

CS: Local Configuration Guide - Financial Aid - SAP Configurations

Purpose: This document is a sub-set of Local Configurations excerpted from the larger Financial Aid Configuration Guide and is specific to local configurations associated with Satisfactory Academic Progress monitoring. This guide explains necessary tables needed to set up an institution in the PeopleSoft system.

Audience: Financial Aid staff responsible for maintaining local configuration, Financial Aid SAP Processors, Campus Solutions Business Analysts

💡 For more information on managing the Satisfactory Academic Progress business process, please refer to the [SAP Business Processing Guide](#).

For more information on running the SAP Processes, please refer to the ctcLink Reference Center section dedicated to guides on processing [FA SAP](#).

SAP Define Set Up Criteria

The **Define SAP Set Up Criteria** 'component' (a set of pages/tabs that shares a single navigation) is comprised of 5 pages (tabs) used to establish the standard rules for determining a Satisfactory Academic Progress (SAP) status for eight tests. Each test is activated with a check box. The rules are designed to be failure rules, meaning if a student's actual test value matches a configured rule, the test fails. If a student's actual test value does not meet a configured rule, the student receives the **Career Pass Default Status** code for that test defined in the SAP Setup.

The component is Effective Dated, which enables a college to make changes that apply as of the effective date while retaining previous rows to chronicle the history of changes.

The sections in this guide detail what is locally configurable on each of the pages within the SAP **Define Set Up Criteria** component. For better processing performance, keep the rules as simple as possible

The following links can be used to skip ahead to a specific SAP test.

1. [Academic Standing](#)
2. [Maximum Attempted Units](#)
3. [Maximum Attempted Terms](#)
4. [Minimum Current GPA](#)

5. [Minimum Cumulative GPA](#)
6. [Current Earned Units](#)
7. [Cumulative Earned Units](#)
8. [Two Year GPA](#)

⚠ Before modifying SAP configurations, it is always recommended to first add a new Effective Dated row by selecting the '+' button. Before resuming batch processing, it is always best to test configuration changes in a test environment to ensure that the program is working as expected.

Setup Page

Use the **Setup** page on the SAP **Define Set Up Criteria** component to establish the **Status Codes, Severity**, and **Default SAP Status** values for the Academic Institution and Academic Career.

When the SAP process is run either by individual student or in batch using the process scheduler, SAP is processed based on the configuration settings defined. The process generates a SAP Status update to the satisfactory academic progress value on the Student SAP page, showing the results of each active test. Upon completion of the process, the highest severity SAP status code(s) from those active tests run will become the final SAP Status and appears on the Student SAP page and on the student's Packaging Status Summary page.

Student SAP

Term

Program

Plan

Calc SAP Status

Override SAP Status

Packaging Status Summary

Comments

ACADM

LASDTAA

MEET

Meeting Satis Acad Progress

Academic

Academic Transfer DTA

Meets SAP

View Packaging Status Summary

Updated

User ID

SAP Calculation Results

Test	Used	Actual	Rule Range From	To	Failed	Status	Severity	Exception Used	Term
Academic Standing	N		NA	NA	<input type="checkbox"/>			NA	
Maximum Attempted Units	N				<input type="checkbox"/>			N	NA
Maximum Attempted Terms	N				<input type="checkbox"/>			N	NA
Minimum Current GPA	Y	4.000			<input type="checkbox"/>	MEET	10	N	NA
Minimum Cumulative GPA	N	3.790			<input type="checkbox"/>			N	NA
Current Earned Units	Y	5.000			<input type="checkbox"/>	MEET	10	N	NA
Cumulative Earned Units	N				<input type="checkbox"/>			N	NA
Two Year GPA	Y	3.790			<input type="checkbox"/>	MEET	10	N	NA

8 SAP Tests

SAP Status as a result of each SAP test used with the corresponding Severity Level. The SAP Status with the highest Severity Level becomes the Calc SAP Status value, which is used in the Statuses and Actions evaluation, if enabled. Otherwise, it is stored as the final "Calc SAP Status" value.

Define Set Up Criteria

CS Security

Setup Criteria1 Criteria2 Exclusions Communications and Checklists

Academic Institution WA

Academic Career UGRD Undergraduate

Set Up Activation Active

SAP Setup Find | View All First 1 of 1 Last

*Effective Date 10/05/2022

SAP Process Type

*SAP Process Type Term

Status Codes Personalize | Find | View All 1-5 of 13 Last

Calc Status	Severity	Short Description	Description	SAP Status
1 EXHS	75	EXHS	Exhausted Elig-Calculated	Not Meeting Satis Acad Prgrs
2 FLOV	90	FLOV	Failed Override-Calculated	Not Meeting Satis Acad Prgrs
3 MAXT	65	MAXT	Maximum Timeframe Exceeded	Not Meeting Satis Acad Prgrs
4 MAXW	20	MAXW	Maximum Timeframe Warning	Meeting Satis Acad Progress
5 MEET	10	MEET	Meets SAP	Meeting Satis Acad Progress

Default SAP Status

No Prior Academic History Default Status MEET

Undetermined Default Status UNKN

Career Pass Default Status MEET

Exception Fail Default Status FLOV

Zero Earned Units Default Stat ZERO

1 - Set Up Activation

The **Set Up Activation** field defines whether the SAP setup is active or inactive for the **Institution** and **Academic Career**, which impacts whether the SAP field is editable on the Packaging Status Summary page for a student.

When an Academic Institution has any Academic Career set to **Active** on the Setup Activation Field, the Satisfactory Academic Progress value on a student's Packaging Status Summary page is set to display only and there will be a SAP Details link.

When an Academic Institution has all Academic Careers set to **Inactive** on the Setup Activation Field, or if Academic Careers are not defined, the Satisfactory Academic Progress value on a student's Packaging Status Summary page is editable and the SAP Details link is not shown.

No SAP processes (online, batch, or simulation processes) will run successfully for student SAP records in Academic Careers with a **Setup Activation Field** value of **Inactive**.

Setup Criteria1 Criteria2 Exclusions Communications and Checklists

Academic Institution WA

Academic Career UGRD Undergraduate

Set Up Activation Active

Packaging Status Summary

Aid Year 2023 2022-2023 Financial Aid Year ID [redacted] WA [redacted]

EFC Status Official TERM ISIR Information Database Matches Need Summary PELL Calculation Override

Counselor [redacted]

Academic Career UGRD Undergraduate

Aid Processing Status Applied

Aid Application Status Application Active for All Aid

Review Status Incomplete

INST Verification Status Non Select

Verification Flag Not Required

Verification Status Not Selected

Scholarship Status Not Evaluated

*Aid Packaging Method Not Packaged

Packaging Plan ID [redacted]

Repackaging Plan ID [redacted]

Aggregate Source FA Installation Default

Aggregate Source Used [redacted]

College Financing Plan Group [redacted]

Save Return to Search Previous in List Next in List Notify

*Satisfactory Academic Progress Not Meeting Satisfactory Academic Progress SAP Details

Disbursement Hold [redacted]

Loan Counseling Status

SAP Status on the student Packaging Status Summary page

Award Notification

Self Service

Awarding Access Use Filter Options

☒ Inquiry Access

☐ External Award Access

☐ Limited Pell Grant Indicator

2 - Effective Date

In the **SAP Setup** section colleges can make Effective Dated changes that apply as of a specific date. To view prior effective dated rows, ensure that either the **Include History** button (recommended) or **Correct History** button at the bottom of the page is selected. Select the **View All** link to the side of the Effective Date or navigate through each row by selecting the left and right arrow navigation options. This can help in researching what may have happened due to a previous configuration setting when attempting to triage a student record with a confusing SAP history, especially if there have been changes over time in the staff managing this configuration over time at your college.

⚠ Before modifying SAP configurations, it is always recommended to first add a new Effective Dated row by selecting the '+' button.

SAP Setup

Find | View All First 1 of 1 Last

→ *Effective Date 10/05/2022

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

Correct History

Expert Entry

Setup | Criteria1 | Criteria2 | Exclusions | Communications and Checklists

Select "Include History" (recommended) or "Correct History" button to display all effective dated rows on Define Set Up Criteria.

3 - SAP Process Type

Under the **SAP Setup** section, in the **SAP Process Type** subsection, set the **SAP Process Type** field to either **Term** (recommended) or Aid Year.

- **Term** (recommended) - Processing is for a single term, which is defined on the Define Evaluation Term page.
- **Aid Year** - Processing is for multiple terms, which is defined on the Define Evaluation Aid Year page.

SAP Setup

Find | View All

First

1 of 1

Last

*Effective Date 10/05/2022

SAP Process Type

*SAP Process Type Term

4 - Status Codes

Under the **SAP Setup** section, in the **Status Codes** subsection, establish the SAP **Calc Status** codes and their **Severity**, **Description(s)**, and **SAP Status** (outcome) values.

Status Codes

Personalize | Find | View All

First

1-5 of 13


Last

Calc Status	Severity	Short Description	Description	SAP Status
1 EXHS	75	EXHS	Exhausted Elig-Calculated	Not Meeting Satis Acad Prgrs
2 FLOV	90	FLOV	Failed Override-Calculated	Not Meeting Satis Acad Prgrs
3 MAXT	65	MAXT	Maximum Timeframe Exceeded	Not Meeting Satis Acad Prgrs
4 MAXW	20	MAXW	Maximum Timeframe Warning	Meeting Satis Acad Progress
5 MEET	10	MEET	Meets SAP	Meeting Satis Acad Progress


- **Calc Status** - This section establishes the four-character codes used in the Default SAP Status sub-section below it, the calculated status for each test evaluation, and the overall satisfactory academic progress status for the Statuses and Actions rules test (defined on the Criteria 1 tab). It is important that your SAP status codes are relevant and define your student population. Colleges can define their own SAP codes; it is not required that these be

globally defined, but be sure you have a code that represents a passing status, such as MEET.

- **Severity** - Enter a number to control the priority order of Status Codes. Be sure to leave a small gap in the numbering in case you later decide to add a Calc Status code that ranks between two existing status values. The Severity enables prioritization of the SAP Status Codes and will determine the Calc SAP Status code for a student if the student has differing Calc Status results (code) each of the 8 SAP Tests that a college chooses to have actively run when SAP processes.
 - *The code with the highest severity number becomes the (final) Calculated SAP Status code.*
- **Short Description** - Enter a brief description of the Calc Status code.
- **Description** - Enter a detailed description of the Calc Status code.
- **SAP Status** - From the drop-down menu, select one of the pre-defined (translate) values to associate with each Calc Status. This status appears in the Satisfactory Academic Progress field on the student's **Packaging Status Summary** page. Two options are available:
 - Not meeting Satisfactory Academic Progress
 - Meets Satisfactory Academic Progress

 If the new Solution Design is approved to resolve the issue of S & P Grades triggering a failure to meet the Minimum Current GPA a new SAP Status value of "NGPA" will be recommended to add to this Status Code value set. If this code is not added when/if the customized solution is in place the system will default to the **Undetermined Default Status** value outlined in the configuration below.

Keep in mind that when/if the "NGPA" value is added, a corresponding entry will also be needed in the [Statuses and Actions section](#) to ensure a prior term's SAP Status of "NGPA" can properly compare to the current Calculated SAP Status.

 When establishing or maintaining (in a new effective dated entry), be sure that each Severity number is unique and that the most severe Status Code has the highest Severity number assigned to it.

Packaging Status Summary

Aid Year: [] Financial Aid Year: [] ID: []
 Institution: []
 EFC Status: [] Official: [] TERM: [] ISIR Information: [] Database Matches: [] Need Summary: [] PELL: [] Calculation Override: []

Counselor: []
 Academic Career: UGRD [] Undergraduate
 Aid Processing Status: Applied []
 Aid Application Status: Application Active for All Aid []
 Review Status: Review Complete []
 INST Verification Status: Non Select []
 Verification Flag: Not Required []
 Verification Status: Not Selected []

Satisfactory Academic Progress [] Meeting Satis Acad Progress []
 Disbursement Hold: []
 Loan Counseling Status: []

SAP Details

Scholarship Status: Not Evaluated []
 *Aid Packaging Method: Counselor Packaged []
 Packaging Plan ID: FA-WI-SP [] Fall/Winter/Spring
 Repackaging Plan ID: []
 Aggregate Source: FA Installation Default []
 Aggregate Source Used: []
 College Financing Plan Group: SHOPGRP01 [] Shopping Sheet Group 1

Award Notification

Self Service

Awarding Access: Allow Access []
☒ Inquiry Access
☒ External Award Access
☐ Limited Pell Grant Indicator

Save Return to Search Notify

5 - Default SAP Status

Under the **SAP Setup** section, in the **Default SAP Status** subsection, set the **Calc Status** values that align with the intended 'Default' status the SAP Processing programming logic will use when it meets the condition listed.


Default SAP Status

No Prior Academic History Default Status: MEET []
 Undetermined Default Status: UNKN []
 Career Pass Default Status: MEET []
 Exception Fail Default Status: FLOV []
 Zero Earned Units Default Stat: ZERO []

Each field has a specific programming behavior that triggers its application to a student's SAP Status. Select the appropriate code established in the Status Code section above that aligns to the intent of the program.

- **No Prior Academic History Default Status** - If a student does not have any prior student career term record data, this default status is assigned.
- **Undetermined Default Status** - If a calculation cannot be determined for a student due to missing information, this default status is assigned to both the specific test and as the Overall Calculated SAP Status. Examples of missing information are:
 - No Special GPA when the Use Special GPA Code option is selected.

- Academic Standing is blank.
- There is no cumulative or current GPA.
- **Career Pass Default Status** - If a student does not meet the rules defined for a particular test, this status is assigned. If a student has been evaluated for other tests but has no fail statuses for those tests, this default status is assigned as the final Calc SAP Status.
- **Exception Fail Default Status** - If any career, term, or aid year exceptions exist on a student's Maintain Student SAP Data page and the test fails using these exceptions, then this default status is assigned. The process always checks for student-specific exceptions first, which are maintained on the Maintain Student SAP Data page, Exceptions tabs).
 - If the student has exceptions defined and the process does not fail using those exceptions, it then assigns the **Career Pass Default Status** and the test stops evaluating, bypassing other existing student data normally used for the test.
- **Zero Earned Units Default Status** - If a student's earned units is equal to 0 for either the **Current Earned Units** or **Cumulative Earned Units** calculation, this default status is assigned.

 It is recommended that the SAP Code associated with the Exception Fail Default Status default be set to the highest severity of the "Not Meet" status codes.

Criteria 1 Page

Use the **Criteria 1** page (tab) in the SAP **Define Set Up Criteria** component to configure **Statuses and Actions** rules (used for Pass 1 evaluations) and to define rules for the Quantitative Tests: **Academic Standing**, **Max Attempted Units**, and **Max Attempted Terms**.

The screenshot shows the 'SAP Setup' configuration page. At the top, there are tabs for 'Setup', 'Criteria1', 'Criteria2', 'Exclusions', and 'Communications and Checklists'. Below these, the 'Academic Institution' is set to 'WA' and 'College' is selected. The 'Academic Career' is set to 'UGRD'. The 'Effective Date' is '04/30/2019'. There are 'Expand All' and 'Collapse All' buttons. The 'Statuses and Actions' section is highlighted with a callout '6'. It contains a checkbox 'Use Statuses and Actions' which is checked. Below this is the 'Statuses and Actions Rules' table. Callout '7' points to the 'Academic Standing Test' section, which has a checkbox 'Use Academic Standing Test' which is unchecked. Callout '8' points to the 'Maximum Attempted Units Test' section, which has a checkbox 'Use Max Attempted Units Test' which is checked. Below this is the 'Max Attempted Units Option' section with checkboxes for 'Towards GPA', 'No GPA', 'Course Credit', 'Test Credit', 'Other Credit', and 'TC Units Adjust'. Callout '9' points to the 'Maximum Attempted Terms Test' section, which has a checkbox 'Use Max Attempted Terms Test' which is unchecked. The 'Max Attempted Units Rules' table is also visible at the bottom.

Previous SAP Status	Calc SAP Status	Final SAP Status		
EXHS	WARN	2SUS	+	-
FLOV	WARN	2SUS	+	-
MAXT	WARN	SUSP	+	-
PLAN	WARN	SUSP	+	-
PROB	WARN	SUSP	+	-

Academic Program	Academic Plan	Attempted MAX Units From	Attempted MAX Units To	SAP Status		
ACADM		113.001	999.999	MAXT	+	-
PRFTC		113.001	999.999	MAXT	+	-
PRFTC	AASASAF	116.001	999.999	MAXT	+	-
PRFTC	AASASC	64.001	999.999	MAXT	+	-
PRFTC	ATBATAA	115.001	999.999	MAXT	+	-

6 - Statuses and Actions

The Statuses and Actions functionality compares the Student SAP Status from the previous term to what the program is currently calculating as the highest severity SAP Status from all active tests, and results in a Final SAP Status as configured in the rules setup. The Statuses and Actions rules feature is always executed for the Pass 1 online process (Calculate SAP button on the Maintain Student SAP Data page) and is an option when running the SAP Process in batch. This configuration is only used during a Pass 1 evaluation, which applies to students who have no breaks in enrollment between the SAP term currently being calculated and the previously evaluated term. It is not used for a Pass 2 evaluation for students with a break in enrollment between the previously enrolled term and the current term being evaluated.

To activate this functionality, check the **Use Statuses and Actions** box and the configuration section will appear.

The program compares the configured Previous SAP Status to the SAP Status of the previously calculated term. It then checks the configured Calc SAP Status value against the SAP Status with the highest severity level calculated on the current term being evaluated. If those match one of the established rules in this configuration, then the SAP Status for the current term being evaluated will be set to the Final SAP Status in that particular rule setup.

When planning out the configuration of rules colleges must take into account which consecutive SAP statuses should result in an alternate, likely more punitive status than when taking a single term into account. Make sure that all possible desired scenarios are accounted for. If the SAP process cannot find a rule match for the Previous SAP Status and Calc SAP Status values in the

configuration, then the final SAP Status will be the status with the highest severity level from the active SAP tests used in the evaluation.



Fields in the Statuses and Actions setup section:

- **Previous SAP Status** - The SAP Status for the most recently calculated term or aid year status value to be evaluated.
- **Calc SAP Status** - The calculated SAP Status with the highest severity level for all tests used in the current term being evaluated.
- **Final SAP Status** - The resulting SAP Status to be set for the current evaluation term or aid year if a student's Previous SAP Status and Calc SAP Status match the values selected in this row.

Statuses and Actions


☒ Use Statuses and Actions

Statuses and Actions Rules

Personalize | Find | View All |  

First 6-10 of 13 Last

Previous SAP Status	Calc SAP Status	Final SAP Status		
PROB	SUSP	SUSP	+	-
PROB	WARN	SUSP	+	-
SUSP	MEET	MEET	+	-
SUSP	WARN	SUSP	+	-
WARN	WARN	SUSP	+	-



Statuses and Actions rules are only evaluated for Pass 1 processing at this time; however colleges are seeking an enhancement to enable the use of this configuration even for students who have a break in enrollment and would trigger a Pass 2 calculation.

7 - Academic Standing Test Configuration

The Academic Standing rules allow colleges to designate the Academic Standing values in the CS Core area that can trigger a SAP Status change in Financial Aid. To activate this test, check the **Use Academic Standing Test** box and the configuration section for this test will appear.

Academic Standing rules are configured by **Academic Career**, **Academic Program**, and **Academic Plan**. They are intended to identify students who are not meeting Academic Standing and may be ineligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing Academic Standing statuses and non-passing SAP Statuses. Leaving the Academic Program and Plan blank will assess all Program/Plans within that career. If a rule match is not found, the student is assigned the **Career Pass Default Status** code.

Fields in the Academic Standing Test setup section:

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule will be used for all students with that Academic Program and the Academic Career selected for this SAP Setup Criteria.
- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.
- **Academic Standing** - Select an Academic Standing status in the context of the Academic Program and Academic Plan, if selected, to associate with a SAP Status. If blank or a row for the term does not exist, the Undetermined Default Status code is used.
- **SAP Status** - Select the SAP Status to use if the Academic Standing value from Student Records matches this setup.

Academic Standing Test
☒ Use Academic Standing Test

Academic Standing Rules

Academic Program	Academic Plan	Academic Standing	SAP Status
<input type="text"/>	<input type="text"/>	FSUS	ACAD

Academic Program and Academic Plan can be used or can be left blank to assess all in that career.

Enter SAP Status that reflects a failure to meet SAP. The SAP Status Code must exist on the Setup tab under Calc Status codes before it can be added here. This value should have a SAP Status of Not Meeting SAP.

CS Security | **Statuses and Actions**

Setup | Criteria1 | Criteria2 | Exclusions | Communications and Checklists

Academic Institution: WA
 Academic Career: UGRD Undergraduate

SAP Setup
 Effective Date: 12/22/2022

Statuses and Actions
☒ Use Statuses and Actions

Statuses and Actions Rules

Previous SAP Status	Calc SAP Status	Fin
EXHS	FLEX	EX
EXHS	MEET	ME
EXHS	SUSP	EX
EXHS	WARN	EX
FLEX	WARN	SU

Academic Standing Test
☒ Use Academic Standing Test

Academic Standing Rules

Academic Program	Academic Plan	Academic Standing
<input type="text"/>	<input type="text"/>	FSUS

Maximum Attempted Units Test
☐ Use Max Attempted Units Test

Maximum Attempted Units Option

Maximum Attempted Transfer Unit Criteria

☐ Towards GPA ☐ No GPA ☐ Course Credit

☐ Test Credit ☐ Other Credit ☐ TC Units Adjust

Maximum Attempted Terms Test
☐ Use Max Attempted Terms Test

Look Up Academic Standing

Academic Institution: WA
 Academic Career: UGRD
 Academic Standing Action: begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results
 View 100 First 1-18 of 18 Last

Academic Standing Action
DICX
DISC
DISQ
DISX
FSUS
GOOD
PRBC
PRCX
PROB
PROX
SUCX
SUSC
SUSP
SUSX
WARN
WARX
WRCX
WRNC

Use of Academic Standing is effective only if your college maintains institution Academic Standing and has configured Academic Standing Action values that are actively maintained for your student population.

8 - Maximum Attempted Units Test Configuration

The Maximum Attempted Units test defines the maximum units a student can attempt before their SAP Status is affected. To activate this test, check the **Use Max Attempted Units Test** box and the configuration section for this test will appear. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and non-passing SAP Statuses. This test configuration is comprised of two parts: Maximum Attempted Transfer Unit Criteria and Max Attempted Units Rules.

! Students whose transcripts were not converted, but were manually built, will not have Course Exclusions for Remedial Coursework identified and excluded for their Attempted Units by this process, since those manually built transcript records are not being accounted for in the student enrollment record.

Maximum Attempted Units Test

☒ Use Max Attempted Units Test

Max Attempted Units Option

Maximum Attempted Transfer Unit Criteria

☒ Towards GPA ☒ No GPA ☒ Course Credit
☒ Test Credit ☒ Other Credit ☒ TC Units Adjust

Max Attempted Units Rules

Personalize | Find | View All | First 1-5 of 85 Last

Academic Program	Academic Plan	Attempted MAX Units From	Attempted MAX Units To	SAP Status		
ACADM		135.001	999.000	MAXT	+	-
ACADM	BUCBUA	135.001	999.000	MAXT	+	-
ACADM	CHEBCA	142.501	999.000	MAXT	+	-
ACADM	EECCEA	150.001	999.000	MAXT	+	-
ACADM	GEBBIAS	135.001	999.000	MAXT	+	-

Max Attempted Units Option

By default, the Maximum Attempted Units test only counts the units attempted at the institution and does not include any transfer units. The total units attempted at the institution are summed from student enrollment, counting units that are within and prior to the term or aid year being processed. The SAP process uses either the Units Taken value or, if that value is zero, the Financial Aid Progress Units value from the student's enrollment to gather this sum of units attempted at the institution. In order for the units to be included for the most recent term, the student must be enrolled in the maximum term past the fully graded date. Audited units are not counted.

If Course Exclusions are set up on the [Exclusions page \(tab\)](#) and the student is enrolled or has enrollment history in any of the defined courses, then those units are subtracted from the attempted unit calculation up to the maximum values set on that page.

The transfer units are then added to that sum from Student Career Term (Term History) based on the Maximum Attempted Transfer Unit Criteria selection (the options selected by checking each box) on the SAP Setup.

You can select any or none of the following options for including transferred units in the attempted units calculation:

- **Towards GPA** - Counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- **No GPA** - Counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- **Course Credit** - Counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- **Test Credit** - Counts test credit units that have been matriculated for the term prior to or including the term being processed.
- **Other Credit** - Counts other credit units that have been matriculated for the term prior to or including the term being processed.
- **TC Units Adjust** - Reduces the Maximum Attempted Units Total by the Transfer Credit Adjustments amount on the Student Career Term table for any term prior to or including the term being processed.

Max Attempted Units Option

Maximum Attempted Transfer Unit Criteria

<input checked="" type="checkbox"/> Towards GPA	<input checked="" type="checkbox"/> No GPA	<input checked="" type="checkbox"/> Course Credit
<input checked="" type="checkbox"/> Test Credit	<input checked="" type="checkbox"/> Other Credit	<input checked="" type="checkbox"/> TC Units Adjust

💡 If no transfer unit options are selected, then the Maximum Attempted Units test only includes units attempted at the institution.

Max Attempted Units Rules

The Max Attempted Units Rules setup should cover the entire range of units by Academic Career; by Academic Career and Academic Program; or by Academic Career, Academic Program, and Academic Plan. If no rule match is found, the student is assigned the **Career Pass Default Status** code. The ranges and statuses that are set here are to find students who are not making progress.

Fields in the Max Attempted Units Rules setup section:

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule will be used for all students with that Academic Program and the Academic Career selected for this SAP Setup Criteria.
- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.
- **Attempted MAX Units From** - Enter the starting number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the starting number, it is included in the range.
- **Attempted MAX Units To** - Enter the ending number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the ending number, it is included in the range.
- **SAP Status** - Select the SAP status code to use when the student's attempted units value falls within the range of this rule.

Max Attempted Units Rules						Personalize Find View All		First	1-5 of 85	Last
Academic Program	Academic Plan	Attempted MAX Units From	Attempted MAX Units To	SAP Status						
ACADM		135.001	999.000	MAXT						
ACADM	BUCBUA	135.001	999.000	MAXT						
ACADM	CHEBCA	142.501	999.000	MAXT						
ACADM	EECCEA	150.001	999.000	MAXT						
ACADM	GEGBIAS	135.001	999.000	MAXT						

The **Attempted Max Units From** and **Attempted Max Units To** fields create a range of numbers applied to the Max Attempted Units rule. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans.

9 - Maximum Attempted Terms Test Configuration

The Maximum Attempted Terms test is based on the number of attempted terms by Academic Career, as indicated by the Student Enrollment record. This test defines the maximum terms a student can enroll in before their SAP status is affected. The configuration rules setup can establish different maximum term ranges and corresponding SAP Status for colleges with short and long term programs that might have different term maximums.

The ranges of terms and the corresponding configured SAP Statuses that are set here are to find students who are not making progress. Students who meet the rules set up are considered to fail this test, so write the rules with failing ranges and non-passing SAP statuses. To activate

this test, check the **Use Max Attempted Terms Test** box and the configuration section for this test will appear.

Maximum Attempted Terms Test

☒ Use Max Attempted Terms Test

▼ **Max Attempted Terms Rules** Personalize | Find | View All | [Grid Icon] | [Print Icon] First 1 of 1 Last

Academic Program	Academic Plan	MAX Terms From	MAX Terms To	SAP Status		
<input type="text"/>	<input type="text"/>	<input type="text" value="15"/>	<input type="text" value="99"/>	<input type="text" value="EXHS"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

A term is counted if units are taken, Enrollment Status is "enrolled" for the term, and at least one course in that term is not audited.


A term is **not** counted if the student either completely drops or audits all courses in that term.

If a student has a career-specific exception on the Maintain Student SAP Data page, that is evaluated first.

The rules setup should cover the entire range of units by Academic Career; by Academic Career and Academic Program; or by Academic Career, Academic Program, and Academic Plan. If a rule match is not found, the student is assigned the **Career Pass Default Status** code. The ranges and statuses set here are to find students who are not making progress.

The Max Attempted Terms Rule values function as outlined below:

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule will be used for all students with that Academic Program and the Academic Career selected for this SAP Setup Criteria.
- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.
- **Max Terms From** - Enter the starting number for the range of terms that a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the starting number, it is included in the range.
- **Max Terms To** - Enter the ending number for range of terms a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.
- **SAP Status** - Select the SAP status code to use when the student's attempted terms value falls within the range of this rule.

 The **Max Terms From** and **Max Terms To** fields allow for the configuration of a range of number values applied to the Maximum Attempted Terms rule. Ensure that the numbers do not overlap with each other or with a range in another row that defines a

different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans.

! Students whose transcripts were not converted, and instead were manually built, will **not** be identified by this process as having exceeded the maximum terms of enrollment, since those manually built transcript records are not being accounted for in the student enrollment record.

Criteria 2 Page

Set up rules for Qualitative Tests: **Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA.**

The screenshot displays the 'Criteria2' configuration page in the SAP system. The page is titled 'SAP Setup' and includes tabs for 'Setup', 'Criteria1', 'Criteria2', 'Exclusions', and 'Communications and Checklists'. The 'Criteria2' tab is active, showing a list of criteria with columns for 'Academic Program', 'Academic Plan', 'Cum Earned Units From', 'Cum Earned Units To', 'Min Cur GPA From', 'Min Cur GPA To', and 'SAP Status'. The 'Effective Date' is 02/06/2023. The 'Find' button is visible, and the 'View All' button is highlighted. The 'Expand All' and 'Collapse All' buttons are also present. The 'Minimum Current GPA Test' is selected, and the 'Use Min Current GPA Test' checkbox is checked. The 'Minimum Cumulative GPA Test' is also selected, and the 'Use Min Cumulative GPA Test' checkbox is checked. The 'Current Earned Units Test' is selected, and the 'Use Current Earned Units Test' checkbox is checked. The 'Cumulative Earned Units Test' is selected, and the 'Use Cumulative Earned Units Test' checkbox is checked. The 'Two Year GPA Test' is selected, and the 'Use Two Year GPA Test' checkbox is checked. The 'Current Earned Units Option' is set to 'Use Completed Units'. The 'Cumulative Earned Units Options' are set to 'Use Percentage'. The 'Cumulative Earned Units Rules' are configured with various criteria, including 'Cumulative Attempted Transfer Unit Criteria' and 'Cumulative Earned Transfer Unit Criteria'. The 'Two Year GPA Rules' are also configured with various criteria.

10 - Minimum Current GPA Test

The Minimum Current GPA test determines the lowest current GPA that a student can have and still be eligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and non-passing SAP statuses. To activate this

test, check the **Use Min Current GPA Test** box and the configuration section for this test will appear.

This test evaluates both the student's Current GPA and Cumulative Earned Units. The Cumulative Earned Unit value used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead, the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

Minimum Current GPA Test

☒ Use Min Current GPA Test

Use Special GPA Code


Minimum Current GPA Rules

Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	MIN Cur GPA From	MIN Cur GPA To	SAP Status
<input type="text"/>	<input type="text"/>	0.001	999.000	0.001	1.999	WARN
<input type="text"/>	<input type="text"/>	0.001	999.000	0.000	0.000	SUSP

Cumulative Earned Units and Current GPA Calculations

A **Special GPA Code** (not currently used by colleges) can be selected to use a student's Special GPA for comparison in SAP processing.

If a Special GPA Code is **not** selected, the student's **Current GPA** is used instead and is compared to the setup rules. If a student has an aid-year or term-specific exception on the Maintain Student SAP Data page, that is evaluated first.

 Colleges are currently not using the Special GPA functionality. If the Special GPA field is populated in the Minimum Current GPA Test configuration, but does not exist, the Undetermined Default Status code will be used.


Minimum Current GPA Rules

The Minimum Current GPA Rules setup should cover the entire range of units by Academic Career; by Academic Career and Academic Program, or by Academic Career, Academic Program, and Academic Plan. If no rule match is found, the student is assigned the **Career Pass Default Status** code. The ranges and statuses that are set here are used to find students who are not making progress.

The Minimum Current GPA Rules values function as outlined below:

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule will be used for all students with that Academic Program and the Academic Career selected for this SAP Setup Criteria.

- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.
- **Cum Earned Units From** - Enter the units value of the range of cumulative earned (passed) units to identify the minimum GPA range used to determine which SAP status should be used.
- **Cum Earned Units To** - Enter the units value of the range of cumulative earned (passed) units to identify the maximum GPA range used to determine which SAP status should be used.
- **MIN Cur GPA From** - Enter the minimum value of the range of minimum current GPA used to determine the SAP status.
- **MIN Cur GPA To** - Enter the maximum value of the range of minimum current GPA used to determine the SAP status.
- **SAP Status** - Select the SAP status code to use if a student meets the rules of this test.

 The **Cum Earned Units From** and **Cum Earned Units To** fields and the **MIN Cur GPA From** and **MIN Cur GPA To** fields allow for the configuration of a range of number values applied to the Minimum Current GPA rule. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans.

11 - Minimum Cumulative GPA Test

The Minimum Cumulative GPA test evaluates both the student's Cumulative GPA and Cumulative Earned Units. The Minimum Cumulative GPA test examines whether a student's Cumulative GPA falls within the specified GPA range in relation to the specified range of Cumulative Earned Units. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and non-passing SAP statuses. To activate this test, check the **Use Min Cumulative GPA Test** box and the configuration section for this test will appear.

If a student has an Aid Year-Specific or Term-Specific Exception, that is evaluated first. If a student has a Career-Specific Exception, that is evaluated second. Otherwise, the program will use the rules defined in setup.

Minimum Cumulative GPA Test

☒ Use Min Cumulative GPA Test

Use Special GPA Code

Minimum Cumulative GPA Rules Personalize | Find | View All | First 1 of 1 Last

Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	Minimum CUM GPA From	Minimum CUM GPA To	SAP Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Cumulative Earned Units and Cumulative GPA Calculations

The **Cumulative Earned Units** value in this test used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead, the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

A **Special GPA Code** (not recommended) can be selected to use a student's Special GPA for comparison in SAP processing.

The **Cumulative GPA** is used by default if a Special GPA Code is **not** selected. The Cumulative GPA value is determined from the Student Career Term record (Cumulative Statistics tab of the Term History page). This is the Total Overall GPA including transfer units from student career term, and is pulled from the most recent enrollment term that has passed the fully graded date for that term. If the student has had a break in enrollment between the most recent enrollment term and the current SAP term being calculated, then program does not look to the Fully Graded Date, and pulls the Cumulative GPA value from the most recent term previous to the term being calculated.

Term Statistics **Cumulative Statistics** Term Withdrawal Session Withdrawal Academic Standing >

Academic Career: Undergraduate

Institution: College Academic Level - Term End: Sophomore
Term: 2227 FALL 2022 Reset Cum Stats at Term Start: ☐

Enrollments

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load	Units Earned Towards Acad Load	Units Taken For Audit
For GPA	67.000	259.600	3.870	67.000	0.000		67.000	
Not For GPA	0.000			0.000	0.000		67.000	0.000

Transfer Credit


	Graded Units	Grade Points	GPA	Earned Units	Graded Transfer Units GPA / No GPA
For GPA					0.000
Not For GPA					115.000
					Units Adjustment 0.000
					>>> Total Adjusted Transferred Units 115.000

Combined (Enrollment + Transfer Credit Units)

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Combined Earned Units GPA / No GPA
For GPA	67.000	259.600	3.870	67.000	0.000	67.000
Not For GPA	0.000			0.000	0.000	115.000
						Transfer Credit Units Adjustment 0.000
						>>> Total Cumulative Units 182.000

Value used for the Cumulative GPA comparison when the Special GPA box is not checked in the configuration. This includes transfer units from student career term.

Value used for the Cumulative Earned Units comparison.


 Colleges are currently not using the Special GPA functionality. If the Special GPA field is populated in the Minimum Cumulative GPA Test configuration, but does not exist, the Undetermined Default Status code will be used.

Minimum Cumulative GPA Rules

The Minimum Cumulative GPA Rules setup should cover the entire range of units by Academic Career; by Academic Career and Academic Program, or by Academic Career, Academic Program, and Academic Plan. If no rule match is found, the student is assigned the **Career Pass Default Status** code. The ranges and statuses that are set here are used to find students who are not making progress.

The Minimum Cumulative GPA Rules values function as outlined below:

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule will be used for all students with that Academic Program and the Academic Career selected for this SAP Setup Criteria.
- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.
- **Cum Earned Units From** - Enter the units value of the range of Cumulative Earned (passed) units to identify the minimum GPA range used to determine which SAP Status should be used.
- **Cum Earned Units To** - Enter the units value of the range of Cumulative Earned (passed) units to identify the maximum GPA range used to determine which SAP Status should be used.
- **Minimum CUM GPA From** - Enter the minimum value of the range of Minimum Cumulative GPA used to determine the SAP Status.
- **Minimum CUM GPA To** - Enter the maximum value of the range of Minimum Cumulative GPA used to determine the SAP Status.
- **SAP Status** - Select the SAP Status code to use if a student meets the rules of this test.

 The **Cum Earned Units From** and **Cum Earned Units To** fields and the **Minimum CUM GPA From** and **Minimum CUM GPA To** fields allow for the configuration of a range of number values applied to the Minimum Current GPA rule. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans.

12 - Current Earned Units Test

The Current Earned Units test compares the student's Current Earned Units and Current Attempted Units and assigns an SAP Status Code. You can choose to measure by either Percentage (recommended) or Completed Units. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and non-passing SAP statuses. To activate this test, check the Use **Current Earned Units Test** box and the configuration section for this test will appear. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Current Earned Units Test

☒ Use Current Earned Units Test

Current Earned Units Option

Use Percentage

Current Earned Units Rules

Personalize | Find | View All | First 1 of 1 Last

Academic Program	Academic Plan	Cur Attempted Units From	Cur Attempted Units To	Cur Earned Units % From	Cur Earned Units % To	SAP Status	
<input type="text"/>	<input type="text"/>	<input type="text" value="0.000"/>	<input type="text" value="0.000"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>	<div> </div>

Current Attempted Units and Current Earned Units Determinations

The **Current Attempted Units** value used in the comparison for this test is calculated from institutional units only. Units are summed from student enrollment from the aid year or term being evaluated. The process uses the Units Taken value or, if that value is zero, the Financial Aid Progress Units. The student must be enrolled in the maximum term past the fully graded date. Audited units and transfer units are not counted, and Grade Exclusions are not factored in.

The **Current Earned Units** value used in the comparison for this test is calculated in one of two ways.

- If Grade Exclusions are **not** enabled, then the Current Earned Units are calculated as the sum of the values from the total passed with GPA and the total passed without GPA on the Student Career Term table. Earned Transfer Units are included in the values being summed, and can be adjusted through SAP Setup configurations.
- If Grade Exclusions are enabled, then the Current Earned Units are derived from Student Enrollment with transfer units included. Then courses that are on the Grade Exclusions setup are subtracted from the total.

Student Enrollment 1 | Student Enrollment 2 | Student Enrollment 3 | Student Enrollment 4 | Last Enrollment Action

Term: 2022 FALL Career: Undergraduate Institution: [Redacted]

Class Details

*Class Nbr: 15188
 Subject: [Redacted]
 Academic Group: [Redacted]
 Status: [Redacted]
 Action: [Redacted]

Current Attempted Units are first summed from Student Enrollment. These include units are summed from student enrollment from the aid year or term being evaluated. The process uses the Units Taken value or, if that value is zero, the Financial Aid Progress Units.

Component: Lecture
 Class Section: 02HY
 Session: Regular
 Status Date: 09/07/2022
 Program: PRFTC

Grading

☐ Override Grading Basis
 *Grading Basis: GRD Graded
 Grade In/Official: A A Honor
 Repeat Code: [Redacted]

Units

Units Taken: 5.00 Units Earned: 5.00
 Course Count: 1.00 Progress: 5.00
 Billing Units: 5.00 FA Progress: 5.00

Term Statistics | Cumulative Statistics | Term Withdrawal | Session Withdrawal | Academic Standing >

Academic Career: Undergraduate

Institution: [Redacted] Academic Level - Term Start: Sophomore
 Term: 2227 FALL 2022

Enrollments

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load	Units Earned Towards Acad Load
For GPA						15.000	15.000
Not For GPA							0.000

If Grade Exclusions are **not** enabled in the SAP Setup, then the **Current Earned Units** are calculated as the sum of the values from the Total Passed with GPA and the Total Passed Without GPA on the Student Career Term table. Earned Transfer Units are included in the values being summed, and can be adjusted through SAP Setup configurations.

Transfer Credit

	Graded Units	Grade Points	GPA	Earned Units
For GPA	0.000	0.000	0.000	0.000
Not For GPA	0.000			0.000

Graded Transfer Units GPA / No GPA	0.000
For Units Only	85.500
Units Adjustment	0.000
>>> Total Adjusted Transferred Units	85.500

Combined (Enrollment + Transfer Credit Units)

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units
For GPA	15.000	60.000	4.000	15.000	0.000
Not For GPA	0.000			0.000	0.000

Combined Earned Units GPA / No GPA	15.000
Transfer Credit For Units Only	85.500
Transfer Credit Units Adjustment	0.000
>>> Total Term Units	100.500

Student Enrollment 1 | Student Enrollment 2 | Student Enrollment 3 | Student Enrollment 4 | Last Enrollment Action

Term: 2022 FALL Career: Undergraduate Institution: [Redacted]

Class Details Find | View 1 First 1.3 of 3 Last

*Class Nbr: [Redacted] Component: Lecture
 Subject: [Redacted] Class Section: 02HY
 Academic Group: [Redacted] Session: Regular
 Status: [Redacted] Status Date: 09/07/2022
 Action: [Redacted] Program: PRFTC

Grading

☐ Override Grading Basis
 *Grading Basis: GRD Graded
 Grade In/Official: A A Honor
 Repeat Code: [Redacted]

Units

Units Taken: 5.00
 Course Count: 1.00
 Billing Units: 5.00

Units Earned: 5.00
 Progress: 5.00
 FA Progress: 5.00

Note: If Grade Exclusions are enabled in the SAP Setup, then the **Current Earned Units** are derived from Student Enrollment with transfer units included. Then courses that are on the Grade Exclusions setup are subtracted from the total.

Current Earned Units Options

Percentage (Recommended):

Percentage of completed units for the current term or aid year. The program calculates the student's Current Earned Units percentage (Current Earned Units divided by Current Attempted Units) and compares this value to the ranges specified in the Current Earned Units Rules configurations. If the calculated percentage falls within the percentage range and attempted units fall within the attempted units range, the student receives the SAP Status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

Completed Units:

Number of units to be completed for the current term, by term or aid year. The student-specific number is compared to the calculated number (Current Earned Units divided by Current Attempted Units). If the calculated Earned Units fall within the Current Earned Units range and Current Attempted Units fall within the Current Attempted Units range, the student receives the SAP Status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

The Current Earned Units Rules values function as outlined below:

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule will be used for all students with that Academic Program and the Academic Career selected for this SAP Setup Criteria.
- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.

- 💡 It is recommended that colleges select the **Use Percentage** Current Earned Units Option.

The Cumulative Earned Units test compares the student's Cumulative Attempted Units and Cumulative Earned Units and assigns an SAP Status Code. You can choose to measure by either Percentage (recommended) or Completed Units.

Cumulative Earned Units Test

☒ Use Cumulative Earned Units Test

Cumulative Earned Units Options

Use Percentage ▾

Cumulative Attempted Transfer Unit Criteria

☒ Towards GPA
 ☒ No GPA
 ☒ Course Credit
☒ Test Credit
 ☒ Other Credit
 ☒ TC Units Adjust

Cumulative Earned Transfer Unit Criteria

☒ Towards GPA
 ☒ No GPA
 ☒ Course Credit
☒ Test Credit
 ☒ Other Credit
 ☒ TC Units Adjust

▼ Cumulative Earned Units Rules

Personalize | Find | View All | First 1 of 1 Last

Academic Program	Academic Plan	Cum Attempted Units From	Cum Attempted Units To	Cumulative Earned Units % From	Cumulative Earned Units % To	SAP Status		
<input type="text"/>	<input type="text"/>	<input type="text" value="0.000"/>	<input type="text" value="0.000"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>		

Cumulative Attempted Transfer Unit Criteria check boxes

The **Cumulative Attempted Units** are first summed from Student Enrollment. These include units from all terms within and prior to the term or aid year being evaluated. The process uses either the Units Taken value or, if it is zero, the Financial Aid Progress Units value to gather this sum of units attempted at the institution. Audited units and Grade Exclusions in the SAP Setup are not included.

Transfer Units from the Cumulative Statistics page (tab) in the Term History component are then added to the Cumulative Attempted Units calculation based on which check boxes are selected in the Cumulative Attempted Transfer Unit Criteria options in the Cumulative Earned Units Test SAP setup.

For the Cumulative Attempted Transfer Unit Criteria, select the Transfer Unit Criteria check boxes to include them in the Cumulative Attempted Units total.

- **Towards GPA** - Counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- **No GPA** - Counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- **Course Credit** - Counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits. (External credits that apply to the student's degree, but do not count in the student's GPA.)
- **Test Credit** - Counts test credit units that have been matriculated for the term prior to or including the term being processed.
- **Other Credit** - Counts other credit units that have been matriculated for the term prior to or including the term being processed.
- **TC Units Adjust** - Reduces the Cumulative Attempted Units Total by the Transfer Credit Adjustments amount on the Student Career Term table for any term prior to or including the term being processed.

The screenshot displays the SAP interface for a student's enrollment. At the top, there are tabs for 'Student Enrollment 1' through 'Student Enrollment 4' and 'Last Enrollment Action'. Below these, the 'Term' is set to '2022 FALL', 'Career' is 'Undergraduate', and 'Institution' is selected. The 'Class Details' section shows the class number, subject, academic group, status, and action. A text box explains that 'Cumulative Attempted Units' are first summed from Student Enrollment, including units from all terms within and prior to the term or aid year being evaluated. The process uses either the Units Taken value or, if it is zero, the Financial Aid Progress Units value to gather this sum of units attempted at the institution. Audited units and Grade Exclusions are not included. The 'Units' section shows the following values: Units Taken (5.00), Units Earned (5.00), Course Count (1.00), Billing Units (5.00), and FA Progress (5.00). The 'Grading' section includes options for 'Override Grading Basis', 'Grading Basis' (GRD), 'Grade In/Official' (A), and 'Repeat Code'.

Units	Value
Units Taken	5.00
Units Earned	5.00
Course Count	1.00
Billing Units	5.00
FA Progress	5.00

Term Statistics **Cumulative Statistics** Term Withdrawal Session Withdrawal Academic Standing >

Transfer Units from the Cumulative Statistics page (tab) in the Term History component are then added to the **Cumulative Attempted Units** calculation based on which check boxes are selected in the Cumulative Attempted Transfer Unit Criteria options in the Cumulative Earned Units Test SAP setup.

Academic Career:

Institution: Academic Level - Term End: Sophomore
Term 2227 FALL 2022 Reset Cum Stats at Term Start: ☐

Enrollments

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load	Units Earned Towards Acad Load
For GPA	15.000	60.000	4.000	15.000	0.000	15.000	15.000
Not For GPA	0.000			0.000	0.000	0.000	0.000

Corresponds to the Towards GPA check box

Contains the sum of Course Credits, Test Credits, and Other Credits

Transfer Credit

	Graded Units	Grade Points	GPA	Earned Units	Graded Transfer Units GPA / No GPA
For GPA	0.000	0.000	0.000	0.000	0.000
Not For GPA	0.000			0.000	85.500
					Units Adjustment 0.000
					>>> Total Adjusted Transferred Units 85.500

Corresponds to the No GPA check box

Corresponds to the TC Units Adjust check box and subtracts this value from the Cumulative Attempted Units sum

Combined (Enrollment + Transfer Credit Units)

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Combined Earned Units GPA / No GPA
For GPA	15.000	60.000	4.000	15.000	0.000	15.000
Not For GPA	0.000			0.000	0.000	85.500
						Transfer Credit Units Adjustment 0.000
						>>> Total Cumulative Units 100.500

⚠ Due to the method used to manually enter legacy student records into ctcLink, it is **recommended that all boxes are checked in the Cumulative Attempted Transfer Units** option for the Cumulative Earned Units Test in SAP Setup. This will ensure that legacy credits at the institution are included in this calculation. Unchecking these boxes could result in a negative impact to the student's Pace of Progression assessment.

Cumulative Earned Transfer Unit Criteria check boxes

The **Cumulative Earned Units** value is calculated in one of two ways.

- If Grade Exclusions are **not** enabled, then the Cumulative Earned Units are calculated as the sum of the For GPA Earned Units and Not for GPA Earned Units in the Enrollment + Transfer Credit Units section in the Cumulative Statistics tab of Term History. It looks at the maximum term that is less than or equal to the SAP processing term that has active enrollment and is fully graded. It excludes units with grades with the Audit Grading Basis selected in the Enrollment table.
- If Grade Exclusions are enabled, then the Cumulative Earned Units are derived from Student Enrollment with transfer units included. Then courses that are on the Grade Exclusions setup are subtracted from the total.

For the Cumulative Earned Transfer Unit Criteria, select the Transfer Unit Criteria check boxes to keep them in the Cumulative Earned Units sum, otherwise they will be reduced from the total.

- **Towards GPA** - Counts earned transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- **No GPA** - Counts earned transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- **Course Credit** - Counts earned transfer units that have been matriculated for the term prior to or including the term being processed as course credits. (External credits that apply to the student's degree, but do not count in the student's GPA.)
- **Test Credit** - Counts earned test credit units that have been matriculated for the term prior to or including the term being processed.
- **Other Credit** - Counts other earned credit units that have been matriculated for the term prior to or including the term being processed.
- **TC Units Adjust - *Subtracts*** earned Transfer Credit Adjustments from the Cumulative Attempted Units total that have been entered for any term prior to or including the term being processed.

Term Statistics

Cumulative Statistics

Term Withdrawal

Session Withdrawal

Academic Standing

>

1 of 1

View All

Academic Career:

Undergraduate

3 of 3

View All

Institution:

Academic Level - Term End:

Sophomore

Reset Cum Stats at Term Start:

Term

2227

FALL 2022

Enrollments

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load	15.000
For GPA						Units Earned Towards Acad Load	15.000
Not For GPA						Units Taken For Audit	0.000

If Grade Exclusions are **not** enabled in the SAP Setup, then the **Cumulative Earned Units** are calculated as the sum of the For GPA Earned Units and Not for GPA Earned Units in the Enrollment + Transfer Credit Units section in the Cumulative Statistics tab of Term History. It looks at the maximum term that is less than or equal to the SAP processing term that has active enrollment and is fully graded. It excludes units with grades with the Audit Grading Basis selected in the Enrollment table.

Transfer Credit

	Graded Units	Grade Points	GPA	Earned Units	Graded Transfer Units For GPA	Graded Transfer Units For No GPA	0.000
For GPA	0.000	0.000	0.000	0.000	For Units Only		85.500
Not For GPA	0.000			0.000	Units Adjustment		0.000
					>>> Total Adjusted Transferred Units		85.500

Combined (Enrollment + Transfer Credit Units)

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Combined Earned Units GPA / No GPA	15.000
For GPA	15.000	60.000	4.000	15.000	0.000	Transfer Credit For Units Only	85.500
Not For GPA	0.000			0.000	0.000	Transfer Credit Units Adjustment	0.000
						>>> Total Cumulative Units	100.500

Student Enrollment 1 | Student Enrollment 2 | Student Enrollment 3 | Student Enrollment 4 | Last Enrollment Action

Term: 2022 FALL Career: Undergraduate Institution: [Redacted]

Class Details Find | View 1 First 1.3 of 3 Last

*Class Nbr: [Redacted] Component: Lecture
 Subject: [Redacted] Class Section: 02HY
 Academic Group: [Redacted] Session: Regular
 Status: Enrolled Reason: Enrolled Status Date: 09/07/2022
 Action: [Dropdown] Reason: [Search]

Grading

☐ Override Grading Basis
 *Grading Basis: GRD Graded
 Grade In/Official: A A Honor
 Repeat Code: [Search]

Units

Units Taken: 5.00
 Course Count: 1.00
 Billing Units: 5.00

Units Earned: 5.00
 Progress: 5.00
 FA Progress: 5.00

If Grade Exclusions are enabled, then the **Cumulative Earned Units** are derived from Student Enrollment with transfer units included. Then courses that are on the Grade Exclusions setup are subtracted from the total.

⚠ Due to the method used to manually enter legacy student records into ctcLink, **it is recommended that all boxes are checked in the Cumulative Earned Transfer Units** option for the Cumulative Earned Units Test in SAP Setup. This will ensure that legacy credits at the institution are included in this calculation. Unchecking these boxes could result in a negative impact to the student's Pace of Progression assessment.

Cumulative Earned Units Options

Percentage (Recommended):

Percentage of completed units up to the most recent and fully graded enrollment term. The program calculates the student's Cumulative Earned Units percentage (Cumulative Earned Units divided by Cumulative Attempted Units) and compares this value to the ranges specified in the Cumulative Earned Units Rules configurations. If the calculated percentage falls within the percentage range and attempted units fall within the attempted units range, the student receives the SAP Status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

Completed Units:

Number of cumulative units to be completed up to the most recent and fully graded enrollment term. The student-specific number is compared to the calculated number (Cumulative Earned Units divided by Cumulative Attempted Units). If the calculated Earned Units fall within the Cumulative Earned Units range and Cumulative Attempted Units fall within the Cumulative Attempted Units range, the student receives the SAP Status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

The Current Earned Units Rules values function as outlined below:

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule will be used for all students with that Academic Program and the Academic Career selected for this SAP Setup Criteria.
- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.
- **Cur Attempted Units From** - Enter the minimum value of the range of Current Attempted Units to identify the minimum percentage or number range used to determine the SAP Status.
- **Cur Attempted Units To** - Enter the maximum value of the range of Current Attempted Units to identify the maximum percentage or number range used to determine the SAP Status.
- **Cur Earned Units % (or Number) From** - Enter the minimum value of the range of Current Earned (passed) percentage or number used to determine the SAP Status.
- **Cur Earned Units % (or Number) To** - Enter the maximum value of the range of Current Earned (passed) percentage or number used to determine the SAP status.
- **SAP Status** - Select the SAP Status code to use if a student meets the rules of this test.

💡 It is recommended that colleges select the **Use Percentage Cumulative Earned Units Option**.

14 - Two Year GPA Test

The Two Year GPA test reviews students who, at the end of their second year, are maintaining at least a C grade point average, that is, a 2.0 or above grade average. This test checks whether a student's current GPA falls within a certain range in relation to a range of attempted terms. If a rule match is not found, the student is assigned the **Career Pass Default Status** code. If the student has zero Completed Units, the **Zero Earned Default Status** is used. The ranges and statuses set here are to find students who are not making progress. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and non-passing SAP statuses. To active this test, check the **Use Two Year GPA Test** box and the configuration section for this test will appear.

Two Year GPA Test

☒ Use Two Year GPA Test

Use Special GPA Code

▼ Two Year GPA Rules

Academic Program

Academic Plan

Terms From

Terms To

Cum GPA From

Cum GPA To

SAP Status

0

0

0.000

0.000

Personalize

Find

View All

1 of 1

Last

+

-

CS: Local Configuration Guide - Financial Aid - SAP Configurations

Page 29


Attempted Terms and GPA Calculations


The **Attempted Terms** are counted by Academic Career from Student Enrollment. A term is counted if units are taken, Enrollment Status is '*Enrolled*', and at least one course in that term is not audited. A term is not counted if the student either completely drops or audits all courses in that term.

A **Special GPA Code** (not recommended) can be selected to use a student's Special GPA for comparison in SAP processing.

The **Two Year Cumulative GPA** is used by default if the Special GPA Code is **not** selected in the configuration. This value is the overall GPA including transfer units from Student Career Term.

- In a **Pass 1** evaluation (for students who have no breaks in enrollment between the SAP term currently being calculated and the previously evaluated term), the cumulative GPA is as of the most recent fully graded term associated with the Aid Year or Term being evaluated.
- In a **Pass 2** evaluation (for students with a break in enrollment between the SAP term currently being calculated and the previously evaluated term), the cumulative GPA is from the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. Pass 2 does not look at the fully graded date.

 Colleges are currently not using the Special GPA functionality. If the Special GPA field is populated in the Minimum Cumulative GPA Test configuration, but does not exist, the Undetermined Default Status code will be used.


 Legacy enrollment data that has been manually entered in ctcLink is not included in the Attempted Terms count, as Attempted Terms only includes those on the Student Enrollment table, and not the student's transcript.

[Note: This item may change if the rested enhancement is implemented in future.]

Two Year GPA Rules (AH Edits - Ready for Review)

In the Two Year GPA Rules setup, you must define the number of terms that equals two years of study at your institution. You can set up rules for any combination of terms and GPA by career, by career and program, or by career, program, and plan. If a rule match is not found, the student is assigned the **Career Pass Default Status** code. The ranges and statuses that are set here are to find students who are not making progress.

- **Academic Program** (Optional) - Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that Academic Career and Academic Program.
- **Academic Plan** (Optional) - Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this Academic Program, Academic Plan, and the Academic Career selected for this SAP Setup Criteria are evaluated for those specific rules.
- **Terms From** - Enter the starting number for the range of terms that a student can attempt for a corresponding SAP Status code. The numbers are inclusive. If 10 is the starting number, it is included in the range.
- **Terms To** - Enter the ending number for range of terms a student can attempt for a corresponding SAP Status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.
- **Cum GPA From** - Enter the beginning value of the range of Cumulative GPA values used to determine the SAP Status.
- **Cum GPA To** - Enter the ending value of the range of Cumulative GPA values used to determine the SAP Status.
- **SAP Status** - Select the SAP Status code to use if a student meets the rules of this test.

 The **Terms From** and **Terms To** fields and the **CUM GPA From** and **CUM GPA To** fields allow for the configuration of a range of number values applied to the Two Year GPA rule. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans.

Exclusions Page

Use the **Exclusions** page (tab) in the SAP **Define Set Up Criteria** component to configure **Course Exclusions**, Financial Aid **Award Exclusions**, and **Grade Exclusions**.

Setup Criteria1 Criteria2 **Exclusions** Communications and Checklists

Academic Institution WA
Academic Career UGRD Undergraduate

SAP Setup Find | View All First 1 of 2 Last
Effective Date 11/01/2021

Course Exclusions
☒ Use Course Exclusions

Max Units to Exclude

Max ESL Units to Exclude
Max Remedial Units to Exclude 45.00

Course Exclusions Personalize | Find | View All | First 1 of 1 Last

*Course ID	*Offer Nbr	*Course Type
<input type="text"/>	<input type="text"/>	Remedial

Award Exclusions
☒ Use Award Exclusions

Award Exclusions Personalize | Find | View All | First 1 of 1 Last

Source	Fin Aid Type	Item Type From	Item Type To
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Grade Exclusions
☒ Use Grade Exclusions

Grade Exclusions Personalize | Find | View All | First 1 of 1 Last

Grading Scheme	*Grading Basis	Grade Input
<input type="text"/>	<input type="text"/>	<input type="text"/>

Course Exclusions

Course Exclusions are used in the [Maximum Attempted Units Test](#) to identify English as a Second Language (ESL) and remedial courses in a student's academic history that should be excluded in the count. The configuration allows for limits to be placed on the number of ESL or remedial credits that can be excluded from the total Attempted Units count in the [Maximum Attempted Units Test](#). To activate this functionality, select the **Use Course Exclusions** box and the configuration section will appear.

Course Exclusions
☒ Use Course Exclusions

Max Units to Exclude

Max ESL Units to Exclude
Max Remedial Units to Exclude 45.00

Course Exclusions Personalize | Find | View 100 | First 1-5 of 1595 Last

*Course ID	*Offer Nbr			*Course Type
013616	1	DP-CS	1	Remedial
013617	1	DP-CS	2	Remedial
013618	1	DP-CS	3	Remedial
013620	1	DP-CS	4	Remedial
013621	1	DP-CS	5	Remedial

Max Units to Exclude


The Max Units to Exclude group box has two configurations.

Max ESL Units to Exclude:

- Enter the maximum number of units to be excluded from the [Maximum Attempted Units](#) test regardless of number attempted. If a student has more ESL Units than the maximum set here, only the maximum number is excluded.
- If no limit exists for the number that can be excluded, leave the field blank.
- There must be at least one course entered with the 'ESL' Course Type in the Course Exclusions grid for this maximum to be invoked.

Max Remedial Units to Exclude:

- Enter the maximum number of units to be excluded from the [Maximum Attempted Units](#) test regardless of number attempted. If a student has more Remedial units than the maximum set here, only the maximum number is excluded.
- If no limit exists for the number that can be excluded, leave the field blank.
- There must be at least one course entered with the 'Remedial' Course Type in the Course Exclusions grid for this maximum to be invoked.

 SBCTC migrated a customization to ctcLink on 4/27/2023 to address an Oracle bug impacting the total Attempted Units value calculated by the [Maximum Attempted Units](#) test. The bug caused the total Attempted Units value to generate a negative number when a student's total Remedial Units exceeded the Max Remedial Units to Exclude configuration value. For more information about the bug and the solution implemented, please see the [Item #3: MAXT with Developmental Credits over 45](#) section in the [FA Satisfactory Academic Progress \(SAP\) Project Information Guide](#).

Course Exclusions Rules

In the Course Exclusions Rules setup section, enter the criteria for excluding Remedial or ESL courses from the [Maximum Attempted Units](#) test.

- **Course ID** - Select the Course ID of the class to exclude from the Maximum Attempted Units test calculation regardless of grade.
- **Offer Nbr** - Select the Course Offer Number of each class to exclude from the Maximum Attempted Units test calculation regardless of grade. To completely exclude the class, the Course Offer Number must be included.
- **Course Type** - Select the type of class, either 'Remedial' or 'ESL'.

Award Exclusions

Award Exclusions criteria are used to exclude students from the selection for an SAP evaluation based on a Financial Aid Type or specific awards. It is the only means by which colleges can fully exclude a student from SAP processing. To activate this feature, select the **Use Award Exclusions** check box.

Award Exclusions

☒ Use Award Exclusions

Award Exclusions				Personalize Find View All		First 1 of 1 Last	
Source	Fin Aid Type	Item Type From	Item Type To				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				

Fields in the Award Exclusions rules:

- **Source** - Select a Fund Source. This field is informational only. There is no system logic using this selection.
- **Fin Aid Type** - Select a Financial Aid Type to exclude students who only have awards with that specific Financial Aid Type from the SAP evaluation selection.
- **Item Type From and Item Type To** - Select the beginning and end of a range of Financial Aid Item Types to exclude students who have awards from only those item types from the SAP evaluation selection.

Grade Exclusions

Grade Exclusions criteria are used to exclude course units with specific Grading Schemes, Grading Bases, and Grade Input Values from the [Current Earned Units](#) and/or [Cumulative Earned Units](#) tests. You must set up any and all course grades that should not be counted toward earned units, including failing grades. To activate this feature, select the **Use Grade Exclusions** check box.

If Grade Exclusions is enabled, the Current Earned Units and Cumulative Earned Units values are derived from the student's enrollment, minus the units to be excluded. If Grade Exclusions is not enabled, the Current and/or Cumulative Units value is derived from the student's Career Term data.


Grade Exclusions

☒ Use Grade Exclusions

Grade Exclusions				Personalize Find View All		First 1 of 1 Last	
Grading Scheme		*Grading Basis		Grade Input			
<input type="text"/>		<input type="text"/>		<input type="text"/>			

Fields in the Grade Exclusions rules:

- **Grading Scheme** - Enter the Grading Scheme to be used to define the Grading Basis and Grade Input for exclusion from the Current Earned Units and/or Cumulative Earned Units tests.
- **Grading Basis** - Enter the Grading Basis to be used to define the Grade Input for exclusion from the Current Earned Units test and/or the Cumulative Earned Units test
- **Grade Input** - Enter the Grade Input to be excluded from the Current Earned Units and/or Cumulative Earned Units tests. If a college has '*In Progress*' grades that they want excluded from SAP evaluation, this is the area where that type of grade can be excluded from SAP consideration.

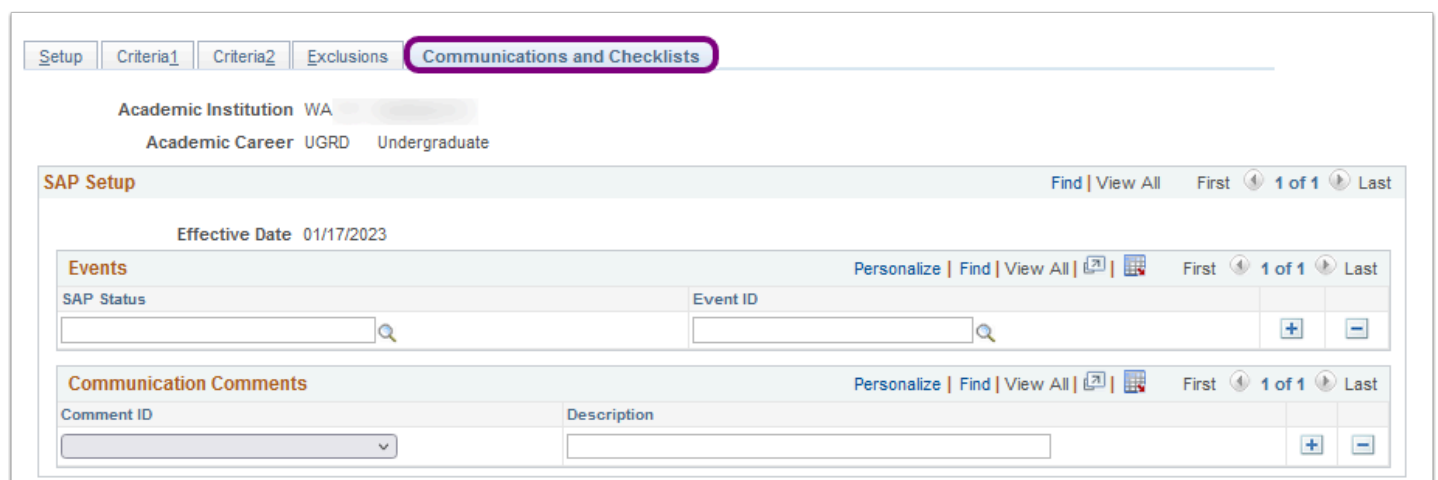
 This functionality is not currently in use by ctcLink colleges.

Communications and Checklists Page


The Create SAP Communications process updates the 3C Trigger table in Campus Community. This process utilizes two Administrative Functions, FINA and FINT, depending on the SAP processing type.

- **Aid Year** processing SAP data requires the use of the **FINA Administrative Function**, which consists of the variable data field of Aid Year.
- **Term** processing SAP data requires the use of the **FINT Administrative Function** which consists of the variable data fields Aid Year and Term.

When setting up SAP Communications in Campus Community each processing type (Aid Year and Term) must have its own separate, unique communications set up. You must set up your communications to use the correct Administrative Function for the processing type; otherwise the 3C Engine does not create the communications correctly.



The screenshot shows the 'Communications and Checklists' tab selected in the SAP Setup section. The page includes fields for 'Academic Institution' (WA) and 'Academic Career' (UGRD). Below these, there are sections for 'Events' and 'Communication Comments', each with search and filter options. The 'Events' section has a search bar for 'SAP Status' and 'Event ID'. The 'Communication Comments' section has a search bar for 'Comment ID' and 'Description'. The page also includes navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last'.

 This functionality is not currently in use by ctcLink colleges.

Events

Fields in the Events configuration:

- **SAP Status** - Select the SAP status code.
- **Event ID** - Select the Event ID. The Event ID contains the Communication and Checklist Code/Item to be assigned and is set up under Campus Community.

Communication Comments

Fields in the Communication Comments configuration:

- **Comment ID** - Select an SAP Test for which you want comments inserted into the 3C Trigger table. Comment ID values are associated with the eight SAP tests. If the Comment ID for a particular test is set up here, the SAP 3C Process generates a comment in the 3C Trigger table by student for each test that the student has failed. If the student fails multiple tests, multiple comments are appended into one comment and inserted into the Communication Comment field on the 3C Trigger table.
- **Description** - Enter the text for the Comment ID in this free-form field to create specific messages to students who fail one of the eight SAP evaluation tests. To include the student's actual failed data value from the Student SAP page in the comment, use the desired Hardcode Variable from the following table when entering the comment text.
- **Comment ID and Variables** - The following table details the Comment ID values, variables, and examples of description entries and resulting comments. The Comment ID values are the same as the field names from the Actual column on the Student SAP page.

Comment ID	Hardcode Variable	Example Description	Example Comment
Academic Standing	ACADSTND	Your current academic standing is ACADSTND.	Your current academic standing is DISQ.
Cumulative Earned Units	CUMERNU	The cumulative unit amount you have earned, CUMERNU, does not meet our requirements.	The cumulative unit amount you have earned, 19.000, does not meet our requirements.
Current Earned Units	CURERNU	CURERNU is the amount of your current earned units.	8.000 is the amount of your current earned units.

Comment ID	Hardcode Variable	Example Description	Example Comment
Max Attempted Terms	MAXTERMS	The number of terms you have attempted at <college> is MAXTERMS.	The number of terms you have attempted at <college> is 10.000.
Max Attempted Units	MAXATTU	You have attempted MAXATTU units at <college>.	You have attempted 12.00 units at <college>.
Min Cumulative GPA	MINCUMGP	Your cumulative GPA is MINCUMGP.	Your cumulative GPA is 1.125.
Min Current GPA	MINCURGP	Your GPA for fall semester is MINCURGP; this does not meet college requirements.	Your GPA for fall semester is 1.013; this does not meet college requirements.
Two Year GPA	TWOYRGPA	Your GPA after two years of study is TWOYRGPA.	Your GPA after two years of study is 1.109.

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria

Security:

- ZC FA Local Configuration
- ZC SACR Financial Aid Config
- ZD SACR Financial Aid Config

Menu: SFA_SAP_FINANCIAL_AID

Component: SFA_SAP_SETUP

Page: Setup Criteria 1 - 2, Exclusions

Action: UD/DA/C

Define Evaluation Terms

Configured for evaluation term processing.

Define Evaluation Terms

Academic Institution WA College
Academic Career UGRD Academic Career

Terms Find | View All First 17 of 20 Last

*Term 2195 SUMMER 2019

Evaluation Terms Personalize | Find | 1 of 1 First Last

*Term	Description
1 2193	SPRING 2019

*Term 2197 FALL 2019

Evaluation Terms Personalize | Find | 1-2 of 2 First Last

*Term	Description
1 2193	SPRING 2019
2 2195	SUMMER 2019

*Term 2201 WINTER 2020

Evaluation Terms Personalize | Find | 1 of 1 First Last

*Term	Description
1 2197	FALL 2019

*Term 2203 SPRING 2020

Evaluation Terms Personalize | Find | 1 of 1 First Last

*Term	Description
1 2201	WINTER 2020

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Evaluation Terms

Security:

- ZC FA Local Configuration
- ZC SACR Config
- ZC SACR Financial Aid Config
- ZD SACR Financial Aid Config

Menu: SFA_SAP_FINANCIAL_AID

Component: SFA_SAP_ET_TRM

Page: SFA_SAP_ET_TRM

Action: UD/DA/C

Self-Service Options

Define self-service inquiry options as well as awarding access and processing options.

[Inquiry](#) | [Awarding](#) | [Loan](#) | [SAP](#) | [Disbursement](#)

Institution **WA** College Aid Year **2020** Copy Self-Service Options

Display Data

<input type="checkbox"/> Allow Access	<input checked="" type="checkbox"/> Award Detail	<input type="checkbox"/> Canceled Awards	<input type="checkbox"/> Award Notification
	<input checked="" type="checkbox"/> Remaining Need	<input checked="" type="checkbox"/> Declined Awards	<input checked="" type="checkbox"/> SAP

*View Data By **Aid Year** *Need Methodology **Federal**

*Summary Link **Summary Page**

Alternate Text

*Summary Link Label **Financial Aid Summary**

*Academic Year Award Period **Academic Year**

*Non-Standard Award Period **Summer Term**

View Award Notification

SAP Link Label

Sort Order

*Term **Ascending**

*Award **Ascending**

[Inquiry](#) | [Awarding](#) | [Loan](#) | [SAP](#) | [Disbursement](#)

Institution **WA** College Aid Year **2020** **2019-2020 Financial Aid Year**

Self Service Award Processing

Access Criteria	Operator	Value	
<input type="checkbox"/> FA Application Status			<h3>Processing Option</h3> <p> <input type="radio"/> Batch <input checked="" type="radio"/> Real time </p>
<input type="checkbox"/> Processing Status			
<input type="checkbox"/> FED Verification Process			
<input type="checkbox"/> INST Verification Process			
<input checked="" type="checkbox"/> Satisfactory Academic Progress	Not Equal	Not Meeting Satis Acad Prgrs	
<input checked="" type="checkbox"/> Award Notification Complete	Equal to		Category FACTGY Context FACNXT Letter

Consumer Information URL **<https://lowercolumbia.edu/financial-aid/index.php>**

Entrance Interview URL **<https://studentloans.gov/myDirectLoan/index.action>**

External Award Reporting

<input type="checkbox"/> Access from Award Inquiry	Alternate Text for Reporting Report Other Financial Aid
<input type="checkbox"/> Access from Accept/Decline	Alternate Text for List View Aid from Other Sources
<input type="checkbox"/> External Award Access	

[Inquiry](#) [Awarding](#) [Loan](#) [SAP](#) [Disbursement](#)

Institution WA College Aid Year 2020 2019-2020 Financial Aid Year

FFELP Lender Section Setup

☐ Display Lender Selection Lender Sort Option Random

Entrance/Exit Counseling Setup

☒ Display Entrance Interview URL
☒ Display Exit Interview URL

General Loan Information

Default Loan Contact URL https://studentloans.gov/myDirectLoan/index.action

Perkins Master Promissory Note

Authentication Method No Authentication Additional References 0

[Inquiry](#) [Awarding](#) [Loan](#) [SAP](#) [Disbursement](#)

Institution WA College Aid Year 2020 2019-2020 Financial Aid Year

General SAP Information

SAP Information URL https://loc.etc.edu/info/webresources/Financial%20Aid%20Forms/Satisfactory-Academic-Progress.pdf

SAP Status Message

[Personalize](#) | [Find](#) | [View All](#) | [1-5 of 5](#) | [First](#) | [1-5 of 5](#) | [Last](#)

SAP Status	Default Status Text	Alternate Status Text	Status Message
Academic Plan	Academic Plan		Please follow SAP and your academic plan. For SAP standa
Not Meeting Satisfactory Academic Progress	Not Meeting Satisfactory Academic Progress	Not meeting SAP standards	Please review Standards of Academic Progress. Please rev
Probation	Probation		Please review Standards of Academic Progress. Please rev
Warning	Warning		Please review Standards of Academic Progress. Please rev
Meeting Satisfactory Academic Progress	Meeting Satisfactory Academic Progress	Meeting SAP standards	Congratulations you have met the Standards of Academic Pr

[Inquiry](#) [Awarding](#) [Loan](#) [SAP](#) [Disbursement](#)

Institution WA College Aid Year 2020 2019-2020 Financial Aid Year

Disbursement Options

☐ Show Amounts ☐ Authorized ☐ Disbursed

Disbursement Status and Date

☐ Show Status and Date
☐ Scheduled ☐ Authorized ☐ Disbursed
☐ Progression
☐ Ignore Authorized
☐ Suppress Date if Passed

Navigation: Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options

Security:

- ZC FA Local Configuration
- ZC SACR Config
- ZC SACR Financial Aid Config

Menu: DESIGN_FINANCIAL_AID2

Component: SS_FA_INSTALL

Page: Inquiry Options, Awarding Options, Loan Options & SAP Options

Action: A/UD

The configuration rules setup can establish different maximum term ranges and corresponding SAP Status for colleges with short and long term programs that might have different term maximums.

Events

SAP Status: Select the SAP status code.

Event ID: Select the event ID. The event ID contains the Communication and Checklist Code/Item to be assigned and is set up under Campus Community.

Communication Comments