Preparing for Awarding and Packaging

Making Early Financial Aid Offers

Your institution may use early financial aid offers as part of your admission recruitment process. Early financial aid offers are associated with a career. Because a student can apply for more than one career, this feature enables you to assign an early financial aid offer for each career's admission application the student may submit. Early financial aid offers must have an effective date so that the history of early financial aid offers can be tracked.

The early financial aid offer enables you to award estimated aid to students based on early financial aid categories you define. Select as many of these categories as you want. For each category, you enter an estimated amount of aid, and whether the award category should be offered, accepted, canceled, or declined.

This section lists prerequisites and discusses how to:

- Create early financial aid offers.
- View admissions application information.

Prerequisites

Before you create early financial aid offers using award categories, you must set up early financial aid offer categories.

Related Links

Preparing for Early Financial Aid Offers

Pages Used to Make Early Financial Aid Offers

Page Name	*Definition Name*	*Navigation*	*Usage*
Early Financial Aid Offer	ERLY_FA_OFFER	Financial Aid > Awards > Early Financial Aid Awards > Offer Early Financial Aid > Early Financial Aid Offer	Create or modify early financial aid offers.
Admission Application Detail	FA_APPL_SEC	Click the Detail link on the Early Financial Aid Offer page.	View admissions application information for the student.

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Creating Early Financial Aid Offers

Access the Early Financial Aid Offer page (Financial Aid > Awards > Early Financial Aid Awards > Offer Early Financial Aid > Early Financial Aid Offer).

Image: Early Financial Aid Offer page

This example illustrates the fields and controls on the Early Financial Aid Offer page. You can find definitions for the fields and controls later on this page.

Warning! It is strongly advised that the financial aid office work closely with the admissions office regarding the use of early financial aid offers. Early financial aid offers do not require a student to be checked for eligibility for financial aid awards. If a student is offered an early financial aid offer but later is found to be ineligible for aid or for the amount of aid offered, your institution could be held liable for the student's funding.
A student can have multiple admissions applications for multiple programs that may be in multiple careers. The Career Nbr (career number), Program Nbr (program number), and Application Nbr (application number) fields display sequential numbers for multiple admissions applications.

Detail	Click to access the Admission Application Detail page and review the status of the student's admissions application.
Sequence	Enables you to have up to ten early award offers for each day, working in conjunction with the effective date. The system increases the sequence automatically, or you can enter a particular sequence number.
Aid Year	Populates automatically based on the aid year selected in the user default settings. To change the aid year, use correction mode.
Offer Total	The total amount of early financial aid that you have awarded to the student.

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Aid Category	Select the appropriate aid category for the type of aid that you are offering the student. The categories you set up on the Early Aid Categories page are available in this field. See Preparing for Early Financial Aid Offers.
Status	The current action being taken on the aid category. *Accepted:* The student has accepted the offered aid category. *Canceled:* You have canceled the offered aid category. *Declined:* The student has declined the offered aid category. *Offered:* The aid category has been offered to the student, but no response has been received from the student yet.
Offer Amount	The amount for the aid category that you want to offer the student.

Viewing Admission Application Information

Access the Admission Application Detail page (click the Detail link on the Early Financial Aid Offer page).

Complete and **Completed Date**	Indicates whether the student's admissions application is complete and the date that the application was completed.
Evaluation Status and **Evaluation Date**	The evaluation status of the student's admissions application and the date associated with this status. *Complete:* The evaluation is complete. *In Progress:* The evaluation is in progress.

Application Detail

The Application Detail group box displays academic program data from the student's admissions application.

Effective Sequence	Distinguishes individual rows entered with the same effective date. This feature enables you to have admissions applications for each academic program for which the student applies. The system increases the sequence automatically, or you can enter a particular sequence number.
Status	The admissions status for the student in the specified academic program.
Program Action	Indicates the current action being taken in the admissions process.

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Admit Term	The term in which the student was admitted to the academic program.
Action Reason and **Action Date**	The reason that and date on which the action was taken.

Selecting Your Application Data Source for Awarding

Specify whether you want to use federal application data (ISIR), institutional application data (PROFILE or an institutional application), or either (indicating which you would prefer to use if both are available). The application data source you select affects the packaging outcomes of Mass Packaging, Auto Packaging, and online manual awarding.

To allow the awarding and packaging of financial aid by using federal application data or institutional application data, you must enter a value in the Packaging Data Source field on the Financial Aid Defaults page, or override the installation level default for this field using an aid processing rule set at the academic career or academic program level. Select whether you want to use federal data, institutional data, or use a preference for federal or institutional data. For example, you could select the *Institutional then Federal* value for the packaging data source. If institutional application data is not available, the Packaging routine uses the student's federal application data to award monies.

The Packaging routine and the Equation Engine are affected by your selection of application data, either federal or institutional. The Packaging routine includes manual awarding, Auto Packaging, Mass Packaging, and the Mass Actions page. If you select an application type in the Packaging Data Source field that is different from the type of application that exists for a student, you cannot make awards for that student or adjust that student's awards. For example, if you select institutional application data as your packaging data source and the student has only federal application data, you cannot make awards for that student or adjust that student's existing awards.

Note: If the student does not have the specified packaging data source, the student does not receive any awards—except for *no effect* and conditional awards. For example, if you select *Federal Only* in the Packaging Data Source field and you only have institutional application data loaded for students, none of the students are awarded.

Depending on the packaging data source selected and the type of application available for a student, the and Equation Engine routines select data from either the federal application data (ISIR_** tables) or the institutional application data (INST_** tables). The data selected is then used to populate fields used by the Packaging and Equation Engine routines. Several fields selected from the ISIR_** tables do not have corresponding fields in the INST_** tables. Because of this, some packaging fields are populated with assumed values when you are packaging using institutional data. For example, database match information is not provided in the PROFILE application, so the student is assumed to have valid values for the database matches.

When the routine packages students using institutional data (Inst or Inst, Fed), it first determines whether an ISIR also exists for the student, in addition to the PROFILE or other institutional application in the system. Previously , if an ISIR existed for a student, the routine used ISIR data to determine federal eligibility and used institutional data for all other selection or eligibility criteria, such as packaging equations. Data for equations was selected when packaging data was selected. Now you must write your own equation to determine what data is selected. If only an institutional application and no ISIR exists for the student, the Packaging routine uses institutional data to determine eligibility—federal, institutional, or other—to package the student.

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The following table provides a list of the packaging fields for which a corresponding field does not exist in the institutional application data (PROFILE or an institutional application). The second column tells you how the packaging field is populated when institutional application data is selected for use in packaging.

ISIR Fields Used in Packaging Routine with no Corresponding INST (PROFILE) field	***How Packaging Fields are Populated when Institutional Data Source is used***
1ST_BACH_DEGREE	*2-No* is loaded (as an assumption).
DRUG_OFFENSE_CONV	*1-Eligible* is loaded (as an assumption).
FED_DEPEND_STAT	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
FED_EFC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
FED_NEED	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
INS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
NSLDS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
PRISONER_MATCH	*0-Not Prisnr* is loaded (as an assumption).
PRORATED _EFC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.
GRADUATE_STUDENT	*2-No* is loaded (as an assumption).
SS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
SS_REGISTRATION	Eligible — this information comes from the Student Aid Attributes table.
SSA_CITIZENSHIP_IND	Eligible — this information comes from the Student Aid Attributes table.
SSN_MATCH	Eligible — this information comes from the Student Aid Attributes table.
TITLEIV_ELIG	*Y-Yes* is loaded (as an assumption).
WEEKLY_PC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.

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ISIR Fields Used in Packaging Routine with no Corresponding INST (PROFILE) field	How Packaging Fields are Populated when Institutional Data Source is used
WEEKLY_SC	Field values are derived from available institutional application (PROFILE or an institutional application) data or an INAS calculation.

Note: The fields FED_DEPEND_STAT and INST_DEPEND_STAT are populated from federal and/or institutional data load processes and are on the STUDENT_AID table. The Packaging routine references these values to determine dependency status.

Related Links

Defining Awarding and Rounding Rules

Entering Veteran Education Benefits

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

The Packaging routine is able to include and exclude Montgomery GI Bill (Chapter 30)/AmeriCorps (Title 1) veteran education benefits based on the following criteria when awarding federal financial aid. This veteran education benefits amount must be used as follows:

- Considered as a resource, which reduces need, when awarding campus-based programs—SEOG, Federal Work Study, and Perkins.
- Excluded when determining a student's eligibility (does not reduce need) for a subsidized loan—FFELP or Direct.
- Considered as estimated financial aid for an unsubsidized loan—FFELP or Direct.

The Packaging routine then uses this amount when determining need and estimated financial aid for awarding. The Need Summary pages also display the veteran education benefits amount.

This section discusses how to:

- Enter other educational resource information.
- Process other educational resources.

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Page Used to Enter Veteran Education Benefits

Page Name	*Definition Name*	*Navigation*	*Usage*
Veteran's Education Benefits	STDNT_AWD_PER_RSRC	Financial Aid Awards > Award Processing > Identify Education Resources > Veteran's Education Benefits	Enter the amount a student receives from the Montgomery GI Bill/ AmeriCorps programs for all appropriate award periods.

Entering Other Educational Resource Information

Access the Veteran's Education Benefits page (Financial Aid Awards > Award Processing > Identify Education Resources > Veteran's Education Benefits).

EFC Status (expected family contribution status) — Displays the student's ISIR EFC status. Values are *Unofficial, Official,* and *Rejected.*

ISIR Information — Click this link to access the ISIR Information page and view selected information from the student's ISIR.

Database Matches — Click this link to access the Database Matches page and review the student's status regarding the U.S.E.D. required database matches.

Award Period — Indicates the award period associated with the veteran education benefit amount you are entering.

Montgomery GI Bill/AmeriCorps — Enter the amount the student is being awarded for veteran education benefits. The Packaging process uses the veteran education benefits amount you enter. This amount reduces need for campus-based awarding, is excluded from consideration when awarding subsidized loans (FFELP or Direct), and is included as estimated financial aid when awarding unsubsidized loans—FFELP or Direct. The amounts that you enter are specific to each award period.

Print as Other Resource — Select this check box if you want the amount that you enter to print on the Financial Aid Notification (FAN) letter as *Other Resource.* If you do not select this check box, the veteran education benefits amount does not appear on the FAN letter.

Processing Other Educational Resources

The Packaging process uses the veteran education benefits amount in the following way:

- It reduces need for campus-based awarding.
- It is *not* included in the need calculation for the awarding of subsidized loans—FFELP or Direct.
- It is included as estimated financial aid for unsubsidized loans—FFELP or Direct.

These rules are used during Manual Packaging, Auto Packaging, and Mass Packaging.

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Note: Packaging treats the veteran education benefits amount exactly the same for federal methodology (FM) and institutional methodology (IM) processing. Only one entry exists on the Student Aid Attribute record for the veteran education benefits amount. The Need Summary pages display the same amount in both the FM and IM columns.

You enter veteran education benefits amounts for both academic and non standard award periods. Be sure to divide the veteran education benefits amount correctly between award periods. During packaging, if the Award Period value on the packaging plan is *Both,* then the Packaging process adds the two award period values and uses that amount when assessing need.

If you modify the award period on the student's Term Budget record—for example, from academic to non-standard—and that student has veteran education benefits, you receive this award message: *This student has 'Other Resources' associated with this Award Period. Please check the distributions as this change may affect the student's resources/need calculation.* You must change the amount entered for the veteran education benefits to derive the appropriate amount for each award period.

Note: When the system is determining a student's eligibility for a particular award, eligibility is based on the student's period of enrollment rather than the student's loan period. If you want to calculate a one-term only loan, you must adjust/prorate the student's veteran education benefits amount accordingly.

Reviewing the Student's Packaging Status

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.

The Packaging Status Summary page provides a summary of the wide variety of information the Packaging routine uses. It includes federal and institutional verification status, disbursement hold, satisfactory academic progress, and packaging information. Other processes or actions affect many of the fields on this page. You can change these fields either manually or using Mass Change.

This section discusses how to:

- Review the Packaging Status Summary page.
- View database matches.
- Review the U.S.E.D. database match process.
- Review Pell information.
- Override Pell eligibility calculation setup values.

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Pages Used to Review the Student's Packaging Status

Page Name	*Definition Name*	*Navigation*	*Usage*
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid > View Packaging Status Summary > Packaging Status Summary	Review a comprehensive summary of a student's financial aid application and award information.
Financial Aid Term (inquiry)	STDNT_FA_TERM_SEC	Click the TERM link on the Packaging Status Summary page or the FA Term link on the Student Budget Maintenance page.	View the student's Financial Aid Term information.
Statistics (inquiry)	STDNT_FA_TERM_SEC1	Click the Statistics link on the Financial Aid Term page.	View the student's GPA related information (including term and cumulative GPA), units taken and passed, and terms in residence.
Form of Study	STDNT_FA_TERM_SEC2	Click the Form of Study link on the Financial Aid Term page.	View information relating to a student's exchange program.
ISIR Information	ISIR_INFO_SMR2_SEC	Click the ISIR Information link on the Packaging Status Summary page or the ISIR link on the Veteran's Education Benefits page.	View select information from the student's most recently loaded ISIR and information from Campus Community.
ISIR Comments	ISIR_SMR2_CMNT_SEC	Click the comment code on the ISIR Information page.	View the text of the ISIR comment and the severity of the comment code.
Database Matches	ISIR_DBMATCH_SEC	Click the Database Matches link on the Packaging Status Summary page or the Veteran's Education Benefits page.	View database matches. Review or manually override a student's status for the U. S.E.D. federally required database matches (populated by the ISIR data load process).
Need Summary	NEED_SMRY_PKG_SEC	Click the Need Summary link on the Packaging Status Summary page.	View the student's cost of attendance and need, calculated with both federal and institutional methodologies.
PELL Information	PELL_INFO_SEC	Click the PELL link on the Packaging Status Summary page.	Review Pell information or initiate Pell Payment processing for a student if they have received a Pell Grant. Update the Pell Processing Status field.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Student Override	STDNT_PELL_PKG_SEC	Click the PELL Calculation Override link on the Packaging Status Summary page.	Override your institutional Pell eligibility calculation setup for a student.
Restricted Aid Information	STDNT_RSTRCAID_SEC	Click the Restricted Aid link on the Packaging Status Summary page.	View the status and amount of the student's restricted aid award.
Financial Aid Award	STDNT_AWRD_CTG_SEC	Click the Financial Aid Awarded link on the Packaging Status Summary page.	View the student's financial aid awards. Determine whether the student's awards have been disbursed to the student.
Student SAP	SFA_SAP_STDNT	Click the SAP Details link on the Packaging Status Summary page.	View the student's Satisfactory Academic Progress details, such as attempted and earned units or current and cumulative GPA.
Student Attributes	STDNT_AID_PKAGE_CA	Financial Aid, View Packaging Status Summary, Student Attributes.	Enter values for fields created using the Common Attribute Framework.

Reviewing the Packaging Status Summary Page

Access the Packaging Status Summary page (Financial Aid > View Packaging Status Summary > Packaging Status Summary).

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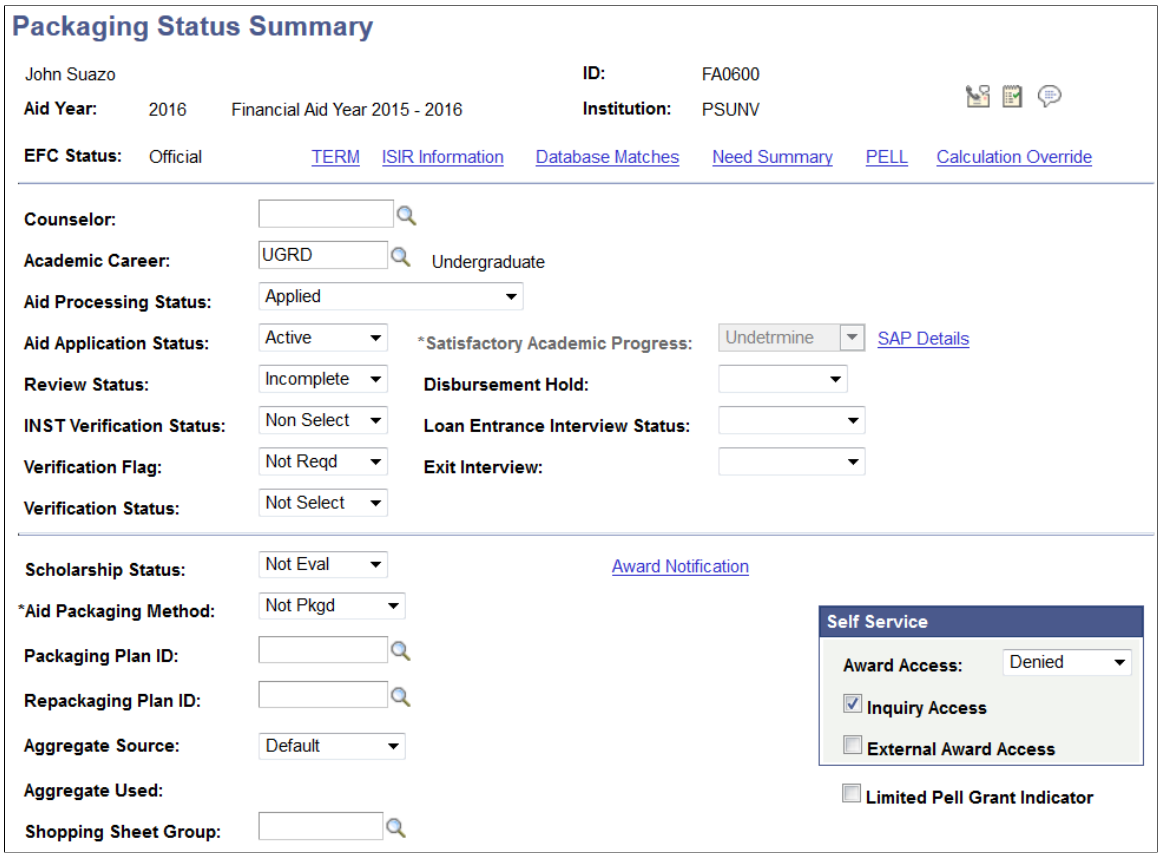
Image: Packaging Status Summary page

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



EFC Status (expected family contribution status)	Displayed from the financial aid application data. The student's EFC can be *Official, Rejected,* or *Unofficial.*
TERM	Click this link to access the Financial Aid Term page and view Financial Aid Term information.
ISIR Information	Click this link to access the ISIR Information page and view some of the student's ISIR information.
Database Matches	Click this link to access the Database Matches page and review a student's status regarding the U.S.E.D. required database matches.
Need Summary	Click this link to access the Need Summary page and view the student's need summary information calculated with both federal and institutional methodologies.
PELL	Click to access the PELL Information page and view Pell information or to initiate Pell Payment processing for a student if they have received a Pell Grant.

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PELL Calculation Override

Click this link to access the Pell Eligibility Calculation - Student Override page and override your institution's Pell eligibility calculation values for this student.

Counselor Name

Enter a financial aid counselor's ID in this field if a particular counselor is assigned to the student.

Restricted Aid

This link appears only if the student has restricted aid information entered on the Restricted Aid page. Click to access the Restricted Aid Information page and view the status and amount of the student's restricted aid award.

Financial Aid Awarded

This link appears when the student has one or more financial aid awards. Click to access the Financial Aid Awards page and view the student's financial aid awards.

Academic Career

This value is entered with the first ISIR load and is not changed by subsequent ISIR loads. If the student has multiple careers, the settings that you establish on the Prospect Source Cross Reference Setup page determine the career entered in this field. Update this field by selecting the correct career for the student. The value in this field is automatically updated after the student has been packaged.

Aid Processing Status

Indicates where the student is in the Awarding process. You can also update this status using the Package Status field on the award entry pages.

Use this field in Mass Packaging to determine whether students are ready to be packaged. The Disbursement Authorization routine also uses this field to determine whether a student's package is complete, if you select the Package Complete check box on the Disbursement Rules: Global - Indicators page or the Disbursement Rules: Item Type - Indicators page.

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

No Electronic Application: No electronic application has been received.

Packaging Completed: The student's award package has been posted. The Posting routine automatically updates the field to this value. To repackage a student after their status has been changed to *Packaging Completed,* use Manual or Auto Packaging or set up a Mass Packaging query definition to select students with a status of *Packaging Completed.*

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

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Ready for Packaging: The student is ready for packaging. When you select students for Mass Packaging, you may want to choose only students whose status is set to this value; otherwise, any student who meets the Mass Packaging query definition is selected regardless of aid processing status.

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

Aid Application Status

Indicates whether the student's financial aid application is available for financial aid processing.

(none): You have not assigned the student's financial aid application a status. You cannot access certain pages until you enter a status.

Active: The student's financial aid application is active for financial aid processing. The system assigns this value automatically when you load the student's first ISIR into the system.

Canceled: You have canceled the student's financial aid application. You must enter this value manually.

Restricted: The student has applied for restricted aid only. You must enter this value manually.

Satisfactory Academic Progress

Indicates whether the student is meeting satisfactory academic progress (SAP). The Packaging routine uses this field to determine whether to award federal aid to the student. The Satisfactory Academic Progress global disbursement rules use this field to determine whether to authorize disbursement of the student's award. Also, CommonLine Disbursement Hold and Release processing can use this field to determine whether the student's loan disbursement should be held or released.

*Academic Plan:*The student does not meet satisfactory academic progress and has been placed on an academic plan that leads to meeting SAP. This value allows federal awards to be made and the student's award to be authorized for disbursement.

Meets SAP: The student is meeting satisfactory academic progress. This value allows federal awards to be made and the student's award to be authorized for disbursement.

Not Meet: The student is not meeting satisfactory academic progress. Federal awards are not made, and if already awarded the student's award is not authorized for disbursement.

Probation: The student does not meet satisfactory academic progress and has been placed on Probation. This value allows federal awards to be made and the student's award to be authorized for disbursement.

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Undetrmine: (undetermined) Satisfactory academic progress is undetermined or has not been calculated. Federal awards are not made, and if already awarded, the student's award is not authorized for disbursement.

Warning: This value should only be used by institutions that process satisfactory academic progress by term. A student that does not meet satisfactory academic progress for the first time is assigned a warning status. This value allows federal awards to be made and the student's award to be authorized for disbursement.

SAP Details

Click on this link to view the Student SAP page.

Review Status

Indicate the status of the review if your institution conducts a review of the student's financial aid application.

(none): Indicates that your institution does not conduct a review.

Complete: The review of this application has been completed.

Incomplete: This application is awaiting a review.

Disbursement Hold

Enables you to place a hold on the student's awards that is specific to disbursement processing. You can opt to hold authorization/disbursement of financial aid if a hold is present.

(none): No holds are placed on this student's financial aid.

Fed Aid (federal aid): Places a hold on the authorization/disbursement of federal aid only.

Institut. (institutional): Places a hold on the authorization/disbursement of institutional aid only.

Loan Hold: Places a hold on the authorization/disbursement of loans.

INST Verification Status
(institutional verification status)

Indicates the status of your verification process if your institution conducts a verification of the student's financial aid application. You must set these values manually if you want to use them in the verification process.

(none): Indicates that your institution does not conduct an institutional verification.

Doc Select: The student has been selected for institution verification of a document only.

Non Select: The student has not been selected for institutional verification.

Select: The student has been selected for institutional verification.

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Loan Entrance Interview Status

Note: The Loan Entrance Interview Status field displays when the Financial Aid Installation default for Loan Counseling Version is *Simple.*

Indicates whether the student has completed a loan entrance interview for the corresponding aid year. If you select the Loan Entrance Intervw Req (loan entrance interview required) check box on the Disbursement Rules: Item Type - Indicators page, the interview status value affects how the authorization process treats the student's award.

(blank): The authorization process automatically determines whether the student has satisfied the loan entrance counseling requirement using the process activated when you select the Loan Entrance Intervw Req check box.

Complete: The student has completed a loan entrance interview. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized. Set this value after confirmation of the student's completion of loan entrance counseling.

Inst Req (institution required): Your institution requires the student to have a loan entrance interview, regardless of whether the authorization process requires an interview for loan awards. If the Loan Entrance Intervw Req check box is selected, the authorization process fails until you reset the status to *Complete* or *Pending.* Students with prior loan history also fail authorization until you reset the status to blank, *Complete,* or *Pending.*

Pending: The student's loan entrance interview is pending. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized.

See Understanding Loan Counseling.

See Managing Loan Counseling Data.

Exit Interview

Note: The Exit Interview field displays when the Financial Aid Installation default for Loan Counseling Version is *Simple.*

Indicates whether the student has completed a loan exit interview for the corresponding aid year. This field is for informational use only because no delivered process currently uses the value of this field.

Complete: The student has completed a loan exit interview.

Inst Req (institution required): Your institution requires the student to have a loan exit interview.

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Pending: The student's loan exit interview is pending.

Loan Counseling Status

Note: The Loan Counseling Version hyperlink displays when the Financial Aid Installation default for theLoan Counseling Versionis *Expanded.*

This is a link to the Entrance/Exit Loan Counseling page.

Verification Flag

Indicates the status of the Department of Education's verification requirement for this student. You can choose to hold Authorization/Disbursement of financial aid if the status is not *Complete* by selecting the Verification Complete check box on the Disbursement Rules Global page.

(none): This value is treated the same as the *Not Reqd* value.

Complete: Indicates that you have completed verification either manually or by the Auto Verification process.

Not Reqd (not required): The student has not been selected for verification by the Department of Education. This is the default value for this field.

Pending: The student has failed Auto Verification. This value is automatically populated by the Auto Verification process.

Required: The student has been selected for verification. This value is automatically populated when you load the student's ISIR data.

Verification Status

This is associated with the awarding of federal funds, including Pell Grants, Stafford loans, and Direct Loans. It indicates the code you use when reporting a Pell payment made to a student.

Accurate: Indicates that the ISIR transaction number is 01, meaning the ISIR information is accurate and no changes are needed. Auto verification enters this value, but you can enter it manually.

Calculated: Indicates that you have calculated the Pell eligibility based on ISIR corrections, and the Pell eligibility has not changed.

Not Select: The student was not selected for verification.

Not Verfd (not verified): Indicates that a student was selected for verification but was not verified.

Reprocess: Indicates the SAR needs to be sent for corrections, and is used for all ISIR transaction numbers that are not 01.

Tolerance: Indicates that a student's verification passed within the tolerance level.

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Wtht Doc (without documentation): Indicates that the first Pell payment was made to the student before verification was completed. You can only use this value for one Pell payment. Subsequent payments/disbursements require reporting a different verification status.

Scholarship Status

Identifies whether you have evaluated a student for scholarship funds. This is an information only field. It does not affect the Packaging process.

Evaluated: You have evaluated the student for scholarship funds.

Not Eval (not evaluated): You have not evaluated the student for scholarship funds.

Award Notification

Click this link to access the FE Award Notification Detail page.

Aid Packaging Method

The method used to create the student's financial aid package. The values in this field are automatically updated.

Auto: Packaged using Mass Packaging. View the packaging plan used to package the student in the Packaging Plan ID field.

Counselor: A financial aid counselor packages the student manually or using Auto Packaging. If Auto Packaging is used, view the packaging plan used to package the student in the Packaging Plan ID field.

Not Pkgd (not packaged): Not yet packaged. This is the default value until you manually change it.

Packaging Plan ID

If you use Auto Packaging or Mass Packaging to package the student, this field identifies the packaging plan used to package the student. The Mass Packaging process populates this field when it is run in live mode. When Auto Packaging is used, the Posting routine populates the packaging plan ID.

Repackaging Plan ID

If you use Auto Repackaging or Repackaging, this field identifies the repackaging plan used. The Repackaging process populates this field when it is run in live mode. When Auto Repackaging is used, the Posting routine populates the repackaging plan ID.

Aggregate Source

Identifies and defines the aggregate source that the Awarding and Packaging process uses directly. Prior to any awarding or packaging, this identifies the default value for manual, auto, or mass packaging. You can also change the aggregate source on any of the awarding pages. If online awarding or packaging is already complete, the value here represents the aggregate source used during the Packaging routine.

Default: Identifies aggregate source to be used based on value defined on FA Installation Defaults.

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NSLDS: Indicates that awarding and packaging uses the NSLDS aggregate totals.

PS: Indicates that awarding and packaging uses system generated and maintained aggregate totals.

Aggregate Used

Indicates the aggregate source used during packaging.

NSLDS: Indicates NSLDS aggregate totals used.

PS: Indicates system generated and maintained aggregate totals used.

Note: Pell Grant eligibility always uses NSLDS aggregate values.

Shopping Sheet Group

Select the appropriate Shopping Sheet Group code for this student.

Self Service

Award Access

Displays the result of how you set up the Self-Service Access page. Values are *Allowed* or *Denied.*

Inquiry Access

Select this check box to allow a student to view assigned financial aid awards.

External Award Access

Select this check box to allow a student to report awards from other sources.

Limited Pell Grant Indicator

Limited Pell Grant Indicator

Select this check box to indicate:

- the student's *first* enrollment is on or after July 1, 2015, *and*
- the student is eligible under one of the Ability to Benefit alternatives for enrollment in an eligible Career Pathway program

If this check box is selected and the student is otherwise Pell-eligible, the student is awarded using the Career Pathway Alternate Pell Grant Disbursement Schedule.

If this check box is not selected, and the student is otherwise Pell-eligible, the student is awarded using the Regular Pell Grant Disbursement Schedule.

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Note: This indicator can be set for multiple students using Population Update. Add SFA_LPG_IND (Limited Pell Grant Indicator) to the STDNT_AID_ATRBT (Packaging Status Summary) record by inserting a new row.
See "Securing and Setting Up the Population Update Process" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

Related Links

Defining Basic Global Rules for Authorization
Managing Disbursement Hold and Release Processing
Working with Auto Verification
Awarding Restricted Aid
"Setting Up Self-Service Inquiry Options" (PeopleSoft Campus Solutions 9.2: Self Service)
"Setting Up Self-Service Awarding Options" (PeopleSoft Campus Solutions 9.2: Self Service)
Setting Up and Accessing a Financial Aid Shopping Sheet

Viewing Database Matches

Access the Database Matches page (click the Database Matches link on the Packaging Status Summary page or the Veteran's Education Benefits page).

The database match values on this page are display only. The Validation routine uses these values to determine whether the student is eligible for federal financial aid using previously defined eligibility rules. If you want to change the federally reported database match value to allow a student to receive federal aid, you must submit a history correction. When that history correction has been resolved and a Correction ISIR has been received by your institution, the database match field in question contains the resolved value. As a result, you can process the student for federal aid. If you want to award the student federal aid prior to receiving the revised Correction ISIR, you must select the Override check box.

The system enforces additional federal database edits for the following existing database matches:

- Student's Social Security Number match with SSA: student's date of birth inconsistent with SSA records.
- Veteran Status match with Veteran Affairs: independent due to VA status.

During packaging, the system performs the database match edits in the following sequence:

1. SSN Match
2. SSA Citizenship
3. DHS (formerly INS) Match
4. VA Match
5. Selective Service Match
6. Selective Service Registration
7. NSLDS Match

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8. Drug Offense Conviction
9. Parent SSN Match

The system checks the first database match in the sequence (SSN Match) and determines whether or not resolution is required. When it encounters a database match that needs resolution, it does not perform any additional database match checks until the match in question is resolved. After you resolve the database match issue, the system then checks the next database match in the sequence. For example, if a student has three database match problems, the system does not perform all three checks at the same time. It starts serially with the first one. If the match is good, it moves to the next match. If the next one is not good, the system does not perform any more database checks until that database match is resolved.

Important! When you override a federally reported database match value, your institution assumes full responsibility for changing these values.

Override	Select the check box next to a database match value to override the federally reported match value. This indicates that you have made a professional judgement decision and want the system to award and disburse federal financial aid for this student. If you want override a federally reported database match value for a group of students, you can use Mass Change to select the Override check box.
SSN Match (social security number match)	If you try to award federal monies to the student for the field values that do not allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: SSN match code indicates student is not federally eligible.* *Date of Dt* (date of death): According to the Social Security Administration (SSA), the SSN the student provided belongs to a deceased person. The Validation routine does *not* allow you to award federal financial aid to this student. *Late:* See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags. *Match:* The SSA found a match for the student's SSN. The Validation routine allows you to award federal financial aid to this student. *Mismatch:* The student's date of birth or name did not match the SSA's records for the SSN. The Validation routine does *not* allow you to award federal financial aid to this student. *No DOB:* No match was conducted because the student did not provide date of birth information. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must provide date of birth information on the SAR. *No Match:* The SSA did not find a match for the student's SSN. The Validation routine does *not* allow you to award federal

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financial aid to this student. To be eligible to receive federal funds, the student must correct the SSN on the SAR, submit a new FAFSA with the correct SSN, or contact the SSA.

No Name: No match was conducted because the student did not provide his or her first or last name, or both. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must provide both first and last name on the SAR.

Not Sent: No match was conducted because the SSN provided by the student did not fall within the valid range of SSNs. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must correct the SSN on the SAR, submit a new FAFSA with the correct SSN, or contact the SSA.

SSA Citizenship Indicator (social security administration citizenship indicator)

If you try to award federal monies to the student for the field values that do not allow you to award federal financial aid, the Validation routine returns a zero award amount and the following award message: *DB Match: SSA Citizenship Indicator denotes student is not Federally eligible.*

Alien/cond: The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

Alien/stud (alien student): The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

foreign bn (foreign born): The student was born in a foreign country to American parents who were stationed in another country. The student must provide of citizenship, such as a birth certificate indicating that the student is a U.S. citizen born abroad to be eligible for federal financial aid. The Validation routine allows you to award federal financial aid to this student.

LA/wk elig (legal alien, work eligible): The student is not a U. S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

LA/wkinelg (legal alien, work ineligible): The student is not a U. S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

Name/DOB: The SSA was unable to verify the student's citizenship because there was no match on SSN, name, or date of birth. The Validation routine does *not* allow you to award federal financial aid to this student. To receive federal financial aid, the student must make corrections to Social Security Number, name or date of birth on the SAR or submit a new FAFSA with the correct information. If the student believes the

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provided information is correct, the student must contact the Social Security Administration and provide documentation that verifies citizenship status.

Other: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

U.S. Citiz (U.S. citizenship): The SSA confirmed the student's U.S. citizenship status. The Validation routine allows you to award federal financial aid to this student.

DHS/INS Match Flag (Department of Homeland Security / Immigration and Naturalization Service match)

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: INS match code indicates student is not federally eligible.*

Values are:

Confirmed: The INS confirmed the student's non-citizen eligibility. The Validation routine allows you to award federal financial aid to this student.

Late: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

Mismatch: The INS match was not conducted, because the student did not indicate citizenship status, the student changed from eligible non-citizen to citizen or changed the Alien Registration Number, or the student did not provide a valid Alien Registration Number. The Validation routine does *not* allow you to award federal financial aid to this student.

Not Conf (not confirmed): The INS did not confirm the student's eligible non-citizenship status. The Validation routine uses the value of the Sec INS Match Flag field to determine whether to award federal financial aid to this student.

Sec DHS/INS Match Flag (secondary Department of Homeland Security / Immigration and Naturalization Service match flag)

Values are:

Pending: Automated secondary confirmation in progress. The Validation routine does *not* allow you to award federal financial aid to this student.

Confirmed: Citizenship confirmed. The Validation routine allows you to award federal financial aid to this student.

Not yet: In continuance. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must wait another 10 days for an updated ISIR or send copies of the student's proof of eligibility to the INS.

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Not Conf (not confirmed): Citizenship not confirmed. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must send copies of the student's proof of eligibility to the INS.

No info: INS needs more information. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must send copies of the student's proof of eligibility to the INS.

VA Match (veteran's administration match)

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: VA match code indicates student is not federally eligible.*

Active Dty (active duty): Record found on VA database but applicant is on active duty. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student.

Confirmed: Veteran status confirmed. Student is eligible for federal aid.

No Qualify: Record found on VA database but the student is not a qualifying veteran. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student.

Not Found: Record not found on VA database. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student.

Not Sent: Record not sent for match. Student is eligible for federal aid.

Selective Service Match

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Selective service match code indicates student is not federally eligible.*

Note: When awarding a student whose gender is defined as female in Bio/Demo data, this field has no bearing on awarding federal financial aid.

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Exempt: Student is within 45 days of his birthday, and is temporarily exempt because the student is not yet 18 years old. An update is not required during the year. The Validation routine allows you to award and disburse federal financial aid with this field value.

Mismatch: The student could not be registered with Selective Service, because the student is not between the ages of 18 and 26 or information needed to register the student is missing.

Not Conf (not confirmed): The student is not registered with the Selected Service. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, the student must register with Selective Service, present appropriate registration that he is already registered, or qualify for a waiver or exemption.

Reg Conf (registration confirmed): Match conducted and the applicant's registration status is confirmed by the Selective Service. The Validation routine allows you to award and disburse federal financial aid with this field value.

Ret Late: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

Selective Service Registration

Values are:*Exempt, Late, Mismatch, Not comp* (not completed), and *Reg Conf* (registration confirmed).

NSLDS Match (National Student Loan Data System Match)

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: NSLDS match code indicates student is not federally eligible.*

Def/Ovrpay (default/overpayment): A match for the student was found, and the student has at least one loan in default and owes at least one overpayment. The Validation routine does *not* allow you to award and disburse federal financial aid with this field value.

Default: A match for the student was found, and the student has at least one loan in default. The Validation routine does *not* allow you to award and disburse federal financial aid with this field value.

Eligible: A match for the student was found, and the student's NSLDS data is sent. The Validation routine allows you to award and disburse federal financial aid with this field value.

Init/Late: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

Mismatch: A match for the student's SSN was found, but neither name nor date of birth matched. No NSLDS data is sent. You

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must access NSLDS online using SSN only to retrieve the matching data and determine whether the record belongs to the student. If the record belongs to the student, you must determine whether the student is eligible for federal financial aid. If the record does not belong to the student, the student is eligible for federal financial aid.

No Data: No match for the student was found. The student does not have NSLDS data. The Validation routine allows you to award and disburse federal financial aid with this field value.

Not Sent: A match for the student was found, but no NSLDS data was sent to the CPS. The Validation routine allows you to award and disburse federal financial aid with this field value.

Overpayment: A match for the student was found, and the student has received at least one overpayment of federal student aid funds (Pell Grant, FSEOG, or Perkins). The Validation routine does *not* allow you to award and disburse federal financial aid with this field value.

Partl Elig (partially eligible): A match for the student was found, and the student has received a total amount of student loans that is close to the loan limits established for the federal loan programs. The Validation routine allows you to award and disburse federal financial aid with this field value, but use caution to ensure that the student does not exceed his or her loan limits with subsequent Title IV loans.

Prisoner Match

This database match indicates a student's incarcerated status. If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Prisoner match code indicates student is not federally eligible.*

Note: When processing awards using institutional data (not ISIR data), the Packaging process uses the *Not Prisnr* (not a prisoner) value for this database match.

Values are:

Blank: The system does *not* allow you to award federal financial aid to this student.

Local: The student is incarcerated in a local facility. The student is *not* eligible for federal loans but is eligible for other federal financial aid. If a federal loan is awarded to the student, the amount is reduced to zero by the Validation process, and an award message indicates the reason for the zero amount.

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Not conduc (not conducted): The student's record was sent but the database match was not conducted. The Validation routine does *not* allow you to award federal financial aid to this student.

Not Prisnr (not a prisoner): The student is not incarcerated in a state or federal prison. The Validation routine allows you to award and disburse federal financial aid with this field value.

Not sent: The student's record was not sent for a prisoner database match. If the student's name or date of birth is missing, the Validation routine does *not* allow you to award federal financial aid to this student. If the student is a Pacific Islander and the student's SSN begins with 888, the Validation routine allows you to award and disburse federal financial aid to this student.

State/Fed (state/federal): The student is incarcerated in a state or federal facility. The Validation routine does *not* allow you to award federal financial aid to this student.

Drug Offense Conviction

This database match indicates the student's status relative to drug offense convictions due to either *drug abuse debarment and suspension activity* or *terms of the Anti-Drug Abuse Act of 1998.* The student can be ineligible for federal financial aid due to a drug offense conviction or pending activity.

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Drug Offense Conviction match code indicates student is not federally eligible.*

Note: When processing awards using institutional data (not ISIR data), the Packaging process uses the *1 − Eligible* value for this database match.

Values are:

Blank: no value in this field plus a SAR C flag means the system does *not* allow you to award federal financial aid to this student.

1 − Eligible: The student is eligible for federal financial aid. The system allows you to award and disburse federal financial aid with this field value.

2 − Partially Eligible: The student becomes eligible for federal financial aid during the award year. The period of eligibility depends on the type of aid. For loans, the student becomes eligible for loans during the Loan Period. For all other aid, the student becomes eligible at the beginning of the term for which the student was cleared of the drug offense conviction.

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The system treats the student as fully eligible for all term/disbursement periods. It is your responsibility to limit the student's eligibility to a specific term/disbursement period as needed. When a federal aid award is made, the full award amount is awarded and the following Award Message is displayed: *DB Match: Drug Offense Conviction match equals '2 - Partially Eligible'. Verify the amount of this award to ensure proper term/loan period eligibility.*

3 − Ineligible: The student is not eligible for federal financial aid due to the student's current or pending drug conviction activity. The system does *not* allow you to award federal financial aid to this student.

Father's SSN Match and **Mother's SSN Match**

The system performs an eligibility check on each parent's social security number match based on the Database Matches and Match Flags specifications. If either of the match flag values for the parents' social security numbers results in a failed match with SSA, the student does not receive federal aid.

On the Database Matches page, despite there being two SSN Match fields for the mother and father, only one Override check box exists for the parents' SSN match. The Override check box controls both. If the father's social security number is a match and the mother's is not or vice versa, or both mother and father are not a match, and if you select the Override check box for the parents' SSN match override field, the system considers the match to be good and awards the student federal aid.

Note: When you override a federally reported database match value, your institution assumes full responsibility for changing these values.

Dept of Defense Match

Select to identify the student as a child of a post-9/11 deceased military service member. Once selected, use the Professional Judgment component to award the student all Title IV funding as eligible, either as a Pell-eligible (zero EFC) or not Pell-eligible (original EFC) candidate.

PLUS Override

Select to identify a dependent undergraduate student who is eligible for additional Unsubsidized Stafford Loan because his or her parents are deemed a credit risk or for professional judgement reasons. If you select this check box, the Packaging process does not award a PLUS loan and allows a dependent undergraduate student to become eligible for additional Unsubsidized Stafford Loan funds. This field also displays on the aggregate aid summary components, for aggregate areas that correspond to either the FFELP or Direct Loan programs.

Title IV Fund Eligibility

Select to identify the student as eligible for Title IV funds. If the check box is cleared, no federal aid is awarded to the student.

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	This field is evaluated when an ISIR is received for the student and is cleared if error code 19 is reported on the ISIR.
Special Circumstances Flag	Select if the student's Special Circumstances Flag = 4, Dependent record unsubsidized loans only. Use the Professional Judgment component to award this rejected dependent student an unsubsidized loan.
HEAL Eligible and **PreProfessional Coursework**	Select to increase Stafford loan limits for eligible health professional or preparatory coursework candidates.
	Note: Packaging and Repackaging processes do not automate the awarding of an additional Unsubsidized Stafford amount based on a student participation in an eligible health profession program or preparatory coursework program. Additional Unsubsidized Stafford amounts must be awarded from the Professional Judgement page (Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement). If a Direct Loan Unsubsidized Stafford award is based on participation in an eligible health professional program or preparatory coursework, you must select the relevant check box here on the Database Match page before you build the Direct Loan origination application record. Indicators are carried forward to the Direct Loan origination application record for COD reporting. The HEAL Eligible and PreProfessional Coursework check boxes have no impact on the Packaging and Repackaging components and are used only by Direct Loan COD reporting for Unsubsidized Stafford loans.

Reviewing the U.S.E.D. Database Match Process

To evaluate database matches, Campus Solutions uses the ISIR Comment table as the basis for determining the student's eligibility for federal aid. Administrators can control eligibility through the severity level value assigned to an ISIR comment. The system compares ISIR comments on the student's record to the ISIR Comment table and evaluates eligibility for federal aid based on that database match.

The DB Match Use value in the ISIR Comment table corresponds to a U.S.E.D. database match. Each comment is associated with a severity level. The severity level associated with the DB Match Use field effects how the system handles the database match during packaging.

Severity levels are pre-defined according to the combination of the database match value, ISIR comments, and the presence of reject codes and SAR C flag. The values are as follows:

Severity Level	*Resolution*
0	Ignore. Requires no action. Federal aid can be awarded.

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Severity Level	*Resolution*
1	Action required. Indicates a reject condition exists for the assigned DB Match Use value. Federal aid cannot be awarded. Database match needs resolution.
2	Action required. Indicates SAR C on file. Federal aid cannot be awarded. Database match needs resolution.

Based on these severity levels, if a student has an ISIR comment with a severity level 1 or 2 and the DB Match Use field is not blank, the system does not award the student federal aid until the errant condition, and therefore the corresponding ISIR comment, are resolved.

Note: The DB Match Use and SAR C Flag values are set based on the most recent ISIR record loaded for the aid year.

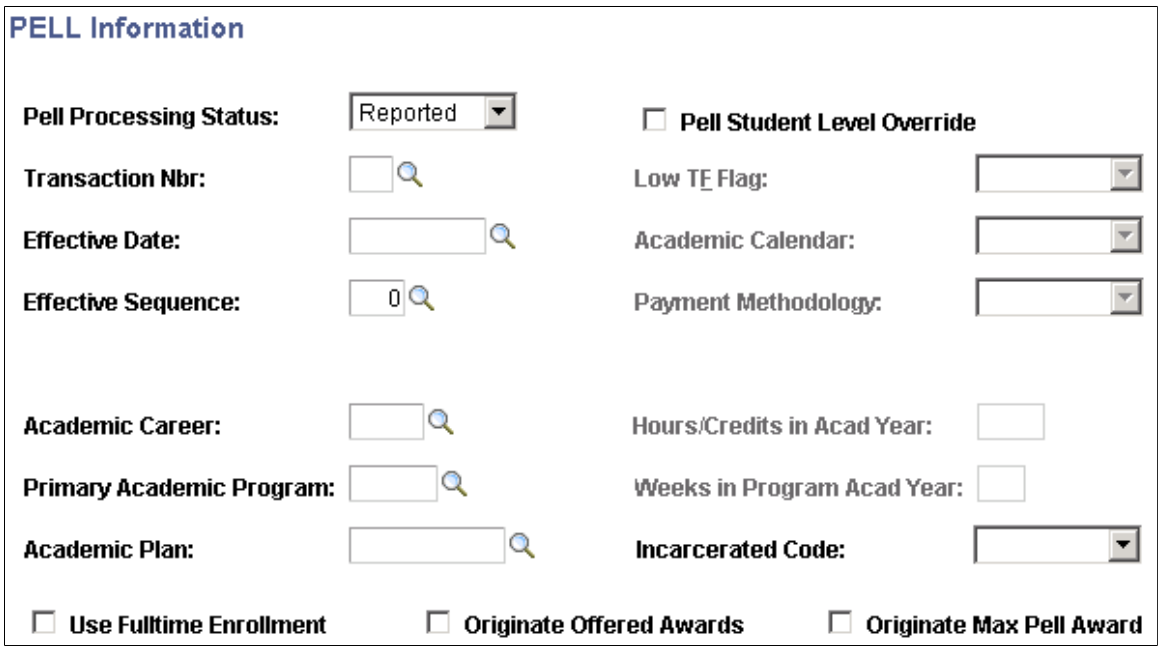
See Setting Severity Levels for ISIR Comment Codes.

Reviewing Pell Information

Access the PELL Information page (click the PELL link on the Packaging Status Summary page).

Image: PELL Information page

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



The fields on this page are populated when Pell data, from the ISIR, is loaded in the system.

Pell Processing Status

Displays information about the status of a student's Pell payment processing.

Accepted: Default value populated from the inbound Pell Payment file (EPPPD) when the ED Record Status is Accepted.

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Not Sent: Use this status to prevent the student from being included in the Pell Payment request run. You must enter this status manually.

Pending: Default value if a Pell Grant is awarded to the student. Indicates that the student's file is waiting to be sent with a Pell Payment request (EPPPD) submission. *Pending* may also indicate a previously accepted Pell Payment request (EPPPD), which has since come back as *not* equal to an Accepted or Accepted w/Assumption outcome.

Repackaged: Indicates an initial Pell Grant has been changed. You must change this status to *Send* before the student is included in the Pell Payment request run. Incoming Pell Payment (EPPPD) files do not load if the status is *Repackaged.* Review SQR log upon loading Pell Payment (EPPPD) files.

Reported: is automatically set when a student's Pell data has been selected during an EPPPD SQR run.

Review: is populated by default from the inbound Pell Payment file (EPPPD) when the ED Record Status is Rejected, Error, Accepted w/Assumptions, or Duplicate.

Selected: is automatically set as a result of running the FAPELLR process. Incoming Pell Payment (EPPPD) files do not load if Pell Processing status has been reset to *Selected.* Review SQR log upon loading Pell Payment (EPPPD) files.

Send: This status is an internal Pell Processing flag for the system. It indicates that the student's record is ready to be transmitted on an outbound Pell Payment (EPPPD) file. This field value is either set manually or through Mass Change. Incoming Pell Payment (EPPPD) files do not load if the Pell processing status has been reset to *Send* since the (EPPPD) creation. Review SQR log upon loading Pell Payment (EPPPD) files.

Transaction Nbr (transaction number) and **Effective Sequence**

Displays the transaction number and effective sequence from the selected ISIR, usually the most recent ISIR. All ISIRs are available for selection and you can change these values to indicate another ISIR. If you want to enter a Pell amount manually when awarding a Pell Grant, use the transaction number, effective date, and effective sequence to indicate the ISIR that you used to calculate the Pell amount.

Primary Academic Program

Indicates the student's main academic program. The academic program from the student's Financial Aid Term record is the default value in this field.

Incarcerated Code

Select the appropriate incarcerated code: *N - No longer Incarcerated* or *Y - Incarcerated.* This field is left blank for most students.

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Use Fulltime Enrollment Select this check box if you want to use full-time enrollment to calculate the student's Pell award.

Originate Offered Awards Select this check box to originate Pell awards with an award status of *Offered.* If this check box is cleared, Pell awards are only originated when the award status is *Accepted.*

Originate Max Pell Award (originate maximum Pell award) Select this check box to originate Pell awards based on the maximum Pell award defined on the Pell Payment Setup page. The system originates the maximum Pell amount regardless of how much the student was offered for the Pell award.

Pell Student Level Override Select this check box to override at the student level the payment plan information that you set up on the Pell Payment Setup page. When you select this check box, the Low T&F Flag, Academic Calendar, Payment Methodology, Pell Payment Periods, Hours/Credits in Acad Year, and Weeks in Program Acad Year fields become available.

Related Links

Defining Pell Payment Setup

Awarding Pell Grants

Overriding Pell Eligibility Calculation Setup Values

Access the Student Override page (click the PELL Calculation Override link on the Packaging Status Summary page).

Status Select Active to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods.

Select Inactive to use the PEC setup at FA installation, career, or program level.

Pell Calculation Start Enter the calculation mode to use for Pell calculations made before the student's academic term start date. Values are:

*Enrollment Current Load (For use only with 2009 and prior Aid Years):*Directs the Pell calculation to use the Current Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units that the student is currently enrolled in, plus the number of units from already completed sessions in the term to determine the student's load for the term.

Enrollment FA Load (For use only with 2009 and prior Aid Years): Directs the Pell calculation to use the FA Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's

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eligibility for a Pell Grant. The FA Load value uses the number of financial aid eligible units that the student is enrolled in for the term to determine the student's load.

Formula 1 — FA Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to divide the Pell Grant award by the Pell Number of Terms and uses the student's actual FA Load for each term.

Formula 1 — Full-time (For use only with 2010 and future Aid Years): Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses Full-time as the student's FA Load for each term.

Formula 3 — Current Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the Current Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term.

*Formula 3 — FA Load (For use only with 2010 and future Aid Years):*Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the FA Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

*Formula 3 — Full-time Load (For use only with 2010 and future Aid Years):*Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility.

Full Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the full time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant regardless of the student's enrollment.

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Half Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the half time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant, regardless of the student's enrollment.

Pell Calculation Midterm

Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

Pell Calculation Census

Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.

Academic Base Weeks

Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated expected family contribution (EFC).

Valid values are 0.0 to 99.9.

Non-Standard Base Weeks

Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions.

Valid values are 0.0 to 99.9.

Pell Number of Terms

Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no automatic cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using *Formula 1 - FA Load* or *Formula 1 - Full-time* Pell calculation values. If you select *Formula 1 - FA Load* or *Formula 1 - Full-time,* you must populate the Pell Number of Terms field.

Valid values are *0 to 99.*

Use PELL Crossover Logic

Select this check box if you want the system to a check the summer/crossover term to determine if a Pell Grant award for that term would be higher if it is awarded using the *Additional* Pell Item Type for the current Aid Year (e.g. Aid Year 2018) or the *Initial* Pell Item Type in the forward Aid Year (e.g. Aid Year 2019).

If selected and the award would be higher for the forward Aid Year, the system awards zero Pell Grant for the summer/crossover term under the Additional Pell item type the current Aid Year. If the Pell Grant award for the summer/crossover term

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is higher using the current Aid Year, it will award the amount as Additional Pell.

If *not* selected, the system awards Pell Grant for the summer/crossover term as Additional Pell in the current Aid Year without additional checks against the forward Aid Year.

Related Links

Defining Installation Level Defaults

Reviewing the Student's Financial Aid Status

The Financial Aid Status page is a display-only page primarily suited for front office staff to provide a high level assessment of a student's financial aid application for the aid year. Many of the fields and links displayed on the Financial Aid Status page are described in the Packaging Status Summary page documentation. Please refer to that documentation for field and link descriptions, keeping in mind that all fields in the Financial Aid Status page are display only.

Note: The Financial Aid Status page is a display-only page.

Note: The Financial Aid Status page displays many of the same fields and data as the Packaging Status Summary page. Please refer to the Packaging Status Summary page documentation for descriptions of many of the fields and links in the Financial Aid Status section.

See Reviewing the Packaging Status Summary Page.

Page Used to Review the Student's Financial Aid Status

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid Status	SS_FA_AU_STATUS	Financial Aid, View Financial Aid Status	View selected information regarding a student's financial aid application status.

Reviewing the Financial Aid Status Page

Access the Financial Aid Status page (Financial Aid > View Financial Aid Status).

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Image: Financial Aid Status page (1 of 2)

This example illustrates the fields and controls on the Financial Aid Status page (1 of 2). You can find definitions for the fields and controls later on this page.

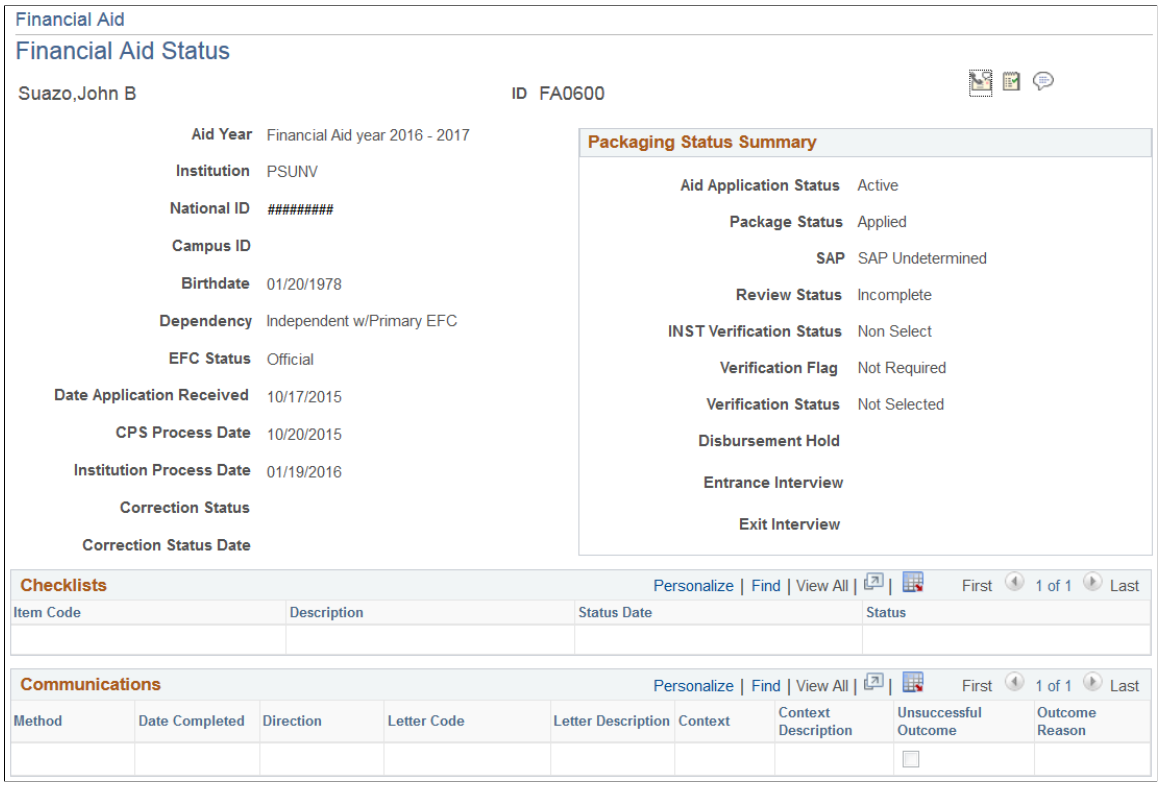
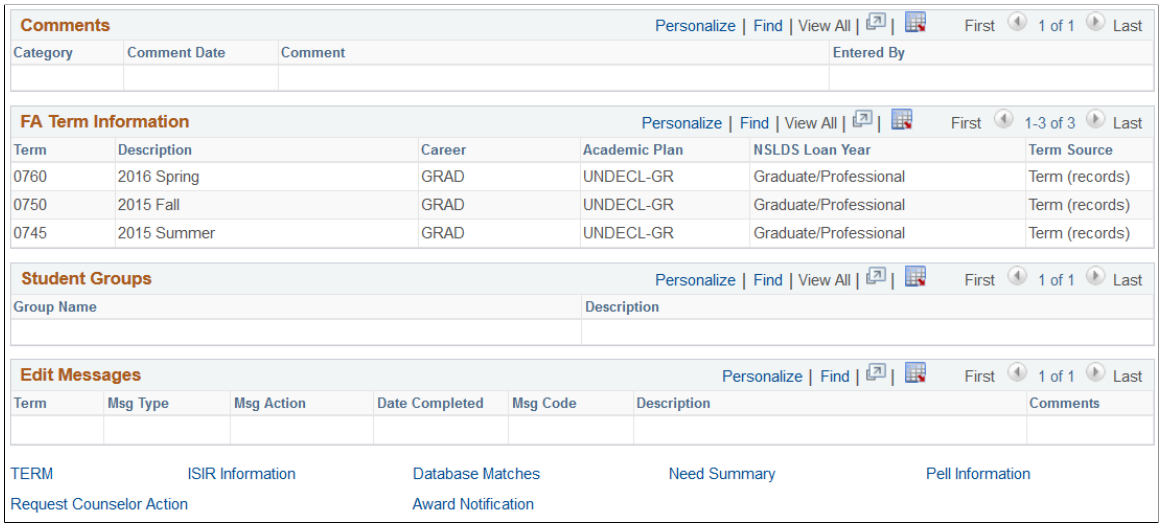


Image: Financial Aid Status page (2 of 2)

This example illustrates the fields and controls on the Financial Aid Status page (2 of 2). You can find definitions for the fields and controls later on this page.



Page Header

App Date

Displays the date that the U. S. Department of Education's Central Processing System (CPS) received the initial application

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	for the Aid year in context. This date *never* changes, even on subsequent ISIR transactions. This value comes from the most recently loaded ISIR.
CPS Date (central processing system date)	Displays the CPS Transaction Processed Date from the most recently loaded ISIR. This date changes with each ISIR transaction.
Inst Date (institution date)	Displays the date when the Institution loaded the most recent ISIR for the student. This date changes with each new ISIR loaded.
Correction Status	Displays the student's current ISIR Correction Status.
Correction Status Date	Displays the date when the student's current ISIR Correction Status was set.

Packaging Status Summary

Package Status	Displays the same data as the Aid Processing Status field on the Packaging Status Summary page.
SAP (satisfactory academic progress)	Displays the same data as the Satisfactory Academic Progress field on the Packaging Status Summary page.
Entrance Interview	Displays the same data as the Loan Entrance Interview Status field on the Packaging Status Summary page. **Note:** The Entrance Interview field displays when the Financial Aid Installation default for Loan Counseling Version is *Simple.*
Exit Interview	Displays the same data as the Exit Interview field on the Packaging Status Summary page. **Note:** The Exit Interview field displays when the Financial Aid Installation default for Loan Counseling Version is *Simple.*

Note: If the Installation default for Loan Counseling Version is *Expanded*, details regarding the student's Entrance Interview and Exit Interview loan counseling data are presented in a separate Loan Counseling Status section after the Comments section.

Checklists

Item Code	Displays the Checklist Item Code being tracked. If hyperlinked, click the hyperlink to open the Person Checklist Management page for this Item Code. If you receive an error or the Item Code does not appear as a hyperlink, you do not have permission to view Person Checklist Management.
Status	Displays the status of the checklist item: Values are *Initiated* or *Completed.*

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Communications

Method	Displays the type of communication such as letters, email, phone calls, personal contact, facsimiles, and so on.
Direction	Displays the direction of the communication. For example, the communication is outgoing.
Letter Code	Displays a code associated with the context and function selected for this communication.
Context	Displays the Communication Context for this Communication. If the field is hyperlinked, click the hyperlink to open the Person Communication Management page for this Communication Context. If you receive an error or the Context does not appear as a hyperlink, you do not have permission to view Person Communication Management.
Unsuccessful Outcome	When checked, indicates the communication was unsuccessful.
Outcome Reason	Displays the reason the communications outcome was unsuccessful.

Comments

Category	Displays the business need with which this comment is associated.
Comment Date	Displays the date when the comment is entered.
Entered By	Displays who entered the comment.

Loan Counseling Status

This section appears if the Installation Default for Loan Counseling Version is *Expanded*. Displays the same information as the Loan Counseling data page, but in display-only mode.

See Managing Loan Counseling Data.

FA Term Information

Displays the term, description, career, academic plan, NSLDS loan year, and Term Source for all built terms for this aid year.

Student Groups

Group Name	Displays a student group such as *Athletes.*

Note: You must have either Inquiry or Update access to the Student Group for this to display

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Edit Messages

Term	Displays the term with which the Message is associated.
Msg Type (message type)	Displays Message Type. Values are *Error*, *Informtnl* (informational), and *Warning*.
Msg Action (message action)	Displays the current action taken on the edit message. Values are *None Taken*, *Pending*, and *Resolved*. Edits set to a resolved status do not hold financial aid disbursements.
Date Completed	Displays the date that the Message Action field was set.
Msg Code (message code)	Displays the Message Code. If the field is hyperlinked, click the hyperlink to open the Maintain User Edit Messages. If you receive an error or the Message Code does not appear as a hyperlink, you do not have permission to view Maintain User Edit Messages.
Comments	Click the View link to view Edit Messages Comments. If you receive an error or the Message Code does not appear as a hyperlink, you do not have permission to view Maintain User Edit Messages Comments.

Links

Pell Information	Links to the same information as the PELL link on the Packaging Status Summary page.
Request Counselor Action	Click to access the Request Counselor Action page.
Financial Aid Awarded	Link appears when the student has one or more financial aid awards. Click to access the Financial Aid Awards page and view the student's financial aid awards.
Perkins MPN Required	Click to access the Perkins MPN page to view MPN information and loan history. **Note:** The system displays Perkins MPN Required without a link if the system determines that a Perkins MPN is required and a Perkins MPN record does not exist.

Managing Aggregate Aid

To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete history when determining aid eligibility. Financial Aid provides several options and methods to maintain aggregate aid to ensure that Packaging adheres to eligibility requirements and award limits.

NSLDS data can be used to update aggregate aid system tables. For more information,

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See Setting Up Aggregate Aid.

See Using NSLDS Data and Processes.

This section discusses how to:

- Update aggregate aid.
- Assign aggregate sources.

Pages Used to Manage Aggregate Aid

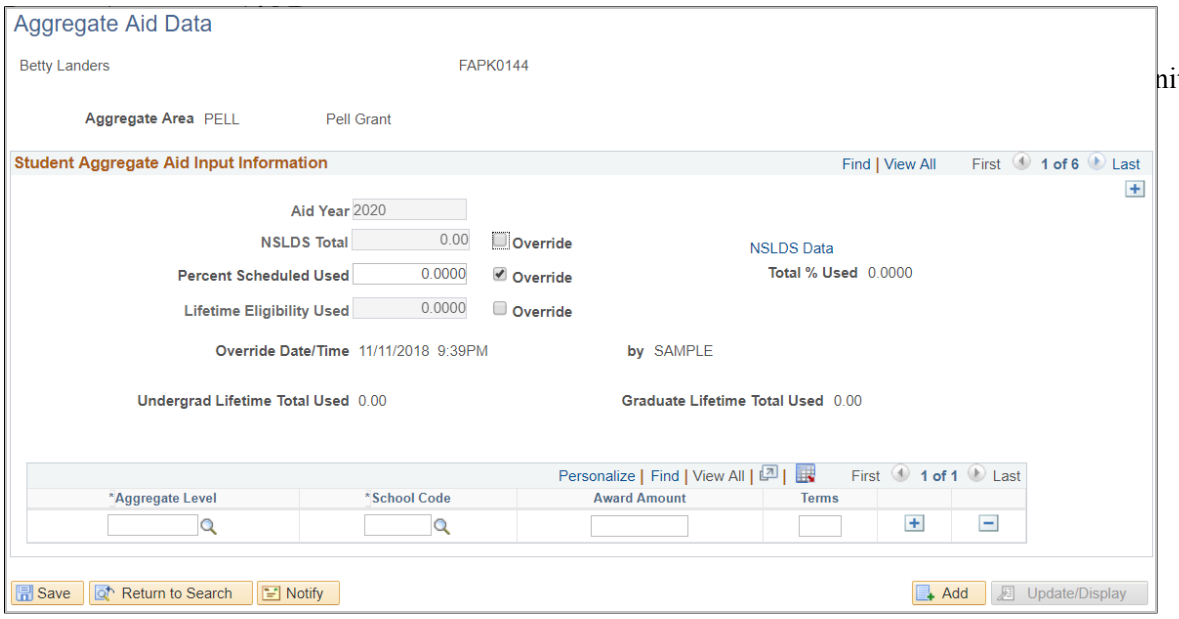
Page Name	*Definition Name*	*Navigation*	*Usage*
Aggregate Aid Data	STDNT_AGGR_INPUT	Financial Aid > Awards > Aggregates > Update Incoming Aggregates > Aggregate Aid Data	View or update lifetime total amounts for each aggregate area.
Aggregate Source	SFA_RUN_SETAGGRSRC	Financial Aid > Awards > Aggregates > Assign Aggregate Source > Aggregate Source	Set the aggregate source to assess a student's lifetime aggregate aid history during the Awarding and Packaging process.

Updating Aggregate Aid Information

Bundle 53

Added Aggregate Area to the search criteria for the Aggregate Aid Data page. Updated screenshot in documentation.

Access the Aggregate Aid Data page (Financial Aid > Awards > Aggregates > Update Incoming Aggregates > Aggregate Aid Data).



This page displays the student's aggregate aid data by Aggregate Area and allows the entry of data byAggregate Area and Aid Year. In addition to manual update, the data displayed on this page can be updated by the internal NSLDS Push process. The Packaging Aggregate Source and type of aggregate area determine how the elements that appear on this page are used in the packaging process.

Two major award limit checks are performed during the packaging process:

- The Lifetime limit check uses the total fields that the Packaging Aggregate Source Indicator designates:
  - If the Packaging Source is NSLDS, then the NSLDS Total amounts are used to identify the amount of lifetime limit expended.
  - If the Packaging Source is PS (PeopleSoft), then the Undergrad and Graduate Lifetime Total Used amounts are used to identify the amount of lifetime limit expended.
- The Annual limit check, regardless of Packaging Source, always assesses any aggregate level detail entered for the aid year being packaged.

NSLDS Total

Displays the aggregate total that has been loaded and pushed from NSLDS tables. You can override this value to enter lifetime totals that are applicable to the context aid year.

Note: As of Aid Year 2010, NSLDS Total is not used in the calculation of Pell awards.

NSLDS Undergrad Total

Applicable only for the aggregate area defined as a federal TEACH grant. NSLDS Undergrad Total is calculated during the aggregate push routine, by summing applicable NSLDS transactions by TEACH program and academic levels 0 – 5. You can override this value to enter lifetime totals that are applicable to the context year.

NSLDS Grad Total

Applicable only for the aggregate area defined as a federal TEACH grant. NSLDS Grad Total is calculated during the aggregate push routine, by summing applicable NSLDS transactions by TEACH program and academic levels 6 – 7. You can override this value to enter lifetime totals that are applicable to the context aid year.

Override (override for NSLDS Total)

Select this check box to override the NSLDS Total field value. If an override is performed, the date/time stamp and operator ID is captured.

NSLDS Data

Click this link to view detailed NSLDS data that has been loaded to the student's record. A link appears for aggregate areas that have a valid NSLDS aggregate cross-reference.

Percent Scheduled Used

Displays the percentage of a student's Pell Grant Maximum (Max) Scheduled Award used at prior institutions from NSLDS or, if overridden, manually populated by the user. Valid values are 000.0 to 200.0. The field can exceed 100.0 when a student has received the Max Scheduled Award for first Pell Grant

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(Pell1) plus a partial or Max Scheduled Award for second Pell Grant (Pell2) at prior institutions. Packaging always uses the Percent Scheduled Used as part of its Pell eligibility determination regardless of the designated Aggregate Source (NSLDS or PS).

Override(override for Percent Scheduled Used)

Select this check box to manually override the Percent Scheduled Used field value.

Total % Used

Displays the sum of Percent Scheduled Used and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 200.0.

Note: The system uses these internal fields (not displayed on any pages) to calculate Total % Used: Max Scheduled Award (full-time, full-year Pell Grant award based on Pell COA and EFC), and student's remaining Pell Grant eligibility (Max Scheduled Award minus Percent Scheduled Used).

Lifetime Eligibility Used

Displays the student's Pell Grant Lifetime Eligibility Used as a percentage.

Valid values are 0000.0000 to 9999.9999. This field is populated by the Aggregate Push routine and can be manually overridden by the user.

Override(override for Lifetime Eligibility Used)

Select this check box to manually override the Lifetime Eligibility Used field value.

Undergraduate Lifetime Total

View lifetime totals from all undergraduate grade levels. The amount is updated as a result of the Awarding and Packaging process. It includes any external award amounts entered on this page for the corresponding aid year. Used when Packaging Aggregate Source = PS.

Graduate Lifetime Total

View lifetime totals from all graduate grade levels. The amount is updated as a result of Awarding and Packaging process. It includes any external award amounts entered on this page for the corresponding aid year. The student's undergraduate total may also be included, depending on whether the aggregate area has cumulative or distinct lifetime limits. Used when Packaging Aggregate Source = PS.

Cumulative: The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. For example, if the student's undergraduate amount is 20,000 USD and the graduate amount is 40,000 USD, then the student cannot receive more than 40,000 USD for this aggregate area.

Distinct: The undergraduate and graduate limits are tracked separately. For example, if the student's undergraduate amount

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	is 20,000 USD and the graduate amount is 40,000 USD, then the student can receive up to 60,000 USD for this aggregate area.
Aggregate Level	Select an aggregate level that corresponds with the external award data entered for the student.
School Code	Select a school code that corresponds with the external award data entered for the student.
Award Amount	Enter the amount of the expected award that corresponds with the external award data entered for the student.
Loans	Click to access the Aggregate Loan Data page and enter loan and lender information for CommonLine loans.

Assigning Aggregate Sources

Access the Aggregate Source page (Financial Aid > Awards > Aggregates > Assign Aggregate Source > Aggregate Source).

To assess a student's lifetime aggregate aid history, Aggregate Source directs the Awarding and Packaging processes to use either the NSLDS aggregate totals or system generated undergraduate lifetime and graduate lifetime totals. You can set the aggregate source at the financial aid installation default level and on the Packaging Status Summary page, in addition to each of the award page components. This option permits you to assign the aggregate source value in batch for an individual student, all students, or a subset of students. The batch assignment process updates the aggregate source value on the student's Packaging Status Summary page.

Institution	Select the institution for which you want to create a request file.

Population Selection

All Students	Select to request that the aggregate source value established on FA Installation Defaults be used for all students for the selected aid year.
Students in List	If you select this option, a grid displays that permits you to enter a list of student IDs.
Use Query	If you select this option, a Select Query button appears. When you click the button, the system displays a standard Select Query lookup page. You should enter the full or partial name of the query as a search key because the prompt goes through the entire list of available queries in the database. Because the Batch Inform File requires certain fields in a particular order, you can only use queries that return the required fields. A baseline query (SFA_AGGR_SOURCE) is delivered that you can use to create a population of students. Minor changes to the query may be required to suit your institutional needs. You can also define your own query using Peoplesoft Query Manager. We

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recommend that you use SFA_AGGR_SOURCE as a model or template.

Aggregate Source

FA Installation Default	Select to assign a value of *Default* to the Aggregate Source on the Packaging Status Summary page.
NSLDS Total	Select to assign a value of *NSLDS* to the Aggregate Source on the Packaging Status Summary page.
PS Aggregates	Select to assign a value of *PeopleSoft* to the Aggregate Source on the Packaging Status Summary page.

Using Mass Change for Packaging Status Attributes

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.

You might sometimes want to change the value of a field on the Packaging Status Summary page for a group of students. Mass Change makes this possible. Mass Change definitions for the ED Verification Status and Satisfactory Academic Progress (SAP) fields are included with your system. You can create additional Mass Change definitions for other fields on the Packaging Status Summary page that you want to change. The process for changing packaging status attributes using Mass Change requires four steps.

This section discusses how to:

- Select students.
- Review selected students.
- Move students into financial aid batch update.
- Update packaging status attributes.

Related Links

"Understanding Mass Change in Campus Solutions" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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Pages Used to Use Mass Change for Packaging Status Attributes

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Mass Change Selection	FA_SAA_REVIEW_MC	Financial Aid > Federal Application Data > Select SAP/Verification (MC) > Review Mass Change Selection	Review the students selected by the Mass Change select process before moving on to the next step.
Update Student Aid Attribute	PRCSRUNCNTL	Financial Aid > Federal Application Data > Update SAP/Verification Status > Update Student Aid Attribute	Update the Packaging Status Attributes table after you have moved the selected students to the Financial Aid Batch Update area.

Selecting Students

To change the value of a packaging status attribute for a group of students, the first step is to select the students for whom you want the attribute changed. Use a Mass Change definition to select students. Two Mass Change definitions exist in the system for your use. FA-Verification Status Select is used for changes to the ED Verification Status field, and FA-Sat Acad Progress Select is used for changes to the Satisfactory Academic Progress field. You must create Mass Change definitions for changes to other packaging status attributes.

After you have completed the Mass Change definition, execute the Mass Change Select process using the Run Mass Change page. This process places information about the selected students in a temporary table.

Reviewing Selected Students

Access the Review Mass Change Selection page (Financial Aid > Federal Application Data > Select SAP/Verification (MC) > Review Mass Change Selection).

Students Selected Displays the number of students selected by the Mass Change select process.

New Setting of Indicator and **Will be** Displays the field that Mass Change changes and the new value of the field.

Status These status codes are delivered as part of PeopleTools. You can define how you use these statuses in your Mass Change routine. You can remove students from the selection by making their status *Cancel* or by deleting the row.

Approved: Not applicable in this process.

Cancel: Use this status code if you want to eliminate a student from the mass change.

Error: Indicates that the Mass Change process encountered an error when attempting to move the student into the Financial Aid Update record.

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	Pending: Indicates that the Mass Change process moved this student into the Financial Aid Batch Update area. *Successful:* Indicates that the Mass Change process moved the student into the Financial Aid Batch Update record.
Cur Val (current value)	Displays the current value of the field to be changed.

Moving Students into Financial Aid Batch Update

In this step, you run a Mass Change to move the selected and reviewed students from the temporary table used in the selection process into the Financial Aid Batch Update area so the packaging status attributes can be changed. You use a Mass Change definition for this step. Two Mass Change definitions exist in the system for your use: FA-Verification Status Update for changes to the ED Verification Status field, and FA-Sat Acad Progress Update for changes to the Satisfactory Academic Progress field. You must create Mass Change definitions for changes to other packaging status attributes. You must run this Mass Change process because the FA-Upd Stdnt Aid Attr Tbl process (FASAAUPD) you run next looks for data in the Financial Aid Batch Update area, not in the temporary table.

After you have completed the Mass Change definition, run the Mass Change Selection using the Run Mass Change page.

Updating Packaging Status Attributes

Access the Update Student Aid Attribute page (Financial Aid > Federal Application Data > Update SAP/ Verification Status > Update Student Aid Attribute).

Run the FA-Upd Stdnt Aid Attr Tbl (financial aid - update student aid attribute table) process (FASAAUPD) to update packaging status attributes.

Awarding Restricted Aid

This section provides an overview of restricted aid and discusses how to:

- Enter a student's restricted aid.
- Enter committee comments.
- Enter committee member comments.
- Evaluate a student's restricted aid.

Understanding Restricted Aid

Restricted aid includes awards such as scholarships, fellowships, and institutional or private funds with subjective eligibility requirements. Restricted aid does not refer to federal monies. The restricted aid pages enable you to monitor the process of awarding restricted aid from the application process through committee evaluation and ranking, to the final decision for the award. The requirements for each type of restricted aid are defined in the Restricted Aid Table component.

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The process for awarding restricted aid involves the following steps.

1. Enter the student being evaluated for restricted aid on the Restricted Aid page.

   You must enter the Restricted Aid ID. You must also enter values in the App Method (application method) and Application Date fields.

2. The committee members use the Restricted Aid Evaluations page to enter their ratings for each of the criteria for the student.

   View each student's overall rating by the committee and by individual committee members using the Committee Detail page and Evaluator Detail page. You can access both of these pages from links on the Restricted Aid page.

3. After all committee members have evaluated the student, the committee makes a final decision on whether to offer the student the restricted aid and how much to offer the student.

   After the final decision has been made, enter the final decision, the decision date, the amount offered to the student (if appropriate), and any comments on the Restricted Aid page.

4. For students who have been awarded the restricted aid, you must manually enter the restricted aid award on the award entry pages.

   If departmental employees are entering the restricted aid award, consider providing them with access to the Manual Student Packaging page only.

Related Links

Awarding Online

Setting Up Restricted Aid

Pages Used to Award Restricted Aid

Page Name	*Definition Name*	*Navigation*	*Usage*
Restricted Aid	STDNT_RSTRC_AID1	Financial Aid > Awards > Restricted Aid > Make Award > Restricted Aid	Enter or view information about the student's application for a restricted aid award.
Committee Detail	STDNT_RSTRC_AID2	Click Committee Detail on the Restricted Aid page.	Enter committee comments, view details about the committee, and review the committee's comments.
Evaluator Detail	STDNT_RSTRC_AID3	Click the Member Detail link on the Committee Detail page.	Enter committee member comments on the student. View each committee member's overall rating for the student as well as information about the committee member.
Restricted Aid Evaluations	STDNT_RSTRC_AID4	Financial Aid > Awards > Restricted Aid > Evaluate Ratings > Restricted Aid Evaluations	Enter ratings from each member of a restricted aid evaluation committee.

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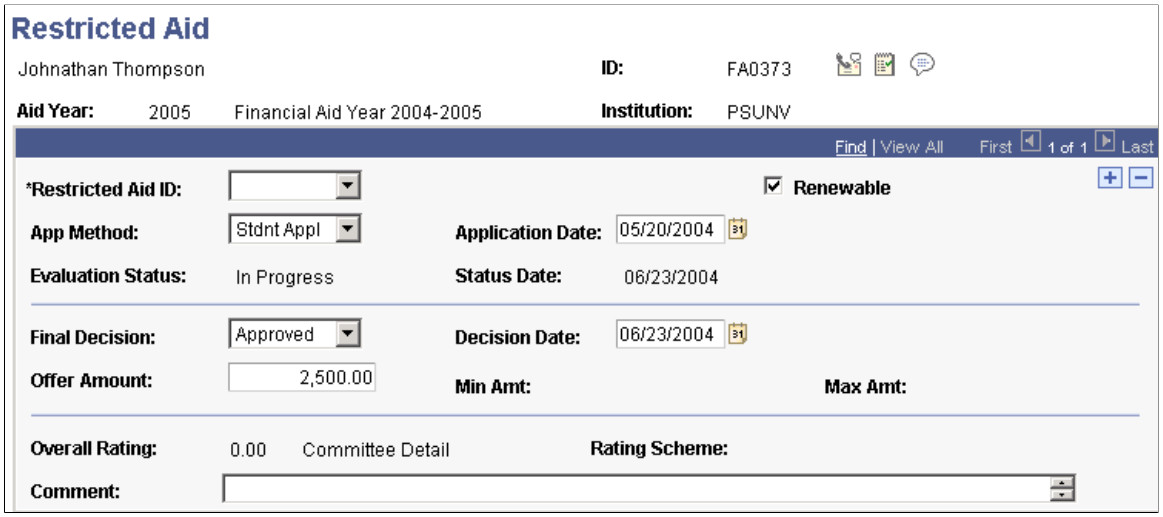
Entering a Student's Restricted Aid

Access the Restricted Aid page (Financial Aid > Awards > Restricted Aid > Make Award > Restricted Aid).

Image: Restricted Aid page

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



Use the information on this page when you enter the restricted aid award for the student on the Student Aid Package page or Manual Student Packaging page.

Complete the following fields—from the top section of the page—at the time that a student applies for a restricted aid award.

Restricted Aid ID	Select the award for which you are considering the student. The values are the restricted aid awards you set up on the Restricted Aid Table component.
Renewable	Select to indicate that a student can renew this restricted aid award from year to year. The system automatically selects the check box based on the information that you used when you set up the restricted aid award, but you can change it on this page.
App Method (application method)	Indicate how the student applies for the award. *External:* The evaluation process is external to the institution, such as an award from a community group. *Met Crit* (met criteria): The student meets certain criteria and therefore becomes eligible for evaluation. For example, students may be eligible for an honors scholarship from a department if the students have a GPA of 3.75 or more. A student who meets the GPA criteria is then considered for the award. *Referral:* The student was referred for consideration for the award.

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Stdnt Appl (student applied): The student submits an application for the restricted aid award.

Application Date Enter the date that the student submitted heir application or the date that you identified the student as a possible recipient for the restricted aid, depending on the application method.

Evaluation Status and **Status Date** Displays the current status of the restricted aid evaluation process for the student, as of the displayed date.

In Progress: This is the default value. It indicates that one or more committee members are still evaluating the student.

Complete: All committee members have completed their review of the student, and changed their status to *Complete* on the Restricted Aid Evaluations page.

After the student has been evaluated, complete the rest of the page with information about the final decision.

Final Decision The final decision made by the restricted aid award committee for the student.

Alternate: The student is an alternate for the restricted aid award.

Approved: The student is approved to receive the restricted aid award.

Denied: The student does not receive the restricted aid award.

Eligible: The student is eligible for the restricted aid award, and there may be other criteria that the student must pass before receiving the restricted aid award.

See Note: Additional explanation regarding the final decision is provided in the Comments field at the bottom of the page.

Decision Date The date that you enter the final decision. This field is automatically populated with the current date, but you can override this date.

Offer Amount Enter an amount, within the minimum/maximum range, that the student is to receive for the restricted aid award.

Min Amt (minimum amount) The lowest amount that you can award for this restricted aid award. The value that you set up on the Restricted Aid Detail 2 page appears by default.

Max Amt (maximum amount) The highest amount that you can award for this restricted aid award. The value that you set up on the Restricted Aid Detail 2 page appears by default.

Overall Rating The average of the member rating values for each member of the committee. The Member Rating field can be viewed on the

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	Restricted Aid Evaluations page and is calculated by averaging the value of the components that are used in the evaluation process. This field does not display a value until the evaluation status for each member of the committee is *Complete.*
Committee Detail	Click this link to access the Committee Detail page and view details about the committee and review the committee's comments.
Rating Scheme	The review process used to evaluate the student. The value you set up on the Restricted Aid Detail 2 page appears by default.
Comment	Enter additional information or explain a final decision of *See Note.*

Entering Committee Comments

Access the Committee Detail page (click the Committee Detail link on the Restricted Aid page).

Committee	The name of the committee that reviews this restricted aid award. If more than one committee reviews this restricted aid award, use the scroll arrows to view other committees.
Committee Type	Identifies the purpose of the committee. This is established when the committee is created and is display only information on this page.
Evaluation Status	The current status of the student's evaluation for this restricted aid award. All committee members must have an evaluation status of *Complete* before an overall rating can be calculated for the student.
Status Date	The date when the displayed evaluation status became effective.
Committee Rating	The student's rating for this restricted aid award, which is the average of the ratings of all the committee members.
Member Detail	Click this link to access the Evaluator Detail page and view each committee member's overall rating for the student as well as information about the committee member. You can also enter any comments from the committee member about the student.
Committee Comments	Enter any comments that the committee wants to make about the awarding of this restricted aid to the student. This field is informational only.

Entering Committee Member Comments

Access the Evaluator Detail page (click the Member Detail link on the Committee Detail page).

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Evaluator ID	Displays the ID of the committee member whose information is displayed. Use the scroll arrows to view information from other committee members.
Role	The role that the committee member fulfills on this committee. For example, the individual could be the chair, a staff member, or a student member.
Evaluation Status and **Status Date**	The current status of the member's evaluation of the student for this restricted aid award and the date that the displayed evaluation status became effective.
Member Rating	The average of the numerical ratings assigned to each of the components evaluated by the committee, as entered on the Restricted Aid Evaluations page. The committee should determine what values to use for its rating scheme.
Comment	Any overall comments this committee member has about the student. You enter the member's comments on this page, not the Restricted Aid Evaluations page.

Evaluating a Student's Restricted Aid

Access the Restricted Aid Evaluations page (Financial Aid > Awards > Restricted Aid > Evaluate Ratings > Restricted Aid Evaluations).

This page can be used by committee members or an administrative assistant to enter information, and then can be viewed by others who might need to review the information.

Rating information and comments can be added for each component that is evaluated. For example, the committee might review an essay, extracurricular activities, and the student's GPA to decide if the restricted aid should be awarded to the student. The essay, extracurricular activities, and GPA are all components.

Rating Scheme	The review process used to evaluate the student. The value that you set up on the Restricted Aid Detail 2 page appears by default.
Member Rating	Displays the calculated average of the values assigned to all components. For example, if three components are to be evaluated, the values entered for each component are added together and divided by three. If one of the three values is zero, the total is still be divided by three.
Evaluation Status	Indicates the current status of this committee member's evaluation of the student. *In Progress:* This is the default value. It indicates that the committee member is still evaluating the student. *Complete:* The committee member has completed his or her review of the student.

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Component	Indicates what is being evaluated, such as an essay, the student's extracurricular activities, or a letter of recommendation. Components are translate values that are set up in PeopleSoft Recruiting and Admissions.
Type	Indicates whether the component considers only one factor or is based on several components. Component types are useful for informational and reporting purposes. *Individual:* The component is an individual component—it considers only one factor, whether that is an essay, interview, or extracurricular activities. *Cumulative:* The component is made up of other components, such as an overall rating.
Value	Enter the numeric rating value that the member wants to assign to the Component.
Rating Comments	Enter any comments about the rating, if appropriate.

Related Links

"Setting up Applicant Evaluation" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

"Setting Up Student Response" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

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