

# North Dakota University System

## Campus Solutions - Financial Aid

### Single Term Packaging

#### Set Up

#### Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Type

For each item type in each of your packaging plans, ensure that the maximum term award on Tab 4 is one half your normal annual award.

Note that this will not have an adverse effect on you full year awarding, as these are **term** amounts.

SetID: DSU01  
 Item Type: 910000002100 [Federal Subsidized Stafford Lq](#)  
 Aid Year: 2009 Federal Aid Year 2008 -2009

Award Limits by Term Category Find | View All First 1 of 1 Last

Effective Date: 06/20/2006 Status: Active

*Term Category	*Minimum	*Maximum		
Regular Term	100.00	2,750.00	+	-
Summer Term	100.00	5,500.00	+	-

Although your item type number may vary, the awards you will want to check are:

- Pell, 900000001100
- SEOG, 900000001110
- Perkins, 910000002300
- Nursing Loan, 910000002400
- Work Study, 920000001000
- Subsidized Stafford, 910000002100
- Unsubsidized Stafford, 910000002200

You may also want to consider adjusting the following so they can be added to your packaging plan:

- Subsidized Stafford, 910000002110
- Unsubsidized Stafford, 910000002100

# North Dakota University System

## Campus Solutions - Financial Aid

### Single Term Packaging

#### Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Type

If you add any additional item types to a packaging plan, note that for an item type to be available to a packaging plan, the FA Item Type setup must have “Auto Package” checked on the second tab.

FA Item Type 1 | FA Item Type 2 | **FA Item Type 3** | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

SetID: MISU1  
 Item Type: 91000002220 [Federal Unsub Stafford Ln #3](#)  
 Aid Year: 2009 Federal Aid Year 2008 -2009

**Awarding Rules** Find | View All First 1 of 1 Last

Effective Date: 01/01/1901 Status: Active

Fed/Inst Affected: Federal Only

Meet Need/Cost: Special Need/Cost

Packaging Methodology: Federal Methodology

Selection Criteria:

Need Based  **Auto Package**

Self Help Award  Package Only Once  Lock Award

Equity Award  Don't Repackage  Disbursement Protection  Adjust while in transit

**Rounding Rules**

Rounding Option: Dollar

Round Direction: Nearest

Award Remainder Rule: Last-Dllrs

Fee Remainder Rule:

Truncate Fees

#### Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan

On the packaging plan, add a row on the first tab.

Packaging Plan | **FM Target** | IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | Packaging Rules 2

Academic Institution: MISU1 Minot State University Aid Year: 2009  
 Academic Career: UGRD Undergraduate Plan ID: MISUNUR

**Packaging Plan** Find First 1 of 1 Last

\*Effective Date: 06/02/2006 \*Status: Active   **+**

Processing Order: 1

\*Award Period: Academic

\*Description: Nursing

Short Description: Nursing

Selection Criteria: MISUNURSE [Equation Detail](#)

On the Packaging Rules 1 tab, find your Subsidized Stafford. In this case, it is Sequence Nbr 20. Add Selection Criteria of **NDU\_Two\_Terms**. Only Students who have a fall and a spring term active on FA Term will be selected by this row.

Sequence Nbr:  **20** % of Total Package: 100.0 [Spending Limit Preferences](#)

Gap

Item Type: 91000002100 Federal Stafford Loan #1

Related Item Group:

**Selection Criteria: NDU\_TWO\_TERM** [Equation Detail](#)

Limited by		Limiting Factor	
Minimum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	<input type="text" value="200.00"/>	<input type="radio"/> Nbr Units
Maximum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	<input type="text" value="5,500.00"/>	<input type="radio"/> Nbr Weeks
		<input checked="" type="radio"/> None	

## North Dakota University System Campus Solutions - Financial Aid Single Term Packaging

After your Subsidized Stafford row enter two more Subsidized Stafford rows. In this example, we've added a 23 and a 25, as Subsidized Stafford for the full year is Nbr 20 and Unsubsidized Stafford is Sequence Nbr 30. Set the Selection criteria for one as **NDU\_Fall** and for the other as **NDU\_Spring**.

Add the limiting equation **NDU\_LIMIT\_SS** if you want the students' annual Sub Stafford award amount pro-rated to one term.

Sequence Nbr:	23	% of Total Package	100.0	<a href="#">Spending Limit Preferences</a>	+ -
<input type="radio"/> Gap					
<input checked="" type="radio"/> Item Type	910000002110	Federal Stafford Loan #2			
<input type="radio"/> Related Item Group					
Selection Criteria:	NDU_FALL	<a href="#">Equation Detail</a>			
<b>Limited by</b>			<b>Limiting Factor</b>		
Minimum:	<input checked="" type="radio"/> Constant	<input type="radio"/> Equation	200.00		
Maximum:	<input type="radio"/> Constant	<input checked="" type="radio"/> Equation	NDU_LIMIT_SS	<a href="#">Equation Detail</a>	
			<input type="radio"/> Nbr Units <input type="radio"/> Nbr Weeks <input checked="" type="radio"/> None		

  

Sequence Nbr:	27	% of Total Package	100.0	<a href="#">Spending Limit Preferences</a>	+ -
<input type="radio"/> Gap					
<input checked="" type="radio"/> Item Type	910000002110	Federal Stafford Loan #2			
<input type="radio"/> Related Item Group					
Selection Criteria:	NDU_SPRING	<a href="#">Equation Detail</a>			
<b>Limited by</b>			<b>Limiting Factor</b>		
Minimum:	<input checked="" type="radio"/> Constant	<input type="radio"/> Equation	200.00		
Maximum:	<input type="radio"/> Constant	<input checked="" type="radio"/> Equation	NDU_LIMIT_SS	<a href="#">Equation Detail</a>	
			<input type="radio"/> Nbr Units <input type="radio"/> Nbr Weeks <input checked="" type="radio"/> None		

In this example, we used a different Sub Stafford Item Types for Fall/Spring than was used for the academic year. If you use a different item type for the fall only/spring only awards than you use for the academic year, you could then use on-line packaging to adjust awards when you determine the student will not be attending a term. Note that the FA Term would need to be Inactive for one term in order for the one-term packaging equations to be invoked. Item Types 910000002100, 910000002110, 910000002120 have been set up in the equation to work. Be sure that any item types that you assign here are set up in your **Identify Self Service Lenders** page. (Set Up SACR>Production Related>Financial Aid>Loans>Identify Self Service Lenders).

# North Dakota University System

## Campus Solutions - Financial Aid

### Single Term Packaging

On the Packaging Rules 2 tab, find the new rows you just added and change the Disbursement Plan to Override Default and enter the appropriate Disbursement Plan code.

Change the Split Code to Override Default and enter the appropriate Split code.

Note that the Award Action defaults to Offer/Accept. Ensure you change it to Offer.

Sequence Nbr: 23    Item Type: 910000002110    Federal Stafford Loan #2

Award Action: Offer

**Disbursement Plan**

Use Item Type Default    Disb Plan: 09    Fall Only

**Override Default**

**Split Code**

Use Item Type Default    Split Code: 02    Single Disbursement

**Override Default**

Custom Split Defined By: [ ]

Sequence Nbr: 27    Item Type: 910000002110    Federal Stafford Loan #2

Award Action: Offer

**Disbursement Plan**

Use Item Type Default    Disb Plan: 10    Spring Only

**Override Default**

**Split Code**

Use Item Type Default    Split Code: 02    Single Disbursement

**Override Default**

Custom Split Defined By: [ ]

On the Packaging Rules 1 tab, find your Unsubsidized Stafford. In this case, it is Sequence Nbr 30. Add Selection Criteria of **NDU\_Two\_Terms**. Only Students who have a fall and a spring term active on FA Term will be selected by this row.

Sequence Nbr: 30    % of Total Package: 100.0    [Spending Limit Preferences](#)

Gap

**Item Type**    910000002200    Federal Unsub Stafford Ln #1

Related Item Group: [ ]

**Selection Criteria**: NDU\_TWO\_TERM    [Equation Detail](#)

Limited by		Limiting Factor	
Minimum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	[ 200.00 ]	<input type="radio"/> Nbr Units
Maximum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	[ 12,500.00 ]	<input type="radio"/> Nbr Weeks
			<input checked="" type="radio"/> <b>None</b>

## North Dakota University System Campus Solutions - Financial Aid Single Term Packaging

On tab Packaging Rules 1 add two rows for Unsub after the existing Unsub row, and put appropriate selection criteria and amount equations.

In this example, sequence numbers 40 and 50 were added.

Set the Selection criteria for one as **NDU\_Fall** and for the other as **NDU\_Spring**.

Add the limiting equation **NDU\_LIMIT\_US** if you want the students' annual Unsub Stafford award amount pro-rated to one term.

The screenshot displays two configuration panels for packaging rules. The top panel is for Sequence Nbr: 40. It has 'Item Type' set to 910000002210 (Federal Unsub Stafford Ln #2) and 'Selection Criteria' set to NDU\_FALL. The 'Limited by' section shows 'Minimum' as Constant 200.00 and 'Maximum' as Equation NDU\_LIMIT\_US. The 'Limiting Factor' is set to None. The bottom panel is for Sequence Nbr: 50. It has the same 'Item Type' and 'Selection Criteria' set to NDU\_SPRING. The 'Limited by' section shows 'Minimum' as Constant 200.00 and 'Maximum' as Equation NDU\_LIMIT\_US. The 'Limiting Factor' is set to None. Green circles highlight the sequence numbers, selection criteria, and maximum equations in both panels.

In this example, we used a different Unsub Stafford Item Types for Fall/Spring than was used for the academic year. If you use a different item type for the fall only/spring only awards than you use for the academic year, you could then use on-line packaging to adjust awards when you determine the student will not be attending a term. Note that the FA Term would need to be Inactive for one term in order for the one-term packaging equations to be invoked. Be sure that any item types that you assign here are set up in your **Identify Self Service Lenders** page. (Set Up SACR>Production Related>Financial Aid>Loans>Identify Self Service Lenders)

# North Dakota University System Campus Solutions - Financial Aid Single Term Packaging

On the Packaging Rules 2 tab, find the new rows you just added and change the Disbursement Plan to Override Default and enter the appropriate Disbursement Plan code.

Change the Split Code to Override Default and enter the appropriate Split code.

Note that the **Award Action defaults to Offer/Accept**. Ensure you change it to Offer.

The screenshot displays two rows of configuration for packaging rules. Each row includes fields for Sequence Nbr, Item Type, and Federal Unsub Stafford Ln #2. The Award Action is set to 'Offer' in both. The Disbursement Plan and Split Code sections offer options to 'Use Item Type Default', 'Override Default', or 'Custom Split Defined By'. In the first row (Sequence Nbr 40), 'Override Default' is selected for both Disbursement Plan (code 09, 'Fall Only') and Split Code (code 02, 'Single Disbursement'). In the second row (Sequence Nbr 50), 'Override Default' is selected for both Disbursement Plan (code 10, 'Spring Only') and Split Code (code 02, 'Single Disbursement').

Sequence Nbr	Item Type	Federal Unsub Stafford Ln #2	Award Action	Disbursement Plan	Split Code
40		910000002210	Offer	09 (Fall Only)	02 (Single Disbursement)
50		910000002210	Offer	10 (Spring Only)	02 (Single Disbursement)

Repeat the process for each Packaging Plan that you normally assign either on-line or in batch.

# North Dakota University System

## Campus Solutions - Financial Aid

### Single Term Packaging

#### Processing

#### NDU Applications > NDU Financial Aid > NDU Ready Package

Run NDU Ready Package as you would normally run it. To prorate EFCs as part of your packaging so students have the correct need, run the following processes after running Ready Package:

#### NDU Applications > NDU Financial Aid > Processes > NDU Ready One Term Calc

When you ran the Ready Package process it identified students with only one active term on FA Term for the aid year and set them to "Ready for Counselor Review". The NDU Ready One Term process updates the FM Duration for those students and makes them ready for the INAS Batch Calc process to be run to prorate their EFC.

**Ndu Fa One Rctl**

---

### Ready One Term

Run Control ID: NDU\_Ready\_One\_Term\_Calc\_dj      [Report Manager](#)    [Process Monitor](#)    Run

\*Institution:     \*Term:     Budget Duration:

Main Content

The normal budget durations would be:

- 4 for fall
- 5 for spring
- 3 for summer.

#### Financial Aid > File Management > INAS Batch Calculation

Run INAS Batch Calc to actually recalculate the selected EFCs to the prorated value.

### Batch INAS Calculation

Run Control ID: INAS\_Batch\_Calc\_dj      [Report Manager](#)    [Process Monitor](#)    Run

Process Name:                      FAPINCLC

**Parameters**      [Find](#) | [View All](#)      First  1 of 2  Last

*Institution:	<input type="text" value="DSU01"/>	Dickinson State University
Aid Year:	<input type="text" value="2009"/>	Federal Aid Year 2008-2009
Application Type:	<input type="text" value="F"/>	Federal
Clear Calc Requests?:	<input type="text" value="Y"/>	Yes

**North Dakota University System  
Campus Solutions - Financial Aid  
Single Term Packaging**

**Reporting Tools > Query Viewer**

Use query **NDU\_0045\_FA, One Term Package Status**, to review which students are being/have been processed for one term.

Complete your normal mass packaging processes from here:

**Financial Aid > Awards > Need Summary Validation**

**Financial Aid > Awards > Mass Packaging > Select Students**

**Financial Aid > Awards > Mass Packaging > Assign Plans** – Only assign plans that have been modified for one term processing.

**Financial Aid > Awards > Mass Packaging > Process Mass Packaging**

Do clean-up, as appropriate, which might include:

**NDU Applications > NDU Financial Aid > Reports > NDU Pell Grant with BA**

**Reporting Tools > Query > NDU\_0141\_FA, Failed to Mass Package**

**Financial Aid > Awards > Generate Overaward Report.**

**NDU Applications > NDU Financial Aid > Reports > NDU 2 Yr Prog Loan Eligibility**