

North Dakota University System Campus Solutions Financial Aid Zeroing Out Awards and Budgets

1. Query **NDU_FA_0080, Awarded Not Attending**, will help you find student's whose awards need to be cancelled.
2. To easily zero out awards, here is a practice from Salisbury University:

Set Up

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

Add a plan ID called **CANCEL**. You can leave the *Selection Criteria* blank; you'll not want to use this plan in batch, as some awards will need manual handling.

On the **Packaging Rules 1** tab, assign any item type, but set *Selection Criteria* to **NDU_PK_FALSE** (this criteria is always false!).

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

Academic Institution: MISUB Minot State Univ-Bottineau
Aid Year: 2010

Academic Career: UGRD Undergraduate
Plan ID: CANCEL

Find First 1 of 1 Last

*Effective Date: By *Status: Active Copy

Processing Order:

*Award Period: Both

*Description:

Short Description:

Selection Criteria:

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

Academic Institution: MISUB Minot State Univ-Bottineau
Aid Year: 2010

Academic Career: UGRD Undergraduate
Plan ID: CANCEL

Find First 1 of 1 Last

Effective Date: 06/10/2009 Status: Active Processing Order: 1

Find View All First 1 of 1 Last

Sequence Nbr: % of Total Package Spending Limit Preferences

Gap

Item Type FEDERAL WORK STUDY

Related Item Group

Selection Criteria: Equation Detail

Limited by		Limiting Factor	
Minimum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	<input type="text" value="1.00"/>	<input type="radio"/> Nbr Units
Maximum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	<input type="text" value="1.00"/>	<input type="radio"/> Nbr Weeks
		<input checked="" type="radio"/> None	

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Procedure

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

Select and retrieve the **CANCEL** packaging plan then *Validate* and *Post*; non-locked and non-PJ awards will be canceled.

As necessary, manually cancel any locked awards by putting a "C" in Action, tabbing out, then Validating and Posting.

Student Aid Package Need Summary Term Summary

Fors ID: 080C
Aid Year: 2010 Federal Aid Year 2009 -2010 Institution: MISUB

Career: UGRD Undergrad Package Status: Completed Award Notification
Packaging Plan ID: **CANCEL** Retrieve Aggregate Source: Default Validate
Repackaging Plan ID: Repackage Award Period: Both Post Reset

Award		Status							
*Nbr	Action	Career	Item Type	Description	Offered	Accepted	*Disb Plan	*Split Code	
10	<input type="checkbox"/>	UGRD	900000001100	FEDERAL PELL GRANT	0.00	0.00	01	01	Disbursement +
20	<input type="checkbox"/>	UGRD	900000001110	FEDERAL SUPPLEMENTAL GRANT	0.00	0.00	01	01	Disbursement +
50	<input type="checkbox"/>	UGRD	910000002100	FEDERAL STAFFORD LOAN #1	0.00	0.00	01	01	Disbursement +
60	<input type="checkbox"/>	UGRD	910000002200	FEDERAL UNSUBSIDIZED LOAN #1	0.00	0.00	01	01	Disbursement +
70	<input checked="" type="checkbox"/>	UGRD	920000001000	FEDERAL WORK STUDY	0.00	0.00			Disbursement Message +

Financial Aid > Awards > Award Processing > Invoke Professional Judgment

As necessary, manually cancel any PJ awards by putting a "C" in Action, tabbing out, then Validating and Posting.

Professional Judgement Need Summary Term Summary

Aid Year: 2009 Federal Aid Year 2008 -2009 ID: 435 Institution: UND01

Career: UGRD Undergrad Package Status: Completed Award Notification
Packaging Plan ID: RESTRICTED Retrieve Aggregate Source: Default Validate
Repackaging Plan ID: Repackage Award Period: Both Post Reset

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10	<input checked="" type="checkbox"/>	UGRD	900000001010	Federal Pell Grant EY	5,350.00	5,350.00	01	01	Disbursement +
20	<input type="checkbox"/>	UGRD	910000002100	Federal Stafford Loan	0.00	0.00	01	01	Disbursement +
30	<input type="checkbox"/>	UGRD	910000002200	Federal Unsubsidized Stafford	0.00	0.00	01	01	Disbursement +

- Another of the issues we face is easily zeroing out budgets. Here's a trick courtesy of City Colleges of Chicago:

Set Up

Setup SACR > Product Related > Financial Aid > Budgets > Budget Groups

To set this feature up, add a new **Budget Group** of **ZERO** for each term and career.

Budget Groups

Find an Existing Value Add a New Value

Academic Institution: MISU1

Budget Group Code: ZERO

Aid Year: 2009

Academic Career: ugrd

Term: 0910

Add

10 June 2009

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Zeroing Out Awards and Budgets

Add appropriate descriptions and save. Leave *Categories* and *Item Codes* blank.

The “Copy Setup Data” feature doesn’t appear to work with blank Categories, so we’ll need to see if these roll-over to the next aid year; it may be necessary to recreate these each year.

Create Budget Group

Budget Group Code: ZERO Academic Institution: MISU1

Aid Year: 2009 Federal Aid Year 2008-2009

Career: UGRD Undergraduate

Term: 0910 2008 Fall

*Description: Zero Out Budget

Short Description: Zero Bdgt

Cost of Attendance (Term)

Inst COA: 0.00

Fed COA: 0.00

Pell COA: 0.00

Pell LTHT: 0.00

[Copy Setup Data](#)

*Category	*Item Code	*Amount	Pell Amount	LHT Pell Amount	Translate Long Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	

[Save](#)
[Add](#)
[Update/Display](#)

Procedure

To zero out a budget, go to the Budget Maintenance screen and add a row

Select the **ZERO Budget Group**. Save. Repeat for second semester as necessary. Save.

The budget items are now zeroed out.

You might consider clicking the *Update Need Summary* button while you’re here!

Financial Aid > Budes > Maintain Term Budgets

*Career: UGRD Undergraduate [FA Term](#) [Need Summary](#) [Student Detail](#)

*Term: 0930 2009 Sprin Awd Period: Academic Instr Week: 16.0

Eff Date: 08/11/2008 Sequence: 1 User ID: FAPBUDMV

Budget Group: USYSA Undergraduate System Assigned

Inst COA: 5,603.00
Fed COA: 5,603.00
Pell COA: 5,603.00
Pell LTHT: 5,603.00

*Category	*Item Code	User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
BOOK	BKSFT	FAPBUDMV	450.00	Federal	450.00	450.00
HSNG	RMBDWP	FAPBUDMV	1,701.00	Federal	1,701.00	1,701.00
MISC	MIWPFT	FAPBUDMV	930.00	Federal	930.00	930.00
TUIT	TFISFT	FAPBUDMV	2,522.00	Federal	2,522.00	2,522.00

*Career: UGRD Undergraduate [FA Term](#) [Need Summary](#) [Student Detail](#)

*Term: 0930 2009 Sprin Awd Period: Academic Instr Week: 16.0

Eff Date: 03/30/2009 Sequence: 1 User ID: djunk

Budget Group: ZERO Zero Out Budget

Inst COA: 0.00
Fed COA: 0.00
Pell COA: 0.00
Pell LTHT: 0.00

*Category	*Item Code	User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
<input type="text"/>	<input type="text"/>		0.00		0.00	0.00

Zeroing Out Awards and Budgets

- After you zero out the awards and budget, set FA Term row to **Inactive**:

Financial Aid > Financial Aid Term > Maintain Student FA Term

Add a row using the “+” button, and change the Status to **Inactive**. Save.

Repeat for other term(s) in the aid year.

This step is necessary to keep the student from being SAP evaluated.

The screenshot shows the 'Maintain Student FA Term' interface. The 'Status' dropdown menu is set to 'Inactive' and is highlighted with a red box. The 'Save' button at the bottom left is also highlighted with a red box. The form includes fields for Institution (Minot State Univ-Bottineau), Term (1030 2010 Sprin Semester), and Student Data (Effective Date: 06/10/2009, Seq: 1, Career: Undergraduate, Prim Prog: UGAAM, Acad Plan: AAS-AAM, Sub-Plan, Aid Year: Federal Aid Year 2009-2010, Billing Career: Undergraduate). The 'Status' dropdown menu is set to 'Inactive' and is highlighted with a red box. The 'Save' button at the bottom left is also highlighted with a red box.