

<b>Version</b>	1.0
<b>Document Generation Date</b>	4/22/2008
<b>Date Modified</b>	4/22/2008
<b>Last Changed by</b>	ASDS
<b>Status</b>	Draft

## Auto Packaging

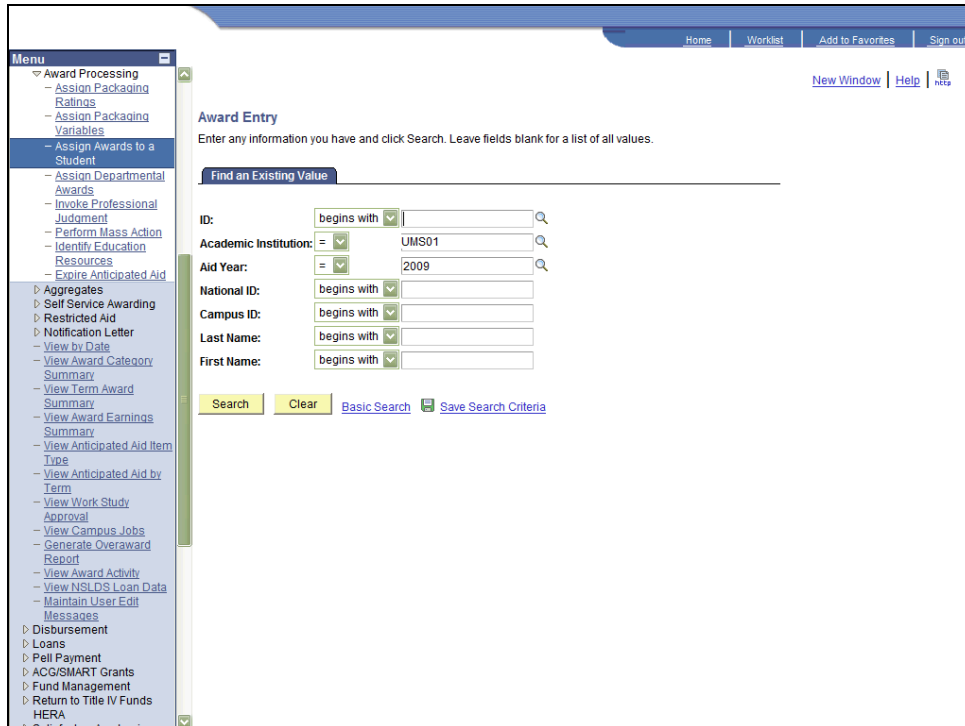
### Concept

**Auto Packaging** assigns awards to an individual student based on the rules of the selected packaging plan. To use the **Student Aid Package** page for Auto Packaging, you need established packaging plans.

When you Auto Package a student, the process assigns awards based on the selected packaging plan and validates all awards. Validation checks eligibility, packaging or financial aid item type rules for minimum and maximum award limits, aggregate limits, fiscal fund availability, and federal eligibility. Validation may reduce an award amount or set an award amount to zero to comply with rules and limits. After Auto Packaging, if you make no changes to the awards, you can post the awards to the award tables directly. If you do make manual changes after you Auto Package, validate all the awards (using the **Validate** button) to ensure the student is still eligible.

## Procedure

Step	Action
1.	Navigate: <b>Financial Aid &gt; Awards &gt; Award Processing &gt; Assign Awards to a Student.</b>



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

Find an Existing Value

ID:

Academic Institution:

Aid Year:

National ID:

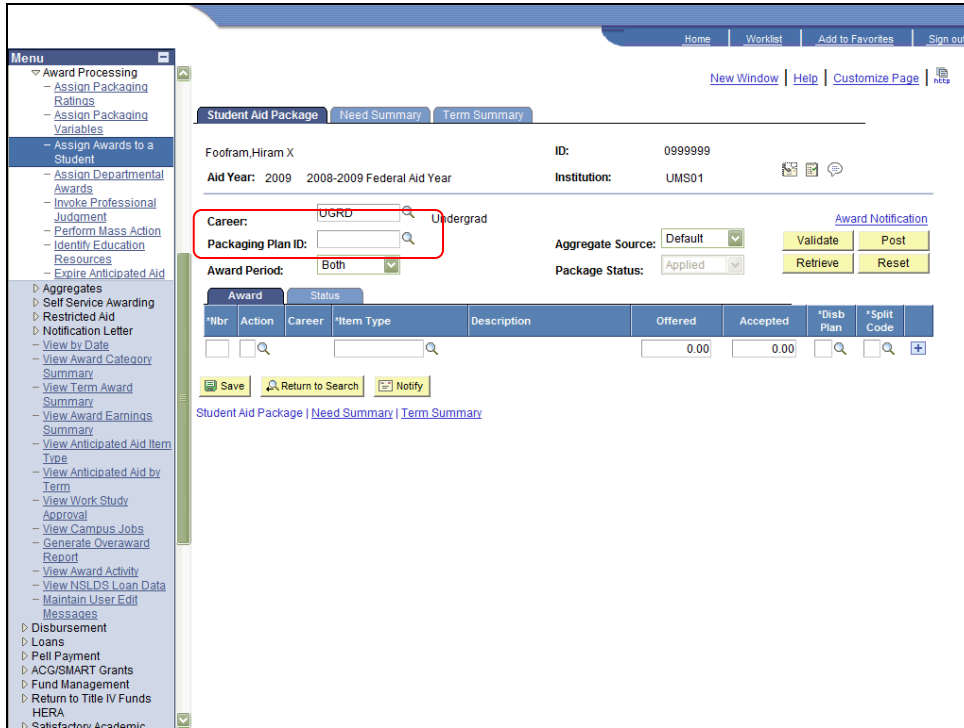
Campus ID:

Last Name:

First Name:

[Basic Search](#)

Step	Action
2.	Make sure the correct <b>Institution</b> and <b>Aid Year</b> are entered. Enter search criteria to identify the student. For example, enter the student's ID in the <b>ID</b> field.
3.	Click the <b>Search</b> button. <input type="button" value="Search"/>



Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | nts

Student Aid Package | Need Summary | Term Summary

Footram, Hiram X ID: 0999999  
 Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS01

Career: UGRD Undergrad  
 Packaging Plan ID:

Award Period: Both

Aggregate Source: Default Validate Post  
 Package Status: Applied Retrieve Reset

Award	Status	*Nbr	Action	Career	*Item Type	Description	Offered	Accepted	*Dist Plan	*Split Code
							0.00	0.00		

Save Return to Search Notify


Student Aid Package | Need Summary | Term Summary

Step	Action
4.	The difference between manual awarding and auto packaging a student is in the use of a packaging plan. Use the look up to select a <b>Packaging Plan ID</b> .

# Process Document

## Financial Aid: Auto Packaging-042208

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | 

**Menu**

- ▼ Award Processing
  - ▼ Assign Packaging Ratings
  - ▼ Assign Packaging Variables
  - ▼ Assign Awards to a Student
  - ▼ Assign Departmental Awards
  - ▼ Invoke Professional Judgment
  - ▼ Perform Mass Action
  - ▼ Identify Education Resources
  - ▼ Expire Anticipated Aid
- ▶ Aggregates
- ▶ Self Service Awarding
- ▶ Restricted Aid
- ▶ Notification Letter
  - ▼ View by Date
  - ▼ View Award Category Summary
  - ▼ View Term Award Summary
  - ▼ View Award Earnings Summary
  - ▼ View Anticipated Aid Item Type
  - ▼ View Anticipated Aid by Term
  - ▼ View Work Study Approval
  - ▼ View Campus Jobs
  - ▼ Generate Overaward Report
  - ▼ View Award Activity
  - ▼ View NSLDS Loan Data
  - ▼ Maintain User Edit
  - Messages
  - ▶ Disbursement
  - ▶ Loans
  - ▶ Pell Payment
  - ▶ ACG/SMART Grants
  - ▶ Fund Management
  - ▶ Return to Title IV Funds
  - HERA
  - ▶ Satisfactory Academic

**Look Up Packaging Plan ID**

Academic Institution: UMS01  
 Aid Year: 2009  
 Academic Career: UGRD  
 Packaging Plan ID: begins with   
 Description: begins with

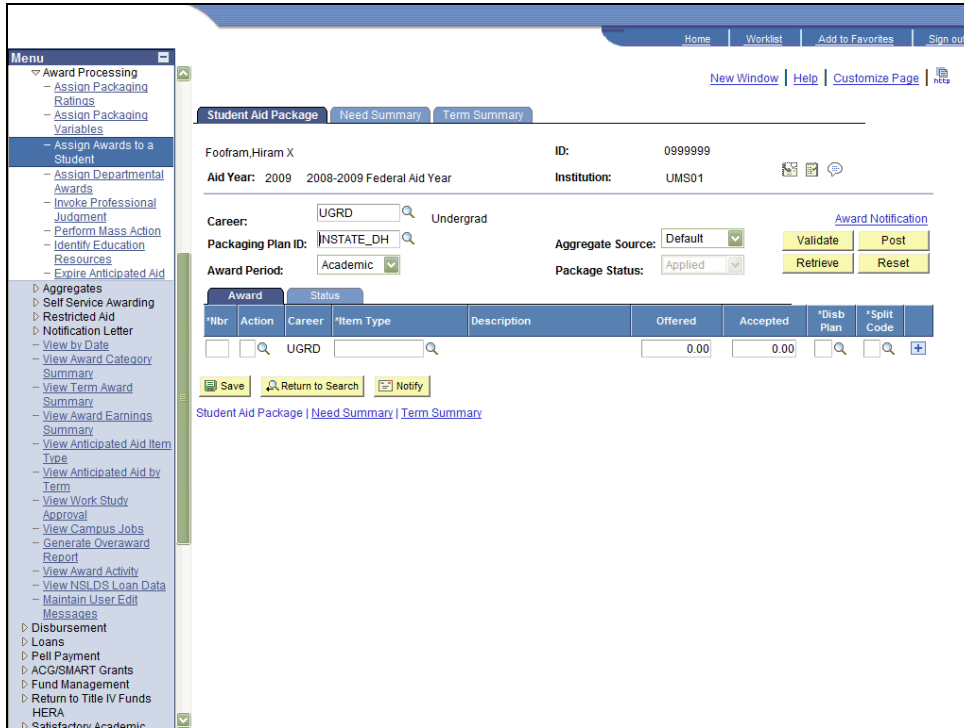
[Basic Lookup](#)

**Search Results**

View All | First | 1-8 of 8 | Last

Packaging Plan ID	Description
IN STATE	UG Resident
IN ST_SUM	UG Res Summer
INSTATE_DH	UG Resident
NEBHE	UG NEBHE
NEBHE_SUM	UG NEBHE Summer
OUT_STATE	UG Nonresident
OUT_ST_SUM	UG Nonres Summer
UGRD_ACAD	UG Full Time

Step	Action
5.	Select a Packaging Plan for this student.



Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | nts

Student Aid Package | Need Summary | Term Summary

Footram, Hiram X ID: 0999999

Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS01

Career: UGRD Undergrad Award Notification


Packaging Plan ID: INSTATE\_DH Aggregate Source: Default Validate Post

Award Period: Academic Package Status: Applied Retrieve Reset

Award		Status							
*Nbr	Action	Career	*Item Type	Description	Offered	Accepted	*Dist Plan	*Split Code	
	UGRD				0.00	0.00			

Save Return to Search Notify

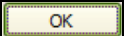
Student Aid Package | Need Summary | Term Summary

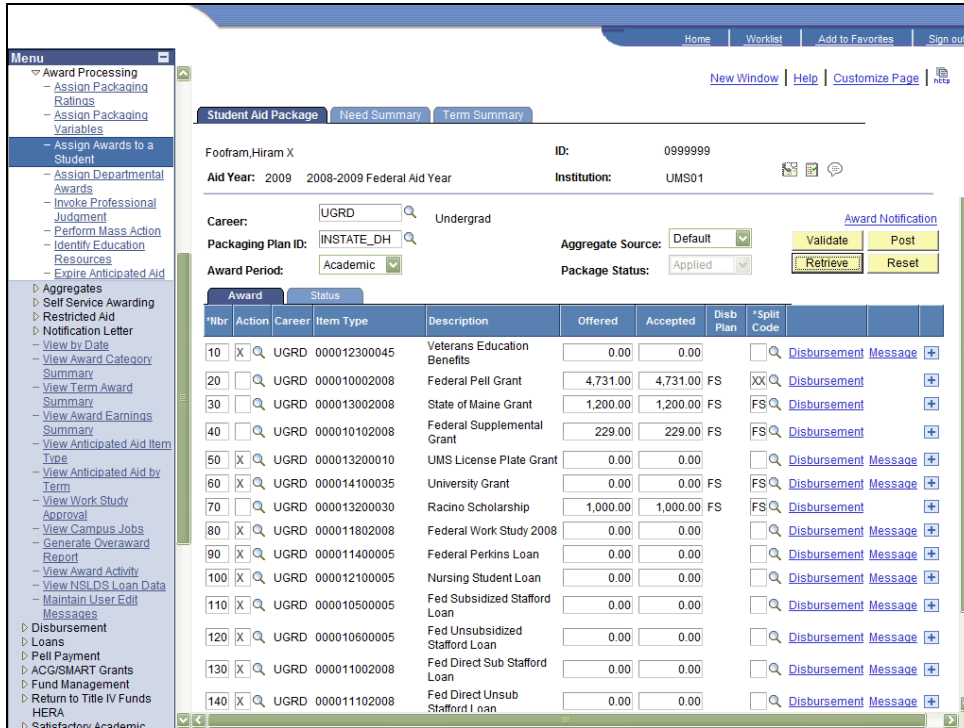
Step	Action
6.	Click the <b>Retrieve</b> button to apply the selected packaging plan. 

# Process Document

## Financial Aid: Auto Packaging-042208

The screenshot shows the 'Award Processing' interface for a student named Hiram X. A confirmation dialog box is displayed over the main table, stating: 'Award Validation completed successfully. Please review each award message. (14420,57) The award amount may have been adjusted as a result of the validation process.' The dialog has an 'OK' button. The background interface shows a table of awards with columns for 'Nbr', 'Acti', 'Status', 'Disb', and '\*Split Code'. The table lists various aid types such as 'UMS License Plate Grant', 'University Grant', 'Racino Scholarship', 'Federal Work Study 2008', 'Federal Perkins Loan', 'Nursing Student Loan', 'Fed Subsidized Stafford Loan', 'Fed Unsubsidized Stafford Loan', and 'Fed Direct Sub Stafford Loan'.

Step	Action
7.	The packaging plan rules are applied and validated. Click <b>OK</b> to acknowledge the confirmation message. <div style="text-align: center; margin-top: 10px;">  </div>



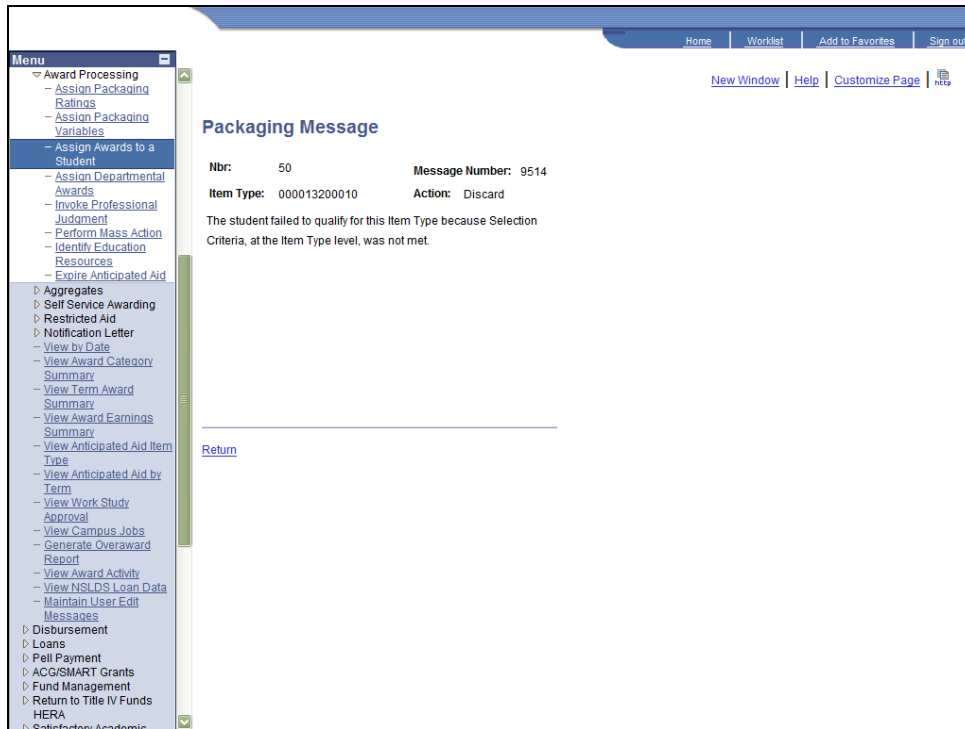
The screenshot shows the 'Student Aid Package' interface for student Hiram X. The table below represents the data shown in the 'Award' tab of the interface.

#	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	Disbursement	Message
10	X	UGRD	000012300045	Veterans Education Benefits	0.00	0.00				
20		UGRD	000010002008	Federal Pell Grant	4,731.00	4,731.00	FS	XX		
30		UGRD	000013002008	State of Maine Grant	1,200.00	1,200.00	FS	FS		
40		UGRD	000010102008	Federal Supplemental Grant	229.00	229.00	FS	FS		
50	X	UGRD	000013200010	UMS License Plate Grant	0.00	0.00				
60	X	UGRD	000014100035	University Grant	0.00	0.00	FS	FS		
70		UGRD	000013200030	Racino Scholarship	1,000.00	1,000.00	FS	FS		
80	X	UGRD	000011802008	Federal Work Study 2008	0.00	0.00				
90	X	UGRD	000011400005	Federal Perkins Loan	0.00	0.00				
100	X	UGRD	000012100005	Nursing Student Loan	0.00	0.00				
110	X	UGRD	000010500005	Fed Subsidized Stafford Loan	0.00	0.00				
120	X	UGRD	000010600005	Fed Unsubsidized Stafford Loan	0.00	0.00				
130	X	UGRD	000011002008	Fed Direct Sub Stafford Loan	0.00	0.00				
140	X	UGRD	000011102008	Fed Direct Unsub Stafford Loan	0.00	0.00				

Step	Action
8.	To see why certain items in the packaging plan were discarded (have "X" in the Action field) and zero dollar amount for this student, you can click the <b>Message</b> link for those items. <a href="#">Message</a>

# Process Document

## Financial Aid: Auto Packaging-042208



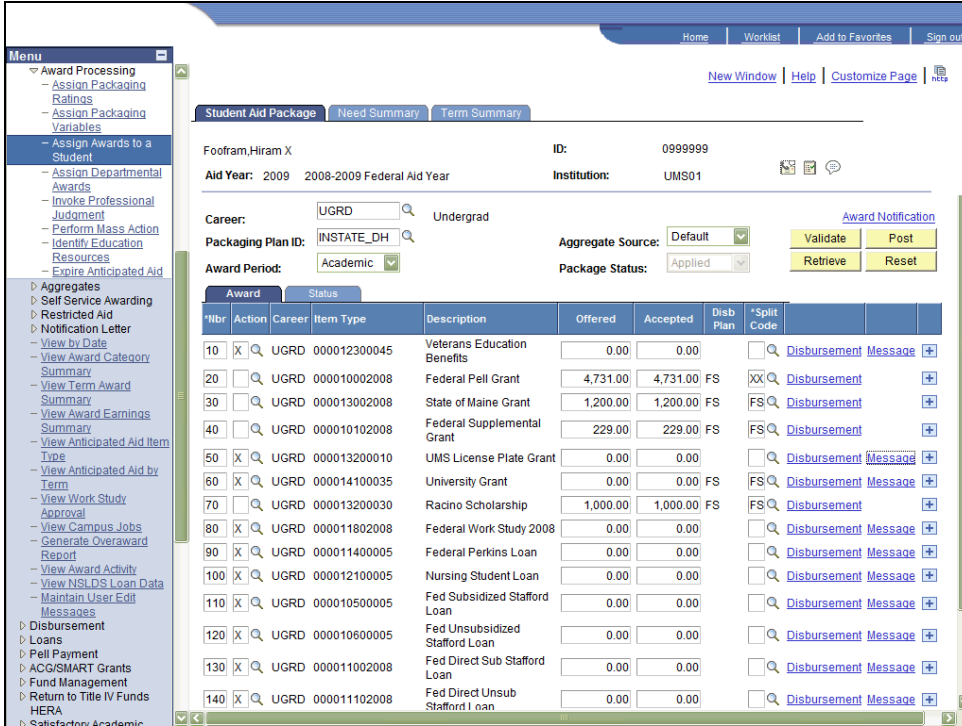
**Packaging Message**

Nbr: 50      Message Number: 9514  
 Item Type: 000013200010      Action: Discard

The student failed to qualify for this Item Type because Selection Criteria, at the Item Type level, was not met.

[Return](#)

Step	Action
9.	Click <b>Return</b> to return to the Student Aid Package page. <a href="#">Return</a>



Student Aid Package | Need Summary | Term Summary

Footram, Hiram X | ID: 0999999 | Institution: UMS01

Aid Year: 2009 | 2008-2009 Federal Aid Year

Career: UGRD | Undergrad

Packaging Plan ID: INSTATE\_DH | Academic

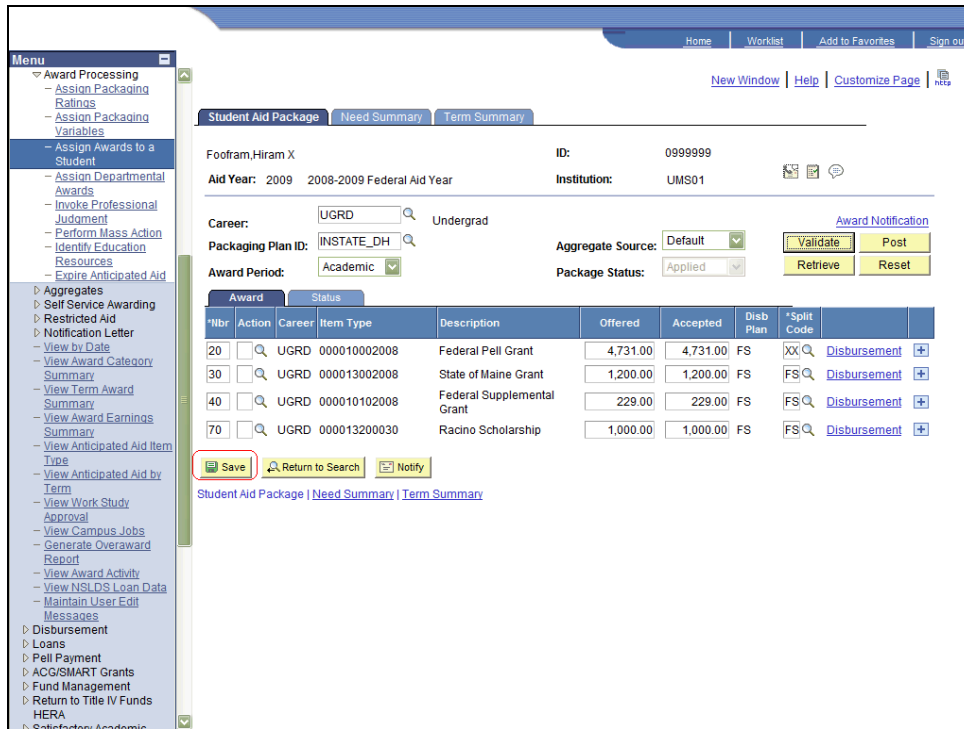
Aggregate Source: Default | Package Status: Applied


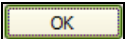
Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	
10	X	UGRD	000012300045	Veterans Education Benefits	0.00	0.00			Disbursement Message
20		UGRD	000010002008	Federal Pell Grant	4,731.00	4,731.00	FS	XX	Disbursement
30		UGRD	000013002008	State of Maine Grant	1,200.00	1,200.00	FS	FS	Disbursement
40		UGRD	000010102008	Federal Supplemental Grant	229.00	229.00	FS	FS	Disbursement
50	X	UGRD	000013200010	UMS License Plate Grant	0.00	0.00			Disbursement Message
60	X	UGRD	000014100035	University Grant	0.00	0.00	FS	FS	Disbursement Message
70		UGRD	000013200030	Racino Scholarship	1,000.00	1,000.00	FS	FS	Disbursement
80	X	UGRD	000011802008	Federal Work Study 2008	0.00	0.00			Disbursement Message
90	X	UGRD	000011400005	Federal Perkins Loan	0.00	0.00			Disbursement Message
100	X	UGRD	000012100005	Nursing Student Loan	0.00	0.00			Disbursement Message
110	X	UGRD	000010500005	Fed Subsidized Stafford Loan	0.00	0.00			Disbursement Message
120	X	UGRD	000010600005	Fed Unsubsidized Stafford Loan	0.00	0.00			Disbursement Message
130	X	UGRD	000011002008	Fed Direct Sub Stafford Loan	0.00	0.00			Disbursement Message
140	X	UGRD	000011102008	Fed Direct Unsub Stafford Loan	0.00	0.00			Disbursement Message

Step	Action
10.	<p>If you make any adjustments or additional awards, you must click the <b>Validate</b> button. Clicking <b>Validate</b> will also remove the award rows for awards that were discarded (have an "X" Action code and zero dollar amount).</p> <p>If you did not make any adjustments just click <b>Post</b>. Posting will also remove the award rows for awards that were discarded.</p>

# Process Document

## Financial Aid: Auto Packaging-042208



Step	Action
11.	Click <b>Post</b> . 
12.	Click <b>OK</b> in the posting confirmation dialog box. 
13.	<b>End of Procedure.</b>