

## 9.2 Student Services Center (Financial Aid)

**Purpose:** Use this document as a reference on how to read the information in the Financial Aid tab of the Student Center in ctcLink.

**Audience:** Financial Aid staff, college staff.


The Institution/Aid Year section is the top of the page on the Financial Aid tab in Student Center, where a user can view the Institution in which a student has aid, and drills down to information such as their financial aid application status, dependency information, SAP, packaging status, and other related data in the aid year. Note that the most current aid year displays on the top of the available list of aid years to view.

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

- ZC CC Personal Info Student
- ZD CC Personal Info Student
- ZD CC Super user
- ZZ CC Pers Info NID Update
- ZZ CC Personal Info Student
- ZZ SS Advisor
- ZZ SS Faculty

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

## Student Services Center (Financial Aid)

 Please note, many of the access on this tab may be limited to varying security roles. Work with your supervisor and local security admin to review individual roles if access to specific areas on this tab should be viewable in your specific role.

## Institution/Aid Year Section

**Navigation: NavBar > Navigator > Campus Community > Student Services Ctr (Student)**

1. The Student Services Center page displays.
2. At the **Financial Aid** tab, note the **Institution** and **Aid Year** options. In the example below, there are two aid years available to view. The aid year that has a link is the aid year that has the information displaying to the right of the page.

WA220 - Tacoma CC

- 2022 - 2021-2022 Financial Aid Year
- 2021 - 2020-2021 Financial Aid Year

2021-2022 Financial Aid Year

Dependency Status: Independent w/Primary EFC

EFC Status: Official

Date Application Received: 10/24/2020

Correction Status

Correction Status Date: n/a

Aid Application Status: Application Active for All Aid

Package Status: Applied

Packaging Plan ID

Review Status: Incomplete

INST Verification Status: Non Select

Verification Flag: Not Required

Verification Status: Not Selected

Fan Ltr Status

SAP: SAP Undetermined

Fed Year COA: 0.00

Prorated EFC: 0

Currency used is US Dollar

3. Review the information on the page. This example screenshot below is taken in early February of the 20-21 aid year. Viewing the 21-22 aid year information may be too early to glean any information about the aid package or processing status.
4. Note the student's **EFC Status**. It is determined that the student in this example has applied for a FAFSA, which was imported into ctcLink as indicated by the **EFC Status** of **Official**. If the EFC status was 'unofficial', that would be indicative of the FAFSA/ISIR not yet being loaded into ctcLink.
5. In the **Dependency Status**, it is determined that the student in the example below is an Independent student (24 years or older, and/or married, and/or supporting children, and/or a Veteran, and/or has petitioned to apply without parent data).

Occasionally a student's FAFSA dependency status is subject to the determination of the Financial Aid Office, specifically in cases where a student has filed a FAFSA and opted to omit parent data, or apply without parent data. If the student is McKinney

Vento Homeless Youth, or otherwise At Risk for Homelessness, the Dependency Status may reflect as Independent, but official determination on that status is typically made by the Financial Aid Office. So note the Dependency status may change.

6. The **Package Status** is **Applied**, which indicates the student has applied for aid.
7. The **Review Status** is 'Incomplete', which means the student may have some financial aid materials to submit to the Financial Aid office to move the file on for Financial Aid staff review. The student may view any outstanding items to be completed in their **To Do** list.
8. Note the **Verification Status** -- this student has not been selected for federal Verification in the 21-22 aid year. If the student was selected for verification, the **Verification Status** would display "Required to be Performed".
9. Note the **SAP Status** is 'Undetermined' which means SAP has not yet been calculated for the aid year term.
10. Finally, review the **Prorated EFC** status. In this example, the value is 0. Which means the student is fully eligible for financial aid, insofar as term COA and aid awarded within need-based and non-need based aid.

The screenshot displays the 'Financial Aid' section of a student's profile. A navigation bar at the top includes links for Student Center, General Info, Admissions, Transfer Credit, Academics, Finances, and Financial Aid. Below this, a section titled 'Institution / Aid Year' shows 'WA220 - Tacoma CC' and '2021 - 2020-2021 Financial Aid Year'. A 'View Packaging Status Summary' button is visible. The main content area lists various financial aid statuses with numbered callouts:

- 5. Dependency Status: Independent w/Primary EFC
- 4. EFC Status: Official
- Date Application Received: 10/24/2020
- Correction Status: n/a
- Aid Application Status: Application Active for All Aid
- 6. Package Status: Applied
- 7. Review Status: Incomplete
- 8. Verification Status: Not Selected
- 9. SAP: SAP Undetermined
- 10. Prorated EFC: 0

Additional fields include: INST Verification Status: Non Select, Verification Flag: Not Required, Fan Ltr Status, Fed Year COA: 0.00, and Currency used is US Dollar.

11. Next, select the **2021 - 2020-2021 Financial Aid Year** link, to review the current (or previous year's aid year).

ID

Student Center
General Info
Admissions
Transfer Credit
Academics
Finances
Financial Aid

Institution / Aid Year

View Packaging Status Summary

WA220 - Tacoma CC

2022 - 2021-2022 Financial Aid Year

2021 - 2020-2021 Financial Aid Year

2021-2022 Financial Aid Year	
Dependency Status	Independent w/Primary EFC
EFC Status	Official
Date Application Received	10/24/2020
Correction Status	
Correction Status Date	n/a
Aid Application Status	Application Active for All Aid
Package Status	Applied
Packaging Plan ID	
Review Status	Incomplete
INST Verification Status	Non Select
Verification Flag	Not Required
Verification Status	Not Selected
Fan Ltr Status	
SAP	SAP Undetermined
Fed Year COA	0.00
Prorated EFC	0
Currency used is US Dollar	

12. In review of the current/previous aid year, note the same information but with different values are listed. The **Dependency Status** still indicates the student is **Independent**.
13. The **EFC Status** is **Official**, and the date application received is displayed.
14. Note the **Packaging Status** displays as **Completed**. This status means the student has been awarded Financial Aid.
15. The **Packaging Plan ID** in this example is FA-WI-SP, which means aid has been offered for Fall, Winter, and Spring terms.
16. Note the **Review Status**, which is **Complete**. This means all Financial Aid documents have been reviewed, and the file is moved on for packaging.
17. Note the **Fed Year COA**, which is the **Federal Aid Year Cost of Attendance**. The number in this example is 19,605, which is the **Cost of Attendance** for Fall, Winter, and Spring terms. The value in this row can vary depending on how many terms for which the student has been packaged/awarded aid.
18. Also note the **Prorated EFC**, which is 0 for the aid year.

ID

[Student Center](#)
[General Info](#)
[Admissions](#)
[Transfer Credit](#)
[Academics](#)
[Finances](#)
[Financial Aid](#)

Institution / Aid Year
View Packaging Status Summary

WA220 - Tacoma CC
2022 - 2021-2022 Financial Aid Year
2021 - 2020-2021 Financial Aid Year

2020-2021 Financial Aid Year

Dependency Status: Independent w/Primary EFC  
EFC Status: Official  
Date Application Received: 03/31/2020  
Correction Status:  
Correction Status Date: n/a  
Aid Application Status: Application Active for All Aid  
Package Status: Packaging Completed  
Packaging Plan ID: FA-WI-SP Fall/Winter/Spring  
Review Status: Review Complete  
INST Verification Status: Non Select  
Verification Flag: Not Required  
Verification Status: Not Selected  
Fan Ltr Status: Initial  
SAP: Meeting Satis Acad Progress  
Fed Year COA: 19,605.00  
Prorated EFC: 0  
Currency used is US Dollar

## Award Summary for Aid Year Section

Scrolling down a little further on the page is the **Award Summary for Aid Year 20xx** Section. This section displays the aid offered in the aid year, and also drills down to the award amount by term.

19. At the **Award Summary for Aid Year** section, note the **Aid Year** in which you are reviewing (highlighted). The example below displays the 2021 (20-21) aid year awards.
20. Note the **Assign Awards to a Student** button. This button is for Financial Aid Staff (or designees with the required security access) only. This button takes a Financial Aid staff member (or designee) to the awarding page where awards may be made on the award package.
21. Next, awards can be viewed. In this example, the student has Pell grant, Federal Supplemental Education Opportunity Grant, and Washington College Grant awards.
22. Note there are columns for **Offered/Accepted**, and **Authorized/Disbursed**. The amounts that display here in the Offered/Accepted typically reflect the annual amount of the award. The amounts in **Authorized/Disbursed** typically reflect the amount that has been authorized and disbursed up to the point in the term. In this example, the aid is being reviewed during Winter '21 term, which means Spring '21 term still has yet to be authorized/dispursed.

23. Note the link for **Student Award Inquiry**. This link further drills down into how the awards are awarded by term. Select the **Student Award Inquiry** link to view how the aid is distributed annually and per term.

Award Summary For Aid Year 2021		19	20	Assign Awards to a Student		
Item Type	Description	Career	Offered	Accepted	Authorized	Disbursed
911000000000	Federal Pell Grant	UGRD	6,345.00	6,345.00	4,230.00	4,230.00
911000000100	Supplemental Educ Opp Grant	UGRD	450.00	450.00	300.00	300.00
912000000000	Washington College Grant	UGRD	4,219.00	4,219.00	2,812.00	2,812.00
912000000100	Wa College Grant-Waitlist	UGRD	0.00	0.00	0.00	0.00
930000000000	Work Study Offer	UGRD	0.00	0.00	0.00	0.00
961000001110	Subsidized Direct Ln 1-New Fee	UGRD	0.00	0.00	0.00	0.00
961000002110	Unsubsidized Direct Ln 1-New F	UGRD	0.00	0.00	0.00	0.00
TOTAL			11,014.00	11,014.00	7,342.00	7,342.00
Student Award Inquiry		Currency used is US Dollar				

24. The Award Summary Inquiry page displays.
25. Note how the page displays two tabs -- one for **Award Summary** (Annual amount) and one for **Award Term Summary** (Term amount).
26. In review of the Award Summary tab, select the **Award Detail** link on an award to view the 'per term' award distribution.

Award Summary

Award Term Summary

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ID

Aid Year

2021

2020-2021 Financial Aid Year

Institution

WA220

Award Summary

Item Type	Description	Career	Offered	Accepted	Authorized	Disbursed	
911000000000	Federal Pell Grant	UGRD	6,345.00	6,345.00	4,230.00	4,230.00	<div>26</div> <a href="#">Award Detail</a>
911000000100	Supplemental Educ Opp Grant	UGRD	450.00	450.00	300.00	300.00	<a href="#">Award Detail</a>
912000000000	Washington College Grant	UGRD	4,219.00	4,219.00	2,812.00	2,812.00	<a href="#">Award Detail</a>
912000000100	Wa College Grant-Waitlist	UGRD	0.00	0.00	0.00	0.00	<a href="#">Award Detail</a>
930000000000	Work Study Offer	UGRD	0.00	0.00	0.00	0.00	<a href="#">Award Detail</a>
961000001110	Subsidized Direct Ln 1-New Fee	UGRD	0.00	0.00	0.00	0.00	<a href="#">Award Detail</a>
961000002110	Unsubsidized Direct Ln 1-New F	UGRD	0.00	0.00	0.00	0.00	<a href="#">Award Detail</a>
TOTAL			11,014.00	11,014.00	7,342.00	7,342.00	

Cancel

27. The Award Disbursement Detail pagelet displays.
28. Note the aid is divided up into term award amounts. In the example below, the Federal Pell grant has been distributed for Fall, Winter, and Spring Term.
29. Select the **Return** link.

#### Award Disbursement Detail

Item Type

911000000000

Federal Pell Grant

Award Status

Accepted

Disbursement Plan

10

Fall-Winter-Spring-Summer

Split Code

XX

Disbursement ID	Term	Offered	Accepted	Net Disb Balance	Authorized	Disbursed
01	2207	2,115.00	2,115.00	2,115.00	2,115.00	2,115.00
02	2211	2,115.00	2,115.00	2,115.00	2,115.00	2,115.00
03	2213	2,115.00	2,115.00	2,115.00	0.00	0.00
04	2215	0.00	0.00	0.00	0.00	0.00

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Return

30. The Award Summary Inquiry page displays.
31. Select the **Award Term Summary** tab to review award information by term.
32. Use the **View All** link to display all the terms on one page.
33. Select the **Cancel** button to return to the Financial Aid tab.

Award Summary
Award Term Summary

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

Term Summary
1 of 4
View All

Term 2207 2020 FALL
Offered 3,671.00
Accepted 3,671.00

Item Type	Description	Career	Disbursement ID	Offered	Accepted	Authorized	Disbursed
1 911000000000	Federal Pell Grant	UGRD	01	2,115.00	2,115.00	2,115.00	2,115.00
2 911000000100	Supplemental Educ Opp Grant	UGRD	01	150.00	150.00	150.00	150.00
3 912000000000	Washington College Grant	UGRD	01	1,406.00	1,406.00	1,406.00	1,406.00
4 912000000100	Wa College Grant-Waitlist	UGRD	01	0.00	0.00	0.00	0.00
5 930000000000	Work Study Offer	UGRD	01	0.00	0.00	0.00	0.00
6 961000001110	Subsidized Direct Ln 1-New Fee	UGRD	01	0.00	0.00	0.00	0.00
7 961000002110	Unsubsidized Direct Ln 1-New F	UGRD	01	0.00	0.00	0.00	0.00

Cancel

## Term Summary for Aid Year Section

The last section on this Financial Aid tab in Student Services Center (Financial Aid) is the Term Summary for Aid Year. It is in this section you can view FA Load (term enrollment value), term budget information, and COA and remaining Need.

34. At the **Term Summary for Aid Year** section, note the aid year in which you are reviewing. In the example below, the review is for the 2021 (20-21) aid year.
35. Note the **Maintain Student FA Term** button. This button is for Financial Aid Staff (or designees with the required security access) only. This button takes a Financial Aid staff member (or designee) to the Maintain Student FA Term page where Term information may be viewed.
36. Note the Term breakdown, and the **FA Load** -- the FA Load describes the student's enrollment level at the time of Census and/or real-time enrollment.
37. Also note the **Student Budget** link. This link leads to the **Maintain Student Budget** page. Select the link to view budget information and other links to Need Summary, etc.



Term Summary For Aid Year 2021

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Maintain Student FA Term

Term	Description	Term Source	Academic Level	FA Load	NSLDS Loan Year
2207	FALL 2020	Term (records)	Freshman	Enrolled Full-Time	1st Year - Never Attended
2211	WINTER 2021	Term (records)	Freshman	Enrolled Full-Time	1st Year - Previously Attended
2213	SPRING 2021	Program(records)	Freshman	Enrolled Full-Time	1st Year - Previously Attended

Student Budget

[Go to top](#)

38. The Student Budget Maintenance page displays.
39. Note the **Term** in which you are reviewing (highlighted).
40. Use the arrows to toggle back and forth between terms.
41. Note the **Pell Term COA**, which displays the entire COA for the term. The Pell Term COA is to be used, not the Institutional Term COA.
42. Select the link for **Need Summary**. It is in this link you can view annual:
  - COA,
  - amount of aid,
  - and remaining **Unmet Need**.

**Student Budget Maintenance**

Aid Year 2021    2020-2021 Financial Aid Year

ID [redacted]    Institution WA220

Update Need Summary

**Student Budget Summary**

1 of 3

39

Career UGRD Undergraduate

42

[Need Summary](#)

40

[FA Term](#)

Term 2213 SPRING 2021

Award Period Academic

Weeks of Instruction 12.0

**Budget Group**

Effective Date 12/15/2020  
 Effective Sequence 1  
 User ID FAPBUDMV  
 Budget Group SYSTEM System Mass Budget

41

Institutional Term COA	6,535.00
Federal Term COA	6,535.00
Pell Term COA	9,803.00
Less than Half Time Pell COA	9,803.00

**Budget Item**

Category	Item Code	Full Time	User ID	Amount	Item Class	Pell Amt	Pell Less Half Annual Amount		
BOOK	BOOK	Full Time	FAPBUDMV	310.00	Federal	465.00	465.00	+	-
HSNG	HSNG01	Hsng3MoOff	FAPBUDMV	3,500.00	Federal	5,250.00	5,250.00	+	-
MISC	MISC01	Misc3MoOff	FAPBUDMV	744.00	Federal	1,116.00	1,116.00	+	-
TRAN	TRAN01	Tran3MoOff	FAPBUDMV	414.00	Federal	621.00	621.00	+	-
TUIT	TUIT	Tuit3Mo	FAPBUDMV	1,567.00	Federal	2,351.00	2,351.00	+	-

OK Cancel Apply

43. The Need Summary pagelet displays.

44. It displays the:
  - a. *Standard Term(s)* **COA**
  - b. **EFC**
  - c. **Need**
  - d. **Total Aid (Fed)**
  - e. **Unmet Need (Fed)**
  - f. **Unmet COA (Fed)**
45. ctclink uses the **Federal Calculation**, not the **Institutional Calculation**.
46. In the example below, the student still has unmet need for the aid year.

Federal and Institutional Summary

Q

1 of 2

View All

Award Period

Academic

EFC Status

Official

Federal

COA

19,805.00

EFC

0

Need

19,805.00

Mo. 9

Montgomery GI Bill/Amercorps

0

Total Aid (Fed)

11,014.00

Unmet Need (Fed)

8,591.00

Unmet COA(Fed)

8,591.00

Institutional

COA

19,805.00

EFC

0

Need

19,805.00

Mo. 0.0

Montgomery GI Bill/Amercorps

0

Total Aid (Inst)

0.00

Unmet Need (Inst)

19,605.00

Unmet COA(Inst)

19,605.00

Federal Calc Information

Federal Rule Set

CSS Rules

Institutional Calc Information

Institutional Rule Set

Institutional EFC Used