

North Dakota University System Campus Solutions -- Financial Aid Pell Only Repackaging

In PeopleSoft Campus Solution V9, Pell Only Packaging is replaced by Pell Only Repackaging. As defined below, the repackaging works similarly to the way the Pell Only packaging plan worked in V8. This plan identifies students who are Pell eligible according to their ISIR and repackages the Pell only.

Recommend that prior to running the Pell Only Repackaging plan, you run disbursement authorization (**Financial Aid > Disbursement > Process Award Authorizations**) and run and save the **Authorization Failure List (NDU_0033_FA)** so you know who should be repackaged.

Note that the Repackaging process does not change awards that are "Locked". Awards are generally locked if posted manually (rather than letting the system assign the award amount). The system assumes locked awards are the way you want them to be.

Setup

Set Up SACR > Product Related > Financial Aid > Awards > Repackaging Plan																																																																				
Add a row to create a Pell Only Repackaging Plan . Use Selection Criteria FAPDUGRDSAP, which excludes students with SAP set to "Not Meets".	Repackaging Plan																																																																			
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Batch Repackaging

Financial Aid > Awards > Repackaging > Select Students to Repackage											
<p>Use the RP_Pell_Only equation, which identifies Pell Eligible students (per ISIR).</p>	<div style="border: 1px solid black; padding: 5px;"> <h3 style="margin: 0;">Select Students for Repackaging</h3> <p>Run Control ID: <code>Select_Students_Repackage_dj</code> Report Manager Process Monitor Run</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Population Selection</p> <p><input checked="" type="checkbox"/> Population Selection</p> <p>Selection Tool: <input type="text" value="Equation Engine"/> ▼</p> <p>Equation Name: <input type="text" value="RP_PELL_ONLY"/> 🔍 Edit Equation Preview Selection Results</p> </div> <div style="border: 1px solid gray; padding: 5px;"> <p>Parameters</p> <p>*Institution: <input type="text" value="MISUB"/> 🔍 Minot State Univ-Bottineau</p> <p>*Aid Year: <input type="text" value="2009"/> 🔍 Federal Aid Year 2008-2009</p> </div> </div>										
Financial Aid > Awards > Repackaging > View Selected Students											
<p>As with Packaging, you have the opportunity to see the students selected to be repackaged.</p>	<div style="border: 1px solid black; padding: 5px;"> <h3 style="margin: 0;">Batch Repackaging Students</h3> <p>Academic Institution: MISUB Minot State Univ-Bottineau</p> <p>Aid Year: 2009 Federal Aid Year 2008-2009</p> <p>Selection Definition: EQUATION: RP_PELL_ONLY</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th>ID</th> <th>Name</th> <th>Career</th> <th>Description</th> <th>Process Status</th> </tr> </thead> <tbody> <tr> <td>011</td> <td>Mi</td> <td>UGRD</td> <td>Undergraduate</td> <td><input type="text" value="Valid"/> ▼</td> </tr> </tbody> </table> </div>	ID	Name	Career	Description	Process Status	011	Mi	UGRD	Undergraduate	<input type="text" value="Valid"/> ▼
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011	Mi	UGRD	Undergraduate	<input type="text" value="Valid"/> ▼							
Financial Aid > Awards > Repackaging > Assign Repackaging Plan											
<p>Create a run control to assign the Pell Only plan to the selected students.</p>	<div style="border: 1px solid black; padding: 5px;"> <h3 style="margin: 0;">Assign Repackaging Plan</h3> <p>Run Control ID: <code>Select_Students_Repackage_dj</code> Report Manager Process Monitor Run</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Report Request Parameters</p> <p>Institution: <input type="text" value="MISUB"/> 🔍 Minot State Univ-Bottineau</p> <p>Aid Year: <input type="text" value="2009"/> 🔍 Federal Aid Year 2008-2009</p> <p>Selection Definition: <input type="text" value="EQUATION: RP_PELL_ONLY"/> 🔍</p> </div> <div style="border: 1px solid gray; padding: 5px;"> <p>Repackaging Plan Parameters</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th>Career</th> <th>Repackaging Plan</th> <th>Sort Field</th> <th>Sort Order</th> </tr> </thead> <tbody> <tr> <td>1 UGRD 🔍</td> <td>PELL_ONLY 🔍</td> <td>EMPLID 🔍</td> <td>Ascending ▼ + -</td> </tr> </tbody> </table> </div> </div>	Career	Repackaging Plan	Sort Field	Sort Order	1 UGRD 🔍	PELL_ONLY 🔍	EMPLID 🔍	Ascending ▼ + -		
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Financial Aid > Awards > Repackaging > View Assigned Plans																															
<p>Again, you have the same option as in packaging to see which students have had the plan assigned. You can also view students by Plan. Students will fail the criteria if they are SAP ineligible or not an undergraduate.</p>	<div style="border: 1px solid black; padding: 5px;"> <h3 style="margin: 0;">Batch Repackaging Plans Assigned</h3> <p>Academic Institution MISUB Minot State Univ-Bottineau Aid Year 2009 Federal Aid Year 2008-2009 Selection Definition EQUATION: RP_PELL_ONLY</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th colspan="2" style="text-align: right;">Find View All</th> <th style="text-align: left;">First</th> <th style="text-align: center;">2 of 2</th> <th style="text-align: right;">Last</th> </tr> </thead> <tbody> <tr> <td style="width: 30%;">Repackaging Plan ID</td> <td>PELL_ONLY</td> <td colspan="2">Pell Only Repackaging</td> <td>Career UGRD</td> </tr> <tr> <td>Sort Field</td> <td>EMPLID</td> <td>Sort Order</td> <td>Asc</td> <td>Plan Order 15</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th colspan="2" style="text-align: right;">Find</th> <th style="text-align: left;">First</th> <th style="text-align: center;">1-159 of 159</th> <th style="text-align: right;">Last</th> </tr> </thead> <tbody> <tr> <td style="width: 20%;">*EMPLID</td> <td style="width: 40%;">Name</td> <td colspan="2"></td> <td style="width: 20%;">EMPLID</td> </tr> <tr> <td><input type="text" value="011"/></td> <td>Mc ..</td> <td></td> <td>011;</td> <td style="text-align: right;">-</td> </tr> </tbody> </table> </div>	Find View All		First	2 of 2	Last	Repackaging Plan ID	PELL_ONLY	Pell Only Repackaging		Career UGRD	Sort Field	EMPLID	Sort Order	Asc	Plan Order 15	Find		First	1-159 of 159	Last	*EMPLID	Name			EMPLID	<input type="text" value="011"/>	Mc ..		011;	-
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<p>Create a run control to process the selected students with the assigned plan. Note you have Live and Simulation options.</p>	<div style="border: 1px solid black; padding: 5px;"> <h3 style="margin: 0;">Repackage Students in Batch</h3> <p>Run Control ID: Process_Batch_Repackaging_dj Report Manager Process Monitor Run</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p>Report Request Parameters</p> <p>*Institution <input type="text" value="MISUB"/> Minot State Univ-Bottineau <input checked="" type="radio"/> Live *Aid Year <input type="text" value="2009"/> Federal Aid Year 2008-2009 <input type="radio"/> Simulation *Selection Definition <input type="text" value="EQUATION: RP_PELL_ONLY"/></p> </div> </div>																														
<p>As with Packaging, you have the option of viewing repackaging summary, details, and errors:</p> <p style="margin-left: 20px;">Query NDU_0141_FA, Failed to Mass Package</p> <p style="margin-left: 20px;">Financial Aid > Awards > Repackaging > View Batch Repackaging Summary</p> <p style="margin-left: 20px;">Financial Aid > Awards > Repackaging > View Batch Repackaging Details</p> <p style="margin-left: 20px;">Financial Aid > Awards > Repackaging > View Batch Repackaging Errors</p> <p>Query NDU_0074_FA, Load Vs. Pell Disbursement, is also available to help you evaluate awards.</p>																															

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Financial Aid > View Packaging Status Summary

When students have been repackaged, their Award Processing Status gets set to **“Packaging Completed”** and a Repackaging Plan ID is populated on the **“Assign Awards to a Student”** and **“View Packaging Status Summary”** screens:

EFC Status: Official [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Academic Career: Undergraduate

Aid Processing Status: Packaging Completed

Aid Application Status: *Satisfactory Academic Progress: [SAP Details](#)

Review Status: Disbursement Hold:

INST Verification Status: [Loan Counseling Status](#)

Verification Flag:

Verification Status:

Scholarship Status: [Financial Aid Awarded](#) [Award Notification](#) Main Content

*Aid Packaging Method:

Packaging Plan ID: Pell and Stafford only

Repackaging Plan ID: PELL_ONLY Pell Only Repackaging

Aggregate Source:

Aggregate Used: NSLDS

Self Service

Award Access:

Inquiry Access

External Award Access

On-Line Repackaging

Financial Aid > Awards > Award Processing > Assign Awards to a Student(Award Entry)

There is a **Repackage** capability on Award Entry similar to the **Package Retrieve** capability. Validate and Post after you retrieve the **PELL_ONLY** repackaging plan.

Career: Undergrad Package Status: [Award Notification](#)

Packaging Plan ID: Aggregate Source:

Repackaging Plan ID: PELL_ONLY Award Period:

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10	<input type="checkbox"/>	UGRD	900000001100	FEDERAL PELL GRANT	3,549.00	3,549.00	01	01	Disbursement <input type="button" value="+"/>
20	<input type="checkbox"/>	UGRD	900000001110	FEDERAL SUPPLEMENTAL GRANT	400.00	400.00	01	01	Disbursement <input type="button" value="+"/>
30	<input type="checkbox"/>	UGRD	910000002300	FEDERAL PERKINS LOAN #1	1,500.00	0.00	01	01	Disbursement <input type="button" value="+"/>
40	<input type="checkbox"/>	UGRD	910000002100	FEDERAL STAFFORD LOAN #1	4,390.00	0.00	01	01	Disbursement <input type="button" value="+"/>

NOTE: Recommend you inactive the Unsub plan that was created solely to award additional unsub Stafford so it is not called when you push the “Repackage” button.

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Testing

Financial Aid > View Packaging Status Summary	
<p>The NDUS system is globally set up to package Pell at Full Time prior to FA Census; after FA Census, it calculates Pell based on the Current Load (i.e., the load locked at census). In order to test this repackaging plan prior to census, you'll either need to change census and build FA Term for students you are adjusting (and note FA Term will only rebuild if there is other activity warranting a change), or individually adjust the fields in Pell Calculation Override.</p>	<div style="border: 1px solid black; padding: 5px;"> <p>EFC Status: Official TERM ISIR Information Database Matches Need Summary PELL PELL Calculation Override</p> <hr/> <p>Counselor: <input type="text" value=""/> <input type="button" value="Q"/></p> <p>Academic Career: <input type="text" value="UGRD"/> <input type="button" value="Q"/> Undergraduate</p> <p>Aid Processing Status: <input type="text" value="Packaging Completed"/></p> <p>Aid Application Status: <input type="text" value="Active"/> *Satisfactory Academic Progress: <input type="text" value="Meets SAP"/> SAP Details</p> <p>Review Status: <input type="text" value="Incomplete"/> Disbursement Hold: <input type="text" value=""/></p> <p>INST Verification Status: <input type="text" value="Non Select"/> Loan Counseling Status</p> <p>Verification Flag: <input type="text" value="Required"/></p> <p>Verification Status: <input type="text" value="Not Select"/></p> <hr/> <p>Scholarship Status: <input type="text" value="Not Eval"/> Financial Aid Awarded Award Notification Main Content</p> <p>*Aid Packaging Method: <input type="text" value="Auto"/></p> <p>Packaging Plan ID: <input type="text" value="PELL/STAFF"/> <input type="button" value="Q"/> Pell and Stafford only</p> <p>Repackaging Plan ID: <input type="text" value="PELL_ONLY"/> <input type="button" value="Q"/> Pell Only Repackaging</p> <p>Aggregate Source: <input type="text" value="Default"/></p> <p>Aggregate Used: NSLDS</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="text-align: center; font-weight: bold;">Self Service</p> <p>Award Access: <input type="text" value="Allowed"/></p> <p><input checked="" type="checkbox"/> Inquiry Access</p> <p><input checked="" type="checkbox"/> External Award Access</p> </div> </div> <hr/> <div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; font-weight: bold; color: blue;">PELL Eligibility Calculation</p> <hr/> <p style="font-size: 1.2em; font-weight: bold; color: blue;">Student Override</p> <p style="text-align: right;">*Status: <input type="text" value="Active"/></p> <p>*Pell Calculation Start: <input type="text" value="Formula 1 - Full-time"/></p> <p>*Pell Calculation Midterm: <input type="text" value="Formula 1 - FA Load"/></p> <p>*Pell Calculation Census: <input type="text" value="Formula 1 - FA Load"/></p> <p>Academic Base Weeks: <input type="text" value="16.0"/> Non-Standard Base Weeks: <input type="text" value=""/></p> <p>Pell Number of Terms: <input type="text" value="2"/></p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div> <p style="margin-top: 10px;">Pell Calculation Start is the period before school starts. Pell Calculation Midterm is the period between the start of school and census. The would be the example for testing in the period between school start and census.</p>