

Version	1.0
Document Generation Date	5/2/2008
Date Modified	5/2/2008
Last Changed by	ASDS
Status	Draft

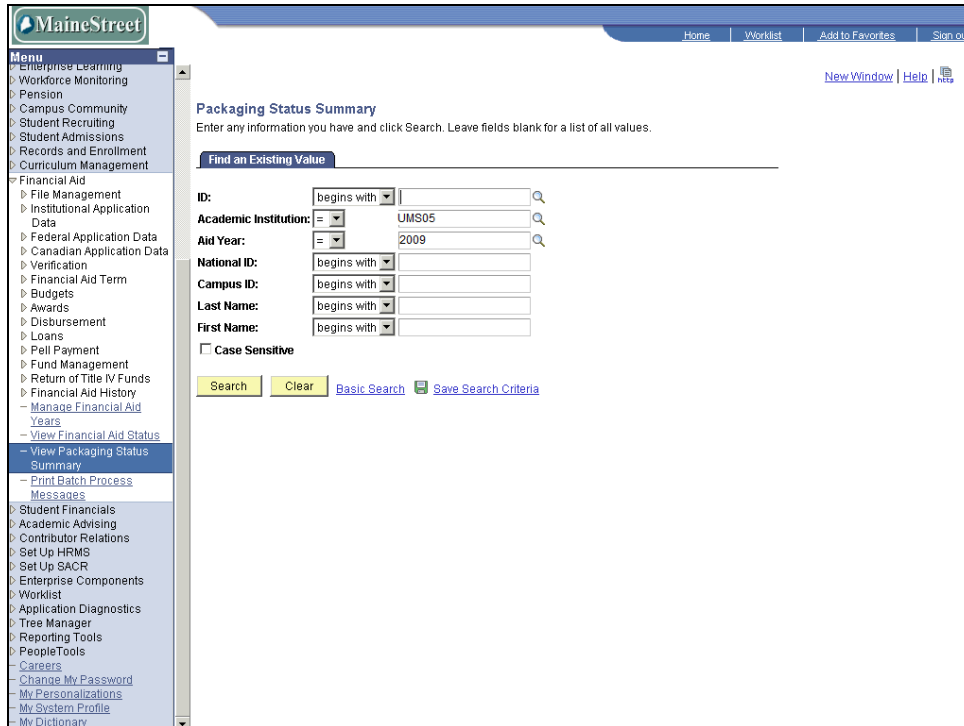
Packaging Status Summary

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.



MaineStreet Home Worklist Add to Favorites Sign out

Menu

- 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
 - My Dictionary

Packaging Status Summary

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

Find an Existing Value

ID: begins with

Academic Institution: UMS05

Aid Year: 2009

National ID: begins with

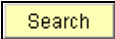
Campus ID: begins with

Last Name: begins with

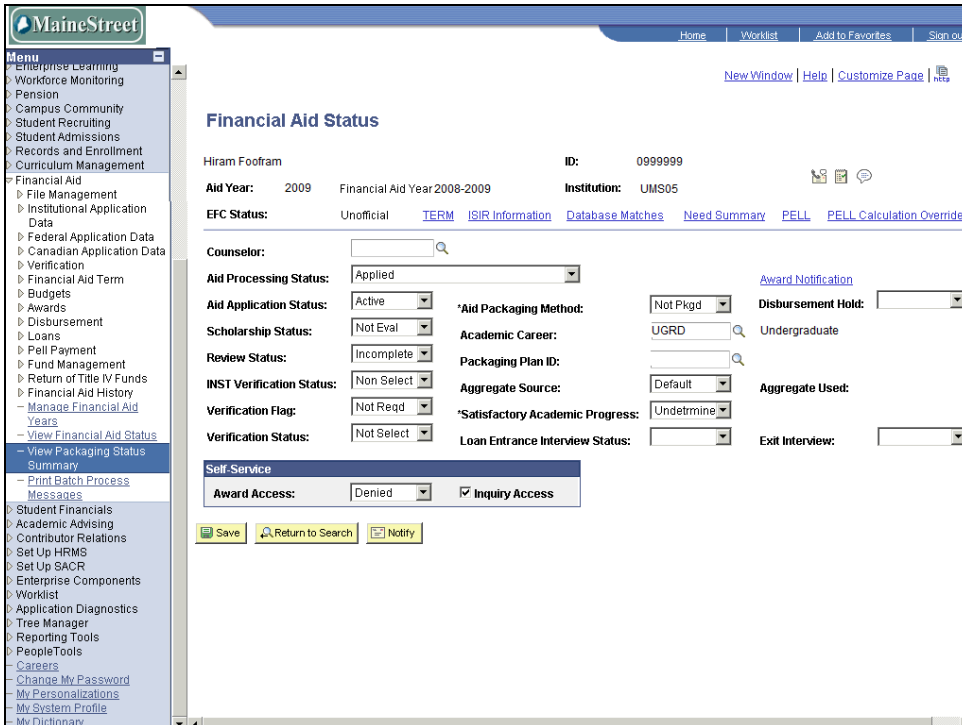
First Name: begins with

Case Sensitive


[Basic Search](#) [Save Search Criteria](#)

Step	Action
2.	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.
3.	Click the Search button. 

Step	Action
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.



MaineStreet Home | Worklist | Add to Favorites | Sign out

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

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: Undetmine

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

Self-Service

Award Access: Denied Inquiry Access

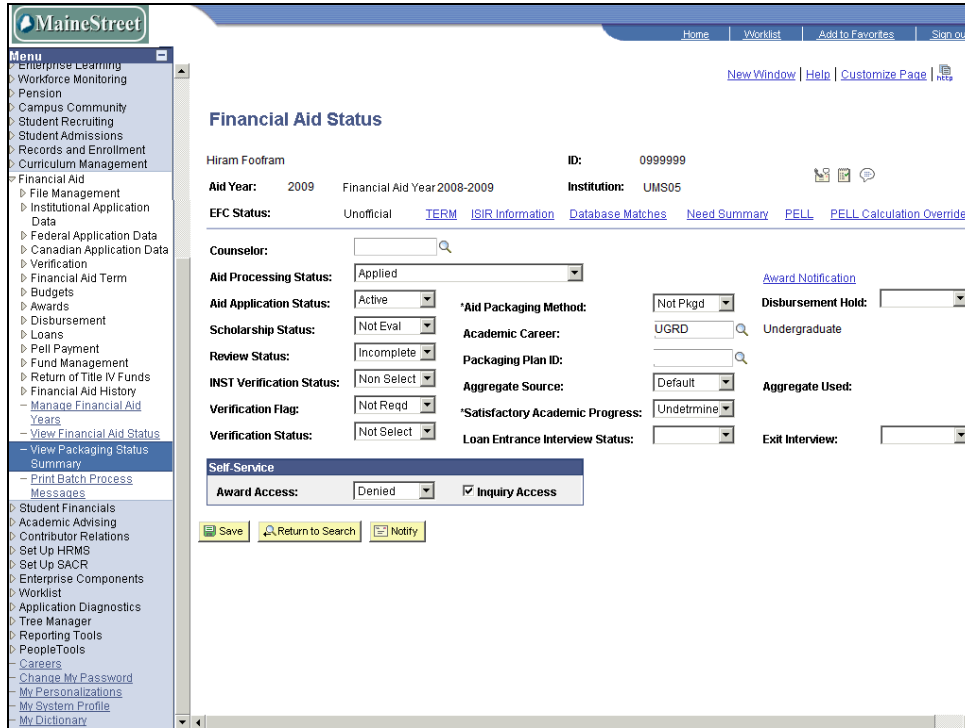
[Save](#) [Return to Search](#) [Notify](#)

Step	Action
6.	The Aid Processing Status field indicates where the student is in the awarding process. The values are as follows: <i>Applied</i> - an ISIR has been loaded for the student, <i>No Electronic Application</i> - no ISIR has been loaded, <i>Packaging Completed</i> - the student's award package has been posted, <i>Ready for Counselor Review</i> - manually set to indicate counselor should review, <i>Ready for Packaging</i> - 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 <i>Active</i> if an ISIR has been loaded. You can manually select values <i>Canceled</i> or <i>Restricted</i> .

Process Document
Financial Aid: Packaging Status Summary-041808



Step	Action
8.	<p>Scholarship Status, Review Status and INST Verification Status fields are manually set and can be used by the Institution as desired.</p>
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, but you can manually set it here.</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>



The screenshot shows the 'Financial Aid Status' page for Hiram Footram. The page includes a navigation menu on the left and a main content area with various status fields. The 'EFC Status' section is highlighted, and the 'TERM' link is visible. Below the status fields, there is a 'Self-Service' section with 'Award Access' set to 'Denied' and 'Inquiry Access' checked. At the bottom of the form, there are 'Save', 'Return to Search', and 'Notify' buttons.

Step	Action
12.	Click the TERM link. TERM

Process Document

Financial Aid: Packaging Status Summary-041808



MaineStreet

Home | Worklist | Add to Favorites | Sign out

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

Financial Aid Status

Term Information

Find | View All | First 2 of 2 Last

Term: 0910	2008 Fall		
Status: Active	Effective Date: 04/09/2008	Statistics	Form of Study
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:		

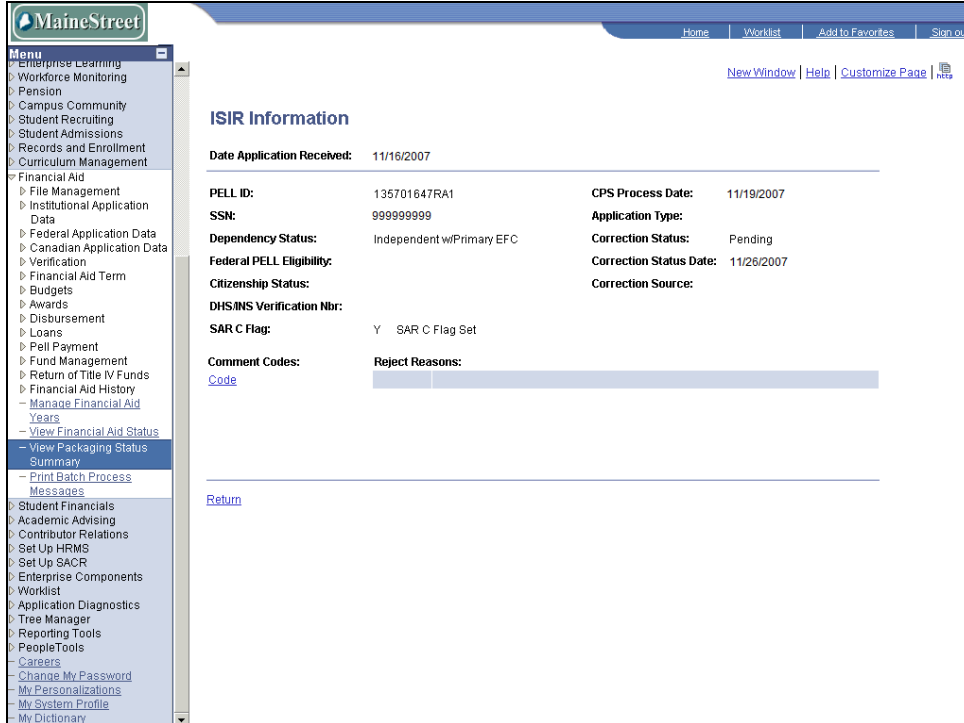
[Return](#)

Menu

- 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
- PeopleTools
- Careers
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

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 to return to the Financial Aid Status page. Return

Step	Action
15.	Click the ISIR Information link. ISIR Information



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Enterprise Learning', 'Financial Aid', and 'Student Financials'. The 'Financial Aid' section is expanded, showing options like 'View Packaging Status Summary'. The main content area is titled 'ISIR Information' and displays the following details:

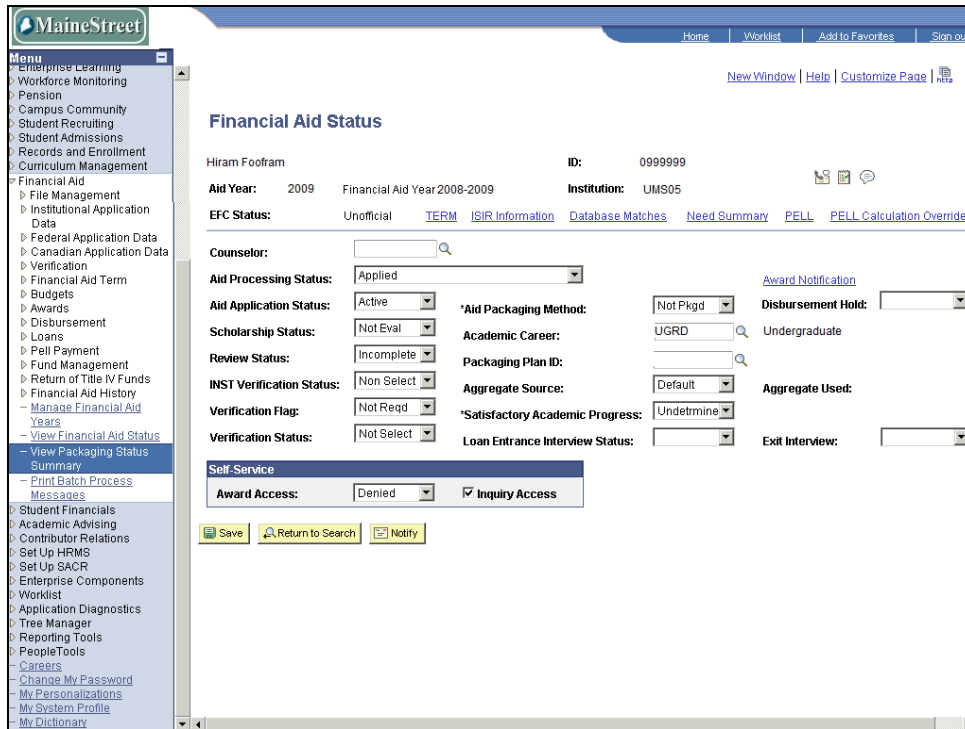
- Date Application Received:** 11/18/2007
- PELL ID:** 135701647RA1
- SSN:** 999999999
- Dependency Status:** Independent w/Primary EFC
- Federal PELL Eligibility:** [Blank]
- Citizenship Status:** [Blank]
- DHS/INS Verification Nbr:** [Blank]
- SAR C Flag:** Y SAR C Flag Set
- Comment Codes:** [Blank]
- Reject Reasons:** [Blank]
- CPS Process Date:** 11/19/2007
- Application Type:** [Blank]
- Correction Status:** Pending
- Correction Status Date:** 11/26/2007
- Correction Source:** [Blank]

At the bottom of the page, there is a [Return](#) link.

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



Process Document

Financial Aid: Packaging Status Summary-041808



MaineStreet

Home | Worklist | Add to Favorites | Sign out

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

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:

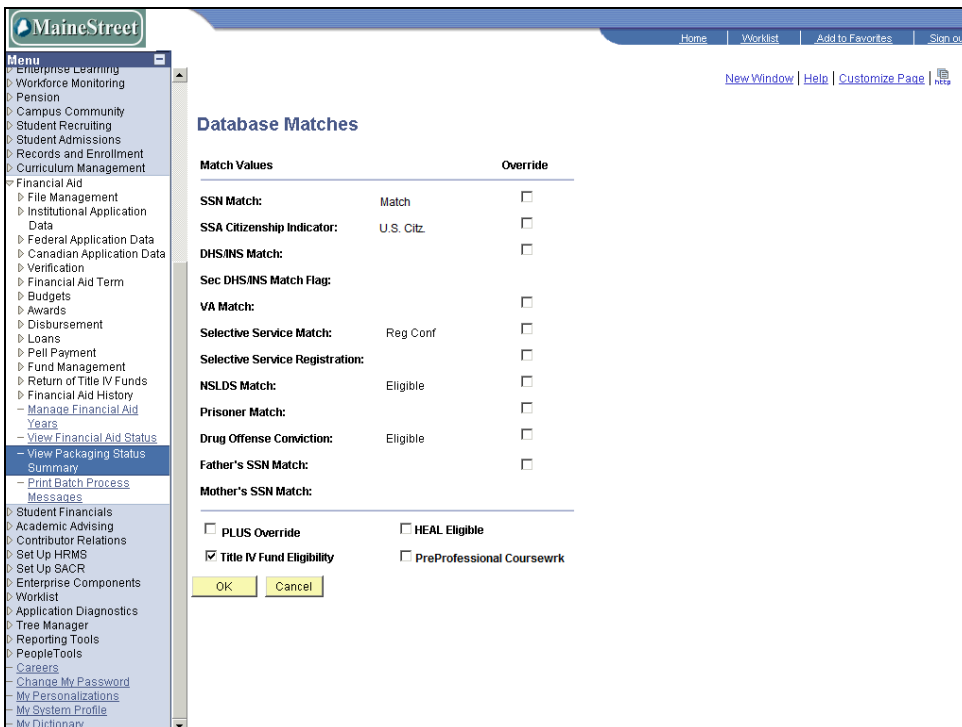
Verification Flag: Not Reqd *Satisfactory Academic Progress: Undetermine

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 to display the Database Matches page. Database Matches



MaineStreet Home Worklist Add to Favorites Sign out

New Window | Help | Customize Page

Database Matches

Match Values	Override
SSN Match: Match	<input type="checkbox"/>
SSA Citizenship Indicator: U.S. Citz.	<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).
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 judgment 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.

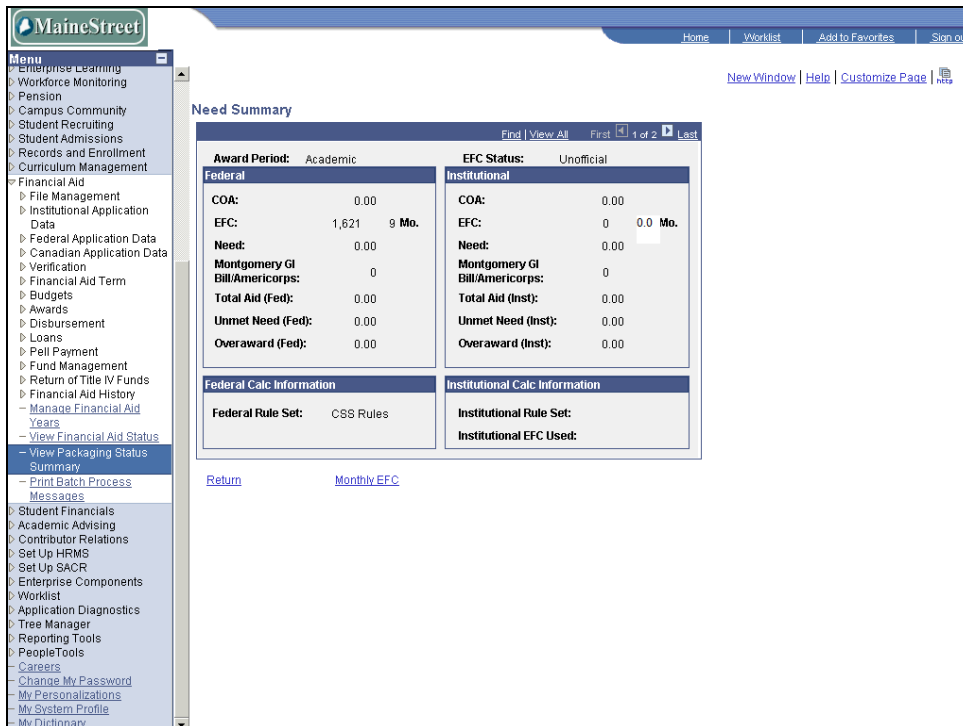
Process Document

Financial Aid: Packaging Status Summary-041808



Step	Action
24.	Click the OK button to save changes and return to the Financial Aid Status page. Click Cancel if you don't want to save your changes.
	

Step	Action
25.	Click the Need Summary link. Need Summary



The screenshot shows the 'Need Summary' page in the MaineStreet system. The page is divided into several sections:

- Award Period:** Academic
- EFC Status:** Unofficial
- Federal Summary:**

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


COA:	0.00
EFC:	0 0.0 Mo.
Need:	0.00
Montgomery GI Bill/Americorps:	0
Total Aid (Inst):	0.00
Unmet Need (Inst):	0.00
Overaward (Inst):	0.00
- Federal Calc Information:** Federal Rule Set: CSS Rules
- Institutional Calc Information:** Institutional Rule Set: Institutional EFC Used:

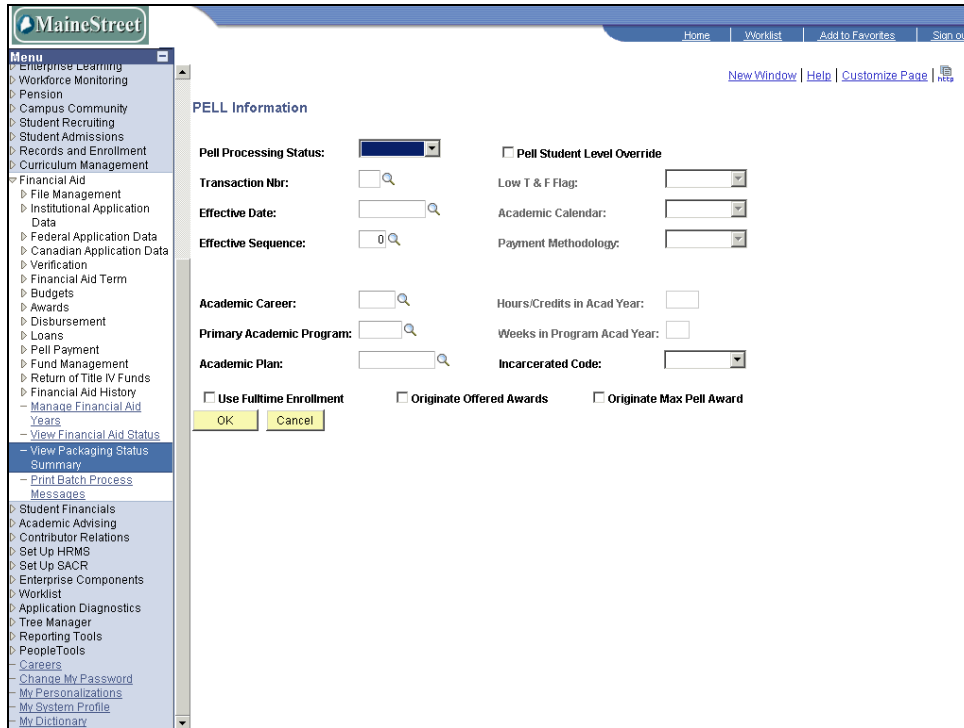
Navigation links include [Return](#) and [Monthly EFC](#). The left sidebar contains a menu with options like 'Enterprise Learning', 'Workforce Monitoring', 'Pension', 'Campus Community', 'Student Recruiting', 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', 'Financial Aid', 'File 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', 'PeopleTools', 'Careers', 'Change My Password', 'My Personalizations', 'My System Profile', and 'My Dictionary'.


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

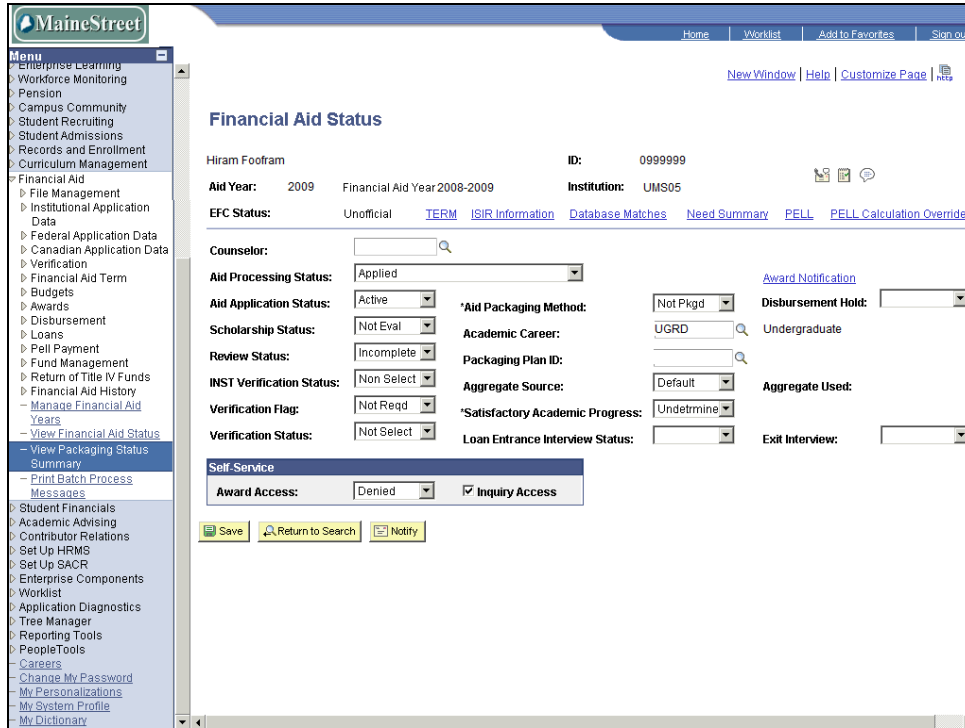
Process Document

Financial Aid: Packaging Status Summary-041808




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. 



MaineStreet Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page |   

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

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

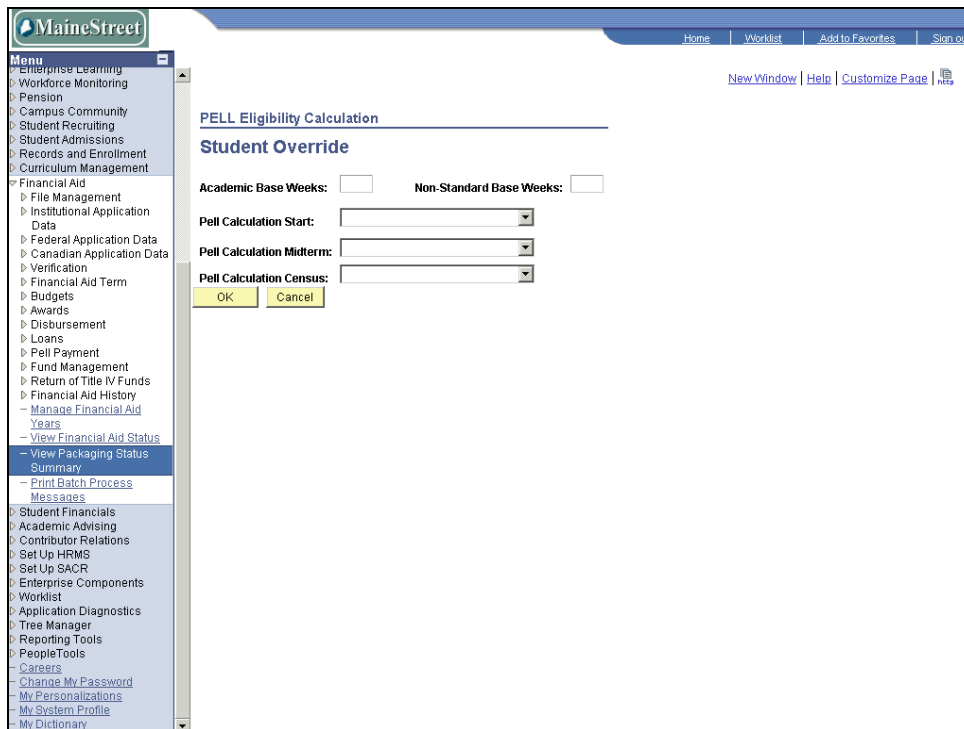
Self-Service

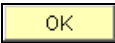
Award Access: Denied Inquiry Access

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

Process Document

Financial Aid: Packaging Status Summary-041808



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.	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. Setting the field to <i>Allowed</i> means the student can access award acknowledgment 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. If selected, the Inquiry Access checkbox lets the student view his/her awards in self service if the Institution settings permit.
35.	Click Save .
36.	End of Procedure.