

# CS: Local Configuration Guide - Financial Aid

This document contains the configuration decisions made and values to be used in deployment of the Financial Aid Module of Oracle's PeopleSoft Campus Solutions 9.2 application. As such, all additional documentation must be in agreement with the related items described herein. Should conflict arise with information contained in another document, the data in this document shall be considered valid and that of the other shall be deemed incorrect.

Any changes to the information in this document should be entered as dated additions. No information should be deleted once initial configuration has been completed.

The Financial Aid Configuration Guide explains necessary tables needed to set up an institution in the PeopleSoft system. The order of the configuration tables presented in this document adheres to the table setup sequence required to successfully set up all tables.

Financial Aid configuration is dependent upon Academic Structure setup being completed.

## Tables Contained within this Process

The tables in the chart below are configured using this guide. The chart below is being provided as a quick reference for listing the contents of the guide, as well as defining table ownership.

# Tables

<b>Table Name (PS Name)</b>	<b>Text Name (Descriptive)</b>	<b>Owner</b>
<b>INSTALLATION_FA</b>	<b>Financial Aid Installation</b>	<b>FA</b>
<b>PROCESS_COMMIT</b>	<b>Commit Levels</b>	<b>FA</b>
<b>FA_PRCSDemo_TBL</b>	<b>Define Demographic Data Use</b>	<b>FA</b>
<b>FED_AID_YR_TBL</b>	<b>Define Federal Aid Years</b>	<b>FA</b>
<b>AID_YEAR_TBL</b>	<b>Define Financial Aid Years</b>	<b>FA</b>
<b>TIV_SCHOOL_TBL</b>	<b>School Code Table</b>	<b>FA</b>
<b>INST_SCHOOL_CDS</b>	<b>School Code for Institution</b>	<b>FA</b>
<b>AID_YEAR_CAREER</b>	<b>Valid Careers for Aid Year</b>	<b>FA</b>
<b>SCHOOL_CAREER</b>	<b>Careers for School Codes</b>	<b>FA</b>
<b>AID_YR_CAR_TERM</b>	<b>Valid Terms for Career</b>	<b>FA</b>
<b>FA_DFLT_RUL_SET</b>	<b>Aid Processing Rule Setup</b>	<b>FA</b>
<b>SFA_SS_SETUP</b>	<b>Shopping Sheet Setup</b>	<b>FA</b>
<b>AID_YEAR_PROG</b>	<b>Valid Programs for Aid Year</b>	<b>FA</b>

<b>TERM_VALUES_XREF</b>	<b>Term Values Cross Reference</b>	<b>FA</b>
<b>ADMIT_LVL_TBL</b>	<b>Assign Status to Admit Levels</b>	<b>FA</b>
<b>PRSPCT_SRCE_TBL SOURCE_CAR_TBL SOURCE_PROG_TBL</b>	<b>Define Careers for Prospects</b>	<b>FA</b>
<b>HCR_SM_CRIT_TBL HCR_SM_RULE_TBL</b>	<b>Search/Match Criteria</b>	<b>CC</b>
<b>ISIR_INST_CNTRL ISIR_SRCH_ADD ISIR_SRCH_PRM</b>	<b>ISIR Data Load Parameters</b>	<b>FA</b>
<b>INST_LOAD_CNTRL</b>	<b>Profile Load Parameters</b>	<b>FA</b>
<b>INST_LOAD_CNTRL</b>	<b>Need Access Load Parameters</b>	<b>FA</b>
<b>SFA_NSLDS_LDCTL, SFA_NSLDS_SMADD, SFA_NSLDS_SMPRM</b>	<b>NSLDS Load Parameters</b>	<b>FA</b>
<b>FA_EDI_DEST</b>	<b>Define EDI Business Unit</b>	<b>FA</b>
<b>FA_ECTRANS</b>	<b>Maintain EDI Transactions</b>	<b>FA</b>
<b>CSL_CONTROL</b>	<b>CSL File Load Control</b>	<b>FA</b>
<b>SFA_COD_LOOKUP</b>	<b>View COD XML Fields</b>	<b>FA</b>
<b>SFA_COD_EDIT</b>	<b>View COD Edit Codes</b>	<b>FA</b>

<b>VERIF_FLD_TOLS VERIF_TOL_SETUP</b>	<b>Verification Tolerance Setup</b>	<b>FA</b>
<b>NSLDS_CODE_TBL</b>	<b>Maintain NSLDS Codes</b>	<b>FA</b>
<b>INAS_FM_ASMPTN INAS_IM_ASMPTN</b>	<b>INAS Assumption Codes</b>	<b>FA</b>
<b>INAS_LCL_PLCY</b>	<b>INAS 20XX-20XX Global Options</b>	<b>FA</b>
<b>INST_XREF</b>	<b>INST Cross Reference</b>	<b>FA</b>
<b>ISIR_COMMT_TBL ISIR_REJECT_TBL</b>	<b>Maintain ISIR Comment Codes</b>	<b>FA</b>
<b>ISIR_SAR_XREF</b>	<b>ISIR/SAR Cross Reference</b>	<b>FA</b>
<b>FATRMP_CAREER FATRMP_CAR_TRM</b>	<b>Setup Financial Aid Term</b>	<b>FA</b>
<b>ACAD_CAR_TERM</b>	<b>Define Career Types</b>	<b>SR</b>
<b>BUDGET_CATG_TBL</b>	<b>Budget Categories</b>	<b>FA</b>
<b>BUDGET_ITEM_TBL</b>	<b>Budget Items</b>	<b>FA</b>
<b>BDGT_FORMLA_TBL BDGT_FORMLA_TYP BDGT_FORMLA_DFN BDGT_FRMULA_GRP</b>	<b>Budget Formulas</b>	<b>FA</b>
<b>BDGT_TREE_CATG BDGT_TREE_TBL</b>	<b>Budget Trees</b>	<b>FA</b>

<b>BUDGET_GRP_TBL BUDGET_ITEM</b>	<b>Budget Groups</b>	<b>FA</b>
<b>BDGT_ASSIGN_CATG BDGT_ASSIGN_CNTL BDGT_ASSIGN_TERM</b>	<b>Budget Assignment</b>	<b>FA</b>
<b>RUN_CNTL_BDGT_P RUN_CNTL_FABDGT</b>	<b>Budget Assignment Run Control</b>	<b>FA</b>
<b>FA_ADDR_USAGE</b>	<b>Budget Tree Address Usage</b>	<b>FA</b>
<b>FA_APP_SRC_RANK FA_APP_SRC_TBL FA_APP_SRC_TYP</b>	<b>Application Source Rank</b>	<b>FA</b>
<b>BDGT_REGION_TBL</b>	<b>Budget Region Table</b>	<b>FA</b>
<b>SFA_SAP_STP_HDR SFA_SAP_ST_TBL SFA_SAP_STAT_XL SFA_SAP_AS_TBL SFA_SAP_MAX_ATT SFA_SAP_MAX_TRM SFA_SAP_GPA_TBL SFA_SAP_GPC_TBL SFA_SAP_EUT_TBL SFA_SAP_EUC_TBL SFA_SAP_CRS_TBL SFA_SAP_AWD_TBL SFA_SAP_CMK_TBL SFA_SAP_COM_TBL</b>	<b>Define SAP Set Up Criteria</b>	<b>FA</b>
<b>SFA_SAP_ET_AYRH SFA_SAP_ET_AYR</b>	<b>Define SAP Evaluation Aid Year</b>	<b>FA</b>
<b>SFA_SAP_ET_TRMH SFA_SAP_ET_TRM</b>	<b>Define SAP Evaluation Terms</b>	<b>FA</b>
<b>ERLY_FA_CTG_TBL</b>	<b>Early Fin Aid Categories</b>	<b>FA</b>

<b>EXT_ORG_TBL</b>	<b>Organization Table</b>	<b>CC</b>
<b>COMMITTEE COMMITTEE_MEMBR</b>	<b>Committees</b>	<b>CC</b>
<b>COMMITTEE_TBL COMMIT_ROLE_TBL</b>	<b>Committee Types/Roles</b>	<b>CC</b>
<b>RSTRC_AID RSTRC_AID_ORG ORG_CNTCT_PHN RSTRC_AID_COM RSTRC_AID_MEM</b>	<b>Restricted Aid Table</b>	<b>FA</b>
<b>SFA_AGGR_XREF</b>	<b>Aggregate Area Translation</b>	<b>FA</b>
<b>AGGR_LVL_XREF</b>	<b>Aggregate Level Translation</b>	<b>FA</b>
<b>AGGR_LIMIT_TBL AGGR_LVL_LIMITS</b>	<b>Aggregate Aid Limits</b>	<b>FA</b>
<b>AGGR_PROG_LVL AGGR_PROG_TBL</b>	<b>Aggregate Programs</b>	<b>FA</b>
<b>SFA_NSLDS_INST</b>	<b>Aggregate Areas for Institution</b>	<b>FA</b>
<b>DISB_PLAN_TBL</b>	<b>Disbursement Plan Table</b>	<b>FA</b>
<b>DISB_ID_TBL</b>	<b>Disbursement ID Table</b>	<b>FA</b>
<b>DISB_SPLIT_CD</b>	<b>Disbursement Split Codes</b>	<b>FA</b>
<b>DISB_ID_SPLIT</b>	<b>Disbursement Split Cd Formula</b>	<b>FA</b>
<b>KEYWORD_TBL</b>	<b>Keywords</b>	<b>SF</b>

<b>ITEM_TYPE_TBL ITEM_ACCT_TBL GL TABLES</b>	<b>Item Types</b>	<b>SF</b>
<b>See Student Financials</b>	<b>Item Type Security</b>	<b>SF</b>
<b>LN_FEE_TBL</b>	<b>Loan Fee Setup</b>	<b>FA</b>
<b>ITEM_TYPE_FA ITEM_TP_TERM_LMT ITEM_TP_FA_DISB ITEM_TP_FA_FEE</b>	<b>Financial Aid Item Types</b>	<b>FA</b>
<b>ITEM_TYPE_FISCL ITEM_TYPE_FNOTE</b>	<b>Fiscal Item Types</b>	<b>FA</b>
<b>AWD_ADJ_RSN_TBL</b>	<b>Award Adjustment Reasons</b>	<b>FA</b>
<b>AWD_MESSAGE_TBL</b>	<b>Award Messages</b>	<b>FA</b>
<b>PKG_EQUITY_ITM PKG_EQUITY_LMT</b>	<b>Packaging Equity Item Types</b>	<b>FA</b>
<b>PKG_REL_ITM_TBL PKG_REL_ITM_TYP</b>	<b>Related Item Type Group</b>	<b>FA</b>
<b>PKG_PLAN_TBL SFA_PKG_PLNRULE</b>	<b>Packaging Plan</b>	<b>FA</b>
<b>SFA_RPKG_PLAN SFA_RPKG_RULE</b>	<b>Repackaging Plan</b>	<b>FA</b>
<b>PKG_RTNGCMP_TBL</b>	<b>Package Rating Components</b>	<b>FA</b>
<b>FANLTR_FORM_TYP</b>	<b>Define Notification Form Types</b>	<b>FA/SF</b>

<b>FANLTR_EQTN_SEL</b>	<b>Define Selection Equations</b>	<b>FA/SF</b>
<b>SORT_ORDER_FLDS</b>	<b>Define Sort Order Fields</b>	<b>FA/SF</b>
<b>SORT_NAME_TBL SORT_ORDER</b>	<b>Define Sort Order Names</b>	<b>FA/SF</b>
<b>PRINTER_TBL</b>	<b>Define Printer Names</b>	<b>FA/SF</b>
<b>SFA_EA_TYPE</b>	<b>Define External Award Types</b>	<b>FA</b>
<b>SFA_EA_SOURCE SFA_EA_PROGRAM</b>	<b>Define External Award Sources</b>	<b>FA</b>
<b>SFA_EA_ITM_XREF</b>	<b>Item Types Cross Reference</b>	<b>FA</b>
<b>SFA_EA_SRCH_ADD SRCH_CRIT_CHG SFA_EA_SRCH_ORD</b>	<b>Search/Match Rules</b>	<b>FA</b>
<b>SS_FA_INSTALL</b>	<b>Self Service Options</b>	<b>FA</b>
<b>SS_FA_LOAN_STAT</b>	<b>Self Service Loan Status</b>	<b>FA</b>
<b>LN_INSTUTN_TBL LN_INST_DEST LN_INSTN_CNTRACT</b>	<b>Define Loan Institutions</b>	<b>FA</b>
<b>LN_TYPE_TBL LN_ITEM_TBL LN_PNOTE_TBL LN_TO_NSLDS_TYP</b>	<b>Create Loan Types</b>	<b>FA</b>
<b>SFA_CRC_DEST_ID SFA_CRC_DEST_CT</b>	<b>Create CRC Loan Participants</b>	<b>FA</b>

<b>SFA_CRC_DEST SFA_CRC_DESTCAT SFA_CRC_DESTEDT</b>	<b>Create CRC Loan Destinations</b>	<b>FA</b>
<b>SFA_CRC_EDITS</b>	<b>Maintain CRC Loan Edits</b>	<b>FA</b>
<b>SFA_CRC_EDITDFT SFA_CRC_EDITDTL</b>	<b>Create CRC Loan Edit Sets</b>	<b>FA</b>
<b>SFA_CRC_ACTN_CD</b>	<b>Maintain CRC Loan Status Codes</b>	<b>FA</b>
<b>SFA_CRC_SRCH_AD SEARCH_CRIT_CHG SFA_CRC_SRCH_PM</b>	<b>CRC Search/ Parms</b>	<b>FA</b>
<b>LN_DESTPROF_TBL LN_DEST_CATGRY LN_DEST_EDIT</b>	<b>Create Loan Destination</b>	<b>FA</b>
<b>LN_EDIT_TBL</b>	<b>Maintain Loan Edits</b>	<b>FA</b>
<b>LN_EDIT_DFLT LN_EDITDFLT_DTL</b>	<b>Create Loan Edit Sets</b>	<b>FA</b>
<b>LENDER_LOAD_TBL LEND_CNT_LD_TBL</b>	<b>Maintain Lender Codes</b>	<b>FA</b>
<b>LENDER_TBL LENDER_CONTACT</b>	<b>Define School Lenders</b>	<b>FA</b>
<b>SRVCR_LOAD_TBL</b>	<b>Maintain Loan Servicer Codes</b>	<b>FA</b>
<b>SERVICER_TBL SERV_CONTACT</b>	<b>Define School Servicers</b>	<b>FA</b>
<b>GUAR_LOAD_TBL</b>	<b>Maintain Guarantor Codes</b>	<b>FA</b>
<b>GUARANTOR_TBL GUARNTR_CONTACT</b>	<b>Define School Guarantors</b>	<b>FA</b>

<b>LN_AGENCY_DFLT</b>	<b>Reassign Loan Agencies</b>	<b>FA</b>
<b>LN_XFER_ID_TBL</b>	<b>Maintain Loan Transfer ID</b>	<b>FA</b>
<b>FA_EQ_NAME_TBL FA_EC_PROC</b>	<b>Hold &amp; Release Equations</b>	<b>FA</b>
<b>LN_RPT_PKG</b>	<b>Maintain Loan Report Packages</b>	<b>FA</b>
<b>LN_RPT_ITEM LN_RPT_COL</b>	<b>Maintain Loan Report Definitions</b>	<b>FA</b>
<b>LN_DL_INST_PARM</b>	<b>Direct Loan Change Rules</b>	<b>FA</b>
<b>LN_PN_TYPE_TBL</b>	<b>Define Serial Promissory Notes</b>	<b>FA</b>
<b>LN_ACTNCD_TBL LN_ACTN_PRG_TBL LN_ACTNMSG_TBL</b>	<b>Maintain Loan Action Codes</b>	<b>FA</b>
<b>SFA_LN_CNLS_SU SFA_LN_CNLS_SU2</b>	<b>Define Loan Counseling Options</b>	<b>FA</b>
<b>SFA_LNDR_SEL SFA_LNDR_DTL</b>	<b>Identify Self Service Lenders</b>	<b>FA</b>
<b>SFA_LN_SRCH_AD SRCH_CRIT_CHG SFA_LN_SRCH_PM</b>	<b>Set DL Loan Counseling Search</b>	<b>FA</b>
<b>SFA_COD_LN_ATTD</b>	<b>Loan Attended Routing ID</b>	<b>FA</b>
<b>SFA_PERKMPN_OPT</b>	<b>Setup Perkins MPN Options</b>	<b>FA</b>

<b>ECTRANS ECTRANSOPTION ECTRANSOPVAL</b>	<b>Define EDI Transactions</b>	<b>PT</b>
<b>ECTPPROFILE ECPROTRANS ECPRODFLTS ECACTIONS ECXMITDFLTS</b>	<b>Partner Profiles</b>	<b>PT</b>
<b>ECENTITYCDS</b>	<b>Entity Codes</b>	<b>PT</b>
<b>ECINTPARTNER ECINTLINK ECTPALIAS</b>	<b>Internal Partners</b>	<b>PT</b>
<b>EEXTPARTNER EEXTTPLINK ECTPALIAS</b>	<b>External Partners</b>	<b>PT</b>
<b>Lots of Tables</b>	<b>Inbound Maps</b>	<b>PT</b>
<b>Lots of Tables</b>	<b>Outbound Maps</b>	<b>PT</b>
<b>ECMAPPROFILE ECPROMAP</b>	<b>Data Mapping Profiles</b>	<b>PT</b>
<b>PELL_PMT_OPTION PELL_PMT_CAREER</b>	<b>Pell Payment</b>	<b>FA</b>
<b>PELL_ATTENDING</b>	<b>Pell ID Attending</b>	<b>FA</b>
<b>PELL_COMNT_TBL</b>	<b>Pell Comment Codes</b>	<b>FA</b>
<b>PROG_CASH_PROG PROG_CASH_PER</b>	<b>Reconciliation Periods</b>	<b>FA</b>
<b>ACAD_PLAN_TBL</b>	<b>Academic Plan Set Up</b>	<b>FA</b>
<b>AUTH_CAL_TBL AUTH_CAL_DATA DISB_CAL_TBL DISB_CAL_DATA</b>	<b>Set Up Disbursement Calendars</b>	<b>FA</b>

DISB_PRORATION DISB_PRO_RULES	Create Proration Rules	FA
DISB_RULE_GLB DISB_RULE_SRV DISB_RULE_TRK DISB_RULE_USR	Define Global Rules	FA
DISB_RULE_CHK DISB_RULE_ITK DISB_RULE_ITM DISB_RULE_ITS DISB_RULE_ITU	Define Item Type Rules	FA
FA_EDIT_MSG_TBL	Create User Edit Messages	FA
FANLTR_DEFAULTS	Award Notification Defaults	FA
RTRN_TIV_SETUP RTRN_TIV_SETUP0 RTRN_TIV_SETUP2 RTRN_TIV_SETUP3	Define Rules for (R2T4) Return	FA

## Define Financial Aid Years

Define the valid financial aid years for the institution by associating a valid federal aid year with the academic year of your institution.

**Academic Year Start & End Dates** - Enter the dates that your institution's academic year begins and ends. Academic year start and end dates are reported on the Origination record to the COD system.

**Aid Year Setup** Find | View All First 1-5 of 5 Last

*Aid Year	Description	Short Desc	Academic Year		
			Start Date	End Date	
2020	2019-2020 Financial Aid Year	2019-2020	07/08/2019	06/30/2020	+ -
2019	2018-2019 Financial Aid Year	2018-2019	07/01/2018	06/30/2019	+ -
2018	2017-2018 Financial Aid Year	2017-2018	07/01/2017	06/30/2018	+ -
2017	2016-2017 Financial Aid Year	2016-2017	07/01/2016	06/30/2017	+ -
2016	2015-2016 Financial Aid Year	2015-2016	07/01/2015	06/30/2016	+ -

**Navigation:** Set Up SACR > Product Related > Financial Aid > Aid Year > Define Financial Aid Years

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** AID\_YEAR\_TABLE

**Page:** Financial Aid Year

**Action:** UD

## School Code for Institution

Link an aid year with the Department of Education Title IV school codes for your institution.

Using configured values.

**School Codes for Institution**

Academic Institution WA College Copy from Previous Year

Aid Year 2020 2019-2020 Financial Aid Year

Aid Year	*School Code	*Description	Short Description	
1 2020	00: COLLEGE			+ -

**Navigation:** Set Up SACR > Product Related > Financial Aid > Aid Year > School Codes for Institution

## Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** INST\_SCHOOL\_CDS1

**Page:** School Codes for Institution

**Action:** UD

## Valid Careers for Aid Year

Link the aid processing rule sets to the career level that differ from the installation default values.

*Academic Career	*Description	Short Description	INAS Rule Set	CNAS FM Rule Set	CNAS IM Rule Set	Aid Processing Rule Set
UGRD	Academic Career	Academic	CSS Rules			130P

**Navigation:** Set Up SACR > Product Related > Financial Aid > Aid Year > Valid Careers for Aid Year

## Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** AID\_YEAR\_CAREER

**Page:** AID\_YEAR\_CAREER

**Action:** UD

## Careers for School Codes

Associate the career with the schools codes for your institution. This configuration is utilized by aggregate aid processing to track a student's financial aid history at your institution at the career and school code level. This setup must be configured before you can create loan institution records setup.

**Careers For School Codes**

Academic Institution WA  College

Aid Year 2020 2019-2020 Financial Aid Year  Copy

School Cd 00  COLLEGE

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**Academic Career** Find | View All First ◀ 1 of 1 ▶ Last

**Navigation:** Set Up SACR > Product Related > Financial Aid > Aid Year > Careers for School Codes

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** AID\_YEAR\_CAREER

**Page:** AID\_YEAR\_CAREER

**Action:** UD

## Valid Terms for Career

Define eligible financial aid terms, academic and loan periods for careers.

For institutions whose financial aid year does not line up with the global federal aid year, please note that you can change the loan period start and end dates as well as the academic year start and end dates at a student's individual loan origination level with population update. Important note for summer trailer institutions and summer header institutions with cross-over period.

**Valid Terms for Careers**

Academic Institution WA  
 Aid Year 2020 2019-2020 Financial Aid Year  
 Academic Career UGRD Academic Career

**Valid Terms for Career** Find First 1-4 of 4 Last

*Term 2203	Descr SPRING 2020	Short Desc 2020 SPRNG
Award Period Academic	Loan Period Start 04/06/2020	Payment Period Start Date 04/06/2020
	Loan Period End 06/18/2020	Anticipated Aid Display Date 05/01/2019
*Term 2201	Descr WINTER 2020	Short Desc 2020 WINTR
Award Period Academic	Loan Period Start 01/06/2020	Payment Period Start Date 01/06/2020
	Loan Period End 03/19/2020	Anticipated Aid Display Date 05/01/2019
*Term 2197	Descr FALL 2019	Short Desc 2019 FALL
Award Period Academic	Loan Period Start 09/23/2019	Payment Period Start Date 09/23/2019
	Loan Period End 12/12/2019	Anticipated Aid Display Date 05/01/2019
*Term 2195	Descr SUMMER 2019	Short Desc 2019 SUMMR
Award Period Academic	Loan Period Start 07/08/2019	Payment Period Start Date 07/08/2019
	Loan Period End 08/29/2019	Anticipated Aid Display Date 05/01/2019

**Navigation:** Set Up SACR > Product Related > Financial Aid > Aid Year > Valid Terms for Career

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** AID\_YR\_CAR\_TERM

**Page:** Valid Terms for Careers

**Action:** UD

## Aid Processing Rule Setup

Financial Aid provides additional flexibility in creating aid processing defaults. If certain careers or programs require default values that vary from the installation defaults, you can establish aid processing rule sets at either a career-specific or program-specific level to define alternate values for selected defaults. These default options include:

- Academic and nonstandard base weeks.
- Pell Grant eligibility calculation criteria.
- Packaging data source defaults.
- Pell number of terms.

The aid processing rule set can then be associated with the career that varies from the installation defaults, or the program that varies from both the career and installation defaults.

Set up aid processing rule sets only for those combinations of aid year and career that differ from each other and from your installation defaults and for those combinations of aid year and program that differ from each other, from the associated career level defaults, and from your installation defaults.

The screenshot shows the 'Aid Processing Rule Setup' web form. At the top, it displays 'Aid Processing Rule Set' with a value of 'IP'. Below this, there are two input fields: 'Description' with the value 'Pell Adjustments' and 'Short Description' with the value 'Pell Adj'. The form is divided into two main sections: 'Program' and 'Career'. The 'Program' section, titled 'Fields for use on Career and/or Program level', includes: 'Academic Base Weeks' (36.0), 'Non-Standard Base Weeks' (empty), a checkbox for 'Pell 3 Academic Weeks Only', three dropdown menus for '\*Pell Calculation Start', '\*Pell Calculation Midterm', and '\*Pell Calculation Census' (all set to 'Enrollment FA Load'), and '\*Pell Number of Terms' (3). There is also a checkbox for 'Use PELL Cross Over Logic'. The 'Career' section, titled 'Fields for use on Career level only', includes: 'GAP Item Type' (empty), 'Packaging Data Source' (Federal Data Only), and 'Application Source' (Profile). A mouse cursor is visible over the 'Career' section.

**Navigation:** Set Up SACR > Product Related > Financial Aid > Aid Year > Aid Processing Rule Setup

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** FA\_DFLT\_RULE\_SET

**Page:** FA\_DFLT\_RULE\_SET

**Action:** UD

## Campus OPEID Codes

A school code is assigned to each institution participating with the Department of Education and is used as an identification code during Electronic Data Exchange (EDE). In addition to its use in EDE processing, the Title IV school code is used to track a student's aggregate aid history. Use this page to set up campus OPEID codes and defaults.

**Campus OPEID**

Institution WA: [redacted] College

Aid Year 2020 2019-2020 Financial Aid Year

Personalize   Find   [icon]   [icon]				First	1 of 1	Last
*Campus		*OPEID Code	Default OPEID for Campus			
MAIN	Main Campus	00	<input checked="" type="checkbox"/>			[+/-]

**Navigation:** Set Up SACR > Product Related > Financial Aid > Aid Year > Campus OPEID Codes

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** SFA\_COD\_CAMP\_OPEID

**Page:** Campus OPEID

**Action:** A/UD

## College Financing Plan (Shopping Sheet) Setup

The College Financing Plan is a consumer tool created by the United States Department of Education (ED). The format is prescribed by an ED-issued template, which this feature of the system uses without modification. The College Financing Plan is designed to provide a standardized award letter allowing students to easily compare financial aid packages and make informed decisions on where to attend college. According to ED, it can be used with or in lieu of a financial aid award letter. The configuration for College Financing Plan groups control what institution and student data is used when the College Financing Plan is generated for the student.

[Group Options](#) | [Institution Information](#) | [Budget Mapping](#) | [Award Mapping](#)

**Institution** WA  **Copy Group**  
**Aid Year** 2020  Do Not Copy  
**Shopping Sheet Group** SHOPGRP01

**Group Attributes**

**Group Description**   
**\*Academic Career**    
**EFC Option**    
**Award Period**    
**Self Service Link Label**   
 Allow display with no awards

[Group Options](#) | [Institution Information](#) | [Budget Mapping](#) | [Award Mapping](#)

**Institution** WA  **Preview**  
**Aid Year** 2020  
**Shopping Sheet Group** SHOPGRP01

**Heading Information**

**Institution Name**   
**Institution Initial**   
**Institution Logo**

**Not Applicable Awards**

Federal Pell Grant       Federal Perkins Loan  
 Work-Study               Federal Subsidized Loan

**Institutional Metrics**

**Institution Group**   Primarily associate's degree  
**Cohort Year**

No Graduation Rate Data      Graduation Rate   
    Graduation Rate Level    
    Collection Year

No Repayment Rate Data      Institution Repayment Rate   
    National Repayment Rate

No Median Borrowing Data      Average Borrowed Amount   
    Average Monthly Payment

**Address Information**

**Institution Name**   
**Office Name**   
**Address**   
**City, State Zip**   
**Phone Number**

**Customized Information 1**

Message Set Number  Message Number

The estimated figures on this College Financing Plan are meant to help you easily compare financial aid packages offered by different institutions, and ultimately make an informed decision on where to invest in your higher education. Although we've done our best to accurately calculate these figures, please remember these are only estimates. Should you choose to attend our institution, your final figures could differ. For more information please visit our website <a class="a\_link" href="http://studentaid.ed.gov" target="\_blank">HERE</a>.

**Customized Information 2**

Message Set Number  Message Number

Group Options | Institution Information | **Budget Mapping** | Award Mapping

Institution WA  
Aid Year 2020  
Shopping Sheet Group SHOPGRP01

**Cost Group Mapping** Personalize | Find |  |  First 1-9 of 9 Last

* Shopping Sheet Cost Group	Budget Item Category	Description		
1 Tuition and fees	TUIT	Tuition/Fees	+ -	
2 Housing and meals	HSNG	Housing/Food/Utilities	+ -	
3 Books and supplies	BOOK	Books/Supplies	+ -	
4 Transportation	TRAN	Transportation	+ -	
5 Other education costs	CHLD	Child Care	+ -	
6 Other education costs	LOAN	Loan Fees	+ -	
7 Other education costs	MED	Medical Expenses	+ -	
8 Other education costs	MISC	Misc/Personal	+ -	
9 Other education costs	PLAN	Plan Related Expenses	+ -	

Group Options | Institution Information | Budget Mapping | **Award Mapping**

Institution WA  
Aid Year 2020  
Shopping Sheet Group SHOPGRP01

**Award Group Mapping** Personalize | Find |  |  First 1-9 of 9 Last

* Shopping Sheet Award Group	Fin Aid Type	Source	Federal ID		
1 Grant/Scholarship from school	Grant	Federal	Federal SEOG	+ -	
2 Grant/Scholarship from school	Grant	Institutional		+ -	
3 Grants from your state	Grant	State		+ -	
4 Other scholarships you can use	Scholarship	Private		+ -	
5 Work-Study	Work/Study	Federal	Federal Work Study Program	+ -	
6 Work-Study	Work/Study	State		+ -	
7 Federal Subsidized Loan	Loan	Federal	Fed Stafford Loan - Subsidized	+ -	
8 Federal Unsubsidized Loan	Loan	Federal	Fed Stafford Loan-Unsubsidized	+ -	
9 Federal Pell Grant	Grant	Federal	Federal PELL Grant	+ -	

**Item Type Inclusion Exceptions** Personalize | Find | View All |  |  First 1 of 1 Last

* Shopping Sheet Award Group	Item Type	Description		
1	<input type="text"/>	<input type="text"/>	+ -	

**Navigation:** Set Up SACR > Product Related > Financial Aid > Shopping Sheet Setup

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** SFA\_SS\_SETUP

**Page:** Group Options, Institution Info, Budget Mapping, Award Mapping

**Action:** A/UD

## INAS Assumption Codes

INAS assumption codes are provided by the College Board and are based on CPS (central processing system) and delivered with the Financial Aid system.

The screenshot displays the 'INAS FM Assumption Codes' configuration interface. At the top, there are two tabs: 'INAS FM Assumption Codes' (selected) and 'INAS IM Assumption Codes'. Below the tabs, the 'Aid Year' is set to '2020' and the '2019-2020 Financial Aid Year' is displayed. The main section is titled 'FM Assumptions' and includes a 'Find' search bar and a '1-70 of 70' indicator. The table below lists the following assumption codes and descriptions:

Code	Long Description
70	Assumption PG suppressed.
71	Assumption PI suppressed.
72	Assumption PV suppressed.
73	Assumption SM suppressed.
74	Assumption SQ suppressed.
75	Assumption SV suppressed.

INAS FM Assumption Codes		INAS IM Assumption Codes	
Aid Year 2020		2019-2020 Financial Aid Year	
<b>IM Assumptions</b>		1-94 of 94	
Code	Long Description		
P03A	Natural/adoptive parents reported status as "Never Married, Living Together"; assumed to be married.	+	-
P03C	Parents reported marital status as "blank" with both reporting income assumed to be married.	+	-
P03D	Parents reported marital status as "blank" with no indication of parental spouse assumed to be unmarried.	+	-
P03E	Biological/adoptive parents not married; Student doesn't live with either and "Provides Most Support" is blank; Mother assumed to be custodial parent.	+	-
P04	Parents' reported household size assumed from family matrix (missing or inconsistent data).	+	-
P05B	Parents' number in college assumed from family matrix (reported value blank or greater than or equal to household size).	+	-

**Navigation:** Set Up SACR > Product Related > Financial Aid > Application Processing > INAS Assumption Codes

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** INAS\_ASMPTN\_CODES

**Page:** INAS\_FM\_ASMPTN

**Action:** V

## INAS 20xx-20xx Global Options

Delivered Oracle values for processing each aid year. Institutions will need to select INAS Rule/Values prior to running the Calc INAS process.

Global and Federal Options	IM Tax/Assess & Parms	EFM Yes/No Options	IM Value Parms 1	IM Value Parms 2	IM Yes/No Options	Minimum SC Income
Aid Year 2020 2019-2020 Financial Aid Year		Institution WA				
Global Options <span style="float: right;">Find   View All   First 1 of 1 Last</span>						
*INAS Rule Set <span style="border: 1px solid black; padding: 2px;">CSS Rules/Values</span> <span style="float: right;">+ -</span>						
<b>Run Type</b>						
INAS Data Source <span style="border: 1px solid black; padding: 2px;">Federal Data</span>			INAS Calc Type <span style="border: 1px solid black; padding: 2px;">Federal Methodology</span>			
<b>Federal</b>						
<input type="checkbox"/> Calculate Student Federal Tax <input type="checkbox"/> Calculated Parent Federal Tax <input type="checkbox"/> Calculate PC For Independent			<a href="#">FM Budget Durations</a> <a href="#">EFC Proration Options</a>			
<b>Institutional</b>						
Use Which EFC <span style="border: 1px solid black; padding: 2px;">Greatest</span>			<a href="#">IM Budget Durations</a>			
Application Source <span style="border: 1px solid black; padding: 2px;">Profile</span>						
State <span style="border: 1px solid black; padding: 2px;">WA</span>						

**Navigation:** Set Up SACR > Product Related > Financial Aid > Application Processing > INAS 20xx-20xx Global Options

**Security:**

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

**Menu:** MANAGE\_NEED\_ANALYSIS

**Component:** LOCAL\_POLICY\_PT\_19 (Values can vary by Aid Year)

**Page:** INAS\_LCL\_PLCY1\_05

**Action:** V/UD

## Institutional Cross Reference

This configuration is delivered by Oracle in the annual regulatory releases. Several background processes and online pages use this table to link the institutional application field number and record field number to the table and column name in the Campus Solutions database. It cross-references the field name and description to the institutional record field number.

**Institutional Cross Reference**

Aid Year 2020 2019-2020 Financial Aid Year Institution WA

Find | View All First 1 of 9 Last

Record (Table) Name INST\_CONTROL Record Description Institutional App Control Tbl

Personalize | Find | View All | First 1-6 of 11 Last

	*Field Name	Description	INST Field Nbr	Aid Year		
1	SFA_PF_CATASTR_IND		0487	2020	+	-
2	SFA_PF_CHNG_EMPLMT		0488	2020	+	-
3	SFA_PF_DEN_EXP_IND		0489	2020	+	-
4	SFA_PF_ELDER_CARE		0490	2020	+	-
5	SFA_PF_FIN_SUP_IND		0491	2020	+	-
6	SFA_PF_NONE_IND		0492	2020	+	-

**Navigation:** Set Up SACR > Product Related > Financial Aid > Application Processing > Institutional Cross Reference

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

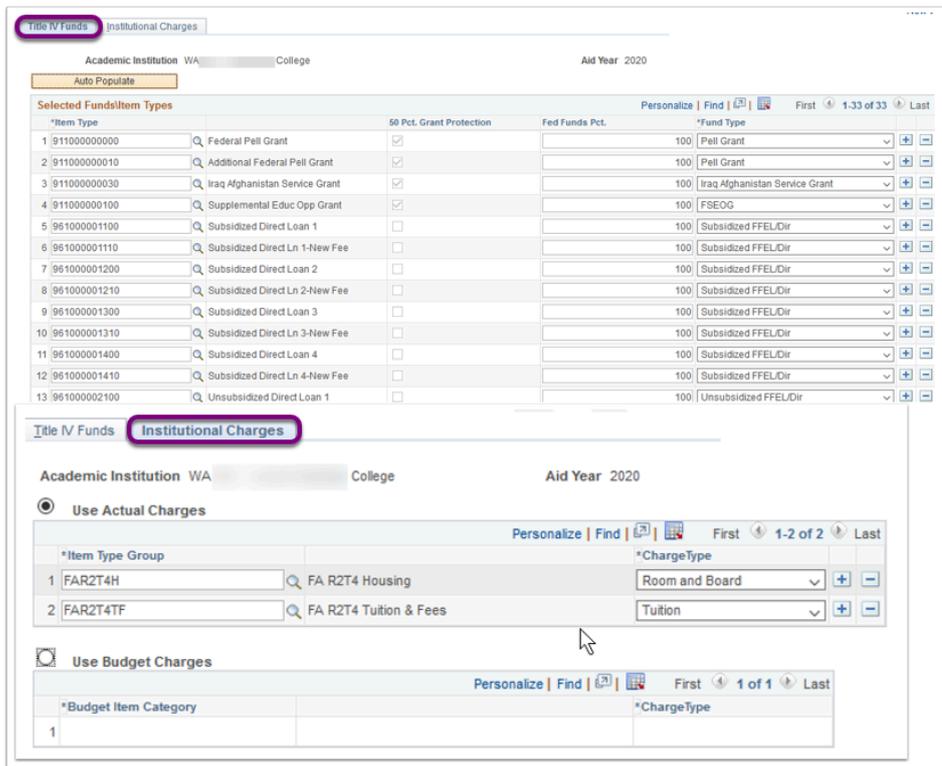
**Component:** INST\_XREF

**Page:** INST\_XREF

**Action:** V

## Define Rules for Return

Define Title IV funds financial aid item types for return of funds calculation. Set up institutional charges and the appropriate charge category and define the charges to be used in the calculation. For example, you can use actual charges, such as tuition and fees, that are charged to the student from Campus Solutions Student Financials or you can use the default budget item values.



**Navigation:** Set Up SACR > Product Related > Financial Aid > Application Processing > Define Rules for Return

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** RTRN\_TIV\_FND\_SETUP

**Page:** RTRN\_TIV\_FND\_SETUP

**Action:** V

## Set Up FA Term

Define the valid terms that can be used for building financial aid term records. Enter the FA Census Dt to be the day after the source Census Dt in order to include the source Census Dt in the window.

If the far-left checkbox is checked, the term is used in the automatic financial aid term build process when building terms in projection. FA census date must be entered as the census date plus 1 so the actual census date cutoff will come at the end of the day.

**FA Term Setup**

Institution WA College Aid Year 2020

**Career Information** Find 1 of 1

\*Academic Career JGRD Academic Career

Select	Term	Session	Weeks of Instruction	Census Dt	FA Census Dt	Lock
<input checked="" type="checkbox"/>	2203 SPRING 2020				04/11/2020	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2201 WINTER 2020				01/11/2020	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2197 FALL 2019				09/28/2019	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2195 SUMMER 2019				07/13/2019	<input checked="" type="checkbox"/>

**Navigation:** Set Up SACR > Product Related > Financial Aid > Financial Aid Term > Setup Financial Aid Term

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** FA\_TERM\_SETUP

**Page:** FA Term Setup

**Action:** UD/DA

## Financial Aid Career Type

Associates each of your academic careers with a financial aid career type. Please note: If you do not assign financial aid career types, the system associates all academic careers with the Undergraduate career type by default and combines statistics for all your academic careers.

**Financial Aid Career Type**

Academic Institution WA College

Academic Career UGRD Academic Career

**FA Career Type** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status: Active \*FA Career Type Undergraduate

**Navigation:** Set Up SACR > Product Related > Financial Aid > Financial Aid Term > Define Career Types

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** CAREER\_TYPE

**Page:** CAREER\_TYPE

**Action:** UD/DA

## Budget Categories

At the beginning of the aid-processing year, you create budgets that detail the cost of attendance (COA) for each term a student is enrolled. The COA is an estimate of a student's educational expenses for the period of enrollment. The budget helps establish a student's need (COA minus the student's expected family contribution), which permits the financial aid office to award need-based aid. To create budgets, you first create budget categories budget components such as tuition, housing, books, transportation, and fees. Then you create individual budget items within each category.

Define the budget components that make up the federal, Pell, or institutional budget. Using configured values.

**Create Budget Categories**

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

Copy Setup Data

*Category	Item Class	Pell Category	*Description	Short Desc
BOOK	Federal	Books and Supplies	Books/Supplies	BookSupl
CHLD	Federal	Dependent Child Care	Child Care	Child Care
COMP	Federal	Personal/Miscellaneous	Computer Required Expense	CompExps
HSNG	Federal	Housing	Housing/food/Utilities	Housing
LOAN	Federal	Student Activities Fees	Loan Fees	Loan Fees
MED	Federal	Personal/Miscellaneous	Medical Expenses	MedicalExp
MISC	Federal	Personal/Miscellaneous	Misc/Personal	MiscPers
PLAN	Federal	Personal/Miscellaneous	Plan Related Expenses	PlanExps
TRAN	Federal	Transportation	Transportation	Trans
TUIT	Federal	Tuition	Tuition/Fees	TuitFee

**Navigation:** Set Up SACR > Product Related > Financial Aid > Budgets > Budget Categories

**Security:**

- ZC FA Local Configuration

- ZC SACR Config
- ZC SACR Financial Aid Config
- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID1  
**Component:** BUDGET\_CATG\_TBL  
**Page:** Create Budget Categories  
**Action:** UD

## Budget Items

Budget items have different budget amounts to account for different student needs. For example, within the housing budget category, you might have budget items for students living with parents or relatives, living on campus, and living off campus. The amount for each item might differ depending on whether the student is enrolled part time or full time. Define budget items, term amounts, and Pell annual amounts by budget category.

### Budget Items

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 =

Aid Year =

Budget Item Category begins with

Description begins with

Case Sensitive

[Basic Search](#)

#### Search Results

View All First 1-10 of 10 Last

Academic Institution	Aid Year	Budget Item Category	Description
WA	2020	BOOK	Books/Supplies
WA	2020	CHLD	Child Care
WA	2020	COMP	Computer Required Expense
WA	2020	HSNG	Housing/Food/Utilities
WA	2020	LOAN	Loan Fees
WA	2020	MED	Medical Expenses
WA	2020	MISC	Misc/Personal
WA	2020	PLAN	Plan Related Expenses
WA	2020	TRAN	Transportation
WA	2020	TUIT	Tuition/Fees

**Create Budget Items**

Institution: WA College  
 Aid Year: 2020 2019-2020 Financial Aid Year  
 Budget Item Category: TUIT Tuition/Fees  
 Item Classification: Federal  
 Pell Category: Tuition

Copy Setup Data

---

**Budget Item** Find | View 1 First 1-3 of 3 Last

\*Budget Item Code: TUIT00 Short Description: Tuit00  
 \*Description: Tuition Zero  
 \*Budget Item Amount: 1.00 USD  
 Budget Multiplier:  FA\_NUMBER\_OF\_WEEKS  
 Pell Annual Amount:   
 Pell Less Half Annual Amount:   
 Long Description:   
 .:|

---

\*Budget Item Code: TUITF1 Short Description: FTResTut  
 \*Description: FT Resident Tuition  
 \*Budget Item Amount: 1,377.00 USD  
 Budget Multiplier:   
 Pell Annual Amount: 4,131.00  
 Pell Less Half Annual Amount: 4,131.00  
 Long Description: Full-Time Resident Tuition  
 .:|

---

\*Budget Item Code: TUITF2 Short Description: FTBCTut  
 \*Description: FT Border County Tuition  
 \*Budget Item Amount: 1,491.00 USD  
 Budget Multiplier:   
 Pell Annual Amount: 4,473.00  
 Pell Less Half Annual Amount: 4,473.00  
 Long Description: Full-Time Border County Tuition  
 .:|

**Navigation:** Set Up SACR > Product Related > Financial Aid > Budgets > Budget Items

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** BUDGET\_ITEM\_TABLE

**Page:** Create Budget Items

**Action:** UD

## Budget Formulas

After you define budget items, you define criteria for determining which budget item within a budget category a student is assigned using budget formulas.

Define assignment rules for each budget item which are used to calculate the student's budget.

Budget Formula | Budget Formula Groups

Institution WA College Aid Year 2020  
 Category TUIT Tuition/Fees Copy Setup Data

Formula Definition Find First 1 of 1 Last

\*Effective Date 05/19/2016 \*Status Active

**Formula Detail** Find | View First 1-9 of 9 Last

Formula Number 1 \*Processing Order 5 Amount 1.00  
 \*Budget Item Code TUIT00  Budget Multiplier Field FA\_NUMBER\_OF\_WEEKS  
 \*Description Tuition Zero Short Description Tu00

**Formula Definition** Personalize | Find 1 of 1

*Field Name	*Operation	*Field Value	AND/OR
FA_LOAD	-	N	

Formula Number 2 \*Processing Order 10 Amount 1,377.00  
 \*Budget Item Code TUITF1  Budget Multiplier Field  
 \*Description FT Resident Tuition Short Description FTResTuit

**Formula Definition** Personalize | Find 1-2 of 2

*Field Name	*Operation	*Field Value	AND/OR
APP_STATE_RESIDENC	-	WA	AND
FA_LOAD	-	F	

Formula Number 3 \*Processing Order 20 Amount 1,491.00  
 \*Budget Item Code TUITF2  Budget Multiplier Field  
 \*Description FT Border County Tuition Short Description FTBCTuit

**Formula Definition** Personalize | Find 1 of 1

*Field Name	*Operation	*Field Value	AND/OR
FA_LOAD	-	F	

Budget Formula | Budget Formula Groups

Academic Institution WA College Aid Year 2020  
 Category TUIT Tuition/Fees

Effective Date 05/19/2016 Status Active Find First 1 of 1 Last

**Formula Detail** Find | View First 1-9 of 9 Last

Formula Number 1 Processing Order 5 Amount 1.00  
 Budget Item Code TUIT00 Description Tuition Zero

**Student Groups** Personalize | Find 1 of 1

Field Name	Operation	Field Value	AND/OR
STDNT_GROUP			

Formula Number 2 Processing Order 10 Amount 1,377.00  
 Budget Item Code TUITF1 Description FT Resident Tuition

**Student Groups** Personalize | Find 1 of 1

Field Name	Operation	Field Value	AND/OR
STDNT_GROUP			

Formula Number 3 Processing Order 20 Amount 1,491.00  
 Budget Item Code TUITF2 Description FT Border County Tuition

**Student Groups** Personalize | Find 1 of 1

Field Name	Operation	Field Value	AND/OR
STDNT_GROUP			

**Navigation:** Set Up SACR > Product Related > Financial Aid > Budgets > Budget Formulas

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID1  
**Component:** BUDGET\_FORMULA  
**Page:** Budget Formulas  
**Action:** A/UD/DA/C

## Budget Groups

A generic budget group code is created for each term in the aid year. By using the batch budget process when budgeting students, creating budget groups without specifying categories, item types, or amounts allows the budget group code to act as a template during background budget assignment. Based on the budget formulas for which the student qualifies and the budget assignment table, the system automatically builds a budget for the student.

**Create Budget Group**

Budget Group Code SYSTEM      Institution WA

Aid Year 2020      2019-2020 Financial Aid Year

Career UGRD

Term 2195      SUMMER 2019

\*Description System Mass Budget

Short Description System

Cost of Attendance (Term)	
Inst COA	0.00
Fed COA	0.00
Pell COA	0.00
Pell LTHT	0.00

Copy Setup Data

Budget Group							Personalize	Find	1 of 1
*Category	*Item Code	*Amount	Pell Amount	Pell Less Half Annual Amount	*Currency	Translate Long Name			
					0.00 USD				

**Navigation:** Set Up SACR > Product Related > Financial Aid > Budgets > Budget Groups

### Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID1  
**Component:** BUDGET\_GROUP\_TABLE  
**Page:** BUDGET\_GROUP\_TABLE  
**Action:** A/UD/DA/C

## Budget Assignment

After you establish your institution's budget categories, budget items, budget formulas, and budget groups, the budget assignment brings it all together so that you can use online or

batch background budget assignment. In budget assignment, the following 3 steps are completed:

1. Specify the careers for which you want to assign budgets.
2. List the budget categories that should be used to create a term budget for each term.
3. Specify the academic careers and terms to which you want to assign budgets during background budget assignment.

Assign Career | Assign Budget Category

Academic Institution WA College Aid Year 2020

Academic Career UGRD Academic Career

Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901 \*Status Active

\*Description System Batch Budget Assignment

Comments System Batch Budget Assignment

Assign Career | Assign Budget Category

Academic Institution WA College Aid Year 2020

Academic Career UGRD Academic Career

Find First 1 of 4 Last

Effective Date 01/01/1901

\*Term 2020 \*Bdgt Group SYSTEM

\*Category BOOK \*Error Type Warning

\*Processing Rule Formula B

\*Description Books/Supplies

Comments Books/Supplies

\*Category HSNG \*Error Type Warning

\*Processing Rule Formula B

\*Description Housing/Food/Utilities

Comments Housing/Food/Utilities

\*Category MISC \*Error Type Warning

\*Processing Rule Formula B

\*Description Misc/Personal

Comments Misc/Personal

\*Category TRAN \*Error Type Warning

\*Processing Rule Formula B

\*Description Transportation

Comments Transportation

\*Category TUIT \*Error Type Warning

\*Processing Rule Formula B

\*Description Tuition/Fees

Comments Tuition/Fees

**Navigation:** Set Up SACR > Product Related > Financial Aid > Budgets > Budget Assignment

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** BUDGET\_ASSIGNMENT

**Page:** Assign Career Assign Budget Category

**Action:** A/UD/DA/C

## Aggregate Aid Limit

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

Create aggregate aid limits for annual and aggregate aid limits to meet your business processing rules.

**Aggregate Aid Limit**

Aggregate Area PELL130    Aid Year 2020    2019-2020 Financial Aid Year    Copy

Aggregate Aid Limit    Find    First 1 of 1    Last

\*Effective Date 01/01/1901    Status Active

\*Description Pell WA130

Long Description Federal Pell Grant WA130

Aggregate Program

Multi-Pass Processing for grade level change

Undergrad Lifetime

Graduate Lifetime

Max Terms

\*Source Federal

Federal ID Federal PELL Grant

\*Financial Aid Type Grant

Pell Grant

First Pell Percentage 100.00

Second Pell Percentage 150.00

Lifetime Eligibility Maximum 600.0000

**Grad Limit Rule**

Cumulative     Distinct

Aggr Lvl	Description	Aggregate Limit	Cumulative Limit	Max Terms
U0	Undergraduate Freshman - New	9,293		
U1	Undergraduate Freshman - Prev.	9,293		
U2	Undergraduate Sophmore	9,293		
U3	Undergraduate Junior	9,293		

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Aggregate Aid Limits

### Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** AGGR\_AID\_TBL

## Aggregate Areas for Institution

Identify aggregate areas to be evaluated for an institution during the NSLDS Push Data process. Using configured values.

*Aggregate Area	Description		
PELL	Pell WA	+	-
SEOG	FSEOG WA	+	-
SUB	Direct Loan - Subsidized WA	+	-
TEACH	TEACH WA	+	-
UNSUB	Direct Loan-Unsubsidized WA	+	-

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Aggregate Area for Institution

### Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** SFA\_NSLDS\_AGG\_INST

**Page:** SFA\_NSLDS\_AGG\_INST

**Action:** A/UD/DA/C

## Aggregate Programs

Establish aggregate aid program limits for Stafford programs for Direct Lending.

Using configured values.

**Aggregate Programs**

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**

Aggregate Program = WA Direct Stafford  
Description begins with

Case Sensitive

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

**Search Results**

View All First 1 of 1 Last

Aggregate Program	Description
DRCT	Stafford Direct Loan

**Aggregate Program**

Aggregate Program D

---

\*Description Stafford Direct Loan

Short Description Staff DL

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Aggregate Programs

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID1  
**Component:** AGGR\_PROG\_TABLE  
**Page:** AGGR\_PROG\_TABLE  
**Action:** A/UD/DA/C

## Disbursement Plan

Financial aid funds are awarded to students based on an annual or aid year amount, but you would rarely deliver these funds to students in one lump sum, unless the student is in attendance for only one term. Disbursement plans specify when and how much of a particular award to disburse, by term, to the student's account in Student Financials. Disbursement plans are established at the academic career level for each aid year. Disbursement plans are high level structural schemes possible within an academic career.

Using configured values.

**Disbursement Plan**

Academic Institution WA: \_\_\_\_\_ College

Academic Career UGRD Academic Career

Aid Year 2020 2019-2020 Copy

Personalize | Find | View All | | First 1-10 of 45 Last

*Plan	*Description	Short Description	30 Day Delay Loan Plan		
01	Fall-Winter-Spring	Fa-Wi-Sp	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
02	Fall-Winter	Fa-Wi	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
03	Fall Only	Fall	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
04	Fall-Spring	Fa-Sp	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
05	Winter-Spring	Wi-Sp	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
06	Winter Only	Winter	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
07	Spring Only	Spring	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
08	Summer Only	Summer	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
09	Summer-Fall-Winter-Spring	SuFaWiSp	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>
10	Summer-Fall-Winter	Su-Fa-Wi	<input type="checkbox"/>	<a href="#">+</a>	<a href="#">-</a>

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Disbursement Plan Table

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1  
**Component:** DISBURSE\_PLAN\_TBL  
**Page:** DISBURSE\_PLAN\_TBL  
**Action:** A/UD/DA/C

## Disbursement ID

Disbursement IDs and terms for each disbursement is associated with the disbursement plan. Disbursement IDs identify all the possible target disbursement dates within a specific period.

Using configured values.

The screenshot shows a table titled "Disbursement ID" with the following data:

Institution	WA	College	Aid Year	2020	2019-2020	Copy
Career	UGRD	Academic Career	Disbursement Plan	09	Summer-Fall-Winter-Spring	

Find | View 1 | First | 1-4 of 4 | Last

*Disbursement ID	01	(Aid Year Sequence)	+ -
*Description	Summer Disbursement 1		
Short Description	Sumr Disb1		
*Term	2195	Q SUMMER 2019	Award Period: Academic
*Disbursement Date	07/01/2019		
Loan Request Dt	07/01/2019		
*Disbursement ID	02	(Aid Year Sequence)	+ -
*Description	Fall Disbursement 1		
Short Description	Fall Disb1		
*Term	2197	Q FALL 2019	Award Period: Academic
*Disbursement Date	09/16/2019		
Loan Request Dt	09/16/2019		
*Disbursement ID	03	(Aid Year Sequence)	+ -
*Description	Winter Disbursement 1		
Short Description	Wntr Disb1		
*Term	2201	Q WINTER 2020	Award Period: Academic
*Disbursement Date	12/31/2019		
Loan Request Dt	12/31/2019		

This is a close-up of a single row in the Disbursement ID table:

*Disbursement ID	04	(Aid Year Sequence)	+ -
*Description	Spring Disbursement 1		
Short Description	Sprg Disb1		
*Term	2203	Q SPRING 2020	Award Period: Academic
*Disbursement Date	03/31/2020		
Loan Request Dt	03/31/2020		

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Disbursement ID Table

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** DISBURSE\_ID\_TBL

**Page:** DISBURSE\_ID\_TBL

**Action:** A/UD/DA/C

## Disbursement Split Code

Disbursement split codes are created to provide a label to the various patterns of disbursement IDs. For example, equal disbursement across terms, or fall only disbursement.

Using configured values.

### Disbursement Split Code

**Institution** WA  **College**

**Career** UGRD  Academic Career

**Aid Year** 2020  2019-2020

**Disbursement Plan** 09  Summer-Fall-Winter-Spring

Copy

* Split Code	* Description	Short Description		
<input type="text" value="AY"/>	<input type="text" value="Fall-Winter-Spring"/>	<input type="text" value="Fa-Wi-Sp"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="F1"/>	<input type="text" value="Fall"/>	<input type="text" value="Fall"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="F2"/>	<input type="text" value="Fall-Winter"/>	<input type="text" value="Fa-Wi"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="F5"/>	<input type="text" value="Fall-Spring"/>	<input type="text" value="Fa-Sp"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="U1"/>	<input type="text" value="Summer"/>	<input type="text" value="Summer"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="U2"/>	<input type="text" value="Summer-Fall"/>	<input type="text" value="Su-Fa"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="U3"/>	<input type="text" value="Summer-Fall-Winter"/>	<input type="text" value="Su-Fa-Wi"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="U4"/>	<input type="text" value="Sumr-Fall-Winter-Spring"/>	<input type="text" value="SuFaWiSp"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="U5"/>	<input type="text" value="Summer-Fall-Spring"/>	<input type="text" value="Su-Fa-Sp"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Disbursement Split Codes

### Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** DISB\_SPLIT\_CD

**Page:** DISB\_SPLIT\_CD

**Action:** A/UD/DA/C

## Disbursement Split CD Formula

This setup provides the specific percentage distribution to each disbursement ID created within a disbursement plan.

Using configured values.

### Disbursement Split Formula

Institution WA College Copy

Aid Year 2020 2019-2020 Financial Aid Year Disbursement Plan 09 Summer-Fall-Winter-Spring

Career UGRD Academic Career Split Code U4 Sumr-Fall-Winter-Spring

Even Split Option:  Total Disbursement: 100.00

Disbursement Split Percentages				
Disbursement ID	Description	Term	Disbursement Date	Percentage
01	Summer Disbursement 1	2195	07/01/2019	0.00
02	Fall Disbursement 1	2197	09/16/2019	0.00
03	Winter Disbursement 1	2201	12/31/2019	0.00
04	Spring Disbursement 1	2203	03/31/2020	0.00

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Disbursement Split Cd Formula

### Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** DISB\_ID\_SPLIT

**Page:** DISB\_ID\_SPLIT

**Action:** A/UD/DA/C

# Financial Aid Item Types

Before configuring Financial Aid item types, Student Financials must first create and define item types as financial aid item types for use in awarding various sources of funds. Financial aid item type configuration allows you to specify if the item type is Federal, State, Private, Institutional, or other. Item types specified under the Federal type will automatically be evaluated against delivered Federal processing rules when awarding for example, aggregate aid limits, Pell eligibility, etc.

The image shows two screenshots of a software interface for configuring Financial Aid Item Types.

The top screenshot is titled "FA Item Type Setup". It shows the configuration for a "Federal Pell Grant" item type. The "Effective Date" is 01/01/1901, and the "Status" is Active. The "Description" is "Federal Pell Grant" and the "Short Description" is "PELL". The "Financial Aid Type" is "Grant", the "Source" is "Federal", and the "Federal ID" is "Federal PELL Grant". The "Aggregate Area" is "PELL130" and the "Institution Reporting Cd" is "SAPC". There is an unchecked checkbox for "Additional Pell" and a "Comments" text area.

The bottom screenshot is titled "Awarding Rules". It shows the configuration for the same item type. The "Effective Date" is 01/01/1901 and the "Status" is Active. The "Fed/Inst Affected" is "Federal Only", "Meet Need/Cost" is "Straight Need/Cost", and "Packaging Methodology" is "Federal Methodology". The "Selection Criteria" is empty. There are several checkboxes: "Need Based" (checked), "Self Help Award" (unchecked), "Equity Award" (unchecked), "Auto Package" (checked), "Package Only Once" (unchecked), "Don't Repackage" (unchecked), "Lock Award" (unchecked), and "Disbursement Protection" (checked). A "Rounding Rules" section is also visible, with "Rounding Option" set to "Round Even Dollar", "Round Direction" set to "Round Nearest", "Award Remainder Rule" set to "Last Disbursement - Dollars", and "Fee Remainder Rule" set to an empty dropdown. There is an unchecked checkbox for "Truncate Fees".

FA Item Type 1 | FA Item Type 2 | **FA Item Type 3** | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

SetID WA  
 Item Type 911000000000 Federal Pell Grant  
 Aid Year 2020 2019-2020 Financial Aid Year

**Award Attributes** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status: Active

Pass Anticipated Aid Award Acce Anticip Aid Expiration Days 365

Disbursement Method Student Acc Auto Cancel Item Type

Signature Required  Manual Authorization  Include in Transcript

Print Letter Option Print  Print as Award Item  Print as Other Resource

Award Letter Print Award Message

**Self Service Actions**  
 Accept  Reduce  Decline

---

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | **FA Item Type 4** | FA Item Type 5 | FA Item Type 6

SetID WA130  
 Item Type 911000000000 Federal Pell Grant  
 Aid Year 2020 2019-2020 Financial Aid Year

**Award Limits by Term Category** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status: Active

*Term Category	*Minimum	*Maximum		
Regular Term	1.00	99,999.00	+	-

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | **FA Item Type 5** | FA Item Type 6

SetID WA  
 Item Type 911000000000 Federal Pell Grant  
 Aid Year 2020 2019-2020 Financial Aid Year

**Disbursement Rules** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status: Active

Missing Term Enrollment:  Split evenly across valid term

**Default Disbursement Splits** Personalize | Find | First 1 of 1 Last

*Academic Institution	*Academic Career	*Disbursement Plan	*Split Code
WA130	UGRD	09	AY

---

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | **FA Item Type 6**

SetID WA130  
 Item Type 911000000000 Federal Pell Grant  
 Aid Year 2020 2019-2020 Financial Aid Year

**Loan Program** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

Loan Program Loan Interest Attribute

**Loan Fees** Personalize | Find | First 1 of 1 Last

*Loan Fee	Loan Fee Type	Loan Fee Rule	Loan Fee Option	Fee Percent	Flat Fee
1					

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** FINANCIAL\_AID\_ITEM

**Page:** FA Item Type 1-6

**Action:** A/UD/DA/C

## Fiscal Item Types

Assign fiscal limits to financial aid item types. Define the maximum amount of money that can be offered, accepted, and disbursed for a financial aid item type.

For your institution specific item type fiscal configuration, run query: CTC\_FA\_LC\_AYRO\_FISCAL\_ITEMTYPE.

Assign Fiscal Limits
Fiscal Fund Status
Fiscal Fund Notes

SetID WA

Item Type 911000000000 Federal Pell Grant      Aid Year 2020    2019-2020 Financial Aid Year

	Offer	Accept		Disbursements
Budgeted	9,999,999.00	9,999,999.00	Budgeted	9,999,999.00
Gross	0.00	0.00	Paid	0.00
Reductions	0.00	0.00	Potential Payments	9,999,999.00
Net	0.00	0.00		
Available	9,999,999.00	9,999,999.00		
Count	0	0		
Highest	0.00	0.00	Audit Fields	

Assign Fiscal Limits		Fiscal Fund Status		Fiscal Fund Notes	
SetID WA					
Item Type 911000000000 Federal Pell Grant		Aid Year 2020 2019-2020 Financial Aid Year			
	Offer	Accept		Disbursements	
Budgeted	9,999,999.00	9,999,999.00	Budgeted	9,999,999.00	
Gross	0.00	0.00	Paid	0.00	
Reductions	0.00	0.00			
Net	0.00	0.00	Potential Payments	9,999,999.00	
Available	9,999,999.00	9,999,999.00	Cancelled Amount	0.00	
Count	0	0		Count	0
Highest	0.00	0.00	Declined Amount	0.00	
				Count	0

Assign Fiscal Limits		Fiscal Fund Status		Fiscal Fund Notes	
SetID WA					
Item Type 911000000000 Federal Pell Grant		Aid Year 2020 2019-2020 Financial Aid Year			
<b>Notes</b>		Find   View All First 1 of 1 Last			
User ID		Date/Time			
<div style="border: 1px solid blue; height: 100px; width: 100%;"></div>					

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Fiscal Item Types

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** ITEM\_TYP\_FISCAL

**Page:** Assign Fiscal Limits

**Action:** UD

## Related Item Type Group

Related item type groups are used to award a group of similar funds, such as institutional or endowed restricted funds, in a specific order until the group maximum is met. For example, an institution may have more than 200 endowed or restricted funds from which to award a student. By implementing a related item type group, you can group these funds together in discrete categories for quick evaluation through packaging plans. If the related item type is used in a packaging plan, the packaging plan maximum may also affect the amount awarded from the related item type group. When a related item type is used in a packaging plan, only the financial aid item types for which a student qualifies are actually awarded.

The EXCLUDE related item type group is a defined global configuration to specify which item types are to be excluded from Over-award.

**Related Item Type Group**

Academic Institution WA College  
Academic Career UGRD Academic Career

Aid Year 2020  
Related Item Group EXCLUDE

**Related Item Group** Find First 1 of 1 Last

\*Effective Date 01/01/1901 Status Active

Description Exclude from Term Over-Award Short Description ExcludeTO

Group Maximum Maximum Number of Awards

Selection Criteria

**Related Items** Personalize Find View All First 1 of 1 Last

Item Type	Description	Processing Order
-----------	-------------	------------------

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Related Item Type Group

### Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID2  
**Component:** PKG\_REL\_ITEM\_GROUP  
**Page:** PKG\_REL\_ITEM\_GROUP  
**Action:** UD

## Packaging Plan

Packaging plans are aid year and academic career specific. Define award rules and limits for targeted groups of students for use in auto and mass packaging.

The screenshot shows the 'Packaging Plan' configuration screen. At the top, there are tabs for 'Packaging Plan', 'EM Target', 'IM Target', 'Equity Rule', 'Packaging Limits', 'Packaging Rules 1', and 'Packaging Rules 2'. The main header displays 'Academic Institution WA' College and 'Aid Year 2020'. Below this, 'Academic Career UGRD Academic Career' and 'Plan ID SUFAWISP' are shown. The 'Package Plan' section includes fields for '\*Effective Date' (06/15/2016), '\*Status' (Active), 'Processing Order' (10), '\*Award Period' (Both Academic & Non Std), '\*Description' (Summer/Fall/Winter/Spring), 'Short Description' (SUFAWISP), and 'Selection Criteria' (CTCFAPUFS). A 'Copy' button and navigation arrows are also present.

The screenshot shows the 'Packaging Rules 1' configuration screen. The top tabs are the same as in the previous screen. The main header displays 'Academic Institution WA' College and 'Aid Year 2020'. Below this, 'Academic Career UGRD Academic Career' and 'Plan ID SUFAWISP' are shown. The 'Package Rule' section includes fields for 'Effective Date' (06/15/2016), 'Status' (Active), and 'Processing Order' (10). The 'Item Types' section includes 'Sequence Nbr' (10), '% of Total Package' (100.0), and 'Spending Limit Preferences'. There are radio buttons for 'Gap', 'Item Type' (selected), and 'Related Item Group'. The 'Item Type' field is set to '91100000000' with the label 'Federal Pell Grant'. The 'Selection Criteria' is 'CTCFASBSPELL'. A 'Limited by' section at the bottom has radio buttons for 'Constant' and 'Equation' for both 'Minimum' and 'Maximum' values, with 'Constant' selected for both. The 'Minimum' value is 1.00 and the 'Maximum' value is 9,999,999.00.

The screenshot displays the 'Packaging Rules 2' configuration page. At the top, there are navigation tabs: 'IM Target', 'Equity Rule', 'Packaging Limits', 'Packaging Rules 1', and 'Packaging Rules 2'. Below the tabs, the following information is visible:

- Academic Institution: WA College
- Aid Year: 2020
- Academic Career: UGRD Academic Career
- Plan ID: SUFAWISP

Below this information, there are several sections:

- Effective Date:** 06/15/2016
- Status:** Active
- Processing Order:** 10
- Item Type Defaults:** This section includes a table with the following data:
 

Sequence Nbr	Item Type
10	911000000000 Federal Pell Grant

 Below the table, the 'Award Action' is set to 'Offer/Accept'.
- Disbursement Plan:** This section has two radio buttons: 'Use Item Type Default' (unselected) and 'Override Default' (selected). The 'Disbt Plan' is set to '09' with a search icon, and the text 'Summer-Fall-Winter-Spring' is displayed.
- Split Code:** This section also has two radio buttons: 'Use Item Type Default' (unselected) and 'Override Default' (selected). The 'Split Code' is set to 'U4' with a search icon, and the text 'Sumr-Fall-Winter-Spring' is displayed.

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** PACKAGE\_PLAN\_TABLE

**Page:** Packaging Plan, Packaging Rules 1, Packaging Rules 2

**Action:** A/UD/DA/C

## Repackaging Plan

The repackaging plans configured are to repackage loans that are not included in packaging plans used for initial packaging. They are to be used to award sequestration specific item types.

### Repackaging Plan

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

**Search Criteria**

Academic Institution    
 Aid Year    
 Academic Career    
 Repackaging Plan ID    
 Description

Include History
  Correct History
  Case Sensitive

**Search Results**

View All First 1-11 of 11 Last

Academic Institution	Aid Year	Academic Career	Repackaging Plan ID	Description
WA	2020	UGRD	LOAN-F	Loans - Fall
WA	2020	UGRD	LOAN-FW	Loans - Fall-Winter
WA	2020	UGRD	LOAN-FWS	Loans - Fall-Winter-Spring
WA	2020	UGRD	LOAN-R	Loans - Summer
WA	2020	UGRD	LOAN-RF	Loans - Summer-Fall-Winter
WA	2020	UGRD	LOAN-RFW	Loans - Summer-Fall
WA	2020	UGRD	LOAN-RFWS	Loans - Sum-Fall-Winter-Spring
WA	2020	UGRD	LOAN-S	Loans - Spring
WA	2020	UGRD	LOAN-W	Loans - Winter
WA	2020	UGRD	LOAN-WS	Loans - Winter-Spring
WA	2020	UGRD	REPACK	REPACKAGING

### Repackaging Plan

Academic Institution WA College  
 Academic Career UGRD Academic Career  
 Aid Year 2020  
 Repackaging Plan ID LOAN-RFWS

**Repackaging Target** Find First 1 of 1 Last

\*Effective Date 08/16/2018  \*Status Active   
 \*Description Loans - Sum-Fall-Winter-Spring  
 \*Award Period Both Academic & Non Std   
 FM Need Target  Constant  Equation  Percent  
 IM Need Target  Constant  Equation  Percent  
 \*Processing Order 10    
 Short Description SuFaWiSp  
 Selection Criteria CTCFAPUFW    
 % Need FM 100.0  
 % Need IM 100.0

**Repackaging Rule** Find View All First 1 of 4 Last

Rule Nbr 10   
 Repackaging Rule Increase   
 Need Threshold Federal unmet need   
 Method Item Type   
 Item Type 961000001110  Sequence Last   
 Subsidized Direct Ln 1-New Fee  
 Disbursement Plan 47  Split Code L4   
 Minimum  Constant  Equation 100.00  
 Maximum  Constant  Equation CTCFALCASUB3    
 Tolerance 100.00  
 Action Offer/Accept

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Repackaging Plan

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2  
**Component:** SFA\_RPKG\_PLAN\_TBL  
**Page:** SFA\_RPKG\_PLAN\_TBL  
**Action:** A/UD/DA/C

## Award Adjustment Reasons

Award adjustment reasons are institutionally defined reasons indicating why an award may be adjusted. Award adjustment reasons can be used for clarification when modifying an award and also for statistical tracking purposes. You can enter an award adjustment reason any time that you change an award on the award entry pages, but award adjustment reasons are required on the Professional Judgement page.

**Award Adjustment Reasons**

Institution WA College

Aid Year 2020 2019-2020 Financial Aid Year

Copy

Find | View All First 1 of 1 Last

*Code	Description	Long Description
ADJ	Adjustment	FA Award Adjustment

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Award Adjustment Reasons

### Security:

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

**Menu:** DESIGN\_FINANCIAL\_AID1  
**Component:** AWRD\_ADJ\_RSN\_TBL  
**Page:** AWRD\_ADJ\_RSN\_TBL  
**Action:** A/UD/DA/C

## Award Messages

Define award messages that can be linked to financial aid item types.

Using configured values.

The screenshot shows the 'Award Messages' interface. At the top, it displays 'SetID WA' and 'Aid Year 2020' with '2019-2020 Financial Aid Year' below it. A 'Copy' button is visible. Below this is a navigation bar with 'Find | View All' and 'First 1-4 of 7 Last'. The main content is a table with columns '\*Code' and 'Description'. The table contains four rows:

*Code	Description
CBS	You have been awarded a College Bound Scholarship. To maintain eligibility you: Must be a Washington State resident; Cannot be pursuing a degree in theology; Have not already received a two-year degree; Are not in default on a loan made through a state conditional loan or conditional scholarship; Must have graduated from a Washington State high school with at least a 2.0 cumulative GPA; Must meet 65% Median Family Income requirement as defined by the Washington Student Achievement Council; Must be enrolled in at least 3 credits, as an undergraduate student in a financial aid eligible program.  Financial Aid counseling for State Need Grant recipients is available at: <a href="http://www.opportunitypathway.wa.gov">www.opportunitypathway.wa.gov</a>
INST	You have been awarded an Institution Grant. To maintain eligibility, you must be a Washington State resident and enrolled in at least three (3) units.
LOAN	You have been offered a Subsidized and/or Unsubsidized Direct Loan. You are not required to accept a loan and you may decline all or part of these amounts. You should only accept the amount of loan you need to meet your school related expenses. You can find out more information about student loans at <a href="https://studentaid.ed.gov/sa/types/loans">https://studentaid.ed.gov/sa/types/loans</a> . You must be registered for at least six (6) credits that count toward your current program of study. Loans must be repaid after you graduate, and/or stop attending at less than 1/2 life (less than 6 credits). If no other aid is available, your loan funds will be applied toward your current tuition and fee balance prior to being disbursed to you. If you would like to accept your offered loan, you must accept via the student center.  FIRST-TIME BORROWERS: As a first-time borrower in the first year of your program, loan funds cannot be disbursed until the 31st day of your first term. If you are eligible for loans only, you will have your tuition deferred until loan funds can be disbursed ONLY if their loan amount is sufficient to cover the full tuition amount.
OG	You have been awarded funds through the Opportunity Grant Program. To maintain eligibility, you must be a Washington State resident and have a family income at or below 200% of the federal poverty level.

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Award Messages

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** AWARD\_MESSAGES

**Page:** Award Messages

**Action:** A/UD

## Loan Fee Setup

Set up loan fees in the Loan Fee Table to ensure that the correct loan fees are deducted from each loan financial aid item type at the time of awarding. Loan fees are origination and insurance fees that are deducted from the gross amount of the loan. When defining a loan financial aid item type, attach the appropriate loan fees on the FA Item Type 6 page. Remember to create loan fee information for all loan types at your institution.

## Loan Fee Table

Aid Year 2020

SetID WA

Loan Fee OR2

**Details** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL Sub/Unsub-Orig Fee Pre-Seq Short Descr DLOriginPre

\*Loan Fee Type 0 Originatn

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 1.062 % Loan Fee Amount \$0.00

Loan Fee OR3

**Details** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL Sub/Unsub-Orig Fee Post Seq Short Descr DLOriginPost

\*Loan Fee Type 0 Originatn

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 1.059 % Loan Fee Amount \$0.00

Loan Fee PO2

**Details** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL PLUS - Orig Fee Pre-Sequest Short Descr DLPLOrPre

\*Loan Fee Type 0 Originatn

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 4.248 % Loan Fee Amount \$0.00

Loan Fee PO3

**Details** Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL PLUS-Orig Fee Post Sequest Short Descr DLPORPost

\*Loan Fee Type 0 Originatn

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 4.236 % Loan Fee Amount \$0.00

Loan Fee PR1

Details Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL PLUS - Rebate Fee Pre-Seq Short Descr DLPLRbPre

\*Loan Fee Type R Rebate

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 0.000 % Loan Fee Amount \$0.00

---

Loan Fee PR2

Details Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL PLUS - Rebate Fee Post Seq Short Descr DLPLRbPst

\*Loan Fee Type R Rebate

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 0.000 % Loan Fee Amount \$0.00

Loan Fee RB1

Details Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL Sub/Unsub-RebateFee Pre-Seq Short Descr DLRebPre

\*Loan Fee Type R Rebate

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 0.000 % Loan Fee Amount \$0.00

---

Loan Fee RB2

Details Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

\*Description DL Sub/Unsub-RebateFee Pst Seq Short Descr DLRebPost

\*Loan Fee Type R Rebate

\*Loan Fee Option Percentage

\*Loan Fee Rule Weighted Across Disbursements

Loan Fee Percent 0.000 % Loan Fee Amount \$0.00

**Navigation:** Set Up SACR > Product Related > Financial Aid > Awards > Loan Fee Setup

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** LOAN\_FEE\_TABLE

**Page:** LOAN\_FEE\_TABLE

**Action:** A/UD

## External Award Cross Reference

Use this page to map Type and Source values that you entered on the External Award Type page and the External Award Source page to an existing financial aid item type. You can map many external awards with similar attributes to the same financial aid item type. For example, a school can combine several outside scholarship programs in a single financial aid item type. The external award attributes may differ, but all map to the same financial aid item type.

External Award Cross Reference

Academic Institution WA College Aid Year 2019-2020  Enable Sequencing Copy

*Award Type	*Source	Program Code	*Item Type	Description	Self Service		
GNT	SB	BFB	912000000410	BFET Books	<input type="checkbox"/>	+	-
GNT	SB	BFT	912000000400	BFET Tuition	<input type="checkbox"/>	+	-
GNT	SB	OGB	912000000310	Opportunity Grant Books	<input type="checkbox"/>	+	-
GNT	SB	OGT	912000000300	Opportunity Grant Tuition	<input type="checkbox"/>	+	-
GNT	SB	WFB	912000000610	WorkFirst Books	<input type="checkbox"/>	+	-
GNT	SB	WFT	912000000600	WorkFirst Tuition	<input type="checkbox"/>	+	-
GNT	SB	WRB	912000000510	Worker Retraining Books	<input type="checkbox"/>	+	-
GNT	SB	WRT	912000000500	Worker Retraining Tuition	<input type="checkbox"/>	+	-
WRK	ATH	AWW	920000000070	Athletic Waiver	<input type="checkbox"/>	+	-
WRK	PAY	FOF	931000000100	Federal Work Study Off Campus	<input type="checkbox"/>	+	-
WRK	PAY	FON	931000000000	Federal Work Study	<input type="checkbox"/>	+	-
WRK	PAY	IWS	933000000000	Institutional Work Study	<input type="checkbox"/>	+	-
WRK	PAY	SOF	932000000100	State Work Study Off Campus	<input type="checkbox"/>	+	-
WRK	PAY	SON	932000000000	State Work Study	<input type="checkbox"/>	+	-

**Navigation:** Set Up SACR > Product Related > Financial Aid > External Awards > Item Type Cross Reference

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** SFA\_EA\_TYPE\_XREF

## Search/Match Rules

Define search and match criteria for use by the External Award Load process. The External Award Stage process uses the Search/Match utility when running the External Load for an external file. You create your own search/match rules and search/match parameters for each File Mapping definition. The process determines whether an existing ID matches a transaction identified within an external award data file. Each external award data file must be related to a File Mapping definition defined within the File Parser utility.

External Award Search Match Rules			
Institution	WA	College	
Aid Year	2019-2020		
File Mapping	CTC_FA_EXTERNAL_AWARDS_FWS		
Search Parameter	FA_EXTAWD	ExtAwd	SSN,DOB, Lname4, Fname2
<b>No Match Found</b>			
	Update	Suspend	Ignore
New	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Match(es) Found</b> Find First 1-5 of 5 Last			
One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
			Order Nbr 10 SSN, DOB, Lname4, Fname2
One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
			Order Nbr 20 DOB, Lname10, Fname2
One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
			Order Nbr 30 SSN, Lname8, Fname2
One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
			Order Nbr 40 SSN, DOB
One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
			Order Nbr 50 SSN only

**Navigation:** Set Up SACR > Product Related > Financial Aid > External Awards > Search/Match Rules

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** SFA\_EA\_SRCH\_MATCH

**Page:** SFA\_EA\_SRCH\_MATCH

**Action:** A/UD

# Set Up Disbursement Calendars

Define the parameters for the batch authorization and disbursement processes.

The Authorization Calendar needs to be manually entered.

The Disbursement Calendar has a bit of manual entry but most of it is derived from the disbursement ID data.

**Origin** This value must be coordinated with SF to make sure the disbursement postings are categorized correctly.

Auth Calendar Effective Date		Find	First	1 of 1	Last	
*Eff Date	01/01/1901	Status	Active			
Career/Term Auth Calendar		Find	View 3	First	1-4 of 4	Last
*Career	UGRD	Academic	*Term	2195	SUMMER 2019	
	<input checked="" type="checkbox"/>	Reauthorize All Aid				
*Career	UGRD	Academic	*Term	2197	FALL 2019	
	<input checked="" type="checkbox"/>	Reauthorize All Aid				
*Career	UGRD	Academic	*Term	2201	WINTER 2020	
	<input checked="" type="checkbox"/>	Reauthorize All Aid				
*Career	UGRD	Academic	*Term	2203	SPRING 2020	
	<input checked="" type="checkbox"/>	Reauthorize All Aid				

[Authorization Calendar](#) | [Disbursement Calendar](#)

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

---

**Disbursement Calendar Effective Date** Find 1 of 1 Last

\*Eff Date 01/01/1901      Status Active      Assign To

SetID WA130      \*Origin 0000      \*Group Type FinAid

---

**Career/Term/Item Type Disb Calendar** Find First 1 of 4 Last

\*Career UGRD Academic      \*Term 2203 SPRING 2020      Cutoff Date 06/22/2020

All Types       Except Items

---

**Selected Plans/Id's** Find | View All First 1-2 of 24 Last

Disbt Plan 55 Ln Spring Only 30 Day	Disbt ID 02 Spring Disbursement 2	Disb Date 05/16/2020
Disbt Plan 55 Ln Spring Only 30 Day	Disbt ID 01 Spring Disbursement 1	Disb Date 05/06/2020

**Navigation:** Set Up SACR > Product Related > Financial Aid > Disbursement > Set Up Disbursement Calendars

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** AUTH\_CALENDER

**Page:** Authorization Calendar, Disbursement Calendar

**Action:** DA/C

## Define Item Type Rules

Define authorization rules for a financial aid item type. Select specific rules used to hold disbursements of financial aid monies.

For your institution specific define item type rules, run queries:

- CTC\_FA\_GC\_AYRO\_DISB\_RULES\_IT
- CTC\_FA\_GC\_AYRO\_DISB\_RULES\_CHKL
- CTC\_FA\_GC\_AYRO\_DISB\_RULES\_SI
- CTC\_FA\_GC\_AYRO\_DISB\_RULES\_UEM

Indicators   Groups/Thresholds   Checklists/Tracking

Item Type 911000000000Federal Pell Grant      Aid Year 2020  
 Academic Career: Academic Career      Institution WA

**Indicators**      Find      First      1 of 1      Last

Eff Date 01/01/2001      Status Active      Copy Setup Data + -

Descr Federal Pell Grant      Short Desc PELL

---

<input checked="" type="checkbox"/> Review Complete	<input type="checkbox"/> Awd Career Match Term Career
<input checked="" type="checkbox"/> Package Complete	<input type="checkbox"/> Honor Disbursement Hold <input checked="" type="checkbox"/> Post Disb Reduction Control
<input checked="" type="checkbox"/> Verification Complete	<input checked="" type="checkbox"/> Must Meet Satisfactory Prog
<input checked="" type="checkbox"/> Official Fed EFC	<input checked="" type="checkbox"/> Hold Disb Fed Overaward
<input type="checkbox"/> NSLDS Loan Year Match	<input type="checkbox"/> Hold Disb Inst Overaward
<input type="checkbox"/> Bdgt/Term Level Match	<input checked="" type="checkbox"/> Hold If Withdrawn
<input checked="" type="checkbox"/> Hold If No Enrollment Data	<input type="checkbox"/> Match Fees
<input type="checkbox"/> Loan Entrance Intervw Req	<input type="checkbox"/> Authorize To Fee Assessment

---

**Load Level Rules**

<input type="checkbox"/> Bdgt/Term Load Match	Disbursement Proration Rule <input type="text"/>
<input checked="" type="checkbox"/> Awd/Term Load Match	Use Current Load <input type="text"/>

Indicators   Groups/Thresholds   Checklists/Tracking

Item Type 911000000000Federal Pell Grant      Aid Year 2020  
 Academic Career Academic Career      Institution WA

**Thresholds**      Find      First      1 of 1      Last

Eff Date 01/01/2001      Status Active      Description Federal Pell Grant      + -

---

Ethnic Group <input type="text"/>	Res State <input type="text"/>
Acad Stand Hold <input type="text"/>	Country <input type="text"/>
Form of Study <input type="text"/>	Group <input type="text"/>
Sport <input type="text"/>	Acad Plan <input type="text"/>
Athletic Participation Code <input type="text"/>	Sub-Plan <input type="text"/>

---

FFELP Tolerance Amount <input type="text" value="\$0"/>	Tolerance Amount <input type="text" value="\$0"/>
---	---

---

Min GPA on FA Term <input type="text" value="0.000"/>	Use Current Units <input type="text"/>
Min GPA Prior FA Term <input type="text" value="0.000"/>	
Minimum Units <input type="text" value="0.00"/>	

Indicators | Groups/Thresholds | **Checklists/Tracking**

Item Type: 911000000000Federal Pell Grant      Aid Year: 2020  
 Academic Career: Academic Career      Institution: WA

**Tracking/Messages**      Find    First 1 of 1 Last

Eff Date: 01/01/2001    Status: Active    Description: Federal Pell Grant

Checklists	Find	First	1-2 of 44	Last	Tracking	Find	First	1 of 1	Last
ELC000 Birth Certificate									
ELC005 GED									

**Service Impact**      Find    First 1-2 of 3 Last

FDHLD FA Disbursement Hold				
FRHLD FA Refund Hold				

**User Edit Messages**      Find | View All    First 1 of 5 Last

Type: Error    Msg Code: ACDPLN    Monitor Academic Plan

**Navigation:** Set Up SACR > Product Related > Financial Aid > Disbursement > Define Item Type Rules

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** DISB\_RULE\_ITEM

**Page:** Indicators & Checklists/Tracking

**Action:** A/DA/C

## Create User Edit Messages

These messages are financial-aid-specific indicators that the disbursement processes can use to prevent authorization of item types at the term level.

### User Edit Messages

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

Search by: Academic Institution = WA

Search   Advanced Search

#### Search Results

View All   First   1-6 of 6   Last

Academic Institution	Edit Message Type	Edit Message Code	Description
WA	Error	ACDCHG	Academic Plan Change
WA	Error	ACDPLN	Monitor Academic Plan
WA	Error	CODMRR	COD Multiple Reporting
WA	Error	DSBHLD	FA Disbursement Hold
WA	Error	REMDAL	Max Remedial Credits Taken
WA	Error	RPTCRS	Student Has Repeat Courses

### User Edit Messages

Institution WA   College

#### Edit Message

Find | View All   First   1 of 1   Last

Edit Message Type E   Error

\*Edit Message Code ACDCHG   + -

\*Description Academic Plan Change

Short Desc AcdPlanChg

Comment User must enter exactly (and ONLY) the 6-character value of the Academic Plan as listed in the Academic Plan field on the FA Term page.

**Navigation:** Set Up SACR > Product Related > Financial Aid > Disbursement > Create User Edit Messages

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** USER\_EDIT\_MSGS

**Page:** FA\_EDIT\_MSG\_TBL

**Action:** A/DA/C

## Credential Cross Reference

Maps academic career/academic program/academic plan/National Student Clearinghouse (NSC) Classifications combinations to COD Credential Levels.

Credential Level Cross Reference

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

Retrieve from Acad Plan Copy

Personalize | Find | View 100 | First 1-20 of 287 Last

*Academic Career	Academic Program	*Academic Plan	NSC Classification	Credential Level
UGRD	PRFTC	ATBATAPT	Associate's Degree	Associate's degree
UGRD	ACADM	CISNEAA	Associate's Degree	Associate's degree
UGRD	PRFTC	ECTEIAPT	Associate's Degree	Associate's degree
UGRD	PRFTC	MCTMTAPT	Associate's Degree	Associate's degree
UGRD	ACADM	ENTTEAS	Associate's Degree	Associate's degree
UGRD	PRFTC	ELEIMAPT	Associate's Degree	Associate's degree
UGRD	ACADM	MUSMUA	Associate's Degree	Associate's degree
UGRD	ACADM	CTECEAS	Associate's Degree	Associate's degree
UGRD	PRFTC	FOGPPAPT	Associate's Degree	Associate's degree
UGRD	PRFTC	FOTFTAPT	Associate's Degree	Associate's degree
UGRD	PRFTC	BAMBMAPT	Associate's Degree	Associate's degree
UGRD	PRFTC	BAMEVAPT	Associate's Degree	Associate's degree
UGRD	PRFTC	ECEECAPT	Associate's Degree	Associate's degree
UGRD	PRFTC	INPSDAPT	Associate's Degree	Associate's degree
UGRD	PRFTC	ECTINAPT	Associate's Degree	Associate's degree

**Navigation:** Set Up SACR > Product Related > Financial Aid > COD > Credential Cross Reference

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** SFA\_COD\_CRDLV\_XREF

**Page:** SFA\_COD\_CRDLV\_XREF

**Action:** A/DA/C

# SULA Load Table

SULA Load Rules page is used to define COD Enrollment Status (SULA) loads for reporting purposes to COD.

**SULA Load Table**

Copy Setup Data

Institution WA College  
 Aid Year 2020 2019-2020 Financial Aid Year  
 Career UGRD Academic Career

Academic Program	Academic Plan	*Term Category	SULA Unit Total	*SULA Load
1		Regular Term	1.000	Less than Half-time
2		Regular Term	6.000	Half-time
3		Regular Term	9.000	Three-Quarter time
4		Regular Term	12.000	Full-time
5		Summer Term	1.000	Less than Half-time
6		Summer Term	6.000	Half-time
7		Summer Term	9.000	Three-Quarter time
8		Summer Term	12.000	Full-time

**Navigation:** Set Up SACR > Product Related > Financial Aid > COD > SULA Load Rules

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** SFA\_SULA\_LD\_TBL

**Page:** SFA\_SULA\_LD\_TBL

**Action:** A/DA/C

## Loan Destination Profile

Consolidate the loan participants - the lender, guarantor, and servicer - into one entity, the loan destination. The loan destination defines the business characteristics and protocols between a lender, guarantor, and servicer, which enables them to process loans for the school. You must

create a loan destination profile for each lender in the alternative loan program, and for the direct lending servicer for direct loans.

**SBCTC will not be automating the transmission for CommonLine loans. All areas Decision/Recommendation section in referencing CommonLine loans will be N/A. This decision has been added to the decision log as of 1/29/14.**

Loan Destination Profile    CommonLine Options    Loan Destination Edits

Aid Year 2020    2019-2020 Financial Aid Year    Institution WA

**Loan Destination Profile**

Destination 2    Loan Program: Alternativ    Tolerance 0.00  
 Description Sallie Mae    Short Description Sallie Mae    Preferred Lender

**Destination Components**

Guarantor ID 2	SMSmartOp	OE Cd 924	Ovrd: <input type="checkbox"/>	Pre Guarantee Contact Servicer
Lender ID 1	SM SmartOp	OE Cd 900905	Branch 0000	Pre-Disb Contact Servicer
Servicer ID 2	Sallie Mae	OE Cd 900905	Branch 0000	Post Disb Contact Servicer

Physical Destination Servicer

**Valid Category/Process Level**    Find | View All    First 1 of 1 Last

Loan Category Alternativ     Track PN    Proc. Level Print and Guarantee

Loan Destination Profile    CommonLine Options    Loan Destination Edits

Aid Year 2020    2019-2020 Financial Aid Year    Institution WA

Loan Destination Num 2    Loan Program Alternativ    Sallie Mae

**Change Transaction Destination**

Pre Disbursement Destination Servicer    Destination ID 2 Sallie Mae  
 Post Disbursement Destination Servicer    Destination ID 2 Sallie Mae

**Build Options**

Use CommonLine Version CL 4	Stafford App Form Default
<input checked="" type="checkbox"/> Accept Change Records	Serial MPN Process Default
<input checked="" type="checkbox"/> Create CL Alt @4	Prom Note Delivery Default Paper
<input type="checkbox"/> Create CL Ref @5	Disb Hold/Release Default Not Supported
<input type="checkbox"/> Create CL Ref Sup @7	Funds Return Method Code Electronic Fund Transfer

Loan Destination Profile    CommonLine Options    Loan Destination Edits

Aid Year 2020    2019-2020 Financial Aid Year    Institution WA

**Loan Destination Profile**

Destination 2    Sallie Mae    Loan Program:    Alternativ

**Default Profile Edits**    Find    First 1 of 1 Last

Loan Category:    Alternative Loan    Prom Note Tracking Status: No

Proc. Level:    Print and Guarantee

Find | View All    First 1 of 1 Last

\*Equation Name     Loan Dest Nbr is Zero

Loan Requirement Status: Required     Loan Edit Activated

**Navigation:** Set Up SACR > Product Related > Financial Aid > Loans > CommonLine 4 > Create Loan Destinations

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** LN\_DEST\_PROFILE

**Page:** LN\_DEST\_PROFILE LN\_DEST\_PROFILE2

**Action:** A/DA/C

## Define Loan Counseling Options

Defines the entrance and exit interview URLs and associated attribute.

The image displays two screenshots of a web application interface for defining loan counseling options. The top screenshot shows the 'Loan Code Setup' section, which includes fields for 'Loan Code' (STAF), 'Source' (Federal), and 'Loan Type' (Federal Stafford). The bottom screenshot shows the 'Loan Counseling Setup' section, which includes 'Entrance Interview Requirement' and 'Exit Interview Requirement' sections. Each section has radio buttons for 'Required Once' and 'Required Annually', and a text field for 'Entrance Counseling URL' or 'Exit Counseling URL' with the value 'http://www.studentloans.gov'. There is also a checkbox for 'Use Default Exit Date' and a field for 'Exit Date Calculation Choice' set to 30.

**Navigation:** Set Up SACR > Product Related > Financial Aid > Loans > Loan Counseling > Define Loan Counseling Options

**Security:**

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

**Menu:** PROCESS\_LOANS

**Component:** SFA\_LN\_CNLSL\_SETUP

**Page:** SFA\_LN\_CNLSL\_SETUP

**Action:** A/DA/C

## Set DL Loan Counseling Search

Define search and match criteria for use when processing COD loan entrance data.

Loan Counseling Search/Match Parameters

\*Institution

\*Search Parameter   fa isir load search/match

**No Match**

New:  Add  Update  Suspend

**Match(es) Found** Find  First 1-5 of 5 Last

Order Nbr	10	SSN, DOB, Lname4, Fname2	<input checked="" type="radio"/>	<input type="radio"/>
One Match:				
Order Nbr	20	DOB, Lname10, Fname2	<input type="radio"/>	<input checked="" type="radio"/>
One Match:				
Order Nbr	30	SSN, Lname6, Fname2	<input type="radio"/>	<input checked="" type="radio"/>
One Match:				
Order Nbr	40	SSN, DOB	<input type="radio"/>	<input checked="" type="radio"/>
One Match:				
Order Nbr	50	SSN only		

**Navigation:** Set Up SACR > Product Related > Financial Aid > Loans > Loan Counseling > Set DL Loan Counseling Search

**Security:**

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

**Menu:** PROCESS\_LOANS

**Component:** SFA\_LN\_CNLSL\_SETUP

**Page:** SFA\_LN\_CNLSL\_SETUP

**Action:** A/DA/C

## Define Loan Institutions

Define the valid loan processes available at the institution.

For alternative loans it is recommend selecting the Check Prior Year Destination checkbox as it will automatically select the lender used the previous year.

SSN Source (social security number source) -For direct loan and COD processing. Select the source of the student's Social Security Number, such as from PeopleSoft Enterprise Campus Community Fundamentals.

For DL, best practice is to use the ISIR for the SSN source.

Loan Institution Table | Loan Destination Default

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

School Code	Branch	Description	Short Description	Career
00	00	COLLEGE		Academic

**Loan Processing Info**

FFELP/Direct Participant: All Loan Programs  
 DL Disclosure Print: LOC Prints Disclosure  
 SSN Source: ISIR

DUNS ID: 3  
 DL SchCd: GC  
 COD Routing ID: 63

Institution Address

COD Full Participant     DL Serial MPN Activation     EDE Special School

**Contact Information** Find | View All First 1 of 2 Last

Contact Nbr: 1    Name: Wilkinson, L    Title: Loan Specialist    Func Area: Loan Processing

Loan Institution Contact

Loan Institution Table | Loan Destination Default

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

School Code	Branch	Description	Short Description	Career
00	00	COLLEGE		Academic

**Default Loan Destination Parameters** Find | View 1 First 1-2 of 2 Last

\*Loan Program: Alternative

- Current Prom Note
- Current Year Originations
- Student Selected Lender
- Check Prior Year's Destination
- Check NSLDS for Guarantor
- Default Destination
  - Use CRC Destination
  - 2 Sallie Mae

---

\*Loan Program: Direct Lending

- Current Prom Note
- Current Year Originations
- Student Selected Lender
- Check Prior Year's Destination
- Check NSLDS for Guarantor
- Default Destination
  - Use CRC Destination
  - 1 Direct Lending

**Navigation:** Set Up SACR > Product Related > Financial Aid > Loans > Define Loan Institutions

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** LOAN\_INST\_TABLE

**Page:** LOAN INSTITUTION TABLE

**Action:** A/UD

## Create Loan Types

Defines the types of loans that is used in the loan origination processes.

Loan Type Table | CommonLine/NSLDS Xref | Direct Loan Options | Checklist Setup

Aid Year: 2020 2019-2020 Financial Aid Year      Academic Institution: WA

Loan Type: DPL1    Description: PLUS Loan1    Short Description: PLUS Loan1     Do Not Copy

**Processing**

Loan Category: PLUS

Graduate PLUS Indicator

Loan Program: Direct Lending

Loan Refund Indicator: Borrower

**Requirements**

Loan References Required    Nbr Ref Rq:

Credit Check Required    \*Max Nbr Disbs: 20

Loan Cosigner Required    Nbr Csg Rq:

Cosigner Required Amt: \$0    Min Loan Amt: 100

**Loan Item Types**    \*SetID: WA    \*Item Type: 961000004100    PLUS Loan - Parent 1

**Loan Fees**

Loan Fee	Description	Loan Fee Amount	Loan Fee Type	Ln Fee Pct
PO2	DL PLUS - Orig Fee Post 7/1		O	4.248
PR1	DL PLUS - Rebate Fee Pre 7/1		R	

Loan Type Table | CommonLine/NSLDS Xref | Direct Loan Options | Checklist Setup

Aid Year: 2020 2019-2020 Financial Aid Year      Academic Institution: WA

Loan Type: DPL1    PLUS Loan1    Loan Program: Direct Lending    Loan Category: PLUS

**Valid CommonLine Codes**

Alternative Loan Type Cd:

**Valid NSLDS Codes**    Find | View All    First    Last

NSLDS Loan Type: D4    Direct PLUS (Parent)

<a href="#">Loan Type Table</a>	<a href="#">CommonLine/NSLDS Xref</a>	<a href="#">Direct Loan Options</a>	<a href="#">Checklist Setup</a>
Aid Year 2020 2019-2020 Financial Aid Year		Academic Institution WA	
Loan Type DPL1 PLUS Loan1			
Loan Program Direct Lending	Loan Category PLUS		
<b>Direct Loan Options</b>			
Days to Add to Inserted Disb <input type="text"/>	DL Disbursement Option	Disburse on Orig & PNote Ack <input type="button" value="v"/>	
	DL Transmit Disb Option	Transmit Disb on Orig Ack <input type="button" value="v"/>	
/			
<a href="#">Loan Type Table</a>	<a href="#">CommonLine/NSLDS Xref</a>	<a href="#">Direct Loan Options</a>	<a href="#">Checklist Setup</a>
Aid Year 2020 2019-2020 Financial Aid Year		Academic Institution WA	
Loan Type DPL1 PLUS Loan1	Checklist <input type="text"/>		<input type="button" value="Q"/>
Loan Program: Direct Lending	Loan Category:	PLUS	

**Navigation:** Set Up SACR > Product Related > Financial Aid > Loans > Create Loan Types

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** LOAN\_TYPE

**Page:** LOAN\_TYPE\_TABLE

**Action:** A/UD

## Direct Loan Change Rules

Configured values keep loan changes from reporting when the change is the value configured.

**DL Loan Institutional Change Setup**

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

**DL Change Parameters** Find | View All First 1 of 1 Last

*Chg Field#	Description	DL Change Type	*Change Parm
126	Student E-Mail Address	Demographic	Suspend All Changes

**Navigation:** Set Up SACR > Product Related > Financial Aid > Loans > Direct Loan Change Rules

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** LN\_DL\_INST\_PARM

**Page:** LN\_DL\_INST\_PARM

**Action:** A/UD

## Loan Attended Routing ID

Associate Attended School Routing ID's with Reporting School Routing ID's.

**Loan Attended Routing ID**

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

Reporting School Routing ID 6 COLLEGE

Personalize | Find | [?] [grid icon] First 1 of 1 Last

*Attended School Routing ID		
6	COLLEGE	

**Navigation:** Set Up SACR > Product Related > Financial Aid > Loans > Loan Attended Routing ID

**Security:**

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

**Menu:** PROCESS\_LOANS

**Component:** SFA\_COD\_LN\_ATTEND

**Page:** Loan Attended Routing ID

**Action:** A/UD

## Pell Payment

Define Pell payment information to include Pell IDs and other reporting data for Pell payment records to COD.

The screenshot shows the 'Pell Payment Setup' form with the following fields and values:

- Software Provider ID:** PEOPLESOF
- Institution Type:** 2 years, less than 3 years
- Academic Calendar:** Use standard quarters
- Payment Methodology:** Formula 1
- Financial Control:** Public
- Low T & F Flag:** (empty)
- Hours/Credits in Acad Year:** 36
- Pell Just In Time Institution:**
- \*Pell ID Reporting 00:** (empty)
- \*TG Number:** 53012
- Weeks in Program Acad Year:** 36
- OPE ID Number:** 00000000
- Maximum Pell Award:** 6195
- Max EFC:** 5578
- Disbursement Request Offset:** (empty)
- SFA Common School ID:** 6
- COD Full Participant:**

Additional UI elements include a 'Copy Pell Payment Option' button, a search bar, and navigation links like 'Find | View All', 'First', '1 of 1', and 'Last'.

Pell Payment Setup | Pell Institution Address

### Institutions Address

Aid Year 2020 Academic Institution WA

**Address Information** Find First 1 of 1 Last

Pell ID Reporting 00

FAA Name Mc

FAA Phone Number

FAA Fax Number

Internet Address MI@.edu

**Pell Processing Options**

<input type="checkbox"/> Originate Offered Awards	<input checked="" type="checkbox"/> Hold Corrections
<input checked="" type="checkbox"/> Use Fulltime Enrollment	<input checked="" type="checkbox"/> Disb Prior to Transmitting Rec
<input type="checkbox"/> Originate Max Pell Award	<input checked="" type="checkbox"/> Payment Period Start Date Req

**Navigation:** Set Up SACR > Product Related > Financial Aid > Pell Grants > Pell Payment

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** PELL\_SETUP\_PNL

**Page:** Pell Payment Setup & Pell Institution Address

**Action:** UD

## Pell ID Attending

Enter the corresponding Common School ID for each Attended Pell ID on the Pell Attending page (PELL\_ATTENDING).

**Pell Attending**

Aid Year 2020      Academic Institution WA      Pell ID Reporting 00

**Attending Pell Info**      Find      First 1 of 1 Last

\*Attended Pell ID 00      \*Description COLLEGE      Campus MAIN

Common School ID 63

**Navigation:** Set Up SACR > Product Related > Financial Aid > Pell Grants > Pell ID Attending

**Security:**

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

**Menu:** DESIGN\_FINANCIAL\_AID2

**Component:** PELL\_ATTENDING

**Page:** Pell Attending

**Action:** UD

## ISIR Data Load Parameters

Define the rules used to load ISIRs from the staging to the application tables.

ISIR Load Options 1 | ISIR Load Options 2 | ISIR Load Options 3 | ISIR Inst SearchMatch

Aid Year 2020 2019-2020 Financial Aid Year School Cd 00

**ISIR Load Parameters** Find | View All First 1 of 1 Last

\*Eff Date 01/01/1901 Status Active

**ISIR Load Options**

Use Current Date As Effdt  Load NSLDS Data  
 Call INAS  Require FA Term

**Update Address Options**  Override Address Type

Discard Incoming Address  
 Add if blank - Do not update  
 Always Update

**Update Name Options**  Update

**Update Bio/Demo Options**  Update

**Update Email Options**  Discard Incoming EM  
 Add if blank  
 Always Update

**Update Phone Options**  Discard Incoming PH  
 Add if blank  
 Always Update

**Update Drivers License Options**  Discard Incoming DL  
 Add if blank  
 Always Update

ISIR Load Options 1 | ISIR Load Options 2 | ISIR Load Options 3 | ISIR Inst SearchMatch

Aid Year 2020 2019-2020 Financial Aid Year School Cd 00

**ISIR Load Parameters** Find | View All First 1 of 1 Last

Eff Date 01/01/1901 Status Active

**ISIR Routing Controls**

Student Status Add Level: 0 - Load everyone  
 Student Status Suspend Level: 0 - Anyone not loaded  
 Inst. Review Status Completed: Suspend Incoming Record  
 Ed Verification Completed: Suspend Incoming Record  
 ISIR Rejects: Load Record

**System Generated Load Option**

System Generated ISIR Action: Load Record

**EFC Override Option**

\*EFC Override Encountered: Suspend Incoming Record

Aid Year 2020 2019-2020 Financial Aid Year School Cd 00

**ISIR Load Parameters** Find | View All First 1 of 1 Last

Eff Date 01/01/1901 Status Active

**ISIR Corrections Load Options**

Suspend on EFC Mismatch
  Suspend Other School Initiated
  Suspend Student Initiated

**INAS Call Options**

Always Call INAS
  Call INAS if EFC Change

Store INAS Calc Request
  Never Call INAS

Aid Year 2020 2019-2020 Financial Aid Year School Cd 00

\*Search Parameter FA\_ISIR\_LOAD fa isir load search/match

**No Match Found**

Add Update Suspend Ignore  
 New:

**Match(es) Found** Find View 2 First 1-5 of 5 Last

Order Nbr 10 SSN, DOB, Lname4, Fname2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Order Nbr 20 DOB, Lname10, Fname2	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Order Nbr 30 SSN, Lname6, Fname2	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Order Nbr 40 SSN, DOB	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Order Nbr 50 SSN only	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**Navigation:** Set Up SACR > Product Related > Financial Aid > File Management > ISIR Data Load Parameters

**Security:**

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

- ZD SACR Financial Aid Config

**Menu:** EXCHANGE\_FIN\_AID\_DATA

**Component:** ISIR\_INST\_CONTROL

**Page:** ISIR Load Options 1 - 3, ISIR Inst SearchMatch

**Action:** A/UD/DA/C

## NSLDS Data Load Parameters

Define the rules used to load NSLDS Transfer Monitoring and History data from the staging to the loaded tables.

The screenshot displays the NSLDS Load Parameters configuration interface. It is divided into two main sections: 'NSLDS Load Parameters' and 'NSLDS Search/Match'.

**NSLDS Load Parameters:**

- Fields: School Code 00, Branch Code 00.
- Buttons: Find, View All, First, 1 of 1, Last.
- \*Effective Date: 01/01/1901
- Effective Status: Active
- TSM Alert Options:  Insert FA User Edit Message

**NSLDS Search/Match:**

- Fields: School Code 00, Branch Code 00.
- \*Search Parameter: FA\_NSLDS
- Search Button: FA NSLDS Load
- Message: No Match Found
- Action: Update, Suspend (selected), Ignore
- Match(es) Found: Find, View All, First, 1 of 1, Last
- Order Num: 10, SSN, FName3
- One Match:  (selected)
- Multiple Matches:

**Navigation:** Set Up SACR > Product Related > Financial Aid > File Management > NSLDS Data Load Parameters

### Security:

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

**Menu:** EXCHANGE\_FIN\_AID\_DATA

**Component:** SFA\_NSLDS\_LD\_CNTRL

**Page:** NSLDS Load Options & NSLDS Search/Match

**Action:** A/UD/DA/C

# Define SAP Setup Criteria \*\*\* UPDATED CONTENT \*\*\*

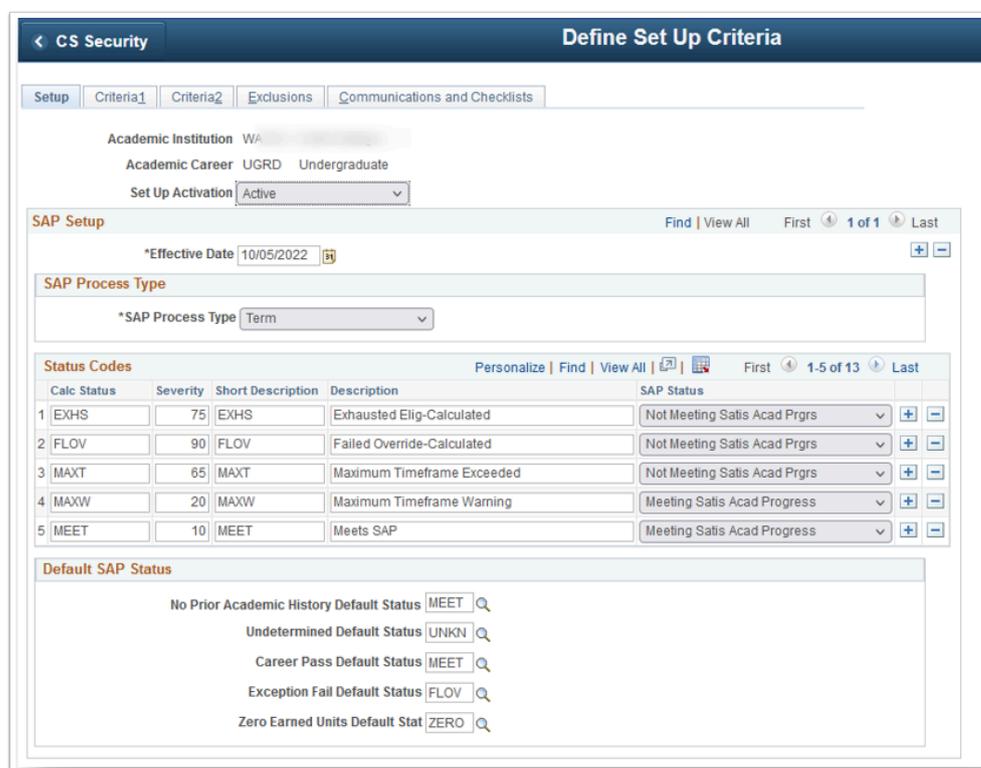
The SAP Setup pages are used to set up the standard rules used to determine a SAP status for each of the eight tests. The rules are designed to be failure rules. If a student's actual test value matches a setup rule, the test fails. If a student's actual test value does not meet a standard rule, the student receives the Career Pass Default Status code for that test, which is defined in the SAP Setup. For better processing performance, keep the rules as simple as possible.

Use the Define SAP Setup page to establish the SAP status codes, severity and rules by Academic Institution and Academic Career. The component is 'Effective Dated' thus enabling a college to make changes that apply as of a specific date.

When the SAP process is run either by individual student or in batch using the process scheduler, the SAP processes 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.

The **Define SAP Setup Criteria** component is comprised of 5 pages (tabs). Let's go over what is locally configurable on each of those pages:

## Setup Page



**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 | First 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

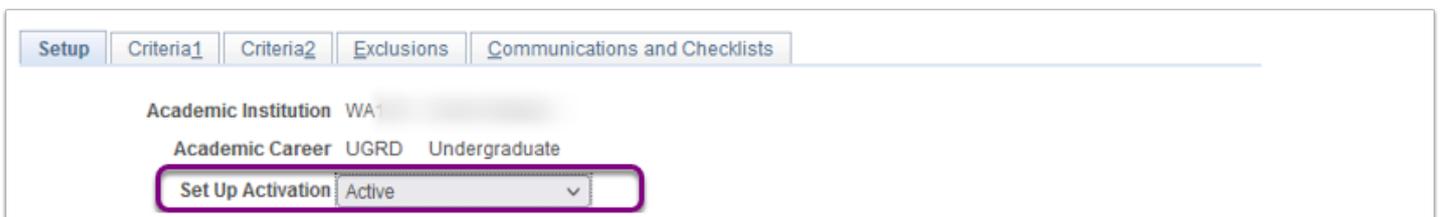
Exception Fail Default Status FLOV

Zero Earned Units Default Stat ZERO

## Set Up Activation

The **Set Up Activation** field defines whether the SAP setup is active or inactive at this institution, which impacts whether the SAP field is editable on the Packaging Status Summary page:

- When an Academic Institution has **ANY** Academic Career set to "Active" on the Setup Activation Field, students will appear on the Packaging Status Summary page with their Satisfactory Academic Progress field set to "display only" and a link to SAP Details shown.
- When an Academic Institution has **ALL** Academic Careers set to "Inactive" on the Setup Activation Field or are not defined, students will appear on the Packaging Status Summary page with their Satisfactory Academic Progress field that is editable, and the SAP Details link is **NOT** shown.
- No SAP processes (online, batch, and simulation processes) will run successfully for student SAP records in careers with an "Inactive" Setup Activation Field value.



The screenshot shows a web interface with a navigation bar containing tabs: Setup, Criteria1, Criteria2, Exclusions, and Communications and Checklists. Below the navigation bar, there are fields for 'Academic Institution' (with value 'WA') and 'Academic Career' (with value 'UGRD Undergraduate'). The 'Set Up Activation' field is highlighted with a red box and contains the value 'Active'.

In the **SAP Setup** section colleges can make 'Effective Dated' changes that apply "as of" a specific date. To view prior effective dated rows either click the **View All**, or navigate through by clicking the **First**, arrows or **Last** navigation options. If the display shows something other than **1 of 1**, you know that there have been other settings used in the past, or possibly settings that will take effect in the future. This may help in researching what may have happened due to a previous configuration setting when attempt to triage a student record with a confusing SAP history, especially if there have been changes in the staff person who has managed this configuration over time at your college.



The screenshot shows the 'SAP Setup' section. A red arrow points to the 'Effective Date' field, which contains the value '10/05/2022'. To the right, there is a navigation bar with buttons for 'Find | View All', 'First', '1 of 1', and 'Last'. The 'View All' button is highlighted with a red box.

## SAP Process Type

In the **SAP Setup** section, in the **SAP Process Type** sub-section set the process type to either Aid Year or Term.

**Aid Year:** Processing is for multiple terms, which you define on the Define Evaluation Aid Year page.

**Term:** Processing is for a single term, which you define on the Define Evaluation Term page.

The screenshot shows the 'SAP Setup' interface. At the top, there is a search bar with 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. Below this, there is a field for '\*Effective Date' with the value '10/05/2022'. The main section is titled 'SAP Process Type' and contains a dropdown menu labeled '\*SAP Process Type' with the value 'Term' selected. The dropdown menu is highlighted with a purple border.

## Status Codes

In the **SAP Setup** section, in the **Status Codes** sub-section establish the **Calc Status** codes, their severity, description(s) and **SAP Status** (outcome).

**1- 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.

1	2	3	4	5
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

**2- 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 two existing status values. The severity enables prioritization of the codes and will determine the Calc SAP Status code for a student if the student has a different Calc Status result (code) for each one 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.

When establishing or maintaining (in a new effective dated entry), be sure that:

- Each severity number is unique.
- The most severe status code has the highest severity number assigned to it.

**3- Short Description:** Enter a brief description of the Calc Status code.

**4- Description:** Enter a detailed description of the Calc Status code.

**5- SAP Status:** From the drop down menu, select one of the pre-defined (translate) values to associate with each **Calc Status**. The **SAP Status** is the status that appears in the Satisfactory Academic Progress field on the student's **Packaging Status Summary** page, as a "display only"

value on that page once you have established your "Active" Setup page. The options to choose from are:

- Not meeting Satisfactory Academic Progress
- Meets Satisfactory Academic Progress

## Default SAP Status

In the **SAP Setup** section, in the **Default SAP Status** sub-section set the Calc Status that aligns with the intended "Default" status the SAP Processing programming logic will use when it meets that condition.

Label	Default 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 status is assigned.
- **Undetermined Default Status:** If a calculation cannot be determined for a student due to missing information, this 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 of a particular test, then this status is assigned. Also, if a student has been evaluated for other tests but has no fail statuses for those tests, this status is assigned as the **Calc SAP Status**.
- **Exception Fail Default Status:** If a student has had any career, term, or aid year test exceptions defined and the test FAILS using these exceptions, then this status is assigned. The process checks for student-specific exceptions first (maintained on the **Student SAP** page, **Exceptions** tab).
  - 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 rules are not evaluated.
  - It is recommended that the SAP Code associated with this default be the **highest severity** of the "**Not Meet**" status codes.

- **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.

## Criteria 1 Page

The **Criteria 1** page (tab) in the **Define SAP Setup** pertains to: Set up **Statuses and Actions** (used for PASS 1) and to store the set up of rules for the Quantitative Tests: **Academic Standing, Max Attempted Units**, and **Max Attempted Terms**.

**SAP Setup**  
Effective Date: 04/30/2019

**Statuses and Actions**  
 Use Statuses and Actions

**Statuses and Actions Rules**

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 Standing Test**  
 Use Academic Standing Test

**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**

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	AASASCI	64.001	999.999	MAXT	+	-
PRFTC	ATBATAA	115.001	999.999	MAXT	+	-

**Maximum Attempted Terms Test**  
 Use Max Attempted Terms Test

## Academic Standing Test Configuration

The Academic Standing Rules allow colleges to pick the Academic Standing values in CS Core 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** values are configured by **Academic Careers, 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 to be assessed blank will assess all Program/Plans within that career.

**Academic Program:** 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** 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 career, academic program, and academic plan are *only* 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
		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 FAIL to meet SAP. This SAP Code must exist on the Setup tab, under Calc Status codes before it can be added here and should have a SAP Status of Not Meeting SAP.

**CS Security** | **Statuses and Actions**

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
EXHS	FLEX
EXHS	MEET
EXHS	SUSP
EXHS	WARN
FLEX	WARN

**Academic Standing Test**  
 Use Academic Standing Test

**Academic Standing Rules**

Academic Program	Academic Plan	Academic Standing
		FSUS

**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.

## Maximum Attempted Units Test Configuration

The Maximum Attempted Units test defines maximum units a student can attempt before their SAP status is affected. 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.

### Maximum Attempted Units Test

Use Max Attempted Units Test

#### 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

This test first 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 process uses either the units-taken value or, if that value is zero, the Financial Aid progress units to gather this sum of units attempted at the institution.

The student must be enrolled in the maximum term past the fully graded date. Audited units are not counted. Second, the transfer units are added to that sum from Student Career Term (Term History) based on the transfer unit options selected on the setup. If no transfer unit options are selected, then the Maximum Attempted Units test only includes units attempted at the institution.

Additionally, if course exclusions are set up and the student is enrolled in any of the defined courses, then those units are subtracted from the attempted unit calculation.

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

- **Towards GPA** (option): 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** (option): counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- **Course Credit** (option): counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- **Test Credit** (option): counts test credit units that have been matriculated for the term prior to or including the term being processed.
- **Other Credit** (option): counts other credit units that have been matriculated for the term prior to or including the term being processed.
- **TC Units Adjust** (option): subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

You can use the following Course Exclusion options to subtract Remedial and/or English as a Second Language (ESL) courses from attempted units:

Subtract all remedial course units set up in Course Exclusions that the student is enrolled in unless the value of the total remedial units that the student is enrolled in exceeds the value in the Max Remedial Units to Exclude field. For example, if the student is enrolled in 8 remedial units, and the Max Remedial Units to Exclude value is 3, the SAP process count 5 of the 8 remedial units in the attempted unit calculation.

Subtract all ESL course units set up in Course Exclusions that the student is enrolled in unless the value of the total ESL units that the student is enrolled in exceeds the value in the Max ESL Units to Exclude field.

The setup should cover the entire range of units by career, by career and program, or by career, program, and 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.

## Maximum Attempted Terms Test Configuration

### 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 shows the SAP Setup interface for configuring qualitative tests. The interface includes several sections for setting up rules:

- Minimum Current GPA Test:** Includes a checkbox for "Use Min Current GPA Test" and a field for "Use Special GPA Code". Below it is a table for "Minimum Current GPA Rules" 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.
- Minimum Cumulative GPA Test:** Includes a checkbox for "Use Min Cumulative GPA Test".
- Current Earned Units Test:** Includes a checkbox for "Use Current Earned Units Test" and a dropdown for "Current Earned Units Option". Below it is a table for "Current Earned Units Rules" with columns for Academic Program, Academic Plan, Cur Attempted Units From, Cur Attempted Units To, Cur Earned Units From, Cur Earned Units To, and SAP Status.
- Cumulative Earned Units Test:** Includes a checkbox for "Use Cumulative Earned Units Test" and a dropdown for "Cumulative Earned Units Options". Below it are checkboxes for "Cumulative Attempted Transfer Unit Criteria" and "Cumulative Earned Transfer Unit Criteria".
- Cumulative Earned Units Rules:** A table with columns for Academic Program, Academic Plan, Cum Attempted Units From, Cum Attempted Units To, Cumulative Earned Units % From, Cumulative Earned Units % To, and SAP Status.
- Two Year GPA Test:** Includes a checkbox for "Use Two Year GPA Test" and a field for "Use Special GPA Code". Below it is a table for "Two Year GPA Rules" with columns for Academic Program, Academic Plan, Terms From, Terms To, Cum GPA From, Cum GPA To, and SAP Status.

# Exclusions

Set up remedial and ESL course exclusions. Set up Financial Aid Award Exclusions. Set up Grade Exclusions.

The screenshot shows the SAP Setup interface for Exclusions. The top navigation bar includes 'Setup', 'Criteria1', 'Criteria2', 'Exclusions', and 'Communications and Checklists'. The main header identifies the institution as 'WA130 Lower Columbia College' and the academic career as 'UGRD Academic Career'. The 'SAP Setup' section is active, showing an effective date of 04/30/2019. It contains three main sections: 'Course Exclusions' with a checked 'Use Course Exclusions' box and a 'Max Units to Exclude' sub-section where 'Max Remedial Units to Exclude' is set to 45.00; 'Award Exclusions' with a checked 'Use Award Exclusions' box and various filter fields; and 'Grade Exclusions' with an unchecked 'Use Grade Exclusions' box. Below this is another 'SAP Setup' section for 'Events' and 'Communication Comments'.

# Communications and Checklists

Set up codes and message text for communicating results of tests.

**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

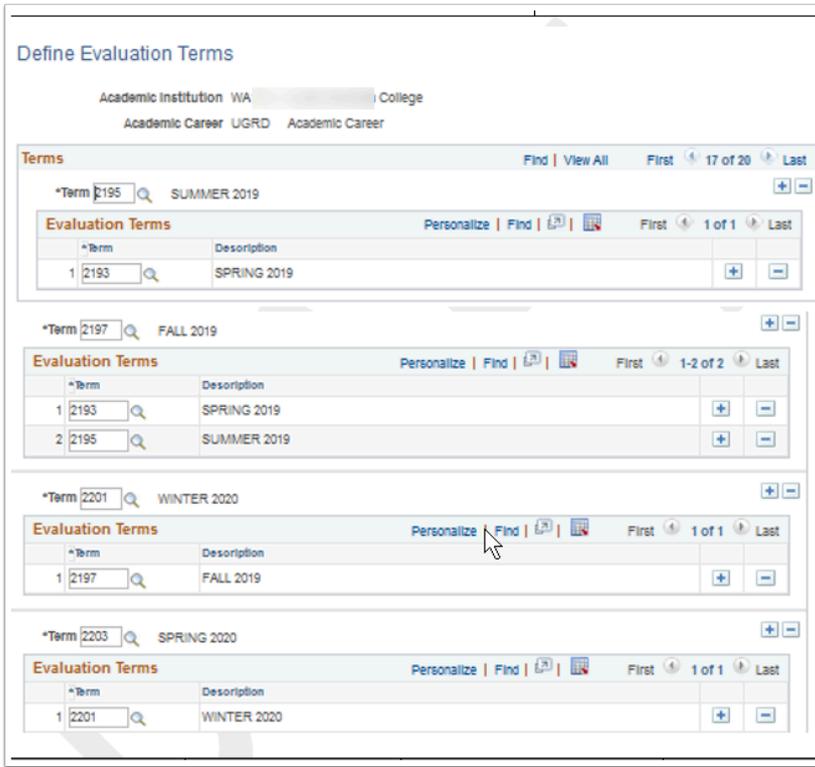
**Component:** SFA\_SAP\_SETUP

**Page:** Setup Criteria 1 - 2, Exclusions

**Action:** UD/DA/C

# Define Evaluation Terms

Configured for evaluation term processing.



**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

Allow Access   
  Award Detail   
  Canceled Awards   
  Award Notification  
 Remaining Need   
  Declined Awards   
  SAP

\*View Data By:    
 \*Need Methodology:   
 \*Summary Link:

### Alternate Text

\*Summary Link Label:   
 \*Academic Year Award Period:   
 \*Non-Standard Award Period:   
 View Award Notification:   
 SAP Link Label:

### Sort Order

\*Term:   
 \*Award:

Inquiry | Awarding | Loan | SAP | Disbursement

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

### Self Service Award Processing

**Access Criteria**  
 FA Application Status    Operator:     Value:   
 Processing Status          
 FED Verification Process          
 INST Verification Process          
 Satisfactory Academic Progress    Operator:     Value:   
 Award Notification Complete    Operator:    

**Processing Option**  
 Batch  
 Real time

Consumer Information URL:   
 Entrance Interview URL:

Category:     Context:     Letter:

### External Award Reporting

Access from Award Inquiry    Alternate Text for Reporting:   
 Access from Accept/Decline    Alternate Text for List View:   
 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://icc.etc.edu/info/webresources/Financial%20Aid%20Forms/Satisfactory-Academic-Progress.pdf>

### SAP Status Message

Personalize | Find | View All | 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 Satis Acad Prgrs	Not Meeting Satis Acad Prgrs	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 Satis Acad Progress	Meeting Satis Acad 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

## Define User Defaults

Row level security user defaults.

Each user will need to define the Institution, Set ID, Aid Year, Business Unit, Campus, Institution Set, and Carry ID, as well as their speed keys.

The screenshot shows a web form titled 'Define User Defaults'. At the top, there are five tabs: 'User Defaults 1', 'User Defaults 2', 'User Defaults 3', 'User Defaults 4', and 'Enrollment Override Defaults'. The 'User Defaults 1' tab is active. Below the tabs, there are two input fields: 'User ID' and 'Name'. The main form contains several rows of fields, each with a label and a search-enabled input box. The fields are: 'Academic Institution' (value: WA), 'Career Group SetID' (value: WA), 'Facility Group SetID' (value: WA), 'Academic Career' (value: UGRD), 'Academic Group', 'Subject Area', 'Term', 'Academic Program', 'Academic Plan', and 'Academic Sub-Plan'. To the right of these fields, there is a vertical list of suggestions: 'College', 'College', 'College', and 'Academic Career'. The 'Academic Career' suggestion is highlighted.

User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults

User ID [ ] Name [ ]

SetID WA College

Aid Year 2020 2019-2020 Financial Aid Year

Business Unit WA College

Application Center [ ]

Recruiting Center [ ]

Cashier's Office [ ]

Department [ ]

Admit Type [ ]

Campus [ ]

Institution Set [ ]

User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys

User ID [ ] Name [ ]

**Administrative Function** Find | View All First 3 of 3 Last

\*Academic Institution WA College

\*Administrative Function FINA Default Comm Key  No Default

**Communication Key** Find | View All First 1-4 of 4 Last

Communication Key FAAWARD

Description Award Notification

Short Desc AwdNotif

Category FACTGY FA Aid Year Comm Category

Context FACNXT Financial Aid Comm Context

Duration

Method E Email Direction OUT Letter Code J80

Comment [ ]

Default Comm Key

Print Comment

Activity Completed

Unsuccessful Outcome

Communication Key FAINITAL

Description Initial Financial Aid Request

Short Desc FA Int Req

Category FACTGY FA Aid Year Comm Category

Context FACNXT Financial Aid Comm Context

Duration

Method E Email Direction OUT Letter Code J83

Comment [ ]

Default Comm Key

Print Comment

Activity Completed

Unsuccessful Outcome

Communication Key FALNDISB

Default Comm Key

Print Comment

**Navigation:** Set Up SACR > User Defaults

**Security:**

- ZC SACR Config
- ZD Local Security Admin
- ZZ Local Security Admin
- ZZ SACR User Defaults
- ZZ Setup SACR User Pref - WA

**Menu:** SPECIFY\_OPERATOR\_DEFAULTS

**Component:** OPR\_DEFAULT\_CS

**Page:** OPR\_DEF\_TABLE\_CA1

**Action:** *needs content*

## Equation Editor

An equation is a defined series of statements that can calculate amounts or check criteria. Packaging equations are established to determine award eligibility as well as award amounts.

The screenshot displays the Equation Editor interface. At the top, the Equation Name is 'CTCFAPFAWISP'. Below this, there are fields for 'Equation Table' with options for 'Find | View All', 'First', '1 of 1', and 'Last'. There are also fields for '\*Eff Date' (01/01/1901), 'Active' checkbox, 'Enable Preview Results' checkbox, 'Short Desc' (PinSelFWs), and '\*Descr' (Plan Select Fa Wi Sp). The 'Compile Status' is 'Successfully Parsed'. Below this is the 'Equation Edit Function' dropdown. The main section is 'Equation Detail', which contains a table with columns: 'Sel', 'Line', 'Keyword', 'Operand Type', 'Operand', and 'Comment'. The table has 18 rows, each representing a step in the equation logic. A mouse cursor is pointing at the 'Operand' field for line 12.

Sel	Line	Keyword	Operand Type	Operand	Comment
	1	Skip			
	2	Assign	Global Variable	A_SELECT	
	3		String	F	
	4	End Assign			
	5	Assign	Local Variable	SQL_RC	
	6		Number	0.0000000000	
	7	End Assign			
	8	Assign	Local Variable	SQL_COUNT	
	9		Number	0.0000000000	
	10	End Assign			
	11	Assign	Local Variable	FIRST_ROW	
	12		Number	1.0000000000	
	13	End Assign			
	14	Assign	Local Variable	LOCAL_INSTITUTION	
	15		Global Variable	INSTITUTION	
	16	End Assign			
	17	Assign	Local Variable	LOCAL_AID_YEAR	
	18		Global Variable	AID_YEAR	

**Navigation:** Set Up SACR > Common Definitions > Equation Engine > Equation Editor

**Security:** ZC SACR Config

**Menu:** DESIGN\_FINANCIAL\_AID1

**Component:** EQUATION\_EDITOR

**Page:** Equation Editor

**Action:** A/UD/DA/C

## Equation Processing Options

Equation used for determining SNG eligibility. This equation is a global configuration used by all institutions.

**Equation Processing Options**

Academic Institution: WA [redacted] College

Aid Year: 2020 2019-2020 Financial Aid Year

**Mapping Details** Find | View All First 1 of 1 Last

Application Prompt ID: Fin Aid SNG Evaluation

Equation Name: CTCFASNGELIG Determine SNG Eligibility

**Navigation:** Set Up SACR > Product Related > Financial Aid > CTC Custom > CTC Interfaces > State Need Grant > Equation Processing Options

**Security:** ZC FA Local Configuration and ZC SACR Financial Aid Config

**Menu:** CTC\_FA\_SNG\_ELG\_E008

**Component:** CTC\_EQ\_PRCES\_CMP

**Page:** CTC\_EQ\_PRCES\_PG

**Action:** A/UD/DA/C

## WA College Grant

Custom page allows institutions to enter the maximum aid year amount and median family income levels (MFI) to be used by processing and reporting functionality for the specified aid year. Configuration values are provided by WSAC.

Awards Amounts Table | MFI Setup Table

Academic Institution WA [ ] College

Aid Year 2020 COPY

Award Amounts		Personalize   Find   [ ] [ ]		First	1-5 of 5	Last
	MFI Percent	NonBas Award Amount	Bas Award Amount			
1	50	3694	6213		+	-
2	55	2586	4349		+	-
3	60	2401	4038		+	-
4	65	2216	3728		+	-
5	70	1847	3107		+	-

Awards Amounts Table | MFI Setup Table

Academic Institution WA [ ] College

Aid Year 2020 COPY

MFI Setup		Personalize   Find   View All   [ ] [ ]		First	1-10 of 100	Last
	Family Size	MFI Percent	Income CutOff			
1	1	50	24000.00		+	-
2	1	55	26000.00		+	-
3	1	60	28500.00		+	-
4	1	65	31000.00		+	-
5	1	70	33500.00		+	-
6	2	50	31000.00		+	-
7	2	55	34500.00		+	-
8	2	60	37500.00		+	-
9	2	65	40500.00		+	-
10	2	70	43500.00		+	-

**Navigation:** SET UP SACR > PRODUCT RELATED > FINANCIAL AID > CTC Custom > CTC Interfaces > SNG Setup

**Security:**

- ZC FA Local Configuration
- ZC SACR Financial Aid Config

- ZD SACR Financial Aid Config

**Menu:** CTC\_FA\_SNG\_ELG\_E008

**Component:** CTC\_SNG\_SETUP\_CMP

**Page:** CTC\_MFI\_PG

**Action:** A/UD/DA/C

## Unit Record Report Config

The Unit Record provides comprehensive information about Washington students who receive need-based financial aid and about the type and amount of assistance they receive. This custom page allows institutions to configure the required values to be used by the reporting process.

**Ethnicity Config** | Awards Config

### Unit Record Report Ethnicity Configuration

Institution WA College

\*Summer Type Header

Personalize | Find | View 100 | First 1-10 of 128 Last

	*Ethnicity Category	*Ethnic Group		
1	IsOfHispanicOrigin	ARGEN	+	-
2	IsRaceNativeHawaiianPacific	HAWAIIA	+	-
3	IsRaceOther	NSPEC	+	-
4	IsRaceWhite	WHITE	+	-
5	IsRaceBlackAfricanAmerican	BLACK	+	-
6	IsRaceAsian	PHILUPI	+	-
7	IsRaceAmericanIndianAlaska	CHEROK	+	-
8	IsOfHispanicOrigin	CENTAMER	+	-
9	IsOfHispanicOrigin	CHICAN	+	-
10	IsOfHispanicOrigin	CHILE	+	-

Ethnicity Config Awards Config

### Unit Record Report Award Configuration

Institution WA College

Personalize | Find | View All | First 1-10 of 60 Last

	*Award Category	*Item Type	*Award Status		
1	FEDERALPELLGRANT	911000000000	Disbursed	+	-
2	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000003100	Disbursed	+	-
3	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000003010	Disbursed	+	-
4	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000003000	Disbursed	+	-
5	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000002410	Disbursed	+	-
6	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000002400	Disbursed	+	-
7	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000002310	Disbursed	+	-
8	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000002300	Disbursed	+	-
9	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000002210	Disbursed	+	-
10	FEDERALDIRECTUNSUBSIDIZEDLOAN	961000002200	Disbursed	+	-

**Navigation:** Set Up SACR > Product Related > Financial Aid > CTC Custom > CTC Interfaces > Unit Record Report > Unit Record Report Config

**Security:**

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

**Menu:** CTC\_URR\_SETUP

**Component:** CTC\_URR\_CFG

**Page:** CTC\_URR\_AWD\_CFG

**Action:** A/UD/DA/C

## College Bound Setup

The College Bound Scholarship fills the gap after other state aid has been awarded to reach the maximum CBS award amounts for the aid year. This custom page allows institutions to specify the maximum CBS award amount for determining CBS awarded amount.

## Maximum CBS Awards By Enrollment Levels

Institution WA: [redacted] College

Aid Year 2020 2019-2020 Financial Aid Year

Copy

Award Amounts		Find   View All   [grid icon]   [calendar icon]	First	1-4 of 4	Last
	Level	Amount			
1	3/4Time	3387	[+]	[-]	
2	Full-Time	4516	[+]	[-]	
3	Half-Time	2258	[+]	[-]	
4	Qter-Time	1129	[+]	[-]	

**Navigation:** Set Up SACR > Product Related > Financial Aid > CTC Custom > CTC Interfaces > College Bound Scholarship > College Bound Setup

### Security:

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

**Menu:** CTC\_URR\_SETUP

**Component:** CTC\_URR\_CFG

**Page:** CTC\_URR\_AWD\_CFG

**Action:** A/UD/DA/C

## Define Rules for State Return

Custom page used to associate grant protection percentages for state item types and cutoff periods when determining state returns.

State Funds | Return Calendar

Academic Institution: WA [redacted] College      Aid Year: 2020

Personalize | Find | View All | [?] | [grid]      First [left] 1-4 of 4 [right] Last

*Item Type	Description	*Pct. Grant Protection		
1 912000000000	Wa State Need Grant	50	+	-
2 912000000200	College Bound Scholarship	50	+	-
3 920000000010	Passport for Foster Youth	50	+	-
4 920000000020	Passport Incentive	50	+	-

State Funds | Return Calendar

Academic Institution: WA [redacted] College      Aid Year: 2020

**Term Setup**      Find | View All      First [left] 1 of 1 [right] Last

\*Career: UGRD [magnifying glass]      + -

*Term	Description	*Start Date	*End Date	*Cutoff Pct Date		
1 2195	SUMMER 2019	07/08/2019 [31]	08/29/2019 [31]	08/02/2019 [31]	+	-
2 2197	FALL 2019	09/23/2019 [31]	12/12/2019 [31]	11/02/2019 [31]	+	-
3 2201	WINTER 2020	01/06/2020 [31]	03/19/2020 [31]	02/11/2020 [31]	+	-
4 2203	SPRING 2020	04/06/2020 [31]	06/18/2020 [31]	05/12/2020 [31]	+	-

**Navigation:** Set Up SACR > Product Related > Financial Aid > CTC Custom > Define Rules for State Return

**Security:**

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

**Menu:** CTC\_E002\_STATE\_REFUND  
**Component:** CTC\_STATE\_RP\_SETUP  
**Page:** CTC\_STATE\_RP\_ITEM  
**Action:** A/UD/DA/C

# State Work Study Report

Work study reporting configuration.

State Work Study | Item Earning Code Crosswalk

### State Work Study Configuration

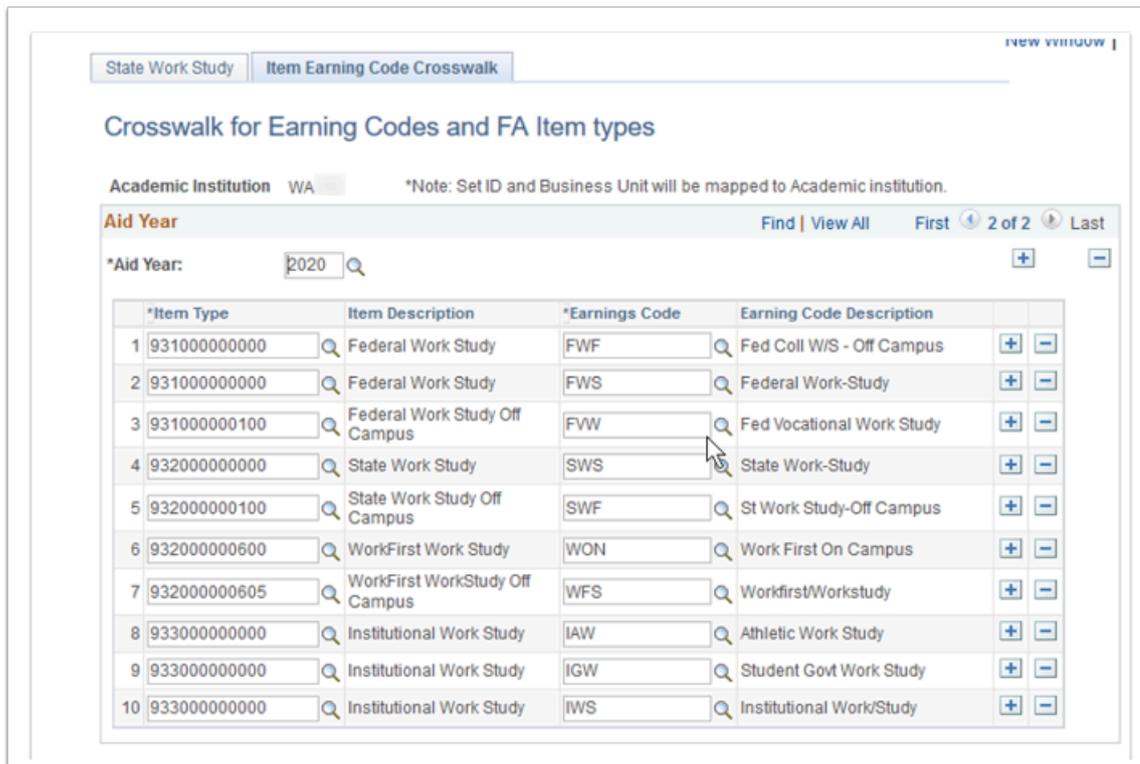
Academic Institution: WA \*Note: Set ID and Business Unit will be mapped to Academic institution.

**Aid Year** Find | View All First 2 of 2 Last  
\*Aid Year: 2020

**Academic Term** Find | View All First 1 of 4 Last  
\*Academic Term: 2195  
Budget Year: 2020

**Pay Period Dates** Personalize | Find | View All | First 1 of 5 Last  
Report Dates CS FSCM HCM  
\*Pay Period  
1 7a

**Job Codes** Personalize | Find | View All | First 1 of 1 Last  
\*Job Code  
1



**Navigation:** Set Up SACR > Product Related > Financial Aid > CTC Custom > State Work Study Report

**Security:**

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

**Menu:** CTC\_R\_075\_STATE\_WORK\_STUDY

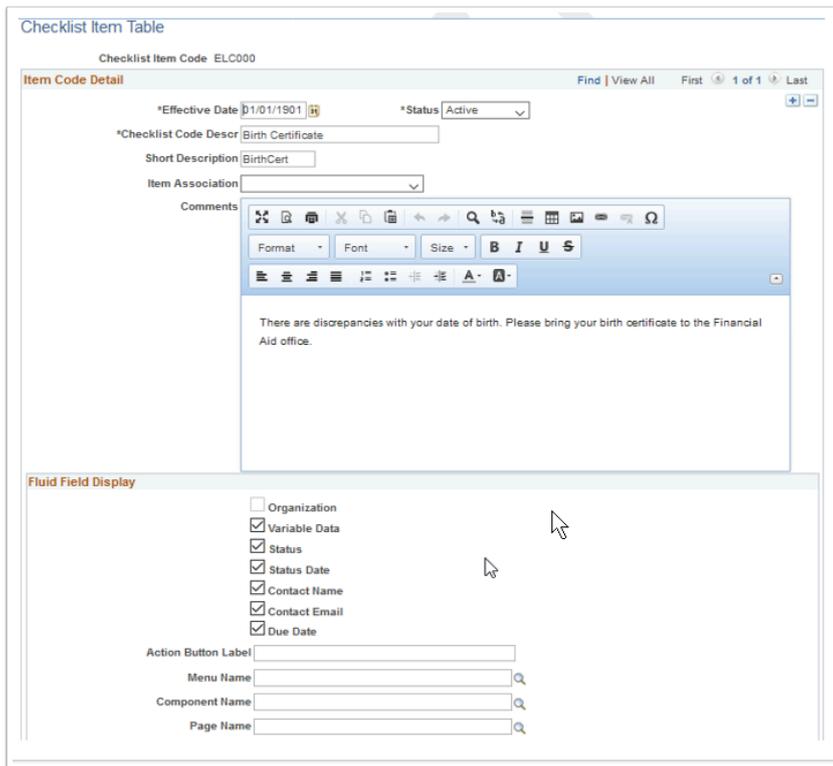
**Component:** CTC\_STATE\_WRK\_STDY

**Page:** CTC\_STATE\_WRK\_STDY

**Action:** A/UD/DA/C

## Checklist Item Table

Initial checklist configuration page, establishing the checklist item code. To review institution specific checklist item configuration, run query: CTC\_FA\_LC\_AYRO\_CHECKLIST\_ITEMS



**Navigation:** Campus Community > Checklists > Set up Checklists > Checklist Item Table

**Security:** ZD FA Local Config Inquiry and ZD SACR Financial Aid Config

**Menu:** MANAGE\_CHECKLISTS

**Component:** CS\_CHK\_ITEM\_TBL

**Page:** SCC\_CHECKLST\_ITEM

**Action:** A/UD/DA/C

## Checklist Items Functions Table

Establishing the administrative function associated with developed checklists. Before checklist items can be assigned to students, they must first be assigned to an administrative function table. To review your institutions checklist item function table assignment, run query:

CTC\_FA\_LC\_AYRO\_CHECKLIST\_ITEMS

Checklist Item Functions Table

Administrative Function FINA Financial Aid

Item List		
*Item Code	Description	
ELC000	Birth Certificate	-
ELC001	Checking/Saving/Assest Info	-
ELC003	Master Promissory Note	-
ELC004	Contact Financial Aid Office	-
ELC005	GED	-
ELC006	HS Diploma/HS Transcript	-
ELC007	Institutional Form	-
ELC008	Defaulted Loan	-
ELC009	Emancipated Minor Documents	-
ELC010	Fafsa Rejected	-
ELC011	In Repayment Status	-
ELC012	Loan Entrance Counseling	-
ELC013	Low Income	-
ELC014	Marriage Certificate	-
ELC015	Orphan/Ward Of Court/Fostrcare	-
ELC016	Proof Of Homeless Youth	-
ELC017	Proof Of Household Size	-

**Navigation:** Campus Community > Checklists > Set up Checklists > Checklist Item Functions Table

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_CHECKLISTS

**Component:** CHK\_FUNCTION\_TABLE

**Page:** CHK\_FUNCTION\_TABLE

**Action:** A/UD/DA/C

## Checklist Table

The checklist table is the parent table for checklist items. To review your institution specific Checklist setup, run query: CTC\_FA\_LC\_AYRO\_CHECKLIST\_TABLE.

**Checklist Table**

Academic Institution WA College

Checklist Code ELC000

**Detail** Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901 \*Status Active

\*Description Birth Certificate  Display in Self Service

Short Description Bcert Due Days 30

\*Function FINA Financial Aid Due Date

Checklist Type Requirements List Tracking Group

**Item List** Personalize | Find | First 1 of 1 Last

*Sequence	*Item Code	Description	Default Due Date	Due Days	Hide	Communication Key
100	ELC000	BirthCert		30	<input type="checkbox"/>	

**Display Checklist Items** Personalize | Find | First 1 of 1 Last

\*Item Status

**Navigation:** Campus Community > Checklists > Set up Checklists > Checklist Table

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_CHECKLISTS

**Component:** CS\_CHKLIST\_TBL

**Page:** CS\_CHKLIST\_TABLE

**Action:** A/UD/DA/C

## Checklist 3C Groups

Checklist security is established via 3C groups. To review your institutions specific checklist 3C Group security, please run query: CTC\_FA\_AYRO\_CHKLIST\_3CGROUP .

## Checklist 3C Groups

Academic Institution WA [redacted] College

Checklist Code ELC000 Birth Certificate

Admin Function Financial Aid

Checklist Type Requirements List

### Update/Inquiry Group

*Group	Description	
FASU	FA Super User	-
FAVO	FA View Only	-
FAVU	FA View Update	-

Add

**Navigation:** Campus Community > Checklists > Set up Checklists > Checklist 3C Groups

### Security:

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_CHECKLISTS

**Component:** CS\_CHKLIST\_TBL

**Page:** CS\_CHKLIST\_TABLE

**Action:** A/UD/DA/C

## Event Definitions

Mass assignment of checklists, communications and comments (3Cs) are handled through event definitions. To review your institution specific Event Definition configurations, please run query: CTC\_FA\_LC\_AYRO\_3CEVENT\_DEFINED

**Event Definition**

Academic Institution

Event ID FISELC0001

**Event Detail** Find | View All First 1 of 1 Last

\*Effective Date  \*Status

\*Description

\*Short Description   User Selection

\*Function  Financial Aid Variable Data Joint Rules

**Communications**

Communication Key  Detail

**Comments**

\*Comment Category  Detail

**Checklists**

\*Checklist Code  Birth Certificate  Update Status

**Checklist Item Details**

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	<input type="text" value="ELC000"/>	<input type="text" value="BirthCer"/>	<input type="text" value="201344784"/>	<input type="text" value="Initiated"/>	<input type="text"/>	<input type="text" value="30"/>	<input type="text"/>

**Navigation:** Campus Community > 3C Engine > Set Up 3C Engine > Event Definition

**Security:**

- ZC CC 3Cs Config
- ZC FA Local Configuration
- ZC SACR Financial Aid Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** DEFINE\_CAMPUS\_COMMUNITY

**Component:** EVNT\_3CS\_SETUP

**Page:** EVNT\_3CS\_SETUP

**Action:** A/UD/DA/C

## Event 3C Groups

Establishes security for event definitions. To review your institution specific Event Definition 3C Group configurations, please run query: CTC\_FA\_LC\_AYRO\_3C\_EVENT\_GROUPS

## Event 3C Groups

Academic Institution WA [redacted] College

Event ID FISELC000I I-Birth Certificate

Function Financial Aid

Update/Inquiry Group			
*Group	Description		
FASU	FA Super User	+	-
FAVO	FA View Only	+	-
FAVU	FA View Update	+	-

**Navigation:** Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups

### Security:

- ZC CC 3Cs Config
- ZC FA Local Configuration
- ZC SACR Financial Aid Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** DEFINE\_CAMPUS\_COMMUNITY

**Component:** EVNT\_GRP\_3C\_TBL

**Page:** EVNT\_GRP\_3C\_TABLE

**Action:** A/UD/DA/C

## Standard Letter Table

Letter code setup to include function and data sources. To review your institution specific configured letter codes, run query: CTC\_FA\_LC\_AYRO\_LETTER\_CODES.

**Standard Letters**

Letter Code LCO  
 \*Description Award Notification Short Description AwdNotif  
 Set Letter Code Inquiry Response Letters

**Processing Letter Details**

\*Function Financial Aid  
 Applicable to  Persons  Organization  
 \*Letter Type Softcopy  
 \*Letter Printed Data All SGC Name

Joint Communications Allowed  
 Include Enclosures  
 Define Comm Gen Parameters

**Template Selection** Find | View All First 1 of 1 Last

Report Name CTCFA\_SF\_LC0 Award Notification View Report Definition

Data Source ID CTC\_FA\_DATASOURCE\_AWARD

Template ID	Description	Language	Method	Default Template
CTCFA_SF_LC0_1	AWDNOTIFICATION_Email SFCC	English	E-Mail	<input checked="" type="checkbox"/>
CTCFA_SF_LC0_2	AWDNOTIFICATION_Printer SFCC	English	Letter	<input type="checkbox"/>

**Navigation:** Campus Community > Communications > Set up Communications > Standard Letter Table CS

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_COMMUNICATIONS

**Component:** SA\_STNDR\_LTR\_TABLE

**Page:** SCC\_STN\_LTR\_TBL

**Action:** A/UD/DA/C

## Communication Context Table

Establish sending methods and direction for letter codes.

To review your institution specific communication context and communication category, run query: CTC\_FA\_GC\_AYRO\_COMM\_CNTXT\_CAT

Communication Context

Academic Institution WA College

Communication Context FACNXT

Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901 \*Status Active

\*Description Financial Aid Comm Context

Short Desc FA Cnbt

**Communication Context Method**

*Method	*Direction	Letter Code	Description
Email	Outgoing Communication	J80	Award Notification
Email	Outgoing Communication	J81	Financial Aid Susp. Status
Email	Outgoing Communication	J82	Financial Aid Warning Status
Email	Outgoing Communication	J83	Initial Financial Aid Request
Email	Outgoing Communication	J84	Upd. Chklist-New Item on To Do
Email	Outgoing Communication	J85	Loan Funds Available for Disb
Email	Outgoing Communication	J87	Possible Repayment
Email	Outgoing Communication	J88	Entering Default Notification
Email	Outgoing Communication	J89	Delinquent Loan Notification
Email	Outgoing Communication	J8A	Entering Loan Repayment Ltr
Letter	Outgoing Communication	J80	Award Notification
Letter	Outgoing Communication	J81	Financial Aid Susp. Status
Letter	Outgoing Communication	J82	Financial Aid Warning Status
Letter	Outgoing Communication	J83	Initial Financial Aid Request
Letter	Outgoing Communication	J84	Upd. Chklist-New Item on To Do
Letter	Outgoing Communication	J85	Loan Funds Available for Disb
Letter	Outgoing Communication	J87	Possible Repayment
Letter	Outgoing Communication	J88	Entering Default Notification
Letter	Outgoing Communication	J89	Delinquent Loan Notification
Letter	Outgoing Communication	J8A	Entering Loan Repayment Ltr

Communication Context

Academic Institution WA College

Communication Context FAGEN

Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901 \*Status Active

\*Description Financial Aid GEN Admin Func

Short Desc FinAid GEN

**Communication Context Method**

*Method	*Direction	Letter Code	Description
Email	Outgoing Communication	J86	Exit Loan Communication
Letter	Outgoing Communication	J86	Exit Loan Communication

Add

**Navigation:** Campus Community > Communications > Set up Communications > Communication Context Table

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_COMMUNICATIONS

**Component:** COMM\_CTXT\_TBL

**Page:** COMM\_CTXT\_TABLE

**Action:** A/UD/DA/C

# Communication Category Table

Communication categories are assigned to communication 3C groups on the Communications 3C Groups page for the purpose of limiting access to the communications associated with those categories.

To review your institution specific Communication Categories, run query: CTC\_FA\_GC\_AYRO\_COMM\_CATEGORY.

**Communication Categories**

Academic Institution WA  College

Communication Category FACTGY

**Communication Category Description** Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901  \*Status Active

\*Description FA Aid Year Comm Category

Short Description FA Com Ctg

\*Function FINA  Financial Aid

**Communication Context**

*Context	Description
FACNXT <input type="text"/>	Financial Aid Comm Context <input type="text"/>

**Communication Categories**

Academic Institution WA  College

Communication Category FAGEN

**Communication Category Description** Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901  \*Status Active

\*Description Financial Aid GEN Admin Func

Short Description FinAid GEN

\*Function GEN  General

**Communication Context**

*Context	Description
FAGEN <input type="text"/>	Financial Aid GEN Admin Func <input type="text"/>

**Navigation:** Campus Community > Communications > Set up Communications > Communication Category Table

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_COMMUNICATIONS

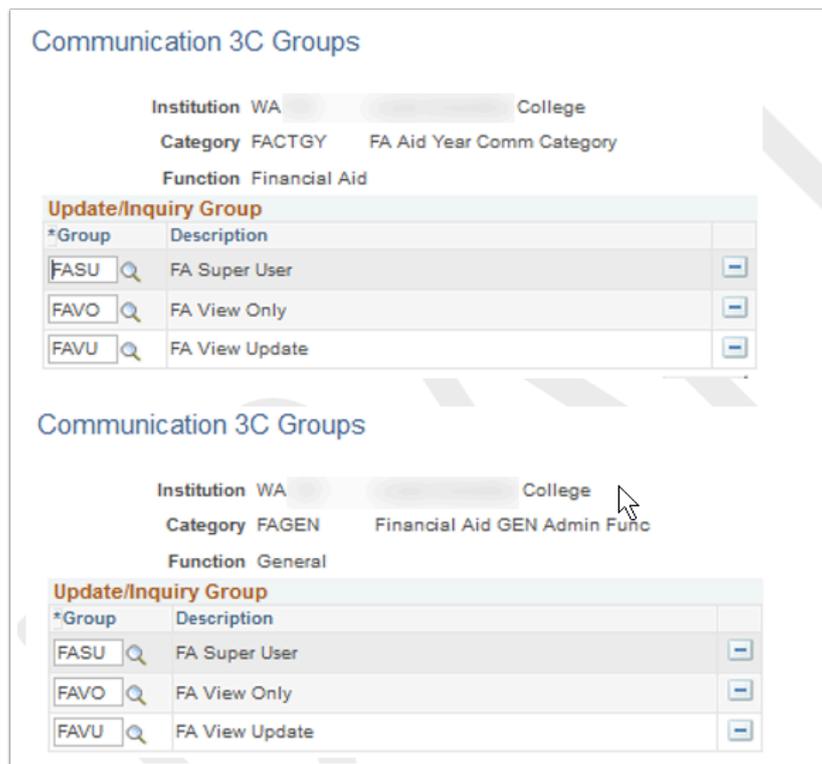
**Component:** COMM\_CATG\_TBL

**Page:** COMM\_CATG\_TABLE

**Action:** A/UD/DA/C

## Communication 3C Groups

Establishing communication security by category. To review your institution specific Communication Categories, run query: CTC\_FA\_GC\_AYRO\_COMM\_CATGRY\_GRP



**Navigation:** Campus Community > Communications > Set up Communications > Communication 3C Groups

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_COMMUNICATIONS

**Component:** COMM\_GRP\_3C\_TBL

**Page:** COMM\_GRP\_3C\_TABLE

**Action:** A/UD/DA/C

## Communication Speed Key Table

Establishing list of communications available for assigning via Speed Keys.

Communication Speed Keys

Institution WA College  
Function FINA Financial Aid

**Comm Key Detail** Find View 1 First 1-4 of 4 Last

Communication Key   Print Comment

\*Description   Activity Completed

Short Desc   Unsuccessful Outcome

\*Category  FA Aid Year Comm Category

\*Context  Financial Aid Comm Context

Duration

\*Method  Email Direction  Letter Code

Comments

---

Communication Key   Print Comment

\*Description   Activity Completed

Short Desc   Unsuccessful Outcome

\*Category  FA Aid Year Comm Category

\*Context  Financial Aid Comm Context

Duration

\*Method  Email Direction  Letter Code

Comments

Communication Speed Keys

Institution WA College  
Function FINT Financial Aid Term

**Comm Key Detail** Find View All First 1 of 6 Last

Communication Key   Print Comment

\*Description   Activity Completed

Short Desc   Unsuccessful Outcome

\*Category  FA Term Comm Category

\*Context  Financial Aid Comm Context

Duration

\*Method  Email Direction  Letter Code

Comments

**Navigation:** Campus Community > Communications > Set up Communications  
> Communication Speed Key Table

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** MANAGE\_COMMUNICATIONS

**Component:** COMM\_SPEED\_KY\_INST

**Page:** COMM\_SPDKEY\_TABLE

**Action:** A/UD/DA/C

## Report Definition

Defines a report and associates it with a communication data source from which to extract data and the templates to be merged with the extracted data.

The screenshot shows a web-based configuration interface for a report. At the top, there are tabs for 'Definition', 'Template', 'Output', 'Properties', 'Security', and 'Bursting'. The 'Definition' tab is active. The 'Report Name' is 'CTCFA\_LC\_J80'. Below this is a 'Data Source' section with fields for 'Data Source Type' (XMLDoc Object), 'Data Source ID' (CTC\_FA\_DATASOURCE\_AWARD), and 'Data Source Description' (FA Datasource for Awards). A 'Change Data Source' link is visible. The 'Report Properties' section includes 'Report Description' (Award Notification), '\*Report Status' (Active), '\*Report Category ID' (FA), 'Owner ID' (Financial Aid), and '\*Template Type' (RT). There is also a 'Retention Days' field. At the bottom, there are buttons for 'Add', 'Update/Display', 'Include History', and 'Correct History'. Metadata shows the report was registered on 06/06/2016 and updated on 10/13/2016 by CIBER\_FUNCTIONAL. Navigation links for 'Return to Search', 'Previous In List', and 'Next In List' are at the bottom.

Definition | **Template** | Output | Properties | Security | Bursting

Report Name: CTCFA\_LC\_J80

**Template** Find | View All First 1 of 2 Last

Template ID: CTCFA\_LC\_J80\_1  Default Template

Description: AWDNOTIFICATION\_Email LCC

\*Language Code: English Channel: Email

**Template Files** Find | View All First 1 of 1 Last

Effective Date: 01/01/1901

\*Status: Active  Use Data Transform

Template File: CTC\_FA\_LCC\_J80\_AWDNOTIFICATION\_EML.rtf

Upload Preview  Use Alt. XML

Definition | **Template** | Output | Properties | Security | Bursting

Report Name: CTCFA\_PE\_JK0

**General**

**Runtime Output Format Options**

Format Type	Enabled	Default
HTML	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RTF	<input checked="" type="checkbox"/>	<input type="checkbox"/>
XLS	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Output Location**

\*Location: Any

File Name:

Add Update/Display Include History Correct History

Return to Search Previous in List Next in List

Definition | **Template** | Output | Properties | Security | Bursting

Report Name: CTCFA\_LC\_J80

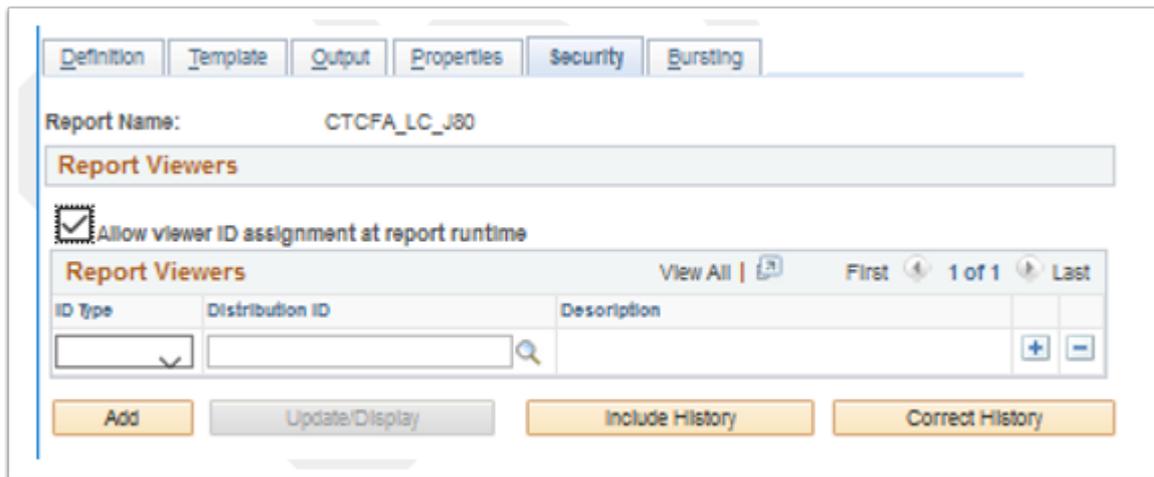
**Report Properties**

Property Group: PDF Output

**Property Settings**

Property	Prompt	Default
pdf-compression	<input type="text"/>	True
pdf-hide-menubar	<input type="text"/>	False
pdf-hide-toolbar	<input type="text"/>	False
pdf-replace-smartquotes	<input type="text"/>	True

Add Update/Display Include History Correct History



**Navigation:** Reporting Tools > BI Publisher > Report Definition

**Security:**

- ZZ CC 3Cs Config
- ZZ CC 3Cs User
- ZZ\_DS\_BI\_PUB\_DEV
- ZZ\_DS\_QUERY\_ADMIN

**Menu:** XMLPUBLISHER

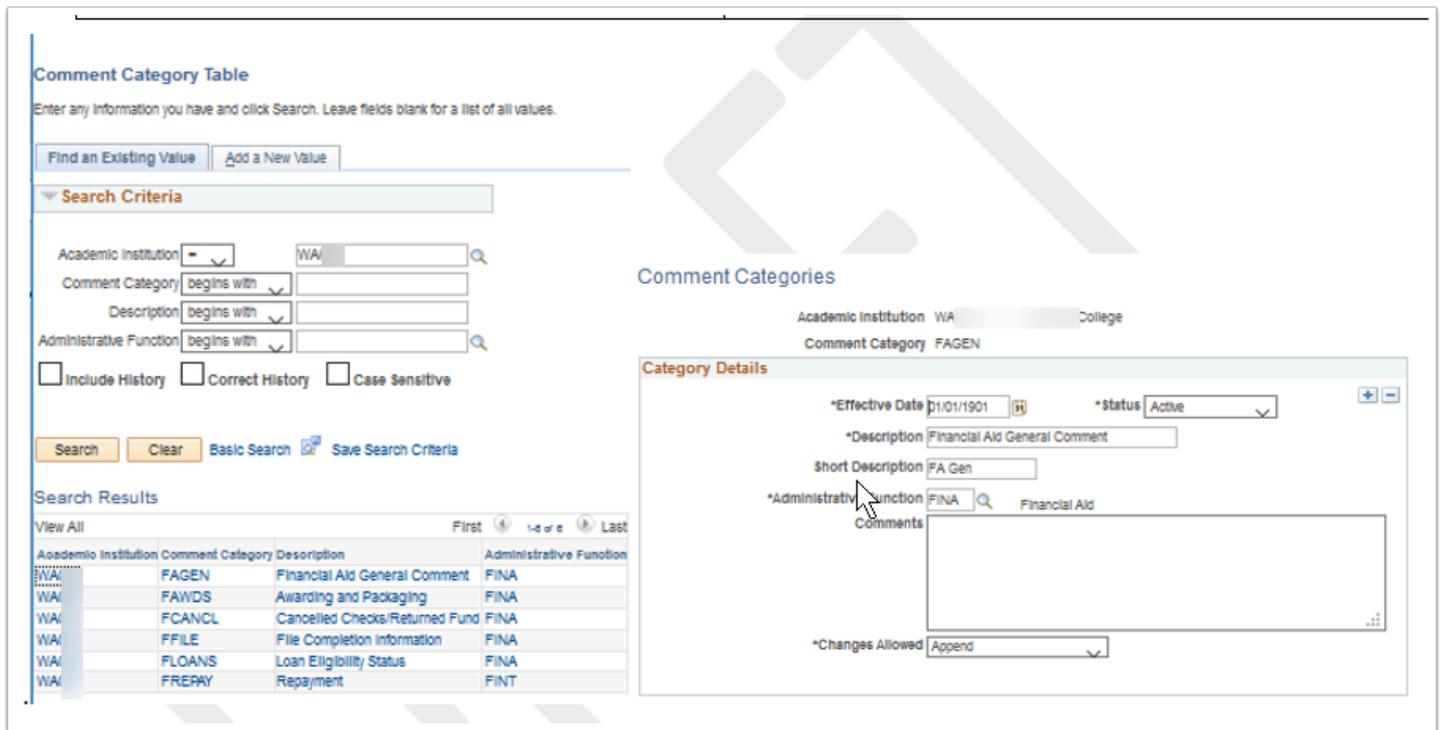
**Component:** PSXPRPTDEFN

**Page:** PSXPRPTDEFN

**Action:** A/UD/DA/C

## Comment Categories

Define categories that enable you to group comments for similar purposes. Delivering global and requested values. To review a list of you institution specific comment categories, run query: CTC\_FA\_GC\_AYRO\_COMMENT\_CATEGORY.



**Navigation:** Campus Community > Comments > Set Up Comments > Comment Category Table

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** CREATE\_COMMENTS

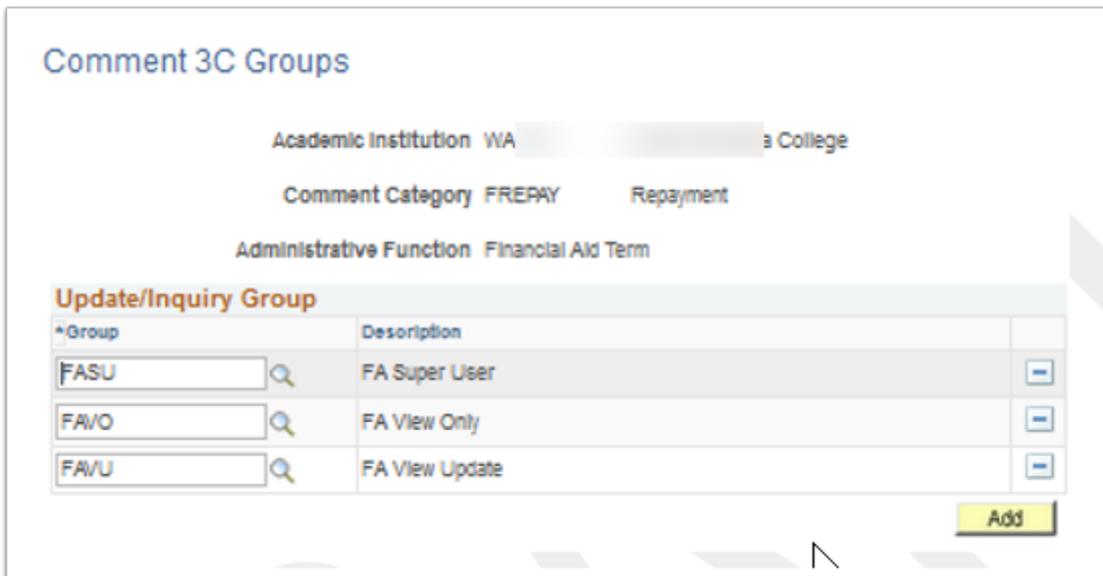
**Component:** CMNT\_CATG\_TBL

**Page:** CMNT\_CATG\_TABLE

**Action:** A/UD/DA/C

## Comment 3C Groups

Establishing security for comments. To review your institution specific configured comment 3C groups, run query: CTC\_FA\_GC\_AYRO\_COMMENT\_CATGGRP.



**Navigation:** Campus Community > Comments > Set Up Comments > Comment 3C Groups

**Security:**

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

**Menu:** CREATE\_COMMENTS

**Component:** CMNT\_GRP\_3C\_TBL

**Page:** CMNT\_GRP\_3C\_TABLE

**Action:** A/UD/DA/C

## File List Table

File paths used for importing and exporting financial aid files. Delivering global and requested values.

**File List Table**

Institution: WA [redacted] College

Functional Area: Financial Aid

**File List** Find  First 1-23 of 23 Last

\*Business Process:  + -

Description:

Max Size Allowed:  MB (Only for Upload)

**File Path**

Upload:

Download:

---

\*Business Process:  + -

Description:

Max Size Allowed:  MB (Only for Upload)

**File Path**

Upload:

Download:

**Navigation:** PeopleTools > CTC Custom > Extensions > File List Table

**Security:**

- ZC FA Local Configuration
- ZC SACR Financial Aid Config
- ZZ\_FA\_UPLOAD\_DOWNLOAD

**Menu:** CTC\_E207\_FL\_UPLD\_DOWNLD

**Component:** CTC\_E207\_FL\_CONFIG

**Page:** CTC\_FL\_UPLD\_DL\_CFG

**Action:** A/UD/DA/C