Awarding and Packaging Students

Understanding Awarding and Packaging Students

Important! Mass Change is a deprecated product. Support will be maintained for this product, but no new development will be produced for Mass Change. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

This section discusses early decision awarding, review of information relevant to awarding, awarding and packaging financial aid, award notification, and award updating.

The terms *awarding* and *packaging* are often used interchangeably. In Awarding and Packaging documentation, *Awarding* refers to manually offering one financial aid item type (award) at a time to a student. *Packaging* refers to awarding multiple awards at one time to create a financial aid award package for a student.

Early financial aid offers are made to students using award categories instead of specific awards. Award categories give "early decision" students an idea of the types of financial aid that they might receive without committing to exact awards. You define these award categories for your institution. For example, you might have categories for loans, scholarships, work-study, and grants. For awarding actual financial aid monies to the student, you use specific financial aid item types using one of the methods of awarding or packaging.

Before selecting awards for students, you review information on aggregate aid limits, restricted aid awards, and the student's status in the financial aid cycle. You can view aggregate aid information by aggregate area, such as Perkins or Stafford. If your institution uses the National Student Loan Data System (NSLDS) totals for the federal Stafford subsidized, unsubsidized, Perkins, Pell, and Student Education Opportunity Grant (SEOG) programs, ensure that NSLDS data has been loaded and pushed to the aggregate tables for direct use by the Awarding and Packaging processes. NSLDS totals are pushed to a specific aid year and you can override them on the Incoming Aggregate Aid component. You can also view a summary of aggregate aid for a student or look at aggregate information by institution.

You can use inquiry pages to monitor a process that awards restricted aid to students. Graduate departments that award merit-based aid might use the Restricted Aid pages. These pages provide information on the progress of the restricted aid awarding cycle; committee members can enter their final decisions, including the restricted aid award amount. This information can then be used to enter the restricted aid award for a student.

The Packaging Status Summary page contains information about a student's status in the financial aid cycle, such as financial aid application status, institutional or federal verification status, Satisfactory Academic Progress (SAP) status, and information related to packaging a student. You can use this page to prevent the Awarding process from continuing if certain parameters are established. For example, you might only award federal awards if the student is meeting SAP. To change a value on the Packaging Status Summary page for a group of students, use Mass Change.

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The Packaging Status Summary page has links to other pages where you can review or sometimes modify a student's information. These linked pages contain Financial Aid Term (FA Term) summary information, ISIR data, database match information, the student's financial need calculated with federal and institutional methodology (FM and IM), Pell processing information, Pell eligibility calculation overrides, restricted aid information, and the current financial aid award package information.

After reviewing information, you can award and package students for financial aid manually or in one of three automated ways:

- Manual Awarding is done online, one student at a time, entering awards one by one.
- Auto Packaging is done online at the student level and uses a packaging plan, a set of institutionally defined rules for awarding.

  After Auto Packaging generates a financial aid award package for the student, you can make any manual changes to awards in the package before saving the information.
- Mass Packaging is a background process for packaging groups of students using one or more packaging plans.

  You select your student population, using either a query definition, an equation, or an external file of students. Then the system assigns a packaging plan to each student based on the processing order and selection criteria associated with each plan. Finally, you initiate the actual Mass Packaging routine, which packages the students based on their assigned packaging plans. After each step in the process, you can further define your targeted population by removing individual students from the selection or packaging plan assignment process.
- Auto Select Packaging mimics Mass Packaging selection as the system evaluates both the Selection Criteria and the Processing Order for each packaging plan, and assigns a packaging plan to an individual student.

  You can manually update the package before saving, validating, and posting.

Auto Packaging, Auto Select Packaging, and Mass Packaging use packaging plans to generate award packages that appear on the same page you use for manual awarding. Packaging plans use rules predefined by the United States Education Department (USED), your institution, or both. You can manually modify any generated award package.

After packaging, a validation process verifies that all federal eligibility rules, aggregate aid limits, fiscal fund balances and rules, award rules and limits, and packaging plan rules are met. For automated processing, this is part of the final step when the award package is given to a student. For manual awarding, you click the Validate button to initiate the validation process.

After validation, use a financial aid award notification (FAN) to notify students of their award packages. To do so, you assign a communication to a student and use your choice of mail merge software. If awards change for a student, you send multiple FAN letters.

If a student declines the financial aid offered or declines a category of aid, such as loans, you can use mass actions to accept, cancel, or decline all or specific categories of aid.

Throughout the aid year, you can view summary information regarding the student's awards and the disbursement of those awards.

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Related Links

Defining Packaging Plans

Prerequisites

Although you can award students manually, the most efficient way to package financial aid awards is with Auto Packaging, Auto Select Packaging, Mass Packaging, or a combination of these three. You are encouraged to set up the parameters needed for Auto Packaging and Mass Packaging to take full advantage of the Financial Aid system.

For manual awarding—assigning individual awards to students, one student at a time—you must set up your defaults (installation defaults and aid processing rule sets), financial aid item types, aggregate aid limits, disbursement plans and disbursement split codes, award adjustment reasons, and award messages for FAN letters.

Related Links

Using Equation Engine in Packaging
Creating Equity Item Type Groups
Creating Related Item Type Groups
Defining Packaging Plans
Establishing Defaults
Defining Financial Aid Item Types
Setting Up Aggregate Aid
Defining Disbursement Plans and Split Codes
Setting Up Award Messages
Preparing for Early Financial Aid Offers

Understanding Manual Awarding, Auto Packaging, and Auto Select Packaging

The Award Entry component is used for manual awarding, Auto Packaging, and Auto Select Packaging. Use the Student Aid Package page for online manual awarding and Auto Packaging. View how each award affects unmet need and total aid amounts on the Need Summary page. Totals are updated on the Need Summary page after Validation. View the student's Financial Aid Term and term budget information on the Term Summary page.

Note boxes below field descriptions offer tips and directions for entering Pell Grants. If you set the award offer amount to zero dollars, the system calculates Pell Grants when Validation is run.

This section discusses:

- Online manual awarding.
- Auto Packaging.
- Auto Select Packaging.
- Need summary.

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- Need summary validation.

Related Links

Awarding Pell Grants

Online Manual Awarding

To award manually, populate the tabs on the Student Aid Package page and insert additional rows of awards as needed. To have the Validation process populate the offered amount for an award, leave the Offered field at zero and validate the award. For example, to determine the correct Pell Grant amount for a student, enter the Pell Grant financial aid item type, leave the offer amount at zero, and click the Validate button; the Pell Grant amount is calculated based on the student's eligibility and institutional rules and returned to the page with the scheduled disbursements.

After you enter all the awards for a student, run the Validation process before posting the awards to the award tables. Validation checks that the student is eligible for the awards and that no packaging rules have been violated. Validation includes edits for minimum and maximum award limits, aggregate limits, fiscal fund availability, federal eligibility, and financial aid item type rules. Validation can reduce an award amount or set an award amount to zero to comply with rules and limits. Validation must be successful before you can run the Posting routine, the final step for manually awarding students.

You can combine manual awarding with Auto Packaging. If you do not want a manually entered award to be discarded during Auto Packaging, select the Lock check box. Auto Packaging discards all unlocked awards, and these same financial aid item types can be re-awarded if the award is included in the packaging plan. However, for awards of a financial aid item type that have disbursement protection activated and have been at least partially disbursed, Auto Packaging preserves these awards but reduces the award amount to the amount that has been disbursed. Also, when the Packaging routine processes awards in active/passive mode (such as multicareer packaging, multiple award period processing, or Pell-only repackaging), Auto Packaging does not cancel awards processed in passive mode.

Auto Packaging

Auto Packaging assigns awards to a student based on the rules of the selected packaging plan so your packaging plans must be established before you can use the Student Aid Package page for Auto Packaging. Auto Packaging can be combined with manual awarding by changing the awards entered by the packaging plan or adding additional awards.

Auto Packaging assigns awards and validates the awards all at once. Validation checks that the student is eligible for the awards given and that no packaging or financial aid item type rules have been violated. Validation includes edits for minimum and maximum award limits, aggregate limits, fiscal fund availability, federal eligibility, and financial aid item type rules. Validation can reduce an award amount or set an award amount to zero to comply with rules and limits. If you make no changes to the awards after Auto Packaging, you can post the awards to the award tables directly. If you make manual changes to any awards after Auto Packaging, you click the Validate button to ensure the student is still eligible for the changed or new awards.

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Warning! If you repackage locked or disbursed awards using Auto Packaging, post that set of awards (click the Post button) *before performing any validation activity* (click the Validate button). That is, if you use Auto Packaging to repackage a student who has locked awards, disbursed awards, or both, click the Post button first. Do not click the Validate button immediately after Auto Packaging. If you manually change an Auto-Packaged set of awards, post before validating. If you click the Validate button before posting a set of awards that was returned from Auto Packaging, it can potentially compromise the synchronization between offer and accept amounts as well as produce a different award than anticipated.

Note: If the student does not have locked or disbursed awards, you can repackage that student using Auto Packaging and then manually change the awards or validate without posting first.

Auto Select Packaging

Auto Select Packaging selects the packaging plan for an individual student and career by using the selection criteria (equation) and processing order associated with your packaging plans. This is the same selection criteria and processing order used by Mass Packaging.

When you leave the Packaging Plan ID field blank and click the Retrieve button, the system evaluates the Packaging Plan table sequentially and assigns the first packaging plan for which the student qualifies. The system next packages a set of eligible awards according to the packaging rules defined on the packaging plan.

Note: Before using Auto Select Packaging, ensure that your processing order is correctly set in your Packaging Plan table.

Related Links

Performing Mass Packaging Using Application Data

Need Summary

The Need Summary page displays the student's Cost of Attendance (COA), Pell COA, Alternate Pell COA, Expected Family Contribution (EFC), federal and institutional need, federal and institutional award totals, need-based aid award totals, federal methodology (FM) and institutional methodology (IM) special need/cost aid award totals, unmet need, and unmet COA.

The Need Summary page displays the prorated EFC (federal) and institutional EFC values for a student used to determine the student's need. When using different application data sources for packaging, it is important to understand how the EFC and need are affected by different packaging data source selections. For example:

Scenario 1: When the packaging data source on the Financial Aid Defaults page equals *Fed Only, Fed, Inst,* or *Inst, Fed* and only federal data exists for the student, if you award a financial aid item type with an institutional packaging methodology, the financial aid item type is awarded based on the institutional need. But, if you do not have institutional application data and analysis, institutional need equals institutional COA, because the institutional EFC is 0.00 USD. The Packaging routine awards institutional financial aid item types up to the institutional COA.

Scenario 2: When the packaging data source on the Financial Aid Defaults page equals *Inst Only, Fed, Inst,* or *Inst, Fed* and only institutional data exists for the student, if you award a financial aid item type with a federal packaging methodology, the financial aid item type is awarded based on the federal need.

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But if you do not have federal application data and analysis, federal need equals federal COA, because the federal EFC is 0.00 USD. The Packaging routine awards federal financial aid item types up to the federal COA.

If your institution uses IM for early awarding—in October, as an example—and you want to include estimated federal awards, set the Packaging Methodology field on the FA Item Type 2 page for your federal financial aid item types to *Institutional Methodology.* This allows the Packaging processes to use the same need calculation for all the awards; because you have only institutional data you use institutional need. When the federal aid year begins on January 1, you *must* change the Packaging Methodology field back to *Federal* for all your federal financial aid item types. You must also make sure that the student has application data compatible with the packaging data source you indicated on the Financial Aid Defaults page.

Related Links

Defining Awarding and Rounding Rules

Defining Installation Level Defaults

Need Summary Validation

Sometimes a manual change to the student's budget does not automatically propagate to the need summary totals. In this case, if you create selection criteria that rely on need-related elements, such as Unmet Need, Overaward Need, Unmet COA, or Overaward COA, the system is not using the most current calculated values.

Run the Need Summary Validation process before performing online packaging (manual, Auto, or Auto Select), Mass Packaging, online Repackaging (manual, Auto, or Auto Select), or batch Repackaging. This ensures that need-related elements, which may be part of your selection equation or PS Query, are updated and reflect the most recent changes to COA. You can run the batch Need Summary Validation process at any time. After you run it on your population, you do not need to run it again unless you make budget changes to several students using the Student Budget Maintenance component. To make a single change online, use the Update Need Summary button on the Student Budget Maintenance page (STDNT_TERM_BUDGET).

Related Links

Running the Need Summary Validation Process

Understanding Mass Packaging

Using Mass Packaging, you can award financial aid for groups of students. A Mass Packaging definition can identify the group of students being selected for Mass Packaging. You can then associate one or more packaging plans with that population. You can evaluate your selected population and the packaging plan associated with each student before Mass Packaging takes place. The system selects the optimum packaging plan for each student based on the combination of your packaging equations and the processing order of the packaging plan. Then the system applies the packaging plan against those selected students, awarding each student based on the defined packaging plan rules.

Three processes are run as part of Mass Packaging. The first process selects students to be included for Mass Packaging evaluation. The second process assigns packaging plans to students. The third process reviews the student's eligibility, the program rules, and other eligibility criteria and then awards

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financial aid to students using the assigned packaging plans. After the first two processes, you can review the students being selected and the assigned packaging plans. You can also review the order in which the students are packaged, again by packaging plan. Finally, you can delete unwanted students. You can run the third process in live mode or in simulation mode to review expected packaging results. Mass Packaging refers to this three-step process. The Mass Packaging process is the third step in Mass Packaging.

Before using Mass Packaging, consider the results that you want the system to produce according to your institution's packaging philosophies. Determine the student attributes to use in the packaging equations to select the correct students for each packaging plan. Review the criteria each packaging plan uses to select students. If some of the selected students cannot be matched to any of your packaging plans, review the list of these students to determine why the they did not get matched. Adjust your equations to ensure that these students are assigned correctly.

Note: Your packaging plans must be completely established before you begin Mass Packaging. After you start Mass Packaging, do not make any changes to your packaging plans until you have run all three processes. If you make changes to your packaging plans, rerun the Mass Packaging processes starting with the selection process. Changing packaging plans after students have been selected or assigned to packaging plans may produce incorrect or undesirable results during the Mass Packaging process.

Related Links

Defining Packaging Plans

Awarding Online

This section discusses how to:

- View need summary information.
- View term summary information.
- Use Auto Packaging and Auto Select Packaging.
- View award disbursement detail.
- Document award adjustments.
- Award students manually.
- Use professional judgement.

Pages Used to Award Online

Page Name	*Definition Name*	*Navigation*	*Usage*
Need Summary	STDNT_AWARD_NEED	Financial Aid > Awards > Award Processing > Assign Awards to a Student > Need Summary	View need summary information for a student.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Term Summary	STDNT_TERMDATA_SUM	Financial Aid > Awards > Award Processing > Assign Awards to a Student > Term Summary	View budget and Financial Aid term information by term. Each term has a distinct career tied to it.
Student Aid Package	STDNT_AWARD_ENTRY3	Financial Aid > Awards > Award Processing > Assign Awards to a Student > Student Aid Package	Use this page for manual, auto, or auto select packaging. Auto Packaging and Auto Select Packaging can be combined with manual awarding in the same awarding session.
Award Disbursement Detail	STDNT_PKG_DISB_SEC	Click theDisbursement link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	View award disbursement ID detail as well as create custom split amounts and customize loan fee amounts.
Packaging Message	PKG_MESSAGE_SEC	Click the Message link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	View the reason why a particular financial aid item type failed or was reduced by validation or Auto Packaging.
Award Adjustment	AWARD_ADJUST_SEC2	Click the Reason link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	Document award adjustments by assigning an award adjustment reason to any adjusted award Action.
Manual Student Packaging	STDNT_AWARD_ENTRY5	Financial Aid > Awards > Award Processing > Assign Departmental Awards > Manual Student Packaging	Award students manually. Prohibits the use of auto packaging.
Professional Judgement	STDNT_AWARD_ENTRY4	Financial Aid > Awards > Award Processing > Invoke Professional Judgement > Professional Judgement	Use professional judgement to override all rules (including federal and aggregate rules) except for fiscal limits when awarding financial aid. Award students without a budget. All item types awarded from this component are set to locked.

Viewing Need Summary Information

Access the Need Summary page (Financial Aid > Awards > Award Processing > Assign Awards to a Student > Need Summary).

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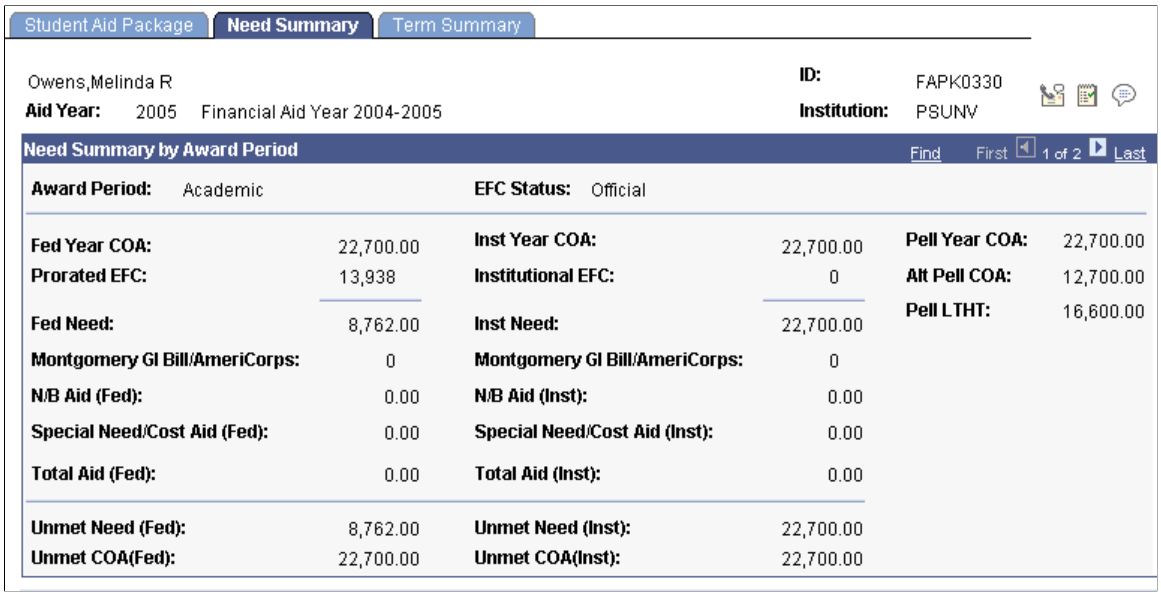
Image: Need Summary page

This example illustrates the fields and controls on the Need Summary page. You can find definitions for the fields and controls later on this page.



Award Period	View the different award periods *(Academic* or *Non-Standard)* by using the scroll arrows.
EFC Status (expected family contribution status)	Displays the status of the prorated EFC: *Official, Rejected,* or *Unofficial.*
Fed Year COA (federal year cost of attendance) and **Inst Year COA** (institutional year cost of attendance)	The federal or institutional COA for the award period.
Prorated EFC and **Institutional EFC**	The prorated EFC and the institutional EFC are the EFCs adjusted for the number of months from the Budget Duration on the FM (Prorated) or IM (institutional) extension record—entered on the Global and Federal Options page and the IM Value Parms 1 page, respectively.
Fed Need (federal need) and **Inst Need** (institutional need)	The federal or institutional COA minus the EFC. This is the student's financial aid need.
Montgomery GI Bill/AmeriCorps	Displays the amount you entered on the Veteran's Education Benefits page. The same amount is entered in the federal and institutional columns.
N/B Aid (Fed/Inst) (need-based aid federal/institutional)	The amount of need-based aid awarded to the student. This is determined by the Meet Need/Cost attribute of the financial aid item type.
Special Need/Cost Aid (Fed/Inst) (special need/cost aid federal/institutional)	The amount of special need/cost aid awarded to the student. This is determined by the Meet Need/Cost attribute of the financial aid item type. Special need/cost aid always reduces the student's need first, then replaces the student's EFC.

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Total Aid (Fed/Inst) (total aid federal/ institutional)	The total amount of aid awarded for federal and institutional calculations. This is N/B Aid plus Special Need/Cost Aid.
Unmet Need (Fed/Inst) (unmet need federal/institutional)	The Fed/Inst Need minus Total Aid.
Unmet COA (Fed/Inst) (unmet COA federal/institutional)	This is the Fed/Inst Year COA minus Total Aid.
Pell Year COA	The student's COA calculated by adding up the budget items that have an associated Pell category. This COA is used when calculating Pell Grants using the Regular Federal Pell Grant Schedule.
Alt Pell COA	The COA used when determining if a student's Pell award should be calculated using the Alternate Pell Grant Award Schedule. This COA is calculated by adding up budget items that have associated Pell categories of *Tuition, Child Care,* and *Disability.*
Pell LTHT (Pell less than half-time)	Displays the Pell less than half-time amount. The system determines which Pell annual COA to use when calculating each term Pell award. If the term enrollment is less than half time, the system uses the less than half-time Pell annual COA to determine the Pell award.

Viewing Term Summary Information

Access the Term Summary page (Financial Aid > Awards > Award Processing > Assign Awards to a Student > Term Summary).

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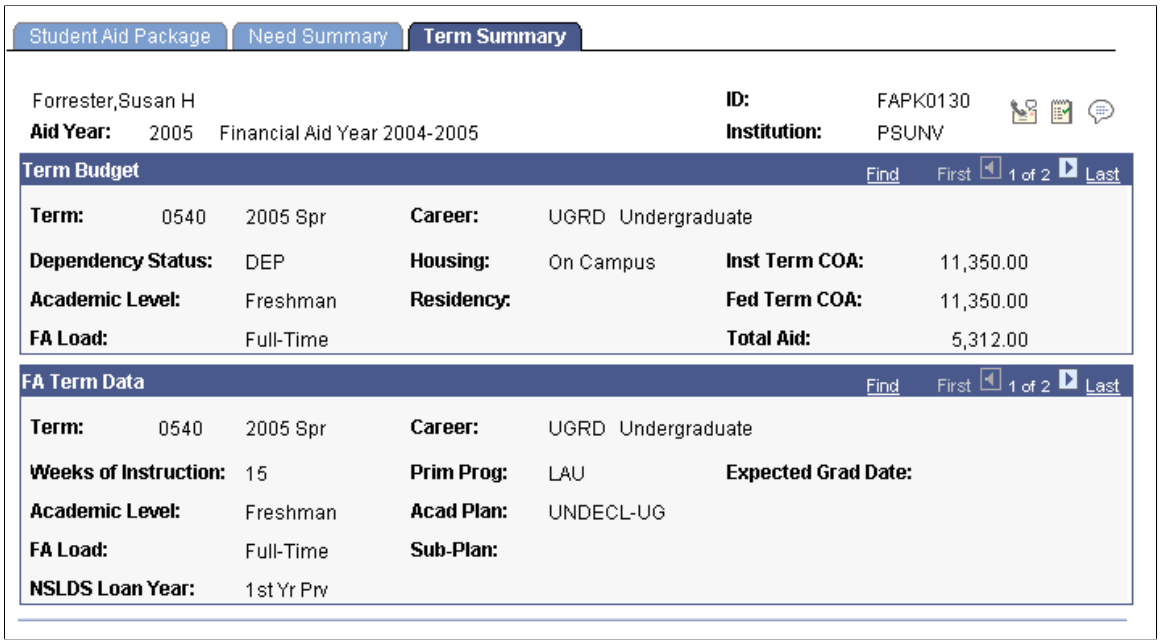
Image: Term Summary page

This example illustrates the fields and controls on the Term Summary page. You can find definitions for the fields and controls later on this page.



The Term Budget group box displays the term and the corresponding career. Use the scroll arrows to see each term within the aid year. The following fields are also displayed.

Dependency Status	Indicates whether the student is a dependent or independent student.
Academic Level	The student's academic level for the term and career. Academic level comes from the Financial Aid Term data.
FA Load	The financial aid load for the term and career shown. Financial aid load can be full-time, 3/4-time, half-time, and less than half-time.
Housing	Displays the housing option specified by the student on the ISIR, like on campus or off campus.
Residency	Displays whether a student is considered a state resident or not. This value comes from the residency data in personal data.
Inst Term COA (institutional term COA)	This is the term-based institutional cost of attendance by career.
Fed Term COA (federal term COA)	This is the term-based federal cost of attendance by career.
Total Aid	This is the total of all disbursements for all awards within the given term. This value is derived by adding all the disbursements for different awards that fall in the same term.

The FA Term Data group box displays data for the term from the Financial Aid Term component. Use the scroll arrows to see each term within the aid year.

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Related Links

Building a Financial Aid Term

Using Auto Packaging and Auto Select Packaging

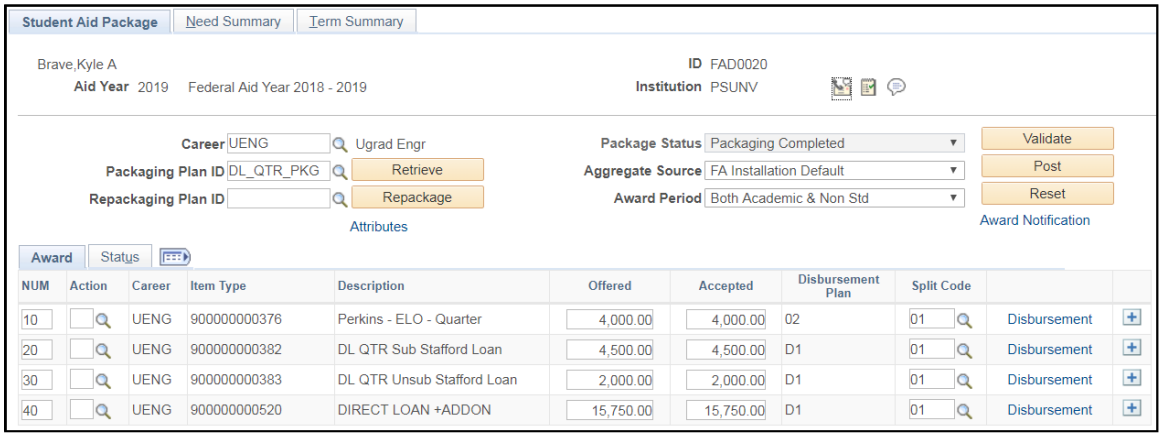
Use the Student Aid Package page for Auto Packaging and Auto Select Packaging individual students. You select the packaging plan for Auto Packaging and the system selects the packaging plan for Auto Select Packaging:

- For Auto Packaging, select the packaging plan in the Packaging Plan ID field and then click the Retrieve button.
- For Auto-Select Packaging, leave the Packaging Plan ID field blank and click the Retrieve button. Using the processing order and selection criteria (equation) associated with packaging plan in the Packaging Plan table, the system evaluates each plan and selects the first plan for which the student meets the selection criteria.

Access the Student Aid Package page (Financial Aid > Awards > Award Processing > Assign Awards to a Student > Student Aid Package).

Image: Student Aid Package page: Award tab

This example illustrates the fields and controls on the Student Aid Package page: Award tab. You can find definitions for the fields and controls later on this page.



Note: Click the tabs in the scroll area to access multiple views of this page. Fields common to both Award and Status views are documented first.

Common Page Information

Bundle 52

Added Attributes link to access User Variables set up using the Common Attribute Framework.

Career The active career for the student to be used for packaging at this time. If the student has only one career, it is defaulted into the field. Choose from among the current valid careers for the student—defined on the Financial Aid Term record, which you

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can change on the FA Term page—and careers for which the student has received any financial aid awards.

After you select a career, do not change this field until after you click the Post button or the Reset button. This prevents you from changing awards for more than one career at a time.

Only the packaging plans and disbursement plans associated with the active career are available during this awarding session.

Note: If the student has only one career for the aid year, that career defaults into the Career field and you do not need to select a career.

Packaging Plan ID

The packaging plan you want to use to package the student. Only packaging plan IDs that match the student's career are available.

Retrieve

Click to run Auto Packaging or Auto Select Packaging. The awards associated with the packaging plan appear in the Award and Status tabs. If a student is not eligible for an award in the packaging plan, the award amount is set to zero, and a Message link displays. If nonzero awards are returned, a disbursement link displays the scheduled disbursements for the award.

Awards that are not locked on the Student Aid Package page are canceled when Auto Packaging is performed, with the exception of already disbursed awards of a financial aid item type that has disbursement protection activated.

Note: When you click the Retrieve button, you can receive the following error message: *The assignment to the specified field failed.* This indicates that one of the student's award amounts exceeds the size of the Offered and Accepted fields. This error can occur when the student receives the term limit maximum 999,999.00 USD for multiple terms in an aid year. The resulting award amount (if two terms exist, 999.998.00 USD) is larger than the field.

Attributes

Click this link to access User Variables set up using the Common Attribute Framework.

The Common Attribute Framework enables you to define a common attribute and add the common attribute as a data field to any Campus Solutions page. A user can then enter a value on the page for the data field.

Use the Common Attribute Framework to create attributes for the Student Awards feature. Create attributes using the Common Attribute component (Set Up SACR, Common Definitions, Common Attributes Setup, Common Attribute) and then use the Record Context component (Set Up SACR, Common

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Definitions, Common Attributes Setup, Record Context) to associate attributes with the STDNT_AWARDS record.

See:

- "Defining a Common Attribute" (PeopleSoft Campus Solutions 9.2: Campus Community)
- "Associating a Common Attribute to a Record" (PeopleSoft Campus Solutions 9.2: Campus Community)

Package Status

This field is known as the Aid Processing Status field on the Packaging Status Summary page (Financial Aid > View Packaging Status Summary). Various financial aid processes automatically update the packaging status. You can manually change the package status after award posting, and you must save your change before exiting the page. You can use the package status to set the packaging status to a value other than *Completed* after you have posted an award. For example, if a department award is manually awarded and then you want to use Mass Packaging, you would want to set the package status from *Completed* back to *Package.*

Applied: The student has applied for financial aid. This value is automatically populated when you load a financial aid application such as an ISIR or a PROFILE application.

No App Rcd (No Electronic Application Received): No electronic application has been received.

Completed (Packaging Completed): The student's award package has been posted. The Posting routine automatically updates the field to this value.

Review (Ready for Counselor Review): The student should be or is currently being reviewed by a financial aid counselor.

Package (Ready for Packaging): The student is ready for packaging.

Repackage: The student is ready for repackaging. Can be set by the External Award Load process.

Aggregate Source

This field enables you to set the aggregate source to assess a student's lifetime aggregate aid history during the Awarding and Packaging process. You can set the aggregate source at the financial aid installation default level and on the Packaging Status Summary in addition to each of the award page components.

Default: Directs awarding and packaging to use the Aggregate Source value set at the FA Installation level.

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NSLDS: Directs the awarding and packaging to use NSLDS aggregate totals that have been loaded and pushed into the aggregate tables.

PS: Directs awarding and packaging to use aggregate undergraduate and graduate totals that have been completely maintained by the institution and Financial Aid packaging process.

Note: An Aggregate Used field is also provided on the Packaging Status Summary page. Aggregate Used captures the exact aggregate source used in the most recent awarding or packaging for this student.

Award Period

Provides the Packaging routine with the intended award period processing mode for the award period that you are currently packaging. The routine uses this information to determine automatically which existing awards are active or passive. The award period you select functions like the packaging plan award period attribute in the determination of passive/active mode for existing awards. When the Packaging routine employs passive/active mode processing, you can treat the awards in one award period (academic) as passive awards while awarding the other award period (nonstandard). The Packaging routine does not modify or repackage passive awards; it preserves them, unlike active awards that are subject to change. However, the Packaging routine still includes the award amounts of passive awards in determining remaining annual aggregate limits or other eligibility requirements and in updating need summary balances.

After you select an award period, the Packaging routine evaluates the disbursement plan/split code pattern for each of the existing posted awards and determines whether the pattern matches or falls within the selected award period mode. The Packaging routine then makes the rows of passive awards unavailable, indicating that these awards cannot be modified by either you or the Packaging routine. All other awards can be modified.

After you select the award period for a student, you must complete your activity for the selected award period. Validate and post the awards or click the Reset button to clear the results before you can select a new award period for that student.

Both: You are currently packaging the student for both award periods. This is the default value. The Packaging routine reevaluates all existing awards, processing all awards as active awards. When you select *Both,* all awards are available for reevaluation.

Academic: You are currently packaging the student for the academic award period (AAP) only. The Packaging routine

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reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the AAP or for both award periods. The Packaging routine processes all other existing awards as passive awards.

Non-Std (nonstandard): You are currently packaging the student for the nonstandard award period (NSAP) only. The Packaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the NSAP or for both award periods. The Packaging routine processes all other existing awards as passive awards.

Validate

Click this button during manual packaging to have the award package checked by the Validation process after you enter each award or after you enter all awards. During validation, all eligibility rules, aggregate limits, minimum and maximum award limits, fiscal fund availability, and financial aid item type rules are checked. To determine the maximum award limit, the Validation process uses the lowest maximum award limit from the maximum limits set at the item type, financial aid item type, aggregate aid limit, fiscal item type, and packaging plan levels. The Validation process uses the lowest minimum award limit from the minimum limits set at the item type, financial aid item type, and packaging plan levels.

The Validation process may cancel an award or lower the award amount to comply with established rules and limits. If validation fails on any award, a Message link appears in the award row. Validation may also reduce an award amount or set an award amount to zero. Any awards that are assigned a zero dollar amount when you run Auto Packaging are removed during posting. When you are manually packaging a student, you can have the Validation process populate the correct award amount based on the student's eligibility and institutional rules by entering a zero amount for the award. An award must be successfully validated before you can post the award.

During manual packaging, the Validation process does not impose restrictions on offering unsubsidized Stafford loans before you award students their full subsidized Stafford eligibility. You are responsible for offering students their full subsidized Stafford eligibility before offering unsubsidized Stafford loans.

Post

Click to save the award information and update the student award tables. If any award fails to post, an error message is displayed and none of the awards are posted. If you do not post the student's awards before leaving the page, the awards are not saved.

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Note: If you award two instances of the same item type where one instance of the item type has aggregate levels associated with it and the other instance does not have aggregate levels associated with it, the Award Posting routine returns an error. For federal item types, you must cancel the instance that does not have the aggregate levels associated with it and re-award the instance with associated aggregate levels. For item types that are not designated as federal, any award that has previous matching aggregate level history is rejected if no matching level limit record exists. You also receive this message, "No matching aggregate level limit for a defined aggregate table." You must then correct the error by either eliminating the aggregate history for the level or by reestablishing level limits for that award.

Reset

This button refreshes the page with any previously posted awards and removes any awards that you attempted to make on the page before posting during the awarding session. Posted awards are not removed. Click this button to validate new awards and see what effect the new awards might have toward the existing package before you post them.

Nbr (number)

The sequence number is automatically assigned in increments of ten when awards are entered. Click in the field to modify the sequence number and to change the number. You can control the order of new or existing awards by using a sequence number in between two existing sequenced awards. Duplicate sequence numbers are not permitted. The sequencing of awards is always preserved throughout the packaging session of the student.

All awards for the passive careers are sequenced to the top of the packaging sequence. These passive awards are not changed regardless of need or other changes in the student's record.

Action

Select the action being taken on the award. When initially entering a new award, the values are *B—Offer/Accept, O—Offer,* and *X—Discard.*

After an award has been posted, the values are *A—Accept, B—Offer/Accept, C—Cancel, D—Decline,* and *O—Offer.*

Any change to an award action is logged in the Award Activity Log, which can be viewed on the Award Activity page.

A—Accept: Accepts an award that has been offered to the student. If a student wants to accept less than the new offered amount — for an item type that is not a loan — the student can use the action A.

B—Offer/Accept: Use when you are initially offering an award to a student for which an explicit acceptance from the student is not needed (such as grants, scholarships, and so on). If you select this option and modify the existing award, the system automatically changes the accepted amount to the offered

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amount of the existing award. If you increase an existing award, the system replaces the accepted amount with the new offered amount. Similarly, the same behavior takes place for reduced awards.

C—Cancel: Cancels the award, but retains the award entry with a zero amount in the list of awards for that student. If you cancel an award, the award amount is reduced to zero, and the need summary and related award and fiscal pages are updated.

D—Decline: Declines the award, but retains the award entry with a zero amount in the list of awards for that student. If you decline an award, the award amount is reduced to zero, and the need summary and related award and fiscal pages are updated.

O—Offer: Offer the award to the student. The accepted amount is zero.

X—Discard: Deletes the award row when validation is performed if the award has not been posted. For example, you would use this status if you entered an award in error or you decided not to award the student a particular financial aid item type.

Career This field displays the career for which you made the award. This indicates which career is associated with each award.

Item Type The financial aid item type ID for the award that you want to award.

Award Tab

See the previous exhibit for an example of this tab.

Description Description of the financial aid item type. This field is populated when you move out of Item Type field.

Offered The amount that you want to offer the student for this award. If no amount is entered during manual packaging and the action is *O* or *B,* the Validation process assigns an optimal award amount based on the student's eligibility, the student's financial need, the aggregate aid limits, and the financial aid item type limits.

For Pell Grants, leave the offered amount at zero dollars to have the Validation process calculate the Pell Grant amount for the student based on the latest ISIR transaction, Pell COA, Alternate Pell COA, nine-month EFC, and the student's FA Load value for each term. If you enter an amount for a Pell Grant, the Validation process may adjust it depending on the student's eligibility.

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Note: To award a Pell Grant amount calculated using ISIR data other than the latest ISIR, enter the amount in the Offered field. To ensure that your Pell processing information matches, go to the Packaging Status Summary page and click the PELL link to access the Pell Information page. On the Pell Information page, select the transaction number and effective date that matches the ISIR used to calculate the Pell Grant amount.

Accepted

This is the amount of the award the student accepts. If the action was *Offer/Accept,* this amount is automatically entered and matches the offered amount.

Note: You can decrease an award to an amount less than what has already been disbursed by manually entering an amount in the Accepted field that is less than the sum of the individual disbursed amounts for the award. The Packaging routine then determines a new set of scheduled disbursements based on the defined even split option or disbursement percentage associated with the award.

Disb Plan (disbursement plan)

Select a disbursement plan for the award. If the financial aid item type has a default disbursement plan defined at either the financial aid item type or the packaging plan level, that value is defaulted in this field.

Split Code

Select a split code. Only split codes associated with the selected disbursement plan are available. If the financial aid item type has a default split code defined at either the financial aid item type or the packaging plan level, that value is defaulted in this field.

Disbursement

This link appears after you validate an award. Click to access the Award Disbursement Detail page and view the terms, number of disbursement IDs, and amounts per disbursement ID as well as create custom split amounts and customize loan fee amounts.

Note: Before reinstating a previously canceled Pell Grant, you must change the custom split code from *XX* to the designated disbursement plan ID for the student. You can then click the Validation button to have the Pell Grant amount recalculated.

Message

This link appears if a message is generated by validation or Auto Packaging. Click to access the Packaging Message page and view the reason why a particular financial aid item type failed or was reduced by validation or Auto Packaging.

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Image: Packaging Message pagePackaging Message page

This example illustrates the fields and controls on the Packaging Message pagePackaging Message page.

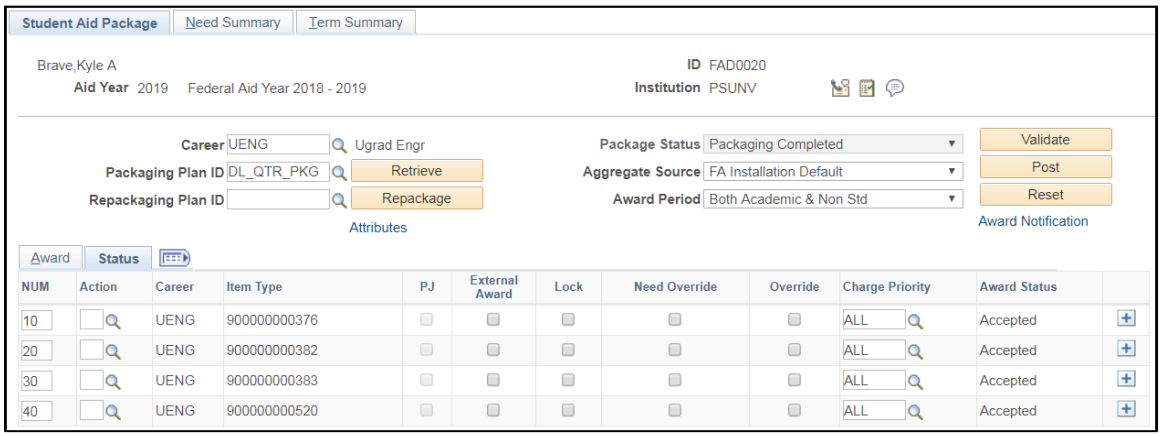
Note: If you select a disbursement for three terms but have valid Financial Aid Terms for only two of the terms, how the award is treated depends on whether you selected the Missing Term Enrollment - Split evenly across valid term option for the financial aid item type. If you selected this option, then the system splits the award equally among the valid terms. If you did not select this option, the system splits the award amount as follows. (Similar calculations would occur for a four-term disbursement where only two or three Financial Aid Terms were valid.) 1) The three terms would have disbursement splits of 20%, 40%, and 40%. The percentages associated with the valid terms are added together. For example, 20% + 40% = 60% 2) To calculate each valid term's award amount, the term disbursement split (20% or 40%) is divided by the percentage calculated in #1 to get the percentage which is applied to the award amount. For example, 20% divided by 60% = 0.3333 (33.33%) and 40% divided by 60% = 0.6667 (66.67%). The award amount multiplied by 0.3333 = first term award amount and award amount multiplied by 0.6667 = second term award amount. If you want an award split equally between the two valid Financial Aid Terms, select a two term disbursement plan.

Status Tab

Select the Status tab.

Image: Student Aid Package page: Status tab

This example illustrates the fields and controls on the Student Aid Package page: Status tab. You can find definitions for the fields and controls later on this page.



PJ (professional judgement) This check box is selected if an existing award was added or modified using professional judgement. This check box is display only. You can manually modify awards that have this

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check box selected; if you use Auto Packaging, the award is not modified.

See Using Professional Judgement.

Because professional judgement awards can be manually modified on this page, anyone with access to this page—not just those with access to the Professional Judgement page—can modify professional judgement awards. Members of your staff may not realize an existing award is a professional judgement award unless they check the Status page. For example, when reviewing a student's award package, a staff member sees that the student has an existing 10,000.00 USD award. The initial view of the Student Aid Package page does not indicate whether this award was made using professional judgement. To determine whether the award was made using professional judgement, the staff member should click the Status tab to see if the PJ check box is selected before modifying the award. You may want to address this issue during staff training, and advise your staff members to proceed cautiously.

EA (external award)

Set automatically when the External Award Load process successfully posts an external award. EA attribute is also set if an existing award is update from an external award loan transaction. For example, the External Award Load processing updating the disbursed amounts for an existing work-study award. When the EA attribute is checked, the award is prevented from being overwritten by the Auto and Mass Packaging and Repackaging processes.

Lock

Select to prevent the award from being overwritten by the Auto Packaging or Mass Packaging process and to override the financial aid item type level award amount limits. Manually locking an award does not allow you to override the fiscal, aggregate, and equity limits, and any federal or legal rules or limits. You can also set a global lock at the financial aid item type level. Doing this always sets the award to locked when performing Manual, Auto, or Mass Packaging. An example of an award you might want to lock is an award from a private source that should not be altered by another Packaging process.

Need Override

Select to prevent the system from changing the award amount when the student's need changes. The check box is available only for awards associated with the active career. When this check box is selected, only fiscal limits and aggregate rules are applied during validation. When this check box is selected, you do not need to select the Lock or Override check boxes because their functionality is effectively included when you select Need Override.

Override

Select to allow the award amount to exceed the award amount limits defined for this financial aid item type. The override does

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	not allow award amounts to exceed legal limits, available fiscal funds, or aggregate limits.
Charge Priority	Select the type of charge you want this award to pay. The list contains the charge priority lists set up at your institution. If your institution has defined a charge priority list for the financial aid item type, it defaults in this field. See "Defining Charge Priority List Rules" (PeopleSoft Campus Solutions 9.2: Student Financials).
Award Status	The current status of the award. The award status can be *Offered, Accepted, Canceled,* or *Declined.*
Adjustment Reason	If you adjust an award action, this link appears immediately after the Award Status field. Click to access the Award Adjustment page and enter the reason for the adjustment.

Warning! If you repackage locked and/or disbursed awards using Auto Packaging, we recommend that you post that set of awards *first* (click the Post button) *before performing any manual modification activity* requiring you to click the Validation button. In other words, if the student has a set of locked or disbursed awards, and you repackage that student using Auto Packaging, click the Post button first. Do not click the Validate button immediately upon returning from Auto Packaging, or manually change the set of awards that was returned from Auto Packaging and click the Validate button. If you click the Validate button *before posting* a set of awards that was returned from Auto Packaging, it can potentially compromise that synchronization between offer and accept amounts as well as produce a different award than anticipated.

Note: If the student *does not* have a set of locked or disbursed awards, and you repackage that student using Auto Packaging, you can manually change that set of awards and click the Validate button immediately after Auto Packaging without needing to post that set of Auto Packaged awards first.

Related Links

Defining Default Disbursement Plans and Split Codes

Processing Awards for Multiple Award Periods Employing Passive/Active Mode

Viewing Award Disbursement Detail

Access the Award Disbursement Detail page (click the Disbursement link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page).

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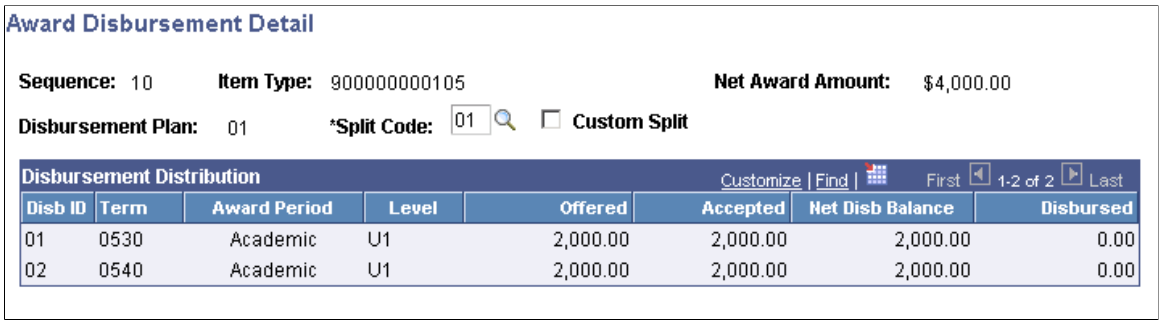
Image: Award Disbursement Detail page

This example illustrates the fields and controls on the Award Disbursement Detail page. You can find definitions for the fields and controls later on this page.



Sequence The sequence number of this award.

Item Type The financial aid item type of this award.

Net Award Amount The award amount minus any fees, such as loan fees.

Disbursement Plan The disbursement plan selected for the award.

Split Code The split code selected for the award. If the Custom Split check box is selected, or if this is an award that originated as multiple entries with the same disbursement plan but different split codes, or if this is a Pell Grant generated by a default Pell award rule of *FA Enrollment, FA Load,* or *FA Enrollment,* this field displays *XX* to indicate that a custom split is being used.

Custom Split Select to manually define a disbursement split rather than use a predefined split code. Then manually enter the offered amounts for each term. The dollar amounts for each term cannot exceed the total amount of the award. Validation must be run after any custom split codes are entered so loan fees can be recalculated and redistributed.

Custom Loan Fee This check box appears if the award financial aid item type is defined as a loan and the award has been accepted. Select the check box to make the Offer Loan Fee and Net Disb Balance (net disbursement balance) fields available. Enter the custom loan fee amounts in the Offer Loan Fee field for each term. The Net Disb Balance changes based on the amount you enter in the Loan Fee field.

When a custom loan fee is entered, it is preserved unless the loan award amount changes. You do not need to use the Lock or Override check boxes to ensure that the custom loan fees are preserved.

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Note: If the offer amount or accept amount of a loan is changed on an award entry page, the accept loan fee amounts are reset to the default loan fee amounts by the Packaging routine. After validating the new loan amounts, reenter the custom loan fee amounts if you want to have custom loan fees for the new loan amount.

Loan processing can also update an award's loan fee amount as a custom loan fee if the loan fee returned by the Lender or trading partner is different from the established fee for the loan. If loan processing changes the loan fee amount, the Custom Loan Fee check box is selected but is not available.

See Reviewing CL 4 Status and Phase Codes.

The following fields are displayed in the Disbursement Distribution group box. Some fields are available for editing as noted.

Disb ID (disbursement ID)	Identifies each separate disbursement for the award.
Term	The term in which the disbursement ID is disbursed.
Award Period	The award period, academic or nonstandard, of the term.
Aggr Lvl (aggregate level)	The student's aggregate level for the disbursement ID.
Offered	The amount of the total offered amount scheduled for this disbursement ID.
Accepted	The amount of the total accepted amount scheduled for this disbursement ID.
Offer Loan Fee	The portion of the total loan fee, based on the total offered amount, assigned to this disbursement ID. This field appears only for loan financial aid item types and becomes available when you select the Custom Loan Fee check box.
Offer Rebate	The portion of the Direct Lending loan interest rebate for the offered amount assigned to this disbursement ID. This field appears only for Direct Loan financial aid item types.
Accept Loan Fee	The portion of the total loan fee, based on the total accepted amount, assigned to this disbursement ID. This field appears only for loan financial aid item types.
Accept Rebate	The portion of the Direct Lending loan interest rebate for the accepted amount assigned to this disbursement ID. This field appears only for loan financial aid item types.
Net Disb Balance (net disbursement balance)	The accepted amount for the disbursement ID plus the accept rebate amount minus the accept loan fee for the disbursement ID. If no loan fees or interest rebates exist, the net disbursement

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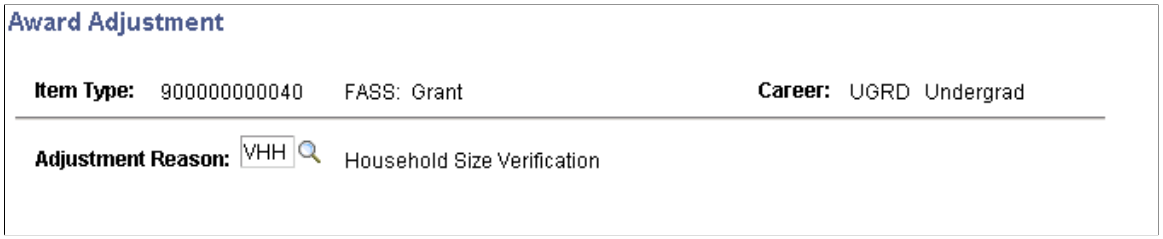
	balance is the same as the accepted amount. This field becomes available when you select the Custom Loan Fee check box.
Disbursed	The amount disbursed to the student for this disbursement ID.

Documenting Award Adjustments

Access the Award Adjustment page (click the Reason link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page).

Image: Award Adjustment page

This example illustrates the fields and controls on the Award Adjustment page. You can find definitions for the fields and controls later on this page.



You can use award adjustment reasons for reporting and statistical purposes. You define the award adjustment reasons during setup.

Adjustment Reason	Select the appropriate reason from the list of reasons you created on the Award Adjustment Reasons page.
Loan Reason	This field appears only if you are adjusting a loan. Enter a value in this field only if you are adjusting a previously certified loan. Select a loan reason to explain the reason for the adjustment. Loan reasons are intended for use with CommonLine post-guarantee adjustment processing, but the field is currently for informational purposes only. *Canceled:* The previously guaranteed loan was canceled. *Change:* Indicates a change in the student's information as the reason for adjusting the loan. *OverAward:* Indicates a change in the loan to prevent an overaward. *Re-Issue:* A request to the lender to reissue a loan that was previously reported canceled. *Withdrawal:* Indicates the change to the student's loan amount is due to the student's withdrawal from the institution.

Related Links

Setting Up Award Messages

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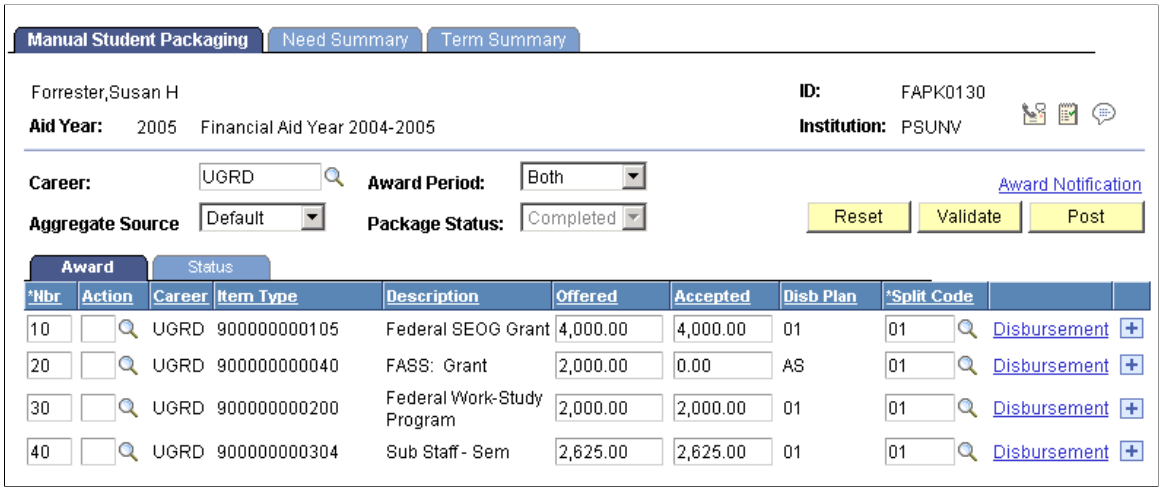
Awarding Students Manually

Access the Manual Student Packaging page (Financial Aid > Awards > Award Processing > Assign Departmental Awards > Manual Student Packaging).

Image: Manual Student Packaging page

This example illustrates the fields and controls on the Manual Student Packaging page. You can find definitions for the fields and controls later on this page.



This page is identical to the Student Aid Package page except the Auto Packaging functionality is not available.

Other departments on campus can use this page to enter students' departmental awards, such as academic or athletic scholarships. Using item type security, you can limit the choice of financial aid item types available for selection on the page.

Related Links

Using Auto Packaging and Auto Select Packaging

Using Professional Judgement

Access the Professional Judgement page (Financial Aid > Awards > Award Processing > Invoke Professional Judgement > Professional Judgement).

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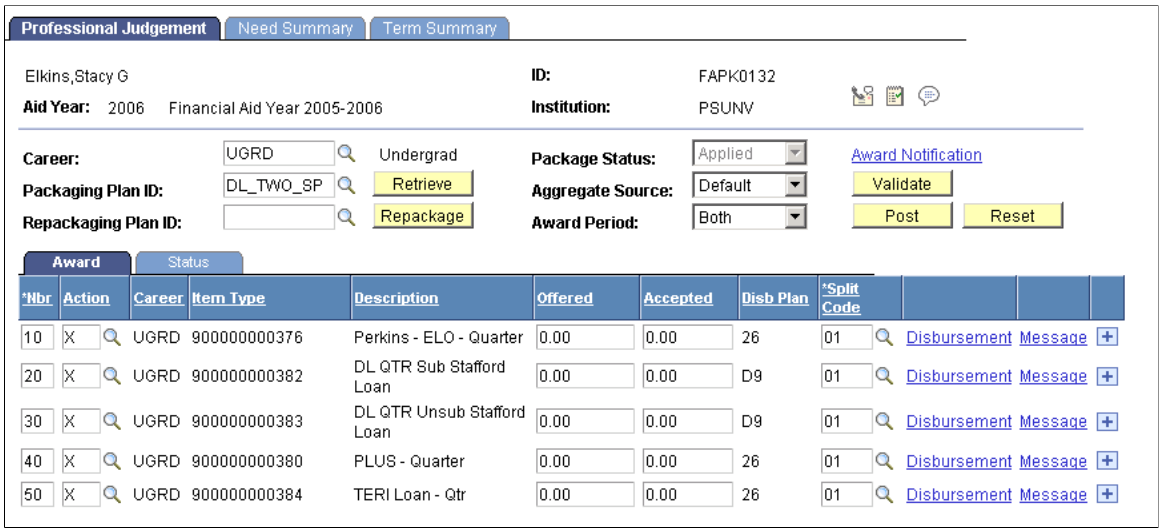
Image: Professional Judgement page: Award tab

This example illustrates the fields and controls on the Professional Judgement page: Award tab. You can find definitions for the fields and controls later on this page.



The fields on the Professional Judgement page correspond to those on the Student Aid Package page. Awards that you enter or adjust on this page have the PJ check box selected on the Student Aid Package and Manual Student Packaging page to indicate that the normal eligibility criteria and award limits were not applied to this award.

See Using Auto Packaging and Auto Select Packaging.

The Professional Judgement page enables you to override the Packaging routine's edits—financial aid item type rules, federal aggregates (annual and lifetime), federal eligibility rules—when awarding a student. This override applies to awards that have the following actions taken:

- An award is manually entered on the Professional Judgement page.
- An existing award is changed on the Professional Judgement page.
- A change is made to an Auto Package award on the Professional Judgement page.

Because this page can be used to bypass all federal eligibility and awarding rules, careful thought should be given when granting security for this page.

Awards that you enter or modify on this page cannot be modified on any award entry pages except the Professional Judgement page.

Award Tab

See the previous exhibit for this tab.

Select the Award tab.

When you use the Award tab on the Professional Judgement page to add a new manual award or to override the offered or accepted amount for an item type of an existing award, the system automatically selects the PJ check box on the Status tab on the Professional Judgement page.

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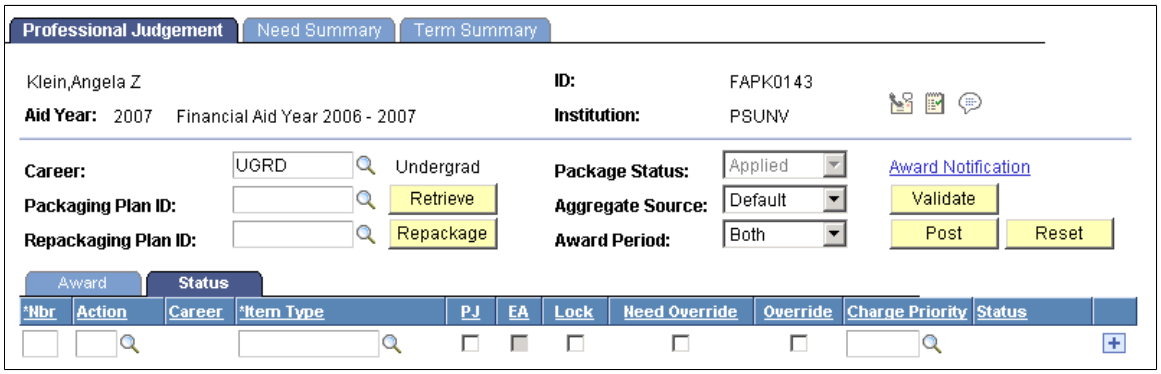
Status Tab

Select the Status tab.

Image: Professional Judgement page: Status tab

This example illustrates the fields and controls on the Professional Judgement page: Status tab. You can find definitions for the fields and controls later on this page.



When you add a new award manually or override an existing award, the system selects the corresponding check box in the PJ column for the adjusted item type. You can clear this check box.

Performing Mass Packaging Using Application Data

This section discusses how to:

- Run Mass Packaging selection.
- Review students selected for Mass Packaging.
- Assign packaging plans to students.
- Review packaging plans assigned by query.
- Review packaging plans assigned by packaging plan.
- Process Mass Packaging.

Pages Used to Perform Mass Packaging Using Federal Application Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Mass Packaging Select	RUNCTL_FA_BPKG	Financial Aid > Awards > Mass Packaging > Select Students > Mass Packaging Select	Run mass packaging selection, which selects the students that you defined on the Mass Packaging Select Students page. This is the first of the three processes for Mass Packaging.

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Page Name	Definition Name	Navigation	Usage
Mass Packaging by Students	FA_BPKG_STDLIST	Financial Aid > Awards > Mass Packaging > View Results by Students > Mass Packaging by Students	Review a list of the student selected using the Mass Packaging selection definition in the Mass Packaging Student Select process.
Mass Packaging Assign	RUNCTL_FA_BPKG_ASN	Financial Aid > Awards > Mass Packaging > Assign Plans > Mass Packaging Assign	Assign packaging plans by running the second step in Mass Packaging, associating a packaging plan (or series of packaging plans) with the students who have been selected for Mass Packaging.
Mass Packaging Plans Assigned	FA_BPKG_PLANQRY	Financial Aid > Awards > Mass Packaging > View Results by Query > Mass Packaging Plans Assigned	Review the packaging plans assigned to students, who are sorted by ID. You can also view students not assigned a packaging plan.
Mass Packaging Students by Plan	FA_BPKG_STDPLAN	Financial Aid > Awards > Mass Packaging > View Results by Plan > Mass Packaging Students by Plan	Review the packaging plans assigned to students sorted by the Sort Field field designated on the Mass Packaging Assign page. This page displays one packaging plan at a time.
Mass Packaging Process	RUNCTL_FA_BPKG_PRC	Financial Aid > Awards > Mass Packaging > Process Mass Packaging > Mass Packaging Process	Process mass packaging. Initiate the eligibility review and award calculation routine, which is the third and last step in the Mass Packaging process.

Running Mass Packaging Selection

Access the Mass Packaging Select page (Financial Aid > Mass Packaging > Awards > Select Students > Mass Packaging Select).

Selection of students is based on the Selection Tool criteria defined in the query, equation, or external file. No other assessment is used to filter students for the Mass Packaging process.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool (PS Query, Equation Engine, or external file) to identify IDs for a specific transaction, you must use it.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.2: Campus Community).

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Selection Tool Displays if Population Selection check box is selected. Select from: *Equation Engine, PS Query,* or *External File,* or enter a tool that your institution created to select the IDs to assign to the student group. Additional parameters are displayed for your selected tool.

Query Name Displays only when *PS Query* is selected in the Selection Tool field. Select a PS Query that uses one of these bind records:

- Use SFA_BPKGX_BIND if your criteria is not career-dependent.
- Use SFA_BPKG_BIND if Career is a criteria element.

Equation Displays only when *Equation Engine* is selected in the Selection Tool field. Select an equation that is defined with the application prompt Mass Packaging Selection.

Parameters

Institution and **Aid Year** Enter the institution and aid year for which to run Mass Packaging.

Reviewing Students Selected for Mass Packaging

Access the Mass Packaging by Students page (Financial Aid > Awards > Mass Packaging > View Results by Students > Mass Packaging by Students).

Process Status Indicates whether the student is packaged with this batch of students in the next two steps of Mass Packaging.

Invalid: The student is not included in this Mass Packaging run.

Valid: The student is processed during this Mass Packaging run.

You can delete the student's row or change the Process Status to *Invalid* to remove any students you do not want to be included in this packaging batch. If students have multiple careers, a row exists for each career for which they are packaged.

Assigning Packaging Plans to Students

Access the Mass Packaging Assign page (Financial Aid > Awards > Mass Packaging > Assign Plans > Mass Packaging Assign).

Select the Mass Packaging Selection Definition that you are using to select your students for the current Mass Packaging run.

In the Packaging Plan Parameters group box, select one or more packaging plans the system should apply against the current group of students selected for Mass Packaging.

Career The career you select here determines the packaging plans available in the Plan ID field.

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Plan ID

The ID of the packaging plan to apply to eligible students in this Mass Packaging run. Only packaging plans associated with the selected career are available. It does not matter in what order you list the plan IDs on this page. If you list multiple packaging plans, the packaging plans are applied against the selected students based on the processing order defined for each packaging plan in the packaging plan setup. You can review the students and the packaging plans that have been associated with them after you run the process.

Sort Field

Select a field on which to sort students within each plan. You must then choose to sort the students in either ascending or descending order. For example, you could sort students based on ascending EFC or descending federal need. The third step of the Mass Packaging process evaluates students in the order in which they are sorted. The fields by which you can sort students are:

- *ADJ_PAR_CONTRIB* (Adjusted Parent Contribution)
- *AGI_PAR* (Parents' Adjusted Gross Income)
- *AGI_STU* (Students' Adjusted Gross Income)
- *EMPLID* (Employee ID)
- *FED_EFC* (Federal Effective Family Contribution)
- *FED_NEED* (Federal Need)
- *FED_PARENT_CONTRB* (Federal Parent Contribution)
- *FED_STDNT_CONTRB* (Federal Student Contribution)
- *INST_EFC* (Institutional Effective Family Contribution)
- I*NST_PARENT_CONTRB* (Institutional Parent Contribution)
- *INST_STDNT_CONTRB* (Institutional Student Contribution)
- *PRORATED_EFC* (Prorated Effective Family Contribution)
- *TRANS_PROCESS_DT* (Transaction Process Date)

Do not use FED_EFC for packaging plans that have a non-standard award period. FED_EFC represents the PRIMARY _EFC, which is the 9–month EFC that is synonymous with the academic award period. Therefore, all non-standard award period FED_EFC values equal 0.00. If you sort by FED_EFC for non-standard plans, the system defaults the sort order to EMPLID.

Asc (ascending)

Select this option to have the students sorted in ascending order.

Desc (descending)

Select this option to have the students sorted in descending order.

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Run	Run the Mass Packaging Plan Assignment process (FAPPKASN) when you are ready to assign packaging plans.

Reviewing Packaging Plans Assigned by Query

Access the Mass Packaging Plans Assigned page (Financial Aid > Awards > Mass Packaging > View Results by Query > Mass Packaging Plans Assigned).

To identify each packaging plan, the page displays three fields from the Mass Packaging Assign page —Packaging Plan ID, Academic Career, and Sort Packaging by— and the Plan Order from the packaging plan setup. The plan order is the processing order for the packaging plan. Use the scroll arrows to view the other packaging plan IDs used for this Mass Packaging session.

For each packaging plan, the page displays the students selected for the packaging plan in ascending ID order. The list provides the student's ID, name, and value for the field identified in the Sort Packaging by field (the name of the third column changes to match this field). Click Remove to remove a student from the list and prevent the student from being packaged during the final step of the Mass Packaging process.

Reviewing Packaging Plans Assigned by Packaging Plan

Access the Mass Packaging Students by Plan page (Financial Aid > Awards > Mass Packaging > View Results by Plan > Mass Packaging Students by Plan).

To identify each packaging plan, the page displays three fields from the Mass Packaging Assign page —Packaging Plan ID, Academic Career, and Sort Packaging by—and the Plan Order from the packaging plan setup. The plan order is the processing order for the packaging plan.

For each packaging plan, the page displays the students selected for the packaging plan, sorted by the field identified in the Sort Packaging by field. The list provides the student's ID, name, and value for the field identified in the Sort Packaging by field (the name of the third column changes to match this field). Click Remove to remove a student from the list and prevent the student from being packaged during the final step of the Mass Packaging process.

You can view students who were not assigned a packaging plan by selecting a career but no packaging plan when you open the page.

Processing Mass Packaging

Access the Mass Packaging Process page (Financial Aid > Awards > Mass Packaging > Process Mass Packaging > Mass Packaging Process).

Selection Definition	Select the name of the student group defined on the Mass Packaging Select page.
Methodology	Select which need analysis methodology to use: *Federal*, *Institutional*, or *Both*. This is an optional field where Federal is the default value. It is an information-only field that allows users to define with which Methodology the batch was packaged.

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Live

Select this mode to run the process and commit the awards to the database. This includes tables such as student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log.

Note: Oracle recommends that you run in Simulation mode at least once before running in Live mode.

Simulation

Select this mode to simulate and view results. You can then refine your repackaging plan rules and rerun Batch Repackaging Simulation to produce the desired award amounts. When you are satisfied with the Simulation results, rerun Batch Repackaging in Live mode.

Select Simulation or Live as the mode for which you want to run this Mass Packaging. If you select Simulation, you can review the results before deciding to update all award tables. If you select Live, the process updates all award-related tables.

Note: It is highly recommended that you run the Mass Packaging process in Simulation mode at least once before running it in Live mode.

A student can receive one, none, all, or some of the awards defined in the packaging plan assigned to them. The system applies your financial aid item type rules, federal eligibility rules, fiscal limits, and aggregate aid rules to determine whether the student receives a particular award as part of their package. The Mass Packaging process also determines award amounts, disbursement plans, and split codes for each award.

When you run the third step of the Mass Packaging process in Live mode, the process updates various tables including student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log. If the Mass Packaging process encounters an error, the Posting process provides a message regarding the reason the student was not packaged and the student is displayed on the Mass Packaging Errors page. The Mass Packaging process continues packaging students and writing errors to the Mass Packaging Errors page until it reaches the number of errors allowed by the Background Errors Allowed field on the Financial Aid Defaults page. When the allowed errors limit is reached, the Mass Packaging process stops.

Note: Students whose award record encounters posting errors during Mass Packaging Live mode appear on the Mass Packaging Details component (Financial Aid > Awards > Mass Packaging) as well as the Mass Packaging Errors page. However, these students have not actually been packaged. The Mass Packaging Details pages displays the awards the student would have received if there were no posting errors.

Run the Mass Packaging process (FAPPKBKG) when you are ready to package students.

Reviewing Mass Packaging Results

You can use these pages to view detailed information regarding the student's financial aid eligibility, need information, and specific award information. You can also view a list of students who were not packaged because they did not meet the selection criteria for any of the packaging plans used in the Mass Packaging process.

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This section discusses how to:

- Review Mass Packaging summary information.
- Review student eligibility and need information.
- Review student award information.
- Review Mass Packaging errors.

Pages Used to Review Mass Packaging Results

Page Name	*Definition Name*	*Navigation*	*Usage*
Mass Packaging Summary	PKG_BATCH_SUMM	Financial Aid > Awards > Mass Packaging > View Mass Packaging Summary > Mass Packaging Summary	Review the number of students selected for each packaging plan and those students packaged by the Mass Packaging process.
Eligibility/Need	PKG_BATCH_STDNT	Financial Aid > Awards > Mass Packaging > View Mass Packaging Details > Eligibility/Need	Review a student's financial aid eligibility and need information based on the results of the packaging plan. This page displays information for a single packaging plan.
Awards Detail	PKG_BATCH_AWD	Financial Aid > Awards > Mass Packaging > View Mass Packaging Details > Awards Detail	Review detailed information about the awards that were packaged for a student as a result of the Mass Packaging process.
Mass Packaging Award Message	PKG_BATCH_MSG_SEC	Click the Message link on the Awards Detail page.	View the reason why the student did not receive this award.
Mass Packaging Disbursement	PKG_BATCH_DISB_SEC	Click the Disbursement link on the Awards Detail page.	View scheduled disbursement detail for an award.
Mass Packaging Errors	PKG_BATCH_ERR	Financial Aid > Awards > Mass Packaging > View Mass Packaging Errors > Mass Packaging Errors	Review students who were not packaged by any packaging plan and an explanation of why they were not packaged.
Mass Packaging Error Detail	PKG_BATCH_ERR_SEC	Click the Detail link on the Mass Packaging Errors page.	View the error message associated with the error code displayed on the Mass Packaging Errors page.

Reviewing Mass Packaging Summary Information

Access the Mass Packaging Summary page (Financial Aid > Awards > Mass Packaging > View Mass Packaging Details > Mass Packaging Summary).

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Batch Number	The number assigned to the batch of students when you run the Mass Packaging process.
Batch Date Time	The date and time you ran the Mass Packaging process or Institutional Mass Packaging process for this batch of students.
Live vs. Simulation	Indicates whether you ran the Mass Packaging process in live or simulation mode. *Live:* The Mass Packaging process updated all award-related tables. *Simulation:* You can review the results of the Mass Packaging process, but award-related tables were not updated.
Methodology	Displays which need analysis methodology was specified during the mass packaging run: *Federal*, *Institutional*, or *Both*.
Packaging Plan ID	Identifies the packaging plan used in the Mass Packaging run.
Total Selected	The total number of students assigned this packaging plan.
Total Packaged	The total number of students who were successfully packaged using this packaging plan.
Total Not Packaged	The total number of students who were assigned this packaging plan but did not receive any awards because of one or more errors.

Reviewing Student Eligibility and Need Information

Access the Eligibility/Need page (Financial Aid > Awards > Mass Packaging > View Mass Packaging Details > Eligibility/Need).

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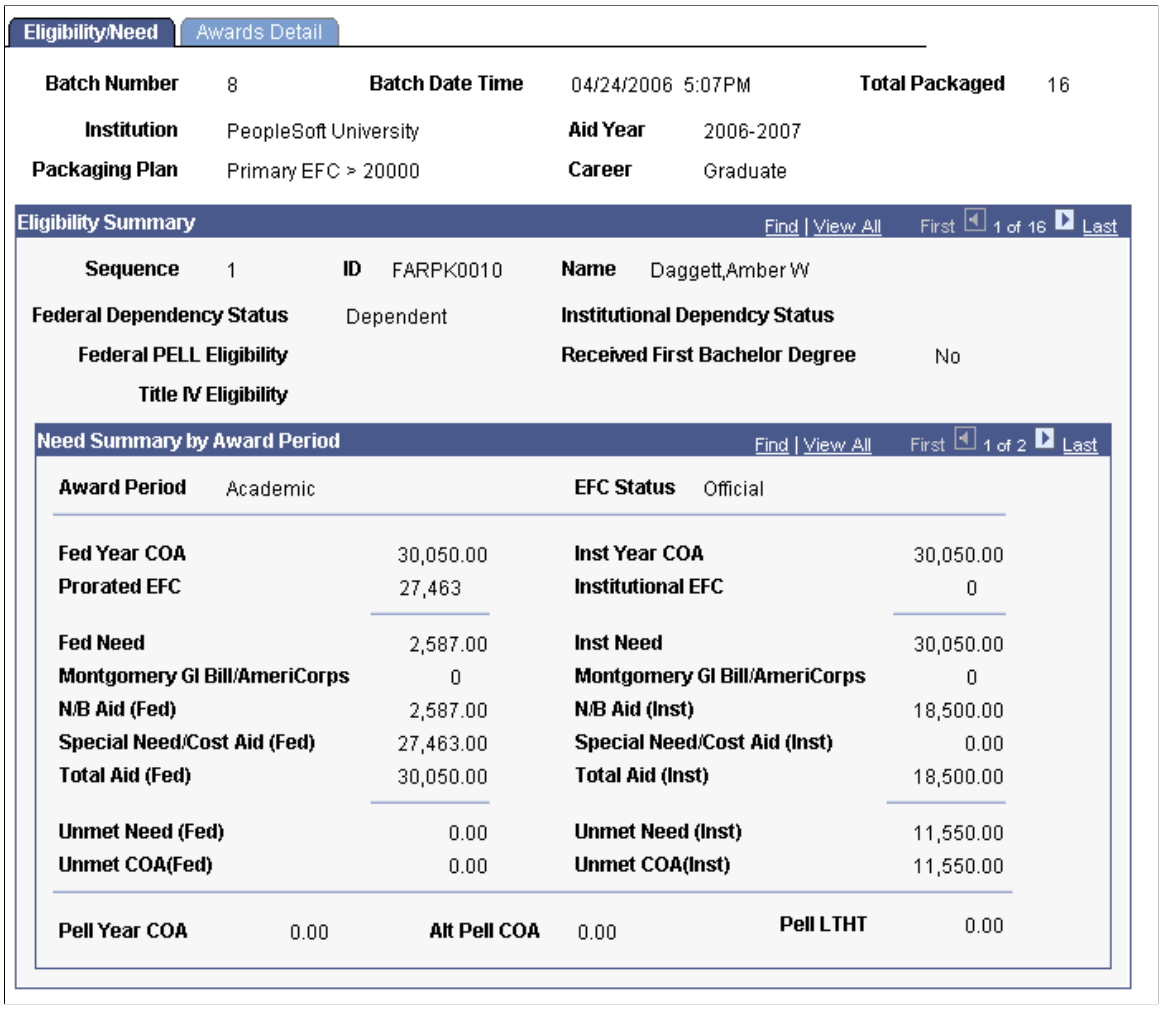
Image: Eligibility/Need page

This example illustrates the fields and controls on the Eligibility/Need page. You can find definitions for the fields and controls later on this page.



This page displays information for a single packaging plan. To see other students packaged using the selected packaging plan, use the top set of scroll arrows. Use the bottom set of scroll arrows to view the information for each student by award period.

Sequence	The sequence number indicates the order in which students were packaged during Mass Packaging.
Federal Dependency Status	Indicates whether the student is dependent or independent under federal methodology.
Institutional Dependency Status	Indicates whether the student is dependent or independent under institutional methodology.
Federal PELL Eligibility	Indicates whether the student is eligible to receive a Pell Grant.
Received First Bachelor Degree	Indicates whether the student has already received his or her first bachelor's degree.

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Title IV Eligibility	Indicates whether the student is eligible to receive federal Title IV aid.

Related Links

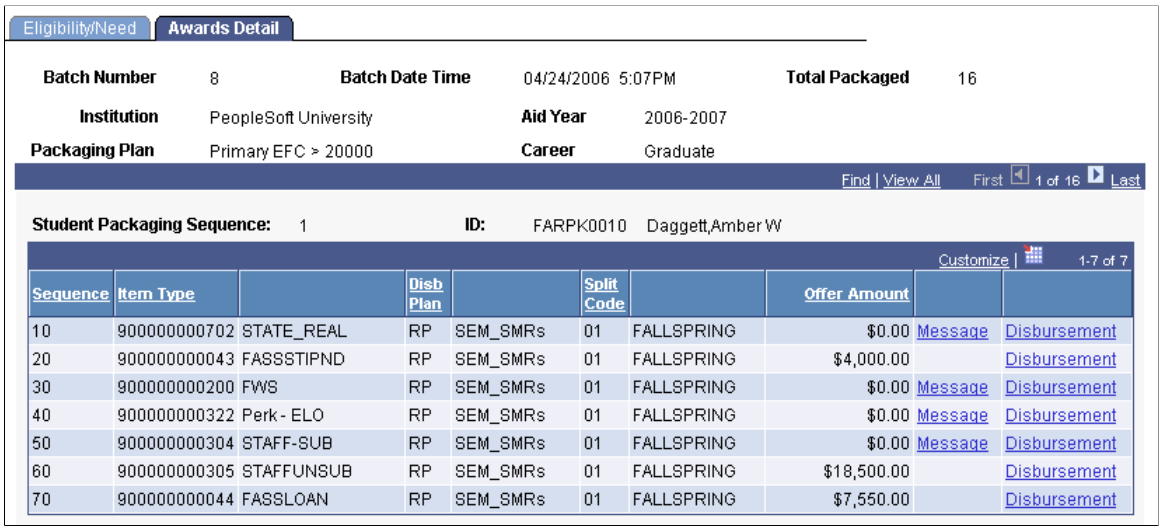
Viewing Need Summary Information

Reviewing Student Award Information

Access the Awards Detail page (Financial Aid > Awards > Mass Packaging > View Mass Packaging Details > Awards Detail).

Image: Awards Detail page

This example illustrates the fields and controls on the Awards Detail page. You can find definitions for the fields and controls later on this page.



Eligibility/Need | Awards Detail

Batch Number 8 Batch Date Time 04/24/2006 5:07PM Total Packaged 16

Institution PeopleSoft University Aid Year 2006-2007

Packaging Plan Primary EFC > 20000 Career Graduate

Find | View All First 1 of 16 Last

Student Packaging Sequence: 1 ID: FARPK0010 Daggett,Amber W

Customize | 1-7 of 7

Sequence	Item Type		Disb Plan		Split Code		Offer Amount		
10	900000000702	STATE_REAL	RP	SEM_SMRs	01	FALLSPRING	$0.00	Message	Disbursement
20	900000000043	FASSSTIPND	RP	SEM_SMRs	01	FALLSPRING	$4,000.00		Disbursement
30	900000000200	FWS	RP	SEM_SMRs	01	FALLSPRING	$0.00	Message	Disbursement
40	900000000322	Perk - ELO	RP	SEM_SMRs	01	FALLSPRING	$0.00	Message	Disbursement
50	900000000304	STAFF-SUB	RP	SEM_SMRs	01	FALLSPRING	$0.00	Message	Disbursement
60	900000000305	STAFFUNSUB	RP	SEM_SMRs	01	FALLSPRING	$18,500.00		Disbursement
70	900000000044	FASSLOAN	RP	SEM_SMRs	01	FALLSPRING	$7,550.00		Disbursement

All awards in the packaging plan are displayed for each student. The page displays zero and nonzero awards—nonzero awards display the scheduled disbursements.

Student Packaging Sequence	The sequence number indicates the order in which students were packaged during Mass Packaging.
Sequence	The sequence number automatically assigned in increments of ten when awards are entered.
Item Type	The financial aid item type of the student's award.
Disbursement Plan	The disbursement plan assigned to the student's award.
Split Code	The split code of the student's award, which indicates how the award is split for disbursement to the student.
Offer Amount	If the Offer Amount for an award is 0.00, then the student was not eligible for that particular award or it was an unlocked, preexisting award which was set to 0.00 by Mass Packaging.

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	The awards with a zero Offer Amount are no longer visible after the student's award package is posted.
Message	Click to access the Mass Packaging Award Message page and view the reason why the student did not receive this award.
Disbursement	Click to access the Mass Packaging Disbursement page and view scheduled disbursement detail for an award.

Reviewing Mass Packaging Errors

Access the Mass Packaging Errors page (Financial Aid > Awards > Mass Packaging > View Mass Packaging Errors > Mass Packaging Errors).

Only students who had serious errors (such as students who had their Financial Aid Term deleted) during the actual Mass Packaging run are in this list. Generally, no students should be listed on this page. If students are listed, look beyond the packaging plan for the reasons for the error.

Batch # (batch number)	The batch number identifies the particular Mass Packaging session.
Batch Date Time	The date and time the Mass Packaging session was run.
Total Not Pkgd (total not packaged)	The total number of students who were assigned to the packaging plan but were not packaged due to an error.
Pkg Plan (packaging plan)	The packaging plan with which the system tried to package the listed students.
Error Sequence	Key by which the error data is sorted.
ID	The ID of the student who was not packaged.
Error	The message number that identifies the error that prevented the student from being packaged.
Detail	Click to access the Mass Packaging Error Detail page and view the error message associated with the displayed error code.

Mass Packaging Error Messages

The following table lists and explains possible Mass Packaging posting error messages:

Message Number	*Message Text*	*Message Explanation*
108	The Disbursement ID Table entries have no terms associated with them.	The disbursement plan's Disbursement ID Table either has no entries or the entries do not have terms specified. Enter Disbursement ID table entries or update the existing entries with valid terms.

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Message Number	*Message Text*	*Message Explanation*
111	There is no Student Award Period record for the awarded period.	The student does not have a Student Award Period record for the period being awarded.
112	The maximum number of Term records is exceeded.	The limit to the number of Term records that can be associated with an award period is exceeded by this disbursement plan. Either reduce the number of terms or contact your technical resource to increase the maximum number of term records permitted in an award period.
113	The maximum number of Student Award Period records is exceeded.	The limit to the number of Student Award Period records that can be associated with a student for the award period is exceeded by this student. Either eliminate some of the Student Award Period records or contact your technical resource to increase the maximum number of Student Award Period records permitted.
114	There is no Set ID for this Institution's item types.	The institution does not have an "Item Type" Set ID in the Set Control Group Table. The Set ID is used to determine which group of item types is valid for this institution. Determine the correct Set ID for this institution's item types and create an Item Type record in the Set Control Group Table for this institution.
115	The Item Type is Invalid.	The transaction's financial aid item type is not valid.
132	The Transaction has a custom split code but no Award Disbursements.	The transaction has a custom split code of 'XX' which requires award disbursement records to be associated with the transaction, but there are none. Either supply the missing disbursement records or specify an existing disbursement plan.
140	The existing Student Award has no disbursement records.	The existing Student Award has no disbursement records. All Student Awards are required to have disbursement records. Contact technical support and report this error.

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Message Number	*Message Text*	*Message Explanation*
141	The existing Student Award's Disbursement Records maximum is exceeded.	The existing Student Award has more Disbursement Records than are supported by the FAPAWPST program. The FAPAWPST program can be modified to support more Distribution Records; this transaction cannot post until the program is modified.
152	No CPS school code for this Institution.	There is no CPS school code specified for this transaction's Institution, Aid Year, Academic Career combination. Either the combination is invalid or the CPS school code needs to be added to the database for this Institution, Aid Year, Academic Career combination.
155	No Student Aid Attribute Record was found for this transaction.	No Student Aid Attribute Record was found for this transaction.
156	No Award Summary Information was found for this transaction.	No Award Summary Information was found for this transaction.
158	An error was encountered when processing aggregates for this student.	An error was encountered when processing aggregates for this student.
159	No Student Award information was found for this student.	No Student Award Information was found for this student.
160	No Student Award Summary was found for this transaction.	No Student Award Summary was found for this transaction.
161	No Disbursement Information was found for this transaction.	No Disbursement Information was found for this transaction.
162	No Disbursement Summary information was found for this transaction.	No Disbursement Summary information was found for this transaction.
163	Disbursement ID was not found in Disbursement Plan for this transaction.	Disbursement ID was not found in disbursement plan for this transaction.
165	Maximum number of Disbursement Plans was exceeded.	Maximum number of disbursement plans was exceeded.
166	Term not found in Disbursement Plan for this transaction.	Term not found in disbursement plan for this transaction.
9328 (Generic Message)	Student failed the batch Posting process. The Awards were not posted.	Student failed the batch Posting process. The Awards were not posted.

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Message Number	*Message Text*	*Message Explanation*
9330	Student failed Batch Posting. Awards not posted. Multiple Disb Plans for Non-Canceled Item Type.	Student's package contains multiple instances of the same financial aid item type that have not been canceled where the disbursement plans are different.
9331	Student failed Batch Posting. Awards not posted. Multiple Disb Plans - Loan in transit.	Student's package contains multiple instances of the same loan financial aid item type in transit that have not been canceled where the disbursement plans are different.
9332	Student failed Batch Posting. Awards not posted. Multiple Disb Plans - Loan was originated.	Student's package contains multiple instances of the same loan financial aid item type (at least one originated) that have not been canceled where the disbursement plans are different.
9333	Failed Batch Posting. Awards not posted. Multiple Disb Plans - Auth/Disb balances greater than 0.	Student's package contains multiple instances of the same financial aid item type that have not been canceled where the disbursement plans are different. Authorization/disbursement has occurred and the authorization/disbursement amount is greater than zero.
9334	Student failed Batch Posting. Awards not posted. Offer available is negative (Item Type Fiscal).	Award offer amount can never be negative on the Assign Fiscal Limits page.
9335	Student failed Batch Posting. Awards not posted. Accept available is negative (Item Type Fiscal).	Award accept amount can never be negative on the Assign Fiscal Limits page.
9336	Failed Batch Posting. Awards not posted. Multiple Aggregate Levels for same Career & Item Type.	Student cannot have multiple aggregate levels for the same financial aid item type and same career
9337	Student failed Batch Posting. Awards not posted. Unable to update Award Aggregates data.	Error detected while trying to update aggregate information for this student. Batch Posting process failed; award not posted.

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