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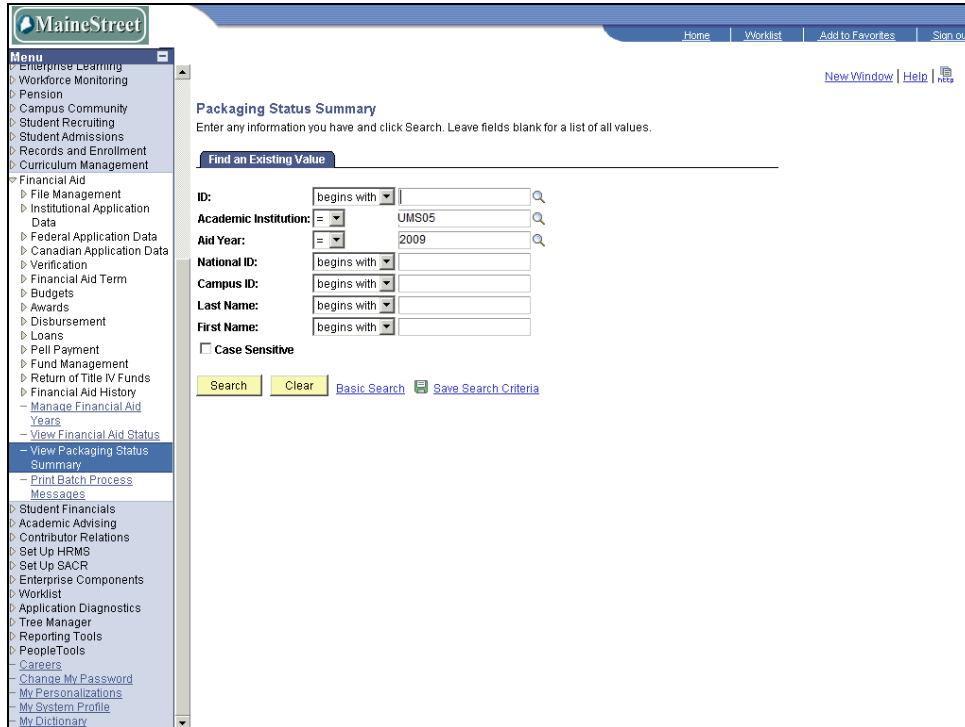
Packaging Status Summary

Concept

The **Financial Aid Status** page summarizes much of the information used in **Packaging** and other financial aid processes. It includes data such as federal and institutional verification status, disbursement hold, satisfactory academic progress, and packaging information. This page also provides links to access other pages to view ISIR and term information, database matches, student cost of attendance and need, and Pell information.

Procedure

Step	Action
1.	Navigate: Financial Aid > View Packaging Status Summary.

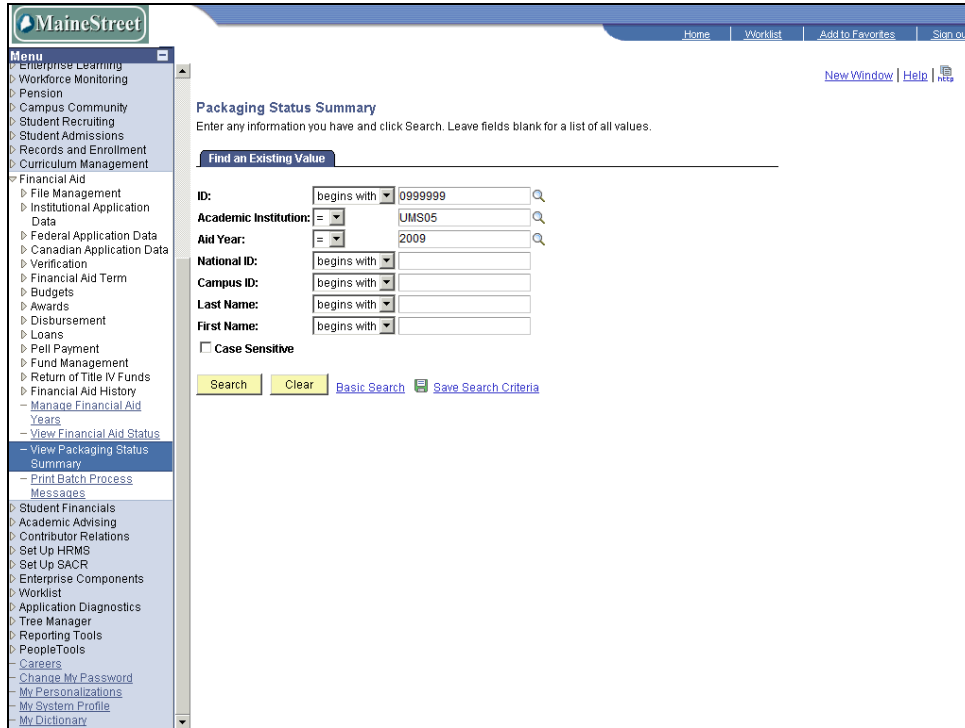


The screenshot shows the 'Packaging Status Summary' page in the MaineStreet system. The left-hand navigation menu is expanded to show 'Financial Aid' > 'View Packaging Status Summary'. The main content area contains a search form with the following fields:


- ID:** begins with []
- Academic Institution:** [] UMS05
- Aid Year:** [] 2009
- National ID:** begins with []
- Campus ID:** begins with []
- Last Name:** begins with []
- First Name:** begins with []

Below the fields are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A 'Find an Existing Value' button is also present at the top of the search area.

Step	Action
2.	<p>Make sure the correct Institution and Aid Year are entered.</p> <p>Enter information to search for the student. For example, enter the student's ID in the ID field, or name in the name fields.</p>



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Enterprise Learning', 'Workforce Monitoring', 'Pension', 'Campus Community', 'Student Recruiting', 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', 'Financial Aid', 'File Management', 'Institutional Application Data', 'Federal Application Data', 'Canadian Application Data', 'Verification', 'Financial Aid Term', 'Budgets', 'Awards', 'Disbursement', 'Loans', 'Pell Payment', 'Fund Management', 'Return of Title IV Funds', 'Financial Aid History', 'Manage Financial Aid Years', 'View Financial Aid Status', 'View Packaging Status Summary', 'Print Batch Process', 'Messages', 'Student Financials', 'Academic Advising', 'Contributor Relations', 'Set Up HRMS', 'Set Up SACR', 'Enterprise Components', 'Worklist', 'Application Diagnostics', 'Tree Manager', 'Reporting Tools', 'People Tools', 'Careers', 'Change My Password', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area is titled 'Packaging Status Summary' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' section with search criteria: ID (begins with 0999999), Academic Institution (UJMS05), Aid Year (2009), National ID (begins with), Campus ID (begins with), Last Name (begins with), and First Name (begins with). There is a 'Case Sensitive' checkbox and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step	Action
3.	Click the Search button. 
4.	The student's EFC Status represents data from the financial aid application. The status can be <i>Official</i> , <i>Rejected</i> , or <i>Unofficial</i> .
5.	The Counselor field is optional and informational only - use it to store the emplid of the financial aid counselor for this student.

Process Document

Financial Aid: Packaging Status Summary-041808



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Financial Aid Status

Hiram Footram ID: 0999999

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: UMS05

EFC Status: Unofficial [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Aid Processing Status: Applied [Award Notification](#)

Aid Application Status: Active *Aid Packaging Method: Not Pkgd Disbursement Hold:

Scholarship Status: Not Eval Academic Career: UGRD Undergraduate

Review Status: Incomplete Packaging Plan ID:

INST Verification Status: Non Select Aggregate Source: Default Aggregate Used:

Verification Flag: Not Reqd *Satisfactory Academic Progress: Undetermine [SAP Details](#)

Verification Status: Not Select Loan Entrance Interview Status: Exit Interview:

Self-Service

Award Access: Denied Inquiry Access

Step	Action
6.	The Aid Processing Status field indicates where the student is in the awarding process. The values are as follows: Applied - an ISIR has been loaded for the student, No Electronic Application - no ISIR has been loaded, but the student has been aid year activated, Packaging Completed - the student's award package has been posted, Ready for Counselor Review - manually set to indicate counselor should review, Ready for Packaging - the student is ready for packaging. This status can be used when selecting students for mass packaging.
7.	The Aid Application Status field automatically has value Active if an ISIR has been loaded. You can manually select values Canceled or Restricted . If you set this field to Canceled, the student will not be evaluated for Ready to Package and selected for mass packaging.
8.	Scholarship Status , Review Status and INST Verification Status fields are manually set and can be used by the Institution as desired.

Step	Action
9.	<p>The Verification Flag is automatically set to <i>Select</i> if the student's ISIR has been selected for federal verification.</p> <p>The Verification Status field is updated during the verification process.</p>
10.	<p>The Aid Packaging Method field is initially set to <i>Not Pkgd.</i> It is automatically set to <i>Auto</i> if auto packaging is used, and to <i>Counselor</i> if manual packaging is used.</p>
11.	<p>Academic Career comes from FA Term. The Packaging Plan ID is set when the student is auto or mass packaged.</p> <p>The Aggregate Source is set to <i>Default</i>, which means it is set to whatever value was selected in the installation of financial aid.</p> <p>Satisfactory Academic Progress is set by the SAP procedure. You can manually set it here by clicking the SAP Details link.</p> <p>The Loan Entrance Interview Status and Exit Interview fields can be set manually.</p> <p>The Disbursement Hold field is manually set. The values are blank (no hold), <i>Fed Aid</i>, <i>Institut.</i>, and <i>Loan Hold</i>.</p> <p>The Award Notification link is not used.</p>

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Financial Aid: Packaging Status Summary-041808



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Financial Aid Status

Hiram Footram ID: 0999999

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: UMS05

EFC Status: Unofficial [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Aid Processing Status: [Award Notification](#)

Aid Application Status: *Aid Packaging Method: Disbursement Hold:

Scholarship Status: Academic Career: Undergraduate

Review Status: Packaging Plan ID:

INST Verification Status: Aggregate Source: Aggregate Used:

Verification Flag: *Satisfactory Academic Progress: [SAP Details](#)

Verification Status: Loan Entrance Interview Status: Exit Interview:

Self-Service

Award Access: Inquiry Access

Step	Action
12.	Click the TERM link.



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Enterprise Learning', 'Financial Aid', and 'Messages'. The main content area is titled 'Financial Aid Status' and contains a 'Term Information' section. This section displays a table of student information for the 2009 term.

Term Information	
Term: 0910	2008 Fall
Status: Active	Effective Date: 04/09/2008
Career: Undergraduate	Residency: In-State Resident
Primary Program: Fine Arts Undergraduate	NSLDS Loan Year: 3rd Year
Academic Plan: Art History (BFA)	Financial Aid Load: Enrolled Full-Time
Sub-Plan:	Academic Load: Enrolled Full-Time
Academic Year: 2009	Approved Academic Load: Full-Time
FA Standing:	Academic Level: Junior
Withdrawal/Cancel:	Admit Term: 2002 Fall
W/C Reason:	Expected Graduation Term:
W/C Date:	Expected Grad Date:

Below the table is a blue 'Return' link.

Step	Action
13.	Use the Financial Aid Status Term Information page to view the student's term, career, and other term information.
14.	Click the Return link. Return

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Financial Aid: Packaging Status Summary-041808



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Financial Aid Status

Hiram Footram ID: 0999999

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: UMS05

EFC Status: Unofficial [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Aid Processing Status: Applied [Award Notification](#)

Aid Application Status: Active *Aid Packaging Method: Not Pkgd Disbursement Hold:

Scholarship Status: Not Eval Academic Career: UGRD Undergraduate

Review Status: Incomplete Packaging Plan ID:

INST Verification Status: Non Select Aggregate Source: Default Aggregate Used:

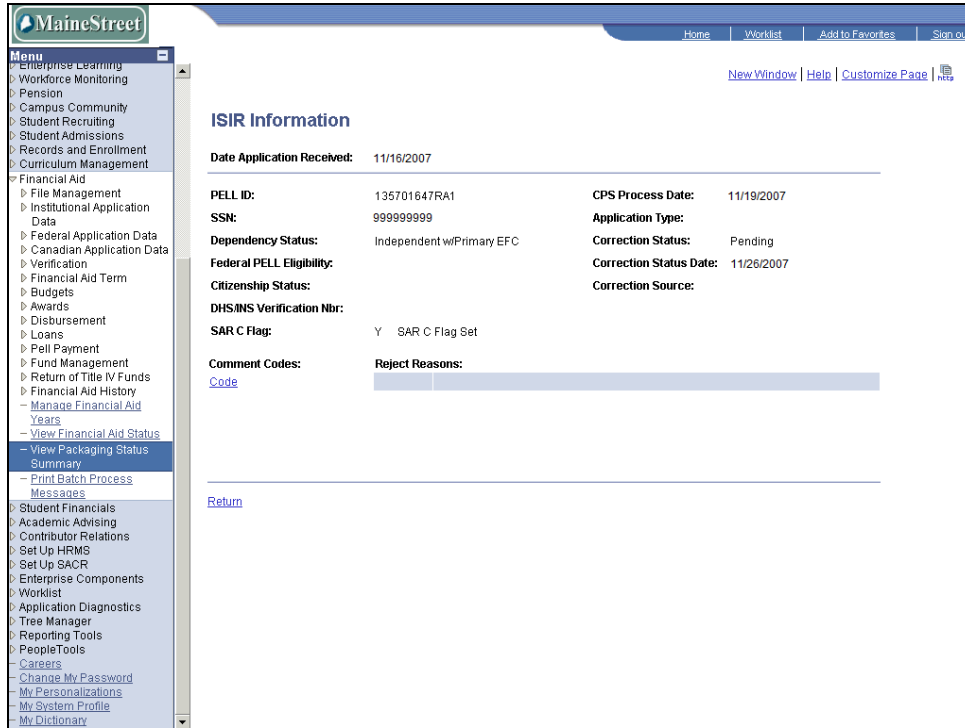
Verification Flag: Not Reqd *Satisfactory Academic Progress: Undetrmine [SAP Details](#)

Verification Status: Not Select Loan Entrance Interview Status: Exit Interview:

Self-Service

Award Access: Denied Inquiry Access

Step	Action
15.	Click the ISIR Information link.



ISIR Information

Date Application Received: 11/16/2007

PELL ID: 135701647RA1 CPS Process Date: 11/19/2007

SSN: 999999999 Application Type:

Dependency Status: Independent w/Primary EFC Correction Status: Pending

Federal PELL Eligibility: Correction Status Date: 11/26/2007

Citizenship Status: Correction Source:

DHS/INS Verification Nbr:

SAR C Flag: Y SAR C Flag Set

Comment Codes: Reject Reasons:

[Code](#)

[Return](#)

Step	Action
16.	Use the ISIR Information page to view information from the student's most recently loaded ISIR and information from Campus Community.
17.	Click the Return link. Return

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Financial Aid: Packaging Status Summary-041808



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Financial Aid Status

Hiram Footram ID: 0999999

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EFC Status: Unofficial [TERM](#) [SIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Aid Processing Status: Applied [Award Notification](#)

Aid Application Status: Active *Aid Packaging Method: Not Pkgd Disbursement Hold:

Scholarship Status: Not Eval Academic Career: UGRD Undergraduate

Review Status: Incomplete Packaging Plan ID:

INST Verification Status: Non Select Aggregate Source: Default Aggregate Used:


Verification Flag: Not Reqd *Satisfactory Academic Progress: Undetermine [SAP Details](#)

Verification Status: Not Select Loan Entrance Interview Status: Exit Interview:

Self-Service

Award Access: Denied Inquiry Access

Step	Action
18.	Click the Database Matches link. Database Matches



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Database Matches

Match Values	Override
SSN Match: Match	<input type="checkbox"/>
SSA Citizenship Indicator: U.S. Citiz	<input type="checkbox"/>
DHS/INS Match:	<input type="checkbox"/>
Sec DHS/INS Match Flag:	<input type="checkbox"/>
VA Match:	<input type="checkbox"/>
Selective Service Match: Reg Conf	<input type="checkbox"/>
Selective Service Registration:	<input type="checkbox"/>
NSLDS Match: Eligible	<input type="checkbox"/>
Prisoner Match:	<input type="checkbox"/>
Drug Offense Conviction: Eligible	<input type="checkbox"/>
Father's SSN Match:	<input type="checkbox"/>
Mother's SSN Match:	<input type="checkbox"/>

PLUS Override HEAL Eligible
 Title IV Fund Eligibility PreProfessional Coursework

OK Cancel

Step	Action
19.	Use the Database Matches page to review or manually override a student's status for the U.S.E.D. federally required database matches (populated by the ISIR data load process).

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Financial Aid: Packaging Status Summary-041808



Match Values	Override
SSN Match: Match	<input type="checkbox"/>
SSA Citizenship Indicator: U.S. Citiz.	<input type="checkbox"/>
DHS/INS Match:	<input type="checkbox"/>
Sec DHS/INS Match Flag:	<input type="checkbox"/>
VA Match:	<input type="checkbox"/>
Selective Service Match: Reg Conf	<input type="checkbox"/>
Selective Service Registration:	<input type="checkbox"/>
NSLDS Match: Eligible	<input type="checkbox"/>
Prisoner Match:	<input type="checkbox"/>
Drug Offense Conviction: Eligible	<input type="checkbox"/>
Father's SSN Match:	<input type="checkbox"/>
Mother's SSN Match:	<input type="checkbox"/>

PLUS Override HEAL Eligible
 Title IV Fund Eligibility PreProfessional Coursework

OK Cancel

Step	Action
20.	You can select the Override check box next to a database match value to override the federally reported match value.
21.	Select the PLUS Override check box to define those dependent undergraduates who are eligible for additional Unsubsidized Stafford Loan funds because their parents are deemed a credit risk or for professional judgement reasons. By selecting this check box, the packaging process does not award a PLUS loan and allows a dependent undergraduate student to become eligible for additional Unsubsidized Stafford Loan funds.
22.	Select the HEAL Eligible check box to increase Stafford loan limits for eligible health professional candidates.
23.	Select the Title IV Fund Eligibility check box to identify students who are eligible for Title IV funds. If you clear the check box, the system does not award federal aid to the student.



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Menu

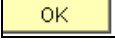
- Enterprise Learning
- Workforce Monitoring
- Pension
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
 - File Management
 - Institutional Application Data
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- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
 - Careers
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Database Matches

Match Values	Override
SSN Match: Match	<input type="checkbox"/>
SSA Citizenship Indicator: U.S. Citiz.	<input type="checkbox"/>
DHS/INS Match:	<input type="checkbox"/>
Sec DHS/INS Match Flag:	<input type="checkbox"/>
VA Match:	<input type="checkbox"/>
Selective Service Match: Reg Conf	<input type="checkbox"/>
Selective Service Registration:	<input type="checkbox"/>
NSLDS Match: Eligible	<input type="checkbox"/>
Prisoner Match:	<input type="checkbox"/>
Drug Offense Conviction: Eligible	<input type="checkbox"/>
Father's SSN Match:	<input type="checkbox"/>
Mother's SSN Match:	<input type="checkbox"/>

PLUS Override HEAL Eligible
 Title IV Fund Eligibility PreProfessional Coursework

OK Cancel

Step	Action
24.	Click the OK button. 

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Financial Aid: Packaging Status Summary-041808



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Financial Aid Status

Hiram Footram ID: 0999999

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: UMS05

EFC Status: Unofficial [TERM](#) [SIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Aid Processing Status: Applied [Award Notification](#)

Aid Application Status: Active *Aid Packaging Method: Not Pkgd Disbursement Hold:

Scholarship Status: Not Eval Academic Career: UGRD Undergraduate

Review Status: Incomplete Packaging Plan ID:

INST Verification Status: Non Select Aggregate Source: Default Aggregate Used:

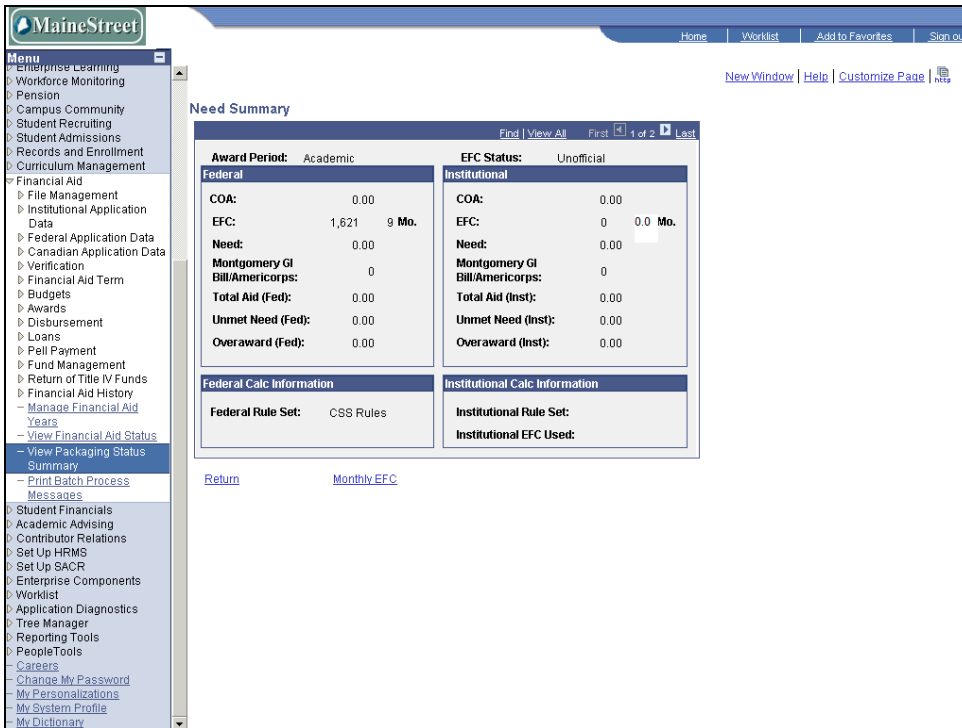
Verification Flag: Not Reqd *Satisfactory Academic Progress: Undetrmine [SAP Details](#)

Verification Status: Not Select Loan Entrance Interview Status: Exit Interview:

Self-Service

Award Access: Denied Inquiry Access

Step	Action
25.	Click the Need Summary link.



Need Summary

Award Period: Academic EFC Status: Unofficial

Federal		Institutional	
COA:	0.00	COA:	0.00
EFC:	1,621 9 Mo.	EFC:	0 0.0 Mo.
Need:	0.00	Need:	0.00
Montgomery GI Bill/Americorps:	0	Montgomery GI Bill/Americorps:	0
Total Aid (Fed):	0.00	Total Aid (Inst):	0.00
Unmet Need (Fed):	0.00	Unmet Need (Inst):	0.00
Overaward (Fed):	0.00	Overaward (Inst):	0.00

Federal Calc Information		Institutional Calc Information	
Federal Rule Set:	CSS Rules	Institutional Rule Set:	
		Institutional EFC Used:	

[Return](#) [Monthly EFC](#)

Step	Action
26.	Use the Need Summary page to view the student's cost of attendance and need.
27.	Click the Return link.

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Financial Aid: Packaging Status Summary-041808



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Financial Aid Status

Hiram Footram ID: 0999999

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: UMS05

EFC Status: Unofficial [TERM](#) [SIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

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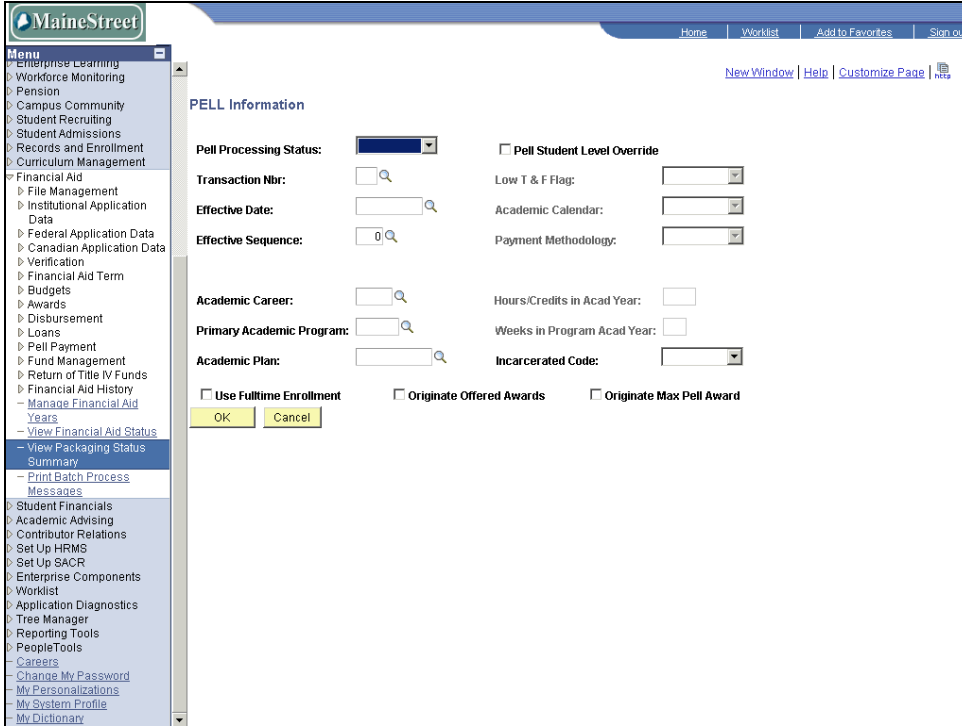
Verification Flag: Not Reqd *Satisfactory Academic Progress: Undetmine [SAP Details](#)

Verification Status: Not Select Loan Entrance Interview Status: Exit Interview:

Self-Service

Award Access: Denied Inquiry Access

Step	Action
28.	Click the PELL link.



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Menu

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- Curriculum Management
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 - File Management
 - Institutional Application Data
 - Federal Application Data
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- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- People Tools
- Careers
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

PELL Information

Pell Processing Status: **Pell Student Level Override**

Transaction Nbr: **Low T & F Flag:**

Effective Date: **Academic Calendar:**

Effective Sequence: **Payment Methodology:**

Academic Career: **Hours/Credits in Acad Year:**

Primary Academic Program: **Weeks in Program Acad Year:**

Academic Plan: **Incarcerated Code:**

Use Fulltime Enrollment **Originate Offered Awards** **Originate Max Pell Award**

Step	Action
29.	Use the PELL Information page to review or update Pell processing information for a student.
30.	Click the OK button. <input type="button" value="OK"/>

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Financial Aid: Packaging Status Summary-041808



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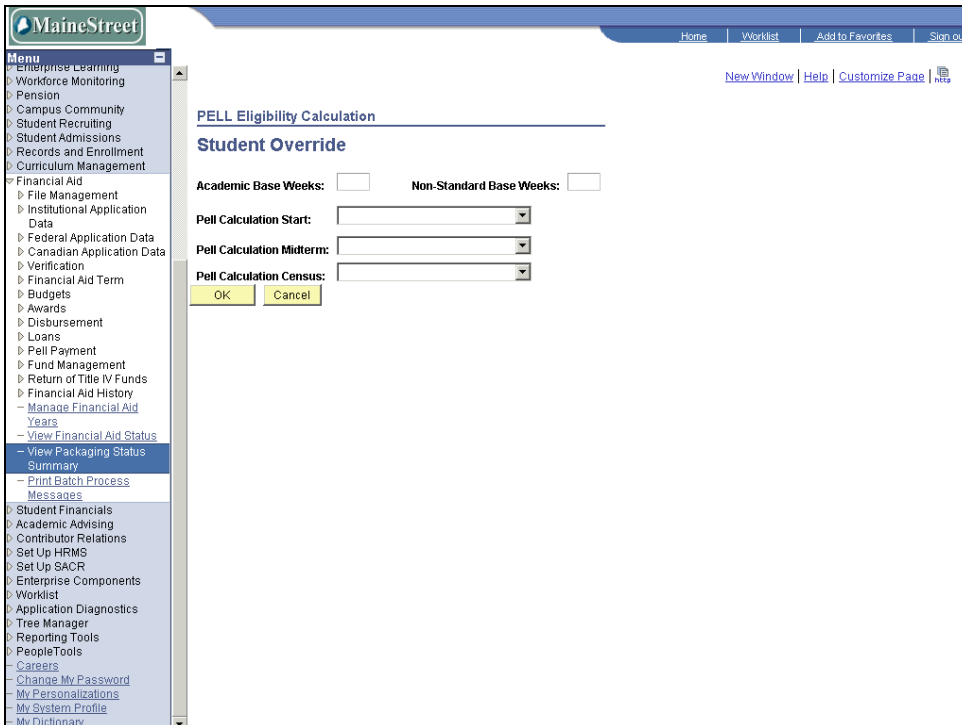
Verification Flag: Not Reqd *Satisfactory Academic Progress: Undetrmine [SAP Details](#)


Verification Status: Not Select Loan Entrance Interview Status: Exit Interview:

Self-Service

Award Access: Denied Inquiry Access

Step	Action
31.	Click the PELL Calculation Override link. PELL Calculation Override



Step	Action
32.	Use the PELL Eligibility Calculation Student Override page to override your institutional Pell eligibility calculation setup for a student.
33.	Click the OK button. 
34.	<p>The Award Access field in the Self-Service box is set to <i>Denied</i> initially. This means that the student does not have access to award acknowledgement for the given year.</p> <p>Setting the field to <i>Allowed</i> means the student can access award acknowledgement through self-service. The <i>Use Filter</i> setting means the student is allowed access if he/she meets the self service access criteria set up by the Institution.</p> <p>If selected, the Inquiry Access checkbox lets the student view his/her awards in self service if the Institution settings permit.</p> <p>These settings may be changed on a student by student basis or by a batch process (refer to the documentation on the process to assign self service access).</p>
35.	Click Save .
36.	End of Procedure.