

North Dakota University System
Campus Solutions – Financial Aid
External Awards

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North Dakota University System
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External Awards

Overview

External Awards (EA) are aid originating from outside the SFOA.

External Awards notification can come from various sources:

- On a list received from a department or outside agency
- On a file received from a department or outside agency
- Reported by the student via Self-Service
- Report by the student by phone or letter.
- Received from Student Financials records.
- Received as a Loan Certification request.

Some things to note when using EA:

- All awards automatically post as “accepted”.
- Loans are sequenced to the bottom of the order.
- All other aid is sequenced to the top of the order.
- Aid entered via External Aid is shown on Award Entry as EA
- Entering External Aid may create over-awards; repackaging should be run after using EA processes.

We are not “early implementers” of External Awards; a number of other CS 9.0 customers have implemented this new functionality and have done a lot of trouble-shooting. Bundle 10 contained fifteen fixes for External Awards.

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General Set Up

Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types

If an existing award of a particular financial aid item type should be automatically canceled when an award of this financial aid item type is subsequently awarded, enter the financial aid item type to be canceled in the *Auto Cancel Item Type* field. This enables you to award using an *estimated* financial aid item type and then replace it with the *actual* financial aid item type when funds have been approved or certified. For example, you may have estimated a state grant and then replaced the award with an actual state grant award.

SetID: BSC01
Item Type: 900000001200 [North Dakota State Grant](#)
Aid Year: 2009 Federal Aid Year 2008 -2009

Award Attributes Find | View All First 1 of 1 Last

Effective Date: 11/26/2003 Status: Active
Pass Anticipated Aid: Accepted Anticip Aid Expiration Days: 180
Disbursement Method: Stdnt Acct **Auto Cancel Item Type: 900000001210**
 Signature Required Manual Authorization Include in Transcript

Print Letter Option: Print Print as Award Item Print as Other Resource
Award Letter Print:
Award Message:

Self Service Actions
 Accept Reduce Decline

This feature functions only during manual awarding or using the external awards process or repackaging process. According to PeopleBooks, it does not work with auto packaging or mass packaging.

Set Up SACR > Product Related > Financial Aid > External Awards > Define External Award Types

One time Global set up by Campus Solutions.

External Award Type

*Award Type	*Description	Short Description		
EXT	External Scholarship	Ext Sch	+	-
FWS	Federal Works Study	FWS	+	-
GNT	Grant	Grant	+	-
INT	Internal Scholarship	Int Sch	+	-
LNS	Loans	Loan	+	-
STP	Employee Stipend	Emp Stip	+	-
TPC	Third Party Contract	3rd Party	+	-
WVR	Waiver	Waiver	+	-

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Set Up SACR > Product Related > Financial Aid > External Awards > Define External Award Sources	
<p>One time Global set up by Campus Solutions.</p> <p>A committee has met, and their recommendations are indicated.</p> <p>The test for whether an award should be set up here is:</p> <ol style="list-style-type: none"> 1. Will it be reported by a student through self-service? 2. Will it be imported from Student Financials? 3. Will it be received on a file that will be imported? 	<ol style="list-style-type: none"> 1. External Award Source and Program Codes <ol style="list-style-type: none"> a. DOD Department of Defense <ol style="list-style-type: none"> i. AF Air Force ii. AFR Air Force Reserve iii. AR Army Reserve iv. RTC Reserve Officers Training Corp v. National Guard b. DPT Departmental Awards c. ND North Dakota State Agency <ol style="list-style-type: none"> i. SSI North Dakota State Grant ii. SSE Estimated ND State Grant d. OTH Other External Award <ol style="list-style-type: none"> i. DS Dollars for Scholars ii. AFA Air Force Aid Society iii. AL American Legion iv. FFA Future Farmers of America v. KIW Kiwanis vi. LIO Lions vii. REN Renaissance viii. ROT Rotary ix. VFW Veterans of Foreign Wars e. SCH School <ol style="list-style-type: none"> i. ATH Athletic ii. ACD Academic iii. VOC Vocational Programs iv. JOU Journalism v. VIS Visual Arts vi. CDW Cultural Diversity Waiver vii. ITW Institutional Tuition Waiver viii. NTW International Tuition Waiver ix. ENL Enrollment Services x. WAV Other Waiver f. SF Student Financials <ol style="list-style-type: none"> i. TW Tuition Waiver ii. TPC Third Party Credit iii. PMT Payments

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Set Up SACR > Product Related > Financial Aid > External Awards > Item Type Cross Reference

MISUB Example. At minimum, State Grant needs to be set up, if you want to be able to import that file.

Note the Self-Service check box on the right. If you want a student to be able to select this award from a drop down in Self-Service, select that box.

External Award Cross Reference

Academic Institution MISUB Minot State Univ-Bottineau Aid Year 2008 -2009

*Award Type	*Source	Program Code	*Item Type	Description	Self Service
EXT	OTH	AFA	950000001400	AIR FORCE AID SOCIETY	<input checked="" type="checkbox"/>
EXT	OTH	DS	950000001103	Dollars for Scholars	<input checked="" type="checkbox"/>
GNT	ND	SSI	900000001200	NORTH DAKOTA STATE GRANT	<input type="checkbox"/>
WVF	SCH	CDW	930000001100	Diversity Waiver	<input type="checkbox"/>
WVF	SF	TW	930000001200	Institutional Tuition Waiver	<input type="checkbox"/>

This step is needed to be able to load awards from a file, from self service or from Student Financials.

Set Up SACR > Product Related > Financial Aid > Awards > Repackaging Plan

After running external award process (other than for loans), it would be good to repackage students to remove Need and/or COA over-awards.

This example makes reductions beginning with the “bottom” award.

Selection criteria FAPNDUDECRS identifies students with a Federal over-award amount or who are over their cost of attendance in the Academic Year. If a school has a need to repackage summer aid, contact Campus Solutions so we can create an equation for that. You’ll need a separate plan with a different equation for summer.

Repackaging Plan

Academic Institution: MISUB Minot State Univ-Bottineau Aid Year: 2010
Academic Career: UGRD Undergraduate Repackaging Plan ID: DECREASE

Repackaging Target

*Effective Date: 05/01/2009 *Status: Active *Processing Order: 5
*Description: Decrease from the Bottom Up Short Description: Decrease
*Award Period: Both Selection Criteria: FAPNDUDECRS

FM Need Target: Constant Equation Percent % Need FM: 100.0
IM Need Target: Constant Equation Percent % Need IM: 100.0

Repackaging Rule

Rule Nbr 1
Repackaging Rule Decrease
Need Threshold Federal overaward Tolerance
Method Reduce awards by type/sou
Financial Aid Type Source
 Reduce/Cancel disbursed amount

Rule Nbr 2
Repackaging Rule Decrease
Need Threshold Federal overaward COA Tolerance
Method Bottom-up Reduction
 Reduce/Cancel disbursed amount

If you do not package loans last in your packaging plan, instead of the *Bottom-up Reduction* Method, you may want to use *Reduce awards by type/source*, then select a *Financial Aid Type* of *Loan* and a *Source* of *Federal*.

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Manually Entering External Awards

There are two different ways that you can manually enter External Awards, either by Type or by Student:

Set Up

If you are not entering Stafford loans through the manual external award processes, then no set up is required before using the manual processes.

Set Up SACR > Product Related > Financial Aid > Awards > Related Item Type Group													
<p>Should you decide to award Stafford Loans through External Awarding, a Related Item Type Group would be required to pair sub and unsub. Take care to ensure that you pair the same item types as you pair in the corresponding Loan Type (i.e., if 910000002100 and 910000002200 are paired together as Loan Type SF1, they need to be paired together as a Related Item Type Group.)</p>	<div><h3>Related Item Type Group</h3><p>Academic Institution: MISUB Minot State Univ-Bottineau Aid Year: 2009 Academic Career: UGRD Undergraduate Related Item Group: STAFORD</p><p>Find First 1 of 1 Last</p><p>*Effective Date: 12/03/2008 Status: Active</p><p>Description: Stafford Short Description: Stafford</p><p>Group Maximum: Maximum Number of Awards: Selection Criteria: </p><table border="1"><thead><tr><th colspan="3">Related Items</th></tr><tr><th>Item Type</th><th>Description</th><th>Processing Order</th></tr></thead><tbody><tr><td>910000002100</td><td>FEDERAL STAFFORD LOAN #1</td><td></td></tr><tr><td>910000002200</td><td>FEDERAL UNSUBSIDIZED LOAN #1</td><td></td></tr></tbody></table></div>	Related Items			Item Type	Description	Processing Order	910000002100	FEDERAL STAFFORD LOAN #1		910000002200	FEDERAL UNSUBSIDIZED LOAN #1	
Related Items													
Item Type	Description	Processing Order											
910000002100	FEDERAL STAFFORD LOAN #1												
910000002200	FEDERAL UNSUBSIDIZED LOAN #1												

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Procedure

Financial Aid > Awards > External Awards > Add External Awards by Type

Add an external award one or multiple students

You can choose to award by either Award Type and Source and Program or simply by Item Type. Note you can use an Entry Code of *New*, *Append* or *Replace*, but *Replace* is the default. If the system doesn't find an existing award, it uses an Entry Code of *New*.

If you are entering loans from a list, note that for Stafford loans, instead of using an Item Type, you'll use a Related Item Type. For PLUS and alternative, do use the item type.

Other Loans would be entered by Item Type (or Award Type/Source/Program codes)

You can leave Award Amount blank for one term awards; just click on Award Detail and put it there.

Add External Awards by Type

Institution NDSU1 North Dakota State University Aid Year 2008 -2009 NDSU1

Transaction Date Transaction Nbr

Award Type Loan Certification

Source

Program

Item Type 930000001280 Staff/Dep/Spouse Tuition Waive

*Student ID	Name	*Entry Code	Award Amount	
073	Achie	Replace	5000.00	Award Detail + -
073	Albal	Replace	5000.00	Award Detail + -
071	Albri	Replace	5000.00	Award Detail + -

Add External Awards by Type

Institution MISUB Minot State Univ-Bottineau Aid Year 2008 -2009 MISUB

Transaction Date Transaction Nbr

Award Type Loan Certification

Source Related Item Group STAFORD

Program

Item Type

*Student ID	Name	*Entry Code	Award Amount	
<input type="text"/>	<input type="text"/>	New	4000	Award Detail + -

Add External Awards by Type

Institution MISUB Minot State Univ-Bottineau Aid Year 2008 -2009 MISUB

Transaction Date Transaction Nbr

Award Type Loan Certification

Source Related Item Group

Program

Item Type 910000002600 SLND DEAL LOAN

*Student ID	Name	*Entry Code	Award Amount	
<input type="text"/>	<input type="text"/>	New	0.00	Award Detail + -

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If you click on *Award Detail*, you may enter *Disbursement Plan* and *Split Code* for the award. If you leave them blank, the Defaults from **FA Item Type** get used.

You may alternatively enter *Scheduled Award* and *Term* for one term awards where you want the default Disbursement Plan/Split Code to remain.

For Replace or Append awards, the *Disbursement Plan* and *Split Code* information must be the same as the original award.

You can enter a comment and also determine whether the text in the Comment box is visible to the student in Self-Service

Award Disbursement Detail

ID 0726995 Achtenberg, Carter

Description

Award Amount

Disbursed Amount

Academic Career

Disbursement Plan Split Code

Disb Nbr	Disb ID	Scheduled Award	Disbursed Amount	Term
<input type="text"/>	<input type="text"/>	1000	<input type="text"/>	0930

Comments Visible in Self Service

Financial Aid > Awards > External Awards > Manage External Award Data

Once the award has been entered on the “Add” page, you can see it/adjust it here.

Manage External Award Data

Transaction Nbr 10 Date 02/13/2009
 Data Source Manual Add User ID djunk
 Student Count 1 Award Total 5,000.00

From Row To Row Row Count 1

Status	EmplID	National ID	Last Name	First Name	Date of Birth
1 Unprocessed	0737		Achiek	Daniel	01/01/1975

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Aid > Awards > External Awards > Load External Awards

Run this process to actually post the award to the student's record.

According to help, if a student's aid package is updated with an external award and has an over-award greater than zero and Aid Processing Status is *Packaging Completed*, then the student's Aid Processing Status is changed to *Repackage*.

In practice, that doesn't seem to always happen, so we have developed a repackaging equation to find students with an over-award.

Load External Awards

Run Control ID: Load_External_Awards_dj

[Report Manager](#) [Process Monitor](#)

Process Instance:1555850

Report Request Parameters

*Institution	<input type="text" value="NDSU1"/>	North Dakota State University
*Aid Year	<input type="text" value="2009"/>	Federal Aid Year 2008-2009
*Status	<input type="text" value="Unprocessed"/>	
Data Source	<input type="text" value="Manual Entry"/>	
File Mapping ID	<input type="text"/>	
Transaction Date	<input type="text" value="02/13/2009"/>	Transaction Nbr <input type="text"/>
Award Type	<input type="text"/>	Source <input type="text"/> Program Code <input type="text"/>

Update Aid Processing Status

Exclude Exclude EA Load if SAP = Y

Load Processing Rule

Term Mismatch	<input type="text" value="Error"/>
Multi-Career	<input type="text" value="Error"/>

Student Aid Package [Need Summary](#) [Term Summary](#)

Aid Year: 2009	Federal Aid Year 2008 -2009	ID: Institution: NDSU1			
Career: <input type="text" value="UGRD"/>	Undergrad	Package Status: <input type="text" value="Completed"/>	Award Notification		
Packaging Plan ID: <input type="text" value="RESTRICTED"/>	<input type="button" value="Retrieve"/>	Aggregate Source: <input type="text" value="Default"/>	<input type="button" value="Validate"/>		
Repackaging Plan ID: <input type="text"/>	<input type="button" value="Repackage"/>	Award Period: <input type="text" value="Both"/>	<input type="button" value="Post"/> <input type="button" value="Reset"/>		

[Award](#) [Status](#)

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
10	<input type="checkbox"/>	UGRD	930000001280	Staff/Dep/Spouse Tuition Waive	5,000.00	5,000.00	01	01 Disbursement <input type="button" value="+"/>

Financial Aid > Awards > External Awards > Manage Student External Awards

Note that from this page you can load external awards for an individual student.

External Awards [Award Summary](#)

Sheena	ID: 043			
Aid Year: 2009	Federal Aid Year 2008-2009	Institution: MISUB		
Aid Processing Status:	<input type="text" value="Repackage"/>	<input type="button" value="Load"/>		

Filter by

Type <input type="text"/>	Source <input type="text"/>	Processing Status <input type="text"/>	<input type="button" value="Refresh"/>
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EA Transaction [Award](#) [Status](#)

Trans Nbr	Seq	Status	Date	Data Source	External Award Type	Source	Program
20	1	<input type="text" value="Unprocessed"/>	02/17/2009	Manual Add			
18	1	Processed	02/16/2009	SF Feed	Waiver	School	CDW

North Dakota University System Campus Solutions – Financial Aid External Awards

Financial Aid > Awards > External Awards > Add External Awards to Student

You can also add awards a student at a time. The second tab lets you view student's awards record and need summary totals to make an overall assessment before manually adding a new external award transaction.

You can choose to award by either Award Type and Source and Program or by Item Type. Note you can New, Append or Replace an Award. Replace will act as New if the award doesn't already exist.

The advantage to using this screen over Award Entry is that you can show a non-disbursing item type as disbursed (i.e., where FA Item Type has a Disburse Method value of *No*).

Hannah ID: 071
 Aid Year: 2009 Federal Aid Year 2008-2009 Institution: NDSU1

Student Aid Package									
Nbr	Career	Item Type	Description	Category	Status	Offered	Accepted	Disb Plan	Split Code
10	UGRD	930000001280	Staff/Dep/Spouse Tuition Waive	Waiver	Accepted	5,000.00	5,000.00	01	XX Disbursement
20	UGRD	910000002200	Federal Unsub Stafford Loan	Loan	Accepted	5,500.00	5,500.00	01	01 Disbursement
30	UGRD	910000003200	CitiAssist Loan	Loan	Accepted	3,000.00	3,000.00	01	01 Disbursement
40	UGRD	910000003210	CitiAssist Loan	Loan	Accepted	3,000.00	3,000.00	09	02 Disbursement

Need Summary by Award Period						
Award Period	Total Aid (Fed)	Unmet Need (Fed)	Overaward (Fed)	Total Aid (Inst)	Overaward (Inst)	Unmet Need (Inst)
Academic	16,500.00	0.00	310.00	0.00	0.00	16,190.00
Non Standard	0.00	0.00	0.00	0.00	0.00	0.00

Add External Awards View Award Summary

ID: _____
 Aid Year: 2009 Federal Aid Year 2008-2009 Institution: NDSU1
 Transaction Date: 02/13/2009 Transaction Nbr: 16

Award Type: _____ Loan Certification
 Source: _____ *Entry Code: Replace
 Program: _____ Academic Career: Undergraduate
 Item Type: 930000001280 Staff/Dep/Spouse Tuition Waive
 Description: _____
 Amount: 5,000.00 Disbursed: 5,000.00
 Disbursement Plan: Split Code: Paid in full:

Disbursements				
Disb Nbr	Disb ID	Scheduled Award	Disbursed Amount	Term
1	01	2,500.00	2,500.00	0910
2	02	2,500.00	2,500.00	0930

Award Disbursement/Split

Sequence: 10 Item Type: 930000001280 Net Award Amount: \$5,000.00
 Disbursement Plan: 01 Split Code: XX

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0910	Academic		2,500.00	2,500.00	2,500.00	2,500.00
02	0930	Academic		2,500.00	2,500.00	2,500.00	2,500.00

If batch packaging has already been done, recommend running Repackaging to reduce Need and/or COA over-awards. See separate Repackaging sections at the end of the document for Batch Repackaging or Individual Repackaging.

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Loading Awards From A File

Set Up

Set Up SACR > Product Related > Financial Aid > External Awards > Search/Match Rules

Search/Match rules are set up by institution, so schools can choose how to handle each of the match criteria.

Use Search Parameter “NDUSTESTLOAD”, however, I’m recommending we not use the Last Name + DOB combination, as it would pick up twins incorrectly.

External Award Search Match Rules

Institution WSC01 Williston State College

Aid Year 2009-2010

File Mapping NDU_FA_STATE_GRANT

Search Parameter NDUS Test Score Load

No Match Found			
	Update	Suspend	Ignore
New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Match(es) Found			
			Find First <input type="checkbox"/> Last <input type="checkbox"/>
Order Nbr 10			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS All NDUS Fields
Order Nbr 20			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS Name, NID, DOB
Order Nbr 30			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS NAME, DOB & City
Order Nbr 40			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS Name & DOB
Order Nbr 50			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS Name and NID
Order Nbr 60			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS Last Name, DOB, NID
Order Nbr 70			
One Match:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NDUS Last Name, DOB
Order Nbr 80			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS Last Name & NID
Order Nbr 90			
One Match:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NDUS Search - National ID

North Dakota University System Campus Solutions – Financial Aid External Awards

Set Up SACR > System Administration > Utilities > File Parser > File Mapping Definition

This is Global set up that will need to be done by Campus Solutions. This is for importing files only.

File Definition example.

File Definition

Map Name

*Map Name: NDU_FA_STATE_GRANT *Status: Active

*Context Definition: External Award Load

*File Type: Delimited *Delimiter: Semicolon *Qualifier: []

Conversion Definition: []

Multiple Row Types

File Layout Tab example. This is for importing files only.

Note award amount must be signed decimal field type.

File Layout

Map Name: NDU_FA_STATE_GRANT

Row Types: NDU_FA_STATE_GRANT Staging Table: [] Load Fields

File Fields

Location	*Sort Order	*File Field Name	Field Number	Field Type
1	10	NDUS School Code	1	Character
2	20	Blank	2	Character
3	30	LName	3	Character
4	40	FName	4	Character
5	50	MI	5	Character
6	60	SSAN	6	Character
7	70	NDUS School Code 2	7	Character
8	80	Award Amount	8	Signed Decimal
9	90	Award Status	9	Character
10	100	Unknown	10	Character
11	110	Trailer	11	Character

Create a Header then add a row to add the detail.

Mapping

Map Name: NDU_FA_STATE_GRANT

Row Types: NDU_FA_STATE_GRANT

Field Mapping

*Record: SFA_EASTAGE_HDR Row: 1 Auto Map Synchronize to Context

Field Mapping Detail

Field Name	Field Type	Required	*Mapping Action
1 CPS_SCHOOL_CODE	Char	No	None

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Once the header is created, then add this row with the detail.

Be sure to enter either Item Type or Type/Source/Program Codes.

FA_EA_Report_CD is required. Must be New, Replace or Append.

Field Name	Field Type	Required	Mapping Action	File Field Name	Value
1 NATIONAL_ID	Char	No	Direct from File	SSAN	
2 BIRTHDATE	Date	No	None		
3 LAST_NAME	Char	No	Direct from File	LName	
4 FIRST_NAME	Char	No	Direct from File	FName	
5 MIDDLE_NAME	Char	No	Direct from File	Mi	
6 EMPLID	Char	No	None		
7 ACAD_CAREER	Char	No	None		
8 SFA_EA_TYPE	Char	No	Default Value		GNT
9 SFA_EA_SOURCE	Char	No	Default Value		ND
10 SFA_EA_PROGRAM_CD	Char	No	Default Value		SSI
11 SFA_EA_LOAN_CERT	Char	No	None		
12 SFA_EA_REPORT_CD	Char	Yes	Default Value		Replace
13 ITEM_TYPE	Char	No	None		
14 REL_ITEM_TYPE	Char	No	None		
15 DESCR	Char	No	None		
16 DISBURSEMENT_PLAN	Char	No	None		
17 SPLIT_CODE	Char	No	None		
18 NET_AWARD_AMT	Signed	No	Direct from File	Award_Amount	
19 DISBURSED_AMOUNT	Number	No	None		

Import file and preview data on last tab.

File Definition | File Layout | Mapping | Preview Layout | Preview Data

Map Name: NDU_FA_STATE_GRANT Preview Data

Attached File: HE1BSC01.CSV Add Attachment Delete Attachment View Attachment

Row Types: NDU_FA_STATE_GRANT

Field Mapping

Record: SFA_EASTAGE_DTL Row: 1

Parent Record: SFA_EASTAGE_HDR Parent Row: 1

Field Values

Field Name	Value
1 NATIONAL_ID	123456789
2 BIRTHDATE	
3 LAST_NAME	BLACK
4 FIRST_NAME	JACQUELENE
5 MIDDLE_NAME	J
6 EMPLID	
7 ACAD_CAREER	
8 SFA_EA_TYPE	GNT
9 SFA_EA_SOURCE	ND
10 SFA_EA_PROGRAM_CD	SSI
11 SFA_EA_LOAN_CERT	
12 SFA_EA_REPORT_CD	R
13 ITEM_TYPE	
14 REL_ITEM_TYPE	
15 DESCR	
16 DISBURSEMENT_PLAN	
17 SPLIT_CODE	
18 NET_AWARD_AMT	800

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Procedure

Financial Aid > Awards > External Awards > Process External Award File

This is an example of loading State Grants from the file sent by Peggy Wipf. The file path here will be the folder on Sophie where Peggy's process puts the file.

Normally, the File List Indicator will NOT be selected.

External Award Staging Process

Run Control ID: ExternalAward_Staging_Proc_dj [Report Manager](#) [Process Monitor](#) **Run**

Parameters	
*Institution	DSU01 <input type="text"/> Dickinson State University
*Aid Year	2009 <input type="text"/> Federal Aid Year 2008-2009

File Mapping ID: NDU_FA_STATE_GRANT

File Path List		Customize	Find	First	1 of 1	Last
File Path	File List Indicator					
\\172.16.129.92\home\financialaid\state_grant\Test\DSU01\HE1	<input type="checkbox"/>					

Use this file path for **State Grant**, which IS case sensitive; substitute your institution and file name, which is in a format like HE1DSU01.CSV:
[\\172.16.129.92\home\financialaid\state_grant\Prod\DSU01\\(\(FILENAME\)\).CSV](http://172.16.129.92/home/financialaid/state_grant/Prod/DSU01/(FILENAME).CSV)

Use this file path for items you put in your **Reports** folder on Sophie. Use your school code instead of DSU01:
[\\172.16.129.92\home\financialaid\Reports\DSU01\\(\(FILENAME\)\).CSV](http://172.16.129.92/home/financialaid/Reports/DSU01/(FILENAME).CSV)

In Stage, a general file definition called NDU_FA_GENERAL_FORMAT has been set up for testing. To use it, put the information in this order without a header row:

- Emplid (Optional if SSAN is provided; must have leading zeroes)
- SSAN (Optional if Emplid is provided)
- First Name
- Middle Initial
- Last Name
- Item Type Number (be careful it isn't in scientific notation)
- Award Amount (without any dollar formatting)

A Search/Match page will be needed for each institution (see page 11). To load the file, first put it in your Reports folder on Sophie, then load it from there.

North Dakota University System Campus Solutions – Financial Aid External Awards

Financial Aid > Awards > External Awards > View Data File Staging Results

Note that at this point, Search/Match has not run. You have the opportunity to remove any students that should not be processed further.

If you will want to only load this process number, you'll want to make note of it for the load process

External Award File Summary

Institution DSU01 Dickinson State University **Aid Year** 2008 -2009
Transaction Nbr 21 **Date** 03/10/2009 **Process Instance** 1556283 **Status** Processed
File Mapping ID NDU_FA_STATE_GRANT **Operator Id** djunk
File Name \\172.16.129.92\home\financialaid\state_grant\TestDSU01\HE1DSU01.CSV
Student Count 218 **Award Total** 168,400.00
Actual Count 218 **Actual Total** 168,400.00

From Row To Row Row Count 218

Student Information					Award	Status
EmpID	National ID	Last Name	First Name	Date of Birth		
1	123-45-6789	AD	KYLE			
2	234-56-7890	AND	JAINEEN			
3	345-67-8901	AND	MELISSA			

Student Information							Award	Status
Entry Code	Program	Item Type	Loan Cert	Career	Award Amount			
1	Replace		<input type="checkbox"/>		800.00	Disbursement		
2	Replace		<input type="checkbox"/>		800.00	Disbursement		
3	Replace		<input type="checkbox"/>		800.00	Disbursement		

Student Information						Award	Status
	Processing Status	Date/Time Processed	Suspend Reason	Adjust Reason	Ineligible Code		
1	Unprocessed	12/05/08 14:36					
2	Unprocessed	12/05/08 14:36					
3	Unprocessed	12/05/08 14:36					

North Dakota University System
Campus Solutions – Financial Aid
External Awards

Financial Aid > Awards > External Awards > Load External Awards

This is the process that does the search/match to determine EmplIDs for students

Note that there are currently three equations you can use to exclude students:
 Exclude if SAP = Y
 Exclude if Disb Hold
 Exclude if Need/COA
 Over-award < 200

We have the option of creating additional equations if required.

Note the Item Type is mapped from the Award Type/Source/Program Code, so needs to be set up on the cross reference page.

Load External Awards

Run Control ID: Load_External_Awards_dj [Report Manager](#) [Process Monitor](#)

Report Request Parameters	
*Institution	DSU01 <input type="text"/> Dickinson State University
*Aid Year	2009 <input type="text"/> Federal Aid Year 2008-2009
*Status	Unprocessed <input type="text"/>
Data Source	External File <input type="text"/>
File Mapping ID	NDU_FA_STATE_GRANT <input type="text"/>
Transaction Date	12/05/2008 <input type="text"/> Transaction Nbr <input type="text" value="5"/>
Award Type	Grant <input type="text"/> Source ND State <input type="text"/> Program Code SSIG <input type="text"/>
Update Aid Processing Status	
Exclude	FAEAEXCLUDE <input type="text"/> Exclude EA Load if SAP = Y
Load Processing Rule	
Term Mismatch	Error <input type="text"/>
Multi-Career	Error <input type="text"/>

Financial Aid > Awards > External Awards > External Award Load Summary

External Award Load Summary gives an overview of your process

External Award Load Summary

Process Instance	1554766		
Institution	DSU01 Dickinson State University	Aid Year	2008 -2009
Processing Status	Unprocessed		
Data Source	External File	File Mapping ID	1009
Transaction Date	12/05/2008	Transaction Nbr	4
Award Type	Source	Program Code	
Selected	220	Multi-Career Action	Error
Processed	0	Invalid Term Action	Error
Skipped	25	Exclusion Equation	FAEAEXCLUDE <input type="text"/>
In Error	195		<input type="button" value="Main Content"/>

North Dakota University System
Campus Solutions – Financial Aid
External Awards

Financial Aid > Awards > External Awards > External Award Load Detail

External Award Load Detail gives a person by person breakdown.

Customize Find							
Student Information		Award	Status				
Trans Nbr	Seq	Status	EmpID	National ID	Birthdate	Last Name	First Name
7	1	Processed	073	501	AD		KYLE
7	2	Processed	071	502	AN		JAINEEN
7	3	Processed	068	502	AN		MELISSA
7	4	Processed	700	501	AR		JENIFER
7	5	Processed	067	501	BA		JOYELL
7	6	Processed	072	523	BA		JORDAN
7	7	Processed	059	501	BA		ERICH
7	8	Suspend		502	BA		JAKE

Financial Aid > Awards > External Awards > Manage External Award Data

Where necessary, you can use this set of screens to make corrections to the student data; after making corrections, repeat the Load process.

Customize Find							
Student Information		Award	Status				
	Status	EmpID	National ID	Last Name	First Name	Date of Birth	
1	Processed	073	501	AD	KYLE		
2	Processed	071	502	AN	JAINEEN		
3	Processed	068	502	AN	MELISSA		
4	Processed	700	501	AR	JENIFER		
5	Processed	067	501	BA	JOYELL		
6	Processed	072	523	BA	JORDAN		
7	Processed	059	501	BA	ERICH		
8	Suspend	<input type="text"/>	<input type="text" value="502"/>	<input type="text" value="BA"/>	<input type="text" value="JAKE"/>	<input type="text"/>	

Because this process always posts awards as accepted, schools that routinely award State Grant as Offered until the student has signed and returned their acceptance letter may want to create a non-disbursing *Estimated State Grant* item type. That number should be entered on your State Grant item type as an auto-cancel.

When you receive a State Grant roster, break it into two rosters, one with students who have not accepted their award and one with students who have accepted their award. Award the first group of students the Estimated State Grant item type. Award the remaining students the State Grant award. The auto-cancel feature on the State Grant item type will cause it to cancel the Estimated State Grant item type; the new award will be sequenced immediately below the canceled award.

If batch packaging has already been done, recommend running Repackaging to reduce Need and/or COA over-awards. See separate Repackaging sections at the end of this document for Batch Repackaging or Individual Repackaging.

North Dakota University System
Campus Solutions – Financial Aid
External Awards

Reported Via Self Service

Set Up

Set Up SACR > Common Definitions > Self-Service Financial Aid > Self-Service Options

To allow students to report external aid through self-service, be sure to turn on access here.

Financial Aid > Awards > Self Service Awarding > Assign Self Service Access

Students need to be given access, once it is turned on for the institution. This can be done in batch here.

Self-service Security

Access can be granted individually at **Financial Aid > View Packaging Status Summary**

North Dakota University System
Campus Solutions – Financial Aid
External Awards

Procedure

Please review the UPK presentation at [http://upk.cnd.nodak.edu/PlayerPackage/tpc/0b78687f-a470-45a2-b4c4-70c49d2a233e/topic.html?su=mode=S/0026CTXEX=/0027PST8\\$PSFA\\$005FEA\\$005FSTAGE\\$005FSTDNT/0027](http://upk.cnd.nodak.edu/PlayerPackage/tpc/0b78687f-a470-45a2-b4c4-70c49d2a233e/topic.html?su=mode=S/0026CTXEX=/0027PST8$PSFA$005FEA$005FSTAGE$005FSTDNT/0027).

This is what a student sees; note that the link IS NOT available until after the student has awards.

need.

(14409, 521)

Last Updated: 02/13/2009 15:16:57 Status: New Package

Award	Category	Career	Offered	Accepted	Accept	Decline
Federal Sub Stafford Loan	Loan	Undergraduate	3,500.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
Federal Unsub Stafford Loan	Loan	Undergraduate	6,000.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
Federal Pell Grant	Grant	Undergraduate	1,641.00	1,641.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Total			11,141.00	1,641.00		

Currency used is US Dollar.

[accept all](#) [decline all](#) [clear all](#) [update totals](#)

[SUBMIT](#)

[Account Inquiry](#)

[Contact FA Office](#) [Consumer Information](#)

[Return to Aid Year Selection](#) [Report Other Financial Aid](#)

go to ...

Financial Aid

Aid from Other Sources

Federal Aid Year 2008-2009

Click the Report Additional Aid to add other aid that you expect to receive from sources such as private entities or state and local agencies.

No awards processed or pending.

[REPORT ADDITIONAL AID](#)

[Return to Award Package](#)

go to ...

North Dakota University System Campus Solutions – Financial Aid External Awards

What the student has available to select on this page is controlled in the setup, and may differ school by school. Awards designated for self-service on your setup will be available from a drop down.

If you don't designate an item for self help, the student can still enter a description to help you later match the award to an item type.

The text is available in a message catalogue (14409, 586) and can be modified as needed.

Financial Aid

Report Other Financial Aid

Enter the relevant information below. Click 'Add Another Award' to add more items to the list. All items you report are reviewed by a financial aid counselor. Click 'Save' when you are done.

*Award	*Type	Description	*Amount	
BOT MUSIC SCHOLARSHIP	Scholarship			delete
Other				
BOT MISCELLANEOUS SCHOL				
BOT MUSIC SCHOLARSHIP				
Dollars for Scholars				

* Required Field

Financial Aid

Report Other Financial Aid

Enter the relevant information below. Click 'Add Another Award' to add more items to the list. All items you report are reviewed by a financial aid counselor. Click 'Save' when you are done.

*Award	*Type	Description	*Amount	
Other	Scholarship	Dollars From Scholars	200	delete

Currency used is US Dollar.

* Required Field

[Return to List of Aid from Other Sources](#)

Financial Aid > Awards > External Awards > View Self Reported Aid

Start here to see self-reported, unprocessed external aid. Select Processing Status of *Reported*

View Self Reported Aid

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

Find an Existing Value

Academic Institution:

Aid Year:

Processing Status:

[Basic Search](#)

North Dakota University System Campus Solutions – Financial Aid External Awards

From the list that is presented, click on the EmplID blue link.

Self Reported Student List

Institution NDSU1 North Dakota State University
Aid Year 2009 Federal Aid Year 2008-2009
Status Reported

Customize Find	First	1 of 1	Last
EmplID	Name	Transaction Date	
080C	Azu:	02/13/2009	

On the EA Transaction tab of the resulting page, you can see the date the self-service activity took place.

External Awards Award Summary

ID:

Aid Year: 2009 Federal Aid Year 2008-2009 Institution: NDSU1

Aid Processing Status: Packaging Completed Load

Filter by

Type Source Processing Status

EA Transaction Award Status

Trans Nbr	Seq	Status	Date	Data Source	External Award Type	Source	Program
17	1	Reported	02/13/2009	Self Serve			

Main Content

On the Award tab, change the Status from *Reported* to *Unprocessed* and, if necessary, provide an item type for the award selected or described by the student.

Click on the *Detail* link if you want to customize the disbursement plan/split code, otherwise it will use the default set up on the FA Item Type.

External Awards Award Summary

ID:

Aid Year: 2009 Federal Aid Year 2008-2009 Institution: NDSU1

Aid Processing Status: Packaging Completed Load

Filter by

Type Source Processing Status

EA Transaction Award Status

Trans Nbr	Seq	Status	Item Type	Rel Item	Description	Fin Aid Type	Loan Cert	Amount	
17	1	Unprocessed	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	Dollars From Scholars	Scholarship	<input type="checkbox"/>	200.00	Detail

North Dakota University System Campus Solutions – Financial Aid External Awards

If you want to provide feedback to the student, go to the Status tab and click on the Comments blue link.

External Awards **Award Summary**

ID: _____

Aid Year: 2009 Federal Aid Year 2008-2009 Institution: NDSU1

Aid Processing Status: Packaging Completed Load

Filter by
 Type [] Source [] Processing Status [] Refresh

EA Transaction **Award** **Status** []

Trans Nbr	Seg	Status	*Entry Code	Date/Time Processed	Suspend Reason	Adjust Reason	Ineligible Code	
17	1	Unprocessed	Replace	02/13/2009 15:22				Comments

Note the second tab allows you to see the student's current award package.

External Awards **Award Summary**

ID: _____

Aid Year: 2009 Federal Aid Year 2008-2009 Institution: NDSU1

Student Aid Package

Nbr	Career	Item Type	Description	Category	Status	Offered	Accepted	Disb Plan	Split Code	
10	UGRD	900000001100	Federal Pell Grant	Grant	Accepted	1,641.00	1,641.00	01	XX	Disbursement
20	UGRD	910000002100	Federal Sub Stafford Loan	Loan	Offered	3,500.00	0.00	01	XX	Disbursement
30	UGRD	910000002200	Federal Unsub Stafford Loan	Loan	Offered	6,000.00	0.00	01	XX	Disbursement

Need Summary by Award Period

Award Period	Total Aid (Fed)	Unmet Need (Fed)	Overaward (Fed)	Total Aid (Inst)	Overaward (Inst)	Unmet Need (Inst)
Academic	11,141.00	3,607.00	0.00	0.00	0.00	16,190.00
Non Standard	0.00	0.00	0.00	0.00	0.00	0.00

Save Return to Search

When entering the comments, ensure you check the *Visible in Self Service* box.

Enter comments for this award

Transaction Nbr 17 Sequence Nbr 1

Award Type _____

Source _____

Program _____

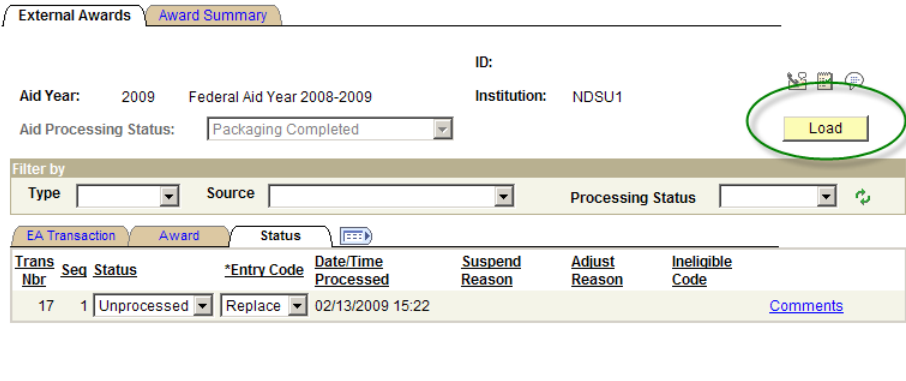
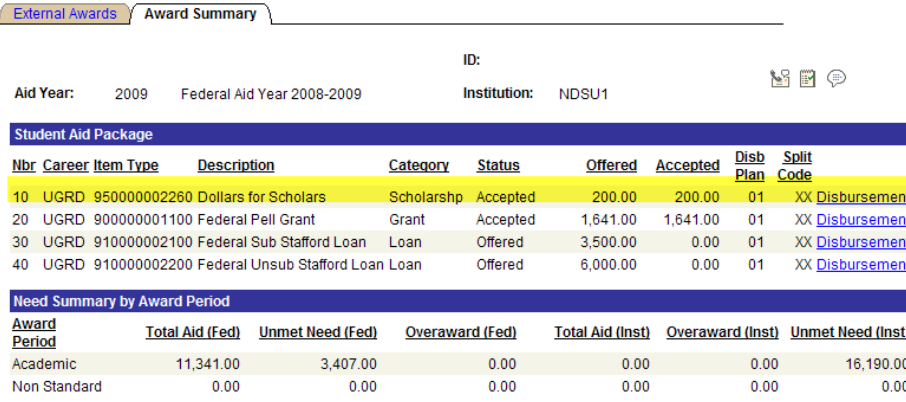

Item Type 950000002260 Amount 200.00

Description Dollars for Scholars

Comments: **Visible in Self Service**

Thank you for reporting your Dollars for Scholars scholarship

North Dakota University System Campus Solutions – Financial Aid External Awards

<p>Click the <i>Load</i> button.</p>	 <p>The screenshot shows the 'Award Summary' page for External Awards. At the top, there are tabs for 'External Awards' and 'Award Summary'. Below this, there are fields for 'Aid Year' (2009), 'Federal Aid Year' (2008-2009), 'Institution' (NDSU1), and 'Aid Processing Status' (Packaging Completed). A 'Load' button is circled in green. Below the filters, there are tabs for 'EA Transaction', 'Award', and 'Status'. A table shows one transaction with ID 17, status 'Unprocessed', and entry code 'Replace', processed on 02/13/2009 at 15:22.</p>																					
<p>Note the placement as the top item.</p> <p>You'll need to save the page before leaving.</p>	 <p>This screenshot shows the same 'Award Summary' page but with the 'Student Aid Package' table expanded. The table lists four items: a scholarship for \$200.00, a federal Pell grant for \$1,641.00, a federal sub-stafford loan for \$3,500.00, and a federal unsub-stafford loan for \$6,000.00. Below this is a 'Need Summary by Award Period' table.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Award Period</th> <th>Total Aid (Fed)</th> <th>Unmet Need (Fed)</th> <th>Overaward (Fed)</th> <th>Total Aid (Inst)</th> <th>Overaward (Inst)</th> <th>Unmet Need (Inst)</th> </tr> </thead> <tbody> <tr> <td>Academic</td> <td>11,341.00</td> <td>3,407.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>16,190.00</td> </tr> <tr> <td>Non Standard</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>	Award Period	Total Aid (Fed)	Unmet Need (Fed)	Overaward (Fed)	Total Aid (Inst)	Overaward (Inst)	Unmet Need (Inst)	Academic	11,341.00	3,407.00	0.00	0.00	0.00	16,190.00	Non Standard	0.00	0.00	0.00	0.00	0.00	0.00
Award Period	Total Aid (Fed)	Unmet Need (Fed)	Overaward (Fed)	Total Aid (Inst)	Overaward (Inst)	Unmet Need (Inst)																
Academic	11,341.00	3,407.00	0.00	0.00	0.00	16,190.00																
Non Standard	0.00	0.00	0.00	0.00	0.00	0.00																
<p>When the student returns to the <i>Report Additional Aid</i> portion of Self-Service, the previously entered award information is available as a link.</p> <p>The text is in a message catalogue (14409,584), and could be changed as needed.</p>	 <p>This screenshot shows the 'Financial Aid' page under 'Aid from Other Sources' for the Federal Aid Year 2008-2009. It lists one award: 'Dollars for Scholars' with an amount of 200.00 and a status of 'Processed'. A 'REPORT ADDITIONAL AID' button is visible at the bottom right.</p>																					

North Dakota University System
Campus Solutions – Financial Aid
External Awards

When the student clicks on the link, your message will be visible to them.

Aid from Other Sources

Award Detail

Award	Dollars for Scholars	Status	Processed
Amount	200.00	Date Reported	02/13/2009
		Date Processed	02/13/2009 15:34

Currency used is US Dollar.

This award is comprised of other aid reported as:	Amount
Dollars For Scholars	200.00

Messages

Thank you for reporting your Dollars for Scholars scholarship

[Return to List of Aid from Other Sources](#)

If batch packaging has already been done, recommend running Repackaging to reduce Need and/or COA over-awards. See separate Repackaging sections at the end of this document for Batch Repackaging or Individual Repackaging

North Dakota University System
Campus Solutions – Financial Aid
External Awards

From Student Financials

Set Up

Set Up SACR > Product Related > Student Financials > Item Types > Item Types																	
<p>In order to bring in internal awards from Student Financials, the External Awards tab of SF Item Types will need to be set up.</p> <p>Only payments, waivers and Third Party credits, can be set up.</p> <p>Many Student Financials Item Types may be mapped to one FA Item Type. The inverse is not true. For example, if there is only one “Athletic Scholarship” SF Item Types but multiple “Athletic Scholarship” FA Item Types, there is no way to map that.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; margin: 0;"> Initial Setup Amount Edits Miscellaneous External Awards Posting Restrictions Account Types GL Interface </p> <p>SetID: MISUB Item Type: 410000130000 Athletic Tuition Waiver</p> <hr/> <p> Find View All First ◀ 1 of 1 ▶ Last </p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Effective Date:</td> <td style="width: 30%;">07/01/2008</td> <td style="width: 30%;">Status:</td> <td style="width: 10%;">Active</td> </tr> <tr> <td>External Award Type:</td> <td><input type="text" value="WVR"/> 🔍</td> <td>Waiver</td> <td></td> </tr> <tr> <td>External Award Source:</td> <td><input type="text" value="SF"/> 🔍</td> <td>Student Financials</td> <td></td> </tr> <tr> <td>External Award Program Code:</td> <td><input type="text" value="ITW"/> 🔍</td> <td>Institutional Tuition Waiver</td> <td></td> </tr> </table> </div>	Effective Date:	07/01/2008	Status:	Active	External Award Type:	<input type="text" value="WVR"/> 🔍	Waiver		External Award Source:	<input type="text" value="SF"/> 🔍	Student Financials		External Award Program Code:	<input type="text" value="ITW"/> 🔍	Institutional Tuition Waiver	
Effective Date:	07/01/2008	Status:	Active														
External Award Type:	<input type="text" value="WVR"/> 🔍	Waiver															
External Award Source:	<input type="text" value="SF"/> 🔍	Student Financials															
External Award Program Code:	<input type="text" value="ITW"/> 🔍	Institutional Tuition Waiver															

Procedure

Financial Aid > Awards > External Awards > Process SF External Award																									
<p>This process finds payments, waivers, and third party credits associated with the financial aid item type or item group that you specify.</p> <p>Close coordination will be needed between the SFAO and business office to successfully set this up.</p> <p>Be sure to review the “Edit Prompts” each time you run this process.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="margin: 0;">SF External Award Feed</p> <p>Run Control ID: Process_SF_External_Award_dj Report Manager Process Monitor Run</p> <hr/> <p style="margin: 0;">Population Selection</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Selection Tool</td> <td style="width: 30%;"><input type="text" value="PS Query"/></td> <td style="width: 30%;">Edit Prompts</td> <td style="width: 10%;"></td> </tr> <tr> <td>Query Name</td> <td><input type="text" value="NDU_FA_SFEA"/></td> <td>Launch Query Manager</td> <td>Preview Selection Results</td> </tr> </table> <hr/> <p style="margin: 0;">Parameters</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Institution:</td> <td style="width: 30%;"><input type="text" value="MISUB"/></td> <td style="width: 30%;">Minot State Univ-Bottineau</td> <td style="width: 10%;"></td> </tr> <tr> <td>Aid Year:</td> <td><input type="text" value="2009"/></td> <td>Federal Aid Year 2008-2009</td> <td></td> </tr> <tr> <td><input type="radio"/> Report Items by Group</td> <td>Item Type Group:</td> <td><input type="text"/></td> <td></td> </tr> <tr> <td><input checked="" type="radio"/> Report Specific Items</td> <td>Item Type:</td> <td><input type="text" value="930000001100"/></td> <td>Diversity Waiver</td> </tr> </table> </div> <p style="margin-top: 10px;">If you select “Report Items by Group, the group to select is “FINAID”. Ensure that you enter the Institution, Aid Year and Academic Career in the <i>Edit Prompts</i></p>	Selection Tool	<input type="text" value="PS Query"/>	Edit Prompts		Query Name	<input type="text" value="NDU_FA_SFEA"/>	Launch Query Manager	Preview Selection Results	Institution:	<input type="text" value="MISUB"/>	Minot State Univ-Bottineau		Aid Year:	<input type="text" value="2009"/>	Federal Aid Year 2008-2009		<input type="radio"/> Report Items by Group	Item Type Group:	<input type="text"/>		<input checked="" type="radio"/> Report Specific Items	Item Type:	<input type="text" value="930000001100"/>	Diversity Waiver
Selection Tool	<input type="text" value="PS Query"/>	Edit Prompts																							
Query Name	<input type="text" value="NDU_FA_SFEA"/>	Launch Query Manager	Preview Selection Results																						
Institution:	<input type="text" value="MISUB"/>	Minot State Univ-Bottineau																							
Aid Year:	<input type="text" value="2009"/>	Federal Aid Year 2008-2009																							
<input type="radio"/> Report Items by Group	Item Type Group:	<input type="text"/>																							
<input checked="" type="radio"/> Report Specific Items	Item Type:	<input type="text" value="930000001100"/>	Diversity Waiver																						

North Dakota University System Campus Solutions – Financial Aid External Awards

Note that if only one term has been posted to Student Financials, only one term will be posted to Award Entry.

subpage.

Query Prompts

Academic Institution:

Aid Year:

Academic Career:

Financial Aid > Awards > External Awards > Manage External Award Data

The Manage External Award Data screen allows you to see who was selected by the process. You can change a student's status to "Skip" if you don't want them processed. You could also delete the row.

Manage External Award Data

Transaction Nbr 22 Date 03/10/2009
 Data Source SF Feed File Mapping
 File Name
 Student Count Award Total 0.00

From Row To Row Row Count 6

Student Information							Award	Status
Status	EmplID	National ID	Last Name	First Name	Date of Birth			
1	Unprocessed	066	Mel	Kadee				
2	Unprocessed	072	Kni	Shaun				

Financial Aid > Awards > External Awards > Load External Awards

Load External Awards

Run Control ID: Load_External_Awards_dj

[Report Manager](#) [Process Monitor](#)

Report Request Parameters

*Institution Minot State Univ-Bottineau

*Aid Year Federal Aid Year 2008-2009

*Status

Data Source

File Mapping ID

Transaction Date Transaction Nbr

Award Type Source Program Code

Update Aid Processing Status

Exclude

Load Processing Rule

Term Mismatch

Multi-Career

North Dakota University System
Campus Solutions – Financial Aid
External Awards

Financial Aid > Awards > External Awards > External Award Load Detail																																	
<p>The External Award Load Detail page shows you who was processed.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="margin: 0;">External Award Load Detail</p> <p style="margin: 0;">Process Instance 1555872</p> <p style="margin: 0;">Institution MISUB Minot State Univ-Bottineau Aid Year 2008 -2009</p> <hr/> <p style="margin: 0; text-align: right;">Find View All First 1 of 1 Last</p> <p style="margin: 0;">Transaction Nbr 18</p> <p style="margin: 0;">From Row <input type="text" value="1"/> To Row <input type="text" value="11"/> Row Count 11</p> <hr/> <p style="margin: 0; text-align: right;">Customize Find</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 0;"> <thead> <tr> <th style="text-align: left;">Trans Nbr</th> <th style="text-align: left;">Seg</th> <th style="text-align: left;">Status</th> <th style="text-align: left;">EmplID</th> <th style="text-align: left;">National ID</th> <th style="text-align: left;">Birthdate</th> <th style="text-align: left;">Last Name</th> <th style="text-align: left;">First Name</th> </tr> </thead> <tbody> <tr> <td>18</td> <td>2</td> <td>Processed</td> <td>0697</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>18</td> <td>3</td> <td>Processed</td> <td>0704</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>18</td> <td>4</td> <td>Processed</td> <td>0722</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div>	Trans Nbr	Seg	Status	EmplID	National ID	Birthdate	Last Name	First Name	18	2	Processed	0697					18	3	Processed	0704					18	4	Processed	0722				
Trans Nbr	Seg	Status	EmplID	National ID	Birthdate	Last Name	First Name																										
18	2	Processed	0697																														
18	3	Processed	0704																														
18	4	Processed	0722																														
Financial Aid > Awards > External Awards > Manage Student External Awards																																	
<p>You can also “load” awards individually from the Manage Student External Awards screen.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="margin: 0;">External Awards Award Summary</p> <hr/> <p style="margin: 0;">Sheena Strong ID: 0432156</p> <p style="margin: 0;">Aid Year: 2009 Federal Aid Year 2008-2009 Institution: MISUB</p> <p style="margin: 0;">Aid Processing Status: <input type="text" value="Repackage"/> <input type="button" value="Load"/></p> <hr/> <p style="margin: 0;">Filter by</p> <p style="margin: 0;">Type <input type="text"/> Source <input type="text"/> Processing Status <input type="text"/></p> <hr/> <p style="margin: 0;">EA Transaction Award Status</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 0;"> <thead> <tr> <th style="text-align: left;">Trans Nbr</th> <th style="text-align: left;">Seg</th> <th style="text-align: left;">Status</th> <th style="text-align: left;">Date</th> <th style="text-align: left;">Data Source</th> <th style="text-align: left;">External Award Type</th> <th style="text-align: left;">Source</th> <th style="text-align: left;">Program</th> </tr> </thead> <tbody> <tr> <td>18</td> <td>1</td> <td>Processed</td> <td>02/16/2009</td> <td>SF Feed</td> <td>Waiver</td> <td>School</td> <td>CDW</td> </tr> </tbody> </table> </div>	Trans Nbr	Seg	Status	Date	Data Source	External Award Type	Source	Program	18	1	Processed	02/16/2009	SF Feed	Waiver	School	CDW																
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18	1	Processed	02/16/2009	SF Feed	Waiver	School	CDW																										
<p>This is how the University of Michigan handles the problem of the fall award cancelling out the Spring disbursement:</p>	<ol style="list-style-type: none"> 1. Projected fall/spring award added to the student’s aid package (FAIT 01). 2. Actual fall award added to student’s aid package via SF EA (FAIT 02). Effective dated row added to FA setup to auto-cancel FAIT 01. 3. Load estimated spring award via File Parser on fall data (FAIT 03). FAIT 03 auto-cancels FAIT 01. 4. Actual spring award added to student’s aid package via SF EA (FAIT 02). Effective dated row added to FA setup to auto-cancel FAIT 03. 																																
<p>If batch packaging has already been done, recommend running Repackaging to reduce Need and/or COA over-awards. See separate Repackaging sections below for Batch Repackaging or Individual Repackaging.</p>																																	

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Batch Repackaging

Financial Aid > Awards > Repackaging > Select Students to Repackage																
<p>When creating this run control for the first time, click on the Edit Prompts link.</p> <p>Use equation RP_OVERAWARD</p>																
<p>Enter an “Operand” of A if you are running the process for Academic Year, or N for Non-Standard (AKA, Summer).</p>	<table border="1" style="margin-top: 10px;"> <thead> <tr> <th>Operand Global Var Name:</th> <th>Type</th> <th>Operand</th> </tr> </thead> <tbody> <tr> <td>AWARD_PERIOD</td> <td>String</td> <td>A</td> </tr> </tbody> </table>	Operand Global Var Name:	Type	Operand	AWARD_PERIOD	String	A									
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Financial Aid > Awards > Repackaging > View Selected Students																
<p>This screen shows which students have been selected for repackaging. You can prevent a student from being processed further by changing their status here to Invalid.</p>	<table border="1" style="margin-top: 10px;"> <thead> <tr> <th>ID</th> <th>Name</th> <th>Career</th> <th>Description</th> <th>Process Status</th> </tr> </thead> <tbody> <tr> <td>025</td> <td>GrL</td> <td>UGRD</td> <td>Undergraduate</td> <td>Invalid</td> </tr> <tr> <td>027</td> <td>Hel</td> <td>UGRD</td> <td>Undergraduate</td> <td>Valid</td> </tr> </tbody> </table>	ID	Name	Career	Description	Process Status	025	GrL	UGRD	Undergraduate	Invalid	027	Hel	UGRD	Undergraduate	Valid
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Financial Aid > Awards > Repackaging > Assign Repackaging Plans

Identify each career that you want to repackage and the appropriate Repackaging Plan.

Assign Repackaging Plan

Run Control ID: Assign_Students_Repackage_dj [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

Institution: Minot State Univ-Bottineau
 Aid Year: Federal Aid Year 2009 -2010
 Selection Definition:

Repackaging Plan Parameters

Career	Repackaging Plan	Sort Field	Sort Order
1 UGRD	DECREASE	FED_NEED	Ascending

Financial Aid > Awards > Repackaging > Process Batch Repackaging

Complete by running this process. Do pay attention to whether you are running in Live or Simulation mode.

Repackage Students in Batch

Run Control ID: Batch_Repackaging_dj [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

*Institution: Williston State College Live Simulation
 *Aid Year: Federal Aid Year 2008-2009
 *Selection Definition:

Financial Aid > Awards > Repackaging > View Repackaging Details

You can see what was done to each selected student by browsing this screen and noting the Message links on the Award Details tab.

[Eligibility and Need](#) **Award Detail**

Batch Number: 3785 Batch Date Time: 09/08/2008 08:26 Total Packaged: 219 [Next 25 Students](#)
 Institution: Minot State Univ-Bottineau Aid Year: 2008 -2009
 Repackaging Plan: Pell Only Repackaging Career: Undergraduate

Seq	ID	Name
5	0217852	Yoder, Carrie A

Nbr	Item Type	Description	Disb Plan	Split Code	Offered	Message
10	900000001100	FEDERAL PELL GRANT	01	01	1,381.00	Disbursement
20	910000002100	FEDERAL STAFFORD LOAN #1	01	01	3,500.00	Disbursement
30	910000002200	FEDERAL UNSUBSIDIZED LOAN #1	01	01	6,000.00	Disbursement
40	910000002600	SLND DEAL LOAN	01	01	3,021.00	Disbursement Message

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	<h3 style="margin: 0;">Batch Repackaging Message</h3> <p>Package Status: 9165</p> <hr style="border: 1px solid blue;"/> <p>Message: Manual Award reduced to be consistent with Financial Aid Need target</p>
--	--

Financial Aid > Awards > Award Processing > Assign Awards to a Student

Students that have been selected for repackaging will have a Repackaging Plan ID displayed on the award Entry screen.

This doesn't necessarily mean that the award package was adjusted, however!

Student Aid Package Need Summary Term Summary

Meier, Garrett Bernhard ID: 0399763

Aid Year: 2009 Federal Aid Year 2008 -2009 Institution: DSU01

Career: Undergrad Package Status:

Packaging Plan ID: Retrieve Aggregate Source:

Repackaging Plan ID: Repackage Award Period:

[Award Notification](#)
Validate Post Reset

Financial Aid > Awards > Generate Overaward Report

Some thoughts about repackaging: If you have manually entered a grant award (and it remains in "Locked" status) or entered it through Professional Judgment, then repackaging will respect your manual intervention and you will need to manually correct over-awards. You can run the Over-award Report to assist you with this.

Overaward Report

Run Control ID: Overaward_Report_dj [Report Manager](#) [Process Monitor](#)

Report Parameters

*Institution: Dickinson State University

*Aid Year: Federal Aid Year 2007 - 2008

*Academic Career: Undergraduate

*Award Period: Academic

Pkg Method (Blank for Both): Federal Methodology

As with any other award adjustments, if it's an originated loan you'll need to re-originate it; if it's been previously disbursed, you'll need to authorize and disburse the changed disbursement amount. For previously disbursed loans, you'll also need to return funds to the lender.

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Individual Repackaging

Financial Aid > Awards > Award Processing > Assign Awards to a Student																																																													
<p>Hit the Repackage button. Based on your setup, the process will attempt to find the appropriate plan and run it, although you may also use the look up feature to select the plan you want. If repackaging does anything, you will see a Message box next to the award that was adjusted. Clicking on it will provide a page with information concerning the adjustment.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; margin: 0;">Student Aid Package Need Summary Term Summary</p> <hr/> <p>He ID: 027 Aid Year: 2009 Federal Aid Year 2008 -2009 Institution: DSU01</p> <hr/> <p>Career: <input type="text" value="UGRD"/> Undergrad Package Status: <input type="text" value="Completed"/> Packaging Plan ID: <input type="text" value="UGRDALLFED"/> Aggregate Source: <input type="text" value="Default"/> Repackaging Plan ID: <input type="text" value="EXT AID"/> Award Period: <input type="text" value="Both"/></p> <p style="text-align: right;"> Award Notification <input type="button" value="Validate"/> <input type="button" value="Post"/> <input type="button" value="Reset"/> </p> <hr/> <p style="text-align: center;">Award Status</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>*Nbr</th> <th>Action</th> <th>Career</th> <th>Item Type</th> <th>Description</th> <th>Offered</th> <th>Accepted</th> <th>Disb Plan</th> <th>*Split Code</th> <th></th> </tr> </thead> <tbody> <tr> <td>10</td> <td><input type="checkbox"/></td> <td>UGRD</td> <td>900000001200</td> <td>North Dakota State Grant</td> <td>900.00</td> <td>900.00</td> <td>01</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>20</td> <td><input type="checkbox"/></td> <td>UGRD</td> <td>900000001100</td> <td>Federal Pell Grant</td> <td>4,731.00</td> <td>4,731.00</td> <td>01</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>30</td> <td><input type="checkbox"/></td> <td>UGRD</td> <td>910000002100</td> <td>Fed Subsidized Stafford Loan</td> <td>4,400.00</td> <td>4,400.00</td> <td>01</td> <td>01</td> <td>Disbursement Message +</td> </tr> <tr> <td>40</td> <td><input type="checkbox"/></td> <td>UGRD</td> <td>920000001000</td> <td>Federal Work Study</td> <td>0.00</td> <td>0.00</td> <td>01</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>50</td> <td><input type="checkbox"/></td> <td>UGRD</td> <td>910000002200</td> <td>Federal Unsubsidized Stafford</td> <td>3,333.00</td> <td>3,333.00</td> <td>01</td> <td>01</td> <td>Disbursement +</td> </tr> </tbody> </table> </div>	*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code		10	<input type="checkbox"/>	UGRD	900000001200	North Dakota State Grant	900.00	900.00	01	01	Disbursement +	20	<input type="checkbox"/>	UGRD	900000001100	Federal Pell Grant	4,731.00	4,731.00	01	01	Disbursement +	30	<input type="checkbox"/>	UGRD	910000002100	Fed Subsidized Stafford Loan	4,400.00	4,400.00	01	01	Disbursement Message +	40	<input type="checkbox"/>	UGRD	920000001000	Federal Work Study	0.00	0.00	01	01	Disbursement +	50	<input type="checkbox"/>	UGRD	910000002200	Federal Unsubsidized Stafford	3,333.00	3,333.00	01	01	Disbursement +
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