

# Satisfactory Academic Progress



## OVERVIEW

### 1) Review setup.

- a) Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress> Define Set Up Criteria
- b) Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress> Define Evaluation Terms
- c) NDU Applications > Financial Aid > Setup > NDU Sat Progress Extensions

### 2) AY Activate/FA Term (optional).

- a) Schools have the option to run Aid Year Activation in a batch process. Financial Aid > Aid Year Activation > Process Financial Aid Years.
- b) Select Equation Engine as Selection Tool, FAAYNDU\_ACTV as Equation Name. Click on the Edit Prompts link and complete the prompts. Be sure career (UGRD, GRAD) and institution are in all caps. You can then click on the Preview Selection Results to get the first 300 students the process will attempt to activate.

If this process is followed by FA Term Build, only students with actual enrollment will have FA Term built. By running these two processes, schools could ensure they were setting the selection criteria for the SAP Evaluation process.

### 3) Run process.

- a) Financial Aid > Satisfactory Academic Progress> Process SAP (suggest Report Only mode first time)
  - i) Remember, student must be Aid Year Activated and have an active FA to be evaluated.

### 4) Review report.

- a) Financial Aid >Satisfactory Academic Progress> Review Report Data
- b) OR run query NDU\_FA\_0034-SAP Report Listing

### 5) Run process in UPDATE mode.

- a) Financial Aid > Satisfactory Academic Progress> Process SAP

### 6) Create Letters-suggest completing all communication steps for one status at a time.

- a) Financial Aid> SAP> Create SAP Communications

**7) Review 3C Engine Trigger Results.**

- a) Campus Community> 3C Engine> 3C Engine Trigger Results
  - i) Delete any students you don't want to receive a letter.

**8) Run 3C Engine.**

- a) Campus Community> 3C Engine> Run 3C Engine
  - i) Be sure to check 3C Engine on the Process Scheduler Request

**9) Create Letters, merge files.**

- a) Campus Community> Communications> Letter Generation

**10) Queries to assist you:**

- a) NDU\_FA\_0034SAP Report Listing
- b) NDU\_FA\_0034\_1 Previously Suspended Review
- c) NDU\_FA\_0034\_2 Pass/Fail Students
- d) NDU\_FA\_0034\_3 SAP Disqualified with Awards
- e) NDU\_FA\_0034\_4 SAP Service Indicator Mismatch
- f) NDU\_FA\_0034\_5 Students Not Enrolled For Term
- g) NDU\_FA\_0034\_6 SAP Disqualified with FAFSA

**11) Review individual SAP evaluation/process exception.**

- a) Financial Aid> SAP>Maintain Student SAP Data
  - i) To process an exception, student must be Aid Year Activated and have an active FA Term for the exception term.

**Effective July 1, 2011, these standardized definitions must be used in the school's policy.**

**Financial aid warning:** a status assigned to a student who fails to make satisfactory academic progress at an institution that evaluates academic progress at the end of each payment period. 668.34(b)

- Optional, but only for schools that evaluate SAP at the end of each payment period
- May be granted automatically, without a written appeal from the student
- A student on financial aid warning may continue to receive Title IV aid for one payment period despite a determination that the student is not meeting SAP standards

**Financial aid probation:** a status assigned by an institution to a student who fails to make satisfactory academic progress and who has appealed and has had eligibility for aid reinstated. 668.34(b)

- Optional for all schools
- A school could require that a student on probation fulfill specific terms and conditions (e.g., taking a reduced course load, enrolling in specific courses, etc.)
- A student on financial aid probation may receive Title IV funds for one payment period. At that point, the student must meet the school's SAP standards or the requirements of the established individual academic plan to maintain Title IV eligibility (POS/Plan of Study).

#### Options for Schools That Evaluate SAP at the End of Each Payment Period

For the payment period following the payment period in which the student did not meet SAP standards, the school may choose to:

1. Place the student on financial aid warning and disburse Title IV funds to the student; or
2. Place the student on financial aid probation, following the prescribed appeal procedures, and disburse Title IV funds to the student.

It is the school's option to incorporate warning periods and/or probationary periods. A school is not required to use either option.

For the payment period following a payment period during which a student was on financial aid warning and still did not meet SAP standards, the school may choose to place the student on financial aid probation, following the prescribed appeal procedures, and disburse Title IV funds to the student.

For the payment period following a payment period during which a student was on financial aid probation, the school can disburse Title IV funds only if the student is meeting SAP standards or the school determines that the student met the requirements specified by the institution in the student's academic plan developed during the appeal process.

# SET UP

**Set Up**  
**SACR > Product**  
**Related >Financial**  
**Aid >Satisfactory**  
**Academic**  
**Progress>Define**  
**Set Up Criteria**

To update setup,  
insert a new  
effective date row  
and update the  
setup.

Setup   Criteria1   Criteria2   Exclusions   Communications and Checklists

Academic Institution: VCSU1 Valley City State University  
Academic Career: UGRD Undergraduate  
Set Up Activation: Active

SAP Setup Find | View All First 1 of 1 Last

\*Effective Date: 07/01/2006

SAP Process Type

\*SAP Process Type: Term

**REVISION  
07/01/2011**

Update the Severity Levels and SAP Status

Add a row and create the new statuses, POS and INFO.

Be sure to review the severity level, keeping in mind the assigned calculated status will be the highest severity.

The screenshot shows the SAP Setup interface. At the top, there is a search bar with 'Find | View All' and a page indicator 'First 1 of 5 Last'. Below this, the '\*Effective Date:' is set to '11/15/2011'. The 'SAP Process Type' section shows '\*SAP Process Type:' set to 'Term' and a red message: 'New SAP Calc Status and SAP Status. The SAP Status will display on Packaging Status Summary.' Below this is a table titled 'Status Codes' with columns: Calc Status, Severity, Short Description, Description, and SAP Status. The table contains 9 rows of status codes.

Calc Status	Severity	Short Description	Description	SAP Status
MEET	10	MEET	MEETS CRITERIA	Meets SAP
POS	20	POS	PLAN OF STUDY	Acad Plan
INFO	30	INFO	INFORMATION ONLY	Meets SAP
PROB	40	PROB	PROBATIONARY STATUS	Probation
UNDT	50	UNDETERMIN	UNDETERMINED	Undetmin
WARN	60	WARN	WARNING	Warning
ZERO	70	ZERO	ZERO UNITS EARNED	Not Meet
DISQ	80	DISQ	DISQUALIFIED	Not Meet
EF	90	EF	EXCEPTIONAL FAIL	Not Meet

Although Probation and POS (Plan of Study) should be used as an OVERRIDE Status only, it must be included in the Calc Status setup to be available for SAP Communications, Event ID and overrides.

**Default SAP Status**

The SAP evaluation process assigns these default statuses for particular cases, as described below. For each of these default statuses, select

The screenshot shows the 'Default SAP Status' configuration window. It lists five default status categories, each with a search box containing a status code:

- No Prior Academic History Default Status: MEET
- Undetermined Default Status: UNDT
- Career Pass Default Status: MEET
- Exception Fail Default Status: EF
- Zero Earned Units Default Stat: ZERO

a status code that you defined in the Status Codes group box.

**Statuses and Actions Rules**

The Statuses and Actions feature is always executed for the online process and is an option for batch.

Add combinations needed to meet your specific business needs.

**Statuses and Actions**

Use Statuses and Actions

▼ Statuses and Actions Rules [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-2 of 2 | [Last](#)

Previous SAP Status	Calc SAP Status	Final SAP Status		
WARN	WARN	DISQ	<a href="#">+</a>	<a href="#">-</a>
DISQ	WARN	DISQ	<a href="#">+</a>	<a href="#">-</a>

**1. Academic Standing Rules**

Optional (Note, not all schools use Academic Standing)

Use Academic Standing Test

▼ Academic Standing Rules [Find](#) | [View All](#) | [first](#) | 1-2 of 2 | [Last](#)

Academic Program	Academic Plan	Academic Standing	SAP Status		
<input type="text"/>	<input type="text"/>	DISM	DISQ	<a href="#">+</a>	<a href="#">-</a>
<input type="text"/>	<input type="text"/>	SUSP	DISQ	<a href="#">+</a>	<a href="#">-</a>

2. **Max Attempted Units Rules**

**WARNING! Be very careful not to uncheck Use Max Attempted Units Test. All data previously entered will be deleted.**

**REVISION 07/01/2011**

Determine at what point, if any, you want to notify students they are approaching the Maximum Attempted Units for their program.

**Maximum Attempted Units Test**

Use Max Attempted Units Test

Max Attempted Units Option

Transfer Unit Criteria:

Towards GPA

Course Credit

Other Credit

No GPA

Test Credit

TC Units Adjust

Max Attempted Units Rules Customize | Find | View 5 | First 1-100 of 117 Last

Academic Program	Academic Plan	Attempted Max Units From	Attempted Max Units To	SAP Status
UGAAM		76.660	84.170	WARN
UGAAM		84.180	91.490	INFO
UGAAM		91.500	999.000	DISQ

You might wish to delete the Warning line and update Probation to INFO. This will allow you to continue to use the test to inform students they are getting close to the Max.

Communications may need to be reviewed, updated as needed.

Per the Federal Student Aid Handbook , the law specifies that by the end of the second academic year (regardless of how many credits the student has accrued), the student must have a C average or its equivalent or have an academic standing consistent with the requirement for graduation from the program.

By requiring a range of Cumulative Earned Units the rule is not returning a correct evaluation of students who have reached the end of the second academic year. The number of Cumulative Earned Units does not equate to terms of enrollment. A case was submitted to PeopleSoft, the correction was installed in Production September 27, 2008 as the 8<sup>th</sup> SAP test, **Two Year GPA Test**.

**HECN-Campus Solutions suggests that the Two Year GPA Test be used to evaluate this qualitative requirement.** Although the Minimum Current GPA and Minimum Cumulative GPA Tests do not return an evaluation that can be used for Federal compliance for this qualitative measurement,

setup information for each test follows.

### 3. Minimum Current GPA Test

The Minimum Current GPA test determines the lowest current GPA that a student can have and still be eligible for financial aid.

#### Minimum Current GPA Test

Use Min Current GPA Test

Use Special GPA Code:

Minimum Current GPA Rules						
Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	Min Cur GPA From	Min Cur GPA To	SAP Status
<input type="text"/>	<input type="text"/>	0.000	999.000	0.000	0.000	DISQ

### 4. Minimum Cumulative GPA Test

The Minimum Cumulative GPA test determines the lowest cumulative GPA that a student can have and still be eligible for financial aid.

Use Min Cumulative GPA Test

Use Special GPA Code:

Minimum Cumulative GPA Rules						
Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	Minimum Cum GPA From	Minimum Cum GPA To	SAP Status
<input type="text"/>	<input type="text"/>	0.00	999.00	0.000	1.990	DISQ

**5. Two Year GPA Test**

The Two Year GPA test determines the lowest cumulative GPA that a student can have and still be eligible for financial aid.


**Two Year GPA Test**

Use Two Year GPA Test

Use Special GPA Code:

Two Year GPA Rules Customize | Find | View All | First 1-4 of 4

Academic Program	Academic Plan	Terms From	Terms To	Cum GPA From	Cum GPA To	SAP Status
<input type="text"/>	<input type="text"/>	1	1	0.000	1.500	INFO
<input type="text"/>	<input type="text"/>	2	2	0.000	1.750	INFO
<input type="text"/>	<input type="text"/>	3	3	0.000	1.999	WARN
<input type="text"/>	<input type="text"/>	4	99	0.000	1.999	DISQ



**6. Cumulative Earned Units Test Updated (Bundle #9, 09/2008).**

For the Cumulative Earned Units test, define the percent or minimum number of units a student must complete of attempted units per term.

**Cumulative Earned Units Test**

Use Cumulative Earned Units Test

Cumulative Earned Units Options

Use Percentage

Cumulative Attempted Transfer Unit Criteria:

- Towards GPA
- Course Credit
- Other Credit
- No GPA
- Test Credit
- TC Units Adjust

Cumulative Earned Transfer Unit Criteria:

- Towards GPA
- Course Credit
- Other Credit
- No GPA
- Test Credit
- TC Units Adjust

Cumulative Earned Units Rules Customize | Find | View All | First 1 of 1 Last

Academic Program	Academic Plan	Cum Attempted Units From	Cum Attempted Units To	Cumulative Earned Units % From	Cumulative Earned Units % To	SAP Status
<input type="text"/>	<input type="text"/>	0.000	999.000	0.00	66.66	WARN

**7a. Optional Exclusions Setup**

Courses entered here will be excluded from ALL SAP tests you have setup.

**7b. Award Exclusions**

exclude students from an SAP evaluation based on an aid type or specific awards.

Note: If the only aid a student received is in the excluded range, they will NOT be selected for SAP evaluation.

Source	Fin Aid Type	Item Type From	Item Type To
	Grant	900000010000	900000010701
	Scholarshp	950000010000	950000035060
	Scholarshp	960000010010	960000010101

**7c. Grade Exclusions**

**Expanded Explanation (Bundle #9, 09/2008)**

Grade Exclusions are criteria for excluding course units with specific grading schemes, grading basis, and grade input values from the Current Earned Unit and/or Cumulative Earned Units tests.

If you use Grade Exclusions, the Current and Cumulative Earned Units values will be derived from the student's enrollment, minus the units to be excluded. If you do not use Grade Exclusions, the Current and/or Cumulative Units value will be derived from the student's Career Term data.

You must set up any and all course grades that you do not want to be counted toward earned units,

## Grade Exclusions

Use Grade Exclusions

Grade Exclusions			Customize	Find	View All	First	1 of 1	Last
Grading Scheme	*Grading Basis	Grade Input						
<input type="text"/>	<input type="text"/>	<input type="text"/>	+ -					

## Communications and Event ID

If you want to notify students they are close to Max Credits or have a low GPA, but are still eligible for FA, use the new status INFO in your setup. This will be used in conjunction with new Event ID and Letter Codes.

SAP Setup		Find	View All	First	1 of 3	Last
Effective Date: 07/03/2006						
Events		Find	View All	First	1-4 of 4	Last
SAP Status	Event ID					
<input type="text" value="DISQ"/>	<input type="text" value="FA_SAPDSQ"/>	+ -				
<input type="text" value="INFO"/>	<input type="text" value="FA_SAPINFO"/>	+ -				
<input type="text" value="PROB"/>	<input type="text" value="FA_SAPPROB"/>	+ -				
<input type="text" value="WARN"/>	<input type="text" value="FA_SAPWARN"/>	+ -				

**8. Set up Comment ID's for all of the tests you have set up.**

The text in the description will be printed on the student's letter.

Highlighted text in example is hardcoded and **MUST BE EXACT.**

This is optional; use this only if you want the calculated figure to be listed in the student's letter.

Comment ID	Description		
Max Attempted Units	You have attempted <b>MAXATTU</b> credits. You must complete you	+	-
Min Current GPA	Your semester grade point average is <b>MINCURGP</b> . This does	+	-
Current Earned Units	You have earned <b>CUPERNU</b> % of hours attempted for the sem	+	-
Cumulative Earned Units	You have earned <b>CUMERNU</b> % of hours attempted. This does	+	-
Two Year GPA	Your GPA, <b>TWOYRGPA</b> , does not meet the minimum requirem	+	-

## 9. SAP Extensions

a. Update SAP Extensions if you will be using the new option for students enrolled in all P/F courses.

**b. Set Counselor Review on Return From** If neither box is checked, the option is turned off.

**c. Restrict Review to Terms** If neither box is checked, counselor review will be applied to all terms, including summer.

## Satisfactory Progress Extensions

Bismarck State College

FA Census Date Offset:


Include Terms Currently Withdrawn
















Suppress Current GPA Test When No Courses Included

Set Counselor Review on Return from Not Met Status::

Restrict Review to Terms:  Fall Only  Spring Only

Apply Review / Service Indicators From:  Batch  On-Line

\*DeptID:  

	*SAP Status	*Srv Ind Cd	*Srvc Reasn		
1	DISQ 	FSS 	SATP 	<input type="button" value="+"/>	<input type="button" value="-"/>
2	INFO 	FIF 	SATP 	<input type="button" value="+"/>	<input type="button" value="-"/>
3	POS 	POS 	SATP 	<input type="button" value="+"/>	<input type="button" value="-"/>
4	PROB 	FSP 	SATP 	<input type="button" value="+"/>	<input type="button" value="-"/>
5	WARN 	FSW 	SATP 	<input type="button" value="+"/>	<input type="button" value="-"/>

**d. Apply Review/Service Indicators From:** Campus Solutions recommends selecting both Batch and On-Line

**REVISION 12/01/2011**

**e. Service Indicator Assignment:** Add a row for each status that the school wants to apply a service indicator for. If this grid is left entirely blank, the service indicator option is turned off. **Add new FIF SAP Status/Indicator.**

**Staff will need security to add/remove the new FIF Service Indicator. Please work with your Campus Access Control Office for access.**

**Define Evaluation Terms.**

Add new terms as necessary.

\*Term:  2007 Fall + -

Evaluation Terms		Find	First	1-10 of 10	Last
1	<input type="text" value="0510"/> 2004 Fall				
2	<input type="text" value="0530"/> 2005 Spring				
3	<input type="text" value="0540"/> 2005 Summer				
4	<input type="text" value="0610"/> 2005 Fall				
5	<input type="text" value="0630"/> 2006 Spring				
6	<input type="text" value="0640"/> 2006 Summer				
7	<input type="text" value="0710"/> 2006 Fall				
8	<input type="text" value="0730"/> 2007 Spring				
9	<input type="text" value="0740"/> 2007 Summer				
10	<input type="text" value="0810"/> 2007 Fall				

# PROCESS

## Process SAP

Financial  
Aid>Satisfactory  
Academic  
Progress>Process  
SAP

Suggest Report  
Only the first time  
to allow you to  
review the data  
before posting to  
student's record.

## Process SAP

Run Control ID: SAP\_Process\_sma

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

Run

### Population Selection

Population Selection

### Input Parameters

\*Academic Institution:   Bismarck State College

\*Academic Career:   Undergraduate

Term:   2010 Fall

Selection Criteria:

\*Processing Option:

Skip Status and Actions

Don't Run If SAP Status Exists

**Review Report Data**  
**Financial Aid > SAP > Review Report Data**  
 Or run query **NDU\_FA\_0034**  
**SAP Report Listing**

**Review Report Data**

Run Control ID: SAP\_Process\_sma      User: sapplegren

---

Institution: BSC01  
 Career: UGRD  
 Term: 1110

Run Date and Time: 06/21/11 2:51:24PM

Customize | Find | View 100 | First 1-50 of 2647 | Last

Student Data   Acad Standing   Max Units   Max Terms   Min Current GPA   Min Cumulative GPA   Current Units

ID	Name	Institution	Career	Term	Program	Plan	Calc SAP Status	Override SAP Status
1		BSC01	UGRD	1110	UGLAT	AA-LAT	DISQ	
2		BSC01	UGRD	1110	UGLAT	AA-LAT	DISQ	
3		BSC01	UGRD	1110	UGCMJ	AAS-CMJ	WARN	
4		BSC01	UGRD	1110	UGAAM	AAS-AAM	WARN	
5		BSC01	UGRD	1110	UGLAT	AA-LAT	MEET	
6		BSC01	UGRD	1110	UGHSR	AAS-HSR	DISQ	POS
7		BSC01	UGRD	1110	UGAAL	AAS-AAL	MEET	

Review and update Student Satisfactory Academic Progress Details. Use overrides for selected students

**Financial Aid > SAP > Maintain Student SAP Data**

Favorites   Main Menu > Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

Student SAP   Career Exceptions   Term Exceptions

ID: ~~XXXXXXXXXXXXXXXXXXXX~~      Institution: DSU01   Dickinson State University

Career: UGRD   Undergraduate      Term:           

**Student SAP**      Find | View All      First 1 of 2      Last

Term: 0930      2009 Spring      [Packaging Status Summary](#)      Meets SAP

Program: UGHRM      Human Resource Management

Plan: CERT-HRM      Cert - Human Resource Mgmt

Calc SAP Status: MEET      MEETS CRITERIA

Override SAP Status:       Updated:      User ID:

Comments:

SAP Calculation Results									
Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	N		N/A	N/A	<input type="checkbox"/>			N/A	
Max Attempted Units:	Y	52.670			<input type="checkbox"/>	MEET	20	N	N/A
Max Attempted Terms:	Y	3.000	0	99	<input checked="" type="checkbox"/>	MEET	20	N	N/A
Min Current GPA:	Y	4.000			<input type="checkbox"/>	MEET	20	N	N/A
Min Cumulative GPA:	N	3.538			<input type="checkbox"/>			N	N/A
Current Earned Units:	Y	4.000			<input type="checkbox"/>	MEET	20	N	N/A
Cumulative Earned Units:	Y	52.670			<input type="checkbox"/>	MEET	20	N	N/A
Two Year GPA:	Y	3.538			<input type="checkbox"/>	MEET	20	N	N/A

SAP Calculation Data			
Current Units Attempted:	4.000	Cumulative Units Attempted:	52.670
Two Year Nbr of Terms:	3		

Processing Information	
Process User Id:	SFA_SAP_BDRV
Process Date/Time:	06/01/09 3:42:46PM
Processing Message:	Statistics Calc Pass 1, Term 0930

FA Staff are able to access the SAP Student Data page for all students with FA Term built, which allows for online SAP calculation for an individual student. Students must be Aid Year activated and have an active row in FA Term for the term that is being processed. **If there is not an active row, the process executes but returns a blank page, or, if there is a previous status, the existing page data is displayed.**

This page displays the SAP status code and all the calculation results used to determine a student's SAP status code.

The Aid Year or Term field is displayed depending on the setup criteria. Enter the aid year or term to process for the SAP online process.

Click the Calc SAP button to run the SAP process for an individual. An Active FA Term record must exist for the aid year or term being processed. After processing, the SAP Calculation Results, SAP Calculation Data, and Processing Information group boxes are populated.

### Student SAP

**Aid Year or Term**      The aid year or term used in the SAP online or batch calculation. If the batch process calculated the data, this is the aid

year or term used on the run control for that batch run.

**Packaging Status Summary**

Link and current SAP status. Click the link to view the Satisfactory Academic Progress field on the Packaging Status Summary page. This page is shown at the end of this list of fields.

**Program**

The academic program from FA Term that was used to determine SAP status.

**Plan**

The academic plan from FA Term that was used to determine SAP status.

**Calc SAP Status**

(calculated SAP status)

The calculated SAP status that controls the value in the SAP field on the Packaging Status Summary page. To access this page, click the Packaging Status Summary link.

**Override SAP Status**

If populated, this status overrides the value in the Calc Sap Status field and controls the Satisfactory Academic Progress field on the Packaging Status Summary page. Delete the override status before running the process after the fully graded date.

**Updated**

This date is populated if an override is placed on the student's SAP record.

**Userid**

The user ID of the person who applied the override.

**Comment**

A comment can be placed in this field to provide additional information on a student's SAP. Use the comment field when you override a student's SAP Status.

**SAP Calculation Results**

**Used**

Y indicates that this test was used to determine SAP status and N indicates this test was not used.

**Actual**

The calculated value is populated for any test that is used. This is the value that is used in the rule comparison.

**Rule Range From**

If the student failed this test, the rule displays in the lower end of the failed range. Academic standing does not use ranges and there is no value for the Academic Standing Test row.

**Rule Range To**

If the student failed this test, the rule displays in the upper end of the failed range. Academic standing does not use ranges and there is no value for the Academic Standing Test row.

**Failed**

If checked, a failure occurred for this test.

**Status**

The calculated status for each test.

**Severity**

Severity of the SAP status. The status with the highest severity is used to populate the Calc SAP Status field.

**Exception Used** Y or N is displayed to indicate whether or not there was an exception used.

**Term** Term used to evaluate academic standing from Student Records. Only displays for the Academic Standing test.

### **SAP Calculation Data**

**Current Units Attempted** The number of units the student is attempting for the evaluation term or aid year terms. This is used in the Current Earned Units test.

**Cumulative Units Attempted** The cumulative number of units the student attempted up to and including the units for the term or terms in the aid year being evaluated. This is used in the Cumulative Earned Units test.

### **Processing Information**

**Process Userid** User ID of the person who ran the batch process.

**Process Date/Time** Date and time when the process was run.

**Processing Message:** The message identifies the source of the status code:  
Default SAP Status. The status assigned to students who pass all of the selected tests.  
Statistics Calc Pass 1, Term XXX. Calculated status from the evaluation term or max term in an aid year.  
Statistics Calc Pass 2, Term XXX. Calculated status from the latest (max) term on the student's record.

From the Student SAP page, click the Packaging Status Summary link to view the Satisfactory Academic Progress field on the Packaging Status Summary page.

## Defining Student-Specific Career Exceptions

This page is for student-specific career rules, rewriting the rule at the student level for the Effective Date and Status control when the student-specific career rule is applied. If any career rules fail when processing, the Exception Failure Default Status is applied and the exception flag is set to Y for the test using the exception.

The screenshot shows a web application interface for defining career exceptions. At the top, there are three tabs: 'Student SAP', 'Career Exceptions' (highlighted in yellow), and 'Term Exceptions'. Below the tabs, the student's information is displayed: ID: FASAP0001 Smith, MaryLou; Institution: PSUNV PeopleSoft University; Career: UGRD Undergraduate; Term: [empty] with a 'Calc SAP' button. The main section is titled 'Career Exceptions' and contains several fields: Effective Date: 06/07/2011; \*Status: Active; Attempted Max Units: [empty]; Attempted Max Terms: [empty]; Min Cumulative GPA: [empty]; Cum Earned Units %: [empty]; Cum Earned Units: [empty]; Cum Att Units to Exclude: [empty] (highlighted with a red box); Two Year GPA: [empty]; Terms From: [empty]; Terms To: [empty]; Comments: [empty]. Below this is an 'Audit Information' section with fields for Last Update Userid and Last Update Date/Time.

The SAP status assigned for any career exception failure is the Exception Fail Default Status.

### **NEW November 2011**

Enter the total number of CUMULATIVE attempted units to exclude from the calculation. This will impact the 2/3's calculation.

## Defining Student-Specific Term Exceptions

The Aid Year Exceptions page and the Term Exceptions page are the same except for specifying aid year or term. Which page is displayed depends on the process type set up for the institution and career for the particular student.

Access the Term Exceptions page.

This page is for student-specific term rules and displays for all careers set for term processing. The rules apply only to the specific term entered.

Student SAP Career Exceptions **Term Exceptions**

ID: FASAP0001 Smith, MaryLou Institution: PSUNV PeopleSoft University  
Career: UGRD Undergraduate Term:

**Term Exceptions** Find | View All First 1 of 1 Last

\*Term:

Override Academic Standing

Min Cumulative GPA:

Min Current GPA:

Cur Earned Units %:

Cur Earned Units:

**Cur Att Units to Exclude:**

Two Year GPA:  Terms From:  Terms To:

Comments:

**Audit Information**

Last Update UserId:

Last Update Date/Time:

**The SAP status assigned for any career exception failure is the Exception Fail Default Status.**

### **NEW November 2011**

Enter the total number of CURRENT attempted units to exclude from the calculation. This will impact the 2/3's calculation.

**\*ADDITIONAL INFORMATION REGARDING SAP and CONVERSION CREDITS**

Research into how the PS 9 Satisfactory Progress process works has uncovered an issue involving how the process counts units for Max Attempt and Attempt/Complete evaluations. The new process includes options to exclude units by course, grade basis, and whether or not to include transfer credits as well as some other options. The exclusions work for units earned at the current school; they are not applied to transfer units. The assumption is that the total transfer units were adjusted for excluded courses, repeats, etc. at the time the transfer records were accepted and the total transfer units are simply added when this option is selected.

For 9 of our campuses, legacy data was imported to Peoplesoft as an internal transfer. There is no Enrollment Table data for these courses that can be used to execute the Sat Progress exclusion options. (Mayville and Valley City did a full conversion and will not have this issue)

What this means for the user community is the following:

If the school opts to include transfer credits, our legacy modification will add in the attempted units that were bypassed by the internal transfer, and the PS 9 Sat Progress process will include the accepted legacy credits as transfer credits. This is essentially the same way our previous (PS 8) custom process worked, and should yield correct results.

However, should a school opt not to include transfer credits, the validated legacy data will be excluded also. The best our legacy modification can do at this point is to add the total attempted and completed units brought over from legacy. It is not practical to attempt to apply the course exclusions, course repeat exclusions, etc. Legacy transfer data may not be sufficient for this to be done with complete accuracy.

**SAP COMMUNICATIONS**  
To assist with duplicate communication issues, beginning December 2010, Campus Solutions will update the

Fall	August 15-1st day of Spring Term			
Spring	2nd Day of Spring Classes to 1st day of Summer Term			
Summer	2nd Day of Summer Classes to 1st day of Fall Term			
SAP Letter Code/Description				
_LJ FALL Disqualified	_LT SPRING Disq	_LW SUMMER Disq	_NA FALL Info	
_LR FALL Probation	_LU SPRING Probation	_LX SUMMER Prob	_NB SPRING Info	



The Create SAP Communications process populates the 3C Engine. To review the letters BEFORE you print them, go to [Campus Community>3C Engine>3C Engine Trigger Results](#)

Favorites Main Menu > Campus Community > 3C Engine > 3C Engine Trigger Results

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

**Find an Existing Value**

Limit the number of results to (up to 300):

Academic Institution:

Event ID:

Description:

Administrative Function:

Case Sensitive

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

**Search Results**

View All First 1-5 of 5 Last

Academic Institution	Event ID	Description	Administrative Function
<a href="#">MISUB</a>	<a href="#">FA SAPDSQ</a>	<a href="#">FA SAP Disqualified</a>	<a href="#">FINA</a>
<a href="#">MISUB</a>	<a href="#">FA_SAPINFO</a>	<a href="#">FA SAP Information Only</a>	<a href="#">FINA</a>
<a href="#">MISUB</a>	<a href="#">FA_SAPPROB</a>	<a href="#">FA SAP Probation</a>	<a href="#">FINA</a>
<a href="#">MISUB</a>	<a href="#">FA_SAPWARN</a>	<a href="#">FA SAP Warning</a>	<a href="#">FINA</a>

**Tab one**

Find | View 100 | First 1-195 of 195 Last

Trigger Detail 1 Trigger Detail 2

*ID Type	*ID	Name	*Trigger Status	Function	Variable Data	*Date Added
1 Person		Tlougan, Stephen Daniel	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008
2 Person		Unrein, Kelli Michelle	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008
3 Person		Johnson Jr, Raymond Maurice	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008
4 Person		Code, Andrew	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008
5 Person		Evanson, Rachel E	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008
6 Person		Leitner, Phillip J	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008
7 Person		Justin, Frank James	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008
8 Person		Nustad, Scott Michael	Processed	FINA Fin Aid	<a href="#">Variable Data</a>	09/19/2008

Note the comments on tab two.

*Trigger Source	*User ID	Assign ID	Name	Print Comment	Comments	Process Name
1 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	Your cumulative GPA	SFA_SAP_3C
2 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	Your semester GPA is	SFA_SAP_3C
3 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	Your cumulative GPA is	SFA_SAP_3C
4 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	Your cumulative GPA is	SFA_SAP_3C
5 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	Your cumulative GPA	SFA_SAP_3C
6 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	You have attempted 220	SFA_SAP_3C
7 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	You have attempted 192	SFA_SAP_3C
8 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	You have attempted	SFA_SAP_3C
9 Batch	sapplegrei	0601529	Applegren,Susan Marie	<input checked="" type="checkbox"/>	Your semester GPA is	SFA_SAP_3C

**Campus Community > 3C Engine > Run 3C Engine**

RUN 3C ENGINE for each type of evaluation status that your institution uses:  
Warning  
Probation  
Disqualified  
Info

3C Engine Parameters [Manage Duplicate Assignment](#)

Run Control ID: 3C\_Engine\_sma [Report Manager](#) [Process Monitor](#) [Run](#)

<b>Process 3Cs</b> <input type="checkbox"/> Population Selection <input checked="" type="checkbox"/> Trigger Table <input type="checkbox"/> Mass Change	<b>Process Joint Records</b> <input checked="" type="radio"/> No <input type="radio"/> Yes, all Joint IDs <input type="radio"/> Yes, if match exists
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**Event Selection**

Academic Institution:  N.Dakota State College Science  
 Administrative Function:  Financial Aid  
 Event ID:  FA Sat Prog Disqualified [Detail](#)

**Communication Key**

SSAPDSQ FA Sat Acad Prog Disqualified

**Checklist Code**

SAPDSQ FA Sat Acad Prog Disqualified

**Checklist Item**

100 SAPDSQ SAP Disqualified

**Comment Category**

Be sure to check 3C Engine on the Process Scheduler Request.

Run Letter Gen to create csv and dat files. Merge as usual.

### Process Scheduler Request

User ID:  Run Control ID:

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Server Name:  Run Date:

Recurrence:  Run Time:

Time Zone:

#### Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	3C ENGINE	3CENGINE	Application Engine	Web	TXT	<a href="#">Distribution</a>
<input type="checkbox"/>	<a href="#">3C Engine Trigger Batch Job</a>	ND_3CENG	PSJob	(None)	(None)	<a href="#">Distribution</a>

### MANUAL OVERRIDES

If the Override SAP Status is populated, this status overrides the value in the Calc SAP Status field and controls the SAP field on the Packaging Status Summary (PSS) page. Additional Information Regarding Overrides

Overrides/Exceptions entered either tab 1-Student SAP or Tab 3-Term Exceptions WILL NOT CARRY FORWARD TO SUBSEQUENT TERMS.

Exceptions entered on the 2nd tab-Career Exceptions-do stay in place when evaluating subsequent terms.

Overrides entered on either tab 1-Student SAP or Tab 3-Term Exceptions will be tied to that term. Subsequent terms evaluation will update PSS as per the terms Calculated SAP Status.

IMPORTANT: If you go back and calc a previous term that has an override entered on it, PSS WILL update to the override status. This will also be the PSS status that shows on the most recent terms evaluation.

The OVERRIDE STATUS will be listed on the query NDU\_FA\_0034 SAP Report Listing.

**Set Up SACR>**  
**Product Related>**  
**Financial Aid>**  
**Satisfactory**  
**Academic**  
**Progress> Define**  
**Evaluation Terms**

Review setup for  
 Aid Year and  
 Evaluation Terms.

The Terms that  
 you want to calc  
 must be set up.

Add terms as  
 needed.

\*Term: 1130 2011 Spring

Evaluation Terms		Customize	Find	First	1-23	23	Last
1	0410	2003 Fall					
2	0430	2004 Spring					
3	0440	2004 Summer					
4	0510	2004 Fall					
5	0530	2005 Spring					
6	0540	2005 Summer					
7	0610	2005 Fall					
8	0630	2006 Spring					
9	0640	2006 Summer					
10	0710	2006 Fall					
11	0730	2007 Spring					
12	0740	2007 Summer					
13	0810	2007 Fall					
14	0830	2008 Spring					
15	0840	2008 Summer					
16	0910	2008 Fall					
17	0930	2009 Spring					
18	0940	2009 Summer					
19	1010	2009 Fall					
20	1030	2010 Spring					
21	1040	2010 Summer					
22	1110	2010 Fall					
23	1130	2011 Spring					

**Financial Aid>**  
**SAP > Maintain**  
**Student SAP Data**

Retrieve Student-  
 note the Term  
 that displays is  
 term the latest  
 SAP evaluation  
 was processed.

Student SAP **Career Exceptions** **Term Exceptions**

ID: 0050062 Morlock,Kayla Institution: BSC01 Bismarck State College  
 Career: UGRD Undergraduate Term:  **Calc SAP**

Student SAP Find | View All First 1 of 1 Last

Term: 0810 2007 Fall [Packaging Status Summary](#) Not Meet  
 Program: UGMNG Management  
 Plan: AAS-MNG AAS Management  
 Calc SAP Status: DISQ DISQUALIFIED  
 Override SAP Status:  Updated:   
 User ID:   
 Comments:

SAP Calculation Results									
Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	N		N/A	N/A	<input type="checkbox"/>			N/A	
Max Attempted Units:	Y	91.00	90.00	999.00	<input checked="" type="checkbox"/>	DISQ	90	N	N/A
Max Attempted Terms:	N				<input type="checkbox"/>			N	N/A
Min Current GPA:	N				<input type="checkbox"/>			N	N/A
Min Cumulative GPA:	Y	2.304			<input type="checkbox"/>	MEET	20	N	N/A
Current Earned Units:	N				<input type="checkbox"/>			N	N/A
Cumulative Earned Units:	Y	67.000			<input type="checkbox"/>	MEET	20	N	N/A

SAP Calculation Data

Current Units Attempted: Cumulative Units Attempted: 91.000

Processing Information

Process User Id: SFA\_SAP\_BDRV  
 Process Date/Time: 06/12/08 1:54:08PM  
 Processing Message: Statistics Calc Pass 1, Term 0810

To update AY Packaging Status Summary, you must enter a term in that academic year. In this example to update 2009 AY, 0910 is used.

1. Enter the desired Override SAP Status
2. Enter the Term
3. Press CALC SAP
4. Save

Remember, student must be Aid Year Activated and have an active FA Term in the AY you want to update

Student SAP Career Exceptions Term Exceptions

ID: 0051823 Hendrickson,Megan Cecilia Institution: MISUB Minot State Univ-Bottineau  
 Career: UGRD Undergraduate Term: 0910 Calc SAP

Student SAP Find | View All First 1 of 2 Last

Term: 0810 2007 Fall Packaging Status Summary Not Meet  
 Program: UGNUR Practical Nursing  
 Plan: CERT-NUR CERT-Practical Nurse  
 Calc SAP Status: 1. DISQ DISQUALIFIED  
 Override SAP Status: 2. PROBQ PROBATIONARY STATUS Updated:  
 User ID:

Comments:

Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	N		N/A	N/A	<input type="checkbox"/>			N/A	
Max Attempted Units:	Y	84.00	76.86	84.17	<input checked="" type="checkbox"/>	WARN	50	N	N/A
Max Attempted Terms:	Y	1.000	0	85	<input checked="" type="checkbox"/>	MEET	20	N	N/A
Min Current GPA:	Y	0.000	0.000	1.999	<input checked="" type="checkbox"/>	DISQ	90	N	N/A
Min Cumulative GPA:	Y	2.500			<input type="checkbox"/>	MEET	20	N	N/A
Current Earned Units:	N				<input type="checkbox"/>			N	N/A
Cumulative Earned Units:	N				<input type="checkbox"/>			N	N/A

SAP Calculation Data

Current Units Attempted: Cumulative Units Attempted:

Processing Information

Process User Id: sapplegren  
 Process DateTime: 06/13/08 10:26:28AM  
 Processing Message: Statistics Calc Pass 1, Term 0810

4. Save Return to Search Update/Display Include History Correct H

Packaging Status  
Summary has  
updated.

Student SAP Career Exceptions Term Exceptions

ID: 0051823 Hendrickson,Megan Cecilia Institution: MISUB Minot State Univ-Bottineau  
 Career: UGRD Undergraduate Term: 0910 Calc SAP

Student SAP Find | View All First 1 of 2 Last

Term: 0810 2007 Fall Packaging Status Summary Probation  
 Program: UGNUR Practical Nursing  
 Plan: CERT-NUR CERT-Practical Nurse  
 Calc SAP Status: DISQ DISQUALIFIED  
 Override SAP Status: PROB PROBATIONARY STATUS Updated: 06/13/2008 10:35:40AM  
 User ID: sapplegren

Comments:

SAP Calculation Results

Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	N		N/A	N/A	<input type="checkbox"/>			N/A	
Max Attempted Units:	Y	84.00	76.86	84.17	<input checked="" type="checkbox"/>	WARN	50	N	N/A
Max Attempted Terms:	Y	1.000	0	85	<input checked="" type="checkbox"/>	MEET	20	N	N/A
Min Current GPA:	Y	0.000	0.000	1.999	<input checked="" type="checkbox"/>	DISQ	90	N	N/A
Min Cumulative GPA:	Y	2.500			<input type="checkbox"/>	MEET	20	N	N/A
Current Earned Units:	N				<input type="checkbox"/>			N	N/A
Cumulative Earned Units:	N				<input type="checkbox"/>			N	N/A

SAP Calculation Data

Current Units Attempted: Cumulative Units Attempted:

Processing Information

Process User Id: sapplegren  
 Process Date/Time: 06/13/08 10:26:28AM  
 Processing Message: Statistics Calc Pass 1, Term 0810

You may also enter Exceptions by career or term.

Exceptions entered in the Career Exceptions tab will remain in effect until the student changes Careers.

Term Exceptions are tied to a specific term.

The screenshot shows a web application interface with three tabs: "Student SAP", "Career Exceptions" (highlighted in yellow), and "Term Exceptions". The main content area displays the following information:

- ID:** FASAP0001 Smith, MaryLou
- Institution:** PSUNV PeopleSoft University
- Career:** UGRD Undergraduate
- Term:** [Empty field]

The "Career Exceptions" section includes a search bar with "Find | View All" and pagination "First 1 of 1 Last". The form fields are:

- Effective Date:** 06/07/2011  \***Status:** Active
- Attempted Max Units:**
- Attempted Max Terms:**
- Min Cumulative GPA:**
- Cum Earned Units %:**
- Cum Earned Units:**
- Cum Att Units to Exclude:**  (highlighted with a red border)
- Two Year GPA:**  **Terms From:**  **Terms To:**
- Comments:**

An "Audit Information" section is located at the bottom, containing:

- Last Update UserId:**
- Last Update Date/Time:**

Term Exceptions are tied to a specific term.

Student SAP Career Exceptions **Term Exceptions**

ID: FASAP0001 Smith, MaryLou Institution: PSUNV PeopleSoft University  
Career: UGRD Undergraduate Term:

**Term Exceptions** Find | View All First 1 of 1 Last

\*Term:

Override Academic Standing

Min Cumulative GPA:

Min Current GPA:

Cur Earned Units %:

Cur Earned Units:

**Cur Att Units to Exclude:**

Two Year GPA:  Terms From:  Terms To:

Comments:

**Audit Information**

Last Update UserId:  
Last Update Date/Time: