SOLUTION DESIGN
FA PACKAGING CUSTOMIZATION

Exclude Running Start (RS) and Incarcerated Students from Packaging Selection

Abstract

Per the Financial Aid Maintenance List on Mass Packaging change requests, a solution is needed to exclude Running Start and Incarcerated Students from packaging selection.

SBCTC

ExcludE RS & Incarcerated students from Packaging Selection

Issue Overview

Clarified Problem Statement: Running Start and Incarcerated STudents are Selected for Packaging

Running Start students are not eligible for traditional financial aid. Incarcerated students have limited eligibility for traditional financial aid[1]. The packaging selection process does not have criteria to prevent a student in either population from being packaged traditional financial aid. As a result, staff must manually award students or cancel/adjust award offers after they are packaged, depending on eligibility.

Figure 1: Student A is active in the Running Start Student Group - Records and Enrollment > Career and Program Information > Student Groups

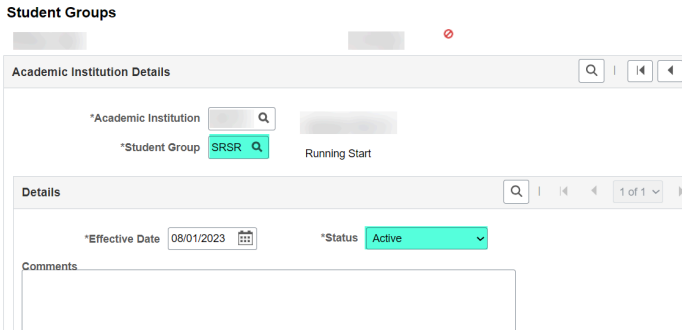


Figure 2: The FA-WI-SP packaging plan selects Student A and packages traditional financial aid – Financial Aid > Awards > Award Processing > Assign Awards to a Student

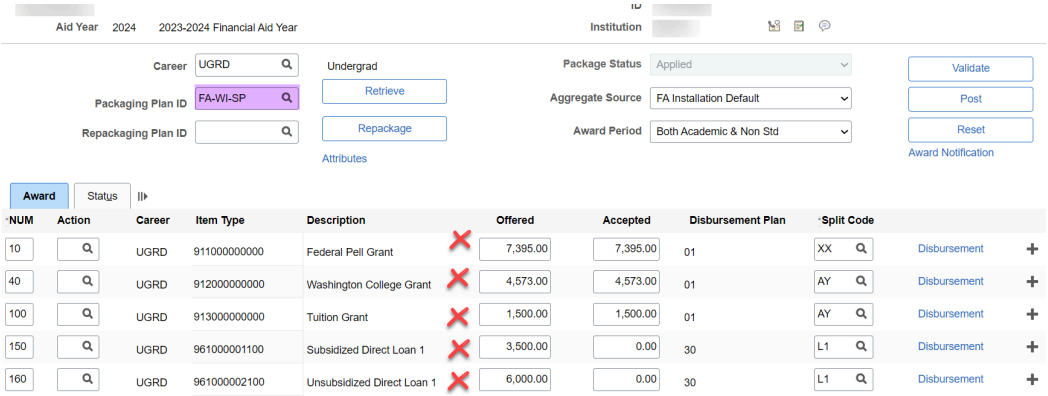


Figure 3: Student B is active in an Incarcerated Student Group - Records and Enrollment > Career and Program Information > Student Groups

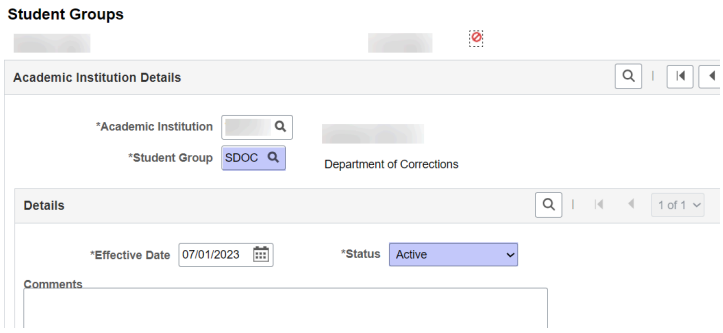
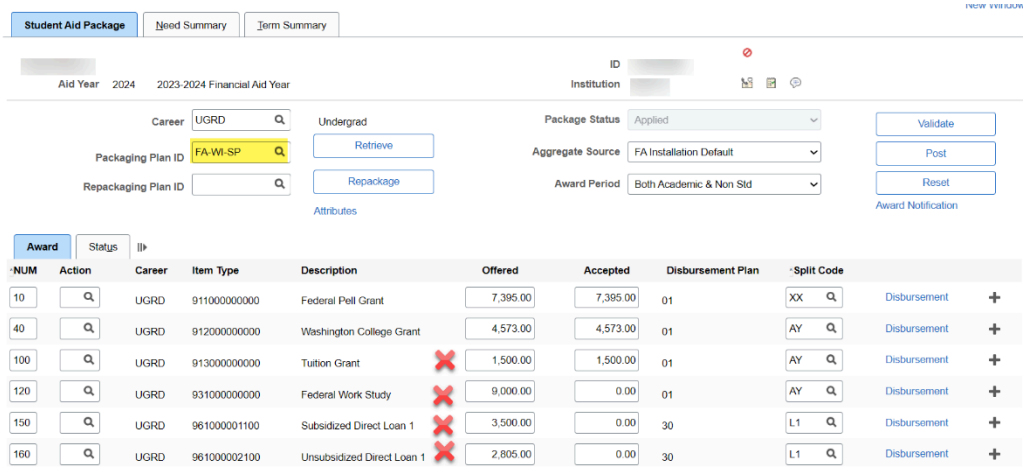


Figure 4: The FA-WI-SP packaging plan selects Student B and packages full traditional financial aid – Financial Aid > Awards > Award Processing > Assign Awards to a Student

[1] Pell, Federal Supplemental Educational Opportunity Grant, Federal Work Study, Direct Loans, Washington College Grant, College Bound Scholarship, State Work Study, Need Based Tuition Waiver and College Grant

ExcludE RS & Incarcerated students from Packaging Selection



Background Information

Regulatory Language for Incarcerated Students and Title IV Eligibility

Beginning on July 1, 2023 a confined or incarcerated individual is eligible to receive a Pell Grant if that individual enrolls in an eligible [Prison Education Programs].

Students who are confined or incarcerated remain ineligible for Direct Loan funds during the period of their incarceration. Although there are no statutory or regulatory limitations on eligibility for TEACH Grants, Federal Supplemental Education Opportunity Grants (FSEOG), or Federal Work Study (FWS) for confined or incarcerated individuals, they may not qualify for these types of assistance due to other program eligibility requirements. However, schools that enroll confined or incarcerated individuals must consider whether they would qualify for assistance under these programs when awarding aid.

Reference:
https://fsapartners.ed.gov/sites/default/files/2023-2024/2023-2024_Federal_Student_Aid_Handbook/_knowledge-center_fsa-handbook_2023-2024_vol1.pdf

Regulatory Language for Incarcerated Students and Washington College Grant Eligibility

Incarcerated Student Eligibility
Incarcerated students enrolled in an eligible program of study at an eligible institution as defined for financial aid purposes AND who meet all eligibility criteria for the WCG, are eligible for WCG.

Reference: https://wsac.wa.gov/sites/default/files/2023-24_WCG-CBS_ProgramManual.pdf

Regulatory Language for Running Start Program and Title IV Eligibility

A student enrolled in elementary or secondary school is not eligible for aid from the FSA programs, even if they are simultaneously enrolled in an eligible college program. A student is considered to be enrolled in secondary school if they are pursuing a high school diploma or if they have completed the requirements for a diploma, but have not yet received it, and are either taking college coursework for which the student's high school gives credit or the high school still considers the student to be enrolled there.

ExcludE RS & Incarcerated students from Packaging Selection

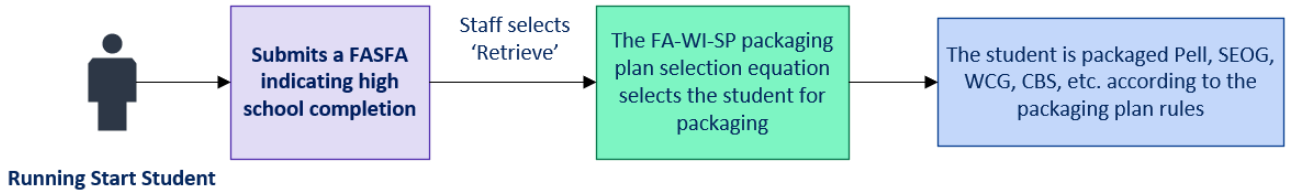
Reference:
https://fsapartners.ed.gov/sites/default/files/2023-2024/2023-2024_Federal_Student_Aid_Handbook/_knowledge-center_fsa-handbook_2023-2024_vol1.pdf

Regulatory Language for Running Start Program and Washington College Grant Eligibility

To qualify, the individual needs to have a high school diploma or equivalent and have lived in Washington for a period of one year prior to enrollment in higher education primarily for reasons other than educational.

Reference: https://wsac.wa.gov/sites/default/files/2023-24_WCG-CBS_ProgramManual.pdf

Visual Flow Diagram of How a Student is Selected for Packaging

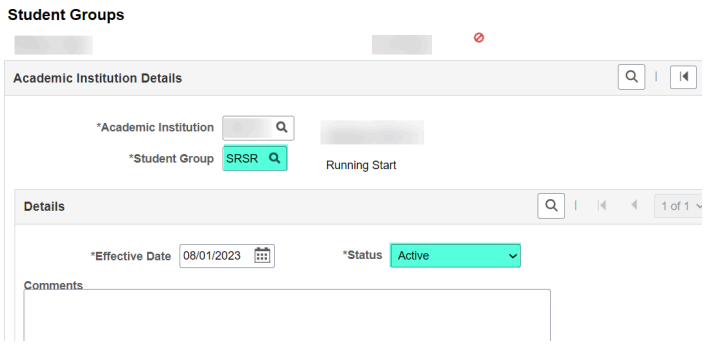


The student in the example is someone who meets all FA eligibility requirements except high school completion. The student has active FA Terms for Fall, Winter and Spring.

Sample Data Visuals of Problem Student

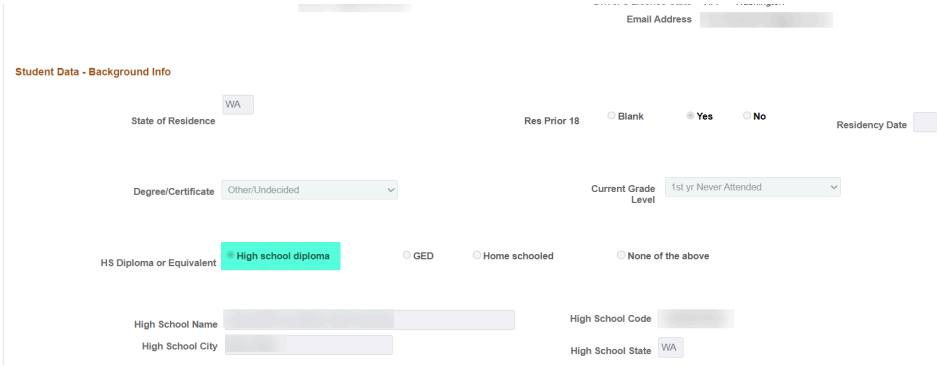
The visual below shows a student who is in the Running Start Program at the college and is active in the Running Start Student Group (SRSR). The student will not be graduating from high school until Spring of next year but submits a FAFSA indicating high school completion during Fall of this year.

Figure 5: Student is active in the Running Start Student Group - Records and Enrollment > Career and Program Information > Student Groups



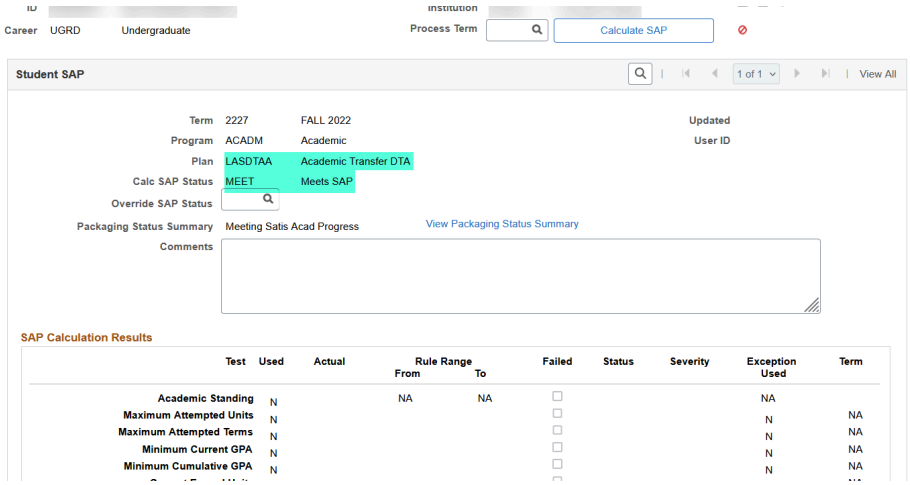
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Figure 6: Student indicates high school completion on FASFA – Financial Aid > Federal Application Data > Correct 2023-2024 ISIR Records



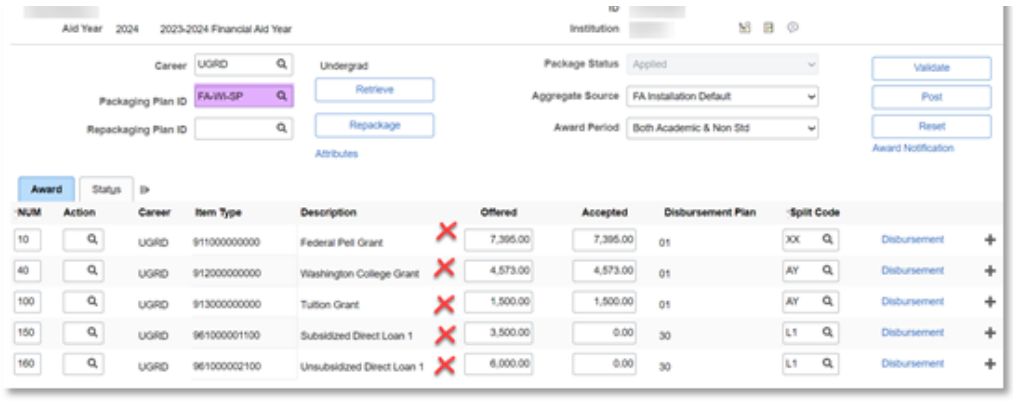
The student appears to be meeting all FA eligibility requirements (i.e. meeting Satisfactory Academic Progress, pursuing a financial aid eligible academic plan, high school completion, etc.).

Figure 7: Student is pursuing an Associate's degree and meeting SAP - Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data



The staff selects 'Retrieve' and the system packages the student Pell, WCG, Tuition Grant (aka College Grant) and loans the student is not eligible for.

Figure 8: The FA-WI-SP packaging plan selects the student and packages traditional financial aid – Financial Aid > Awards > Award Processing > Assign Awards to a Student



ExcludE RS & Incarcerated students from Packaging Selection

Proposed Solution

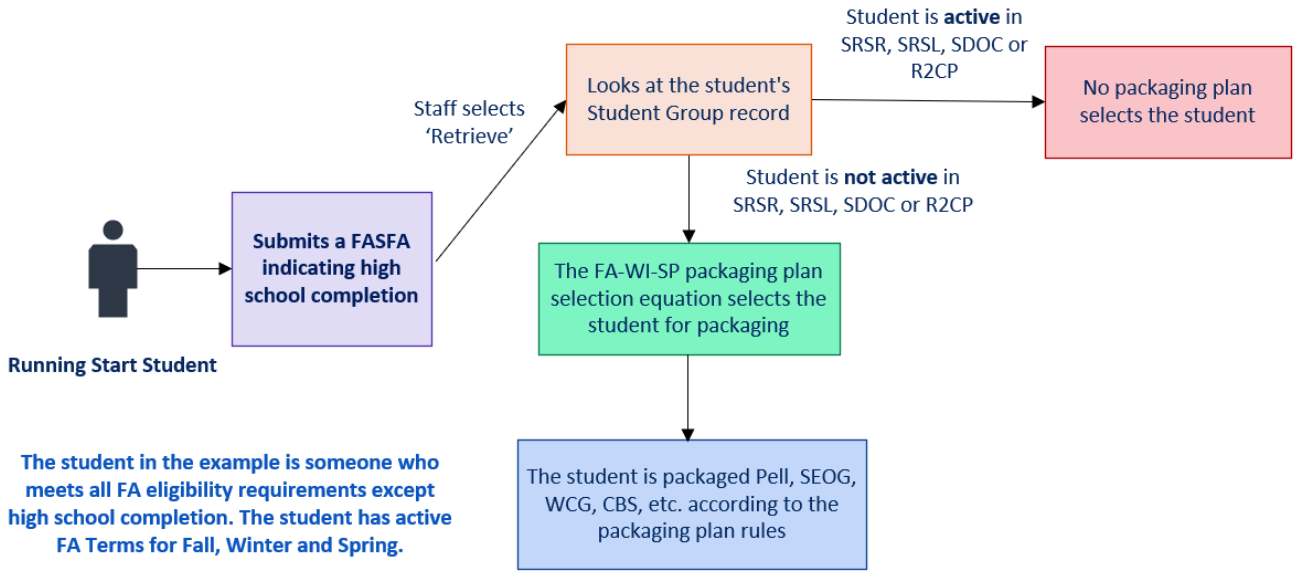
Update the packaging plan selection equation engines to search the student's Student Group record and determine if the student is active in one of the four Student Groups (SRSR - Running Start, SRSL - Running Start Waiver, SDOC - Department of Corrections, or R2CP - Second Chance Pell) and exclude the student from selection accordingly.

Solution Overview

1. Create a SQL and associated equation engine that reviews the student's Student Group record and indicates whether the student is active in one of the following Student Groups at the institution:
    a. SRSR - Running Start
    b. SRSL - Running Start Waiver
    c. SDOC - Department of Corrections
    d. R2CP - Second Chance Pell

2. Update the 14 packaging plan selection equation engines with criteria of excluding the student if the student is currently active in one of the four Student Groups.

Visual Flow Diagram of Processing Logic Change



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Technical Details of Solution

Create Exclude STudent Group SQL and equation engine:

The following new SQL and exclude Student Group equation engine will be created to pull data from the student's Student Group record looking specifically for statuses tied to Student Groups: SRSR - Running Start, SRSL - Running Start Waiver, SDOC - Department of Corrections, and R2CP - Second Chance Pell.

Figure 8: Example RS and DOC Student Group SQL

Equation Callable SQL

Equation Operand Sql CTC_FA_RS_DOC_CHECK

SQL Information — Find | View All — First 1 of 3 Last

Effective Date	Status	Description
10/17/2023	Active	Check for RS and DOC Student Group data

Equation Callable Sql Text

```
SELECT A.EFF_STATUS
  FROM PS_STDNT_GRPS_HIST A
  WHERE ( EXISTS (SELECT 'X'
  FROM PS_STDNT_GRPS_HIST B
  WHERE B.EFFDT =
      (SELECT MAX(B_ED.EFFDT) FROM PS_STDNT_GRPS_HIST B_ED
      WHERE B.EMPLID = B_ED.EMPLID
        AND B.INSTITUTION = B_ED.INSTITUTION
        AND B.STDNT_GROUP = B_ED.STDNT_GROUP
        AND B_ED.EFFDT <= SYSDATE)
    AND B.EMPLID = A.EMPLID
    AND B.INSTITUTION = A.INSTITUTION
    AND B.STDNT_GROUP = A.STDNT_GROUP
    AND B.STDNT_GROUP IN ('SDOC','SRSR','R2CP','SRSL')
    AND B.EFF_STATUS = 'A')
    AND A.EMPLID = :2
    AND A.INSTITUTION = :1
    AND A.EFFDT =
      (SELECT MAX(A_ED.EFFDT) FROM PS_STDNT_GRPS_HIST A_ED
      WHERE A.EMPLID = A_ED.EMPLID
        AND A.INSTITUTION = A_ED.INSTITUTION
        AND A.STDNT_GROUP = A_ED.STDNT_GROUP
        AND A_ED.EFFDT <= SYSDATE))
```

Figure 9: Exclude Student Group Equation Engine

Equation Editor

Equation Name CTCFAEXCLUDE

Equation Table — Find | View All — First 1 of 1 Last

*Eff Date 08/21/2023 Active Enable Preview Results

Short Desc ExcldStdGp *Descr Exclude Student Group

Compile Status Successfully Parsed

Equation Edit Function

Equation Detail — Find | View All — First 1-18 of 34 Last

Sel	Line	Keyword	Operand Type	Operand	Comment
	1	Assign	Local Variable	SQL_RC	
	2		Number	0.0000000000	
	3	End Assign			
	4	Assign	Local Variable	SQL_COUNT	
	5		Number	0.0000000000	
	6	End Assign			
	7	Assign	Local Variable	LOCAL_INSTITUTION	
	8		Global Variable	INSTITUTION	
	9	End Assign			
	10	Assign	Local Variable	LOCAL_EMPLID	
	11		Global Variable	EMPLID	
	12	End Assign			
	13	Assign	Local Variable	ACTIVE_IN_ST_GRP.	
	14		String		
	15	End Assign			
	16	Call	SQL	CTC_FA_RS_DOC_CHECK	
	17	Call Parms			
	18		Local Variable	SQL_RC	

Application Prompts — Personalize | Find | View All | — First 1 of 1 Last

	*Application Prompt ID
1	No Application Selected

The equation engine will be called by the packaging plan selection equation engines and populate a value for EXCLUDE_STUDENT of 'A' or null

A = currently active in one of the four Student Groups

Null = not active in any of the four Student Groups

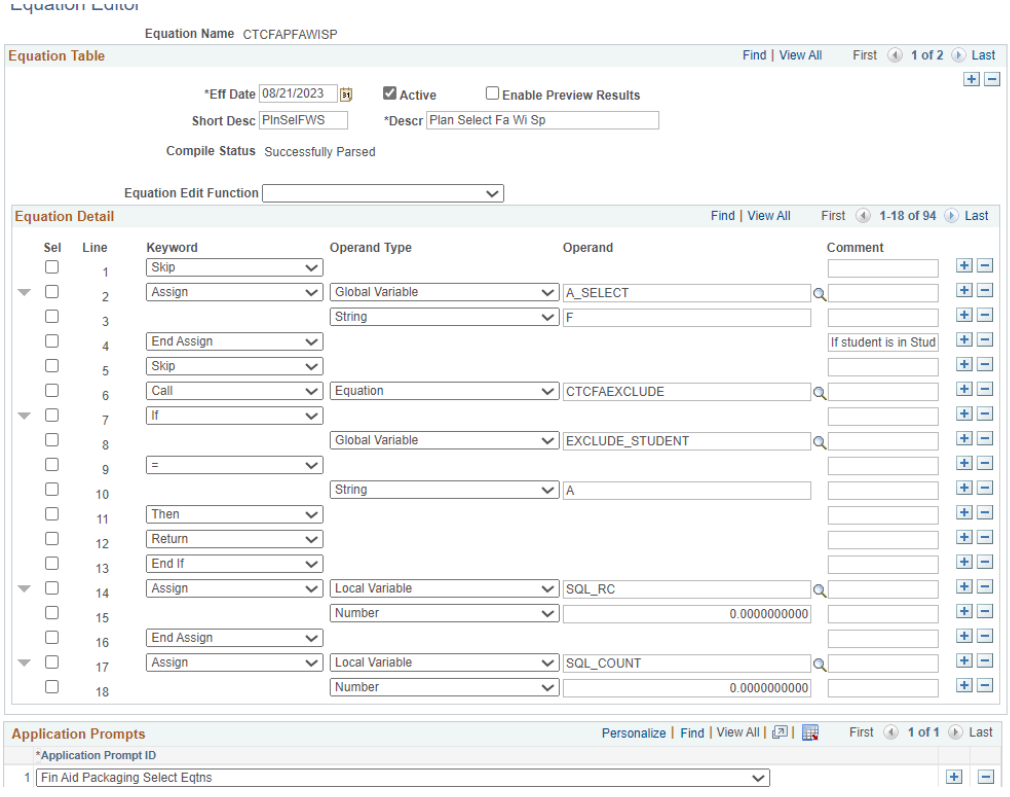
UPDATE PACKAGING PLAN SELECTION EQUATION ENGINES:

All 14 packaging plan selection equation engines will be updated with criteria to exclude the student if the Exclude Student Group Equation Engine returns a value indicating the student is currently active in one of the four Student Groups (SRSR - Running Start, SRSL - Running Start Waiver, SDOC - Department of Corrections, or R2CP - Second Chance Pell)

Packaging Plan Selection Equation Engines

CTCFAPFA	Plan Select Fall
CTCFAPFAWI	Plan Select Fa Wi
CTCFAPFAWISP	Plan Select Fa Wi Sp
CTCFAPFWSR	Plan Select FA Wi Sp Su
CTCFAPSP	Plan Select Spring
CTCFAPSPSU	Plan Select Sp Su
CTCFAPSU	Plan Select Summer
CTCFAPSUFA	Plan Select Su Fa
CTCFAPSUFAWI	Plan Select Su Fa Wi
CTCFAPSUT	Summer Trlr Select
CTCFAPUFWS	Plan Select Su Fa Wi Sp
CTCFAPWI	Plan Select Winter
CTCFAPWISP	Plan Select Wi Sp
CTCFAPWISPSU	Plan Select Wi Sp Su

Figure 10: Example Packaging Plan Selection Equation Engine



The student will leave the equation engine if the EXCLUDE_STUDENT value is 'Y'.

TEST SCOPE

ExcludE RS & Incarcerated students from Packaging Selection

Out of Scope for Testing the Solution

This solution will not work when a user manually selects the packaging plan for a student on the *Assign Awards to a Student* page since that eliminates the role of the packaging plan selection equation engine. In other words, if a user were to go to the *Assign Awards to a Student* screen, manually select a packaging plan for the *Packaging Plan ID* field then selects 'Retrieve', there is no step in that process where the packaging plan selection equation engines is called to look at the Student Groups the student is active in. The student will be packaged according to the packaging plan rules the user manually selected.

To better understand what is in scope for the solution, the following are the two ways the packaging selection equation engine is called when packaging:

1) Selecting 'Retrieve' with the *Packaging Plan ID* field left blank (https://ctclinkreferencecenter.ctclink.us/m/92427/l/934311-9-2-auto-packaging-financial-aid)
2) Running the *Mass Packaging Assign* process for mass packaging (https://ctclinkreferencecenter.ctclink.us/m/92427/l/1010094-9-2-mass-packaging)

Recommended Test Scenarios

Leave the *Packaging Plan ID* field blank or clear it out then select 'Retrieve' on the following scenario of students to confirm the behavior of the updated packaging plan selection equation engines.

Scenario 1: Student has at least one active FA term for the aid year and is in Running Start Group (SRSR or SRSL)
Expected outcome: Student should not be selected for any packaging plan.

Scenario 2: Student has at least one active FA term for the aid year and is no longer active in Running Start Group (SRSR or SRSL)
Expected outcome: Student should be selected for a packaging plan.

Scenario 3: Student has at least one active FA term for the aid year and is in an Incarcerated Student Group (SDOC or R2CP)
Expected outcome: Student should not be selected for any packaging plan.

Scenario 4: Student has at least one active FA term for the aid year and is no longer active in an Incarcerated Student Group (SDOC or R2CP)
Expected outcome: Student should be selected for a packaging plan.

Scenario 5: Student has at least one active FA term for the aid year, is no longer active in a Running Start Group (SRSR or SRSL) but is now active in an Incarcerated Student Group (SDOC or R2CP)
Expected outcome: Student should not be selected for a packaging plan.