

9.2 Processing Federal Verification (Financial Aid)

Purpose: Use this document as a reference on how to process verification for students whose FAFSAs are selected for the federal verification process in ctcLink.

Audience: Financial Aid Staff

! Processing verification is currently a manual process. Within this process, two key steps are involved:

Step 1) Update the **Verification Checklist** item from "Initiated" to "Complete".

Step 2) Update the **View Packaging Status Summary** page on three items:

- **Verification Flag**
- **Verification Status**
- **Review Status**

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

- ZD FA Director
- ZD FA Student Aid Info
- ZZ FA Student Aid Info

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

Processing Federal Verification (Financial Aid)

Completing the Verification Checklist

Navigation: NavBar > Navigator > Financial Aid > View Financial Aid Status Summary Page

1. The Financial Aid Status search page displays.

2. Enter the **Empl ID** of the student selected for the federal verification process.
3. Enter the **Academic Institution** - in this example, Tacoma Community College is used.
4. Enter the **Aid Year** - in this example, the 2021 Aid Year is used.
5. Select **Search**.

[Find an Existing Value](#)

▼ **Search Criteria**

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

☐ Case Sensitive

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

6. The Financial Aid Status page displays.
7. Scroll to the Checklist group box, and select the Verification **Item Code** for "Standard 20xx-20xx" -- the Checklist Management page opens.

💡 Note that your college's Checklist **Item Code** will be different than what is displayed in the example.

Financial Aid Status

Jones [REDACTED]

ID 2 [REDACTED]



Aid Year 2020-2021 Financial Aid Year
 Institution WA220
 National ID [REDACTED]
 Campus ID [REDACTED]
 Birthdate [REDACTED]
 Dependency Independent w/Primary EFC
 EFC Status Official
 Date Application Received 01/15/2020
 CPS Process Date 01/16/2020
 Institution Process Date 02/18/2020
 Correction Status
 Correction Status Date

Packaging Status Summary

| | |
|--------------------------|--------------------------------|
| Aid Application Status | Application Active for All Aid |
| Package Status | Applied |
| SAP | SAP Undetermined |
| Review Status | Incomplete |
| INST Verification Status | Non Select |
| Verification Flag | Required to be Performed |
| Verification Status | Not Selected |
| Disbursement Hold | |

Checklists

| <div> <div>1-3 of 3</div> <div>View All</div> </div> | | | | |
|--|-----------|--------------------------------|-------------|-----------|
| | Item Code | Description | Status Date | Status |
| 1 | FTC027 | Stdnt/Spouse Tax Trnsrpt 2018 | 03/12/2020 | Initiated |
| 2 | FTC029 | Standard 2020-2021 | 03/12/2020 | Initiated |
| 3 | ETC100 | Residency Mismatch ISIR vs Bio | 03/12/2020 | Initiated |

8. The Checklist Management page displays.
9. At the Checklist Management 2 tab, in the Checklist Item Table, change the **Status** in the drop-down list from "Initiated" to "Completed" -- the **Status Date** will automatically update to the date on which you marked the status as complete.
10. Select the **Save** button.

Note that when you mark "Completed" on the Checklist Management 2 tab, the "Completed" status carries over to the status, and auto-completed the item on the Checklist Management 1 tab.

Conversely, if you were to mark the status as "Completed" on only the Checklist Management 1 tab, you would also need to update the status to "Completed" on the Checklist Management 2 tab, because it will not auto-complete like it does if you work from Checklist Management 2 first.

Tip: Ensure you are working from the Checklist Management 2 tab when "Completing" checklist items.

Checklist Management 1

Checklist Management 2

Ashley Jones

ID 201486458

Checklist Date Time

03/12/2020 2:35:02AM

Administrative Function

Financial Aid

Academic Institution

Tacoma CC

Checklist Code

Standard 2020-2021

Status

Initiated

Status Date

03/12/2020

Due Date

04/11/2020

Checklist Item Table

*Sequence

100

*Item

FTC029

StdV21

*Status

Completed

*Status Date

04/20/2020

*Due Date

04/11/2020

Responsible ID

201272057

Name

Tacoma Community College,Financial Aid Services

+

-

Save

Return to Search

Notify

Updating the View Packaging Status Summary

Navigation: NavBar > Navigator > Financial Aid > View Packaging Status Summary Page

! You must complete the Updating the View Packaging Status Summary step, and all checklists must be marked "Completed" to move to the File Complete stage. If the Updating the View Packaging Status Summary page step is not completed, the student will not be selected for the Mass Packaging process.

1. The Packaging Status Summary search page displays.
2. Enter the **Empl ID**.
3. Enter the **Academic Institution** - in this example Tacoma Community College is used.
4. Enter the **Aid Year** - in this example, the 2021 Aid Year is used.
5. Select **Search**.

Packaging Status Summary

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

Find an Existing Value

▼ Search Criteria

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

☐ Case Sensitive

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)

6. The Packaging Status Summary page displays.
7. At the **Verification Flag** row, move the drop-down option from "Required to Be Performed" to "ED Verification Complete".
8. Next, at the **Verification Status** row, move the drop-down option to "Verified".
9. If your file review is now completed, and you have determined this student is ready to be moved into Set Ready to Package status, you can move the **Review Status** from "Incomplete" to "Review Complete", whereupon this student will be selected in the Set Ready to Package, Population Selection process.
10. Select the **Save** button.

Packaging Status Summary

| | | | | | | |
|----------------------|----------|------------------------------|------------------|------------------|--------------|------|
| Jones | | ID | | | | |
| Aid Year | 2020 | 2019-2020 Financial Aid Year | Institution | WA220 | | |
| EFC Status | Official | TERM | ISIR Information | Database Matches | Need Summary | PELL |
| Calculation Override | | | | | | |

| | | |
|--------------------------|--------------------------------|--|
| Counselor | | |
| Academic Career | UNKN | |
| Aid Processing Status | Applied | |
| Aid Application Status | Application Active for All Aid | |
| Review Status | Review Complete | |
| INST Verification Status | Non Select | |
| Verification Flag | ED Verification Complete | |
| Verification Status | Verified | |

| | | |
|-----------------------|-------------------------|--|
| Scholarship Status | Not Evaluated | |
| *Aid Packaging Method | Not Packaged | |
| Packaging Plan ID | | |
| Repackaging Plan ID | | |
| Aggregate Source | FA Installation Default | |

| | | |
|-----------------------|--|--|
| Aggregate Source Used | | |
| Shopping Sheet Group | | |

Save

Return to Search

Previous In List

Next In List

Notify

*Satisfactory Academic Progress

SAP Undetermined

SAP Details

Disbursement Hold

Loan Counseling Status

Award Notification

Self Service

Awarding Access

Allow Access

☒ Inquiry Access

☒ External Award Access

☐ Limited Pell Grant Indicator

11. End of procedure.