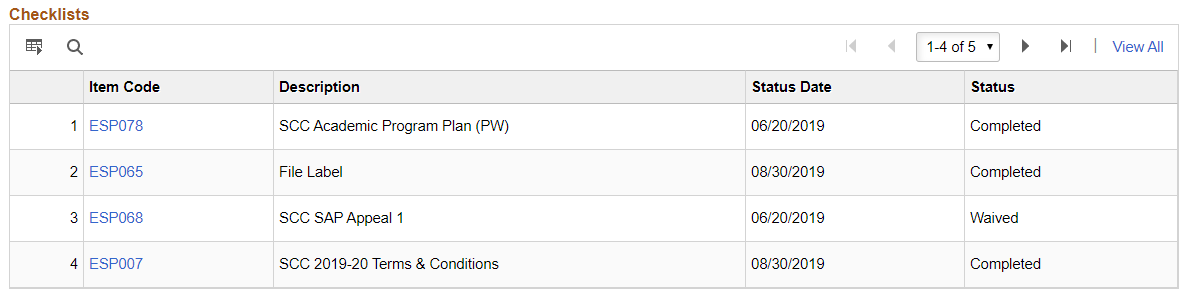
* Update the remaining courses required when moving a “limited classes” UEM forward – such as add a “Completed” section at the bottom of the UEM comment and move completed coursework there so that remaining coursework is clear
* If the student must be coded in certain program by a specific quarter, enter that quarter in the \*Term field; don’t enter current term and keep moving it forward until accepted
  + If waitlisted for a program or has finished prerequisites or didn’t get admitted this round, enter the next entry quarter for the program (some are Fall only starts, etc)
* If the student gets admitted or otherwise resolves the reason for the UEM, please mark the UEM as resolved; don’t keep moving it forward
* **DO NOT** USE UEMs FOR LISTING ACADEMIC PLAN REQUIREMENTS unless you are strictly limiting classes or the student has a history of not following academic plans or program outlines
  + These are not for tracking academic plans for several quarters; they are for making sure the student completes their last few credits
  + Track general academic plans on the View Financial Aid Status page in a comment

# **Checklist Items**

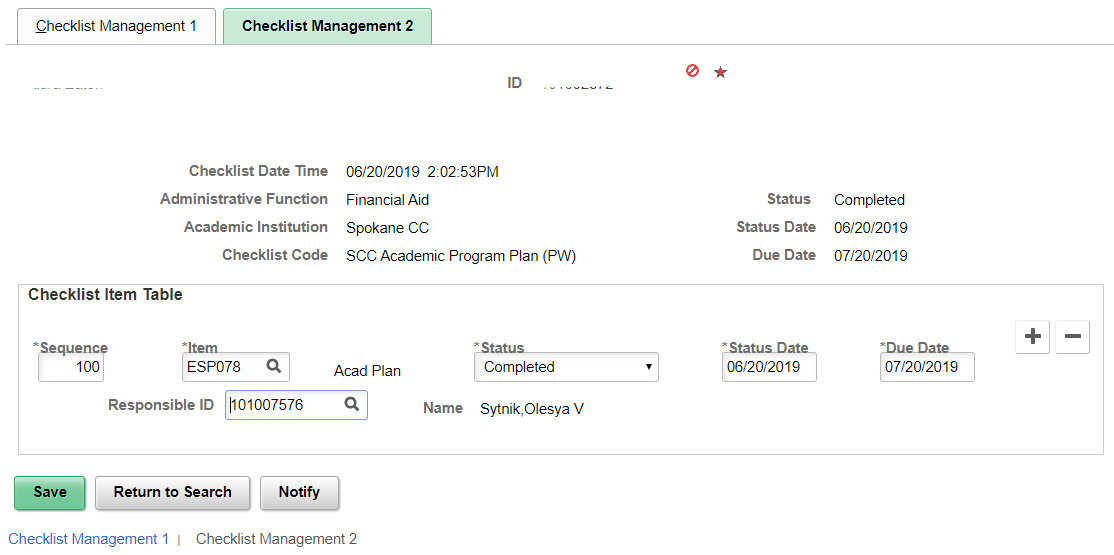
**Navigator > Financial Aid > View Financial Aid Status,**

**Navigator > Campus Community > Checklists > Person Checklists > Checklist Management-Person**

* Check for any incomplete checklist items
  + The easiest way to do this is in View Financial Aid Status in the Checklists section



* Mark completed if appropriate and change the Responsible ID number to your ID number



## **Rollover Checklist Items**

Rollover checklist items from the previous academic year(s) are designated with Tammy Zibell’s EMPLID number for clarification, beginning 2020-2021 academic year.

## **Waiving vs Completing vs Cancelling Checklist Items**

* Waived = automated system action; won’t have supporting documentation in most cases
  + In some circumstances, staff might waive a required document due to ED guidance (such as verification requirements being waived in the 21-22 academic year)
* Completed = staff action; will usually have supporting documentation
* Cancelled = staff action; might have documentation depending on the checklist item
  + Don’t complete if we don’t have documentation; cancel instead (such as with BA=yes on FAFSA but student gives us a statement that they do not have a BA degree, do not mark Completed, as staff may in later academic years look for confirmation that the student has earned a BA degree)

# **File Processing Comments**

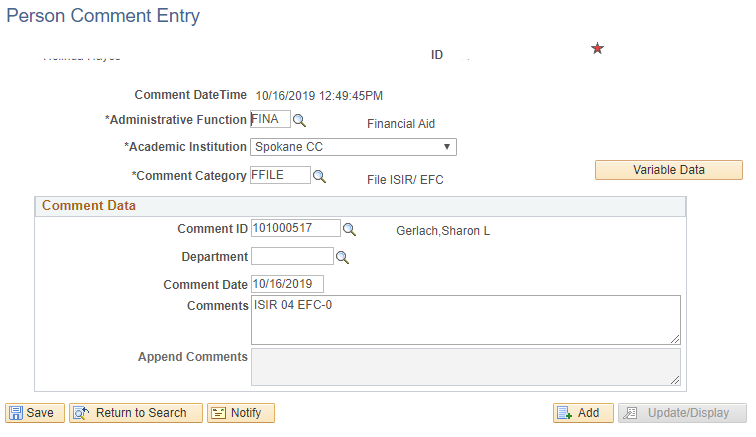
**Navigator > Financial Aid > View Financial Aid Status**

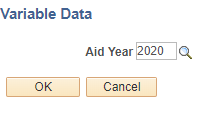
Comments are the history of the file review and packaging process and serve as documentation for delays in packaging, requests for additional documents, and other important issues. They should never be deleted (unless added to the student’s record in error), but they can be amended when the situation has been resolved.

## **To Add a Comment**

Click the comment icon at the top right of the page to add comments for:

* ISIR transaction and EFC used to package
* Academic Plans
* TEMP and reason why the file can’t be completed
* Professional judgments
* Any other unusual situation that should be documented
* Follow the established protocol for comments as listed in the [Comment Categories](#categories) section





## **To Edit a Comment**

**Navigator > Campus Community > Comments > Comments – Person > Person Comment Summary**

* Enter the student’s ID number and click Search
* Click the Search button to bring up all existing comments
* Click the Edit link beside the comment to be edited
* Make the desired changes
* Click Save

## **Comment Categories**

|  |  |  |
| --- | --- | --- |
| **ADMINISTRATIVE**  **FUNCTION** | **COMMENT**  **CATEGORY** | **USE:** |
| **FINA** | **FAGEN** | **Used for general, non-award or non-packaging related comments and TEMP comments**  EXAMPLES: “Gave D.O. at front desk” or “Not attending 18-19 per phone” or “TEMP – need student’s nonfiling verification letter from IRS” |
|  | **TEMP** | **Used to document why the student’s file cannot be completed** |
|  | **FFILE** | **Used to track ISIR and EFC only**  ISIR transaction can be inserted after the word ISIR and EFC after EFC (ex: ISIR 02/EFC-2154) or just enter both numbers after the leading text (ex: ISIR/EFC: 02/2154 |
|  | **FCANCL** | **Used for tracking cancelled checks, reversed refunds, and unclaimed property**  Please use the following protocol when tracking:  Reversed refund: Term, $amount, reversal reason  Unclaimed property: Term, $amount, what it was applied to  Manual check: Term, $ amount, reason for cancellation |
|  | **FAWDS** | **Used for information that specifically impacts awarding or packaging**  EXAMPLES: PLEU, loan aggregates, SULA; any other unusual thing related to the student’s awards |
|  | **FLOANS** | **For Ronda’s use only – used for tracking reductions or eligibility comments** |
|  |  |  |
| **FINT** | **FRECAL** | **Used for tracking recalculation of aid due to dropped classes during census**  Please use the following protocol when tracking:   |  |  | | --- | --- | | R/C F18 - 10CR to 5CR - Reduced Aid |  | |
|  | **FREDUC** | **Used for when student is paid at a lower enrollment level**  EXAMPLE: “Paid F18 @ 10CR; PSYC 200 not required for program” |
|  | **FREPAY** | **Not in use at this time; reserved for future use** |

# **Budget Adjustments**

## **If increasing for actual tuition costs**

**Navigator > Financial Aid > Budgets > Maintain Term Budgets**

If student’s actual tuition costs exceed the built-in tuition amount in the cost of attendance, it is acceptable to increase the COA tuition element by the difference.

* If adding for one term:
  + Click the **+** in the Budget Group section
  + In the TUIT line, enter the actual tuition costs
  + Click Save
  + Click Update Need Summary button

## **If adding program costs (such as tool allowance) to a student’s budget**

* If adding for all terms attended:
  + Divide the amount being added to the budget by the number of terms attending
  + For each term being adjusted, click the + beside the last item in the list
  + In the blank line added, enter:
    - **Category**: PLAN
    - **Item code**: PLAN
    - **Amount**: the amount being added for that term
    - **DO NOT add the program costs to an existing line**; add a new line and use PLAN
    - Click Update Need Summary button
* If adding for one term:
  + Click the + beside the last item in the list
  + In the blank line added, enter:
    - **Category**: PLAN
    - **Item code**: PLAN
    - **Amount**: the full amount you’re adding
    - Click Update Need Summary button

## **If cost of attendance is missing a quarter**

**Navigator > Financial Aid > Budgets > Create Student Budget**

* If the student just registered that day, wait until the next day to award; the term and budget will rebuild automatically overnight
* Otherwise, enter term in Term field and click Build Budget for each term that should be included in the budget
* When all have been built, click **Move Budget**

## **If funding fewer credits than the student is enrolled**

**Navigator > Financial Aid > Awards > Award Processing > Assign Awards to a Student**

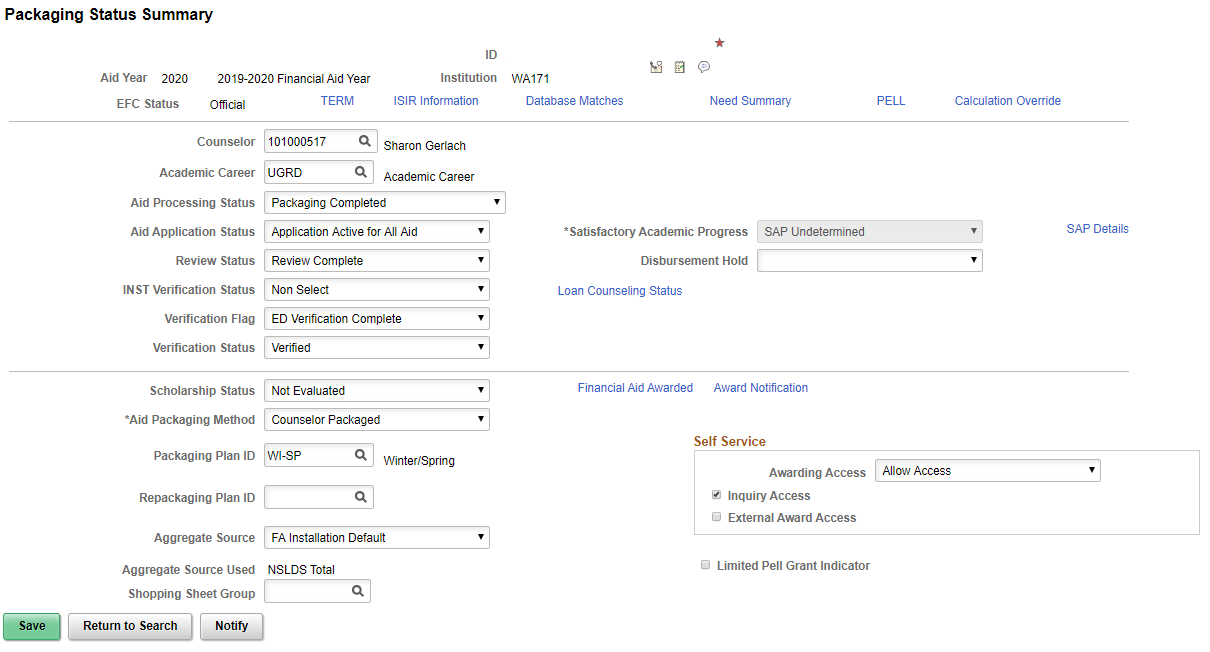
* Adjust math on the worksheet; COA in the worksheet calculations will need to be adjusted for the enrollment level being funded
* Adjust the award down to the correct amount for the credits we are funding
* Loans may need adjusted downward due to budget decrease
* Validate
* **CHECK DISBURSEMENTS** **AFTER VALIDATING** TO MAKE SURE NOTHING MOVED!!!
* Post
* **CHECK DISBURSEMENTS AFTER POSTING TO MAKE SURE NOTHING MOVED!!!**
* Add a comment to the View Financial Aid Status page (see [To Add a Comment](#addcomment) for steps)
* **DO NOT CHANGE ANYTHING ON THE FA TERM PAGE!!**
* Do not adjust the budget; it will only revert to the original amounts overnight

# **Prepare Student Record for Packaging**

**Navigator > Financial Aid > View Packaging Status Summary**

## **Non-Verification Files**

* **Counselor:** enter your ID number
* **Academic Career:** UGRD (should already be populated)
* **Aid Processing Status:** Ready for Packaging
* **Aid Application Status:** Active (should already be populated)
* **Review Status:** Complete
* **Click Save**



## **Verification Files**

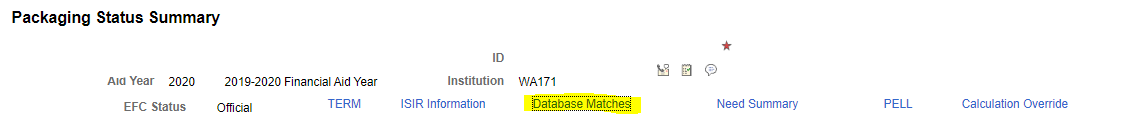
In addition to the above fields, also complete the following fields:

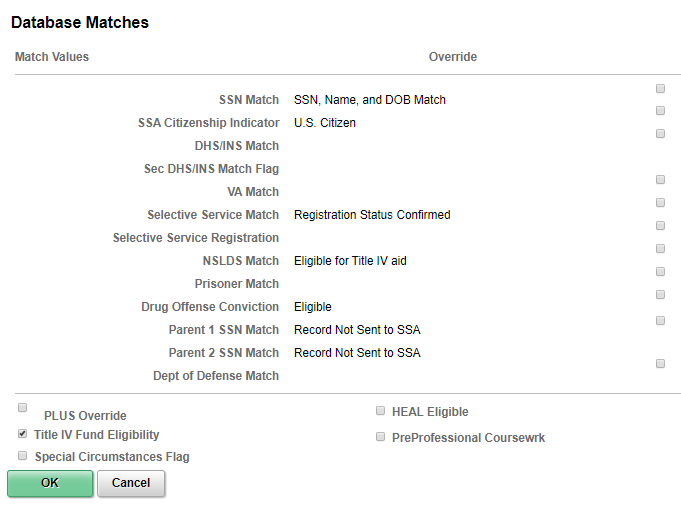
* **Verification Flag:** ED Verification Complete
* **Verification Status:** Verified
* **Click Save**

## **Database Match Override**

Some messages may require database match overrides. Be sure appropriate documentation supporting the override has been submitted before initiating an override.

**Navigator > Financial Aid > View Packaging Status Summary**

* Click the Database Matches link at the top of the page
* Check the box beside the database match you want to override
* Click OK
* Click Save on the View Packaging Status Summary
* Go back to Awards and try awarding again



# **Package Awards**

**Navigator > Financial Aid > Awards > Award Processing > Assign Awards to a Student**

**IMPORTANT NOTE 1**: If reviewing before Summer term registration begins ( the student will not be enrolled in Summer Quarter courses), package for FWSP. Assign the checklist item ESP135 so the student is notified that Summer enrollment is required before we can add Summer aid.

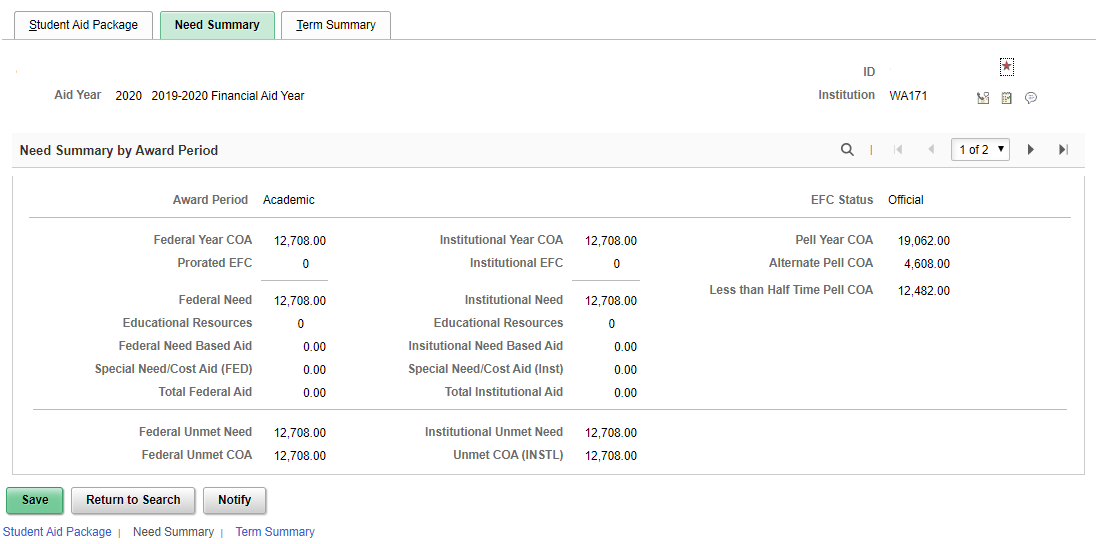
Use **disbursement plan 09** (SUFWSP) when awarding to open all quarters’ “buckets.”

**IMPORTANT NOTE 2**: Do not package the funding the same day that a new ISIR loaded into the system. If packaging on a newly loaded correction to an ISIR, **wait until the day after it is loaded** so that the Washington College Grant and College Bound Scholarship pages can update with the student’s most current eligibility. Check the Washington College Grant and College Bound Scholarship eligibility pages before awarding to make sure the information has updated since the new ISIR was loaded.

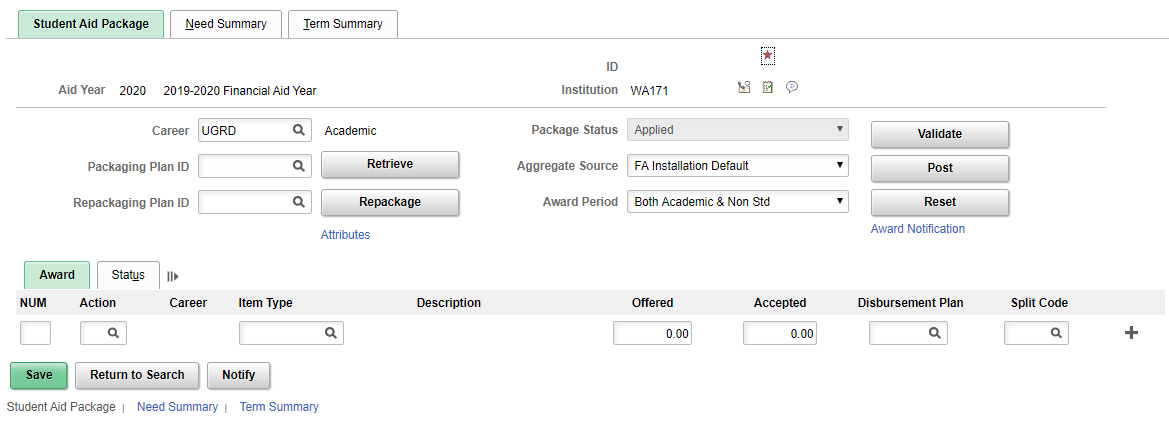
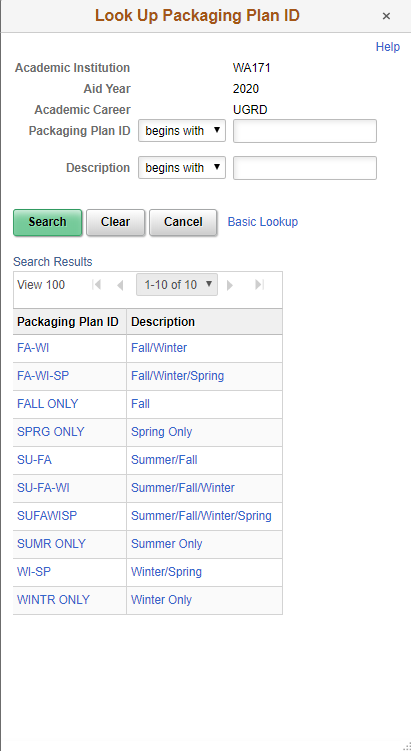
**Navigator > Financial Aid > CTC Custom > CTC Interfaces**

Make sure the budget is correct

* Click the Need Summary link at bottom (or the tab at the top)
* Fed Year COA should reflect any documented increases or reductions
  + If budget is incorrect, see next section [Budget Adjustments](#budgetadj) – **MAKE BUDGET ADJUSTMENTS BEFORE AWARDING AND RELOAD ASSIGN AWARDS PAGE**



* + Adjust COA on the worksheet if the student is being paid for fewer credits than s/he is enrolled in, but don’t make any changes in the budget in ctcLink; the system will not retain it
* Click the Student Aid Package link at bottom (or the tab at the top)
* Click the magnifying glass beside Packaging Plan ID field
* Choose the quarter or combination of quarters the student is attending in the pop-up box



* Click Retrieve
* Make sure all awards look correct and package doesn’t exceed student’s need or cost of attendance
* Look at the messages beside any item type the student is eligible to receive before validating
* If you have to make adjustments or overrides elsewhere
  + Click Reset
  + Do the overrides (see [**Database Overrides**](#dboverride) section)
* Validate
* Post

**Occasionally an error message will appear when awarding. The** [**Award Error Messages**](#awarderrors) **chart shows how to resolve these errors.**

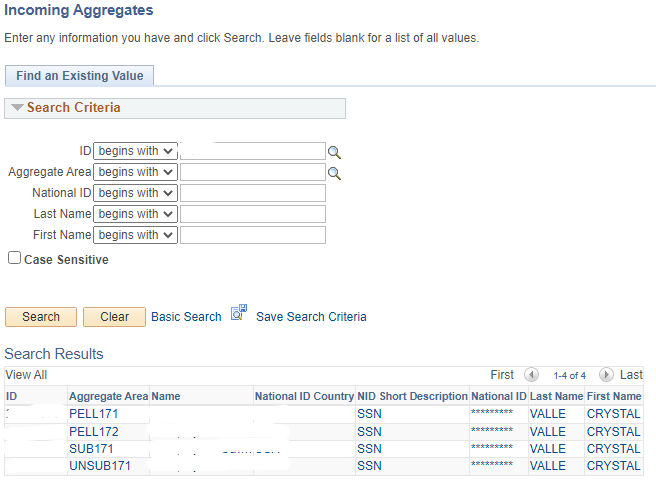
## **Update Incoming Aggregates**

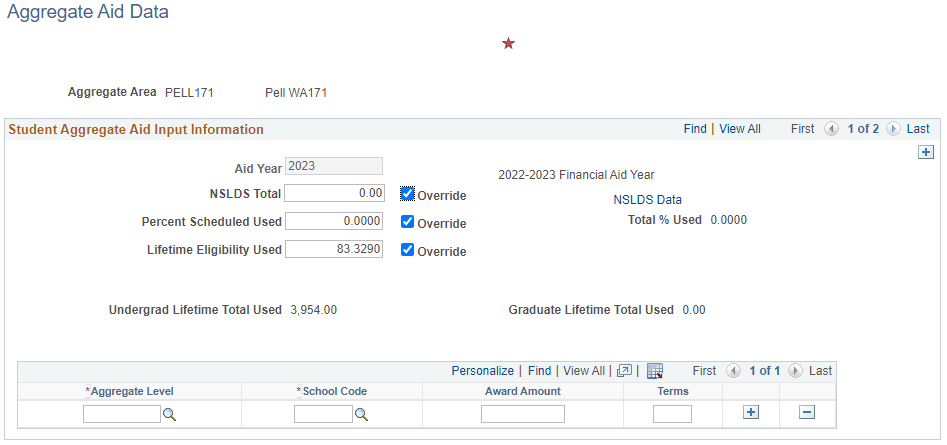
**Navigator > Financial Aid > Awards > Aggregates > Update Incoming Aggregates**

Student records often come in well before the Spring term, and the aggregates won’t include the Spring disbursements.

If NSLDS indicates the student has limited funding for loans or Pell Grant, it’s essential to update the incoming aggregate amounts to reflect the NSLDS amounts that include Spring awards BEFORE awarding. Be certain that you are updating the aggregates for SCC only (do not under any circumstances update SFCC’s aggregates).

* Enter student’s ID and call up record
* Click on the award that needs to be updated (such as PELL171)
* Check the Override box beside **NSLDS Total** (rarely updated), **Percent Scheduled Used,** or the **Lifetime Eligibility Used** field (whichever needs to be corrected) – they greyed-out field should now become active
* Enter the new amount per NSLDS records
* Click Save





## **Invoke Professional Judgment**

This function is used when awarding students who are in non-standard or clock-hour programs that require different Pell Grant calculations (such as the Manicurist and Esthetician clock-hour certificates). Occasionally, posting errors can’t be resolved with any of the resolutions in the Award Error Messages chart, and the last-resort option is to use Invoke Professional Judgment.

Awarding and revising awards are done the same as in the Assign Awards to a Student page. Make the required revisions to the amounts, and validate and post.

Using the Invoke Professional Judgment page will prevent the awards from being changed to the standard amounts when other changes are made to the student’s aid package.

## **Institutional Funding**

These funds are eligible to be disbursed in Summer Quarter. Be sure to include them when revising awards to include Summer Quarter.

### **FSEOG**

There is no longer a minimum 6 credit requirement to receive FSEOG. Funds can be disbursed as long as the student is enrolled in 1 or more credits. The grant will be prorated for enrollment levels as follows:

1-5 credits $350

6 or more credits $700

The proration will be applied at the time awards are adjusting for the Less-than-Full-Time Authorization report.

### **SCC Grant and Need-Based Tuition Waiver**

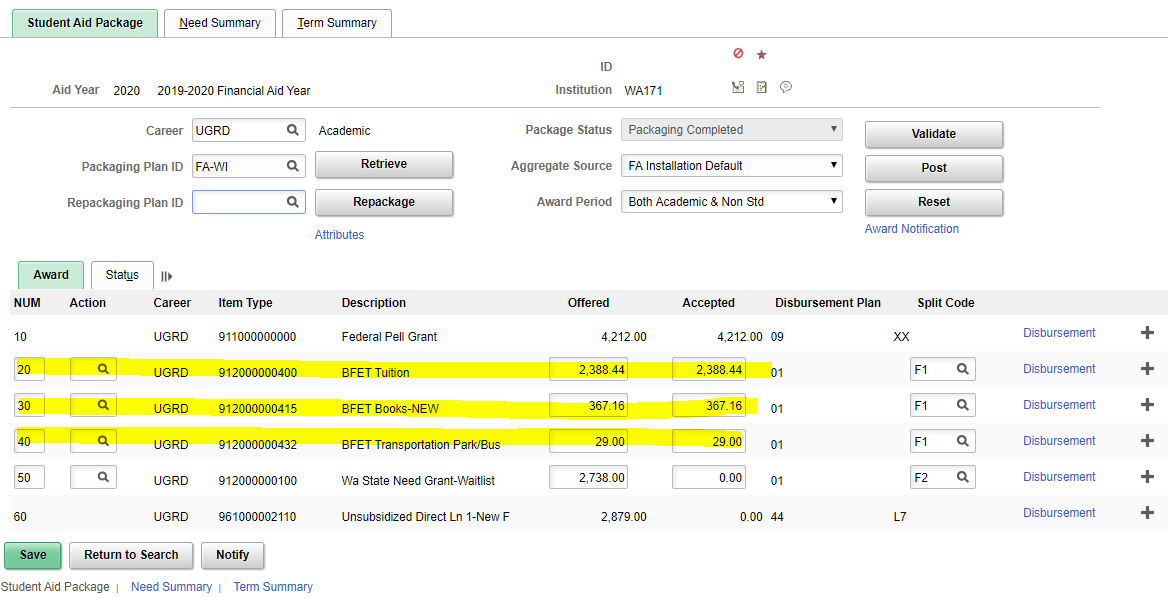
At this time (2/28/2022), the minimum 6 credit requirement remains in place for SCC Grant and Need-Based Tuition Grant until otherwise instructed by WSAC.

## **Order of Awards**

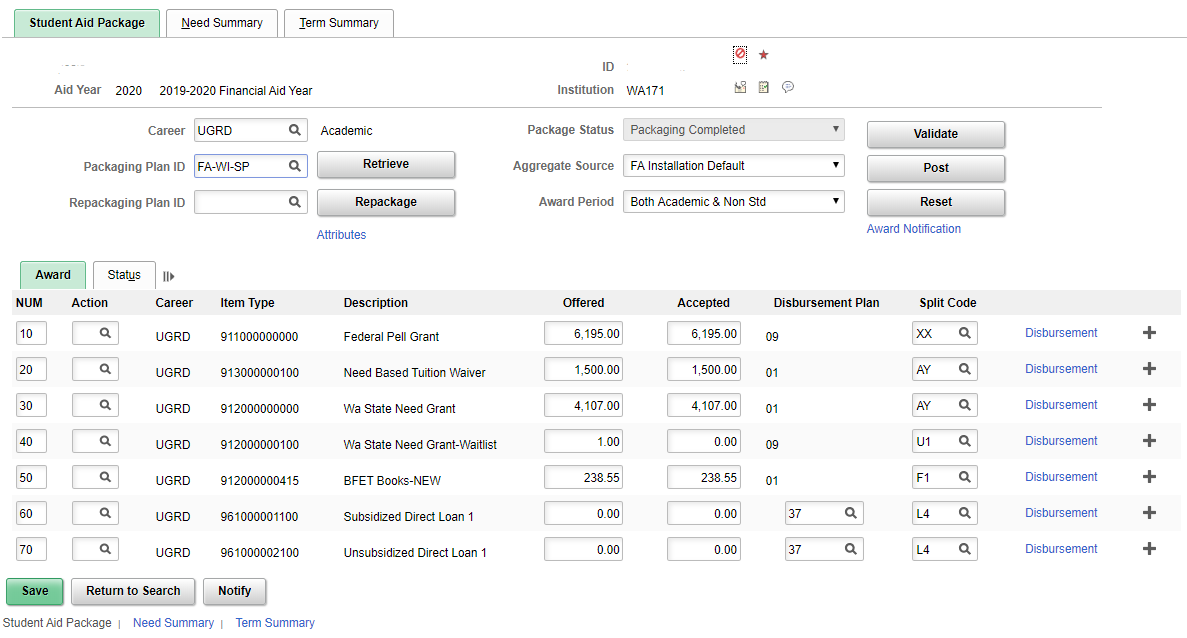
The order of the awards is important. Some aid is entitlement or is otherwise required to be given before outside sources. Please refer to this list when packaging. You can change the order the awards appear by reordering the numbers in the far left column:

* Pell
* Institutional funds
* Washington College Grant
* College Bound
* Passport
* Student Success funds (BFET, Worker Retraining, Opportunity Grant, etc)
* Scholarships
* Work Study
* Athletic Work Study
* Agency
* Subsidized loans (less than $200, roll into Unsub)
* Unsubsidized loans
* No Need Tuition Waiver (ABE)

***Example of Incorrect Ordering:***



***Example of Correct Ordering:***



## **Award Order Flowchart**

|  |  |
| --- | --- |
| **Standard Awards** | **Additional Funding** |
|  |  |
| Pell Grant |  |
|  |  |
| Washington College Grant |  |
|  |  |
| College Bound  Scholarship |  |
|  |  |
| Passport |  |
|  |  |
| Institutional funds  (TWND/SEOG/SCC Grant) |  |
|  |  |
|  | Student Success Funds  (BFET, Worker Retraining, etc) |
|  |  |
|  | Scholarships |
|  |  |
| Work Study |  |
|  |  |
|  | Athletic Work Study |
|  |  |
|  | Agency |
|  |  |
| Subsidized Loan |  |
|  |  |
| Unsubsidized Loan |  |
|  |  |
|  | No Need Tuition Waiver (ABE) |
|  |  |
|  |  |
|  |  |

## **Awarding When Student Attended Summer Transitional Studies Coursework**

Sometimes student will attend Transitional Studies coursework during the Summer and then enter college credit programs in the Fall. Without a quick tweak, ctcLink will have difficulty trying to award funds for Fall-Winter-Spring.

### **Update Summer Financial Aid Term**

**Navigator > Financial Aid > Financial Aid Term > Maintain Student FA Term**

* Scroll through the rows to the Summer term
* On the **FA Term** tab, click the 🞣 in the **Term Information** section
* Click on the Financial Aid tab
  + In the **Student Data** section:
    - Click in the **NSLDS Loan Year** field and change to **1st Year – Never Attended**
    - Click in the **Direct Lending Year** field and change to **First year, never attended**
* Save
* Return to **Assign Awards to a Student** and retry packaging

## **Summer Term Awarding**

Unlike all other terms, Summer term cannot be awarded unless the student has enrolled in classes for the Summer term. The Financial Aid Term and Summer budget will build overnight after the student enrolls.

State funds (Washington College Grant and College Bound Scholarship) will award automatically at full-time amounts, just like Pell.

Some institutional funds (Need-based Tuition Waiver and SCC Grant) aren’t funded in Summer term. FSEOG will award as long as the student is enrolled in at least 1 credit.

### **Before Awarding Summer Term**

#### **Check these before funding Summer term:**

* When the student enrolled
  + Funding must wait until the day after the student enrolls
* How many credits did the student enroll in?
  + If LTHT, some funds will not automatically award (loans and SCC Grant/NBTW)
  + Is the student concurrently enrolled at SFCC? Funded at SFCC?
* Has the student already been awarded for future terms?
  + If yes, see section *Revising Existing Package to Include Summer Term*
* Is there a program change between Summer and Fall terms? Will it impact funding (such as completing a program in Summer and beginning prerequisite requirements for a new program in Fall)?
  + Be sure to check the Student Program/Plan page for any future-dated program changes

**Navigator > Records and Enrollment > Career and Program Information > Student Program/Plan**

* Are the Summer courses required for the student’s listed program of study?

#### **Do these before funding Summer term:**

* Change the EFC months in the ISIR to include Summer term
  + See [FM Link](#FMlink) in ***ISIR Review > Information to Review > EFC/DB Matches/Corr tab*** section for instructions
* If concurrently enrolled at both SCC and SFCC, ask the concurrent enrollment FA staff to make the necessary adjustments to the FA term and the summer budget so that you can award the appropriate amounts

### **Processing Financial Aid Package for Students Not Previously Funded**

There are no differences in processing financial aid packages for Summer-enrolled students who have not been previously funded as opposed to funding students who are not attending Summer. Follow the process outlined in the [*Package Awards*](#PkgAwards) section above.

### **Revising Financial Aid Package for Previously Funded Students**

It is not unusual for a student to decide to enroll in Summer term classes after being funded for future terms. Take care when revising a student’s package; the system may try to cancel funds that are fully expended. There are some work-arounds that can be employed in such cases, which are outlined in the section [*Tips for “jiggling” when the system rejects Summer award changes*](#jiggling).

#### **Steps for revising existing package to include summer term**

**All aid, including loans that have not been sent to COD yet**

* In the **Assign Awards to Students** page, click the **Status** tab above the award grid
* In the **Lock** column, check the box for any item type that should remain unchanged (such as work study funds, loans for students in less than 6 credits for the Summer term, and FSEOG, which should not be automatically updated using this process as it is subject to limited funding levels and the entire award could zero out)
* Click the **Award** tab so the awards are visible
* Click the look-up icon in the **Packaging Plan ID** field
* Select the appropriate packaging plan
* Click **Retrieve**
* Check awards to make sure everything looks correct
  + There will be new rows for the updated Pell, Washington College Grant, College Bound Scholarship, and loans – all but the loan rows will disappear when the package is validated and posted
  + Additional Federal Pell Grant should now be awarded for Pell-eligible students – this awards automatically for Spring only
  + In the **\*NUM** field, order the awards as they should appear (even the blank rows, for consistency):
    - Federal Pell Grant
    - Additional Federal Pell Grant
    - FSEOG
    - Other institutional aid (SCC Grant, Need Based Tuition Waiver)
    - Washington College Grant
    - College Bound Scholarship
    - Scholarships and other special funding such as Worker Retraining and BFET
    - Work Study funds
    - Agency funding
    - Subsidized loans
    - Unsubsidized loans
* **Validate** and **Post**

**FSEOG must be manually revised:**

* Enter a C in the **Action** field
* Validate and Post
* Enter a B in the **Action** field
* Enter the new amount of the award
* Click the **Disbursement Plan** search icon and select 09 (Summer-Fall-Winter-Spring)
* Click the Split code search icon and select U4 (Summer-Fall-Winter-Spring)
* Validate and Post
* Check award to make sure it divides into four equal disbursements in whole numbers

**Direct Loan Student Loans when the record has been sent to COD**

* If the student is not enrolled in more than 5 credits (check for concurrent enrollment), don’t cancel the loans that are set up for future terms; the student is not eligible for loans for Summer
  + Lock the loan rows in the **Status** tab above the award grid so that they aren’t redistributed or zeroed out
* If the student is enrolled in more than 5 credits **and the record has been sent to COD**, use the following procedure:
  + Enter a C in the **Action** field for each loan
  + Validate and Post
  + Wait for the amounts in COD to clear to $0.00 before entering the new loan; otherwise, it will reject
    - The same Item Types cannot be re-used in this instance; use the next Item Type in the series
  + Validate and Post

#### **Tips for “jiggling” when the system rejects Summer award changes**

Sometimes the system has to be “tricked” into saving revisions. This is due to all of the built-in checks and balances. Be sure regulations allow these changes before employing these work-arounds.

When ctcLink won’t perform the revisions the way you’ve entered them, here are a couple of tips to try:

* Exit the student record (use either Return to Search or just reload the page)
  + Change to another page entirely
  + Go back in to the **Assign Awards to Students** page
  + Make revisions (be sure to choose the correct Disbursement Plan and Split Code)
  + Validate and Post
* If the above doesn’t work:
  + Cancel the award(s) that needs to be revised
  + Validate and Post
  + Exit the student record
  + Change to another page entirely
  + Go back to the **Assign Awards to Students** page
  + Make revisions(choose the correct Disbursement Plan and Split Code)
  + Validate and Post
* If neither of the above work:
  + Cancel all aid
  + Validate and Post
  + Clear browser cache
  + Close browser window
  + Restart browser
  + Log back in to ctcLink
  + In the **Assign Awards to Students** page:
    - Choose the appropriate Packaging Plan ID
    - Click the Retrieve button
    - Check awards and adjust any numbers to order the awards correctly
    - Validate and Post
* If you still encounter a posting error, try making the revisions manually, one award at a time, making sure you’re choosing the correct Disbursement Plan and Split Code, posting and validating between each
  + This method will help identify the award that is causing the posting error so troubleshooting can be targeted to it specifically
* Sometimes nothing works, and you must enter the funds in using **Invoke Professional Judgment**. This should be the last resort.

## **Packaging Student Loans**

While student loans generally package automatically with the rest of federal and state aid, sometimes a loan must be entered manually, loans must be re-entered after being cancelled or declined, or automatically packaged loans must be adjusted. Please keep the following guidelines in mind when revising loans.

### **Loans that Will Disburse After October 1**

Any loan (regardless of whether 30-delay or regular) that will disburse on or after October 1 must use the NEW FEE item types.

### **No Change in Origination Fees**

Occasionally, there will be no change from one academic year to the next to the Direct Loan origination fees. In such a case, best practices are to continue to originate loans with current fee and NEW FEE (after October 1) item types as would normally be done in years where the origination fees change, to maintain consistency and habit.

### **Minimum Loan Amounts**

ctcLink is set up to not originate loans for amounts below $200 per quarter.

### **Loan prorations**

Loans will not automatically prorate even if there is a graduation term entered on the student’s program plan in the Academic tab. The loans will populate according to remaining Need and/or cost of attendance.

Perform the required proration calculation and adjust the loan amounts manually before validating and posting.

REMINDER: Loan prorations should use the following calculation:

Credit Hours Remaining / Credit Hours in Academic Year = Proration Percentage x Annual Loan Maximum

### **Loans at Another Institution**

Students may receive student loans at another institution for the same or other enrollment periods. The total amount of loan funds received from both institutions may not exceed the annual maximum allowed.

If awarding loans for the same period of enrollment, both schools must work together to make sure the student is not overawarded loan funds for the academic year.

Pay attention to incoming aggregate amounts in case they need to be adjusted to allow eligible loan amounts to be funded. Be sure to document in the student’s physical file and on the Financial Aid Status page for the benefit of the loan program specialist.

**Navigator: Financial Aid > Awards > Aggregates > Update Incoming Aggregates**

### **Expired Master Promissory Notes**

If a student’s Master Promissory Note expires during a loan period and the student completes a new one, alert the Direct Loan program specialist so that the MPN record can be manually overridden to allow the loan to disburse.

**IMPORTANT**: The loan will never disburse unless the manual override is processed; the loan specialist **must** be made aware of these records to prevent delays in funding affected students.

### **Recycling Loan Item Types**

Reusing loan items types inappropriately can cause loans to be rejected by the Common Origination and Disbursement system (COD). The following chart shows when loan item types can or should not be reused after having been cancelled.

|  |  |
| --- | --- |
| **Status** | **Acceptable Actions** |
| **Before first loan origination batch (offered and accepted loans)** | |
| **Not accepted** | Increase, decrease, reuse item types if previously cancelled |
| **Accepted** | Increase, decrease, reuse item types if previously cancelled |
| **After first loan origination batch (accepted loans only)** | |
| **Loan is rejecting** | OK to correct and redo using the same item type **ONLY IF** the loan is rejecting before going to COD (enrollment issue, missing student address, etc); do not have to wait for COD adjustment  To view pre-COD rejects:  **Navigator > Financial Aid > Loans > Direct Lending Management > View Loan Processing Actions**  If the reject is after the loan has gone to COD, use the next item types |
| **Loan has been accepted by COD** | Do not reuse item type even if loan is being reactivated for the same loan period. Use next item types. |

### **30-Day Delay Loans**

With the exception of Summer Quarter, all 30-day delay loans must use the NEW FEE item type because they will originate after October 1.

**TIP FOR AUTOMATICALLY PACKAGED LOANS**: If the system tries to award regular (current fee) loans but the loans should be 30-day delay:

* Remove the X in the NEW FEE loan item types with the 30-day delay disbursement plan and split code and manually enter the amounts the student is eligible to receive
* Enter an X in each of the regular loan item types so that they’re removed when the awards are validated and posted

### **Second Year Loan Amounts**

Occasionally you will need to award loan funds at the second year level but the system will not allow it and will change the loan amount back to the $3,500 first-year maximum. In these cases, the Financial Aid terms must be modified. All terms covered by the loan must be modified. Be sure to document in the student’s file supporting information for the second-year status.

**Navigator > Financial Aid > Financial Aid Term > Maintain Student FA Term**

Do this for each term covered by the loan:

* On the **FA Term** tab, click the 🞣 in the **Student Data** section to create a new row
* Click the Financial Aid tab
* Change the **NSLDS Loan Year** to **2nd Year**
* Change the **Direct Lending Year** to **Second Year**
* Save

### **Parent PLUS Loans**

More than one parent may take out a PLUS loan on behalf of the same student. The loan amounts may not exceed the student’s unmet cost of attendance. Parents can apply for PLUS loans at <https://studentaid.gov/> under the Apply for Aid menu.

## **Awarding Respiratory Care BAS Students**

### **First and Second Year BAS Students:**

Students taking the first year general education requirements (45 credits) must be enrolled in either RCTRTPRQ (Respiratory Care BAS prerequisites) or LASDTAA (Associate in Arts DTA). Students coded in RCTRTPRQ will be eligible for student loans only at the preparatory coursework amounts and timeframe. AA-DTA-coded students must intend to complete the AA-DTA as well as the BAS.

Quarters 1, 2, and 3 are eligible for normal level aid, including two-year undergraduate level loan amounts.

Quarters 2 and 4 will result in tuition adjustments after the term begins, as they include both 200 level and 300 level courses; 300 level courses have a higher tuition rate. Students will be assessed the higher tuition rate and then later refunded after the adjustments are made.

Once admitted to the BAS portion of the program, students in the second year of the Respiratory Care Bachelor’s degree (RT 200 courses) are processed like another other financial aid-eligible program because there is no tuition difference (no longer eligible only for preparatory coursework loans).

### **Third & Fourth Year BAS Students:**

Starting in the Quarter 5, students are eligible for normal Pell and institutional funds and the higher amounts of Washington College Grant (WCG) and student loans.

The third and fourth year students (RT 300 & RT 400 courses) pay a higher tuition rate and have an increased budget. These instructions are for the third and fourth year students only.

**Navigator > Campus Community > Student Services Center, Academic tab**

* Check that active program is Respiratory Care BAS
* Check that the Respiratory Care BAS CAR is the one linked to the terms
* Check that the courses are 3rd & 4th level (300 & 400 numbers)

NOTE: Fourth Quarter, which has both 200 & 300 level courses, is considered 3rd level

**Navigator > Financial Aid > Financial Aid Term > Maintain Student FA Term**

* Make sure that FA Term lists the correct Program Plan for the terms the student will be enrolled in the BAS program

**Navigator > Financial Aid > Budgets > Maintain Term Budgets**

* Increase the tuition for all terms the student will be enrolled in the BAS program
  + Resident Tuition: $2300 (2021-22); $2,574 (2022-23)
  + Nonresident Tuition: $2900 (2021-22), $3149 (2022-23)
    - In the Budget Item section, click the 🞣 at the end of any row
    - In the new row, enter **PLAN** in the Category column and **PLAN** in the Item Code column,
    - Add the difference between standard tuition and BAS tuition in the Pell Amt, and LHT Pell Amount columns
    - Save
    - Repeat for each term the student is attending.
    - Click the Update Need Summary button

**Navigator > Financial Aid > Awards > Award Processing > Assign Awards to a Student**

* Make sure that the cost of attendance is correct; chart is in the Share drive in the current academic year folder > Internal Forms
* Pell should package according to the Pell chart (no special award increases)
* Washington College Grant and College Bound Scholarship – check the WCG and CBS eligibility pages to make sure students are awarded according to the MFI table for BAS degrees (located in the Share drive in the current academic year folder > Internal Forms > SNG, CBS Charts
* Loans:
  + Dependent maximums: $5,500 subsidized; $2,000 unsubsidized
  + Independent maximums: $5,500 subsidized; $7,000 unsubsidized
* Institutional funds: assign item type manually if students met priority and other requirements

## **Reactivating Previously Cancelled Aid**

If aid for the academic year was cancelled because the student didn’t attend, do not select a new Packaging Plan ID or change the Disbursement Plan. Doing so will cause issues with Pell origination and disbursements.

Use the same Packaging Plan ID and Disbursement Plan, and enter the funds for just the terms being reactivated.

## **Awarding non-FAFSA Students**

Occasionally, you might need to award non-standard funding to an Adult Basic Education student, a Non-Award Seeking student, or a student who has not completed a FAFSA. There are four steps to this process: Activate the aid year, build the Financial Aid Term, create and move the budget, and adjust the budget to make sure there’s enough room to enter the funding.

### **Activate Aid Year**

**Navigator > Financial Aid > Aid Year Activation > Manage Financial Aid Years**

* Click the 🞣 at the end of a row to add a new row
  + If this is the first aid year activated, you won’t have to add a row
* Enter the aid year into the Aid Year field
* Make sure the Institution field says “WA171”
* Save

### **Build Financial Aid Term**

**Navigator > Financial Aid > Financial Aid Term > Maintain Student FA Term**

* On the **FA Term** tab, click the 🞣 in the **Term Information** section
* In the **Term** field, enter the term code
* In the **Student Data** section:
  + Change **Academic Career** to **Undergraduate**
  + Change **Primary Program** to **ACADM**
  + Change **Campus** to **MAIN**
* Save

### **Create Budget**

**Navigator > Financial Aid > Budgets >Create Student Budget**

* In **Budget Terms**, enter the term code
* Click the **Build Budget** button
* Click the **Move Budget** button
* Save

### **Adjust Budget**

**Navigator > Financial Aid > Budgets > Maintain Term Budgets**

* In the Budget Item section, make sure the budget built with a high enough amount to accommodate the funding
* If an increase is needed:
  + Click the 🞣 at the end of a row in the **Budget Items** section
  + In the new row, enter **PLAN** in the **Category** field and **PLAN** in the **Item code** field
  + Enter the required increase in the **Amount** field
  + Click Save
  + Repeat for any other terms that need to be increased for funding
* Click the **Update Need Summary** button

## **Award Error Messages**

|  |  |  |  |
| --- | --- | --- | --- |
| **Msg Nbr** | **Message** | **Description** | **Action** |
| 9006 | *Item Type Maximum Award limit is zero; Invalid Item Type* | The item type, FA item type, related item type, or other limit maximum award limit must be a positive non-zero value. Update the appropriate item type setup page with a non-zero award limit and rerun packaging. | Retrieve looks at all FA terms for the aid year. If a student has FA Load of LTHT fall, and you try to award a loan W/SP, Retrieve looks at all FA terms and will throw this error. In this instance, you would want to manually award the item type |
| 9022 | *PELL -Invalid Title IV eligibility indicator.* | Student is not Title IV eligible for Federal Funds bases on the Title IV eligibility indicator. | Check Title IV elig indicator on 4th tab of ISIR in PS |
| 9023 | *PELL - Not Title IV eligible.* | Student is not Title IV eligible for Federal Funds bases on the Title IV eligibility indicator. | Check Title IV elig indicator on 4th tab of ISIR in PS |
| 9038 | *No matching aggregate level limit for a defined aggregate table.* | No matching aggregate level limit for a defined aggregate table. The aggregate level is specific in the item type to be awarded, but has not been specified in the aggregate limit table. Please update the aggregate limit tables as appropriate. | Check the set up of the Aggregate Aid Limits |
| 9039 | *Total disbursed award amounts exceed maximum award amount* | The student's total disbursed amounts exceed the maximum allowable award amount. The award has been reduced to the value of the sum of the disbursed amounts. This has created an over award condition. | Verify aggregate aid limits table is populated with correct information. Cumulative Limit and Max Terms should be blank. |
| 9050 | *NSLDS loan year is missing or has no corresponding Aggregate Level.* | The NSLDS loan year level (on the FA Term record) is missing or not found on the cross reference table of NSLDS/HERA levels with Aggregate levels. As a result, aggregate limits cannot be applied, and the award is rejected. Make the appropriate change and repackage this student. | Navigate to the Financial Aid Info tab for the students' FA Term. Verify the NSLDS Loan Year is populated. If it is not, the student is likely not enrolled in an FA elig program. Once student is in FA elig program and FA Term rebuilds, the NSLDS field will populate |
| 9102 | *Zero remaining spending limits for item type.* | If the packaging rule remaining spending limits for item type is a zero value, then an award is not made. Check the packaging rule for the remaining spending limit value and check the item type fiscal balances. If this is in not correct, please make the appropriate change, and repackage this student. | Check the fiscals for the item type in question. If award is truly out of funds, update packaging plan selection criteria query for that item type. |
| 9104 | *Award less than minimum award limit* | After initial assignment (either manually by the user or by the packaging process), the award value has been reduced below the minimum required award limit and the award cannot be made. | Check item type set up. |
| 9111 | *Student fully packaged.* | The student is fully packaged for this item type, and the award will be discarded. | Item type max has been reached |
| 9117 | *Not eligible for a PLUS loan; student does not have dependent status.* | This student does not have dependent status, and as a result, is not eligible for a PLUS loan. If this is incorrect, make the appropriate change, and repackage this student. | Check dependency status to ensure its truly Dependent |
| 9125 | *The custom split code percentages do not sum to 100%. Please contact our Financial Aid systems specialist or administrator for further explanation of this problem.* |  | Check the quarters you are awarding; wrong quarter/s are probably selected |
| 9126 | *Prof. Judgment, Need Override, or Locked award cannot have zero value.* | An award that is coded with a professional judgment, need override, or a locked award indicator cannot have a zero value. If required, please make the appropriate corrections and repackage this student. |  |
| 9127 | *The student aggregate area NSLDS level does match to aggregate area level.* | The student aggregate area NSLDS level does not exist in the aggregate area level table for this item type. To correct this, make the appropriate change to the student's NSLDS level or add a new level limit entry to the aggregate area table associated with this item type, and then repackage the student. | Verify aggregates are correct on the student's aggregate page (Update Incoming Aggregate). Also check the aggregate level and aggregate limit on Aggregate Aid Limits page |
| 9129 | *Aggregate Limits reached for Federal programs.* | The student has reached the aggregate limits for this Federal program. As a result, the student cannot be awarded this item type. |  |
| 9137 | *Student not Title-IV eligible.* | This student is not Title-IV eligible for Federal funds. If this is incorrect, make the appropriate change to the students Title-IV eligibility and repackage the student | Send necessary corrections in PS or FAA |
| 9142 | *Unsatisfactory Academic Progress; student Federally ineligible* | Satisfactory Academic Progress indicator is set as unsatisfactory ('N') and the student is ineligible for Federal funds. If this is incorrect, make the appropriate change, and repackage the student. | Review the SAP status on PSS page |
| 9149 | *Not PELL eligible based on combination PELL Index and PELL COA* | The student is not PELL eligible based on the PELL Index and the PELL COA. | Review student's Pell COA and budget on Maintain Term Budgets. EFC information can also be viewed by clicking Need Summary. |
| 9165 | *Manual Award reduced to be consistent with Financial Aid Need target* | The manual award has been reduced to be consistent with Financial Aid Need target | Review Need Summary on Assign Awards page. If necessary, the item type's Meet/Need Cost may need to be altered |
| 9182 | *No App Status only allows Conditional, No Effect, Cost Only, PLUS item type* | No Application status only allows for Conditional, No Effect, Cost Only, and PLUS item type awarding. | Determine what Meet/Need Cost set up should be on tab 2 of item type set up. Meet/Need Cost will determine how an item type affects unmet need balance and unmet COA balance. |
| 9193 | *At least one Net Scheduled Disbursement amount for this award has a value greater than it's corresponding Gross Scheduled Disbursement amount. Please consult your system administrator.* |  | FAO Note: Check Satisfactory Progress status – this message displays when student’s SAP status is other than MEET, WARN, or PROB |
| 9239 | *Pell award has been reduced by student's remaining Lifetime Eligibility* | Pell award has been reduced due to student's Lifetime Eligibility Used percent value greater than 500 percent but less than Lifetime Eligibility Maximum percent | Verify that the Update Incoming Aggregate page has the most current information. If the page is inaccurate, use the override fields on the page |
| 9338 | *Data Corruption -- Mismatch between Award and Disbursement Totals* | The student failed the posting process due to a mismatch between Award and Disbursement Totals. The student's awards were not posted. |  |
| 9401 | *Award reduced by FA or Fiscal item type limits* | The original award value has been reduced by 1 or more FA, Fiscal, or Packaging Plan Item Type limits. | Check the available amount remaining on the fiscals for the item type in question |
| 9405 | *PELL award reduced by Aggregate limits* | PELL award reduced by Aggregate limits. | Ensure the students FA Load on FA Term matches the students units of enrollment. If FA term is accurate, check Aggregate Aid Limits set up. If set up is correct, verify Pell amt on maintain term budgets is accurate |
| 9410 |  |  | Ensure student qualifies for 2nd-year Subsidized Loan amounts, then update the Financial Aid tab on the Maintain Student FA Term page to reflect 2nd-year status |
| 9419 | *This award is for an In-Transit loan; the award cannot be reviewed or changed* | This award is for an In-Transit loan; the award cannot be reviewed or changed | Wait until file comes back from COD and adjust |
| 9510 | *Student failed the Selection Criteria at the Packaging Rule level* | The student failed to qualify for this Item Type because Selection Criteria, at the Packaging Rule level, was not met. | Check selection criteria for that packaging plan |
| 9528 | *Award was auto-canceled.* | The award was canceled by an Auto Cancel Item Type. | Colleges have the ability of setting up awards to auto cancel when another award is placed. This can be done on tab 3 of the item type set up |
| N/A | *Award Posting Process Encountered Error(s) (14420,62)* | Award Posting process encountered errors and is unable to continue processing. It may be necessary to consult your System Administrator | Go in to the Financial Aid Item Type setup panel/page and change the item type back to Active. To prevent staff from using the item type, set the fiscal limits to $0.00. Verify that the term is associated with the correct Aid Year on FA Term. Change the setup back to where it was until the next aid year setup occurs. Only make changes to Aggregate Areas when you're completing the setup for a new award year, i.e. - before any aid has been awarded on an aggregating item type. Sync up at least the "Max to Offer" and "Max to Accept" fields.  FAO WORKAROUND: Try canceling Pell, validate, and post. DO NOT UNDISBURSE. Make your changes, validate, and post. Put Pell back in, validate, and post.  If that doesn’t work, cancel all aid, clear the browser cache, close the browser, restart the browser, and log back in to ctcLink. Then re-award with the Retrieve button and appropriate Packaging Plan ID. |

# **Completing the File Processing Worksheet**

* The mathematical calculations must be shown for grant and loan eligibility
  + Any resources known at the time of processing should be noted in the Resources section and accounted for in the math
    - If student receives an outside resource that could possibly be awarded for future terms, include an estimate for all future terms being awarded to prevent overawards when those funds are later entered
    - Add a comment to the Financial Aid Status page that the resource funding was estimated for future terms
    - Include 4th quarter Pell in calculation if student is attending all four quarters
  + Any reductions, or childcare- and program-related increases known to us at the time of processing should be noted in the Cost of Attendance Adjustments section and accounted for in the math
* Use full-time budget amounts unless the quarter has begun and the student is enrolled in less than full time
  + If reducing the budget for less than full-time attendance, note the reduction in the Cost of Attendance Adjustments section
* The Notes section is for any unusual issues that should be documented. Keep in mind that for every issue noted, its resolution must also be documented. (Ex: It is noted, “Student on suspension.” When the student has successfully appealed and the file is completed, the resolution is documented, “Appeal approved; now Probation.”)
  + The ISIR transaction that was verified must be noted on the worksheet, along with whether or not a correction was sent
  + If TEMPing a file that needs more documentation/other issues, the reason you are not completing the file at the time of your initial review must be documented on the worksheet (as well as the resolution once the issue has been resolved)
* The Professional Judgment section is for changes in financial circumstances or dependency status, or any other acceptable situation for which professional judgment was invoked; these **must** be documented

# **Loan-Only Communication**

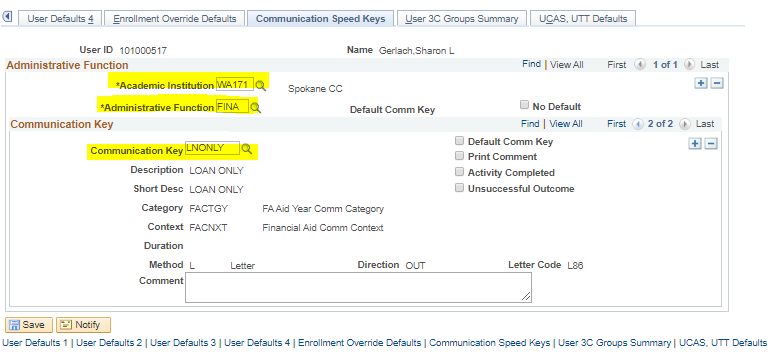
If a student is eligible for only student loans due to a high EFC, Pell LEU, BA degree, prereqs/preparatory coursework, etc., be sure to assign the Loan-Only communication to go out to the student.

## **Speed Key**

First, it helps to set up a speed key so you don’t have to keep entering the same information over and over for every loan-only student. You only need to do this once.

**Navigator > Set Up SACR > User Defaults**

* Use the  arrow until the Communication Speed Keys tab is visible and click on it
* Academic Institution: WA171 (should prepopulate if you’ve set up User Defaults)
* Administrative Function: FINA
* Comm Key: LNONLY
* Save

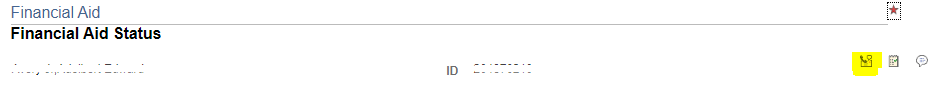
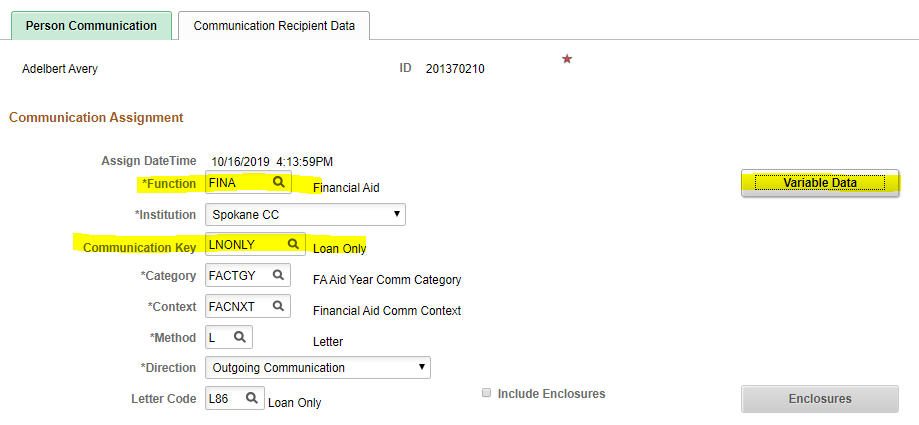


## **Assign Communication**

**Navigator > Financial Aid > View Financial Aid Status** (click Communication icon)

**Navigator > Campus Community > Communications > Person Communications > Communication Management**

* \*Function: FINA
* \*Institution: Spokane CC (should be prepopulated)
* Comm Key: LNONLY
* The rest of the fields will populate automatically
* Click Save



# **Professional Judgment**

When exercising professional judgment, please use the following processes for consistency within the office.

**Navigator > Financial Aid > Federal Application Data > Correct 20xx-20xx ISIR Records**

**Alternative:** [**https://faaaccess.ed.gov/FOTWWebApp/faa/faa.jsp**](https://faaaccess.ed.gov/FOTWWebApp/faa/faa.jsp)

## **Dependency Override (Dependent to Independent)**

Requires dependency override packet and third-party affidavit from student unless a homeless/risk of homelessness determination has been made

### **ctcLink:**

* In Correct 20xx-20xx ISIR Records, go to Assumptions\School Codes tab
* Click the + sign above the INAS button to create a new row
* In the Miscellaneous Information section, click the radio button next to **Dependent to Independent**
* Click the INAS button
* Make sure the Correction Status is set to Send; if not, select Send and click the Save button

### **FAA Access**

* Log in to FAA Access
* TG# is 51866 and school code is 003793
* Select applicable academic year
* Enter students social security number, last name, and first name
* Select transaction number to correct
* Click the Make Corrections button
* Create a transaction password or leave blank and click Next
* Click the Step 3 link at the top of the page
* In the Dependency Override drop-down box, select **FAA override from dependent to independent** (if a homeless/risk of homelessness determination has been made by FA supervisors, select the option **FAA homeless youth determination**)
* Click the Calculate EFC button at the bottom of the page
* Click the Print this Page button at the top of the new page
* In the Pages section of the Print window, enter 1 to print only the first page with the EFC determination and Click Print
* At bottom of page, click the Submit button and print the resulting page

**Tracking**

**Navigator > Financial Aid > View Financial Aid Status**

* Click the Add a New Comment icon at the top of the page

|  |  |
| --- | --- |
| * Administrative Function: * Comment Category: * Variable Data: * Department: * Comments: * Save | FINA  FAGEN  current academic year  99304  Dependency override approved |

**Worksheet**

* Make clear notes in the Professional Judgment box of the current year file worksheet the action taken and the reason for the action

## **Change of Financial Circumstances**

Requires Change of Financial Circumstances form and supporting documentation. If the student is dependent, both student’s and parents’ information must be from the same tax year.

### **ctcLink:**

* In Correct 20xx-20xx ISIR Records, go to the Student Information tab
* Click the + sign above the INAS button to create a new row
* Enter the new information according to the Change of Financial Circumstances document and supporting documentation
* If the student is dependent, repeat this step on the Parent Information tab
* In the Miscellaneous Information section, Check the box next to **Adjusted EFC Cal Requested**
* Click the INAS button
* Make sure the Correction Status is set to Send; if not, select Send and click the Save button

### **FAA Access**

* Log in to FAA Access
* TG# is 51866 and school code is 003793
* Select applicable academic year
* Enter students social security number, last name, and first name
* Select transaction number to correct
* Click the Make Corrections button
* Create a transaction password or leave blank and click Next
* Click the Step 2 link at the top of the page and make corrections to the student’s income according to the documentation
* If the student is dependent, go to Step 4 and correct the parents’ income according to the documentation
* In the Professional Judgment drop-down box, select **1 – EFC Adjustment Requested**
* Click the Calculate EFC button at the bottom of the page
  + Click the Print this Page button at the top of the new page
  + In the Pages section of the Print window, enter 1 to print only the first page with the EFC determination and Click Print
* At bottom of page, click the Submit button and print the resulting page

**Tracking**

**Navigator > Financial Aid > View Financial Aid Status**

* Click the Add a New Comment icon at the top of the page

|  |  |
| --- | --- |
| * Administrative Function: * Comment Category: * Variable Data: * Department: * Comments: * Save | FINA  FAGEN  current academic year  99304  AY eligibility was based on 20xx income. EFC changed from XXXX to XXX. Awards increased. |

**Worksheet**

* Make clear notes in the Professional Judgment box of the current year file worksheet the action taken and the reason for the action

## **Separation/Divorce after Awarded**

Requires V1 Verification Worksheet, copy of tax return or transcript, and W-2 forms or other documentation of income, if applicable.

### **ctcLink:**

* In Correct 20xx-20xx ISIR Records, go to the Student Information tab
* Click the + sign above the INAS button to create a new row
* Enter the new information according to the Change of Financial Circumstances document and supporting documentation
* If the student is dependent, repeat this step on the Parent Information tab
* In the Miscellaneous Information section, Check the box next to **Adjusted EFC Cal Requested**
* Click the INAS button
* Make sure the Correction Status is set to Send; if not, select Send and click the Save button

### **FAA Access**

* Log in to FAA Access
* TG# is 51866 and school code is 003793
* Select applicable academic year
* Enter students social security number, last name, and first name
* Select transaction number to correct
* Click the Make Corrections button
* Create a transaction password or leave blank and click Next
* Click the Step 2 link (step four if the situation applies to the parents) at the top of the page and make corrections to the student’s income information according to the documentation
  + Zero out the spouse income from work
  + Remove spouse’s income from the AGI
  + Remove any other income that belongs to the spouse
  + Remove spouse from the exemptions
  + Remove spouse from the number in household and number in college, if applicable
  + Click the Student Taxes Paid Calculator button (or Parent Taxes Paid Calculator button, if situation applies to the parent)
* In the Professional Judgment drop-down box, select **1 – EFC Adjustment Requested**
* Click the Calculate EFC button at the bottom of the page
  + Click the Print this Page button at the top of the resulting page
  + In the Pages section of the Print window, enter 1 to print only the first page with the EFC determination and Click Print
* At bottom of page, click the Submit button and print the resulting page

**Tracking**

**Navigator > Financial Aid > View Financial Aid Status**

* Click the Add a New Comment icon at the top of the page

|  |  |
| --- | --- |
| * Administrative Function: * Comment Category: * Variable Data: * Department: * Comments:   Save | FINA  FAGEN  current academic year  99304  Student (or parents) separated or divorced after FAFSA filed; removing spouse income better benefits student and demonstrates actual financial circumstances. |

**Worksheet**

* Make clear notes in the Professional Judgment box of the current year file worksheet the action taken and the reason for the action

## **Tax Return Line Items for 2020-21 & 21-22 Professional Judgment**

**2019 Tax Return Line Items for 2020-2021 Professional Judgment**

|  |  |  |
| --- | --- | --- |
|  | **1040 and Schedules** | **2020-21 FAFSA Question** |
| AGI | 1040 Line 8b | 36 (S) and 84 (P) |
|  |  |  |
| Income tax paid\* | 1040 Line 14 minus 1040 Schedule 2, Line 2 | 37 (S) and 85 (P) |
| Education credits | 1040 Schedule 3, Line 3 | 43a (S) and 91a (P) |
| IRA deductions and payments | 1040 Schedule 1, Line 15 + Line 19 | 44b (S) and 92b (P) |
| Tax-exempt interest income | 1040 Line 2a | 44d (S) and 92d (P |
| Untaxed portions of IRA, pension, and annuity distributions (withdrawals)\* | 1040 Line 4a minus 4b (exclude rollovers) | 44e (S) and 92e (P) |

**2020 Tax Return Line Items for 2021-22 Professional Judgment**

|  |  |  |
| --- | --- | --- |
|  | **1040 and Schedules** | **2021-22 FAFSA Question** |
| AGI | 1040 Line 11 | 36 (S) and 84 (P) |
|  |  |  |
| Income tax paid\* | 1040 Line 22 minus 1040 Schedule 2, Line 2 | 37 (S) and 85 (P) |
| Education credits | 1040 Schedule 3, Line 3 | 43a (S) and 91a (P) |
| IRA deductions and payments | 1040 Schedule 1, Line 15 + Line 19 | 44b (S) and 92b (P) |
| Tax-exempt interest income | 1040 Line 2a | 44d (S) and 92d (P |
| Untaxed portions of IRA, pension, and annuity distributions (withdrawals)\* | 1040 Line 4a minus 4b (exclude rollovers) | 44e (S) and 92e (P) |

**2021 Tax Return Line Items for 2022-2023 Professional Judgment**

|  |  |  |
| --- | --- | --- |
|  | **1040 and Schedules** | **2021-22 FAFSA Question** |
| AGI | 1040 Line 11  1040X Line 1C | 36 (S) and 84 (P) |
| Income earned from work | 1040 Line 1 + Schedule 1 Line 3 + Schedule 1 Line 6 + Schedule K-1 (Form 1065) Box 14 Code A  Form W-2 Box 1 | 38-39 (S) and 86-87 (P) |
| Income tax paid\* | 1040 Line 22 minus Schedule 2, Line 2  1040X Line 8 if Box 896 is checked on Line 15, use Line 8 – Form 8962 Line 29) | 37 (S) and 85 (P) |
| Untaxed portions of IRA, pension, and annuity distributions (withdrawals)\* | 1040 Line (4a + 5a) minus (4b + 5b)  (exclude rollovers) | 44e (S) and 92e (P) |
| Education credits | 1040 Schedule 3, Line 3  Nonrefundable education tax credits included in Line 7 | 43a (S) and 91a (P) |
| IRA deductions and payments | 1040 Schedule 1, Line 15 + Line 19 | 44b (S) and 92b (P) |
| Tax-exempt interest income | 1040 Line 2a | 44d (S) and 92d (P) |
| Tax-deferred payments to pensions & savings plans | Form W-2 Boxes 12a-12d, Codes D, E, F, G, H, S ONLY | 44a (S)  92a (P) |

# **Adjusting Awards (Increases and Decreases)**

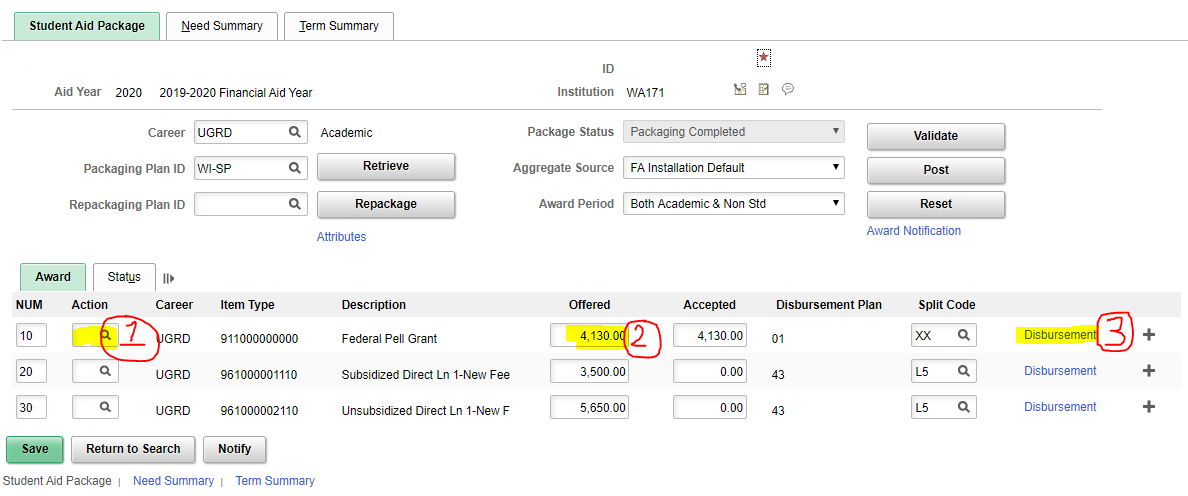
ctcLink operates on a carefully constructed system of cause-and-effect; numerous factors can cause a student’s data to post incorrectly when an adjustment is made. It’s best to make the following process a habit:

* Adjust awards
* Validate
* CHECK DISBURSEMENTS OF EACH FUND
* Post
* CHECK DISBURSEMENTS OF EACH FUND

You do not want to check just the award you added or adjusted, because data stored elsewhere in the system may cause another award to change.

## **How to adjust awards**

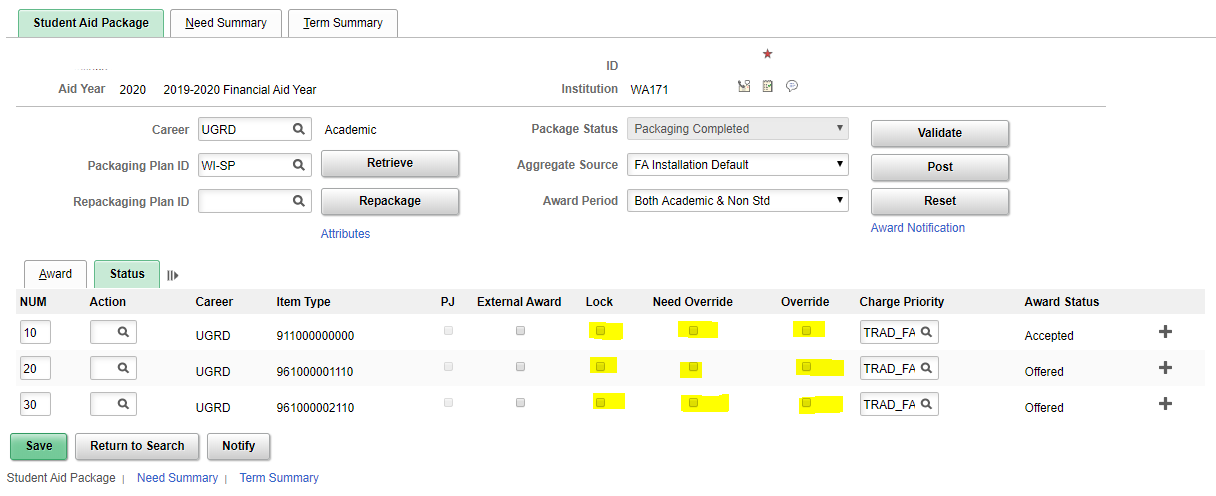
1. Enter a B (offer and accept) or a C (cancel) in the Action Box
2. Adjust the award amount – remember, this is the gross amount for the entire academic year
3. Click the Disbursement link and adjust the quarterly amounts
4. Validate
5. CHECK DISBURSEMENTS OF EACH FUND
6. Post
7. CHECK DISBURSEMENTS OF EACH FUND



If the disbursements for an award will not stay as you designated, you might have to lock the award to get it to stick:

In the Assign Awards to a Student page:

1. Adjust your gross award and the quarterly disbursements
2. Click the Status tab just above the awards
3. Check the Override box for the award you are adjusting (there should be a B in the Action box)
4. Click the Award tab just above the awards
5. Validate
6. CHECK DISBURSEMENTS
7. Post
8. CHECK DISBURSEMENTS
9. **DO NOT USE THE EA CHECK BOX** – it causes issues elsewhere
10. If this does not work, use Invoke Professional Judgment  
    **Navigator > Financial Aid > Awards > Award Processing > Invoke Professional Judgment**



# Sample worksheet

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **NAME:** |  | | | **PROGRAM:** |  | |
| **SSN:** |  | | | **PRQ ADMITTED WAITLISTED** | | **PRIOR EDUCATION: CERT AA AAS BA** |
| **EMPLID:** |  | | | **ACADEMIC PLAN FOR THRU** | | |
| **ADVISOR:** |  | **DOB**: |  | **DUAL DEGREE PROGRAMS:** | | |

|  |  |
| --- | --- |
| **NOTES:** | |
| **PROFESSIONAL JUDGMENT: Income Dependency Override DATE: BY:** | |
| **ACTION & RATIONALE:** | |

**Verified ISIR # Sent Corr No Corr PJ ISIR #: New EFC:**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **ISIR / 9 mo. EFC: # EFC:** | | |  | **COST OF ATTENDANCE ADJUSTMENTS** | | | | | | | |
| **Residency:** | | **Res Nonres** |  | **Reason** | **SU** | | **F** | | **W** | | **SP** |
| **Dependency Status:** | | **Indep Dep** |  | LTFT |  | |  | |  | |  |
| **Housing:** | | **Non Com** |  | Tools/Prg Costs |  | |  | |  | |  |
| **HS/GED:** | | **Yes No** |  | Daycare |  | |  | |  | |  |
| **Met FA Priority:** | | **Yes No** |  | Other |  | |  | |  | |  |
|  | | |  | **RESOURCES** | | | | | | | |
| **Workstudy: Y N** | | **Out of Funds** |  | **Source** | **SU** | | **F** | | **W** | | **SP** |
| **Met Priority: Y N** | | **Ineligible** |  |  |  | |  | |  | |  |
|  | | |  |  |  | |  | |  | |  |
| **SAP:** | **MEETS WARN PROB SUSP GD** | |  |  |  | |  | |  | |  |
| **Pace: %** | | **Meets Below** |  |  |  | |  | |  | |  |
| **Pell LEU:** | | **Near At/Over** |  | **LOAN PRORATION: Completing Degree 2-Qtr Certificate** | | | | | | | |
| % Used: %Rem.: | | |  | Type | Ln Amt | Rem Cr | | Proration % | | Max Amt | |
| **Loan Aggr:** | | **Sub Comb.** |  | **Subsidized** |  |  | |  | |  | |
| Amount/s Remaining: | | |  | **Unsubsidized** |  |  | |
| **WCG Total Qtrs:** | |  |  | **2nd Year Loans:** Yes No Elig Qtr (if no): **30-day**: Yes No | | | | | | | |
| **Misc Info:** | | | | | | | | | | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
| **DATE** | **QTRS** | **COA** | **EFC** | **RESOURCES** | **NEED** |
|  |  |  |  |  |  |
| **DATE** | **QTRS** | **COA** | **EFC** | **RESOURCES** | **NEED** |
|  |  |  |  |  |  |  |
| **DATE** | **LOAN PERIOD** | **COA** | **EFC** | **FIN AID** | **NEED** | **SUB AMT** |
|  |  |  |  |  |  |  |
| **DATE** | **LOAN PERIOD** | **COA** | **SUB LN FEE** | **FIN AID** | **ELIG** | **UNSUB AMT** |
|  |  |  |  |  |  |  |
| **DATE** | **LOAN PERIOD** | **COA** | **EFC** | **FND AID** | **NEED** | **SUB AMT** |
|  |  |  |  |  |  |  |
| **DATE** | **LOAN PERIOD** | **COA** | **SUB LN FEE** | **FIND AID** | **ELIG** | **UNSUB AMT** |

Once the sample worksheet is saved as a separate Word document, add this header (replace the XX with the current academic year):

**20XX – 20XX WORKSHEET – PERSONALLY IDENTIFIABLE INFORMATION**

# **Set up Merge Document for FA Worksheet:**

1. Save FA worksheet in your own drive
2. Create an Excel spreadsheet with the field headings you want to merge (such as name, SSN, and EMPLID)
   1. Enter data for your students
   2. Save spreadsheet
3. Open FA worksheet in Word
   1. Go to Mailings tab
   2. Click Select Recipients and choose Use an Existing List
   3. Navigate to your saved spreadsheet and double-click it
   4. Click in the blank box beside Name on the FA worksheet
   5. Click Insert Merge Field
   6. Select Name
   7. Repeat for remaining fields
   8. Save document
   9. Go to Finish & Merge
   10. Select Edit Individual documents
   11. In the Merge to New Document pop-up dialog box, select All (alternately, you can enter From and To information)
   12. Click OK
   13. A new document will be created showing your merged data
   14. Print merged worksheets

**To use merge document:**

1. Open Excel merge document
   1. Clear data from previous use
   2. Enter new data
   3. Save document
2. Open FA worksheet in Word
   1. Go to Mailings tab
   2. Click Select Recipients and choose Use an Existing List
   3. Navigate to your saved spreadsheet and double-click it
   4. Go to Finish & Merge
   5. Select Edit Individual documents
   6. In the Merge to New Document pop-up dialog box, select All (alternately, you can enter From and To information)
   7. Click OK
   8. A new document will be created showing your merged data
   9. Print merged worksheets

# **Watermark for NSLDS Printouts**

PERSONALLY IDENTIFIABLE INFORMATION - XX

# **Index**

@OWN 28

“GD” Suspension 27

150% of program 26

2019 Tax Return Line Items 6

30-Day Delay Loans 73

Ability to Benefit 9

Academic Plans 50

Academics tab 11

ACADM 11

Activate Aid Year 76

Add a Comment 56

adding program costs 58

Adjust Budget 76

adjust the monthly EFC 45

Admissions 7

admissions information 7

Adult Basic Education 75

Append a Comment 56

Applicant Progression 7

Assign Awards 58, 62

Assign Communication 1

ATB service indicator (ARQ) 9

Attending at Own Expense 27

Award Error Messages 77

Award Order Flowchart 67

awarded at another school 23

awarding on a previous ISIR 41

awards 1, 22, 63

BAH 43

Bio/Demo Data 20

Build Budget 58

Build Financial Aid Term 76

Change of financial circumstances 48

Change of Financial Circumstances 4

Changing Marital Status 49

checklist items 1, 54

Checklist Management-Person 54

Citizenship 18

Comment Codes 18

Documentation 18

original documents 18

V4 or V5 verification groups 18

Citizenship status 7

Comment Categories 57

cost of attendance 58

CPS-pushed ISIR 46

Create Budget 76

Create Student Budget 58

CTC Custom 62

CTC Interfaces 62

Cum Att Units to Exclude 28

cumulative earned credits 26

Current grade level 42

database match overrides 60

Database matches 46

Dependency Override 48, 3

Dependent to Independent 3

Direct Lending Year 74

Disburse After October 1 71

Disbursement Plan 75

disbursement plan 09 62

eligibility pages 62

expired passport 18

External Education 10

F01 service indicator 47

F03 service indicator 47

FAA Access 49

FAGEN 57

FAWDS 57

FCANCL 57

FFILE 57

File Processing Comments 56

File Processing Worksheet 0

FLOANS 57

FM link 45

Form G-845 19

FPLAN 28

FRECAL 57

FREDUC 57

FREPAY 57

full admit 7

Future-Dated Program Changes 14

G-845 18

GDSUSP 27

Graded Adult Basic Education Coursework 28

High School Completion 10

How to adjust awards 9

HR/IR 52

Inactivated Running Start group 7

INAS Rule Set 45

incoming aggregate amounts 72

Incoming Aggregate Amounts 25

Increases and Decreases 9

increasing for actual tuition costs 58

Ineligible SAP Status 28

Invoke Professional Judgment 65

ISIR 1, 20, 21, 31, 34, 35, 36, 37, 39, 41, 45, 48, 3

ISIR comment category 47

ISIR transaction 0

ISIR transaction and EFC used 56

ISIR vs Bio demo Mismatch 20

LEU 24

LNONLY 1

Loan prorations 72

Loans at Another Institution 72

Maintain Student FA Term 15, 73

Maintenance of UEMs 52

mathematical calculations 0

maximum aggregate 22

Minimum Loan Amounts 72

Monthly EFC 45

Move Budget 58

Multiple Program Plans 14

New Academic Plans 51

New checklist items 46

NEW FEE 71

New ISIRs 46

new verification group 47

Non-Award Seeking 75

non-FAFSA Students 75

Non-Graded Adult Basic Education Coursework 28

Non-resident 16

NSLDS 1, 22

NSLDS Loan Year 74

Order of Awards 65

Origination Fees 71

outside resource 0

Packaging Plan ID 75

Parent PLUS Loans 74

Pell Lifetime Eligibility Used 24

pending loan disbursements 22

Perform Auto Verification 34

Person Comment Detail 50

Personally Identifying Information 22

PII 22

Plan 11

PLAN 75

Post 63

preparatory coursework 11

prerequisites 11

Previously Approved Academic Plans 50

PRFTC 11

Professional Judgment 0

program 1, 11, 12, 26, 42

Program 11

proof of U.S. citizenship 18

Reactivating 75

Reasons for User Edit Messages 52

Recent High School Graduates 10

Recycling Loan Item Types 72

Required Fields for All Verification Tracking Groups 36

residency 1, 16, 20

Residency Mismatch 16, 20

Resident 16

Respiratory Care BAS 74

Revising Financial Aid Package 69

revising loans 71

Rollover Checklist Items 54

Sample worksheet 11

SAP 1, 26

SAP Contracts 27

SAP Status Chart 29

Satisfactory Academic Progress 1, 26

SAVE System 19

second year level 73

Second Year Subsidized Loans 73

Secondary Confirmation 18

Separation/Divorce after Awarded 5

Set Up SACR 1

Simulate Student Eligibility 27

Speed Key 1

Student Groups 11

Student Information Update form 14

Student Information Update Form 7

Student Program/Plan 14, 69

Student Services Center 7, 11, 74

Subsidized Usage Limit Applies 25

SULA 25

Summer enrollment 62

Summer Term Awarding 68

Suspense Management 46

Tax Transcript Decoder 38

Taxes Paid Clarification 38

TEMP 56, 0

third step verification 19

third-step confirmation of citizenship 18

Tips for “jiggling” 70

tool allowance 58

transitioning from Running Start 7

Update Incoming Aggregates 63

Update Need Summary 58, 76

User Defaults 1

User Edit Messages 52

V1 36

V2 36

V3 36

V4 36

V5 36

V6 37

Validate 63

verification 1, 31, 32, 34, 48

Verification flags 46

View Packaging Status Summary 60

View Packaging Summary 1

Waiving vs Completing vs Cancelling 54

Watermark 13

within 6 years of last attendance 7

work study 42

worksheet 1, 31, 32, 42