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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1.</td>
<td>Navigate: <strong>Financial Aid &gt; View Packaging Status Summary.</strong></td>
</tr>
</tbody>
</table>

Make sure the correct **Institution** and **Aid Year** are entered.

Enter information to search for the student. For example, enter the student's ID in the **ID** field, or name in the name fields.
### Step 3

3. **Click the Search button.**

![Search button](image)

### Step 4

4. The student's **EFC Status** represents data from the financial aid application. The status can be **Official**, **Rejected**, or **Unofficial**.

### Step 5

5. The **Counselor** field is optional and informational only - use it to store the emplid of the financial aid counselor for this student.
### Step 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.

### Step 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.

### Step 8

**Scholarship Status**, **Review Status** and **INST Verification Status** fields are manually set and can be used by the Institution as desired.
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<tr>
<td>9.</td>
<td>The <strong>Verification Flag</strong> is automatically set to <strong>Select</strong> if the student's ISIR has been selected for federal verification. The <strong>Verification Status</strong> field is updated during the verification process.</td>
</tr>
<tr>
<td>10.</td>
<td>The <strong>Aid Packaging Method</strong> field is initially set to <strong>Not Pkgd</strong>. It is automatically set to <strong>Auto</strong> if auto packaging is used, and to <strong>Counselor</strong> if manual packaging is used.</td>
</tr>
<tr>
<td>11.</td>
<td><strong>Academic Career</strong> comes from FA Term. <strong>The Packaging Plan ID</strong> is set when the student is auto or mass packaged. The <strong>Aggregate Source</strong> is set to <strong>Default</strong>, which means it is set to whatever value was selected in the installation of financial aid. <strong>Satisfactory Academic Progress</strong> is set by the SAP procedure. You can manually set it here by clicking the <strong>SAP Details</strong> link. The <strong>Loan Entrance Interview Status</strong> and <strong>Exit Interview</strong> fields can be set manually. The <strong>Disbursement Hold</strong> field is manually set. The values are blank (no hold), <strong>Fed Aid, Institut.</strong>, and <strong>Loan Hold</strong>. <strong>The Award Notification</strong> link is not used.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
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<tr>
<td>12.</td>
<td>Click the <strong>TERM</strong> link.</td>
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</tbody>
</table>
### 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.
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<td>15.</td>
<td>Click the <strong>ISIR Information</strong> link.</td>
</tr>
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</table>
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.
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<tr>
<td>18.</td>
<td>Click the <strong>Database Matches</strong> link.</td>
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![Image of Financial Aid Status screen](image-url)
Step | Action
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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).
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.
Process Document
Financial Aid: Packaging Status Summary-041808

### Step 24
Click the **OK** button.

**OK**
<table>
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<tbody>
<tr>
<td>25.</td>
<td>Click the <strong>Need Summary</strong> link.</td>
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</table>

![Image of MaineStreet Financial Aid Status](image-url)
Step | Action
---|---
26. | Use the **Need Summary** page to view the student's cost of attendance and need.
27. | Click the **Return** link.
Step | Action
--- | ---
28. | Click the **PELL** link.
Step | Action
--- | ---
29. | Use the **PELL Information** page to review or update Pell processing information for a student.
30. | Click the **OK** button.
Step 31. Click the **PELL Calculation Override** link.
### Step 32
- **Action**: Use the **PELL Eligibility Calculation Student Override** page to override your institutional Pell eligibility calculation setup for a student.

### Step 33
- **Action**: Click the **OK** button.

### Step 34
- **Action**: The **Award Access** field in the **Self-Service** box is set to **Denied** initially. This means that the student does not have access to award acknowledgement for the given year.

Setting the field to **Allowed** means the student can access award acknowledgment through self-service. The **Use Filter** setting means the student is allowed access if he/she meets the self-service access criteria set up by the Institution.

If selected, the **Inquiry Access** checkbox lets the student view his/her awards in self-service if the Institution settings permit.

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).

### Step 35
- **Action**: Click **Save**.

### Step 36
- **Action**: **End of Procedure.**