9.2 Track Continued Student Eligibility for Aid

Purpose: To track student eligibility for financial aid using ctcLink.

Audience: Financial Aid staff.

Verify whether Service Indicator was correctly assigned to ineligible Academic Plans.

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

- ZD CC Service Indicate Student
- ZZ CC Service Indicate Student

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

Track Continued Student Eligibility for Aid

Mass Assign

Navigation: NavBar > Navigator > Campus Community > Service Indicators (Student) > Mass Assign

1. The Mass Assign run control search page displays.
2. Select the **Add a New Value** tab.
3. Enter the **Run Control ID**.
4. Select **Add** button.
5. The Mass Assign page displays.
6. Select the **Selection Tool** field and choose **PS QUERY** from the List.
7. Enter **CTC_FA_INELIG_PLAN_SI_ASSIGN** in the **Query Name** field.
8. Enter the **Institution**.
9. Select the **Edit Prompts** link.

10. The Query Prompts pagelet displays.
11. Enter values into the following fields:
    - **Academic Institution**
    - **Aid Year**
    - **Term**

12. Select the **OK** button.

13. The Mass assign page displays.
14. Select the **Preview Selection Results** link.

Mass Assign

Run Control ID MASS_ASSIGN   Report Manager   Process Monitor   [Run]

Population Selection
Selection Tool PS Query   Edit Prompts
Query Name CTC_FA_INELIG_PLAN_SI_ASSIGN 🔍   Launch Query Manager   [Preview Selection Results]

Service Indicator Data
*Institution Spokane CC
*Service Indicator Code 🔍
*Reason 🔍   ☐ Use System Date

Effective Period
Start Term 🔍   End Term 🔍
Start Date 📅   End Date 📅

Assignment Details
*Department 🔍
Reference
Amount   0.000   Currency Code USD 🔍 Dollar

Contact Information
Contact ID 🔍   Contact Person
Placed Person ID 🔍   Placed By

Comments

[Save] [Notify]   [Add] [Update/Display]

15. The Preview Selection Results display.
16. Select the **Return** button.

Preview Selection Results

[Return]

	Empl ID	Institution	Aid Year
1		WA171	2019
2		WA171	2019
3		WA171	2019
4		WA171	2019
5		WA171	2019
6		WA171	2019
7		WA171	2019
8		WA171	2019
9		WA171	2019
10		WA171	2019
11		WA171	2019
12		WA171	2019
13		WA171	2019
14		WA171	2019
15		WA171	2019
16		WA171	2019
17		WA171	2019
18		WA171	2019
19		WA171	2019
20		WA171	2019

17. The Mass Assign page displays.
18. Enter the **Service Indicator Code** in the Service Indicator Data section.
19. Enter the **Reason**.

20. Enter the **Start Date** in the Effective Period section.
21. Enter the **Department** if not already populated in the Assignment Details section.
22. Select the **Run** button.

23. The Process Scheduler Request page displays.
24. Select the **SCC_SI_ASSN** process.
25. Select the **OK** button.

26. The Mass Assign page displays.
27. Make note of the **Process Instance** number.
28. Select the **Process Monitor** link. The Process List tab displays.

Mass Assign

Run Control ID MASS_ASSIGN   Report Manager   Process Monitor   [Run]

Process Instance:27012891

Population Selection

Selection Tool [PS Query ▾]   Edit Prompts

Query Name [CTC_FA_INELIG_PLAN_SI_ASSIGN] 🔍   Launch Query Manager   Preview Selection Results

Service Indicator Data

*Institution [Spokane CC ▾]

*Service Indicator Code [F04] 🔍   FA Ineligible Academic Plan

*Reason [FIP] 🔍   Ineligible Acad Plan for FA   ☐ Use System Date

Effective Period

Start Term [2191] 🔍   WINTER 2019   End Term [ ] 🔍

Start Date [01/07/2019] 📅   End Date [ ] 📅

Assignment Details

*Department [99304] 🔍   SCC Financial Aid/Work Study

Reference [ ]

Amount [0.000]   Currency Code [USD] 🔍   Dollar

Contact Information

Contact ID [ ] 🔍   Contact Person [ ]

Placed Person ID [ ] 🔍   Placed By [ ]

Comments

[ ]

[💾 Save] [🔔 Notify]   [➕ Add] [📝 Update/Display]

---

29. The Process Monitor page displays.
30. From the Process List tab, select the **Refresh** button till the **Run Status** is **Success** and **Distribution status** is **Posted.**

[Process List] [Server List]

View Process Request For

User ID [_KFORSBERG] 🔍   Type [▾] [Last ▾]   [1] [Days ▾]   [Refresh]

Server [▾]   Name [ ] 🔍   Instance From [ ]   Instance To [ ]

Run Status [▾]   Distribution Status [▾]   ☑ Save On Refresh

Process List   Personalize | Find | View All | 🔲 | 📊   First ◀ 1 of 1 ▶ Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	27012891		Application Engine	SCC_SI_ASSN	CTC_KFORSBERG	01/24/2019 8:38:36AM PST	Success	Posted	Details

Go back to Mass Assign

[💾 Save] [🔔 Notify]

Process List | Server List

---

31. The Mass Assign process is now complete.

MANAGE SERVICE INDICATORS

> ℹ️ To validate the SI was assigned we'll navigate to the Manage Service Indicators page

Navigation: NavBar > Navigator > Campus Community > Service Indicators (Student) > Manage Service Indicators

1. The Manage Service Indicators search page displays.
2. Enter the **Empl ID** taken from the P**review Selection Results** in prior section.
3. Select the **Search** button.
4. The Search Results display.
5. Select the **EMPL ID**.

Manage Service Indicators

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

Find an Existing Value

▼Search Criteria

ID	begins with ▾		🔍
Academic Career	= ▾		▾
National ID	begins with ▾		
Campus ID	begins with ▾		
Last Name	begins with ▾		
First Name	begins with ▾		

☐ Case Sensitive

[Search]   [Clear]   Basic Search   📇 Save Search Criteria

6. The Manage Service Indicators page displays.
7. Enter the **Institution**.
8. Select the **Refresh** button.

Manage Service Indicators

Display	Effect	All	Institution	Spokane CC					Refresh ↻

+ Add Service Indicator

Service Indicator Summary

Personalize | Find | View All | 🗗 | 🖩   First ◀ 1-2 of 2 ▶ Last

Code	Code Description	Reason Description	Institution	Start Term		End Term	End Term Description	Start Date	End Date
F04	FA Ineligible Academic Plan	Ineligible Acad Plan for FA	WA171	2191	2019 WINTR			01/07/2019	
R01	Academic Warning	Advising Req	WA171	2111	2011 WINTR			03/23/2011	

+ Add Service Indicator

[Return to Search] [Notify]

9. The process to validate the Service Indicator was assigned is now complete.

VERIFY INELIGIBLE PLANS REPORT

ℹ Verify whether Ineligible Plans report displays results.

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

- ZD_DS_QUERY_VIEWER

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

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

1. Select the **Query Name** field and choose **CTC_FA_INELIG_PLAN_RPT** from the list.
2. Select the **Search** button.
3. The Search Results displays.
4. From the Search Results, select the **HTML** link. A new browser window will open.

5. The query page displays.
6. Enter the **Institution.**
7. Enter the **Aid Yr**.
8. Enter the **Term.**
9. Select the **View Results** button.

10. The information displayed are students that have an Academic Plan with a short description that begins with zero (ineligible for financial aid) and already have the service indicator value of 'F04' and Reason of 'FIP' assigned.
11. The process to run the Ineligible Plans report is complete.

Assign Checklist for Ineligible Academic Plan

> ⓘ You must have at least one of these local college managed security roles:
>
> • ZC CC 3Cs User
> • ZZ CC 3Cs User
>
>   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Campus Community > 3C Engine > Run 3C Engine

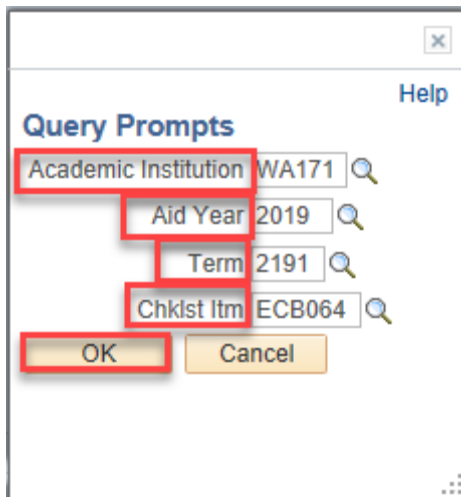1. The 3C Engine search page displays.
2. Enter the **Run Control ID**.

3. Select the **Search** button and select the link from the Search Results.
4. The Run 3C Engine page displays.
5. Select the **Population Selection c**heckbox on the 3C Engine Parameters tab.
6. Enter the **Academic Institution.**
7. Select desired value from the **Administrative Function** field.
8. Select desired value from the **Event ID** field.
9. Select **PS Query** from the **Selection Tool** field.
10. Choose **CTC_FA_INELIG_PLAN_CKL_ASSIGN** from the **Query Name** field.
11. Select the **Edit Prompts** field which opens a new window.
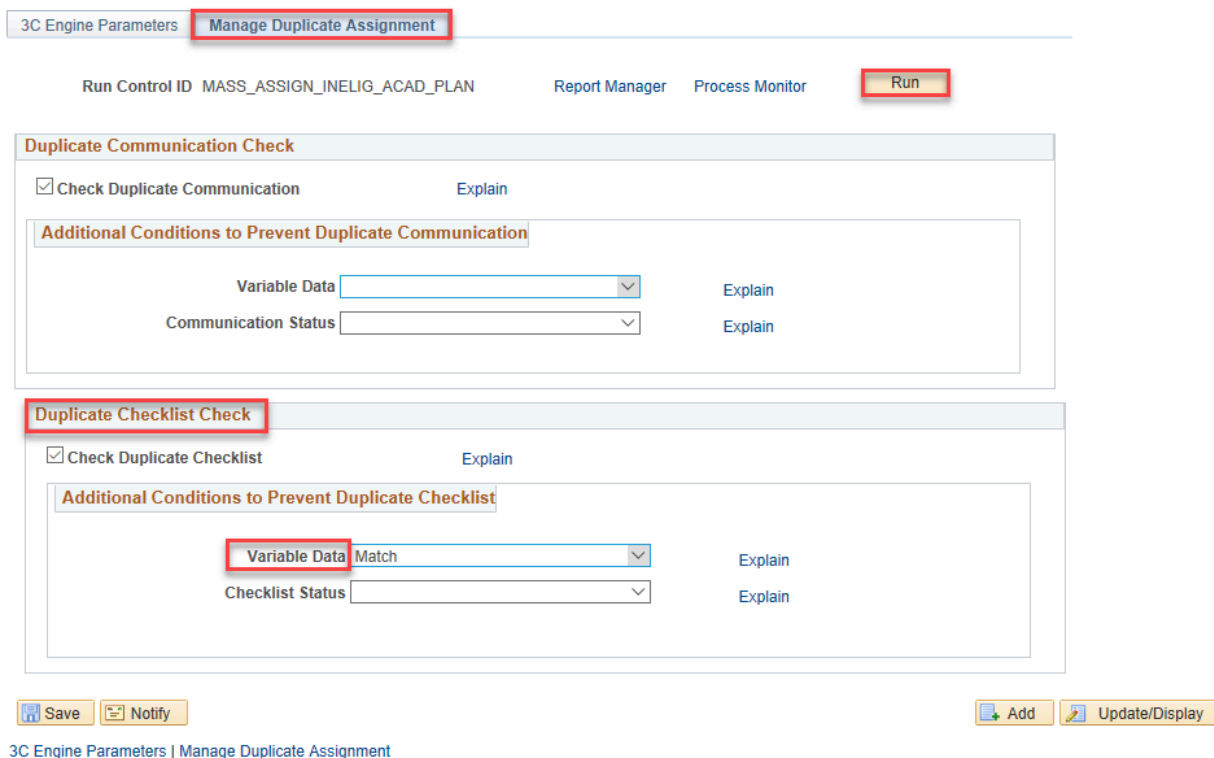
12. The Query Prompts pagelet displays.
13. Enter values into the following fields:
    • **Institution**
    • **Aid Year**
    • **Term**
    • **Checklist**

14. Select the **OK** button.

Query Prompts

Academic Institution WA171
Aid Year 2019
Term 2191
Chklst Itm ECB064

OK   Cancel

15. The Run 3C Engine page displays.
16. Select the **Manage Duplicate Assignment** Tab.
17. Select the **Variable Data** field under the **Duplicate Checklist Check** and choose **Match**.
18. Select the **Run** button.

19. The Process Scheduler Request page displays.
20. Select the **3C ENGINE** process and then the **OK** button.

Process Scheduler Request

User ID CTC_KFORSBERG   Run Control ID MASS_ASSIGN_INELIG_ACAD_PLAN

Server Name [▼]   Run Date 01/24/2019 [📅]
Recurrence [▼]   Run Time 9:31:34AM   [Reset to Current Date/Time]
Time Zone [   ][🔍]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	3C ENGINE	3CENGINE	Application Engine	Web ▼	TXT ▼	Distribution

[OK]   [Cancel]

21. The Run 3C Engine page displays.
22. Select the **Process Monitor** Link.
23. Select the **Refresh** button till the **Run Status** is **Success**.

Process List | Server List

View Process Request For

User ID _KFORSBERG [🔍]   Type [▼] [Last ▼]   [1] [Days ▼]   [Refresh]
Server [▼]   Name [   ][🔍]   Instance From [   ]   Instance To [   ]
Run Status [▼]   Distribution Status [▼]   ☑ Save On Refresh

Process List   Personalize | Find | View All | 🔲 | 🔳   First ◀ 1-2 of 2 ▶ Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	27012892		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:32:46AM PST	Success	Posted	Details
☐	27012891		Application Engine	SCC_SI_ASSN	CTC_KFORSBERG	01/24/2019 8:38:36AM PST	Success	Posted	Details

Go back to 3C Engine

[💾 Save] [📧 Notify]

Process List | Server List

24. The following screenshots demonstrate the applicable ID is now in an Initiated Status.

Person Checklist Detail

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

Find an Existing Value

▼ **Search Criteria**

ID	begins with ⌄ [____] 🔍
Sequence Number	= ⌄ [____4]
Administrative Function	begins with ⌄ [____] 🔍
Checklist Code	begins with ⌄ [____]
National ID	begins with ⌄ [____]
Campus ID	begins with ⌄ [____]
Last Name	begins with ⌄ [____]
First Name	begins with ⌄ [____]

☐ Case Sensitive

[Search] [Clear] Basic Search 📇 Save Search Criteria

Search Results

View All   First ◄ 1-4 of 4 ► Last

ID	Administrative Function	Checklist Code	National ID Country	NID Short Description	National ID	Date of Birth	Gender	Name	Campus ID	Last Name	First Name
	FINA	ESP008	USA	SSN	*********		Male			HILL	DANE
	FINA	FSP007	USA	SSN	*********		Male			HILL	DANE
	FINA	FSP031	USA	SSN	*********		Male			HILL	DANE
	FINT	ESP064	USA	SSN	*********		Male			HILL	DANE

Checklist Detail 1 | Checklist Detail 2

[____]   ID [____]   🚫

                                                        [Variable Data]

Checklist Date Time 01/24/2019 9:33:06AM

Administrative Function FINT   Financial Aid Term

Academic Institution Spokane CC

Checklist Code ESP064   Ineligible Academic Plan

Status Initiated   **Status Date** 01/24/2019

Due Date 02/23/2019

Due Amount   **Currency Code**

Comments [_____]

[💾 Save] [🔍 Return to Search] [⬆ Previous in List] [⬇ Next in List] [📧 Notify]

Checklist Detail 1 | Checklist Detail 2

25. You have successfully assigned a checklist for an ineligible academic plan.

Waive Checklist for Ineligible Academic Plan

Navigation: NavBar > Navigator > Campus Community > 3C Engine > Run 3C Engine

1. The Run 3C Engine search page displays.
2. Select **Add a New Value**.
3. Enter the **Run Control ID**.
4. Select the **OK** button.
5. Select the **Search** button and select the link.
6. The 3C Run Engine page displays.
7. Select the **Population Selection c**heckbox.
8. Enter the **Academic Institution.**
9. Select desired value from the **Administrative Function** field.
10. Select desired value from the **Event ID** field.
11. Select **PS Query** from the **Selection Tool** field.
12. Choose **CTC_FA_INELIG_PLAN_CKL_WAIVE** from the **Query Name** field.
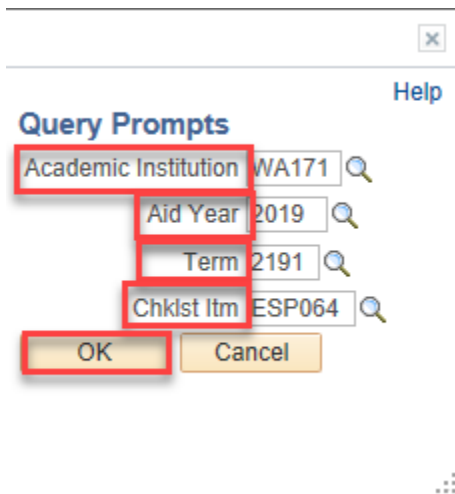13. Select the **Edit Prompts** field which opens a new window.

14. The Query Prompts pagelet displays.
15. Enter values into the following fields:
    - **Institution**
    - **Aid Year**
    - **Term**
    - **Checklist**

16. Select the **OK** button.
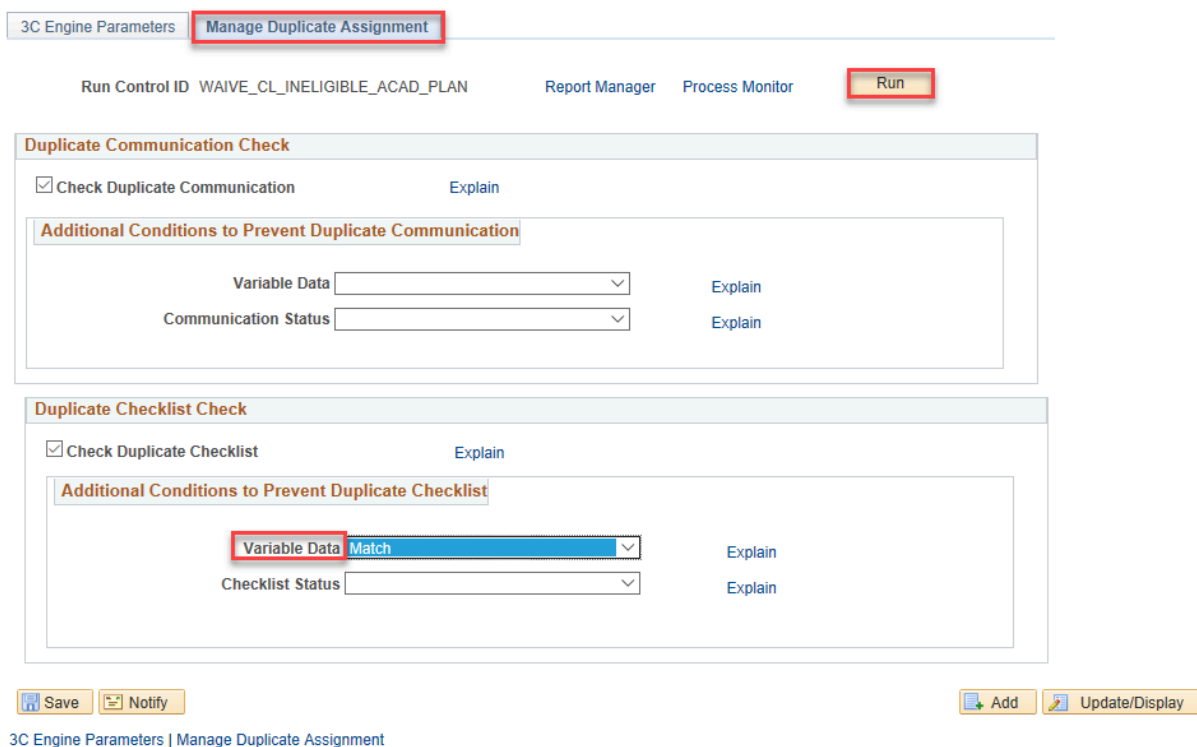
17. The Run 3C Engine page displays.
18. Select the **Manage Duplicate Assignment** Tab.
19. Select the **Variable Data** field under the **Duplicate Checklist Check** and choose **Match**.
20. Select the **Run** button.

21. The Process Scheduler Request page displays.
22. Select the **3C ENGINE** process and then the **OK** button.

Process Scheduler Request

User ID CTC_KFORSBERG   Run Control ID WAIVE_CL_INELIGIBLE_ACAD_PLAN

Server Name [▼]   Run Date 01/24/2019 [31]
Recurrence [▼]   Run Time 9:55:22AM   [Reset to Current Date/Time]
Time Zone [   ] [🔍]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	3C ENGINE	3CENGINE	Application Engine	Web ▼	TXT ▼	Distribution

[OK]   [Cancel]

23. The Run 3C Engine page displays.
24. Select the **Process Monitor** Link.
25. Select the **Refresh** button till the **Run Status** is **Success**.

Process List | Server List

View Process Request For

User ID [_KFORSBERG] 🔍   Type [▼] [Last ▼]   [1] [Days ▼]   [Refresh]
Server [▼]   Name [   ] 🔍   Instance From [   ]   Instance To [   ]
Run Status [▼]   Distribution Status [▼]   ☑ Save On Refresh

Process List   Personalize | Find | View All | [⤢] | [▦]   First ◄ 1-3 of 3 ► Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	27012893		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:55:22AM PST	Success	Posted	Details
☐	27012892		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:32:46AM PST	Success	Posted	Details
☐	27012891		Application Engine	SCC_SI_ASSN	CTC_KFORSBERG	01/24/2019 8:38:36AM PST	Success	Posted	Details

Go back to 3C Engine

[💾 Save] [📧 Notify]

Process List | Server List

26. The Waive Checklist for Ineligible Academic Plan process is complete.

VERIFY ACADEMIC PLANS REPORT CHANGED

ℹ️ Verify whether Academic Plans report is showing results for students that have changed academic plans, regardless of whether it's financial aid eligible or not.

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

- ZD_DS_QUERY_VIEWER

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

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

1. The Query Viewer search page displays.
2. Enter **CTC_FA_ACAD_PLAN_CHANGES_RPT** into the **Query Name** Field.
3. Select the **Search** button.
4. The Search Results display.
5. Select the **HTML** link.

Query Viewer

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

*Search By [Query Name ▾] begins with [CTC_FA_ACAD_PLAN_CHANGES_RPT]

[Search] Advanced Search

Search Results

*Folder View [-- All Folders -- ▾]

Query				Personalize	Find	View All	🔲	🖩		First ◀ 1-3 of 3 ▶ Last	
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
CTC_FA_ACAD_PLAN_CHANGES_RPT	Acad Plan Changes Report	Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Lookup References	Favorite
CTC_FA_ACAD_PLAN_CHANGES_RPT1	Acad Plan Changes Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CTC_FA_ACAD_PLAN_CHANGES_RPT2	Acad Plan Changes Report2	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

6. The chosen query page displays.
7. Enter the **Academic Institution**.
8. Enter the **Aid Year**.
9. Select the **Term** field.
10. Select the **View Results** button.
11. The information displayed are students that have changed Academic Plans, regardless of whether the new plan is FA eligible or not.

CTC_FA_ACAD_PLAN_CHANGES_RPT - Acad Plan Changes Report

Academic Institution WA171 🔍
Aid Year 2019 🔍
Term 2191 🔍
View Results

Download results in : Excel SpreadSheet   CSV Text File   XML File   (7603 kb)

View All   First 1-100 of 31160 ▶ Last

	Student First Name	Last	Employee ID	National ID	Term	Current Acad Plan	Previous Acad Plan
1					2191	LASDTAA	BUCBUAA
2					2191	LASDTAA	BUCBUAA

12. The process to verify whether Academic Plans report is showing results for students that have changed academic plans is now complete.

User Edit Message

ℹ️ Verify whether User Edit Message correctly got assigned where the Student is enrolled in classes not required for current Academic Plan.

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

- ZD FA Director
- ZD FA Disbursements
- ZZ FA Disbursements
- ZZ FA Funds Manager

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

Navigation: NavBar > Navigator > Financial Aid > Disbursement >Process User Edit Messages

1. The Process User Edit Messages search page displays.
2. Add a New **Run Control ID**.
3. Select the **Add** button.
4. The Process User Edit Messages page displays.
5. Select the **Selection Tool** field and choose **PS QUERY** from the list.
6. Enter **CTC_FA_INELG_COURSEWORK** from the **Query Name** field list.
7. Select the radio button of I**nsert Message** in the **Processing Mode**.
8. Select the **Edit Prompts** link.

9. The Query Prompts pagelet displays.
10. Complete the following fields:
    - **Institution**
    - **Aid Year**
    - **Term**

11. Select the **OK** button.

12. The Process User Edit Messages page displays.
13. Enter the **Institution.**
14. Enter the **Aid Year**.
15. Enter the **Term**.
16. Enter the **Msg Type**.
17. Enter the **Msg Code**.

18. Enter the **Msg Action**.
19. Select the **Run** button.

20. The Process Scheduler Request page displays.
21. Select the **SFA_EDIT_MSG Process Name**.
22. Select the **OK** button.

23. The Process User Edit Messages page displays.
24. Select the **Process Monitor** link.
25. Select the **Refresh** button until the **Run Status** is **Success**.

	Process List	Server List							

View Process Request For

User ID	CTC_KFORSB 🔍	Type		∨	Last	∨		1	Days	∨		Refresh
Server		∨	Name		🔍	Instance From			Instance To		
Run Status		∨	Distribution Status		∨	☑ Save On Refresh				

Process List   Personalize | Find | View All | 🔲 | 🔢   First ◀ 1-4 of 4 ▶ Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	27012894		Application Engine	SFA_EDIT_MSG	CTC_KFORSBERG	01/24/2019 10:27:31AM PST	Success	Posted	Details
☐	27012893		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:55:22AM PST	Success	Posted	Details
☐	27012892		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:32:46AM PST	Success	Posted	Details
☐	27012891		Application Engine	SCC_SI_ASSN	CTC_KFORSBERG	01/24/2019 8:38:36AM PST	Success	Posted	Details

Go back to Process User Edit Messages

💾 Save   📧 Notify

Process List | Server List

26. Process User Edit Messages is now complete.

VERIFY INELIGIBLE COURSEWORK REPORT

> ❗ You must have at least one of these local college managed security roles:
>
> • ZD_DS_QUERY_VIEWER
>
>   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Verify whether Ineligible Coursework report is showing results.

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

1. The Query Viewer search page displays.
2. Enter **CTC_FA_INELG_COURSEWORK_RPT** into the **Query Name** Field.
3. Select the **Search** button.
4. The Search Results display.
5. Select the **HTML** link.

Query Viewer

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

*Search By [Query Name ▼] [begins with] [CTC_FA_INELG]

[Search] Advanced Search

Search Results

*Folder View [-- All Folders -- ▼]

Query										
							Personalize | Find | View All | 🗗 | 📊		First ◀ 1-2 of 2 ▶ Last	
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References		Add to Favorites
CTC_FA_INELG_COURSEWORK	Unused courses	Public		HTML	Excel	XML	Schedule	Lookup References		Favorite
CTC_FA_INELG_COURSEWORK_RPT	Unused courses Report	Public		HTML	Excel	XML	Schedule	Lookup References		Favorite

6. The Query report criteria page displays.
7. Enter the **Academic Institution**.
8. Enter the **Aid Year**.
9. Enter the **Term**.
10. Select the **View Results** button.

CTC_FA_INELG_COURSEWORK - Unused courses

Institution [WA171] 🔍
Aid Year [2019] 🔍
Term [2191] 🔍
[View Results]

11. The Ineligible Coursework report has been run.
12. Process complete

ASSIGN USER EDIT MESSAGE

ℹ️ Assign UEM where the Student is attempting, has attempted and completed more than a cumulative total of 45 units in courses that are numbered below 100.

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

- ZD FA Director
- ZD FA Disbursements
- ZZ FA Disbursements

Navigation: NavBar > Navigator > Financial Aid > Disbursement > Process User Edit Messages

1. The Process User Edit Messages search page displays.
2. Select the **Add a New Value** tab.
3. Enter a **Run Control ID**.
4. Select the **Add** button.
5. The Process User Edit Messages page displays.
6. Choose **PS Query** from the **Selection Tool** field.
7. Enter CTC_FA_MAX_REMEDIAL_CREDITS from the **Query Name** list.
8. Select the radio button of **Insert Message** in the **Processing Mode**.
9. Select the Edit Prompts link.

10. The Query Prompts pagelet displays.
11. Complete the following fields:
    - **Institution**
    - **Aid Year**
    - **Term**
    - **Max Remedial Limit**

12. Select the **OK** button.
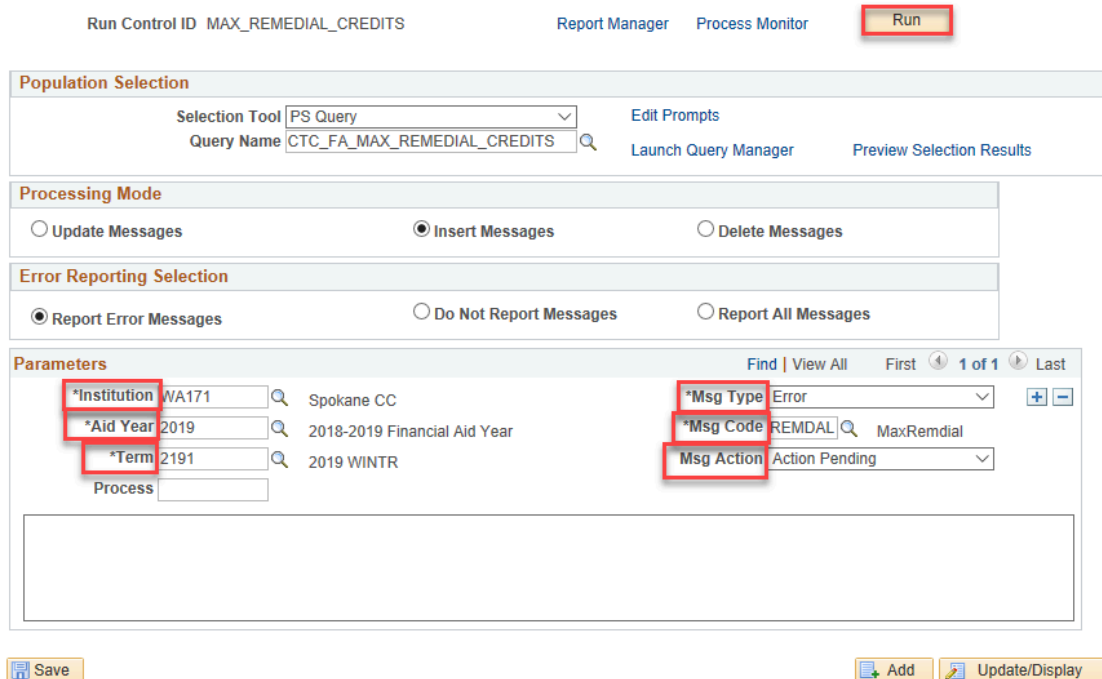

13. The Process User Edit Messages page displays.
14. Enter values for the following fields:
     • **Institution**
     • **Aid Year**
     • **Term**
     • **Msg Type**
     • **Msg Code**
     • **Msg Action**

15. Select the **Run** button.

16. The Process Scheduler Request page displays.

17. Select the **SFA_EDIT_MSG** Process Name and then the **OK** button.

Process Scheduler Request

User ID CTC_KFORSBERG   Run Control ID MAX_REMEDIAL_CREDITS

Server Name	⌄	Run Date	01/24/2019	🗓	
Recurrence	⌄	Run Time	10:47:02AM		Reset to Current Date/Time
Time Zone	🔍				

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	SFA_EDIT_MSG	SFA_EDIT_MSG	Application Engine	Web ⌄	TXT ⌄	Distribution

OK   Cancel

18. The Process User Edit Messages page displays.
19. Select the **Process Monitor** link.
20. The Process Monitor page displays.
21. Select **Refresh** button until the **Run Status** is **Success**.

| Process List | Server List |

View Process Request For

User ID	CTC_KFORSB 🔍	Type	⌄	Last	⌄		1	Days	⌄	Refresh
Server	⌄	Name	🔍	Instance From		Instance To				
Run Status	⌄	Distribution Status	⌄	☑ Save On Refresh						

Process List   Personalize | Find | View All | 🔳 | 🔳   First ◁ 1-5 of 5 ▷ Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	27012895		Application Engine	SFA_EDIT_MSG	CTC_KFORSBERG	01/24/2019 10:47:02AM PST	Success	Posted	Details
☐	27012894		Application Engine	SFA_EDIT_MSG	CTC_KFORSBERG	01/24/2019 10:27:31AM PST	Success	Posted	Details
☐	27012893		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:55:22AM PST	Success	Posted	Details
☐	27012892		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:32:46AM PST	Success	Posted	Details
☐	27012891		Application Engine	SCC_SI_ASSN	CTC_KFORSBERG	01/24/2019 8:38:36AM PST	Success	Posted	Details

Go back to Process User Edit Messages

🖫 Save   📧 Notify

Process List | Server List

22. The process to assign UEM to a student is now complete.

VERIFY MAX REMEDIAL CREDIT REPORT

ℹ️ Confirm whether the Max Remedial Credit report is showing results.

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

- ZD_DS_QUERY_VIEWER

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

Navigation: NavBar > Navigator > Report Tools > Query > Query Viewer

1. The Query Viewer search page displays.
2. Enter **CTC_FA_MAX_REMEDIAL_CREDIT_RPT** into the **Query Name** Field.
3. Select the **Search** button.
4. Select the **HTML** link.

5. The Query page displays.
6. Enter the **Academic Institution**.
7. Enter the **Term**.
8. Select the **View Results** button.

9. The process to run the max remedial credits report is now complete.

Track Continued Student Eligibility for Aid/Exception Report

> ❗ You must have at least one of these local college managed security roles:
>
> • ZZ FA CTC Reports
>
>   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Financial Aid > CTC Custom > CTC Reports > Track Student Eligibility

1. The Track Student Eligibility run control page displays.
2. Enter the **Run Control ID**.
3. Enter the **Institution**.
4. Enter the **Aid Year**.
5. Enter the **Term**.
6. Select the **Run** button.

Track Student Eligibility

Run Control ID TRACK_CONT_STU_ELIG   Report Manager   Process Monitor   Run

Request Parameter(s)

*Institution WA171

*Aid Year 2019

*Term 2191

Save   Add

7. The Process Scheduler Request page displays.
8. Ensure the checkbox is selected for **CTC_SELIG_AE.**
9. Select the **OK** button.

Process Scheduler Request

User ID CTC_KFORSBERG   Run Control ID TRACK_CONT_STU_ELIG

Server Name [_____ ▼]   Run Date 01/24/2019 [📅]

Recurrence [_____ ▼]   Run Time 1:05:15PM   [Reset to Current Date/Time]

Time Zone [_____ 🔍]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Track Student Eligibility	CTC_SELIG_AE	Application Engine	Web ▼	TXT ▼	Distribution

[OK]   [Cancel]

10. The Track Student Eligibility run control page displays.
11. Select the **Process Monitor** Link.
12. Th Process Monitor page displays.
13. On the Process List tab, select the **Refresh** button until the **Run Status** is **Success**.
14. Select the **Go Back to Track Student Eligibility** button at the bottom of the page.

Process List	Server List

View Process Request For

User ID [CTC_KFORSB 🔍] Type [____ ▼] [Last ▼] [____] [1] [Days ▼]   [Refresh]
Server [____ ▼] Name [____ 🔍] Instance From [____] Instance To [____]
Run Status [____ ▼] Distribution Status [____ ▼] ☑ Save On Refresh

Process List   Personalize | Find | View All | 🔲 | 🔳   First ◀ 1-6 of 6 ▶ Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	27012896		Application Engine	CTC_SELIG_AE	CTC_KFORSBERG	01/24/2019 1:05:15PM PST	Success	Posted	Details
☐	27012895		Application Engine	SFA_EDIT_MSG	CTC_KFORSBERG	01/24/2019 10:47:02AM PST	Success	Posted	Details
☐	27012894		Application Engine	SFA_EDIT_MSG	CTC_KFORSBERG	01/24/2019 10:27:31AM PST	Success	Posted	Details
☐	27012893		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:55:22AM PST	Success	Posted	Details
☐	27012892		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:32:46AM PST	Success	Posted	Details
☐	27012891		Application Engine	SCC_SI_ASSN	CTC_KFORSBERG	01/24/2019 8:38:36AM PST	Success	Posted	Details

Go back to Track Student Eligibility

💾 Save   📧 Notify

Process List | Server List

15. The Track Student Eligibility run control page displays.
16. Select the **Report Manager** link.

Track Student Eligibility

Run Control ID TRACK_CONT_STU_ELIG   Report Manager   Process Monitor   Run

Request Parameter(s)

*Institution WA171 🔍

*Aid Year 2019 🔍

*Term 2191 🔍

💾 Save   🔍 Return to Search   ➕ Add

17. The Report Manager page displays.
18. Select the **CTC_E83_RPRT - CTC_E83_RPRT.pdf** link.

| List | Explorer | Administration | Archives |

View Reports For

Folder [_____ ⌄]   Instance [_____] to [_____]   Refresh

Name [_____]   Created On [_____] 🗓 Last [_____ ⌄] [1] Days [⌄]

Reports

Personalize | Find | View All | 🗗 | 📊   First ◀ 1-3 of 3 ▶ Last

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	CTC_E83_RPRT - CTC_E83_RPRT.pdf	CTC_E83_RPRT - CTC_E83_RPRT.PDF	General	01/24/19 1:08PM	1141281	27012896
2	SFA_EDIT_MSG	SFA_EDIT_MSG	General	01/24/19 10:49AM	1141279	27012895
3	SFA_EDIT_MSG	SFA_EDIT_MSG	General	01/24/19 10:31AM	1141278	27012894

Go back to Track Student Eligibility

💾 Save

List | Explorer | Administration | Archives

19. The Report page displays.
20. Select the **CTC_E83_RPRT - CTC_E83_RPRT.pdf** link in the File List section.

Report

Report ID	1141281	Process Instance	27012896	Message Log
Name	XMLP	Process Type	XML Publisher
Run Status	Success		

CTC_E83_RPRT - CTC_E83_RPRT.pdf

Distribution Details

Distribution Node local   Expiration Date 02/23/2019

File List

Name	File Size (bytes)	Datetime Created
CTC_E83_RPRT.pdf	31,878	01/24/2019 1:08:30.322029PM PST
Track_Student_Eligibility_27012896.log	855	01/24/2019 1:08:30.322029PM PST

Distribute To

Distribution ID Type	*Distribution ID
User	CTC_KFORSBERG

21. The report displays.
22. View report results.

Track Continued Student Eligibility for Aid/Exception Report

Institution: WA171
Aid Year: 2019
Term: 2191

Student		Ineligible Plan			Academic Plan Changes			Enrollment Changes		Ineligible Course Work	Max Remedial Credits	
Name	Emplid	Service Indicator Assigned	Indicator Reason Assigned	Ineligible Academic Plan	User Edit Message Assigned	Academic Plan Changed From	Academic Plan Changed to	Service Indicator Assigned	Indicator Reason Assigned	User Edit Message Assigned	User Edit Message Assigned	# of Attempted Remedial Credits
		F04	FIP	Paramedic C45								
		F04	FIP	Nursing Assistant/Aide C01								
		F04	FIP	Nursing Assistant/Aide C01								
		F04	FIP	Professional Tech - Undecided								
		F04	FIP	Paramedic C45								
		F04	FIP	A8 Engine Performance C01								
		F04	FIP	Admin Clerical Assistant								
		F04	FIP	Paramedic C45								
		F04	FIP	Nursing Assistant/Aide C01								
		F04	FIP	Law Enforcement Level 2 C45								
											REMDAL	55
		F04	FIP	A1 Engine Repair C01								
		F04	FIP	Med Office Receptionist C45								

Page **1** of 13

23. The process to run the report to track continued student eligibility for aid/exceptions is now complete.
24. Next we will Release Service Indicator for the ineligible Academic Plan.

Release Service Indicator

> ⚠ You must have at least one of these local college managed security roles:
>
> • ZD CC Service Indicate Student
> • ZZ CC Service Indicate Student
>
> If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Campus Community > Service Indicators (Student) > Mass Release

1. The Mass Release run control search page displays.
2. Select the **Add a New Value** tab.
3. Enter a **Run Control ID**.
4. Select **Add** button.
5. The Mass Release page displays.
6. Select the **Selection Tool** field and choose **PS QUERY** from the list.
7. Select **CTC_FA_INELIG_PLAN_SI_RELEASE** in the **Query Name** Field.
8. Enter the **Institution** field.

Mass Release

Run Control ID INELG_PLAN_SI_RELEASE	Report Manager	Process Monitor	Run

Population Selection

Selection Tool PS Query   Edit Prompts
Query Name CTC_FA_INELIG_PLAN_SI_RELEASE 🔍   Launch Query Manager   Preview Selection Results

Service Indicator Data

*Institution Spokane CC
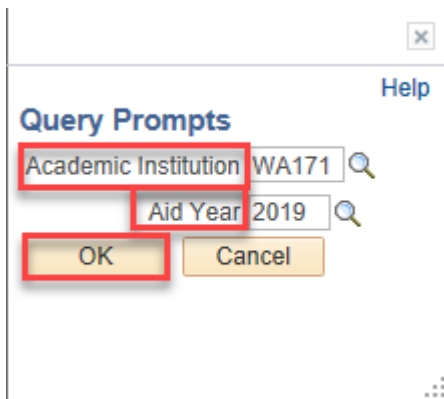*Service Indicator Code ☐ 🔍
*Reason ☐ 🔍

Effective Period

Start Term ☐ 🔍   End Term ☐ 🔍
Start Date ☐ 📅   End Date ☐ 📅

🖫 Save   🖹 Notify   ➕ Add   ✎ Update/Display

9. The Query Prompts pagelet displays.
10. Select the **Edit Prompts** link.
    • Enter the **Academic Institution**.
    • Enter the **Aid Year**.
    • Enter the **Term**.

11. Select the **OK** button.

12. The Mass Release page displays.
13. Select the **Service Indicator Code**.
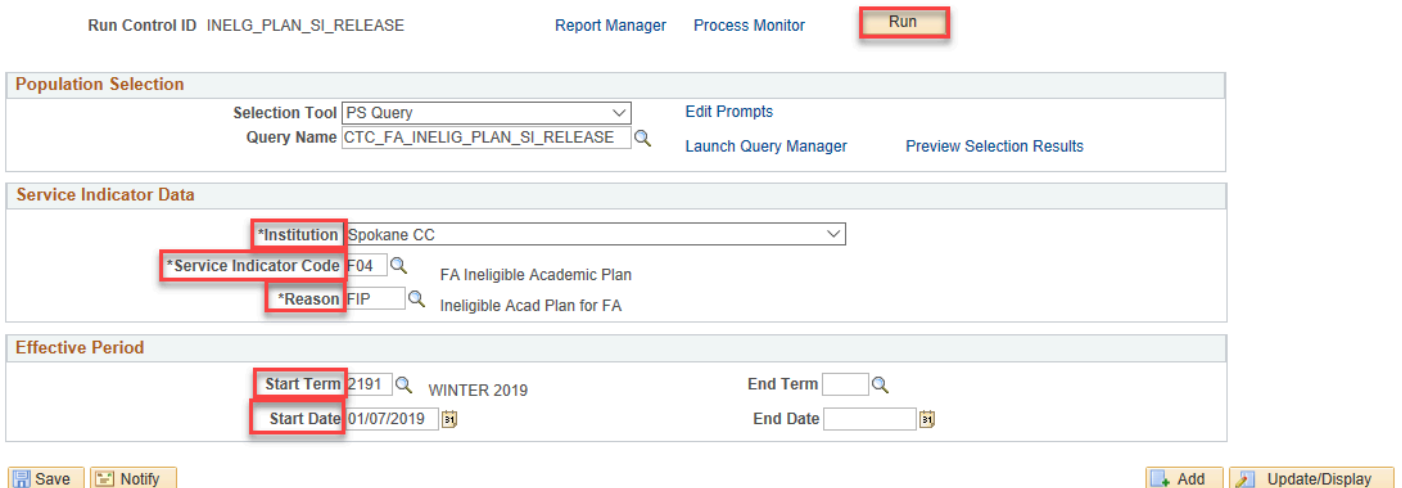14. Select the **Reason**.
15. Select the **Start Term**.
16. Select the **Start Date**.
17. Select the **Run** button.

18. The Process Scheduler Request page displays.
19. Select the **SCC_SI_RELS** Process and then the **OK** button.

Process Scheduler Request

User ID CTC_KFORSBERG   Run Control ID INELG_PLAN_SI_RELEASE

Server Name [_____ ▽]   Run Date 01/24/2019   [📅]
Recurrence [_____ ▽]   Run Time 1:29:35PM   [Reset to Current Date/Time]
Time Zone [_____] 🔍

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☐	Publish REL Service Ind	EIPSIRLS	PSJob	(None) ▽	(None) ▽	Distribution
☑	SCC_SI_RELS	SCC_SI_RELS	Application Engine	Web ▽	TXT ▽	Distribution

[OK]   [Cancel]

20. The Mass Release page displays.
21. Select the **Process Monitor** link.
22. The Process Monitor page displays.
23. Select the **Refresh** button until the **Run Status** is **Success**.

[Process List] [Server List]

View Process Request For

User ID [CTC_KFORSB] 🔍   Type [_____ ▽] [Last ▽]   [_____] [1] [Days ▽]   [Refresh]
Server [_____ ▽]   Name [_____] 🔍   Instance From [_____]   Instance To [_____]
Run Status [_____ ▽]   Distribution Status [_____ ▽]   ☑ Save On Refresh

Process List   Personalize | Find | View All | ⧉ | 🏿   First ◁ 1-7 of 7 ▷ Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	27012897		Application Engine	SCC_SI_RELS	CTC_KFORSBERG	01/24/2019 1:29:35PM PST	Success	Posted	Details
☐	27012896		Application Engine	CTC_SELIG_AE	CTC_KFORSBERG	01/24/2019 1:05:15PM PST	Success	Posted	Details
☐	27012895		Application Engine	SFA_EDIT_MSG	CTC_KFORSBERG	01/24/2019 10:47:02AM PST	Success	Posted	Details
☐	27012894		Application Engine	SFA_EDIT_MSG	CTC_KFORSBERG	01/24/2019 10:27:31AM PST	Success	Posted	Details
☐	27012893		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:55:22AM PST	Success	Posted	Details
☐	27012892		Application Engine	3CENGINE	CTC_KFORSBERG	01/24/2019 9:32:46AM PST	Success	Posted	Details
☐	27012891		Application Engine	SCC_SI_ASSN	CTC_KFORSBERG	01/24/2019 8:38:36AM PST	Success	Posted	Details

Go back to Mass Release

💾 Save   📧 Notify

Process List | Server List

24. You have now completed the Track Continued Student Eligibility for Aid Reports.
25. End of procedures.