# 9.2 Assigning a College Financing Plan

**Purpose**: Use this document as a reference for how to assign and view a College Financing Plan (formerly Shopping Sheet) in ctcLink.

Audience: FA Counselor/Technician.

- You must have at least one of these local college managed security roles:
- ZD FA Director
- ZD FA Student Aid Info
- ZZ FA Student Aid Info

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

### **Assign a College Financing Plan**

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

- 1. The **View Packaging Status Summary** page displays.
- 2. Populate the field College Financing Plan Group with SHOPGRP01.
- 3. Select the **Save** button.

#### **Packaging Status Summary** # Aid Year 2023 2022-2023 Financial Aid Year Institution WA030 ★ ② EFC Status Official TERM ISIR Information Database Matches Need Summary Counselor Academic Career UGRD Q Undergraduate Counselor Q Aid Processing Status Packaging Completed SAP Details Aid Application Status Application Active for All Aid \*Satisfactory Academic Progress Meeting Satis Acad Progress V Review Status Review Complete Disbursement Hold INST Verification Status Non Select Loan Counseling Status Verification Flag Not Required Verification Status Not Selected Financial Aid Awarded Award Notification Scholarship Status Not Evaluated \*Aid Packaging Method | Counselor Packaged Packaging Plan ID SUMR ONLY Q Summer Only Awarding Access Allow Access Q ✓ Inquiry Access Repackaging Plan ID ☐ External Award Access Aggregate Source FA Installation Default Aggregate Source Used NSLDS Total College Financing Plan Group SHOPGRP01 Q ☐ Limited Pell Grant Indicator Shopping Sheet Group 1 Return to Search Notify

Note: If a student has not been awarded, a College Financing Plan will not be viewable.

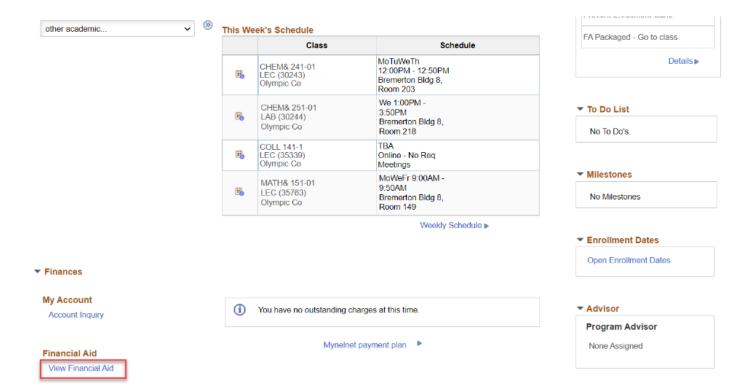
### Viewing an Assigned College Financing Plan

- You must have at least one of these local college managed security roles:
- ZC CC Personal Info Student
- ZD CC Personal Info Student
- ZD CC Super user
- ZZ CC Pers Info NID Update
- ZZ CC Personal Info Student
- ZZ SS Advisor
- ZZ SS Faculty

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

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

- 1. The Student Services Ctr (Student) search page displays.
- 2. Enter the student ID.
- 3. Select the **Search**.
- 4. The Student Services Ctr page displays.
- 5. Select the View Financial Aid link under the Financial Aid section.



- 6. The Financial Aid search page displays.
- 7. From the **Select Aid Year to View** section select the aid year you wish to view.

#### Select Aid Year to View

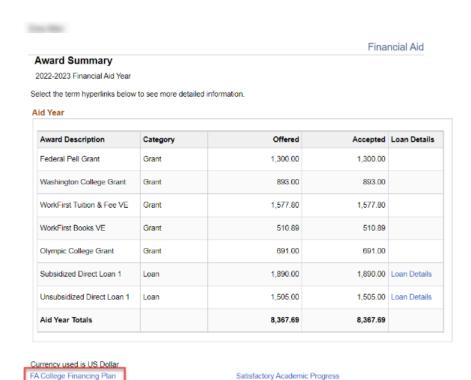
Select the aid year you wish to view

Aid Year	Institution	Aid Year Description
2023	Olympic College	2022-2023 Financial Aid Year
2022	Olympic College	2021-2022 Financial Aid Year
2021	Olympic College	2020-2021 Financial Aid Year
2020	Olympic College	No self-service access for this aid year.

Aid years listed indicate your access to eligibility information regarding your Financial Aid Application.

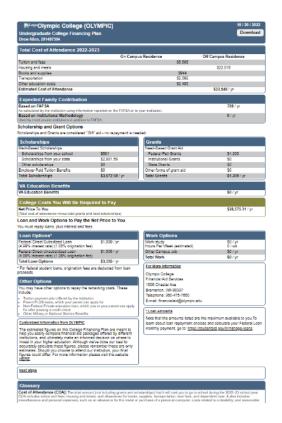


- 8. The Award Summary page displays.
- 9. Select the FA College Financing Plan link.



10. The College Financing Plan will open in a separate window.

Loan Counseling



## 11. Process complete.