



# 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<sup>1</sup>. 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

**Student Groups**

Academic Institution Details

\*Academic Institution

\*Student Group **SRSR**  Running Start

Details

\*Effective Date 08/01/2023

\*Status **Active**

Comments

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

Aid Year 2024 2023-2024 Financial Aid Year

Institution

Career **UGRD**  Undergrad

Package Status **Applied**

Package Plan ID **FA-WI-SP**  Retrieve

Aggregate Source **FA Installation Default**

Repackaging Plan ID  Repackage

Award Period **Both Academic & Non Std**

Validate

Post

Reset

Award Notification

Attributes

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code		
10	<input type="text"/>	UGRD	911000000000	Federal Pell Grant	<input type="text"/>	7,395.00	7,395.00	01	XX <input type="text"/>	Disbursement +
40	<input type="text"/>	UGRD	912000000000	Washington College Grant	<input type="text"/>	4,573.00	4,573.00	01	AY <input type="text"/>	Disbursement +
100	<input type="text"/>	UGRD	913000000000	Tuition Grant	<input type="text"/>	1,500.00	1,500.00	01	AY <input type="text"/>	Disbursement +
150	<input type="text"/>	UGRD	961000001100	Subsidized Direct Loan 1	<input type="text"/>	3,500.00	0.00	30	L1 <input type="text"/>	Disbursement +
160	<input type="text"/>	UGRD	961000002100	Unsubsidized Direct Loan 1	<input type="text"/>	6,000.00	0.00	30	L1 <input type="text"/>	Disbursement +

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

**Student Groups**

Academic Institution Details

\*Academic Institution

\*Student Group **SDOC**  Department of Corrections

Details

\*Effective Date 07/01/2023

\*Status **Active**

Comments

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

<sup>1</sup> 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

Student Aid Package

Need Summary

Term Summary

NEW VERSION

Aid Year

2024

2023-2024 Financial Aid Year

ID

Institution

Career

UGRD

Undergrad

Package Status

Applied

Validate

Packaging Plan ID

FA-WI-SP

Retrieve

Aggregate Source

FA Installation Default

Post

Repackaging Plan ID

Repackage

Award Period

Both Academic & Non Std

Reset

Attributes

Award Notification

Award

Status

III

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10		UGRD	911000000000	Federal Pell Grant	7,395.00	7,395.00	01	XX	Disbursement +
40		UGRD	912000000000	Washington College Grant	4,573.00	4,573.00	01	AY	Disbursement +
100		UGRD	913000000000	Tuition Grant	1,500.00	1,500.00	01	AY	Disbursement +
120		UGRD	931000000000	Federal Work Study	9,000.00	0.00	01	AY	Disbursement +
150		UGRD	961000001100	Subsidized Direct Loan 1	3,500.00	0.00	30	L1	Disbursement +
160		UGRD	961000002100	Unsubsidized Direct Loan 1	2,805.00	0.00	30	L1	Disbursement +

### 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\\_fs-a-handbook\\_2023-2024\\_vol1.pdf](https://fsapartners.ed.gov/sites/default/files/2023-2024/2023-2024_Federal_Student_Aid_Handbook/knowledge-center_fs-a-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](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\\_fs-a-handbook\\_2023-2024\\_vol1.pdf](https://fsapartners.ed.gov/sites/default/files/2023-2024/2023-2024_Federal_Student_Aid_Handbook/knowledge-center_fs-a-handbook_2023-2024_vol1.pdf)

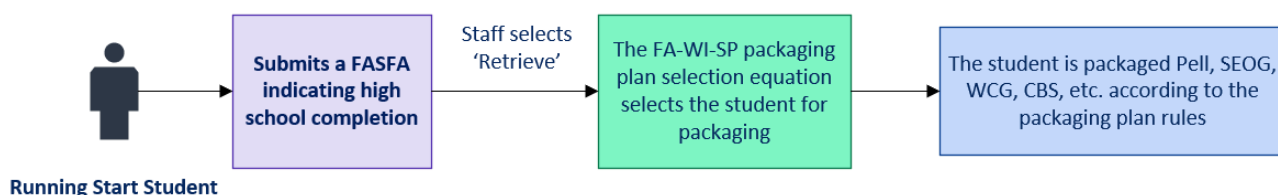
### **Regulatory Language for Running Start Program and Washington College Grant Eligibility**

*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](https://wsac.wa.gov/sites/default/files/2023-24_WCG-CBS_ProgramManual.pdf)

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#### 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.

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#### 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**

##### Student Groups

The screenshot shows the 'Student Groups' interface. At the top, there's a search bar and a filter icon. Below that, the 'Academic Institution Details' section is visible, showing a search bar and a filter icon. The 'Student Group' is set to 'SRSR' (Running Start). The 'Details' section shows the 'Effective Date' as '08/01/2023' and the 'Status' as 'Active'. There is a 'Comments' section at the bottom.

EXCLUDE RS & INCARCERATED STUDENTS FROM PACKAGING SELECTION

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

Student Data - Background Info

State of Residence: WA

Res Prior 18: ☐ Blank ☒ Yes ☐ No

Residency Date:

Degree/Certificate: Other/Undecided

Current Grade Level: 1st yr Never Attended

HS Diploma or Equivalent: ☒ High school diploma ☐ GED ☐ Home schooled ☐ None of the above

High School Name:

High School Code:

High School City:

High School State: WA

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

Student SAP

Term: 2227 FALL 2022

Program: ACADM Academic

Plan: LASDTAA Academic Transfer DTA

Calc SAP Status: MEET Meets SAP

Override SAP Status:

Packaging Status Summary: Meeting Satis Acad Progress

Comments:

SAP Calculation Results

	Test	Used	Actual	Rule Range	Failed	Status	Severity	Exception Used	Term
				From To					
Academic Standing	N			NA NA	<input type="checkbox"/>			NA	
Maximum Attempted Units	N				<input type="checkbox"/>			N	NA
Maximum Attempted Terms	N				<input type="checkbox"/>			N	NA
Minimum Current GPA	N				<input type="checkbox"/>			N	NA
Minimum Cumulative GPA	N				<input type="checkbox"/>			N	NA

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

Aid Year: 2024 2023-2024 Financial Aid Year

Package Status: Applied

Aggregate Source: FA Installation Default

Award Period: Both Academic & Non Std

Package Plan ID: FA-WI-SP

Repackaging Plan ID:

Attributes

NUM	Action	Career	Item Type	Description	Offered	Accepted	Disbursement Plan	Split Code	
10	Q	UGRD	911000000000	Federal Pell Grant	7,395.00	7,395.00	01	XX	Disbursement +
40	Q	UGRD	912000000000	Washington College Grant	4,573.00	4,573.00	01	AY	Disbursement +
100	Q	UGRD	913000000000	Tuition Grant	1,500.00	1,500.00	01	AY	Disbursement +
150	Q	UGRD	961000001100	Subsidized Direct Loan 1	3,500.00	0.00	30	L1	Disbursement +
160	Q	UGRD	961000002100	Unsubsidized Direct Loan 1	6,000.00	0.00	30	L1	Disbursement +

## EXCLUDE RS & INCARCERATED STUDENTS FROM PACKAGING SELECTION

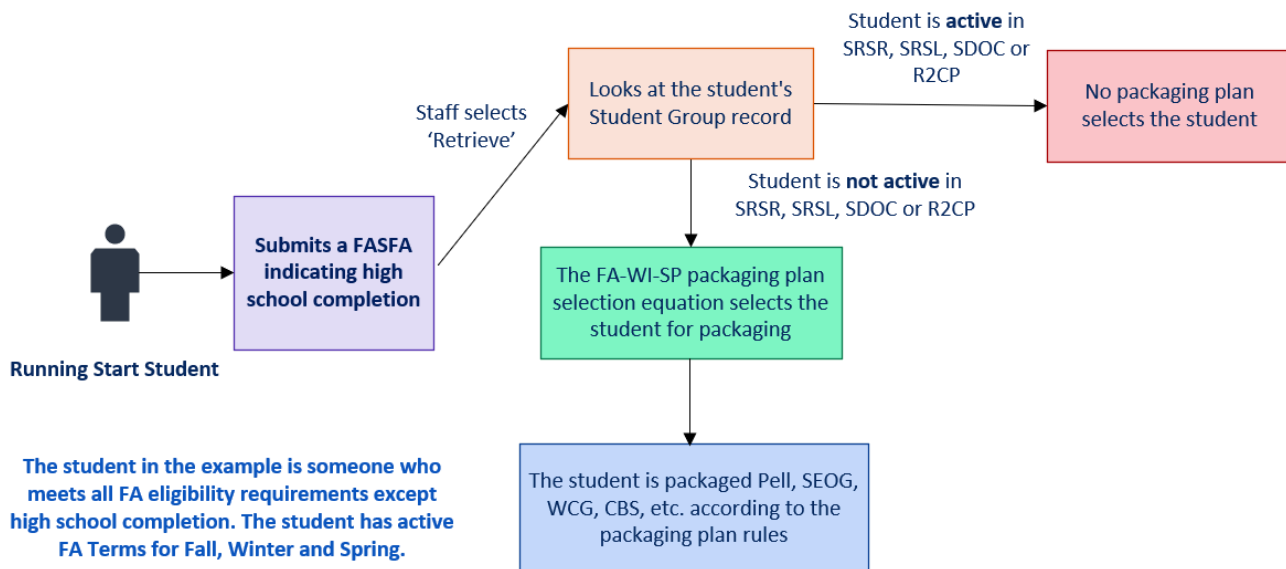
### PROPOSED SOLUTION

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



# EXCLUDE RS & INCARCERATED STUDENTS FROM PACKAGING SELECTION

## 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_GRP_HIST A
WHERE ( EXISTS (SELECT 'X'
FROM PS_STDNT_GRP_HIST B
WHERE B.EFFDT =
(SELECT MAX(B_ED.EFFDT) FROM PS_STDNT_GRP_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_GRP_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

ExclStdGp

\*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
<input type="checkbox"/>	1	Assign	Local Variable	SQL_RC	
<input type="checkbox"/>	2		Number	0.0000000000	
<input type="checkbox"/>	3	End Assign			
<input type="checkbox"/>	4	Assign	Local Variable	SQL_COUNT	
<input type="checkbox"/>	5		Number	0.0000000000	
<input type="checkbox"/>	6	End Assign			
<input type="checkbox"/>	7	Assign	Local Variable	LOCAL_INSTITUTION	
<input type="checkbox"/>	8		Global Variable	INSTITUTION	
<input type="checkbox"/>	9	End Assign			
<input type="checkbox"/>	10	Assign	Local Variable	LOCAL_EMPLID	
<input type="checkbox"/>	11		Global Variable	EMPLID	
<input type="checkbox"/>	12	End Assign			
<input type="checkbox"/>	13	Assign	Local Variable	ACTIVE_IN_ST_GRP	
<input type="checkbox"/>	14		String		
<input type="checkbox"/>	15	End Assign			
<input type="checkbox"/>	16	Call	SQL	CTC_FA_RS_DOC_CHECK	
<input type="checkbox"/>	17	Call Params			
<input type="checkbox"/>	18		Local Variable	SQL_RC	

Application Prompts

Personalize | Find | View All | 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

## EXCLUDE RS & INCARCERATED STUDENTS FROM PACKAGING SELECTION

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, SRSR - 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

Equation Editor

Equation Name: CTCFAPFAWISP

Find | View All First 1 of 2 Last

\*Eff Date: 08/21/2023 ☐ Active ☐ Enable Preview Results

Short Desc: PlanSelFWS \*Descr: Plan Select Fa Wi Sp

Compile Status: Successfully Parsed

Equation Edit Function:

Equation Detail

Find | View All First 1-18 of 94 Last

Sel	Line	Keyword	Operand Type	Operand	Comment
<input type="checkbox"/>	1	Skip			
<input type="checkbox"/>	2	Assign	Global Variable	A_SELECT	
<input type="checkbox"/>	3		String	F	
<input type="checkbox"/>	4	End Assign			
<input type="checkbox"/>	5	Skip			
<input type="checkbox"/>	6	Call	Equation	CTCFAEXCLUDE	
<input type="checkbox"/>	7	If			
<input type="checkbox"/>	8		Global Variable	EXCLUDE_STUDENT	
<input type="checkbox"/>	9	=			
<input type="checkbox"/>	10		String	A	
<input type="checkbox"/>	11	Then			
<input type="checkbox"/>	12	Return			
<input type="checkbox"/>	13	End If			
<input type="checkbox"/>	14	Assign	Local Variable	SQL_RC	
<input type="checkbox"/>	15		Number	0.0000000000	
<input type="checkbox"/>	16	End Assign			
<input type="checkbox"/>	17	Assign	Local Variable	SQL_COUNT	
<input type="checkbox"/>	18		Number	0.0000000000	

Application Prompts

Personalize | Find | View All | 1 of 1 Last

\*Application Prompt ID

1 | Fin Aid Packaging Select Eqtns

The student will leave the equation engine if the EXCLUDE\_STUDENT value is 'Y'.



## EXCLUDE RS & INCARCERATED STUDENTS FROM PACKAGING SELECTION

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### 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>)

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### 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.