

Packaging Status Summary-041808

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| 1. | Navigate: Financial Aid > View Packaging Status Summary . |
| 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. |
| 4. | The Counselor field is optional and informational only - use it to store the emplid of the financial aid counselor for this student. |
| 5. | 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, 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. |
| 6. | The Aid Application Status field automatically has value Active if an ISIR has been loaded. You can manually select values Canceled or Restricted . |
| 7. | Scholarship Status , Review Status and INST Verification Status fields are manually set and can be used by the Institution as desired. |
| 8. | The Verification Flag is automatically set to Select if the student's ISIR has been selected for federal verification. The Verification Status field is updated during the verification process. |
| 9. | The Aid Packaging Method field is initially set to Not Pkgd . It is automatically set to Auto if auto packaging is used, and to Counselor if manual packaging is used. |
| 10. | Academic Career comes from FA Term. The Packaging Plan ID is set when the student is auto or mass packaged. The Aggregate Source is set to Default , which means it is set to whatever value was selected in the installation of financial aid. Satisfactory Academic Progress is set by the SAP procedure, but you can manually set it here. The Loan Entrance Interview Status and Exit Interview fields can be set manually. The Disbursement Hold field is manually set. The values are blank (no hold), Fed Aid , Institut. , and Loan Hold . The Award Notification link is not used. |
| 11. | Click the Database Matches link. |
| 12. | 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). |
| 13. | You can select the Override check box next to a database match value to override the federally reported match value. |

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| 14. | 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. |
| 15. | Select the HEAL Eligible check box to increase Stafford loan limits for eligible health professional candidates. |
| 16. | 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. |
| 17. | Click the OK button. |
| 18. | Click the PELL link. |
| 19. | Use the PELL Information page to review or update Pell processing information for a student. |
| 20. | Click the OK button. |
| 21. | Click the PELL Calculation Override link. |
| 22. | Use the PELL Eligibility Calculation Student Override page to override your institutional Pell eligibility calculation setup for a student. |
| 23. | Click the OK button. |
| 24. | Click Save . |
| 25. | End of Procedure. |