

# Update Pell COA for Students Not Budgeted for All Projected FA Terms in the Aid Year

**Purpose:** Use this document as a reference on how to obtain correct annual 'Pell Term COA' and 'Less Than Half Time Pell COA' amounts for students who are not budgeted for all **projected** Financial Aid Terms in the aid year.

**Audience:** FA Counselor/Technician

**i** On 06/24/2021 Image 20 was implemented into ctcLink and introduced a Pell COA bug. A workaround was provided until Image 22 (which contained the "fix") was added in ctcLink on 09/18/2021. However, on 05/22/2022 Oracle clarified the "fix" provided in Image 22 simplified how the budget formulas were calculated, and now requires, in addition to overriding FA Term to 'N'. This update mimics how after Census, FA term becomes inactive when there is no enrollment.

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

- ZC FA Term Prcs
- ZD FA Director
- ZD FA Term Prcs
- ZZ FA Term Prcs

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

## Pell COA - Updating FA Term to N Units

**Navigation:** Financial Aid > Financial Aid Term > Maintain Student FA Term

1. At the **Financial Aid Term Search Criteria** page, enter in the:
  - **Empl ID**
  - **Academic Institution**
  - **Aid Year**
2. Select the **Search** button.

3. At the **FA Term** tab, in the **Student Data** group Box, add a new effective-dated row for one of the projected FA terms the student will not attend in the aid year.
4. Select the **Acad Level** tab, and override **Financial Aid Load** to '**N**' - **No Units**.
5. Select the **Records/Term Info** tab, and override the **Weeks of Instruction** to '**0**'.
6. Select the **Save** button.
7. Repeat the same steps for other projected FA terms the student will not attend in the aid year before going to the screen to update budgets.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to [Pell COA Updating FA Term to N Units](#). This link will open in a new tab/window.

## Pell COA - Updating Student Budget

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

- ZD FA Budgets
- ZD FA Director
- ZZ FA Budgets

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

### Navigation: Financial Aid > Budgets > Create Student Budget

1. At the **Create Student Budget Search Criteria** page, enter:
  - **Empl ID**
  - **Academic Institution**
  - **Aid Year**

2. Select the **Search** button.
3. **Add rows for all four terms** in the **Aid Year** - the example displayed is for a header institution.
4. Select the **Build Budget** button.
5. Select the **Move Budget** button.

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**!** **IMPORTANT:** Before Navigating away from this page, you will need to select the Build Budget and Move Budget buttons, again. The process requires these steps to be run twice to trigger the COBOL to update the Pell COA values to update properly.

## Pell COA - Assign Awards to a Student page

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

- ZD FA Award Processing
- ZD FA Director
- ZZ FA Award Processing
- ZZ FA Award Processor

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

**Navigation: Financial Aid > Awards > Award Processing > Assign Awards to a Student**

1. At the **Assign Awards to a Student Search Criteria** page, enter:
  - **Empl ID**
  - **Academic Institution**
  - **Aid Year**
2. Select the **Search** button.
3. Select the **Retrieve** button - you should see Pell award as expected.
4. Select the **Disbursement** link to verify the Pell distributed as expected.
5. Select the **Validate** button - select **OK** to clear the Validation Success message.
6. Select the **Post** button - select **OK** to clear the Award Posting Success message.
7. End of procedure.

## View Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to [Pell COA - Assign Awards to a Student page](#). This link will open in a new tab/window.