

## 9.2 WCG Eligibility Process

**Purpose:** To step through the Washington College Grant eligibility process using ctcLink.

**Audience:** Financial Aid staff.

This document works through the step-by-step process for the entire WCG Eligibility process. Steps are as follows:

**Step 1)** Select WCG Students using Population Update Process

**Step 2)** Calculate Eligibility for WCG-Eligible Students

**Step 3)** *Optional* - Review Eligibility View Page

**Step 4)** Run Archive Outbound Process

**\*Step 5)** Load WSAC's Archive Inbound File

**\*Step 6)** Run a Query to View Eligibility Messages from Archive Process

**Step 7)** *Optional* - Run Eligibility Lock in Batch

**\*Note--** if testing this process, you will not be able to test running Archive Inbound (Step 5 - 6)

**!** You must have at least one of these local college managed security roles:

- ZD FA SNG Eligibility
- ZD SACR Financial Aid Config
- ZZ FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

# Washington College Grant Eligibility Process

❗ Prior to creating and populating the WCG eligibility page, the following processes must occur:

1. ISIRs need to be loaded
2. FA Term records built
3. Student budgets assigned

## Load ISIRs - WCG Population/Update

i Step 1, WCG Population Update, loads data into the SNG eligibility table.

**Navigation:** NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Population/Update

1. The WCG Population/Update search page displays.
2. Enter an existing or **Add A New Value** for the **Run Control ID**.
3. Select the **Search** button.

### WCG Populate/Update

Find an Existing Value   Add a New Value

2

Run Control ID WCG\_POP\_UPD\_KF

3

Add

4. The WCG Populate/Update page displays.
5. From the **Selection Tool** drop-down list choose **PS Query**.
6. From the **Query Name** drop-down list choose: **CTC\_FA\_SNG\_POPULATE**.
7. Select the **Edit Prompts** Link.

## WCG Populate/Update

Run Control ID WCG\_POP\_UPD\_KF

[Report Manager](#)

[Process Monitor](#)

[Run](#)

**Population Selection**

☒ Population Selection

5

Selection Tool

PS Query

6

Query Name

CTC\_FA\_SNG\_POPULATE

7

Edit Prompts

[Launch Query Manager](#)

[Preview Selection Results](#)

**Parameters**

\*Academic Institution:

WA220

Tacoma CC

\*Aid Year:

☐ Recalculate

[Save](#)

8. The Query Prompts pagelet displays.
9. Enter the **Institution**.
10. Enter the **Aid Yr**.
11. Select the **OK** button.

**Query Prompts**

Institution

WA220

Aid Yr

2021

OK

Cancel

12. The WCG Populate/Update page displays.
13. In the **Parameters** group box, enter the **Academic Institution**.
14. Enter the **Aid Year**.
15. \*Optional -- Before running the process, you may check your results using the **Preview Selection Results** link.
16. Select the **Run** button.

## WCG Populate/Update

Run Control ID WCG\_POP\_UPD\_KF      Report Manager      Process Monitor      **16** Run

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**Population Selection**

☒ Population Selection

Selection Tool       Edit Prompts      **15**

Query Name       Launch Query Manager      Preview Selection Results

---

**Parameters**

**13** \*Academic Institution:       Tacoma CC      ☐ Recalculate

**14** \*Aid Year:

Save

17. The Process Scheduler Request page displays.
18. Select the **OK** button.
19. The WCG Populate/Update page displays.
20. Select the **Process Monitor** link.
21. The Process List tab displays on the Process Monitor page.
22. Select the **Refresh** button.
23. The process **Run Status** should be **Success** and the **Distribution Status** should be **Posted**.

## WCG Eligibility Update

- The second step is the WCG Eligibility process which moves the data from the SNG Eligibility table and updates the eligibility fields on the WCG Eligibility page accordingly.

Begin by navigating to the **Calculate WCG Eligibility** page.

- You must have at least one of these local college managed security roles:
- ZD FA SNG Eligibility
  - ZZ FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > Calculate WCG Eligibility**

1. The WCG Calculate Eligibility search page displays.
2. Enter an existing or Add A New Value for the **Run Control ID**.
3. Select the **Search** button.

**WCG Calculate Eligibility**

Find an Existing Value   Add a New Value

2

Run Control ID WCG\_ELIG\_CALC\_KF

3

Add

4. The WCG Eligibility Update page displays.
5. Select the **Selection Tool** field and select **PS Query** from the drop-down list.
6. Select the **Query Name** field and choose the desired value from the list.
7. Select the **Edit Prompts** Link.

**⚠** The **Academic Institution** field in the **Parameters** section must be filled in for **Edit Prompts** link to open on the page. You cannot run the process without defining the **Edit Prompts**.

## WCG Eligibility Update

Run Control ID WCG\_ELIG\_CALC\_KF

[Report Manager](#)

[Process Monitor](#)

[Run](#)

**Population Selection**

☒ Population Selection

5

Selection Tool

PS Query

6

Query Name

CTC\_FA\_SNG\_ELIGIBILITY

7

Edit Prompts

[Launch Query Manager](#)

[Preview Selection Results](#)

**Parameters**

\*Academic Institution:

WA220

Tacoma CC

\*Aid Year:

2021

2020-2021 Financial Aid Year

[Save](#)

8. The Query Prompts pagelet displays.
9. Enter the **Institution** value.
10. Enter the **Aid Year** value.
11. Select the **OK** button.

**Query Prompt**

9

Institution

WA220

10

Aid Yr

2021

11

OK

Cancel

12. The WCG Eligibility Update page displays.
13. Confirm that the **Parameters** section has been fully populated.
14. Select the **Run** button.

## WCG Eligibility Update

Run Control ID WCG\_ELIG\_CALC\_KF      Report Manager      Process Monitor      **14** Run

---

**Population Selection**

☒ Population Selection

Selection Tool  [Edit Prompts](#)

Query Name  [Launch Query Manager](#)      [Preview Selection Results](#)

---

**Parameters**

\*Academic Institution: **13**  Tacoma CC

\*Aid Year:  2020-2021 Financial Aid Year

[Save](#)

15. The Process Scheduler Request page displays.
16. Select the **OK** button.

### Process Scheduler Request

User ID CTC\_KFORSBERG      Run Control ID WCG\_ELIG\_CALC\_KF

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Server Name       Run Date  [31](#)

Recurrence       Run Time       [Reset to Current Date/Time](#)

Time Zone

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**Process List**

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	E008 :Calculate WCG Eligibility	CTC_SNG_ELG	Application Engine	<input type="text" value="Web"/>	<input type="text" value="TXT"/>	<a href="#">Distribution</a>

**16** [OK](#) [Cancel](#)

17. The WCG Eligibility Update page displays.
18. Select the **Process Monitor** link.
19. Select the **Refresh** Button.
20. Check the **Run Status** of the **Process Instance** number assigned in previous step.

## Optional - Verify WCG Eligibility View

 To verify that the WCG Eligibility View component was populated, navigate to:

 You must have at least one of these local college managed security roles:

- ZD FA SNG Eligibility
- ZZ FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Eligibility View > WCG Elig and Archive Data**




1. The WCG Eligibility Data page displays.
2. Enter **Academic Institution** and **Aid Year**.
3. Select the **Search** button.

### WCG Eligibility Data


Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

ID	begins with		
Academic Institution	=	WA220	
Aid Year	=	2021	
National ID	begins with		
Last Name	begins with		
First Name	begins with		

☐ Include History ☐ Case Sensitive

**3** **Search** **Clear** [Basic Search](#)  [Save Search Criteria](#)

4. **Search Results** are displayed.



5. Select a student record from the list. Verify that data is populated in all the fields. The **Residency Date** field may not be populated, especially if the **Residency Prior** field is populated with **Yes**.
6. Verify that if the **Eligible?** field is populated with **Yes**, the **MFI Percent Calculation** and **WCG Award Amount** fields are present and populated and "All conditions have been met. Student is eligible" text is displayed in the **Message** field box.
7. If the **Eligible?** = **No**, verify that the **MFI Percent calculation** and **WCG Award Amount** fields are not displayed and there is a reason text in the **Message** field box.
8. Verify that the **Lock Eligibility Override** checkbox is **NOT** checked.
9. Select the **Next in List** button to scroll through multiple student records to review the different data values being populated into the fields.

WCG Eligible Data | WCG Archive Data

Academic Institution: WA220 Tacoma CC  
 Aid Year: 2020 2019-2020 Financial Aid Year Student ID: [REDACTED]

**Eligibility Data** Find | View All First 1 of 1 Last

Effective Date: 12/09/2019 Effective Sequence: 1 Operator ID: [REDACTED]

WCG Income: \$0.00  
 ISIR Family Size: 4  
 Number in College: 1  
 WCG Family Size: 4  
 EFC Status: Official  
 State of Residency: WA  
 Residency Date: [REDACTED]  
 Residency Prior: Yes  
 Have Need > 0: Yes  
 Bachelors Degree: No  
 Dependency: Independent w/Primary EFC  
 \*Citizenship Status: U.S. citizen  
 Transaction Number: 1  
 \*Current Grade Level: 3rd yr Junior  
 NSLDS Grade Level: 2nd Year

Lock Eligibility Override: ☐  
 Eligible?: Yes  
 MFI Percent Calculation: 50  
 WCG Award Amount: \$4107  
 Message: All conditions have been met. Student is eligible.  
 Calculate

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History

## WCG Archive Outbound

**i** WCG Archive Outbound process generates a list of SSNs. Begin by navigating to the [WCG Archive Outbound page](#).

**!** You must have at least one of these local college managed security roles:

- ZD FA SNG Eligibility
- ZZ FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Archive Outbound**

1. The WCG Archive Outbound search page displays.
2. Enter an existing or Add A New Value for the **Run Control ID**.
3. Select the **Search** button.

### WCG Archive Outbound

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

2

Search by: Run Control ID begins with WCG\_ARCH\_OUTB\_KF

☐ Case Sensitive

Search Advanced Search

3

4. The WCG Archive Outbound page displays.
5. Select the **Academic Institution** list and choose the desired value from the list item.
6. Select the **Aid year** list and choose the desired value from the list item.
7. Perform the appropriate selection for the **Select Eligibility** box.
8. Select the **Run** button.
9. The Process Scheduler Request page displays.
10. Select the **OK** button.
11. The WCG Archive Outbound page displays.
12. Select the **Process Monitor** link.
13. The Process Monitor page displays.
14. Select the **Refresh** button. Check the **Run Status** of the **Process Instance** number assigned in prior step.
15. Once process status is shown as success and distribution statuses as posted, select the **Details** link.
16. The Details page displays.
17. Select the **View Log/Trace** link.
18. The View Log/Trace page displays.
19. Select the applicable file name.

20. Carefully copy all the SSNs listed in the file.
21. Paste the list of SSNs into a new NotePad document.
22. Save the file onto your desktop with an appropriate file name (any file name will be sufficient). The format of the file should be saved as a .txt file.

## WCG Archive Outbound

Run Control ID WCG\_ARCH\_OUTB\_KF

Report Manager Process Monitor **8** Run

**5** \*Academic Institution: WA220 Tacoma CC

**6** \*Aid Year: 2021 2020-2021 Financial Aid Year

Select Eligible Only: ☐ **7**

**Save**

**!** Process the file you just saved into the WSAC WCG Archive Cruncher.

Once you process the file through the WCG Archive Cruncher, **DO NOT** open the file. Instead, save it directly to your desktop. Again, any file name will be sufficient. The format of the file should remain as .csv. (This is to eliminate having SSNs with leading zeros drop off in the file; which would result in an error during processing.)

Before proceeding with the WCG Archive Inbound process, be sure that the prior steps have been completed and you have access to the file you saved from the WCG Archive Cruncher.

## WCG Archive Import

**i** WCG Archive import process loads data from the Cruncher file into the archive import table. Begin by navigating to the WCG Archive Import page.

! You must have at least one of these local college managed security roles:

- ZZ FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Archive Import**

1. The WCG Archive Import search page displays.
2. Enter an existing or Add A New Value for the **Run Control ID**.
3. Select the **Search or Add** button.

### WCG Archive Import

Find an Existing Value Add a New Value

2

Run Control ID WCG\_ARCH\_INB\_KF

3

Add

4. The WCG Archive Inbound page displays.
5. Select the **Selection Tool** list and choose the desired value from the list item.
6. Select the **Upload File** button.

## WCG Archive Inbound

Run Control ID WCG\_ARCH\_INB\_KF      Report Manager      Process Monitor      Run

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**Population Selection**

☒ Population Selection

5 Selection Tool External File

6 Upload File      Delete File      View F

Attached File

File Mapping  [Create File Mapping](#)

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**Parameters**

\*Academic Institution: WA220 Tacoma CC

\*Aid Year: 2021 2020-2021 Financial Aid Year

[Save](#)

7. The File Attachment pagelet displays.
8. Select the **Browse** button - Browse for and select the file you received and saved from the WSAC WCG Archive Cruncher - Depending on the browser, select the **Open** button.
9. Select the **Upload** button.

File Attachment ×

[Help](#)

8 Browse...

9 Upload      Cancel

10. The WCG Archive Inbound page displays.
11. Select the **View File** button to verify that the file uploaded has the correct data.
12. Select the **File** mapping field - select the **SNG ARCHIVE INBOUND** value from the list item.
13. Select the **Preview Selection Results** to view data from within the file and how it will populate into the mapped fields.
14. Select the **Return** button.

## WCG Archive Inbound

Run Control ID WCG\_ARCH\_INB\_KF [Report Manager](#) [Process Monitor](#) [Run](#)

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**Population Selection**

☒ Population Selection

Selection Tool

Attached File WCG\_INBOUND.csv

File Mapping SNG ARCHIVE INBOUND

[Upload File](#) [Delete File](#) [View F](#)

[Edit File Mapping](#) [Preview Selection Results](#)

---

**Parameters**

\*Academic Institution:  Tacoma CC

\*Aid Year:  2020-2021 Financial Aid Year

[Save](#)

15. The WCG Archive Inbound page displays.
16. Enter the **Academic Institution**.
17. Enter the **Aid Year**.
18. Select the **Run** button.

## WCG Archive Inbound

Run Control ID WCG\_ARCH\_INB\_KF [Report Manager](#) [Process Monitor](#) [Run](#)

---

**Population Selection**

☒ Population Selection

Selection Tool

Attached File WCG\_INBOUND.csv

File Mapping SNG ARCHIVE INBOUND

[Upload File](#) [Delete File](#) [View F](#)

[Edit File Mapping](#) [Preview Selection Results](#)

---

**Parameters**

\*Academic Institution:  Tacoma CC

\*Aid Year:  2020-2021 Financial Aid Year

[Save](#)

19. The Process Scheduler Request page displays.
20. Select the **OK** button.

## Process Scheduler Request

User ID CTC\_KFORSBERG Run Control ID WCG\_ARCH\_INB\_KF

Server Name  Run Date 07/20/2020

Recurrence  Run Time 9:48:27AM

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	E008: WCG Archive Import	CTC_ARC_IMP	Application Engine	Web <input type="text"/>	TXT <input type="text"/>	Distribution

20

OK Cancel

21. The WCG Archive Inbound page displays.
22. Select the **Process Monitor** link.

## WCG Archive Inbound

Run Control ID WCG\_ARCH\_INB\_KF

Report Manager **22** Process Monitor

Process Instance: 42511091

**Population Selection**

☒ Population Selection

Selection Tool

Attached File WCG\_INBOUND.csv

File Mapping SNG ARCHIVE INBOUND


**Parameters**

\*Academic Institution:  Tacoma CC

\*Aid Year:  2020-2021 Financial Aid Year

23. The Process Monitor page displays.
24. Select the **Refresh** Button.
25. Check the **Run Status** of the **Process Instance** until **Run Status** is Success and **Distribution Status** is **Posted**.

## Optional: Verify Eligibility Messages

 You can view the Archive Inbound eligibility messages on each WCG student by running a query. Navigate to the [Query Viewer](#).

 You must have at least one of these local college managed security roles:


- ZD\_DS\_QUERY\_VIEWER

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer**

1. The Query Viewer search page displays.
2. Enter **Query Name** in the query name field: CTC\_FA\_SNG\_ALL\_RECORDS
3. Select the **Search** button.
4. The **Search Results** display.
5. Select the **HTML link** under the **Run to HTML** column.
6. The Query page displays.
7. Enter value in the **Institution** field.
8. Select **View Results** button.
9. The Results page displays.
10. Select the **Excel Spreadsheet** link.
11. Select the **Open with** radio button and select **Excel**.
12. Review and compare data in the query spreadsheet against data in the original file from the WSAC Cruncher results. Verify the data populated in the corresponding fields. **Tip!--**Filter the message column by **Not Eligible due to no remaining quarters**, and **Not Eligible due to Repayment Status**.
13. Also review the results under **Special Processing** and verify that the mentioned fields are updated appropriately.

## WCG Eligibility Data

 To test making manual changes on [WCG Eligibility Data](#) page and manually calculating the students' WCG eligibility, use the **Calculate** button on the [WCG Eligibility and Archive Data](#) page.



! You must have at least one of these local college managed security roles:

- ZD FA SNG Eligibility
- ZD FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Eligibility View > WCG Elig and Archive Data**

1. The WCG Eligibility Data search page displays.
2. Enter the **ID**.
3. Enter the **Academic Institution**.
4. Enter the **Aid Year**.
5. Select the **Search** button.

### WCG Eligibility Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

The screenshot shows the 'WCG Eligibility Data' search interface. At the top is a button labeled 'Find an Existing Value'. Below it is a section titled 'Search Criteria' with a dropdown arrow. The form contains several input fields, each with a dropdown menu and a search icon: 'ID begins with', 'Academic Institution' (containing 'WA220'), 'Aid Year' (containing '2021'), 'National ID begins with', 'Last Name begins with', and 'First Name begins with'. Below these fields are two checkboxes: 'Include History' and 'Case Sensitive'. At the bottom, there is a 'Search' button (highlighted with a red box and callout 5), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

6. Select **[+]** button to add a row.
7. In this example, you can change the student's eligibility -- as a scenario example, if you determined this student is truly an out-of-state resident. In this scenario example, enter OR (Oregon) into the **State of Residency** field.
8. Select the **Calculate** button -- note the eligibility changes.
9. Repeat steps for the remaining scenarios as needed.

WCG Eligible Data | WCG Archive Data

Academic Institution: WA  
 Aid Year: 2021 2020-2021 Financial Aid Year  
 Student ID:

Eligibility Data Find | View All First 1 of 1 Last

Effective Date: 07/17/2020 Effective Sequence: 1 Operator ID: 101001803

WCG Income: \$0.00  
 ISIR Family Size: 1  
 Number in College: 1  
 WCG Family Size: 1  
 EFC Status: Official  
 State of Residency: WA  
 Residency Date:   
 Residency Prior: Yes  
 Have Need > 0: Yes  
 Bachelors Degree: No  
 Dependency: Independent w/Primary EFC  
 \*Citizenship Status: U.S. citizen  
 Transaction Number: 1  
 \*Current Grade Level: 1st yr Attended Before  
 NSLDS Grade Level: 2nd Year

Lock Eligibility Override: ☐  
 \*Eligible?: Yes  
 MFI Percent Calculation: 50  
 WCG Award Amount: \$4218  
 Message: All conditions have been met. Student is eligible.

Calculate

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History

## WCG Override Process

**i** WCG Override process overrides the **Lock Eligibility Override** field on the **WCG Eligible Data** page for the students selected. Begin by navigating to the WCG Override Process page.

**Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Override Process**

1. The WCG Override process search page displays.
2. Enter an existing or **Add A New Value** for the **Run Control ID**.
3. Select the **Search** button.

## WCG Override process

Find an Existing Value   Add a New Value

2

Run Control ID WCG\_OVRRD\_PRCs\_KF

Add 3

4. The WCG Override Process page displays.
5. Select the **Selection Tool** and choose the desired value from the list item.
6. Select the **Query Name** list and choose the desired value from the list item.
7. Select the **Edit prompts** link.

## WCG Override Process

Run Control ID WCG\_OVRRD\_PRCs\_KF   Report Manager   Process Monitor   Run

**Population Selection**

☒ Population Selection

5   Selection Tool PS Query

6   Query Name CTC\_FA\_SNG\_OVERRIDE

7   Edit Prompts

Launch Query Manager   Preview Selection Results

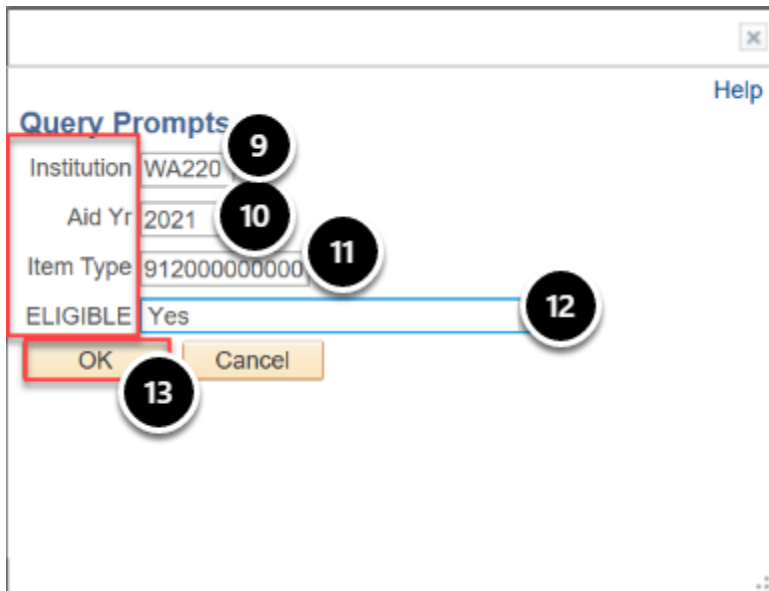
**Parameters**

\*Academic Institution: WA220   Tacoma CC   ☐ Lock Eligibility

\*Aid Year: 2021   2020-2021 Financial Aid Year

Save

8. The Query Prompts pagelet displays.
9. Enter the **Academic Institution**.
10. Enter the **Aid Year** list.
11. Select the desired value from the **Item Type** list -- in this example, we want to process an override lock determination on the Washington College Grant Item Type.
12. Select the desired value from the **Eligible** list -- in this example, we want to override lock determination on all **Yes** eligible.
13. Select **OK** button.



**Query Prompts** Help

Institution WA220 **9**

Aid Yr 2021 **10**

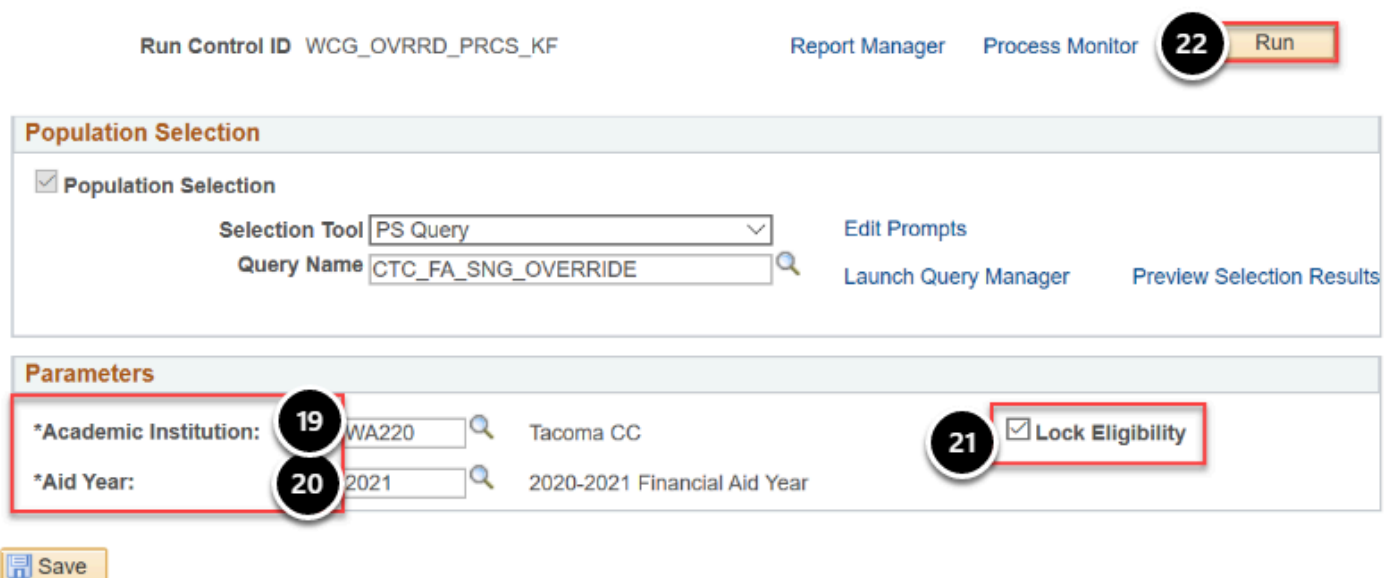
Item Type 912000000000 **11**

ELIGIBLE Yes **12**

OK **13** Cancel

14. The WCG Override Process page displays.
15. Select **Preview Selection** results.
16. The results display.
17. Select the **Return** button.
18. The WCG Override Process page displays.
19. Enter the **Academic Institution**.
20. Enter the **Aid Year**.
21. Select **Lock Eligibility** checkbox.
22. Select **Run** button.

## WCG Override Process



Run Control ID WCG\_OVRRD\_PRCs\_KF Report Manager Process Monitor **22** Run

**Population Selection**

☒ Population Selection

Selection Tool PS Query Edit Prompts

Query Name CTC\_FA\_SNG\_OVERRIDE Launch Query Manager Preview Selection Results

**Parameters**

\*Academic Institution: **19** WA220 Tacoma CC

\*Aid Year: **20** 2021 2020-2021 Financial Aid Year

**21** ☒ Lock Eligibility

Save

23. The Process Scheduler Request page displays.
24. Select the **OK** button.

## Process Scheduler Request

User ID CTC\_KFORSBERG Run Control ID WCG\_OVRRD\_PRCs\_KF

Server Name  Run Date 07/20/2020

Recurrence  Run Time 11:04:47AM

Time Zone

**Process List**

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	E008 : WCG Override Process	CTC_SNG_OVR	Application Engine	Web	TXT	Distribution

25. The WCG Override Process page displays.

26. Select the **Process Monitor** link.

## WCG Override Process

Run Control ID WCG\_OVRRD\_PRCs\_KF

Report Manager **26** Process Monitor

Process Instance:42511096

**Population Selection**

☒ Population Selection

Selection Tool PS Query

Query Name CTC\_FA\_SNG\_OVERRIDE

**Parameters**

\*Academic Institution: WA220  ☒ Lock Eligibility

\*Aid Year: 2021

27. The Process Monitor page displays.

28. Select the **Refresh** button.

29. The **Run Status** should be **Success**, and the **Distribution Status** should be **Posted**.

## Optional: Verify That the WCG Eligibility Data Page Was Updated

 You must have at least one of these local college managed security roles:


- ZD FA SNG Eligibility
- ZZ FA WCG Eligibility


If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation:** NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Eligibility View > WCG Elig and Archive Data

1. Using the list of student IDs from the verify eligibility messages step (Query Viewer), access the student's data in the **WCG Eligibility and Archive Data** page.
2. Verify that the **Lock Eligibility Override** checkbox is updated accordingly.

## WCG Setup

 In order to properly test the recalculation of WCG eligibility for all students who already have a WCG eligibility page, you must first make sure the **WCG Setup Table** has been updated to different values than what was used when the WCG eligibility processes were run the first time.

 You must have at least one of these local college managed security roles:

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

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation:** Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Setup

1. The WCG Awards Setup search page displays.

2. Enter **Academic Institution**.
3. Enter **Aid Year**.
4. Select the **Search** button.

## WCG Awards Setup

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

Academic Institution **2** WA220

Aid Year **3** 2021

**4** **Search** **Clear** **Basic Search** **Save Search Criteria**

5. The Award Amounts Table tab displays.
6. To test the fields on this page, you can update **NonBas Award Amount** in the first row (MFI percent = 50).
7. Select the **Save** button.

**Awards Amounts Table** **MFI Setup Table**

**Academic Institution** WA220 Tacoma CC

**Aid Year** 2021 **COPY**

Award Amounts				Personalize	Find	First	1-5 of 5	Last
	MFI Percent	NonBas Award Amount	Bas Award Amount					
1	50	4107	6588	+	-			
2	55	2877	4611	+	-			
3	60	2670	4282	+	-			
4	65	2466	3952	+	-			
5	70	2055	3294	+	-			

**Save** **Return to Search** **Notify**

# WCG Populate/Update Process

Once the **WCG Setup** has been updated, run the **WCG populate/update** process.

! You must have at least one of these local college managed security roles:

- ZD FA SNG Eligibility
- ZD SACR Financial Aid Config
- ZZ FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation:** NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Population/Update

1. The WCG Populate/Update search page displays.
2. Enter an existing or **Add A New Value** for the **Run Control ID**.
3. Select the **Search** or **Add** button.

## WCG Populate/Update

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

Run Control ID begins with WCG\_POP\_UPD\_KF

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

4. The WCG Populate/Update page displays.
5. Select the **PS Query** value from the **Selection Tool** drop-down list.
6. Select the **Query Name** field and enter the desired value from the list.
7. Select the **Edit Prompts** link.
8. The Edit Prompts pagelet displays.
9. Complete the available fields.



10. Select **OK** to close the pagelet.
11. The WCG Populate/Update page displays.
12. In the **Parameters** group box, select the **Academic Institution**.
13. Enter the **Aid Year**.
14. Select the **Recalculate** checkbox.
15. Select the **Run** button.

## WCG Populate/Update

Run Control ID WCG\_POP\_UPD\_KF Report Manager Process Monitor Run

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**Population Selection**

☒ Population Selection

Selection Tool PS Query Edit Prompts

Query Name CTC\_FA\_SNG\_POPULATE Launch Query Manager Preview Selection Results

---

**Parameters**

\*Academic Institution: WA220 Tacoma CC ☒ Recalculate

\*Aid Year: 2021 2020-2021 Financial Aid Year

Save

16. The Process Scheduler Request page displays.
17. Verify that the **E:008 SNG Population/Update Process** checkbox is selected.
18. Select the **OK** button.

## Process Scheduler Request

User ID CTC\_KFORSBERG Run Control ID WCG\_POP\_UPD\_KF

---

Server Name Run Date 07/20/2020

Recurrence Run Time 1:40:29PM Reset to Current Date/Time

Time Zone

---

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	E008 : WCG Population/Update	CTC_SNG_PRCS	Application Engine	Web	TXT	Distribution

OK Cancel

19. The WCG Populate/Update page displays.
20. Select the **Process Monitor** link.

## WCG Populate/Update

Run Control ID WCG\_POP\_UPD\_KF

Report Manager **Process Monitor** Run

Process Instance: 42511116

**Population Selection**

☒ Population Selection

Selection Tool  Edit Prompts

Query Name  Launch Query Manager Preview Selection Results

**Parameters**

\*Academic Institution:  Tacoma CC ☒ Recalculate

\*Aid Year:  2020-2021 Financial Aid Year

Save

21. The **Process Monitor** page displays.
22. Select the **Refresh** button.
23. Check the **Run Status** of the **Process Instance** number assigned in previous step.

**!** In order for the recalculated data to populate on the student's **WCG Eligibility** page, you must now run the **Calculate WCG Eligibility** process. Go to **Calculate WCG Eligibility** section of this QRG to refer to instructions to run that process.

## Optional: Verify Student Award Amount

**i** Verify that the process recalculated the students award amounts.

**!** You must have at least one of these local college managed security roles:

- ZD FA SNG Eligibility
- ZZ FA WCG Eligibility

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Eligibility View > WCG Elig and Archive Data**

1. The WCG Eligibility Data search page displays.
2. Enter **Academic Institution**.
3. Enter **Aid Year**.
4. Select the **Include History** checkbox.
5. Select the **Search** button.

### WCG Eligibility Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value


▼ Search Criteria

ID	begins with ▼		🔍
Academic Institution	= ▼	WA220	🔍
Aid Year	= ▼	2021	🔍
National ID	begins with ▼		
Last Name	begins with ▼		
First Name	begins with ▼		

☒ Include History ☐ Case Sensitive

Search

Clear

Basic Search 

Save Search Criteria

6. The Search Results portion of the page displays.
7. Select a student from the list.
8. Select **Search**.

## WCG Eligibility Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

### Search Criteria

ID

Academic Institution

Aid Year

National ID

Last Name

First Name

☒ Include History ☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

### Search Results

Only the first 300 results can be displayed.

View All					
First 1-100 of 300 Last					
ID	Academic Institution	Aid Year	National ID	Last Name	First Name
101000424	WA220	2021			
101004082	WA220	2021			
101005563	WA220	2021			
101005590	WA220	2021			
101005750	WA220	2021			

- Once on the **WCG Eligible Data** tab, check to see that the **MFI Percent Calculation** field contains correct value.
- If so, check that the **WCG Award Amount** was updated correctly.
- Go to a previous row to review what the award amount was before the recalculation.
- If the **MFI Percent Calculation** field contains a value other than expected, select on the **Next In List** button at the bottom of the page until you find a student with the desired value.

WCG Eligible Data

WCG Archive Data

Academic Institution: WA

Aid Year: 2021 2020-2021 Financial Aid Year

Student ID:

Eligibility Data

Find | View All

First 1 of 52 Last

Effective Date: 07/17/2020

Effective Sequence: 1

Operator ID:

WCG Income: \$0.00

ISIR Family Size: 1

Number in College: 1

WCG Family Size: 1

EFC Status: Official

State of Residency: WA

Residency Date:

Residency Prior: Yes

Have Need > 0: Yes

Bachelors Degree: No

Dependency: Independent w/Primary EFC

\*Citizenship Status: U.S. citizen

Transaction Number: 1

\*Current Grade Level: 1st yr Attended Before

NSLDS Grade Level: 2nd Year

Lock Eligibility Override:

\*Eligible?: Yes

MFI Percent Calculation: 50

WCG Award Amount: \$4218

Message: All conditions have been met. Student is eligible.

Calculate

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

13. Processes complete.