


9.2 Financial Aid - User Defaults

Purpose: Use this document as a reference for how to set up User Defaults in ctcLink.

Audience: Financial Aid Staff.

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

- ZD Local Security Admin
- ZZ Local SACR Security Admin
- ZZ SACR User Defaults

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

Setting Up User Defaults

Navigation: NavBar > Navigator > Set Up SACR > User Defaults

1. The User Defaults page display.
2. Select the **User Defaults 1** tab to set defaults for academic information.
 - a. Choose the **Academic Institution** by entering the desired **Academic Institution Code** or by using the lookup tool next to the field.
 - b. Note: **Career Group SetID** and **Facility Group SetID** will populate automatically.
3. Select the **Save** button to save your work.

[User Defaults 1](#) | [User Defaults 2](#) | [User Defaults 3](#) | [User Defaults 4](#) | [Enrollment Override Defaults](#)

User ID CTC_KCLARK **Name**

Academic Institution Spokane CC
 Career Group SetID Spokane Community College
 Facility Group SetID Spokane Community College
 Academic Career
 Academic Group
 Subject Area
 Term
 Academic Program
 Academic Plan
 Academic Sub-Plan

Save Notify

[User Defaults 1](#) | [User Defaults 2](#) | [User Defaults 3](#) | [User Defaults 4](#) | [Enrollment Override Defaults](#) | [Communication Spee](#)

4. Select the **User Defaults 2** tab to set defaults for financial and admission data.
5. The User Defaults 2 tab displays.
 - a. Enter the **Set ID**.
 - b. Enter the **Aid Year**.
 - c. Enter the **Business Unit**.
 - d. Enter the **Institution Set** value.
6. Select the **Save** button to save your work.

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

User ID CTC_KCLARK Name

SetID WA171 Spokane Community College

Aid Year 2017 2016-2017 Financial Aid Year

Business Unit WA171 Spokane Community College

Application Center

Recruiting Center

Cashier's Office

Department

Admit Type

Campus

Institution Set WA171 Spokane Community College

Save Notify

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

7. No defaults will be set for the **User Defaults 3** tab.
8. Select the **User Defaults 4** tab to set defaults for printing transcripts, award notifications and SEVIS.
9. The User Defaults 4 tab displays.
10. Select the **Carry ID** box.
11. Select the **Save** button to save your work.

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

User ID CTC_KCLARK

☒ Carry ID

Output Destination Page

Transcript Type

Flexible Transcript Type

Advisement Report Type

SEVIS Default

School Code

Program Number

Printer Name Explain

Save Notify

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

12. No defaults will be set for the **Enrollment Override Defaults** tab.

13. Select the **Communication Speed Keys** tab to add **Communication Speed Keys**. If this tab is not visible, select the arrow at the top right of the tabs. Select the arrow at the top left to return.
14. The Communication Speed Keys tab displays.
 - a. Enter the **Institution Code** in the **Academic Institution** field.
 - b. Enter **FINA** in the **Administrative Function** field.
 - c. Enter **Communication Keys** by clicking the **(+)** to insert a new row. Note: Add a new row for each **Communication Key**.
 - d. Select the lookup tool to choose the desired **Communication Key** code.

User ID: CTC_KCLARK Name: _____

Administrative Function Find | View All First 1 of 2 Last

*Academic Institution: WA220 Tacoma CC

*Administrative Function: FINA Default Comm Key ☐ No Default

Communication Key Find | View All First 1 of 2 Last

Communication Key: FAWARD

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: L80

Comment: _____

User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys | User 3C Groups Summary | UCAS, UTT Defaults

15. The Communication Speed Key options display.

List of delivered Communication Speed Key Options

WA171	GEN	FEXIT_E	Exit Loan Notification Email	Exit Ln E
WA172	GEN	FEXIT_E	Exit Loan Notification Email	Exit Ln E
WA220	GEN	FEXIT_E	Exit Loan Notification Email	Exit Ln E

16. Select the **Save** button to save your work.
17. No defaults will be set for the **User 3C Groups Summary** tab.
18. No defaults will be set for the **UCAS, UTT Defaults** tab.
19. Process complete.