

9.2 Student Services Center (Financial Aid)

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

Audience: Financial Aid staff, college staff.

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

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

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

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

Student Services Center (Financial Aid)

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

Institution/Aid Year Section

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

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

The screenshot shows the 'Financial Aid' tab selected in a navigation bar. Below the navigation bar, there is a section titled 'Institution / Aid Year' with a 'View Packaging Status Summary' button. A list of aid years is shown, with '2021 - 2022 Financial Aid Year' selected and highlighted. A red box and arrow point to this selection, with a circled '2' next to it. The detailed view for the 2021-2022 Financial Aid Year is displayed to the right.

WA220 - Tacoma CC	2021-2022 Financial Aid Year
↳ 2022 - 2021-2022 Financial Aid Year	Dependency Status Independent w/Primary EFC
↳ 2021 - 2020-2021 Financial Aid Year	EFC Status Official
	Date Application Received 10/24/2020
	Correction Status
	Correction Status Date n/a
	Aid Application Status Application Active for All Aid
	Package Status Applied
	Packaging Plan ID
	Review Status Incomplete
	INST Verification Status Non Select
	Verification Flag Not Required
	Verification Status Not Selected
	Fan Ltr Status
	SAP SAP Undetermined
	Fed Year COA 0.00
	Prorated EFC 0
	Currency used is US Dollar

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

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

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

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

Student Center | General Info | Admissions | Transfer Credit | Academics | Finances | **Financial Aid**

Institution / Aid Year View Packaging Status Summary

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

2021-2022 Financial Aid Year	5 Dependency Status	Independent w/Primary EFC
	4 EFC Status	Official
	Date Application Received	10/24/2020
	Correction Status	
	Correction Status Date	n/a
	Aid Application Status	Application Active for All Aid
	6 Package Status	Applied
	Packaging Plan ID	
	7 Review Status	Incomplete
	INST Verification Status	Non Select
	Verification Flag	Not Required
	8 Verification Status	Not Selected
	Fan Ltr Status	
	9 SAP	SAP Undetermined
	Fed Year COA	0.00
	10 Prorated EFC	0

Currency used is US Dollar

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

ID [REDACTED]

Student Center | General Info | Admissions | Transfer Credit | Academics | Finances | **Financial Aid**

Institution / Aid Year View Packaging Status Summary

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

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

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

ID

Student Center | General Info | Admissions | Transfer Credit | Academics | Finances | **Financial Aid**

Institution / Aid Year View Packaging Status Summary

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

2020-2021 Financial Aid Year

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

Currency used is US Dollar

Award Summary for Aid Year Section

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

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

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

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

Student Award Inquiry

Currency used is US Dollar

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

Award Summary | Award Term Summary

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

Award Summary

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

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Cancel

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

Award Disbursement Detail

Item Type 911000000000 Federal Pell Grant Award Status Accepted

Disbursement Plan 10 **Fall-Winter-Spring-Summer** Split Code XX

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

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[Return](#)

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

Award_Summary **Award Term Summary**

Aid Year 2021 2020-2021 Financial Aid Year ID WA220

Term Summary 1 of 4 View All

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

Item Type	Description	Career	Disbursement ID	Offered	Accepted	Authorized	Disbursed
1 911000000000	Federal Pell Grant	UGRD	01	2,115.00	2,115.00	2,115.00	2,115.00
2 91100000100	Supplemental Educ Opp Grant	UGRD	01	150.00	150.00	150.00	150.00
3 912000000000	Washington College Grant	UGRD	01	1,406.00	1,406.00	1,406.00	1,406.00
4 91200000100	Wa College Grant-Waitlist	UGRD	01	0.00	0.00	0.00	0.00
5 930000000000	Work Study Offer	UGRD	01	0.00	0.00	0.00	0.00
6 961000001110	Subsidized Direct Ln 1-New Fee	UGRD	01	0.00	0.00	0.00	0.00
7 961000002110	Unsubsidized Direct Ln 1-New F	UGRD	01	0.00	0.00	0.00	0.00

Cancel

Term Summary for Aid Year Section

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

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

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

37 Student Budget

[Go to top](#)

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

Student Budget Maintenance

Aid Year 2021 2020-2021 Financial Aid Year ID Institution WA220 [Update Need Summary](#)

Student Budget Summary

39 Career UGRD Undergraduate
 *Term 2213 SPRING 2021
 Award Period Academic
 Weeks of Instruction 12.0

42 [Need Summary](#) **40**

Budget Group

Effective Date 12/15/2020 Institutional Term COA 6,535.00
 Effective Sequence 1 Federal Term COA 6,535.00
 User ID FAPBUDMV **41** Pell Term COA 9,803.00
 Budget Group SYSTEM System Mass Budget Less than Half Time Pell COA 9,803.00

Budget Item

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

OK Cancel Apply

43. The Need Summary pagelet displays.

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

Need Summary

Award Period		Academic		EFC Status		Official	
Federal				Institutional			
	COA	19,805.00			COA	19,805.00	
	EFC	0	Mo. 9		EFC	0	Mo. 0.0
	Need	19,605.00			Need	19,605.00	
	Montgomery GI Bill/AmeriCorps	0			Montgomery GI Bill/AmeriCorps	0	
	Total Aid (Fed)	11,014.00			Total Aid (Inst)	0.00	
→	Unmet Need (Fed)	8,591.00			Unmet Need (Inst)	19,605.00	
	Unmet COA(Fed)	8,591.00			Unmet COA(Inst)	19,605.00	
Federal Calc Information				Institutional Calc Information			
Federal Rule Set CSS Rules				Institutional Rule Set Institutional EFC Used			

[Return](#)

47. End of review of Financial Aid tab in **Student Services Center (Student)**.