

9.2 Manually Awarding Aid for a Student without a FAFSA

Purpose: Use this document as a reference on how to award financial aid (i.e., scholarships, workforce funding, etc.) to a student who has not yet completed a FAFSA.

Audience: Financial Aid Staff

There will be instances where you will need to award certain types of Financial Aid to students on whom have not yet completed a FAFSA. For example, you may have to award a merit scholarship from a private outside donor, or you may have to award Workforce funding. There are four essential steps that need to happen before you can award:

1) Aid Year Activation - In the Financial Aid pages, you must Aid Year Activate a student so that FA Term and Budgets can be built. Recall that when an ISIR loads, that automatically Aid Year Activates a student. When no FAFSA exists, Aid Year Activation does not build, and you must manually Aid Year Activate the student as a precursor to FA Term.

2) Build FA Term - Depending on whether or not the student is enrolled in classes for the respective term, you will have to build FA Term manually. Recall that without an ISIR, the FA Term process will never build in batch, so this step will need a manual adjustment as a precursor to Budgets.

3) Build a Student Budget - Student budgets must be built manually so that you can successfully award aid. Recall that student budgets will not build without FA Term, so this step is a manual adjustment as a precursor to awarding.

4) Assign Awards to a Student - Once all the precursory steps are in place, you are ready to assign awards to a student. This will need a manual build using the **Num** and **Action** columns; you will not be able to "**Retrieve**" aid package as there is no other Financial Aid that you will be able to assign using the **Retrieve** button.

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

- ZD FA Aid Year Activation
- ZD FA Director
- ZZ FA Aid Year Activation

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

Aid Year Activation

Navigation: NavBar > Navigator > Financial Aid > Aid Year Activation > Manage Financial Aid Years

1. The Aid Year Activation search page displays.
2. Enter the **ID**.
3. Select the **Search** button.

Aid Year Activation

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	<input type="text"/>	
Campus ID	begins with	<input type="text"/>	
National ID	begins with	<input type="text"/>	
Last Name	begins with	<input type="text"/>	
First Name	begins with	<input type="text"/>	

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

4. The Student Aid Year Activation page displays.
5. Enter the **Institution**.
6. Enter the desired **Aid Year**.
7. Select the **Save** button.

Student Aid Year Activation



Student Active for		Personalize Find [Print] [Grid]		First	1 of 1	Last
*Institution	Description	*Aid Year	Description			
1 WA220	Tacoma CC	2021	2020-2021 Financial Aid Year			

Save Return to Search Notify

Build FA Term

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

- ZC FA Term Prcs
- ZD FA Director
- ZD FA Term Prcs
- ZZ FA Term Prcs

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 > Financial Aid Term > Maintain Student FA Term

1. The Financial Aid Term search page displays.
2. Enter the:
 - **ID**
 - **Academic Institution**
 - **Aid Year**
3. Select the **Search** button.

Financial Aid Term

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

Find an Existing Value

▼ Search Criteria

Empl ID	begins with ▼	<input type="text"/>	Q
Academic Institution	= ▼	WA220	Q
Aid Year	= ▼	2021	Q
National ID	begins with ▼	<input type="text"/>	
Campus ID	begins with ▼	<input type="text"/>	
Last Name	begins with ▼	<input type="text"/>	
First Name	begins with ▼	<input type="text"/>	

Include History Correct History Case Sensitive

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)

- The FA Term page displays.
- Enter the **Term** in which you assigning a FA Term. In this example, Fall term 2021 is used.

 Note that the example in this QRG, the student is not enrolled in classes, and is not Plan Stacked to a particular program. This example displays a brand new student who will--ideally--be matriculated into their program once the aid offer for scholarship or workforce funding is in place.

If the student to whom you are awarding a scholarship or workforce funding is enrolled and Plan Stacked, you can simply enter the **Term** on the FA Term tab, and select the **Build** button to build FA Term, and select **Save**. Refer to the QRG "Building an FA Term".

- Next, select the **Academic Career** from the drop-down list. Note that the **Override** check box will automatically be selected.
- Select the **Primary Program** from the drop-down box.
- Select the **Academic Plan** -- best practice is to assume the student will choose a general AA-DTA degree until the student refines their intent into their respective academic program with Enrollment Services.
- Select the **Campus** from the drop-down list.
- Next, select the **Acad Level** tab.

11. The Acad Level tab displays.
12. Select the checkbox in the FA Load row.

💡 By selecting the override checkbox, you are overriding the student's FA Load enrollment to remain at Full-Time. Recall that Financial Aid offers always assume Full-Time enrollment unless a student otherwise notifies the Financial Aid office.

During actual/real-time enrollment transactions, the **Academic Load** value will change on FA Term -- you can then compare that value to the **FA Load** value at Census and thereby determine the student's actual enrollment at that time.

13. Select the **Financial Aid** tab.

The screenshot shows a software interface with several tabs: FA_Term, Acad Level, Statistics, Financial Aid (highlighted), Records/Term Info, and Withdrawal Info. Below the tabs is a 'Term Information' section with 'Institution: Tacoma CC' and '*Term: 2207 2020 FALL'. The 'Student Data' section displays various fields: Effective Date (07/13/2020), Sequence (1), Effective Status (Active), Academic Career (Academic Career), Primary Program (Academic), Academic Plan (Academic Transfer AA DTA), Academic Sub-Plan, and Calculated Values. The 'Override' section includes checkboxes for 'Form of Study', 'Approved Academic Load', 'Academic Load', 'Financial Aid Load' (highlighted), 'Academic Level', 'Projected', 'Start', 'End', and 'Course Load Percent'. The 'Class Enrollment' and 'Full-Time' drop-down menus are selected. The 'Calculated Values' section shows 'Enrolled Full-Time' for both 'Academic Load' and 'Financial Aid Load'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

14. The Financial Aid tab displays.
15. Define the **NSLDS Loan year** by selecting the desired year from the drop-down box. Note that when selecting this option, the **Override** box is automatically selected.
16. Select the **Direct Lending Year** by choosing an option from the down box -- Repeat previous steps for each term in which you are inserting a new row to build a FA Term in that term for the Aid Year.

 You must project out terms for all terms in the Aid Year. When adding awards for one single term, the best practice is to award the aid leaving multiple term buckets open in the Aid Year so that if the funding is to be used in subsequent terms, you have already projected FA Term, built the budgets, and have made available the terms in your **Disbursement Plan**. This practice prevents having to add multiple **Item Types** in the award, that can be saved for other funding in the year, and thus, the aid package stays clean. When the student leaves the institution, you can then clean up the budgets and FA terms in which the student did not attend.

17. Select the **Save** button.

 You must define these values noted above because at the time Federal Financial Aid is offered at the time the student eventually completes their FAFSA, awards will error out

if these fields are not defined on this tab of FA Term. These fields will eventually update from the student's response to the Year in College questions on the FAFSA.

The screenshot shows a web application interface for Financial Aid. At the top, there are tabs: 'FA Term', 'Acad Level', 'Statistics', 'Financial Aid' (highlighted with a red box), 'Records/Term Info', and 'Withdrawal Info'. Below the tabs, the 'Term Information' section shows 'Institution: Tacoma CC', '*Term: 2207', and '2020 FALL'. The 'Student Data' section contains fields for 'Effective Date: 07/13/2020', 'Sequence: 1', 'Effective Status: Active', 'Academic Career: Academic Career', 'Primary Program: Academic', 'Academic Plan: Academic Transfer AA DTA', and 'Academic Sub-Plan'. Below this is the 'Override' section, which includes a red box around 'NSLDS Loan Year' (set to '1st Year - Never Attended') and 'Direct Lending Year' (set to 'First Year, never attended'). Other fields include 'Confer Date', 'Expected Grad Term', 'Expected Grad Date', 'Academic Standing', 'FA Standing', and 'Budget Required' (set to 'Yes - Budget Assign Required'). At the bottom, there are buttons for 'Save' (highlighted with a red box), 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

OPTIONAL: Back at the **FA Term** tab, in the **Student Data** group box, note the **Override Expiration Date** field. In this field, as part of your business process, you can enter a date in this field to have all the projected overrides deleted when the **Batch FA Term** is run based on real-time student enrollment activity.

The purpose of manually building FA term on a non-enrolled student is so you can proceed to offer them aid before they are registered. However, when the student finally registers for classes, you want the budgets to accurately build off of their real-time enrollment activity. If these override buttons are selected, they will remain in effect -- and accurate FA Term and Budgets will not build until these are **Overrides** are un-selected, using a new **Effective-Dated** row.

As a tip, you can use this **Override Expiration Date** field to hold the student in what you assume to be Full-Time enrollment, until the student actually is able to enroll for classes. Best practice would be to set this **Override Expiration Date** field to a date

that is prior to running your quarterly **FLF Process**, and **Authorization** and **Disbursement** process.

NOTE: If you do not use this optional process, to set an **Override Expiration Date**, you will have to manually track these students for which you manually build FA Term, and un-select the **Override Checkboxes** when the term enrollment activity has commenced for students. The reason Overrides must be unchecked prior to the start of the term, is so FA Term can build in batch, based on enrollment; as students may often declare degree changes and class loads prior to the start of the term.

If you use this option, remember to select the **Save** button.

The screenshot shows a web application interface for managing financial aid terms. The 'FA Term' tab is active. The 'Term Information' section displays 'Institution: Tacoma CC', 'Term: 2207', and '2020 FALL'. The 'Student Data' section includes fields for '*Effective Date' (07/13/2020), '*Effective Sequence' (1), and 'Override Expiration Date' (highlighted with a red box). There are also checkboxes for 'FA Calc' and 'Projections', and a 'Build' button. Below the 'Override Expiration Date' field, there are two columns: 'Override' with checkboxes and dropdown menus for 'Academic Career', 'Primary Program', 'Academic Plan', 'Sub-Plan', '*Aid Year', 'Billing Career', '*Campus', and 'Academic Year'; and 'Calculated Values'. At the bottom left, a 'Save' button is highlighted with a red box. Other buttons include 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

18. Next, you will manually build a student budget.

Build a Student Budget

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

- ZD FA Budgets

- ZD FA Director
- ZZ FA Budgets

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 > Budgets > Create Student Budget

1. The Create Student Budget search page displays.
2. Enter the:
 - **Empl ID**
 - **Academic Institution**
 - **Aid Year**
3. Select the **Search** button.

Create Student Budget

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

Find an Existing Value

▼ Search Criteria

Empl ID	begins with	<input type="text"/>	
Academic Institution	=	WA220	
Aid Year	=	2021	

Search Clear Basic Search Save Search Criteria

4. The Create Student Budget page displays.
5. Enter the desired term into the **Term** field.
6. Add a new row and then enter the next term in which you want a budget in the aid year.
7. Continue on until you have added all the desired terms.
8. Select the **Build Budget** button.

Create Student Budget

Noelle Smith

ID 101000042



Aid Year 2021

2020-2021 Financial Aid Year

Institution WA220

Budget Terms						Personalize Find [?] []		First 1 of 1 Last	
Term	Description	Career	Description	Messages					
1	2207	FALL 2020	UGRD	Academic Career	Messages	+	-		

Build Budget

Move Budget

Budget Term Summary				Find View All		First 1 of 1 Last	
Term				Detail			

Save Return to Search Notify

*Tip, in the **Budget Term Summary** group box, you can select the **Detail** link to preview the budget that was built. After reviewing the budget, select the **OK** button on the pagelet to return back to the **Create Student Budget** page.

9. Select the **Move Budget** button.
10. Select the **Save** button.

Create Student Budget

Aid Year 2021

2020-2021 Financial Aid Year

Institution WA220

Budget Terms						Personalize Find [?] []		First 1 of 1 Last	
Term	Description	Career	Description	Messages					
1	2207	FALL 2020	UGRD	Academic Career	Messages	+	-		

Build Budget

Move Budget

Budget Term Summary				Find View All		First 1 of 1 Last	
Term				Detail			
Term	2207	FALL 2020					
Career	UGRD	Academic Career					
Budget Group	SYSTEM	System Mass Budget					

Save Return to Search Notify

11. Now, you are ready to **Assign an Award to a Student**.

Assign Awards to a Student

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

- ZD FA Award Processing
- ZD FA Director
- ZZ FA Award Processing
- ZZ FA Award Processor

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

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

1. The Award Entry search page displays.
2. Enter the:
 - **Empl ID**
 - **Academic Institution**
 - **Aid Year**
3. Select the **Search** button.

Award Entry

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

Find an Existing Value

Search Criteria

Empl ID	begins with ▾	<input type="text"/>	🔍
Academic Institution	= ▾	WA220	🔍
Aid Year	= ▾	2021	🔍
National ID	begins with ▾	<input type="text"/>	
Campus ID	begins with ▾	<input type="text"/>	
Last Name	begins with ▾	<input type="text"/>	
First Name	begins with ▾	<input type="text"/>	

Search

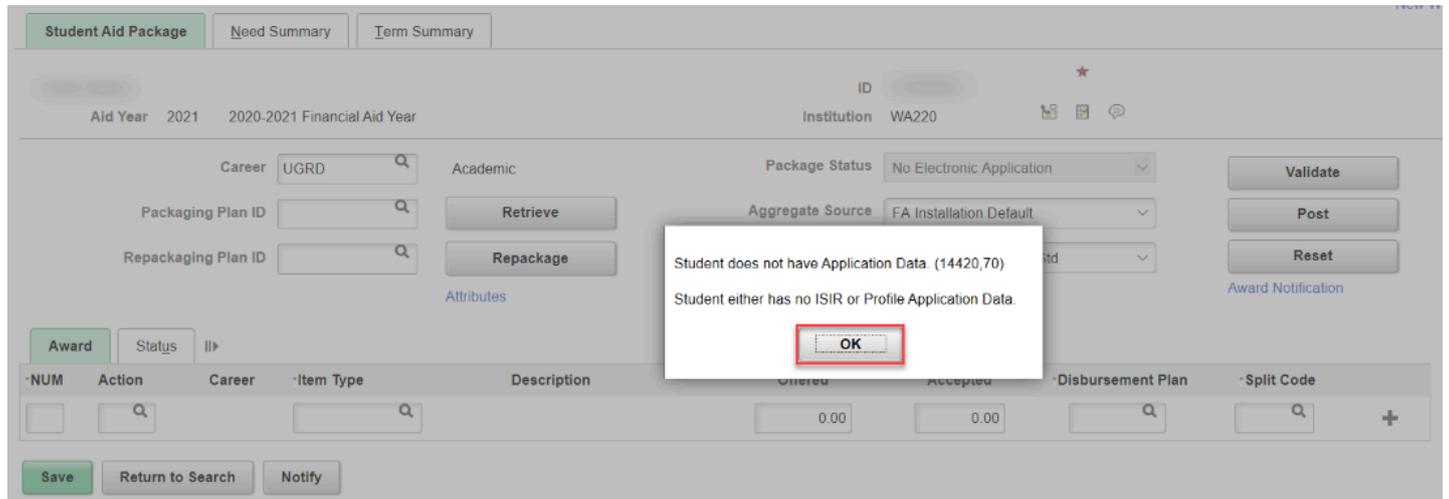
Clear

Basic Search

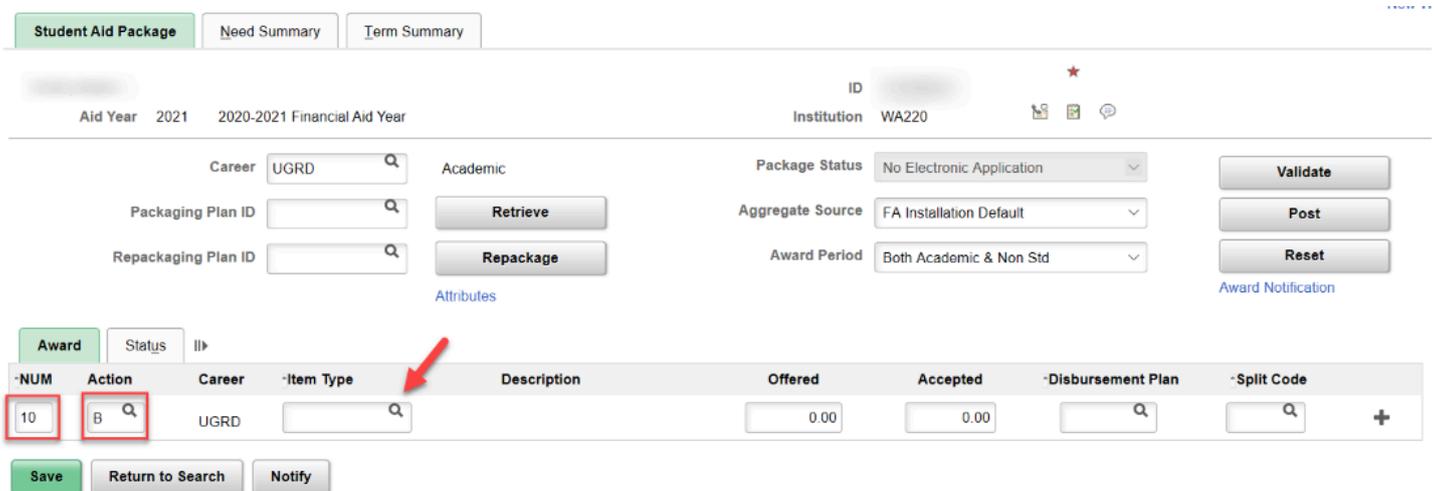


Save Search Criteria

4. The Award Entry page displays.
5. You will see a **Warning Message** -- this message is informing you that there is no FAFSA on file.
6. Select the **OK** button to continue.



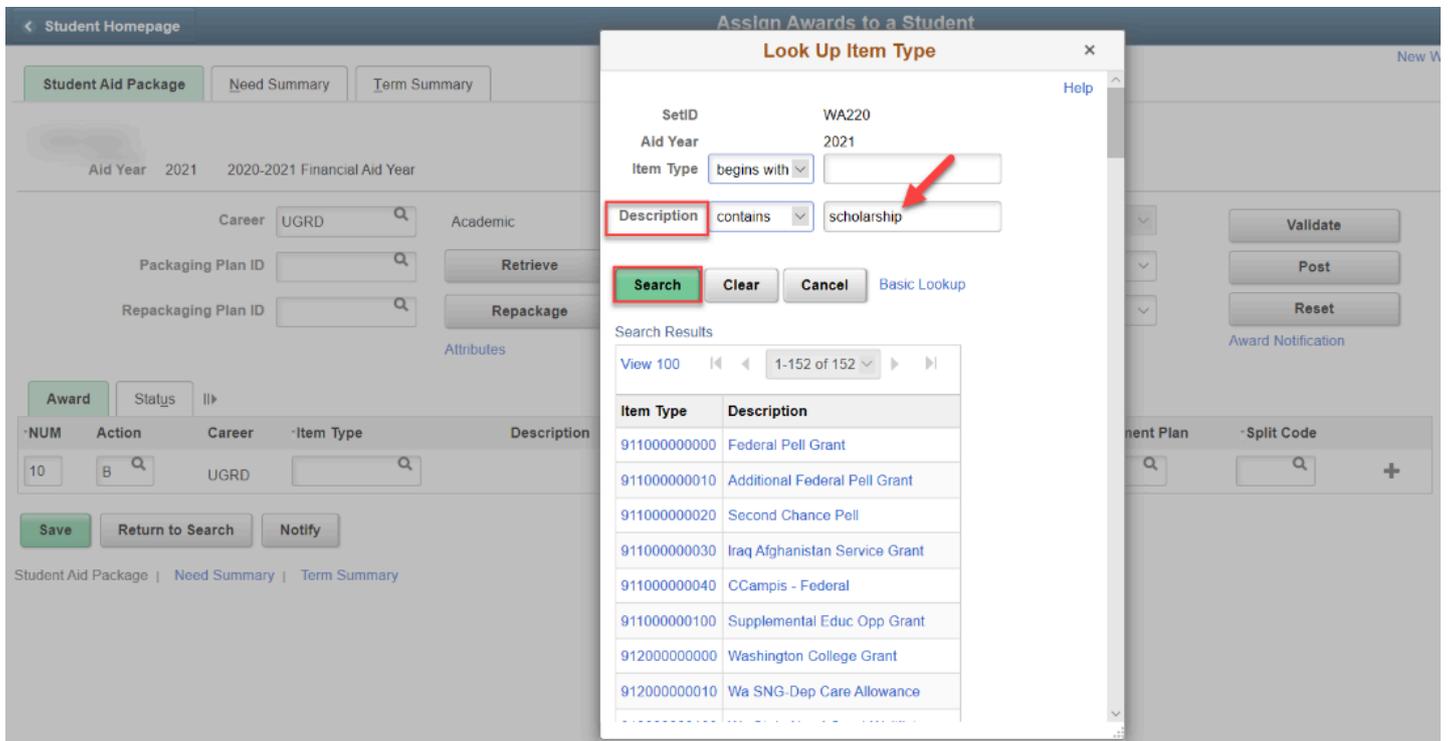
7. The Award Entry page displays.
8. On the **Student Aid Package** tab, enter the **NUM** value of "10" into the **NUM** field.
9. In the **Action** field, enter "B" to Offer/Accept the award.
10. Select the **Lookup Tool** in the **Item Type** field to choose your desired **Item Type**.



11. The Look Up Item Type pagelet displays.
12. Choose the desired **Item Type**.
13. Select the **OK** button to continue.

 In the **Item Type Lookup Search Criteria**, you can search by **Description** so you do not have to scroll through a long list of Item Types. You can narrow your search by moving the **Description** criteria to "**Contains**" -- instead of "**Begins With**", and enter in

a key word, i.e., Scholarships. Select the **Search** button. The system will then narrow your search down to the **Item Types** containing the key word **Scholarships**. Select the desired **Item Type**.



14. The Student Aid Package page displays.
15. Next, enter the desired amount of the scholarship in the **Offered** field. Select the tab button, and the **Accepted** amount will populate with the same amount.
16. Select the **Disbursement Plan Lookup Tool**. Note the **Disbursement Plan**, which automatically defaults to "10". Before **Validating** and **Posting** this award, double check your **Disbursement Plan**. Recall that best practice is to select the **Disbursement Plan** that has all four terms available in the **Aid Year**, so you have the option to increase and/or adjust the award later on in the **Aid Year**.

Student Aid Package | Need Summary | Term Summary

Aid Year 2021 2020-2021 Financial Aid Year

Institution WA220

Career UGRD Academic Package Status No Electronic Application

Packaging Plan ID [] Retrieve Aggregate Source FA Installation Default

Repackaging Plan ID [] Repackage Award Period Both Academic & Non Std

Validate Post Reset

Award Notification

Award Status

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code
10	B	UGRD	92400000001C	Outside Scholarship 1	1,500.00	1,500.00	10	AY

Save Return to Search Notify

💡 Note in the example below that the **Disbursement Plan** is set to "10", which is the **FA-WI-SU-SP** (Fall, Winter Spring, Summer). Note that in this example, this college is a Trailer college; Fall is the beginning of their Aid Year.

- The Look Up Disbursement Plan pagelet displays.
- Select the "10" **Disbursement Plan** to return back to the **Awarding** page.

Student Aid Package | Need Summary | Term Summary

Aid Year 2021 2020-2021 Financial Aid Year

Career UGRD Academic

Packaging Plan ID [] Retrieve

Repackaging Plan ID [] Repackage

Award Status

NUM Action Career Item Type Description

10 B UGRD 92400000001C Outside Schol

Save Return to Search Notify

Look Up Disbursement Plan

Academic Career UGRD

Disbursement Plan begins with []

Description begins with []

Search Clear Cancel Basic Lookup

Search Results

View 100 1-40 of 40

Disbursement Plan	Description
01	Fall-Winter-Spring
02	Fall-Winter
03	Fall Only
04	Fall-Spring
05	Winter-Spring
06	Winter Only
07	Spring Only
08	Summer Only
09	Summer Trailer Only-New Fiscal
10	Fall-Winter-Spring-Summer

Student Aid Package | Need Summary | Term Summary

ment Plan Split Code

AY

- The Student Aid Package tab displays.
- Select the **Split Code Lookup Tool**. Note the Split, which automatically defaults to "AY". Before **Validating** and **Posting** this award, double-check your **Split Code**. Recall that best

practice is to select the **Split Code** that has all four terms available in the **Aid Year**, so you have the option to increase and/or adjust the award later on in the **Aid Year**.

The screenshot shows the 'Student Aid Package' interface. At the top, there are tabs for 'Student Aid Package', 'Need Summary', and 'Term Summary'. Below this, there are fields for 'Aid Year' (2021), '2020-2021 Financial Aid Year', 'ID', and 'Institution' (WA220). There are also dropdown menus for 'Career' (UGRD), 'Academic', 'Package Status' (No Electronic Application), 'Aggregate Source' (FA Installation Default), and 'Award Period' (Both Academic & Non Std). Buttons for 'Validate', 'Post', and 'Reset' are visible. Below these are input fields for 'Packaging Plan ID' and 'Repackaging Plan ID', with 'Retrieve' and 'Repackage' buttons. A table of awards is shown below, with columns for 'NUM', 'Action', 'Career', 'Item Type', 'Description', 'Offered', 'Accepted', 'Disbursement Plan', and 'Split Code'. The first row shows '10', 'B', 'UGRD', '92400000001C', 'Outside Scholarship 1', '1,500.00', '1,500.00', '10', and 'AY'. A red arrow points to the 'AY' in the 'Split Code' column.

21. The Look Up Split Code pagelet displays.
22. Verify this is the desired **Split Code** plan, and select the **Split Code** to continue.

The screenshot shows the 'Look Up Split Code' dialog box. It has a 'Disbursement Plan' field set to '10' and a 'Split Code' field with a 'begins with' dropdown. There are 'Search', 'Clear', and 'Cancel' buttons. Below the search fields, there is a 'Search Results' section with a table of results. The table has columns for 'Split Code' and 'Description'. The first row is highlighted with a red box and contains 'AY' and 'Fall-Winter-Spring'. Other rows include 'F1' (Fall), 'F2' (Fall-Winter), 'F3' (Fall-Winter-Spring-Sumr), 'F5' (Fall-Spring), 'F6' (Fall-Spring-Summer), and 'F7' (Fall-Summer).

23. The Student Aid Package tab displays.
24. Once satisfied with the award, select the **Validate** button -- a Validation message will appear.
25. Select **OK** to continue.

Student Aid Package | Need Summary | Term Summary

Aid Year 2021 2020-2021 Financial Aid Year ID [redacted] Institution WA220

Career UGRD Academic Package Status No Electronic Application **Validate**

Packaging Plan ID [redacted] Retrieve Aggregate Source FA Installation Default **Post**

Repackaging Plan ID [redacted] Repackage Award Period Both Academic & Non Std **Reset**

Attributes Award Notification

Award | Status | Filter

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	B	UGRD	92400000010	Outside Scholarship 1	1,500.00	1,500.00	10	AY	+

Save | Return to Search | Notify

24. Before **Posting** the award, select the **Disbursement** link.

💡 By selecting the **Disbursement** link, you can verify the award split among the term as intended. In this example, the intended outcome is to award the scholarship in the Fall term only.

Student Aid Package | Need Summary | Term Summary

Aid Year 2021 2020-2021 Financial Aid Year ID [redacted] Institution WA220

Career UGRD Academic Package Status No Electronic Application **Validate**

Packaging Plan ID [redacted] Retrieve Aggregate Source FA Installation Default **Post**

Repackaging Plan ID [redacted] Repackage Award Period Both Academic & Non Std **Reset**

Attributes Award Notification

Award | Status | Filter

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10		UGRD	92400000010	Outside Scholarship 1	1,500.00	1,500.00	10	AY	Disbursement +

Save | Return to Search | Notify

25. The Award Disbursement Detail page displays.

26. After verifying the award applied correctly, select **OK**.

Award Disbursement Detail

*Sequence 10 Item Type 92400000010 Net Award Amount \$1,500.00
Disbursement Plan 10 *Split Code AY Custom Split

Disbursement Distribution

Disbt ID	Term	Award Period	Level	Offered	Accepted	Net Disbursement Balance	Disbursed
01	2207	Academic		1,500.00	1,500.00	1,500.00	0.00
02	2211	Academic		0.00	0.00	0.00	0.00
03	2213	Academic		0.00	0.00	0.00	0.00
04	2215	Academic		0.00	0.00	0.00	0.00

! At the Award Entry page, note the **Package Status**, which indicates "**No Electronic Application**" (No FAFSA).

When you **Post** this award in the next step, the **Package Status** will change to "**Packaged**". If the student ever completes a FAFSA, and is intended to be selected for **Mass Packaging**, this **Package Status** must be returned to its original status, which, in this case is "No Electronic Application".

If the **Package Status** is not returned to the original status before you manually packaged a scholarship or other funding -- and the **Packaging Status** remains at "**Packaged**", the student will never be selected for **Mass Packaging** because the system will read it as **Packaged**, and the process will ignore this student.

When manually awarding aid such as Scholarships, or Workforce funding, etc., you must always return the **Packaging Status** back to the original status directly after you **Post** the award.

27. The Student Aid Package tab displays.
28. Select the **Post** button -- an award posting message will appear.
29. Select **OK** to close the confirmation message and return to the Student Aid Package tab.
30. Change the **Packaging Status** back to its original status -- which, in this scenario, is "**No Electronic Application**".
31. Select **Save**.

Student Aid Package | Need Summary | Term Summary

ID 101000042 ★
Aid Year 2021 2020-2021 Financial Aid Year Institution WA220

Career UGRD Academic Package Status No Electronic Application
Packaging Plan ID Aggregate Source FA Installation Default
Repackaging Plan ID Award Period Both Academic & Non Std
Attributes Award Notification

Award | Status | ||>

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	-Split Code	
10	<input type="text"/>	UGRD	924000000010	Outside Scholarship 1	1,500.00	1,500.00	10	AY <input type="text"/>	Disbursement +

32. End of procedure.