

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

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

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

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

BUDGET_GRP_TBL BUDGET_ITEM	Budget Groups	FA
BDGT_ASSIGN_CATG BDGT_ASSIGN_CNTL BDGT_ASSIGN_TERM	Budget Assignment	FA
RUN_CNTL_BDGT_P RUN_CNTL_FABDGT	Budget Assignment Run Control	FA
FA_ADDR_USAGE	Budget Tree Address Usage	FA
FA_APP_SRC_RANK FA_APP_SRC_TBL FA_APP_SRC_TYP	Application Source Rank	FA
BDGT_REGION_TBL	Budget Region Table	FA
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	Define SAP Set Up Criteria	FA
SFA_SAP_ET_AYRH SFA_SAP_ET_AYR	Define SAP Evaluation Aid Year	FA
SFA_SAP_ET_TRMH SFA_SAP_ET_TRM	Define SAP Evaluation Terms	FA
ERLY_FA_CTG_TBL	Early Fin Aid Categories	FA

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

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

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

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

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

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

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

Aid Year 2020 2019-2020 Financial Aid Year

Copy from Previous Year

Personalize | First 1 of 1 Last

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

School Cd 00 COLLEGE

Academic Career Find | View All First 1 of 1 Last

UGRD Academic Career

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 WINTN
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.

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 College

Aid Year 2020 2019-2020 Financial Aid Year

Personalize Find  				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				<div style="border: 1px dashed black; padding: 2px; display: inline-block;">Copy Group</div>
Aid Year 2020				<input type="checkbox"/> Do Not Copy
Shopping Sheet Group SHOPGRP01				
Group Attributes				
Group Description Shopping Sheet Group 1				
*Academic Career UGRD				
EFC Option Federal				
Award Period Academic				
Self Service Link Label FA College Financing Plan				
<input type="checkbox"/> Allow display with no awards				

Group Options	Institution Information	Budget Mapping	Award Mapping	
Institution WA				<div style="border: 1px solid black; padding: 2px; display: inline-block;">Preview</div>
Aid Year 2020				
Shopping Sheet Group SHOPGRP01				
Heading Information				
Institution Name College				
Institution Initial				
Institution Logo SFA_SCHOOL_LOGO				
Not Applicable Awards				
<input type="checkbox"/> Federal Pell Grant				
<input checked="" type="checkbox"/> Federal Perkins Loan				
<input type="checkbox"/> Work-Study				
<input type="checkbox"/> Federal Subsidized Loan				
Institutional Metrics				
Institution Group 2				
Cohort Year 2017				
<input type="checkbox"/> No Graduation Rate Data				
Graduation Rate 38.5				
Graduation Rate Level Medium				
Collection Year				
<input type="checkbox"/> No Repayment Rate Data				
Institution Repayment Rate 34.4				
National Repayment Rate 46.2				
<input type="checkbox"/> No Median Borrowing Data				
Average Borrowed Amount 11583				
Average Monthly Payment 123				
Address Information				
Institution Name College				
Office Name Financial Aid Services				
Address St				
City, State Zip WA				
Phone Number 90				

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 HERE.

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 | View 5 | 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			+	-

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 shows a web-based configuration interface for INAS FM Assumption Codes. 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" button and a page indicator "1-70 of 70". A table lists assumption codes with their long descriptions. Each row has a code field, a description field, and expand/collapse icons. A mouse cursor is pointing at the description field for code 74.

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

IM Assumptions 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 Find | View All First 1 of 1 Last

*INAS Rule Set CSS Rules/Values

Run Type

INAS Data Source Federal Data INAS Calc Type Federal Methodology

Federal

☐ Calculate Student Federal Tax
☐ Calculated Parent Federal Tax
☐ Calculate PC For Independent

[FM Budget Durations](#)
[EFC Proration Options](#)

Institutional

Use Which EFC Greatest
 Application Source Profile
 State WA

[IM Budget Durations](#)

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.

Title IV Funds Institutional Charges

Academic Institution WA College Aid Year 2020

Auto Populate

Selected Funds/Item Types

*Item Type	50 Pct. Grant Protection	Fed Funds Pct.	*Fund Type
1 911000000000	<input checked="" type="checkbox"/>	100	Pell Grant
2 911000000010	<input checked="" type="checkbox"/>	100	Pell Grant
3 911000000030	<input checked="" type="checkbox"/>	100	Iraq Afghanistan Service Grant
4 911000000100	<input checked="" type="checkbox"/>	100	FSEOG
5 961000001100	<input type="checkbox"/>	100	Subsidized FFELDir
6 961000001110	<input type="checkbox"/>	100	Subsidized FFELDir
7 961000001200	<input type="checkbox"/>	100	Subsidized FFELDir
8 961000001210	<input type="checkbox"/>	100	Subsidized FFELDir
9 961000001300	<input type="checkbox"/>	100	Subsidized FFELDir
10 961000001310	<input type="checkbox"/>	100	Subsidized FFELDir
11 961000001400	<input type="checkbox"/>	100	Subsidized FFELDir
12 961000001410	<input type="checkbox"/>	100	Subsidized FFELDir
13 961000002100	<input type="checkbox"/>	100	Unsubsidized FFELDir

Title IV Funds Institutional Charges

Academic Institution WA College Aid Year 2020

☒ Use Actual Charges

Personalize | Find | First 1-2 of 2 Last

*Item Type Group	*ChargeType
1 FAR2T4H FA R2T4 Housing	Room and Board
2 FAR2T4TF FA R2T4 Tuition & Fees	Tuition

☐ Use Budget Charges

Personalize | Find | First 1 of 1 Last

*Budget Item Category	*ChargeType
1	

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 UGRD 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 categoriesbudget 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/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

=

WA

Aid Year

=

2020

Budget Item Category

begins with

Description

begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

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: TU/T 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
 *Description: Tuition Zero Short Description: Tuit00
 *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
 *Description: FT Resident Tuition Short Description: FTResTuit
 *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
 *Description: FT Border County Tuition Short Description: FTBCTuit
 *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.

The screenshot shows the 'Assign Career' tab. At the top, there are tabs for 'Assign Career' and 'Assign Budget Category'. Below the tabs, the following information is displayed: Academic Institution WA, College, Aid Year 2020, Academic Career UGRD, and Academic Career. A search bar contains 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. The main form area includes:

- *Effective Date: 01/01/1901
- *Status: Active
- *Description: System Batch Budget Assignment
- Comments: System Batch Budget Assignment

 A mouse cursor is pointing at the bottom right of the comments field.

The screenshot shows the 'Assign Budget Category' tab. At the top, there are tabs for 'Assign Career' and 'Assign Budget Category'. Below the tabs, the following information is displayed: Academic Institution WA, College, Aid Year 2020, Academic Career UGRD, and Academic Career. A search bar contains 'Find' and navigation buttons for 'First', '1 of 1', and 'Last'. The main form area includes:

- Effective Date: 01/01/1901
- *Term: 2023, SPRING 2020
- *Bdgt Group: SYSTEM, System Mass Budget
- *Category: BOOK, BooksSupl
- *Error Type: Warning
- *Processing Rule: Formula B
- *Description: Books/Supplies
- Comments: Books/Supplies
- *Category: HSG, Housing
- *Error Type: Warning
- *Processing Rule: Formula B
- *Description: Housing/Food/Utilities
- Comments: Housing/Food/Utilities
- *Category: MISC, MiscPers
- *Error Type: Warning
- *Processing Rule: Formula B
- *Description: Misc/Personal
- Comments: Misc/Personal
- *Category: TRAN, Trans
- *Error Type: Warning
- *Processing Rule: Formula B
- *Description: Transportation
- Comments: Transportation
- *Category: TUIT, TuftFee
- *Error Type: Warning
- *Processing Rule: Formula B
- *Description: Tuition/Fees
- Comments: Tuition/Fees

 A mouse cursor is pointing at the 'Housing' category section.

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

Level Limits [Personalize](#) | [Find](#) | [View All](#) First 1-4 of 6 Last

*Aggr Lvl	Description	Aggregate Limit	Cumulative Limit	Max Terms
U0	Undergraduate Freshman - New	9,293	<input type="text"/>	<input type="text"/>
U1	Undergraduate Freshman - Prev.	9,293	<input type="text"/>	<input type="text"/>
U2	Undergraduate Sophomore	9,293	<input type="text"/>	<input type="text"/>
U3	Undergraduate Junior	9,293	<input type="text"/>	<input type="text"/>

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 Areas for Institution



Institution WA College

Aid Year 2020





















All Aggregate Areas

Clear

Aggregate Areas for Institution

Personalize | Find |  

First 1-5 of 5 Last

*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"/>	+	-
02	Fall-Winter	Fa-Wi	<input type="checkbox"/>	+	-
03	Fall Only	Fall	<input type="checkbox"/>	+	-
04	Fall-Spring	Fa-Sp	<input type="checkbox"/>	+	-
05	Winter-Spring	Wi-Sp	<input type="checkbox"/>	+	-
06	Winter Only	Winter	<input type="checkbox"/>	+	-
07	Spring Only	Spring	<input type="checkbox"/>	+	-
08	Summer Only	Summer	<input type="checkbox"/>	+	-
09	Summer-Fall-Winter-Spring	SuFaWiSp	<input type="checkbox"/>	+	-
10	Summer-Fall-Winter	Su-Fa-Wi	<input type="checkbox"/>	+	-

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 the 'Disbursement ID' configuration window. At the top, there are filters for Institution (WA), Career (UGRD), Academic Career, Aid Year (2020), Disbursement Plan (09), and Summer-Fall-Winter-Spring. A 'Copy' button is on the right. Below the filters, there are three entries for Disbursement IDs. Each entry has a label '*Disbursement ID' followed by a value in a box and '(Aid Year Sequence)'. The first entry has ID 01, Description 'Summer Disbursement 1', Short Description 'Sumr Disb1', Term 2195, SUMMER 2019, Award Period: Academic, Disbursement Date 07/01/2019, and Loan Request Dt 07/01/2019. The second entry has ID 02, Description 'Fall Disbursement 1', Short Description 'Fall Disb1', Term 2197, FALL 2019, Award Period: Academic, Disbursement Date 09/16/2019, and Loan Request Dt 09/16/2019. The third entry has ID 03, Description 'Winter Disbursement 1', Short Description 'Wntr Disb1', Term 2201, WINTER 2020, Award Period: Academic, Disbursement Date 12/31/2019, and Loan Request Dt 12/31/2019. Each entry has a '+' and '-' button to its right.

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

This is a close-up screenshot of the fourth entry in the Disbursement ID configuration window. It shows the following details: *Disbursement ID 04 (Aid Year Sequence), *Description Spring Disbursement 1, Short Description Sprg Disb1, *Term 2203 SPRING 2020, Award Period: Academic, *Disbursement Date 03/31/2020, and Loan Request Dt 03/31/2020. There are '+' and '-' buttons to the right of the ID field.

*Disbursement ID	(Aid Year Sequence)	*Description	Short Description	*Term	Award Period	*Disbursement Date	Loan Request Dt
04		Spring Disbursement 1	Sprg Disb1	2203 SPRING 2020	Academic	03/31/2020	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
Aid Year 2020 2019-2020
Copy

Career UGRD Academic Career
Disbursement Plan 09 Summer-Fall-Winter-Spring

* Split Code	*Description	Short Description		
AY	Fall-Winter-Spring	Fa-Wi-Sp	+	-
F1	Fall	Fall	+	-
F2	Fall-Winter	Fa-Wi	+	-
F5	Fall-Spring	Fa-Sp	+	-
U1	Summer	Summer	+	-
U2	Summer-Fall	Su-Fa	+	-
U3	Summer-Fall-Winter	Su-Fa-Wi	+	-
U4	Sumr-Fall-Winter-Spring	SuFaWiSp	+	-
U5	Summer-Fall-Spring	Su-Fa-Sp	+	-

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

Aid Year 2020 2019-2020 Financial Aid Year

Career UGRD Academic Career

Disbursement Plan 09 Summer-Fall-Winter-Spring

Split Code U4 Sumr-Fall-Winter-Spring

Copy

Even Split Option Even among first disb for Term ▼ 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.

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

SetID WA
Item Type 911000000000Federal Pell Grant
Aid Year 20202019-2020 Financial Aid Year

FA Item Type SetupFind | View AllFirst1 of 1Last

*Effective Date01/01/1901*StatusActiveCopy

*DescriptionFederal Pell GrantShort DescriptionPELL

Financial Aid TypeGrantSourceFederalFederal IDFederal PELL Grant

Aggregate AreaPELL130Institution Reporting CdSAPCAdditional Pell

Comments

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

SetID WA130
Item Type 911000000000Federal Pell Grant
Aid Year 20202019-2020 Financial Aid Year

Awarding RulesFind | View AllFirst1 of 1Last

Effective Date01/01/1901StatusActive

Fed/Inst AffectedFederal Only

Meet Need/CostStraight Need/Cost

Packaging MethodologyFederal Methodology

Selection Criteria

☒ Need Based☒ Auto Package☒ Disbursement Protection

☐ Self Help Award☐ Package Only Once☐ Lock Award

☐ Equity Award☐ Don't Repackage

Rounding Rules

Rounding OptionRound Even Dollar

Round DirectionRound Nearest

Award Remainder RuleLast Disbursement - Dollars

Fee Remainder Rule

☐ 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
<u>Regular Term</u>	<u>1.00</u>	<u>99,999.00</u>

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
<u>WA130</u>	<u>UGRD</u>	<u>09</u>	<u>AY</u>

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	
				Declined	Amount	0.00		
Highest	0.00	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	
Notes		Find View All		First 1 of 1 Last	
User ID		Date/Time			
<div> <div>Comment</div> <div></div> </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.

Packaging Plan

FM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution WA College

Aid Year 2020

Academic Career UGRD Academic Career

Plan ID SUFAWISP

Package Plan

Find

First

1 of 1

Last

*Effective Date 06/15/2016

*Status Active

Copy

Processing Order 10

*Award Period Both Academic & Non Std

*Description Summer/Fall/Winter/Spring

Short Description SUFAWISP

Selection Criteria CTCFAPUFS

Equation Detail

Packaging Plan

FM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution WA College

Aid Year 2020

Academic Career UGRD Academic Career

Plan ID SUFAWISP

Package Rule

Find

First

1 of 1

Last

Effective Date 06/15/2016

Status Active

Processing Order 10

Item Types

Find

View All

First

1 of 11

Last

Sequence Nbr 10

% of Total Package 100.0

Spending Limit Preferences

☐ Gap

☒ Item Type 911000000000

Federal Pell Grant

☐ Related Item Group

Selection Criteria CTCFASBSPELL

Equation Detail

Limited by

Minimum ☒ Constant ☐ Equation 1.00

Maximum ☒ Constant ☐ Equation 9,999,999.00

IM Target Equity Rule Packaging Limits Packaging Rules 1 Packaging Rules 2

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

Find First 1 of 1 Last

Effective Date 06/15/2016 Status: Active Processing Order 10

Item Type Defaults Find View All First 1 of 11 Last

Sequence Nbr 10 Item Type 911000000000 Federal Pell Grant
Award Action Offer/Accept

Disbursement Plan

☐ Use Item Type Default Disbt Plan 09 Summer-Fall-Winter-Spring
☒ Override Default

Split Code

☐ Use Item Type Default Split Code U4 Sumr-Fall-Winter-Spring
☒ Override Default

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.

Find an Existing Value Add a New Value

Search Criteria

Academic Institution WA Academic Career UGRD Repackaging Plan ID LOAN-RFWS Description begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

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-Winter-Spring
WA	2020	UGRD	LOAN-RFWS	Loans - Summer-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 Plan

Repackaging Plan

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

Repackaging Target

*Effective Date 08/16/2018 *Status Active *Processing Order 10 Copy

*Description Loans - Sum-Fall-Winter-Spring Short Description SuFaWiSp

*Award Period Both Academic & Non Std Selection Criteria CTCFAPUFWs Equation Detail

FM Need Target ☐ Constant ☐ Equation ☒ Percent % Need FM 100.0

IM Need Target ☐ Constant ☐ Equation ☒ Percent % Need IM 100.0

Repackaging Rule

Rule Nbr 10 Repackaging Rule Increase

Need Threshold Federal unmet need

Method Item Type

Item Type 981000001110 Sequence Last

Subsidized Direct Ln 1-New Fee

Disbursement Plan 47 Split Code L4

Minimum ☒ Constant ☐ Equation 100.00

Maximum ☐ Constant ☒ Equation CTCFALCASUB3 Equation Detail

Tolerance 100.00

Action Offer/Accept

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

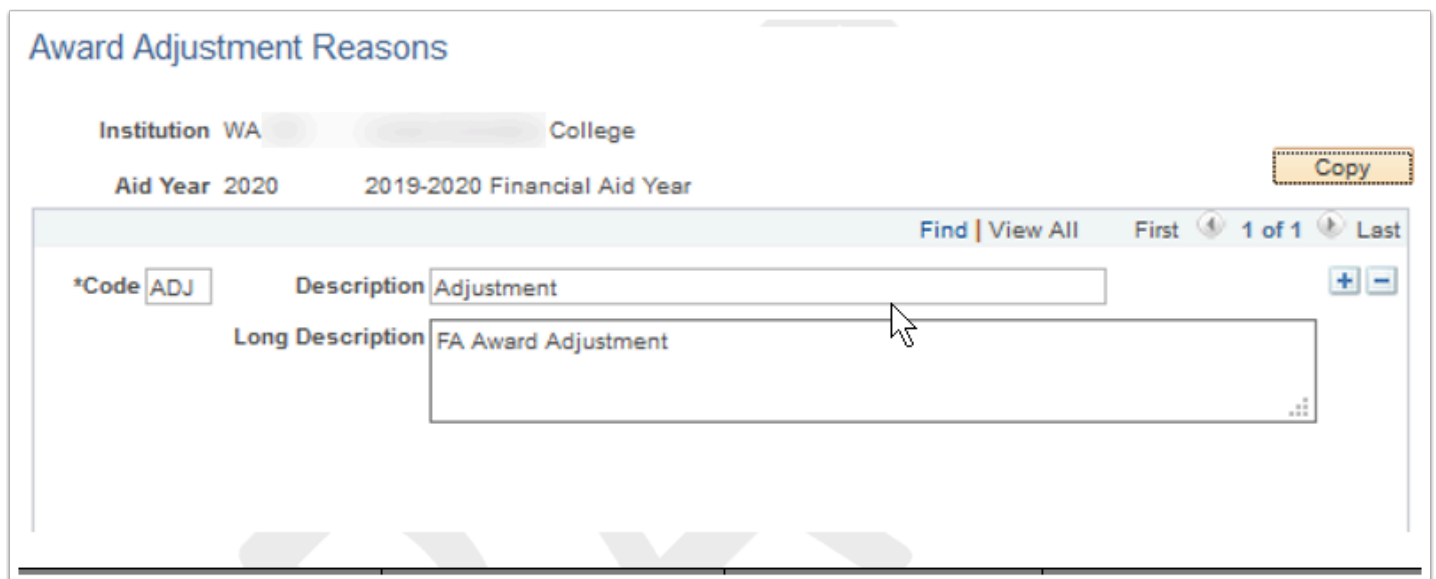
Security:

- 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.



The screenshot shows the 'Award Adjustment Reasons' configuration interface. At the top, there are filters for 'Institution' (set to 'WA') and 'College'. Below these are 'Aid Year' (set to '2020') and '2019-2020 Financial Aid Year'. A 'Copy' button is located in the top right corner. The main area contains a table with one entry. The table has columns for '*Code' (set to 'ADJ'), 'Description' (set to 'Adjustment'), and 'Long Description' (set to 'FA Award Adjustment'). The table is currently showing 1 of 1 records. Navigation buttons for 'Find', 'View All', 'First', 'Last', and a 'Copy' button are visible at the top of the table. A mouse cursor is pointing at the 'Description' field.

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.

Award Messages

SetID WA
Aid Year 2020 2019-2020 Financial Aid Year

Find | View All First 1-4 of 7 Last

*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: www.opportunitypathway.wa.gov
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 https://studentaid.ed.gov/sa/types/loans . 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 year (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	AWV	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

No Match Found

New

Update

Suspend

Ignore

Match(es) Found

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.

Authorization Calendar

Disbursement Calendar

Institution WA

College

Aid Year 2020

2019-2020 Financial Aid Year

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

+ -

☒ Reauthorize All Aid

*Career UGRD Academic

*Term 2197

FALL 2019

+ -

☒ Reauthorize All Aid

*Career UGRD Academic

*Term 2201

WINTER 2020

+ -

☒ Reauthorize All Aid

*Career UGRD Academic

*Term 2203

SPRING 2020

+ -

☒ 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"/> 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

☐ Bdgt/Term Load Match Disbursement Proration Rule

☒ Awd/Term Load Match Use Current Load

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	Res State
Acad Stand Hold	Country
Form of Study	Group
Sport	Acad Plan
Athletic Participation Code	Sub-Plan

FFELP Tolerance Amount \$0 Tolerance Amount \$0

Min GPA on FA Term 0.000

Min GPA Prior FA Term 0.000

Minimum Units 0.00 Use Current Units

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

ELC000 Birth Certificate

ELC005 GED

Tracking Find First 1 of 1 Last

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 AcadPlanChg

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	MUSMUAA	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

Personalize | Find | 1-8 of 8 | First | Last

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-based configuration interface for loan counseling. 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. Both sections have radio buttons for 'Required Once' (selected) and 'Required Annually'. The 'Entrance Counseling URL' and 'Exit Counseling URL' are both set to 'http://www.studentloans.gov'. The 'Exit Interview Requirement' section also includes a checked 'Use Default Exit Date' checkbox and an 'Exit Date Calculation Choice' of 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_CNSL_SETUP

Page: SFA_LN_CNSL_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](#) [View 2](#) 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_CNSL_SETUP

Page: SFA_LN_CNSL_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

☒ COD Full Participant ☒ DL Serial MPN Activation ☐ EDE Special School

Institution Address

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
☐ Loan Cosigner Required Nbr Csg Rq
Cosigner Required Amt \$0
Loan Fee Rate 4.248%
*Max Nbr Disbs 20
Min Loan Amt 100

Loan Item Types
*SetID WA *Item Type 961000004100 PLUS Loan - Parent 1
Find First 1 of 1 Last

Loan Fees
Personalize Find View All 1-2 of 2 First Last

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

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)

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

Direct Loan Options

Days to Add to Inserted Disb

DL Disbursement Option

DL Transmit Disb Option

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 Checklist

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 | 1 of 1 First 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:

- Aid Year:** 2020
- Academic Institution:** WA
- Pell ID Reporting:** 00: [Search Icon] COLLEGE
- *TG Number:** 53012
- 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:** [Dropdown]
- Hours/Credits in Acad Year:** 36
- Pell Just In Time Institution:** ☐
- Weeks in Program Acad Year:** 36
- OPE ID Number:** 00000000
- Maximum Pell Award:** 6195
- Max EFC:** 5578
- Disbursement Request Offset:** [Input Field]
- SFA Common School ID:** 6
- COD Full Participant:** ☒
- Buttons:** Copy Pell Payment Option, Find, View All, First, 1 of 1, Last
- Link:** Career - Program Detail

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

☐ Originate Offered Awards
 ☒ Hold Corrections

☒ Use Fulltime Enrollment
 ☒ Disb Prior to Transmitting Rec

☐ Originate Max Pell Award
 ☒ 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:	
Find View All First 1 of 1 Last	
*Eff Date <input type="text" value="01/01/1901"/> Status <input type="text" value="Active"/>	
ISIR Load Parameters	
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> ISIR Load Options <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Use Current Date As Effdt <input type="checkbox"/> Call INAS </div> <div> <input checked="" type="checkbox"/> Load NSLDS Data <input type="checkbox"/> Require FA Term </div> </div> </div> <div style="width: 45%;"> Update Address Options <div style="display: flex; justify-content: space-between;"> <div> <input type="radio"/> Discard Incoming Address <input checked="" type="radio"/> Add if blank - Do not update <input type="radio"/> Always Update </div> <div> <input type="checkbox"/> Override Address Type </div> </div> </div> </div>	
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> Update Email Options <div> <input type="radio"/> Discard Incoming EM <input checked="" type="radio"/> Add if blank <input type="radio"/> Always Update </div> </div> <div style="width: 30%;"> Update Phone Options <div> <input type="radio"/> Discard Incoming PH <input checked="" type="radio"/> Add if blank <input type="radio"/> Always Update </div> </div> <div style="width: 30%;"> Update Drivers License Options <div> <input type="radio"/> Discard Incoming DL <input checked="" type="radio"/> Add if blank <input type="radio"/> Always Update </div> </div> </div>	
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Update Name Options <div> <input type="checkbox"/> Update </div> </div> <div style="width: 45%;"> Update Bio/Demo Options <div> <input type="checkbox"/> Update </div> </div> </div>	

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:	
Find View All First 1 of 1 Last	
Eff Date 01/01/1901 Status Active	
ISIR Load Parameters	
ISIR Routing Controls	
Student Status Add Level: <input type="text" value="0 - Load everyone"/>	
Student Status Suspend Level: <input type="text" value="0 - Anyone not loaded"/>	
Inst. Review Status Completed: <input type="text" value="Suspend Incoming Record"/>	
Ed Verification Completed: <input type="text" value="Suspend Incoming Record"/>	
ISIR Rejects: <input type="text" value="Load Record"/>	
System Generated Load Option	
System Generated ISIR Action: <input type="text" value="Load Record"/>	
EFC Override Option	
*EFC Override Encountered: <input type="text" value="Suspend Incoming Record"/>	

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 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

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

*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

One Match:

☒
☐

Multiple Matches:

☐
☒

Order Nbr 20 DOB, Lname10, Fname2

One Match:

☐
☒

Multiple Matches:

☐
☒

Order Nbr 30 SSN, Lname6, Fname2

One Match:

☐
☒

Multiple Matches:

☐
☒

Order Nbr 40 SSN, DOB

One Match:

☐
☒

Multiple Matches:

☐
☒

Order Nbr 50 SSN only

One Match:

☐
☒

Multiple Matches:

☐
☒

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.

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

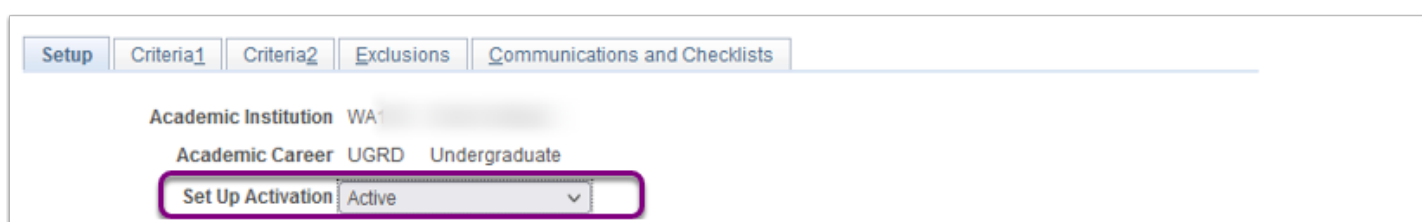
Exception Fail Default Status: FLOV

Zero Earned Units Default Stat: ZERO

Set Up Activation

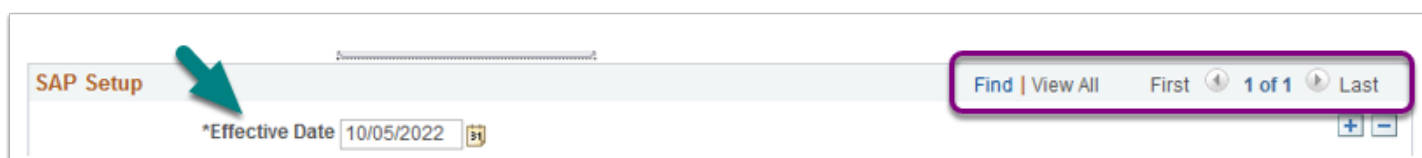
The **Set Up Activation** field defines whether the SAP setup is active or inactive at this institution, which impacts whether the SAP field is editable on the Packaging Status Summary page:

- 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 configuration page with tabs: Setup, Criteria1, Criteria2, Exclusions, and Communications and Checklists. Under the Setup tab, there are fields for Academic Institution (WA), Academic Career (UGRD Undergraduate), and Set Up Activation (Active). The Set Up Activation field is highlighted with a red box.

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 with a red arrow pointing to the *Effective Date field (10/05/2022). To the right, there are navigation options: Find | View All, First, 1 of 1, and Last. The navigation options are 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' window. At the top, there is a search bar with 'Find | View All' and navigation buttons 'First', '1 of 1', and 'Last'. Below this, there is a field for '*Effective Date' set to '10/05/2022'. The main section is titled 'SAP Process Type' and contains a dropdown menu labeled '*SAP Process Type' with 'Term' selected. The dropdown menu is highlighted with a red rectangle.

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.

The screenshot shows the 'Status Codes' table in the SAP Setup interface. The table has five columns: 'Calc Status', 'Severity', 'Short Description', 'Description', and 'SAP Status'. There are five rows of data. The table is numbered 1 through 5 in the top left corner. The table is titled 'Status Codes' and has a search bar with 'Personalize | Find | View All' and navigation buttons 'First', '1-5 of 13', and 'Last'.

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.

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

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**.

The screenshot displays the 'SAP Setup' page for 'Criteria 1'. It includes tabs for 'Setup', 'Criteria1', 'Criteria2', 'Exclusions', and 'Communications and Checklists'. The 'Criteria1' tab is active, showing the 'SAP Setup' section with an 'Effective Date' of 04/30/2019. Below this, there are sections for 'Statuses and Actions', 'Academic Standing Test', 'Maximum Attempted Units Test', and 'Maximum Attempted Terms Test'.

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 ☒ 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 **Statures and Actions**

Setup | Criteria1 | Criteria2 | Exclusions | Communications and Checklists

Academic Institution WA
Academic Career UGRD Undergraduate

SAP Setup
Effective Date 12/22/2022

Statures and Actions
☒ Use Statures and Actions

Statures 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

☒ Towards GPA

☒ No GPA

☒ Course Credit

☒ Test Credit

☒ Other Credit

☒ 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 displays the 'SAP Setup' interface for configuring Maximum Attempted Terms Test Configuration. The interface includes several tabs at the top: Setup, Criteria, Exclusions, and Communications and Checklist. The main section is titled 'SAP Setup' and includes a 'Find' button and a 'View All' button. Below this, there are several sections for configuring tests:

- Minimum Current GPA Test:** Includes a checkbox for 'Use Min Current GPA Test' and a table for 'Minimum Current GPA Rules' with columns for Academic Program, Academic Plan, Cumulative Units From, Cumulative Units To, Min Cum GPA From, Min Cum GPA To, and SAP Status.
- Minimum Cumulative GPA Test:** Includes a checkbox for 'Use Min Cumulative GPA Test' and a table for 'Minimum Cumulative GPA Rules' with columns for Academic Program, Academic Plan, Cumulative Units From, Cumulative Units To, Min Cum GPA From, Min Cum GPA To, and SAP Status.
- Current Earned Units Test:** Includes a checkbox for 'Use Current Earned Units Test' and a table for 'Current Earned Units Rules' with columns for Academic Program, Academic Plan, Cumulative Units From, Cumulative Units To, Min Cum GPA From, Min Cum GPA To, and SAP Status.
- Cumulative Earned Units Test:** Includes a checkbox for 'Use Cumulative Earned Units Test' and a table for 'Cumulative Earned Units Rules' with columns for Academic Program, Academic Plan, Cumulative Units From, Cumulative Units To, Min Cum GPA From, Min Cum GPA To, and SAP Status.
- Two Year GPA Test:** Includes a checkbox for 'Use Two Year GPA Test' and a table for 'Two Year GPA Rules' with columns for Academic Program, Academic Plan, Cumulative Units From, Cumulative Units To, Min Cum GPA From, Min 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 Exclusions screen. The top navigation bar includes tabs for Setup, Criteria1, Criteria2, Exclusions, and Communications and Checklists. The main content area is titled 'SAP Setup' and includes an 'Effective Date' of 04/30/2019. The 'Course Exclusions' section has a checked 'Use Course Exclusions' checkbox and fields for 'Max Units to Exclude', 'Max ESL Units to Exclude', and 'Max Remedial Units to Exclude' (45.00). The 'Award Exclusions' section has a checked 'Use Award Exclusions' checkbox and fields for 'Source', 'Fin Aid Type', 'Item Type From', and 'Item Type To'. The 'Grade Exclusions' section has an unchecked 'Use Grade Exclusions' checkbox. The bottom section includes 'Events' and 'Communication Comments' with search and filter options.

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.

Define Evaluation Terms

Academic Institution WA College
Academic Career UGRD Academic Career

Terms Find | View All First 17 of 20 Last

*Term 2195 SUMMER 2019

Evaluation Terms Personalize | Find | 1 of 1 First Last

*Term	Description
1 2193	SPRING 2019

*Term 2197 FALL 2019

Evaluation Terms Personalize | Find | 1-2 of 2 First Last

*Term	Description
1 2193	SPRING 2019
2 2195	SUMMER 2019

*Term 2201 WINTER 2020

Evaluation Terms Personalize | Find | 1 of 1 First Last

*Term	Description
1 2197	FALL 2019

*Term 2203 SPRING 2020

Evaluation Terms Personalize | Find | 1 of 1 First Last

*Term	Description
1 2201	WINTER 2020

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 **Aid Year**
 *Need Methodology **Federal**

*Summary Link **Summary Page**

Alternate Text

*Summary Link Label **Financial Aid Summary**

*Academic Year Award Period **Academic Year**

*Non-Standard Award Period **Summer Term**

View Award Notification

SAP Link Label

Sort Order

*Term **Ascending**

*Award **Ascending**

[Inquiry](#)
[Awarding](#)
[Loan](#)
[SAP](#)
[Disbursement](#)

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

Self Service Award Processing

Access Criteria

Access Criteria	Operator	Value
<input type="checkbox"/> FA Application Status		
<input type="checkbox"/> Processing Status		
<input type="checkbox"/> FED Verification Process		
<input type="checkbox"/> INST Verification Process		
<input checked="" type="checkbox"/> Satisfactory Academic Progress	Not Equal	Not Meeting Satis Acad Prgrs
<input checked="" type="checkbox"/> Award Notification Complete	Equal to	

Category **FACTGY** Context **FACNXT** Letter

Consumer Information URL **<https://lowercolumbia.edu/financial-aid/index.php>**

Entrance Interview URL **<https://studentloans.gov/myDirectLoan/index.action>**

Processing Option

☐ Batch
 ☒ Real time

External Award Reporting

☐ Access from Award Inquiry
 Alternate Text for Reporting **Report Other Financial Aid**

☐ Access from Accept/Decline
 Alternate Text for List View **Aid from Other Sources**

☐ 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://loc.etc.edu/info/webresources/Financial%20Aid%20Forms/Satisfactory-Academic-Progress.pdf

SAP Status Message

[Personalize](#) | [Find](#) | [View All](#) | [1-5 of 5](#) | [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 Satisfactory Academic Progress	Not Meeting Satisfactory Academic Progress	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 Satisfactory Academic Progress	Meeting Satisfactory Academic 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.

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

User ID

Name

Academic Institution

WA

College

Career Group SetID

WA

College

Facility Group SetID

WA

College

Academic Career

UGRD

Academic Career

Academic Group

Subject Area

Term

Academic Program

Academic Plan

Academic Sub-Plan

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

User ID Name

SetID College

Aid Year 2019-2020 Financial Aid Year

Business Unit 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 College

*Administrative Function Default Comm Key ☐ No Default

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

Communication Key
☐ Default Comm Key

Description Award Notification

Short Desc Award Notif

Category FACTGY FA Aid Year Comm Category

Context FACNXT Financial Aid Comm Context

Duration

Method E Email Direction OUT Letter Code J80

Comment

Communication Key
☐ Default Comm Key

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

Communication Key
☐ 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 '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'. The 'Equation Edit Function' is set to a dropdown menu. The main section is 'Equation Detail', which contains a table with columns: Sel, Line, Keyword, Operand Type, Operand, and Comment. The table lists 18 lines of code, including 'Skip', 'Assign', 'End Assign', and 'Assign' statements with various operands like 'A_SELECT', 'F', 'SQL_RC', 'SQL_COUNT', 'FIRST_ROW', 'LOCAL_INSTITUTION', 'INSTITUTION', 'LOCAL_AID_YEAR', and 'AID_YEAR'. A mouse cursor is pointing at the 'FIRST_ROW' operand in 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 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_PRCs_CMP

Page: CTC_EQ_PRCs_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 |
1-10 of 128
First
Last

	*Ethnicity Category		*Ethnic Group		
1	IsOfHispanicOrigin		ARGEN	+	-
2	IsRaceNativeHawaiianPacific		HAWAIIA	+	-
3	IsRaceOther		NSPEC	+	-
4	IsRaceWhite		WHITE	+	-
5	IsRaceBlackAfricanAmerican		BLACK	+	-
6	IsRaceAsian		PHILIP	+	-
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 College

Aid Year 2020 2019-2020 Financial Aid Year

Copy

Award Amounts		Find View All	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 College
Aid Year: 2020

Personalize Find View All				First	1-4 of 4	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 College
Aid Year: 2020

Term Setup
Find | View All
First 1 of 1 Last

*Career: UGRD

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

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

State Work Study

Item Earning Code Crosswalk

new window

Crosswalk for Earning Codes and FA Item types

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

	*Item Type	Item Description	*Earnings Code	Earning Code Description		
1	931000000000	Federal Work Study	FWF	Fed Coll W/S - Off Campus	+	-
2	931000000000	Federal Work Study	FWS	Federal Work-Study	+	-
3	931000000100	Federal Work Study Off Campus	FVW	Fed Vocational Work Study	+	-
4	932000000000	State Work Study	SWS	State Work-Study	+	-
5	932000000100	State Work Study Off Campus	SWF	St Work Study-Off Campus	+	-
6	932000000600	WorkFirst Work Study	WON	Work First On Campus	+	-
7	932000000605	WorkFirst WorkStudy Off Campus	WFS	Workfirst/Workstudy	+	-
8	933000000000	Institutional Work Study	IAW	Athletic Work Study	+	-
9	933000000000	Institutional Work Study	IGW	Student Govt Work Study	+	-
10	933000000000	Institutional Work Study	IWS	Institutional Work/Study	+	-

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

Checklist Item Table

Checklist Item Code ELC000

Item Code Detail

*Effective Date 01/01/1901 *Status Active

*Checklist Code Descr Birth Certificate

Short Description BirthCert

Item Association

Comments

There are discrepancies with your date of birth. Please bring your birth certificate to the Financial Aid office.

Fluid Field Display

☐ Organization

☒ Variable Data

☒ Status

☒ Status Date

☒ Contact Name

☒ Contact Email

☒ Due Date

Action Button Label

Menu Name

Component Name

Page Name

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

Short Description Bcert

*Function FINA Financial Aid

Checklist Type Requirements List

☒ Display in Self Service

Due Days 30

Due Date

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 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 College

Event ID FISELC0001

Event Detail Find | View All First 1 of 1 Last

*Effective Date 01/01/1901 *Status Active

*Description I-Birth Certificate

*Short Description I-BirthCer ☐ User Selection

*Function FINA Financial Aid Variable Data Joint Rules

Communications

Communication Key Detail

Comments

*Comment Category Detail

Checklists

*Checklist Code ELC000 Birth Certificate Detail ☐ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	ELC000	BirthCer	201344784	Initiated		30	

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 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: LC0

*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 SQC 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: CTCFA_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

Communication Context Description

*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

Communication Context Description

*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 Date01/01/1901

*StatusActive

*DescriptionFA Aid Year Comm Category

Short DescriptionFA Com Ctg

*FunctionFINA

Financial Aid

Communication Context

*Context	Description
FACNXT	Financial Aid Comm Context

Add

Communication Categories

Academic Institution WA College

Communication Category FAGEN

Communication Category Description

Find | View All First 1 of 1 Last

*Effective Date01/01/1901

*StatusActive

*DescriptionFinancial Aid GEN Admin Func

Short DescriptionFinAid GEN

*FunctionGEN

General

Communication Context

*Context	Description
FAGEN	Financial Aid GEN Admin Func

Add

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

Communication 3C Groups

Institution WA College

Category FACTGY FA Aid Year Comm Category

Function Financial Aid

Update/Inquiry Group

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

Communication 3C Groups

Institution WA College

Category FAGEN Financial Aid GEN Admin Func

Function General

Update/Inquiry Group

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

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

FAAWARD

☐ Print Comment

*Description

Award Notification

☐ Activity Completed

Short Desc

AwdNotif

☐ Unsuccessful Outcome

*Category

FACTGY

FA Aid Year Comm Category

*Context

FACNXT

Financial Aid Comm Context

Duration

*Method

E

Email

Direction

OUT

Letter Code

J80

Comments

Communication Key

FAINITAL

☐ Print Comment

*Description

Initial Financial Aid Request

☐ Activity Completed

Short Desc

FA Int Req

☐ Unsuccessful Outcome

*Category

FACTGY

FA Aid Year Comm Category

*Context

FACNXT

Financial Aid Comm Context

Duration

*Method

E

Email

Direction

OUT

Letter Code

J83

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

FAELNRPM

☐ Print Comment

*Description

Entering Loan Repayment Ltr

☐ Activity Completed

Short Desc

Ent Ln Rpy

☐ Unsuccessful Outcome

*Category

FATCGY

FA Term Comm Category

*Context

FACNXT

Financial Aid Comm Context

Duration

*Method

E

Email

Direction

OUT

Letter Code

J8A

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 form for defining a report. At the top, there are tabs: Definition (selected), Template, Output, Properties, Security, and Bursting. The form is divided into two main sections: Data Source and Report Properties.

Data Source Section:

- Report Name: CTCFA_LC_J80
- Data Source Type: XMLDoc Object (with a "Change Data Source" link)
- Data Source ID: CTC_FA_DATASOURCE_AWARD
- Data Source Description: FA Datasource for Awards

Report Properties Section:

- Report Description: Award Notification
- *Report Status: Active (dropdown)
- *Report Category ID: FA (dropdown) with a search icon and "CC FA Admin" text
- Owner ID: Financial Aid (dropdown)
- *Template Type: RT (dropdown)
- Retention Days: (empty text box)
- Registered Date/Time: 06/06/2016 2:02:27PM
- Registered By: CIBER_FUNCTIONAL
- Updated Date/Time: 10/13/2016 1:02:03PM
- Updated By: CIBER_FUNCTIONAL

At the bottom, there are buttons for "Add", "Update/Display", "Include History", and "Correct History". Below these are links for "Return to Search", "Previous in List", and "Next in List".

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

Description AWDNOTIFICATION_Email LCC

*Language Code English

Channel Email

☒ Default Template

Template Files Find | View All First 1 of 1 Last

Effective Date 01/01/1901

*Status Active

Use Data Transform

Template File CTCFA_LC_J80_AWDNOTIFICATION_EMAIL.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		True
pdf-hide-menubar		False
pdf-hide-toolbar		False
pdf-replace-smartquotes		True

Add Update/Display Include History Correct History

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

Report Name: CTCFA_LC_J80

Report Viewers

☒ Allow viewer ID assignment at report runtime

Report Viewers View All | 1 View First 1 of 1 Last

ID Type	Distribution ID	Description

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.

Comment Category Table
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

Academic Institution: [WA] [Search]
 Comment Category: [begins with] [Search]
 Description: [begins with] [Search]
 Administrative Function: [begins with] [Search]

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-6 of 6 Last

Academic Institution	Comment Category	Description	Administrative Function
WA	FAGEN	Financial Aid General Comment	FINA
WA	FAWDS	Awarding and Packaging	FINA
WA	FCANCL	Cancelled Checks/Returned Fund	FINA
WA	FFILE	File Completion Information	FINA
WA	FLOANS	Loan Eligibility Status	FINA
WA	FRERAY	Repayment	FINT

Comment Categories

Academic Institution: WA College
 Comment Category: FAGEN

Category Details

*Effective Date: 01/01/1901 *Status: Active
 *Description: Financial Aid General Comment
 Short Description: FA Gen
 *Administrative Function: FINA Financial Aid
 Comments: [Text Area]
 *Changes Allowed: Append

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.

Comment 3C Groups

Academic Institution WA [redacted] a College

Comment Category FREPAY Repayment

Administrative Function Financial Aid Term

Update/Inquiry Group

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

Add

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 College

Functional Area: Financial Aid

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

*Business Process: Award Notifications 2019

Description: Award Notifications 2019

Max Size Allowed: 150 MB (Only for Upload)

File Path

Upload: <intentionally blank>

Download: /u01/app/psrepo/Interface/CSTRANSFER/WA /Award

*Business Process: Award Notifications 2020

Description: Award Notifications 2020

Max Size Allowed: 150 MB (Only for Upload)

File Path

Upload: <intentionally blank>

Download: /u01/app/psrepo/Interface/CSTRANSFER/WA /Award

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