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Sending ISIR Corrections

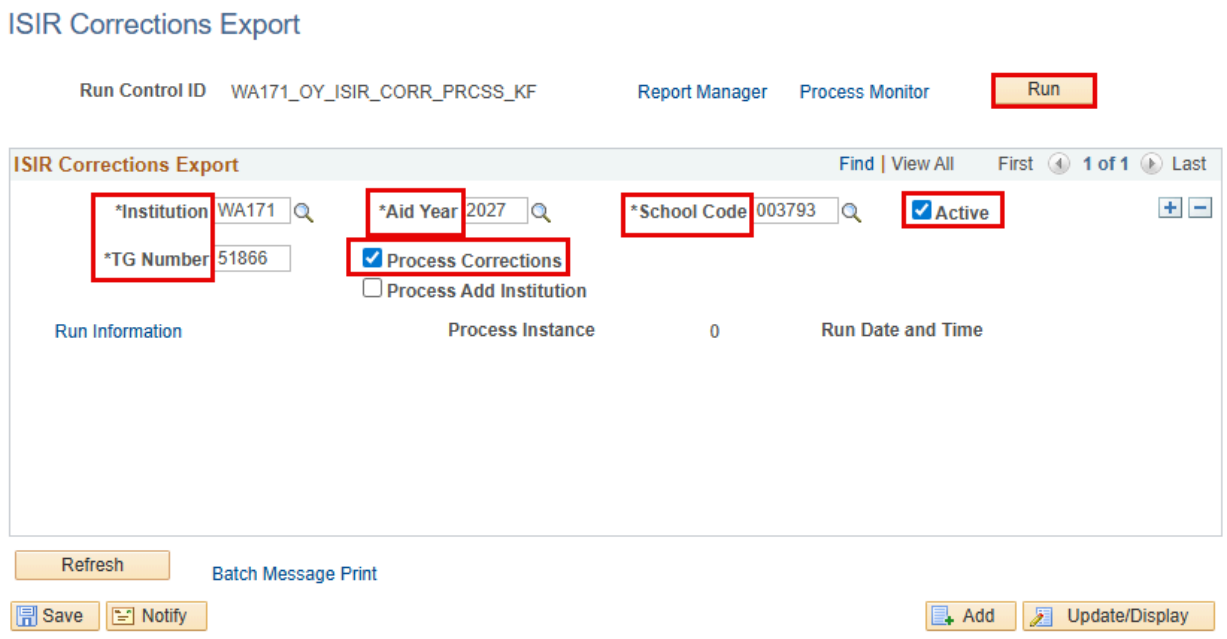
Navigation	Description
Financial Aid > File Management > ISIR Corrections > Process ISIR Corrections	ctcLink is used to process ISIR corrections. Creates files and sends to staging tables.

NOTE: *Until further notice, due to the FAFSA Simplification changes, for the 2025/2026 and 2026/2027 Aid Year (AY), ISIR Corrections will not be processed in ctcLink, but rather, corrections are made directly in the FAA Partner Portal – FPS. When ctcLink can process ISIR corrections again, this verbiage will be updated. Verbiage Last Updated -* ***February 2026***

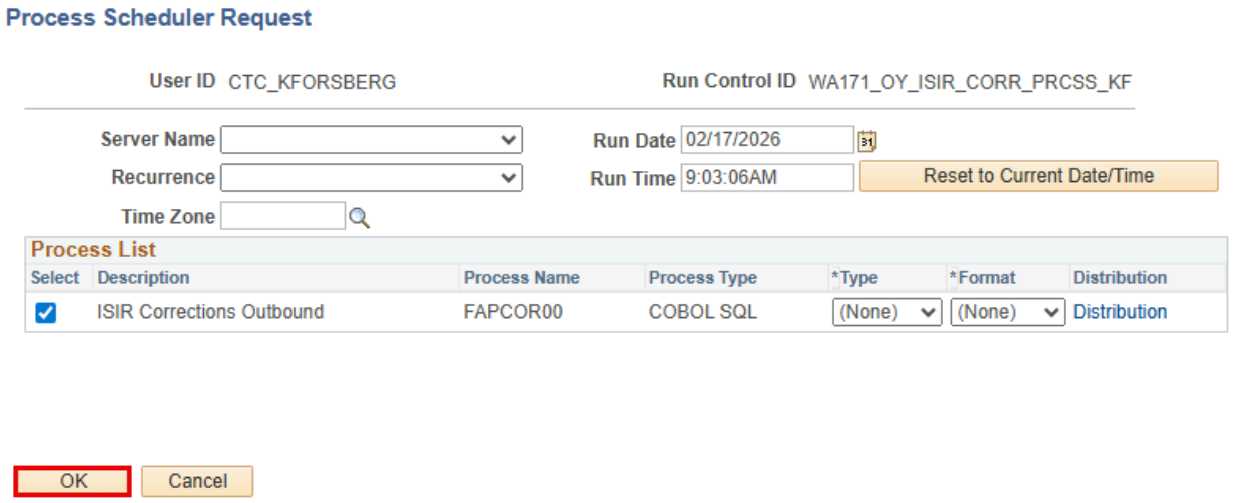
This process is part of your nightly ISIR JobSet, but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Enter the following**
    a. **Institution**
    b. **Aid Year**
    c. **School Code**
    d. **TG Number**
3. **Select the 'Active' box**
4. **Select 'Process Corrections'**

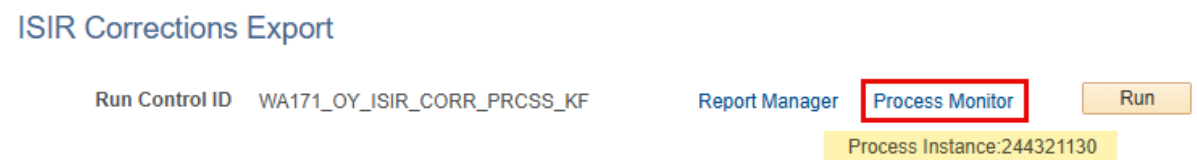
Select Run



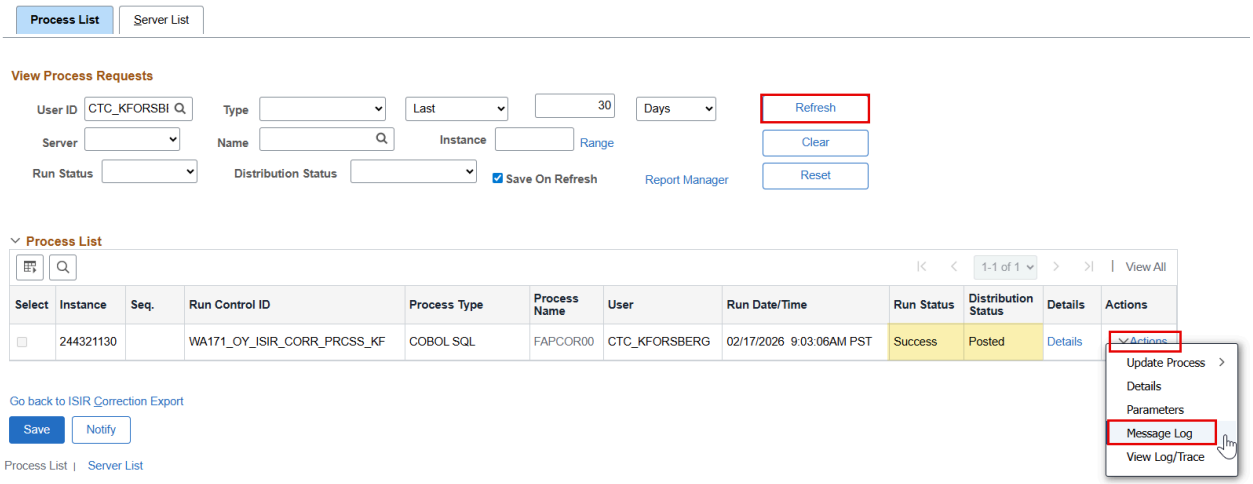
Select OK from Process Scheduler Request page



Select Process Monitor from the ISIR Corrections Export page



Ensure process runs to Success and Posted
Select the 'Actions' link and then select the Message Log option from the drop-down list



Locate and note the FAPCOR00 Batch Number for review

Message Log

Process

Instance: 203829170 **Type:** COBOL SQL

Name: FAPCOR00 **Description:**

1-9 of 9 | View All

Severity	Log Time	Message Text	Explain
10	2:44:29PM	FAPCOR00 : Begin program execution at 14.44.29.480000 on 2025-06-26	Explain
10	2:44:29PM	FAPCOR00 : Processing BATCH NUMBER #C600379320250626144429 Starting	Explain
10	2:44:32PM	FAPCOR00 : ECQUEUEINST Rec Created for ECTRANSID = CORR26IN	Explain
10	2:44:33PM	FAPCOR00 : TOTAL Number of Records Processed...: 00002	Explain
10	2:44:33PM	FAPCOR00 : TOTAL Number of Records In Error.....: 00000	Explain
10	2:44:33PM	FAPCOR00 : Processing For BATCH NUMBER #C600379320250626144429 completed	Explain
10	2:44:33PM	FAPCOR00 : TOTAL Records Processed For BATCH NUMBER #C600379320250626144429 = 00002	Explain
10	2:44:33PM	FAPCOR00 : End program execution at 14.44.33.260000 on 2025-06-26	Explain
	2:44:44PM	Successfully posted generated files to the report repository	Explain

Return

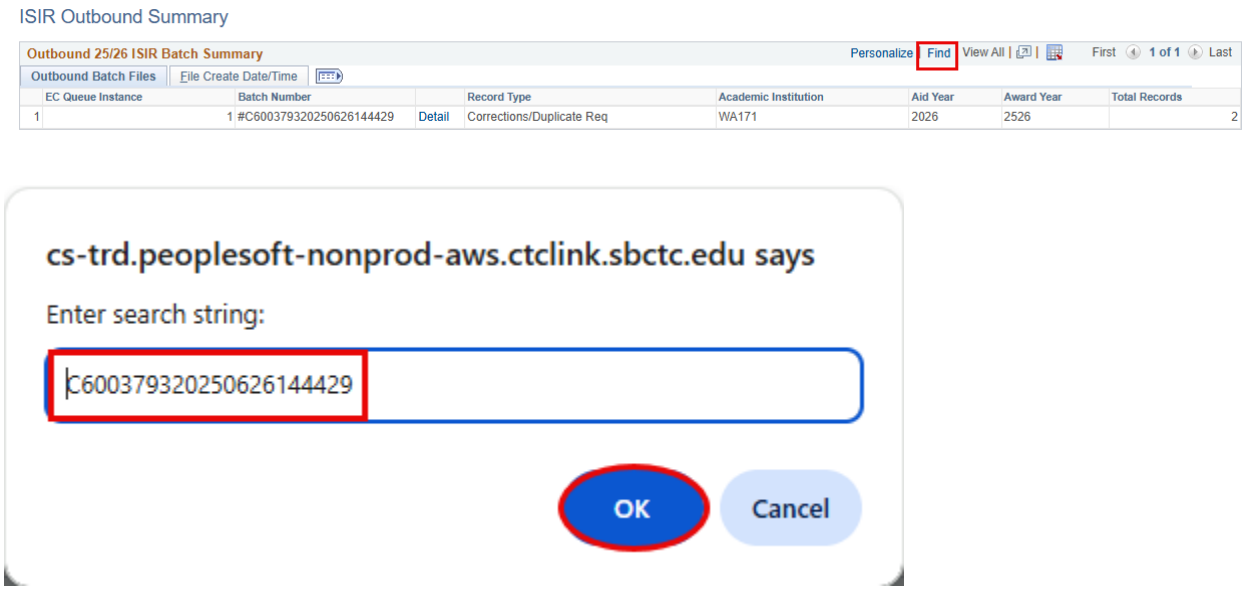
Viewing Outbound Corrections

Navigation	Description

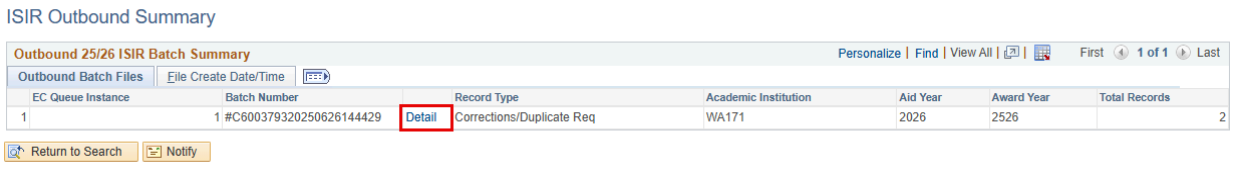
Financial Aid > File Management > ISIR Corrections > View 20xx-20xx Outbound Files	Review of Corrections being sent out.

__NOTE:__ Until further notice, due to the FAFSA Simplification changes, for the 2025/2026 and 2026/2027 Aid Year (AY), ISIR Corrections will not be processed in ctcLink, but rather, corrections are made directly in the FAA Partner Portal – FPS. When ctcLink can process ISIR corrections again, this verbiage will be updated. Verbiage Last Updated - __February 2026__

1. **Select the Search button to do an open search**
2. **Select the Find button**
3. **Enter the Batch Number from previous process into the Search String**
4. **Select OK**

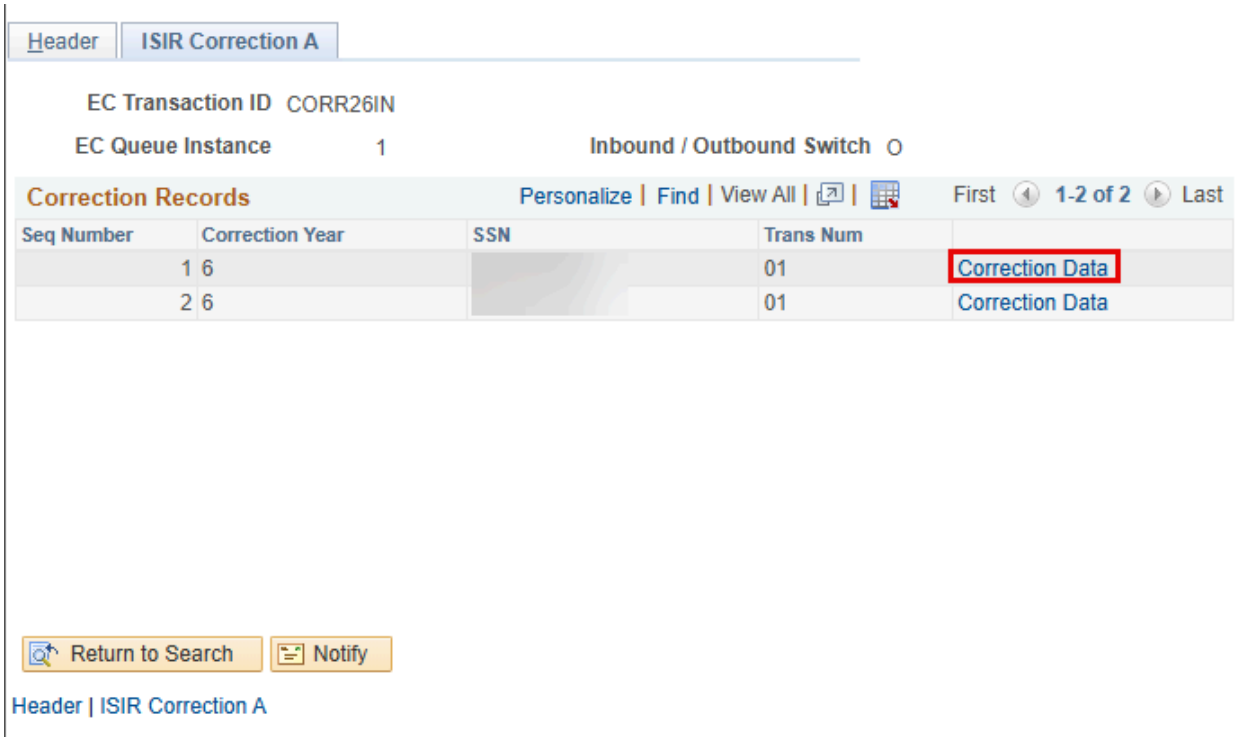


Select the Detail Link to view Outbound File Data



The Header Tab contains file data

The ISIR Correction A tab will have the list of students included in the batch with Correction Data links to review correction details



Corrected Fields/Overrides

EC Queue Instance 1 EC Transaction ID CORR26IN Sequence Number 1

Corrected Fields

FPS CORR #	Correction Data
Field Nbr 1 017	1
Field Nbr 2	
Field Nbr 3	
Field Nbr 4	
Field Nbr 5	
Field Nbr 6	
Field Nbr 7	
Field Nbr 8	
Field Nbr 9	
Field Nbr 10	
Field Nbr 11	
Field Nbr 12	

Additional Correction Fields

Serial Number 00001

EDE Federal School Code 003793 Transaction Receipt Date 06/26/2025

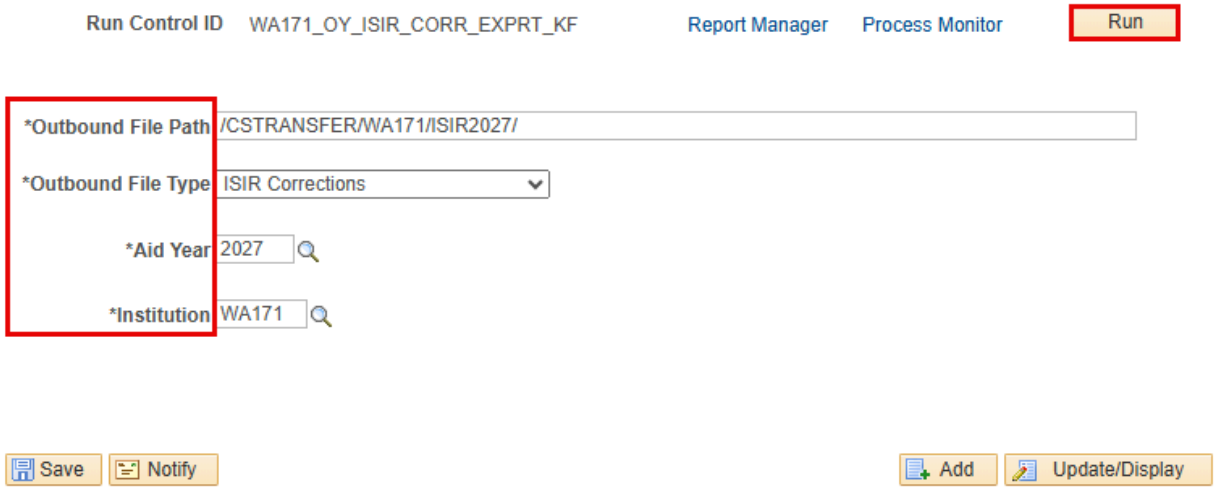
Return

Exporting Corrections

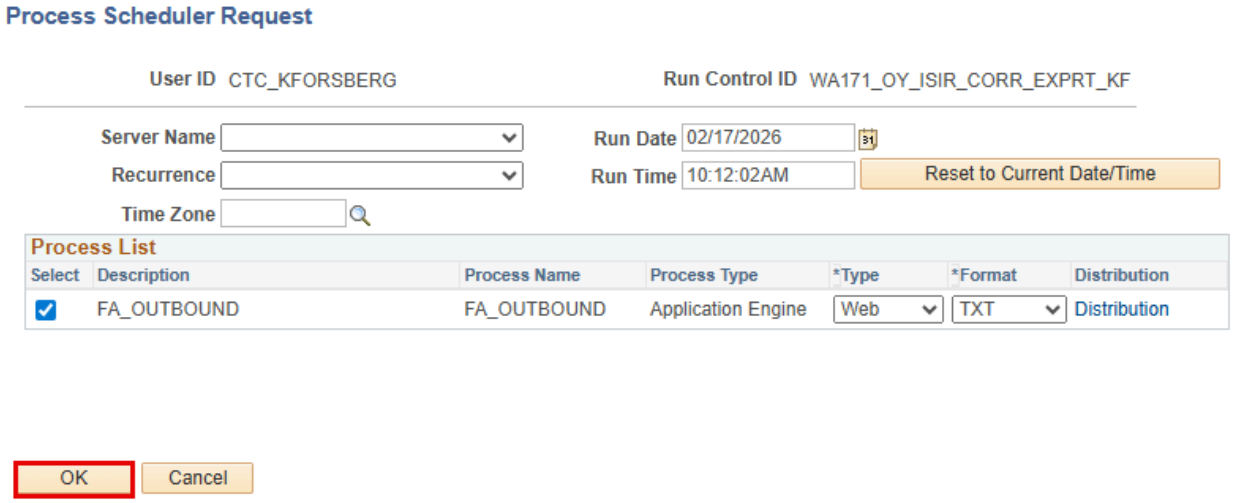
Navigation	Description
Financial Aid > File Management > Create Federal Data Files	Exporting corrections made in ctcLink. This step moves the data to a staging table in preparation of creating a file for EdConnect

NOTE: *Until further notice, due to the FAFSA Simplification changes, for the 2025/2026 and 2026/2027 Aid Year (AY), ISIR Corrections will not be processed in ctcLink, but rather, corrections are made directly in the FAA Partner Portal – FPS. When ctcLink can process ISIR corrections again, this verbiage will be updated. Verbiage Last Updated -* ***February 2026***

1. **Enter New or use existing Run Control ID**
2. **Enter the following**
    a. **Outbound File Path**
    b. **Outbound File Type**
    c. **Aid Year**
    d. **Institution**
3. **Select Run**



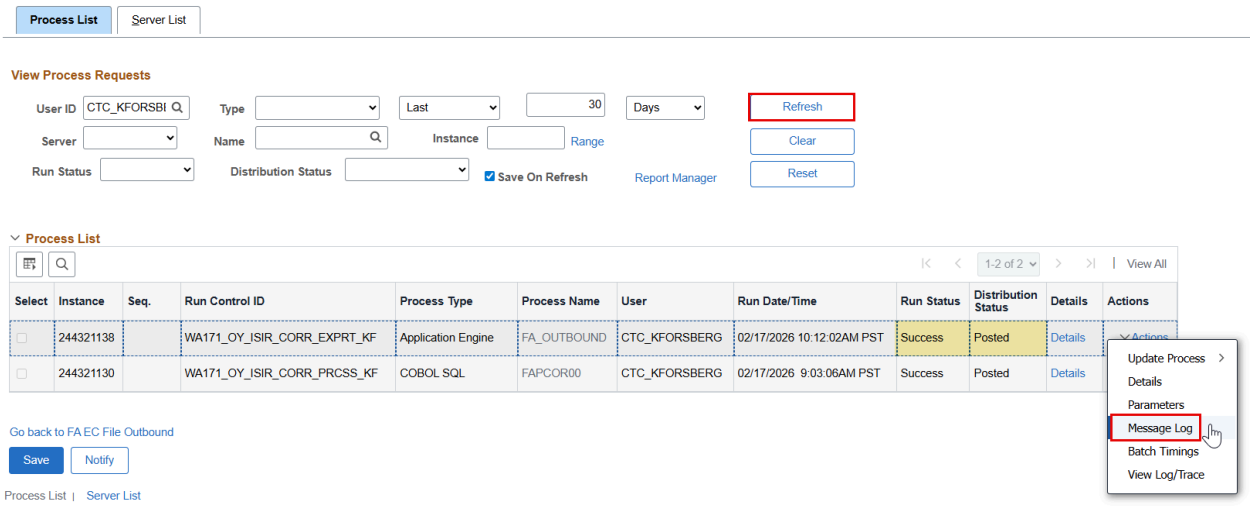
Select OK from the Process Scheduler Request page



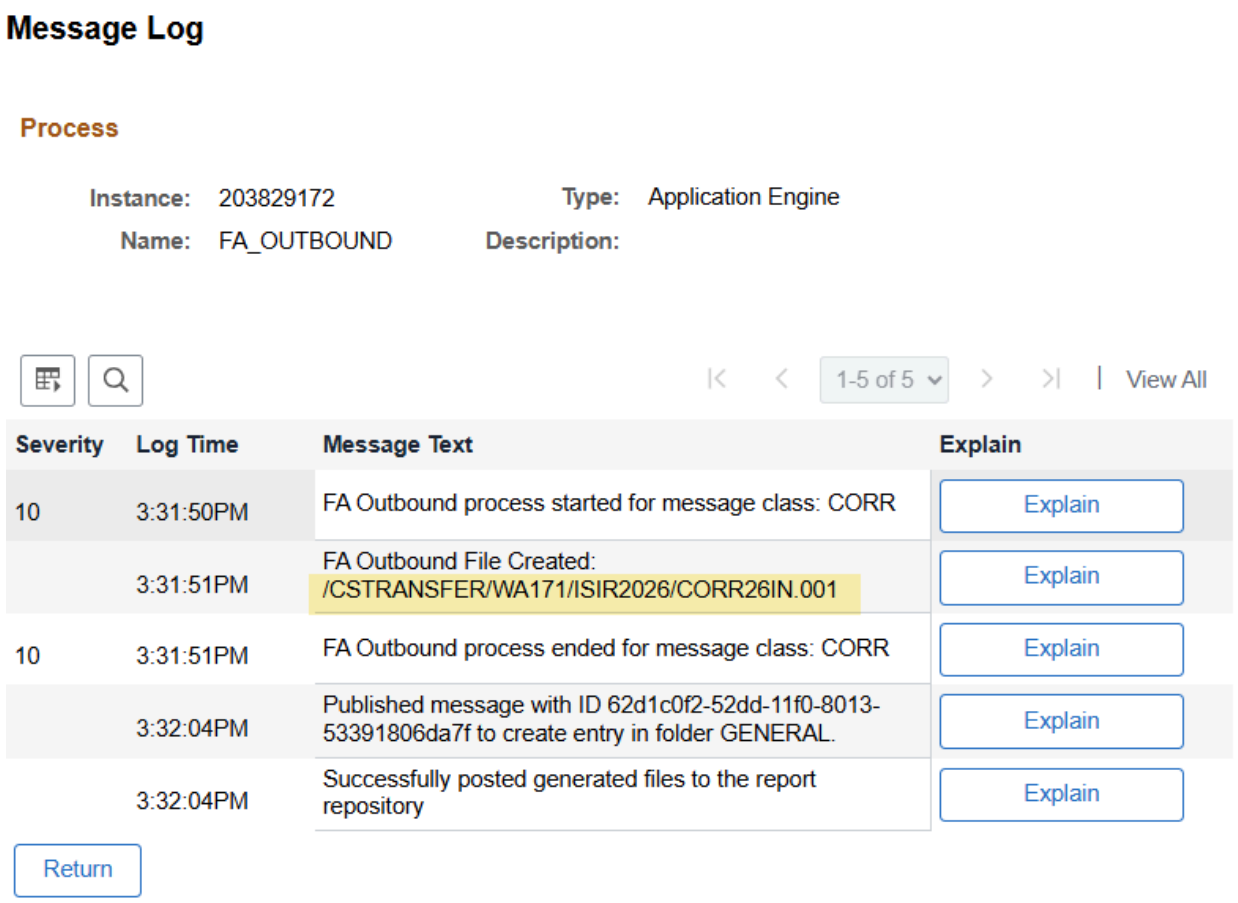
Select Process Monitor and ensure process runs to Success and Posted



Select the Actions link and then select the Message Log option



Locate the File Name and note it; it will be used in the download step



Message Log

Process

Instance: 203829172 Type: Application Engine

Name: FA_OUTBOUND Description:

1-5 of 5 | View All

Severity	Log Time	Message Text	Explain
10	3:31:50PM	FA Outbound process started for message class: CORR	Explain
	3:31:51PM	FA Outbound File Created: /CSTRANSFER/WA171/ISIR2026/CORR26IN.001	Explain
10	3:31:51PM	FA Outbound process ended for message class: CORR	Explain
	3:32:04PM	Published message with ID 62d1c0f2-52dd-11f0-8013-53391806da7f to create entry in folder GENERAL.	Explain
	3:32:04PM	Successfully posted generated files to the report repository	Explain

Return

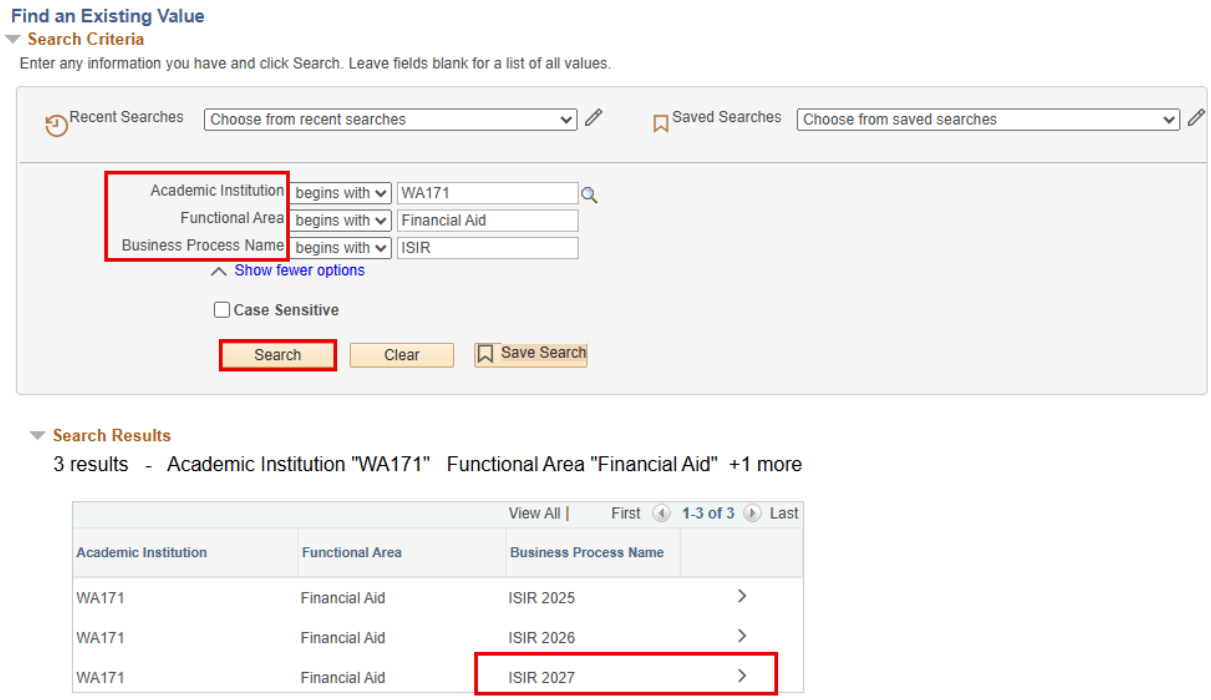
Use the Upload/Download process to download the file to desktop or other file management source

Upload/Download Process for ISIR Corrections

Navigation	Description
PeopleTools > CTC Custom > Extensions > Upload/Download Files	Downloading ISIR corrections. This step moves the data from the staging table and then creates a compatible file that needs to be exported to EdConnect.

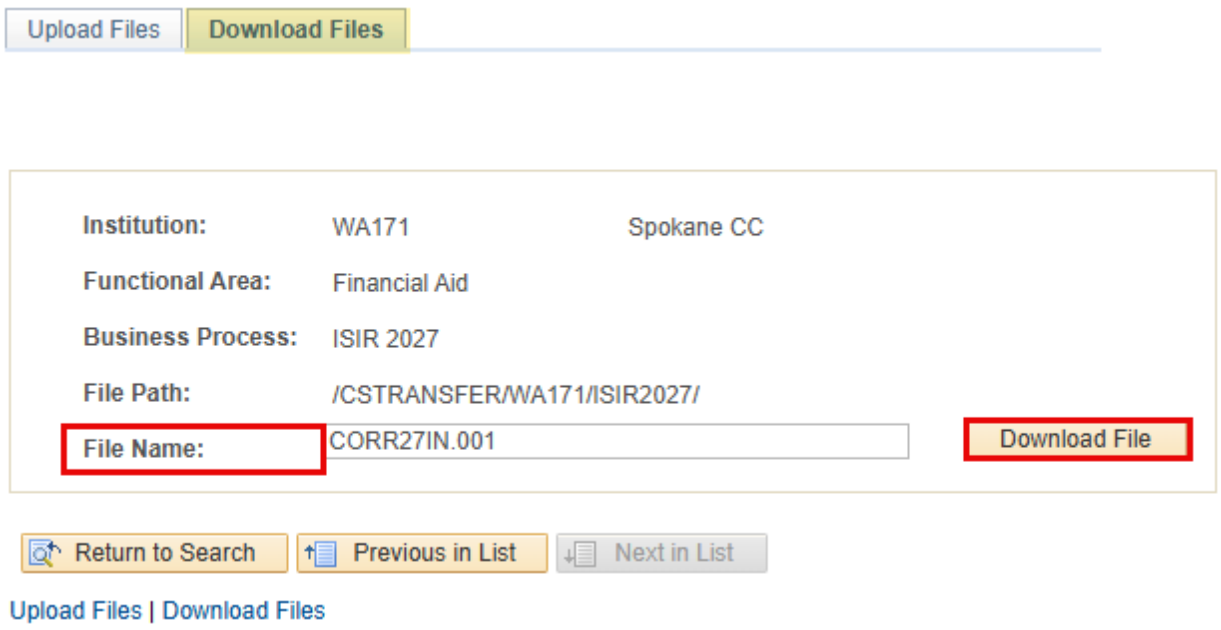
NOTE: *Until further notice, due to the FAFSA Simplification changes, for the 2025/2026 and 2026/2027 Aid Year (AY), ISIR Corrections will not be processed in ctcLink, but rather, corrections are made directly in the FAA Partner Portal – FPS. When ctcLink can process ISIR corrections again, this verbiage will be updated. Verbiage Last Updated -* ***February 2026***

1. **Enter Academic Institution**
2. **Functional Area – Financial Aid**
3. **Business Process Name - ISIR**
4. **Select Search**
5. **Select the ISIR year in which you are processing (ISIR 20xx)**



💡 ***Tip!*** **Locate File Path from the list used in prior processing**

Select the Download File tab
Enter the File Name created in prior processing (Found in the Message Text)
Select the Download File button



Save File to computer for exporting to FPS

Importing and Processing ISIR Files

Colleges have the option to load ISIRs individually or combined in a batch process.

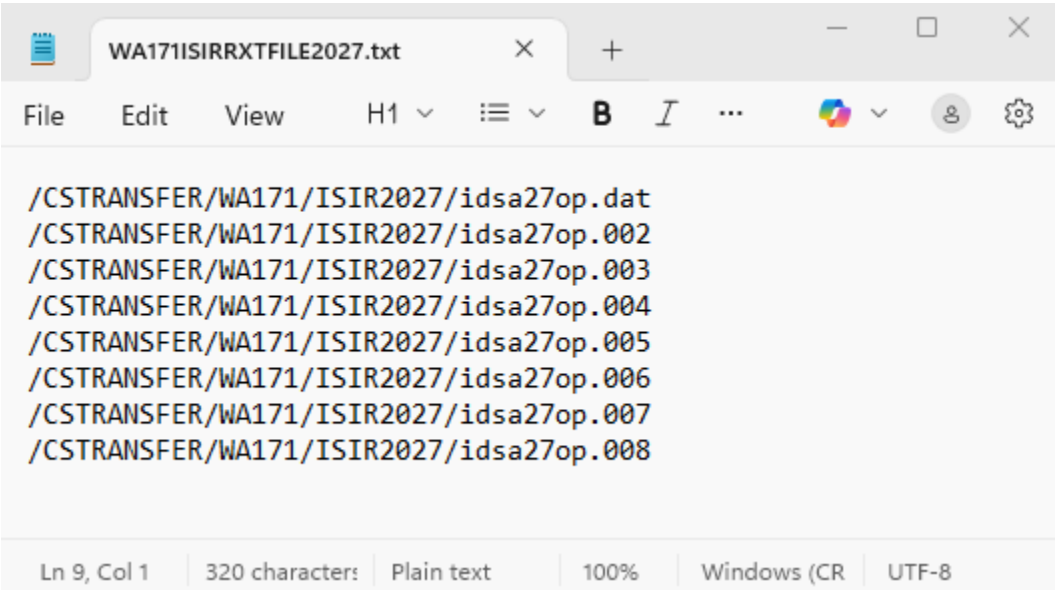
Combining ISIR Files from CPS

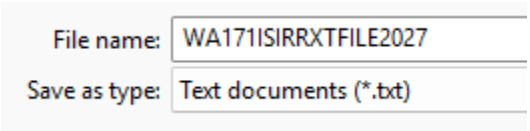
The process to bring in ISIR files from CPS remains the same. From EDconnect, users will save files to their local network drive.

Create a text file (.txt) to batch the files for using the Upload/Download process in PeopleSoft.

1. **Open Notepad from your computer and list the file path and desired files (see screen shot) to include in the batch process. Be sure to include the extension in the file name.**
2. **Save the file to your local network drive.**

(*Note – A good business practice could include saving the files from FPS and the text file in the same network drive. Using dates at the end of the file can help users identify files quickly when troubleshooting.)





Upload/Download Process

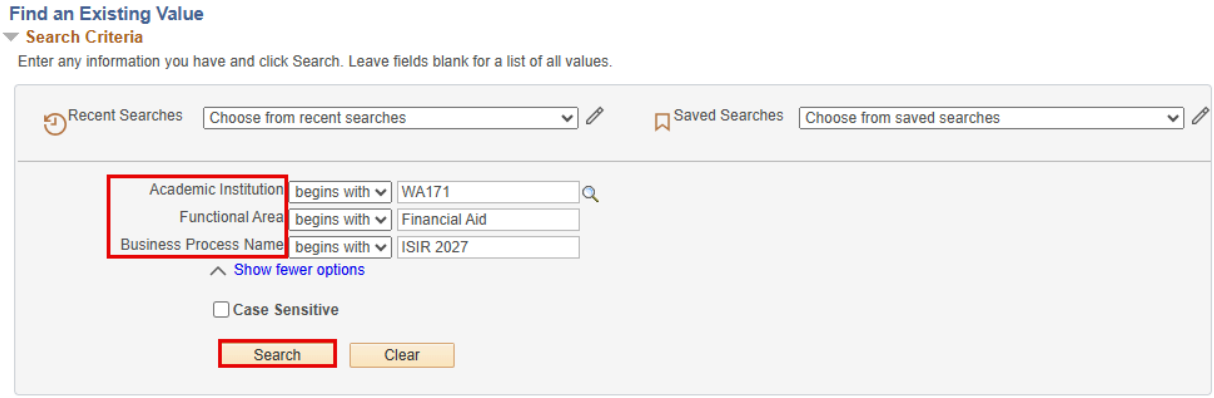
All ISIR files need to be processed through the upload process regardless of using the individual or combined method. *The combined method is recommended.*

Navigation	Description
PeopleTools > CTC Custom > Extensions > Upload/Download Files	**To Upload or Download files colleges will need to use the File Upload/Download Function**

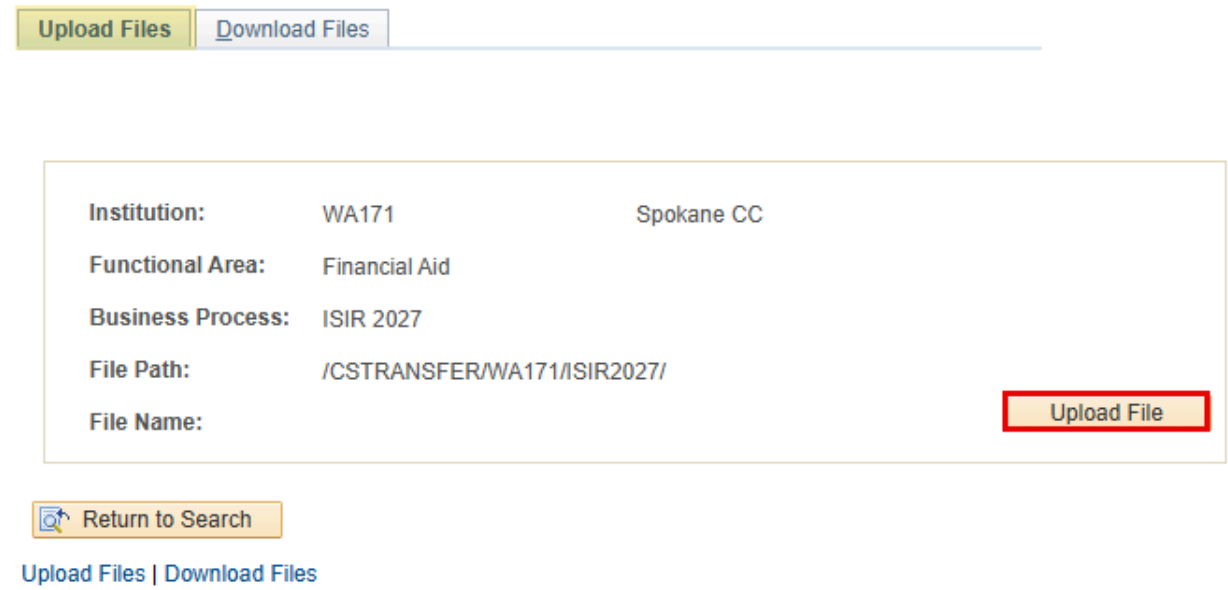
💡 ***Tip!*** *When loading ISIRs for the first time in the new Aid Year, the FA Office's Destination Point Administrator (DPA) enrolled for batch FAFSA services can request a year-to-date ISIR file from the FAFSA Partner Portal (FPP) to load into ctcLink. Subsequent ISIR files can be loaded via the combined process after the year-to-date file is loaded.*

1. **Enter Academic Institution**
1. **Functional Area – Financial Aid**
2. **Business Process Name – ISIR 20xx, *xx = processing year***

Select Search

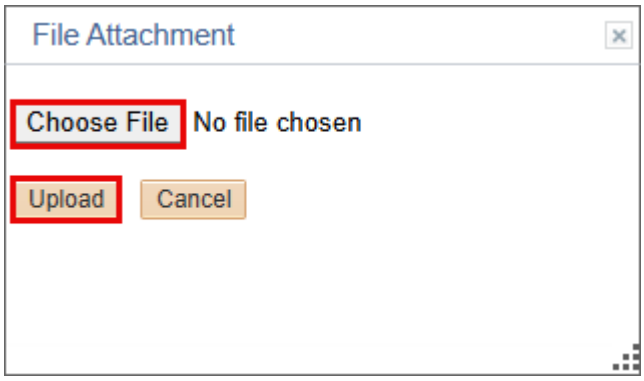


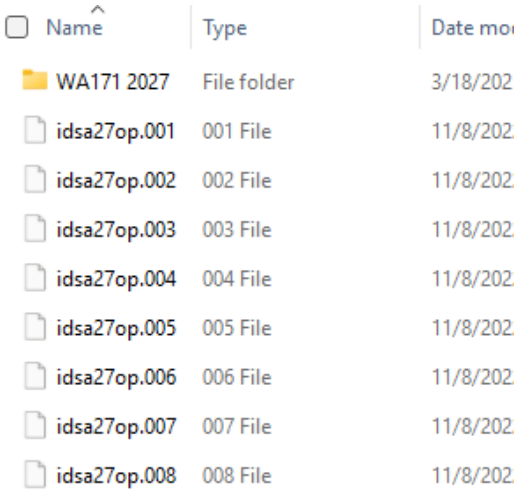
From the Upload Files tab select Upload File



Choose the desired file

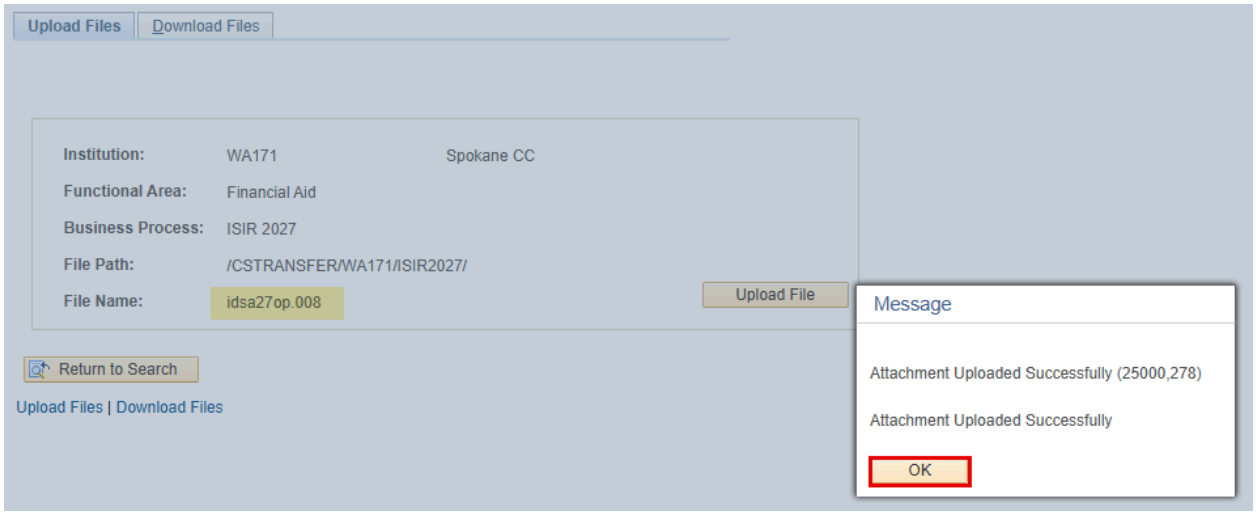
1. **Select the Browse button to select the file**
2. **Select the Upload button**





***Note – ISIR Files need to be uploaded one at a time as well as the text file needs to be uploaded if using the combined process**

The file will be uploaded and the File Name will appear, select OK to continue



***Remember* to also upload the .txt file if using the combined process!**

Process Complete

FA Inbound

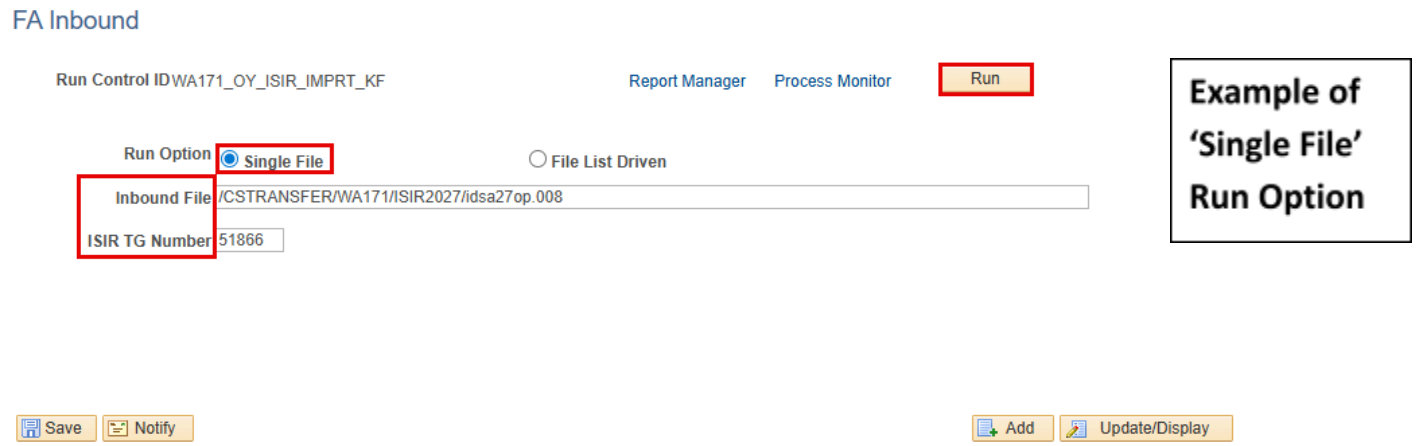
Navigation	Description
Financial Aid > File Management > Import Federal Data Files	**The FA Inbound process automatically determines the type of file from CPS and loads the file into the inbound staging tables.**

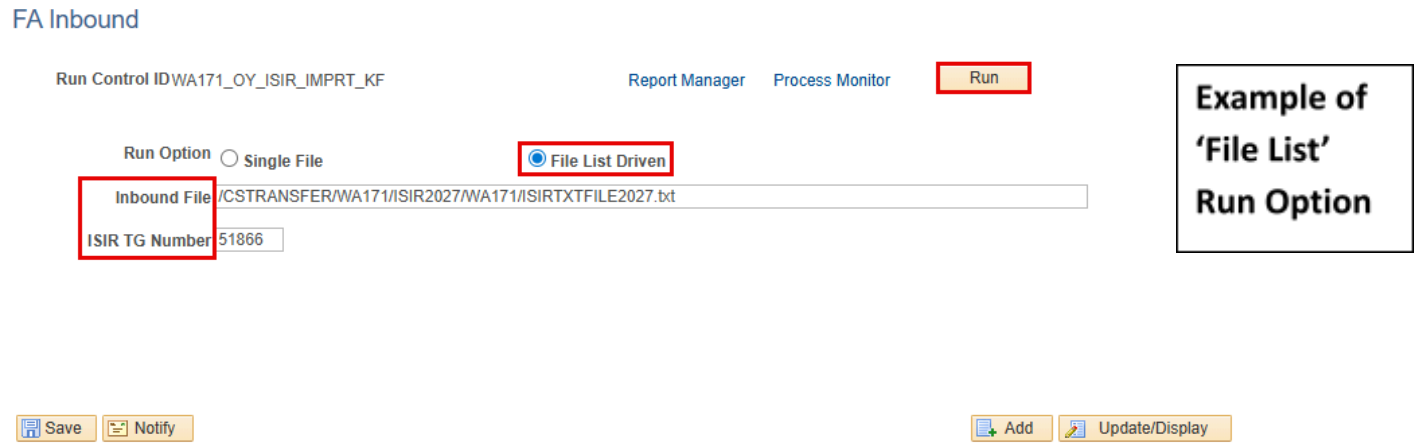
This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Choose 'Single File' radio button when loading single files**

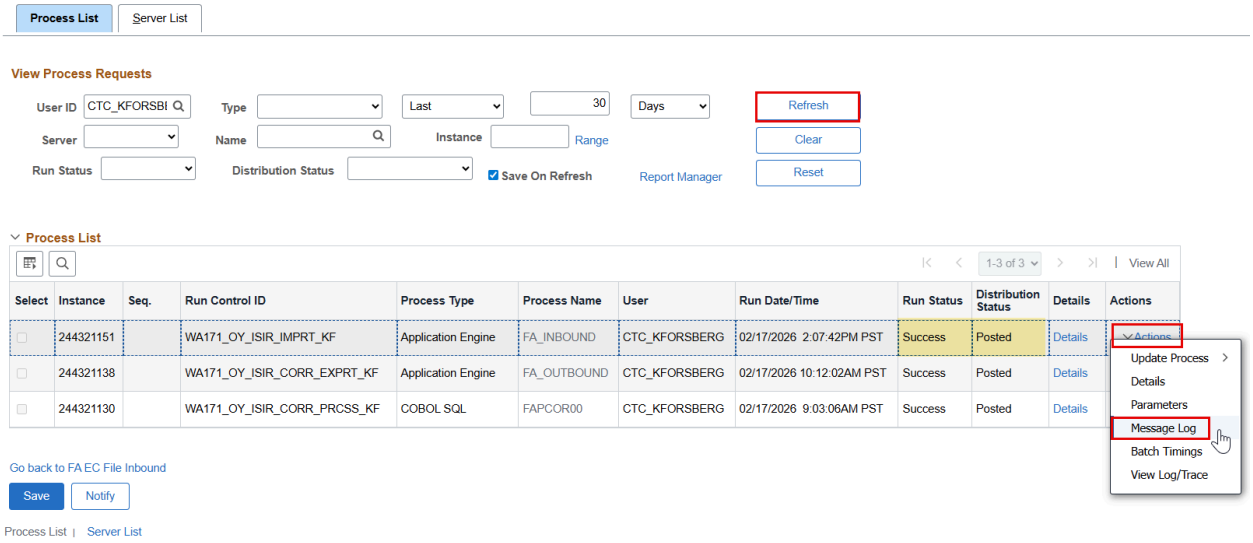
3. **Choose 'File List' radio button when loading combined files**
4. **Insert 'Inbound File' name (*Note - "File Path" and "File Name" from FTP)**
5. **Insert ISIR TG Number**

Select Run and OK from the Process Scheduler Request page





Select Process Monitor
You may select 'Refresh' until the Run Status reads 'Success' and Distribution Status reads 'Posted'


Process List
Server List
View Process Requests
User ID
CTC_KFORSBI
Type
Last
30
Days
Refresh
Server
Name
Instance
Range
Clear
Run Status
Distribution Status
Save On Refresh
Report Manager
Reset
Process List
1-3 of 3
View All
Select
Instance
Seq.
Run Control ID
Process Type
Process Name
User
Run Date/Time
Run Status
Distribution Status
Details
Actions
244321151
WA171_OY_ISIR_IMPRT_KF
Application Engine
FA_INBOUND
CTC_KFORSBERG
02/17/2026 2:07:42PM PST
Success
Posted
Details
Actions
244321138
WA171_OY_ISIR_CORR_EXPRT_KF
Application Engine
FA_OUTBOUND
CTC_KFORSBERG
02/17/2026 10:12:02AM PST
Success
Posted
Details
244321130
WA171_OY_ISIR_CORR_PRCSS_KF
COBOL SQL
FAPCOR00
CTC_KFORSBERG
02/17/2026 9:03:06AM PST
Success
Posted
Details
Update Process
Details
Parameters
Message Log
Batch Timings
View Log/Trace
Go back to FA EC File Inbound
Save
Notify
Process List | Server List

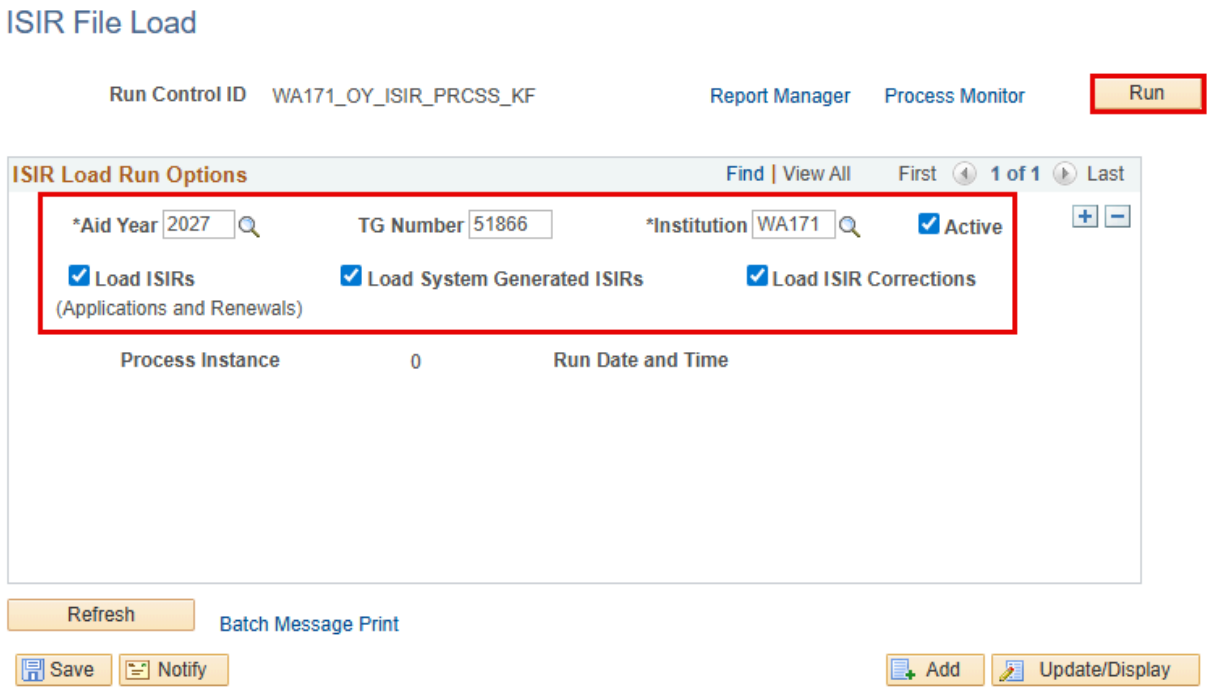
Process Imported ISIRs

Navigation	Description
Financial Aid > File Management > ISIR Import > Process ISIRs	**Load the ISIR records from the ISIR staging tables into the database using the rules that are set up in the ISIR Data Load Parms page.**

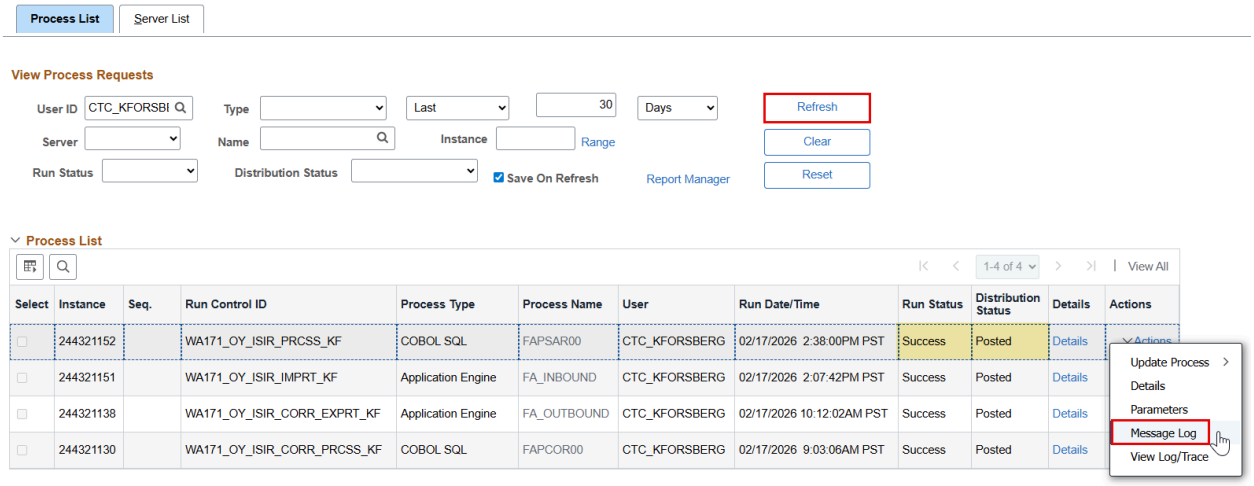
This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Select Aid Year**
3. **Select Institution ID**
4. **Enter TG Number**
5. **Check 'Active' 'Load ISIRs' 'Load System Generated ISIRs' 'Load Correction' boxes**

Select Run and OK from the Process Scheduler Request screen



Select Process Monitor
Select 'Refresh' until the Run Status reads 'Success' and Distribution Status reads 'Posted'



Select the 'Details' link then 'Message Log' link to view messages regarding the process'

Message Log

Process

Instance: 244321152 Type: COBOL SQL

Name: FAPSAR00 Description:

1-50 of 2385 View 100

Severity	Log Time	Message Text	Explain
10	2:38:11PM	FAPSAR00 : Begin program execution at 14.38.11.680000 on 2026-02-17	Explain
10	2:41:40PM	FAPSAR00 : Processing ECQUEUEINSTANCE 000000165, CPS Record Type = (YR-2027)	Explain
10	2:41:40PM	FAPSAR00 : Number of Records Read.....: 00004	Explain
10	2:41:40PM	FAPSAR00 : Number of Records Loaded.....: 00000	Explain
10	2:41:40PM	FAPSAR00 : Number of Changes Processed .....: 00000	Explain
10	2:41:40PM	FAPSAR00 : Number of Records Suspended.....: 00004	Explain
10	2:41:40PM	FAPSAR00 : Number of Records Skipped.....: 00000	Explain
10	2:41:40PM	FAPSAR00 : Number of Records In Error.....: 00000	Explain
10	2:41:40PM	FAPSAR00 : Processing For ECQUEUEINSTANCE 000000165 completed (YR-2027)	Explain
10	2:41:40PM	FAPSAR00 : Processing ECQUEUEINSTANCE 000000166, CPS Record Type = (YR-2027)	Explain

Suspended ISIRs

Navigation	Description
Reporting Tools > Query > Schedule Queries	**This query is designed to show suspended ISIRs from the most recent load processes.**

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If running ad hoc, select the Run button.

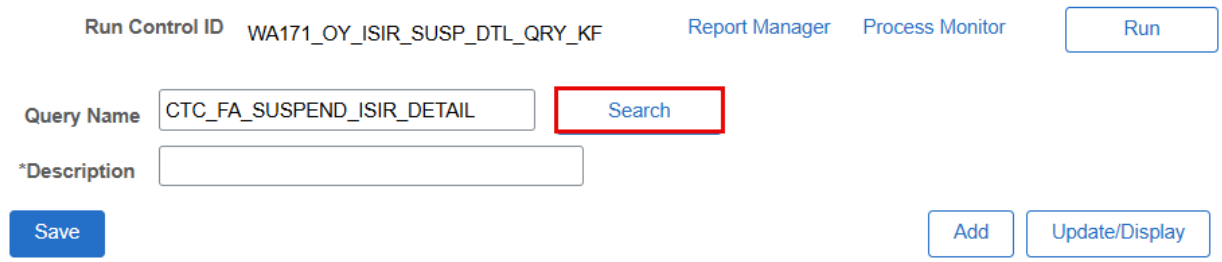
Due to the large amount of data that could potentially be returned, you will need to use Schedule Queries instead of Query Viewer.

Identify suspended ISIRs by running the following query using:

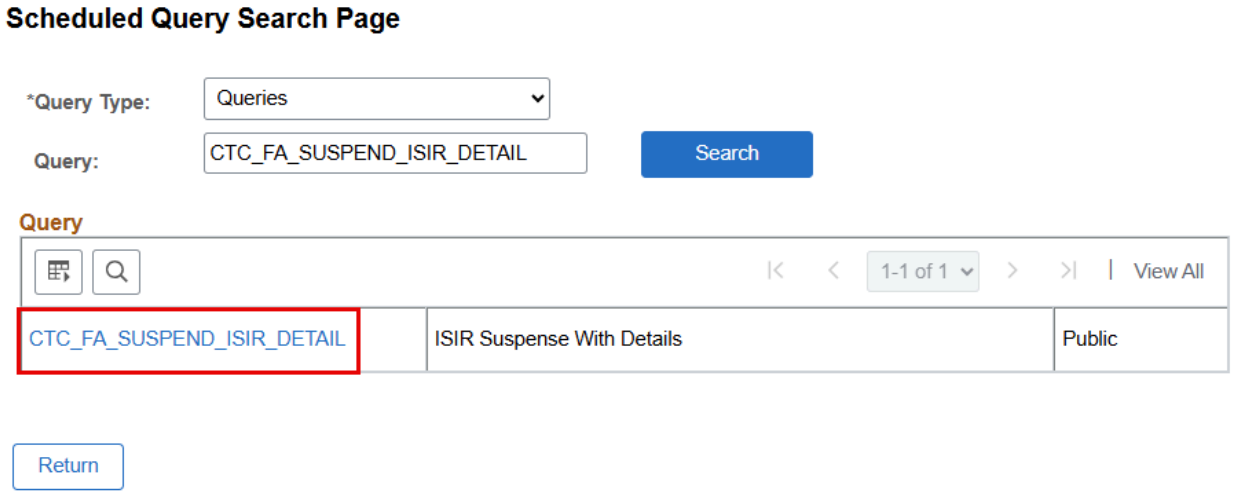
CTC_FA_SUSPEND_ISIR_DETAIL

Use a New or Existing Run Control ID

Enter the query name and select Search



Select the blue link for the desired query

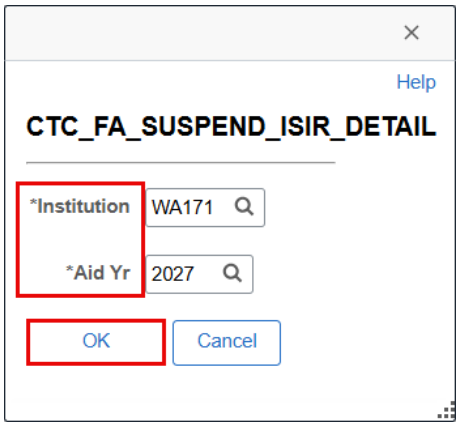


Edit Prompts will appear

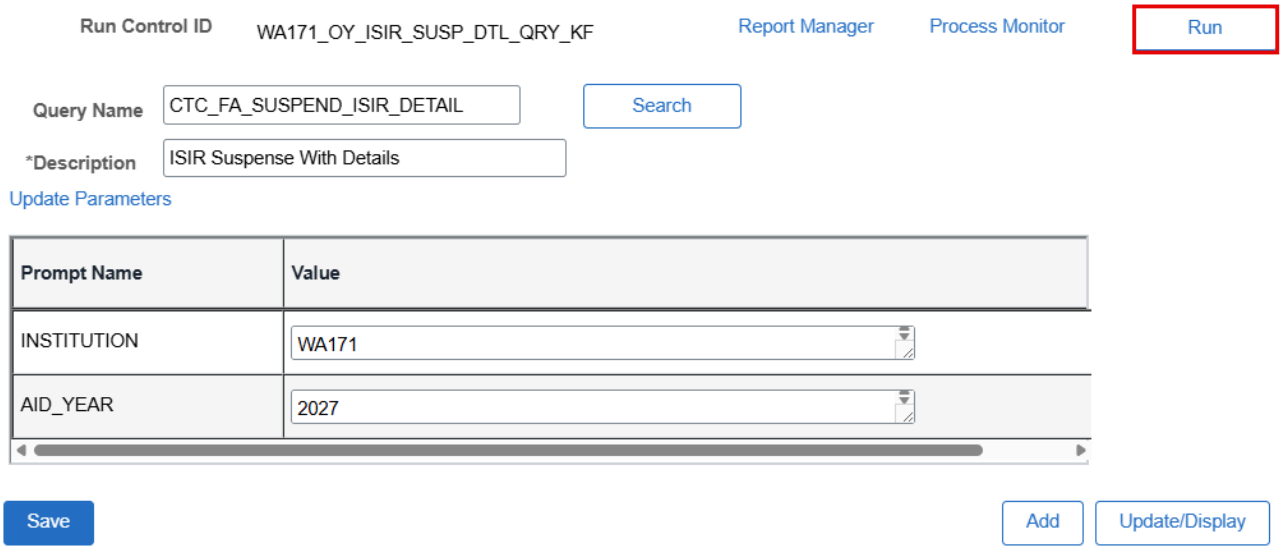
Enter the following:

- **Institution**
- **Aid Year**

Select OK



From the Schedule Queries page select Run



Ensure the Process Monitor reads “Success” and “Posted” select Details link

From the View Log/Trace file select the Query name with .csv to open with Excel

View Log/Trace

Report

Report ID	22176111	**Process Instance**	244321153	Message Log
Name	PSQUERY	**Process Type**	Application Engine	
Run Status	Success			

ISIR Suspense With Details

Distribution Details

Distribution Node	local	**Expiration Date**	03/19/2026

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_244321153.log	166	02/17/2026 3:24:18.713209PM PST
CTC_FA_SUSPEND_ISIR_DETAIL-244321153.csv	434	02/17/2026 3:24:18.713209PM PST

Distribute To

Distribution ID Type	*Distribution ID
User	CTC_KFORSBERG

Return

Review Suspended ISIRs

After Running the CTC_FA_SUSPEND_ISIR_DETAIL ISIR Suspense Report in Schedule Queries and downloading to your computer, open the report.

Locate the Max Match column and sort to review the students with Max Match Level 10, 20, 30, 40, and 50.

I	J	K	N	O	Q	R
Last Name	First Name	SSN Match	Status	ID	Max Match Lev	Match Level
[redacted]	KERIE	SSN, Name, and DOB	Suspended	[redacted]	50	50 - SSN only
[redacted]	SHELLEY	SSN, Name, and DOB	Suspended	[redacted]	40	40 - SSN, DOB
[redacted]	SHELLEY	SSN, Name, and DOB	Suspended	[redacted]	40	40 - SSN, DOB

There are five Max Match Level reasons that can stop an ISIR from loading. They rank from 10-50. The greater the number, the more severe the suspend reason. The Match Level tells you on which value it did match. The A-E list below describes what values did not match.

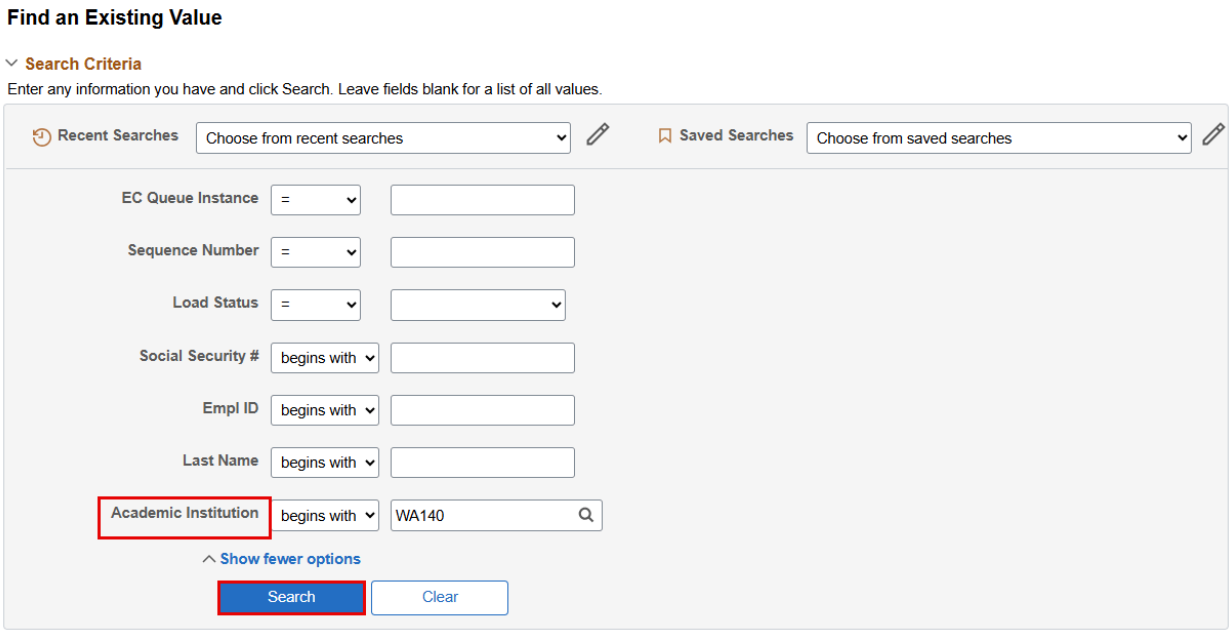
A. **10 - The student is a match but is suspending due to multiple students sharing the same information**
B. **20 - SSN mismatch.**
C. **30 - DOB mismatch.**
D. **40 - Last Name and First name mismatch.**
E. **50 - DOB, Last Name and First name mismatch.**

The Max Match Level reason can also be viewed by navigating to the 20xx-20xx ISIR Suspense Management page.

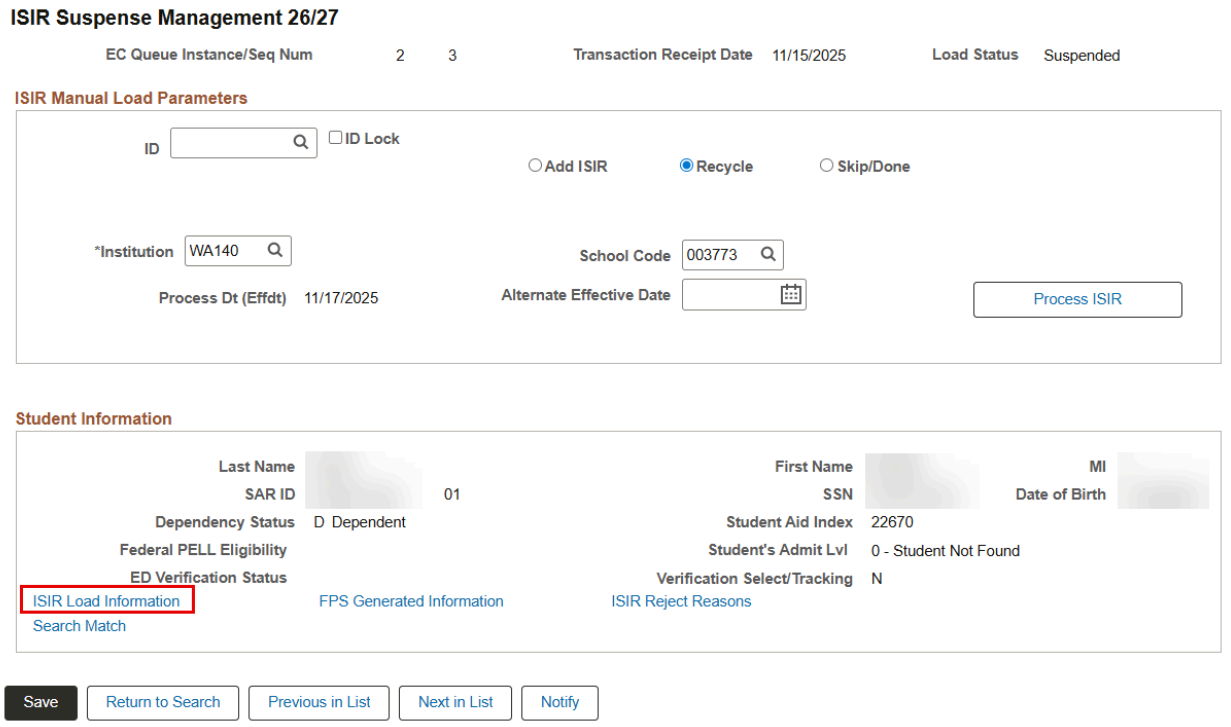
Review Suspended ISIRs Max Match Level

Navigation	Description
Financial Aid > File Management > ISIR Import > 20xx-20xx Suspense Management	Review all ISIR records processed by the FA Inbound and load processes.

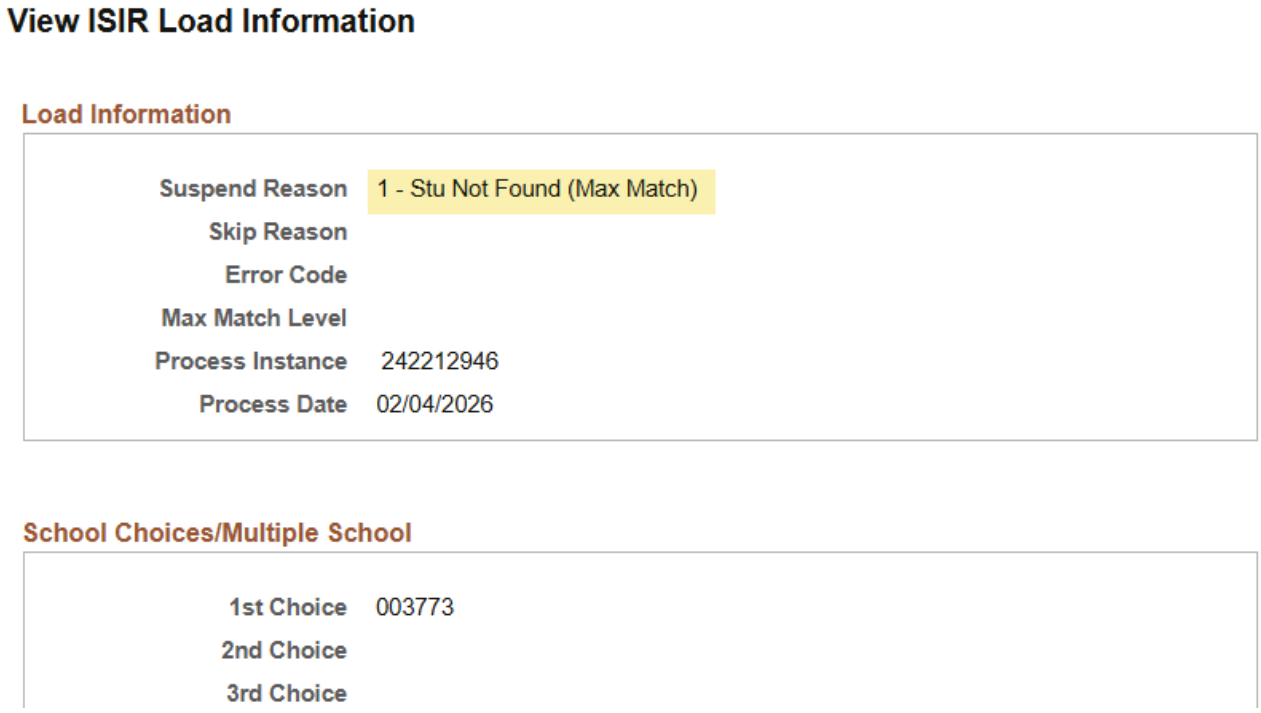
1. **Enter the student's Social Security Number, Empl ID or Last Name**
2. **Select Search**



When the ISIR Suspense Management page opens, ensure that the ISIR transaction number displayed is the appropriate transaction that needs to be reviewed.



The ISIR Load Information will display the Max Match Level as to why the student's ISIR is suspended.



Select Return. Work with your Records and Enrollment department to resolve the reason the student's ISIR is suspending. After resolution, the ISIR can be manually loaded or let the batch process load it.

To process a suspended ISIR please reference the following QRGs:

Understanding ISIR Search Match
Manually Loading ISIRs

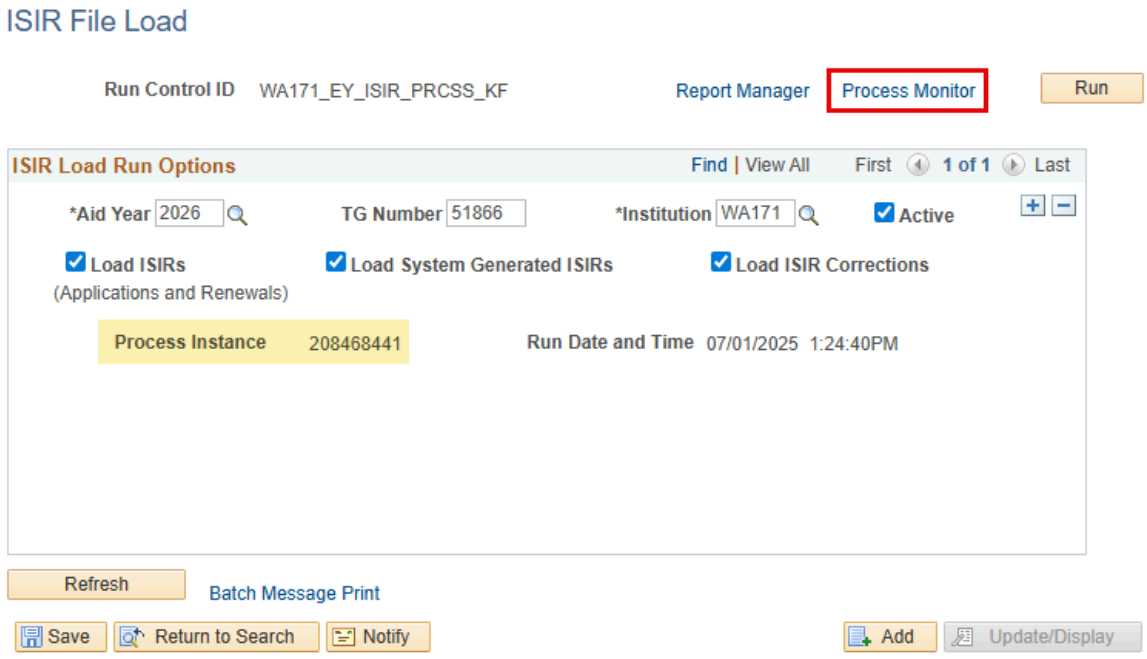
ISIR Transaction Source Process

Navigation	Description
Financial Aid > File Management > ISIR Import > Process ISIRs	Identifying EC QUEUE Instance number

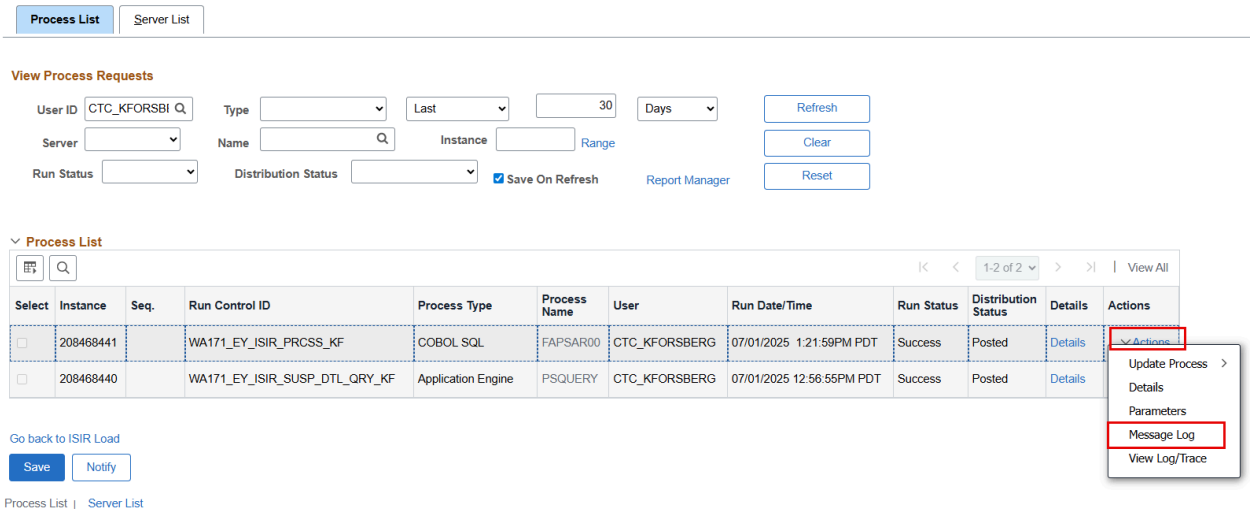
The ISIR Transaction Source query is designed to assist users with identifying the source by which the ISIR transaction has been generated. In addition, it identifies ISIR Load, Receipt and Process date.

Identify EC QUEUE INSTANCE number from Process ISIRs (FAPSAR00) process.

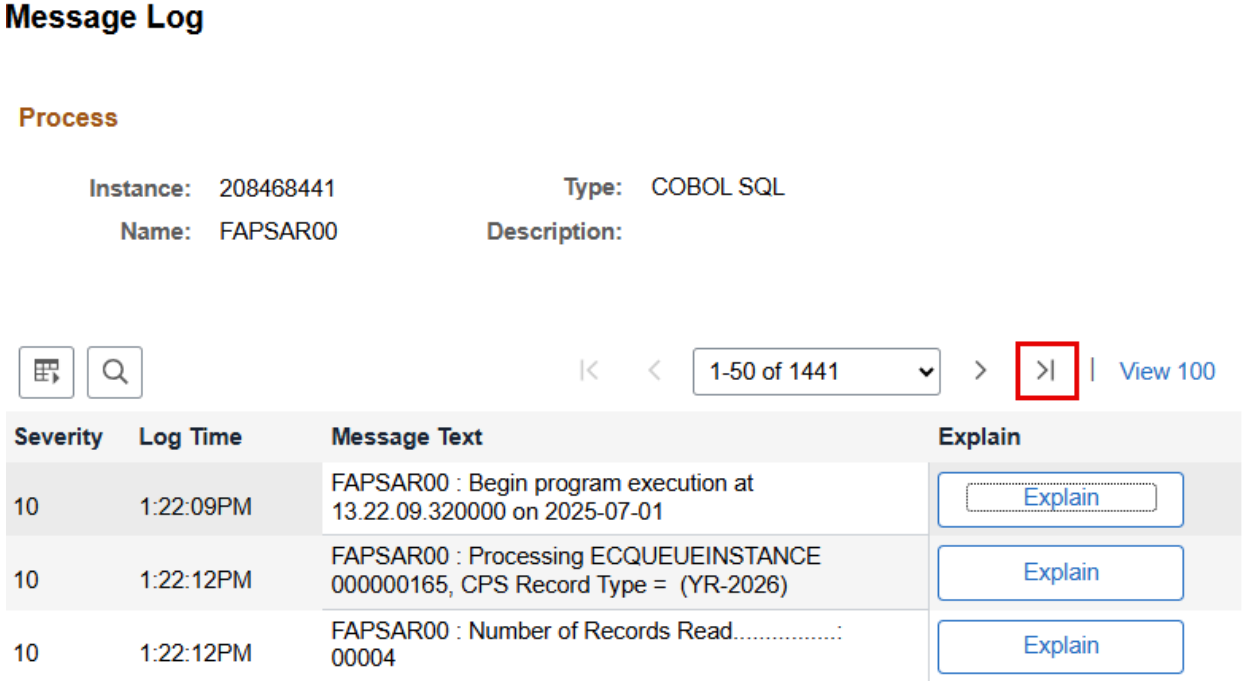
The EC Queue Instance Number is viewable on both the ISIR File Load page, and the Process Monitor List page after the FAPSAR00 process is complete.



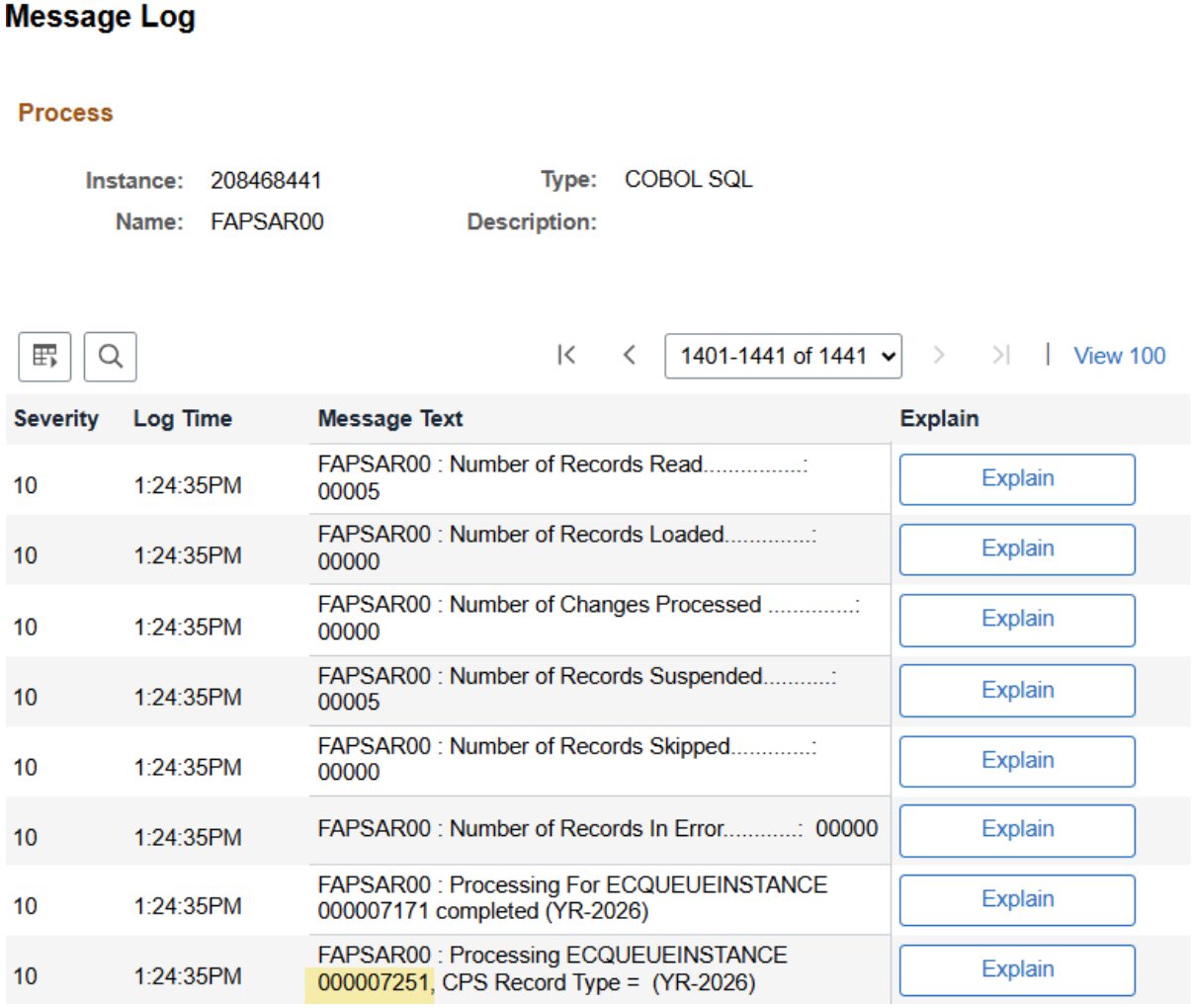
From the Process Detail page Actions link and select the Message Log option



From the Message Log select the Last link to be taken to the last page of processing



Scroll to the bottom of the page and locate the last ECQUEUEINSTANCE



Message Log

Process

Instance: 208468441 Type: COBOL SQL

Name: FAPSAR00 Description:

1401-1441 of 1441 View 100

Severity	Log Time	Message Text	Explain
10	1:24:35PM	FAPSAR00 : Number of Records Read.....: 00005	Explain
10	1:24:35PM	FAPSAR00 : Number of Records Loaded.....: 00000	Explain
10	1:24:35PM	FAPSAR00 : Number of Changes Processed .....: 00000	Explain
10	1:24:35PM	FAPSAR00 : Number of Records Suspended.....: 00005	Explain
10	1:24:35PM	FAPSAR00 : Number of Records Skipped.....: 00000	Explain
10	1:24:35PM	FAPSAR00 : Number of Records In Error.....: 00000	Explain
10	1:24:35PM	FAPSAR00 : Processing For ECQUEUEINSTANCE 000007171 completed (YR-2026)	Explain
10	1:24:35PM	FAPSAR00 : Processing ECQUEUEINSTANCE 000007251, CPS Record Type = (YR-2026)	Explain

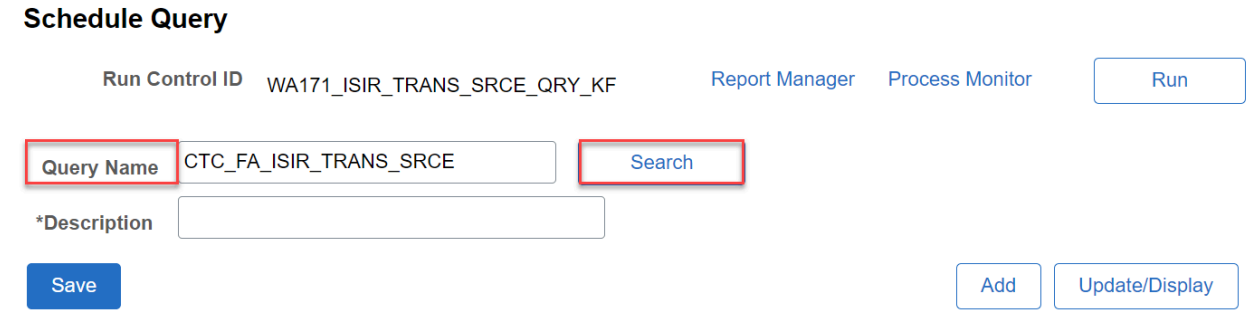
The highlighted EQQUEUEINSTANCE number will be used in subsequent processing.

Running the ISIR Transaction query

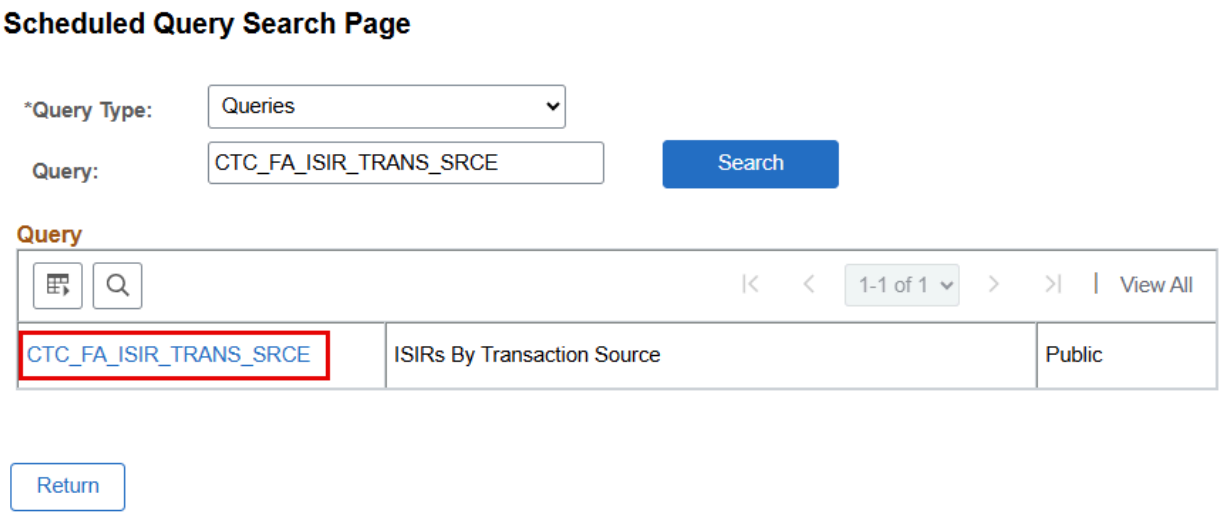
Navigation	Description
Reporting Tools > Query > Schedule Queries	Reviewing ISIR Transactions by source

Use a New or Existing Run Control ID

Enter query name and select Search - CTC_FA_ISIR_TRANS_SRCE

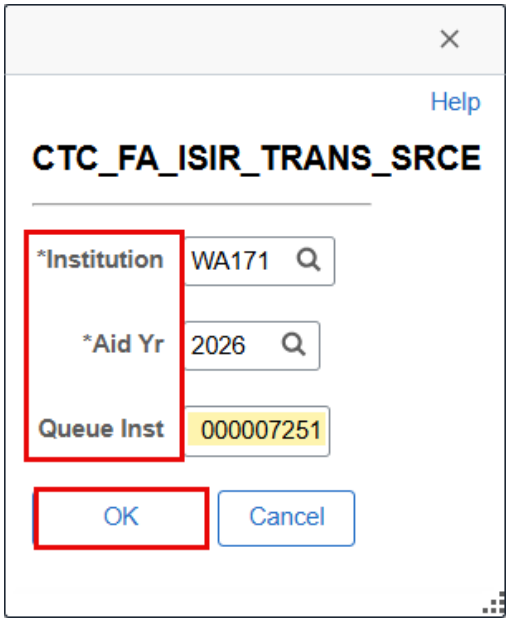


From the Scheduled Query Search Page select the Query name



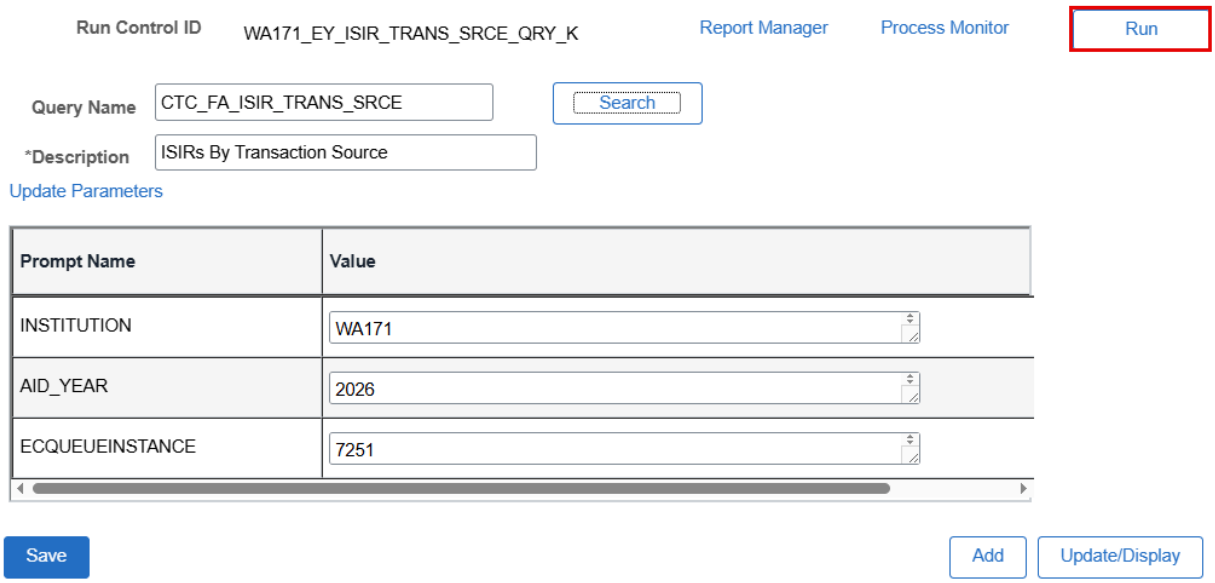
When the Edit Prompts open, enter the following information:

- **Institution**
- **Aid Year**
- **Queue Instance** (From earlier processing)
- **Select OK**



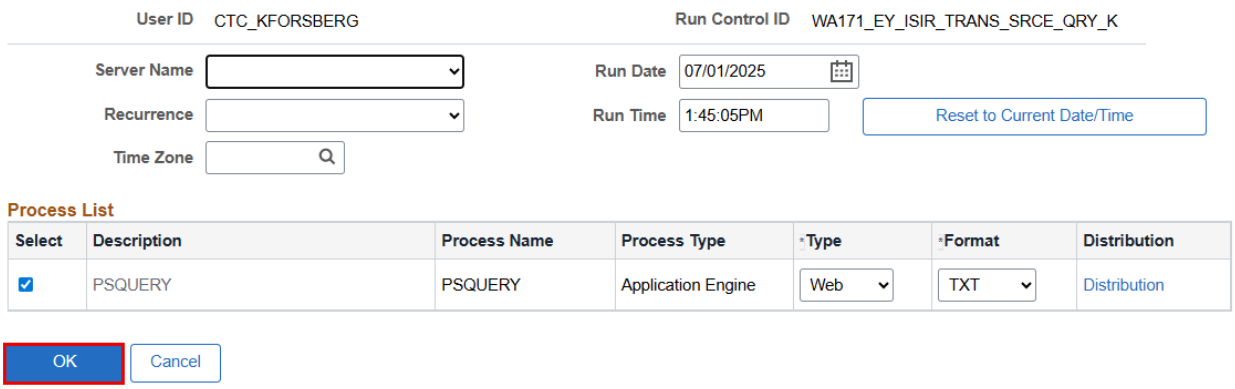
Ensure Parameters are correct when the Schedule Queries page opens

Select Run

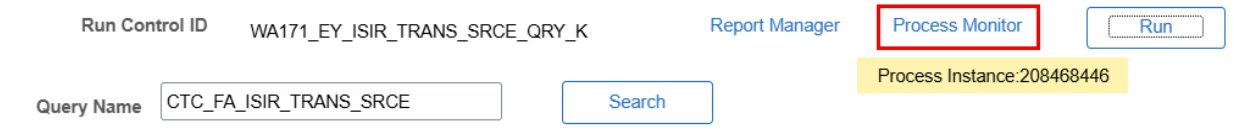


Select OK from the Process Scheduler Request page

Process Scheduler Request

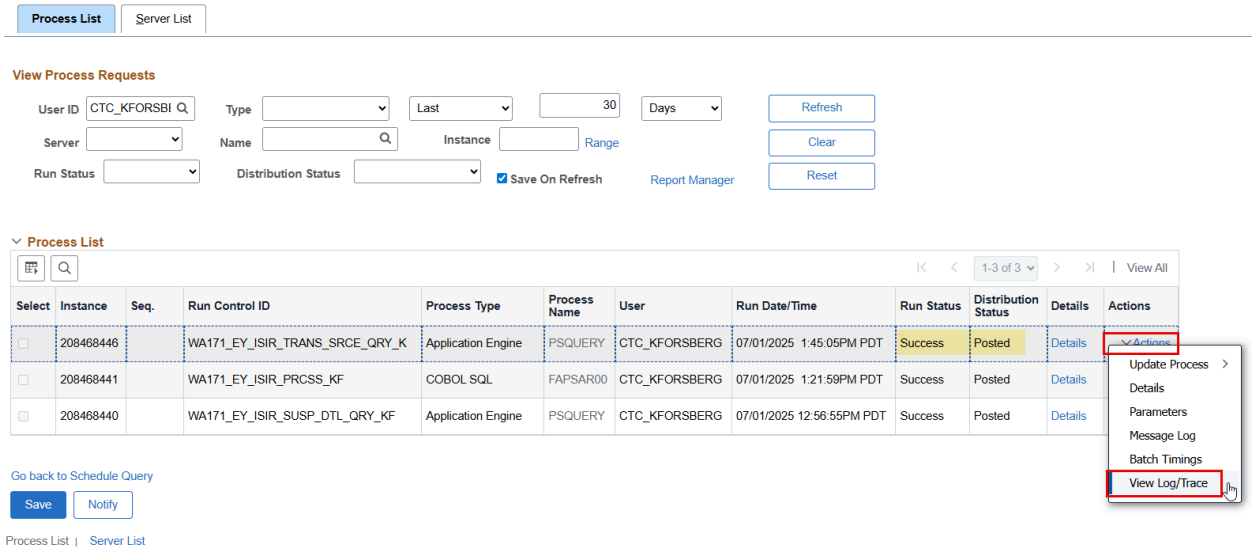


Select Process Monitor from the Schedule Queries page



Ensure process run to Success and Posted

Select the Actions link and then select the View Log/Trace option



Select the CTC_FA_ISIR_TRANS_SRCE_xxxxxx.csv link

View Log/Trace

Report

Report ID	19091134	Process Instance	208468446
Name	PSQUERY	Process Type	Application Engine
Run Status	Success		

Message Log

ISIRs By Transaction Source

Distribution Details

Distribution Node local

Expiration Date 07/31/2025

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_208468446.log	166	07/01/2025 1:47:52.428749PM PDT
CTC_FA_ISIR_TRANS_SRCE-208468446.csv	3,640	07/01/2025 1:47:52.428749PM PDT

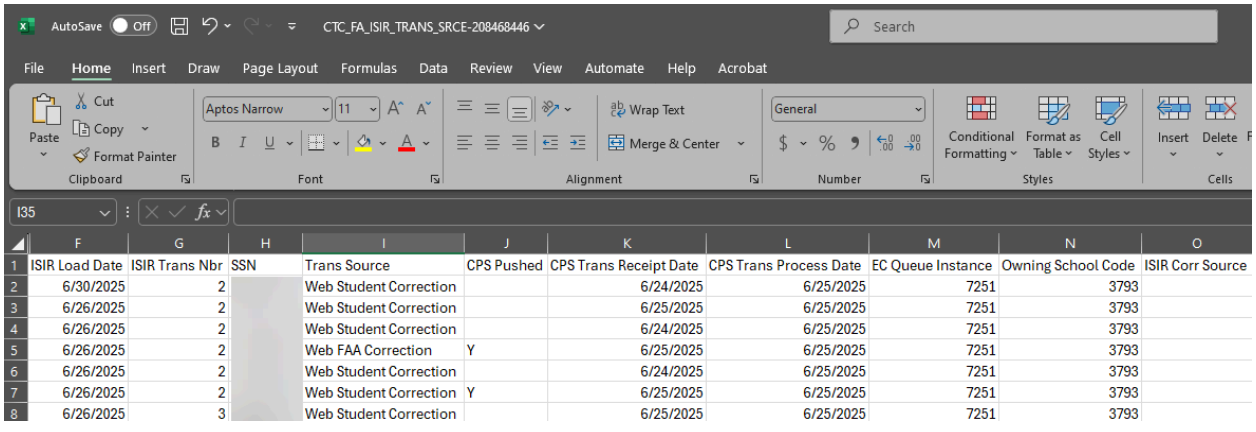
Distribute To

Distribution ID Type	*Distribution ID
User	CTC_KFORSBERG

Return

The file will open or will be downloaded depending on browser

Open to review student list



	F	G	H	I	J	K	L	M	N	O
1	ISIR Load Date	ISIR Trans Nbr	SSN	Trans Source	CPS Pushed	CPS Trans Receipt Date	CPS Trans Process Date	EC Queue Instance	Owning School Code	ISIR Corr Source
2	6/30/2025	2		Web Student Correction		6/24/2025	6/25/2025	7251	3793	
3	6/26/2025	2		Web Student Correction		6/25/2025	6/25/2025	7251	3793	
4	6/26/2025	2		Web Student Correction		6/24/2025	6/25/2025	7251	3793	
5	6/26/2025	2		Web FAA Correction	Y	6/25/2025	6/25/2025	7251	3793	
6	6/26/2025	2		Web Student Correction		6/24/2025	6/25/2025	7251	3793	
7	6/26/2025	2		Web Student Correction	Y	6/25/2025	6/25/2025	7251	3793	
8	6/26/2025	3		Web Student Correction		6/25/2025	6/25/2025	7251	3793	

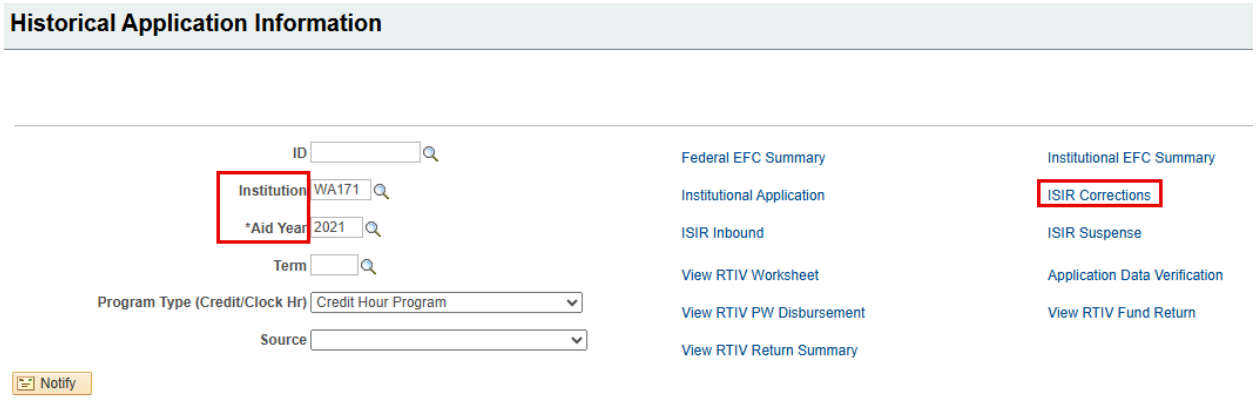
Viewing Archived ISIR Information

Navigation	Description
Financial Aid > Financial Aid History > View Archived Application Data	Reviewing archived ISIR information from prior aid year

Enter the following:

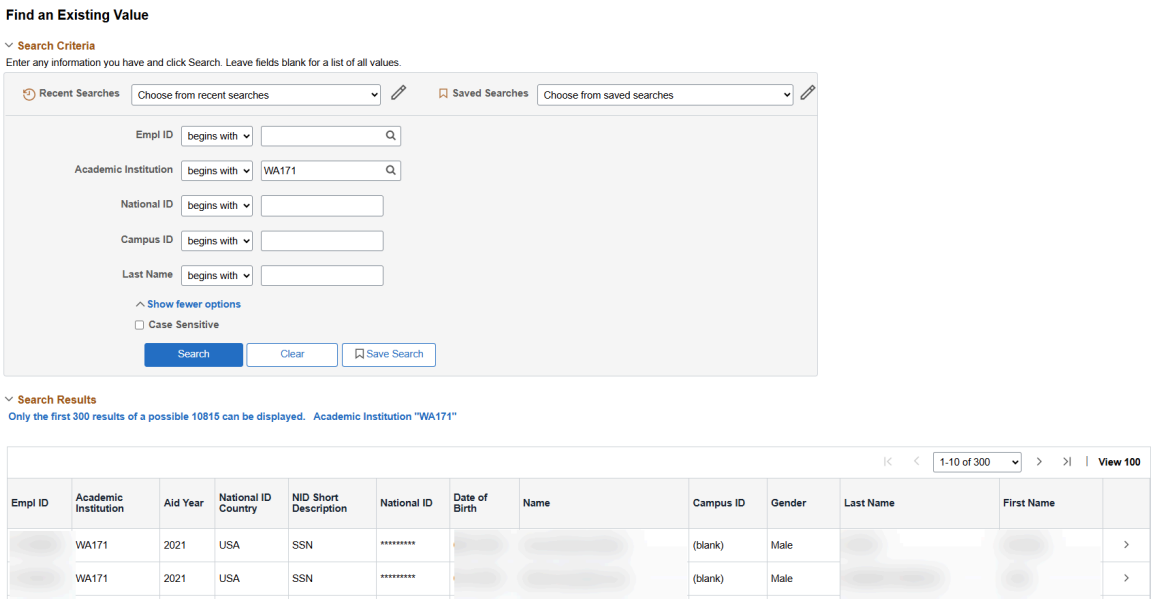
- **Institution**
- **Aid Year**

Select ISIR Correction



ISIR data for the prompted aid year is displayed in the ISIR Corrections page for that year.

Note: To view an individual student, enter the Empl ID prior to selecting ISIR Corrections. A new window will appear with the prompted Federal Application data page displayed.



Processing ATB

Navigation	Description
Financial Aid > Ability to Benefit > Create Ability to Benefit	**Use this page to create and maintain Ability to Benefit data in batch.**

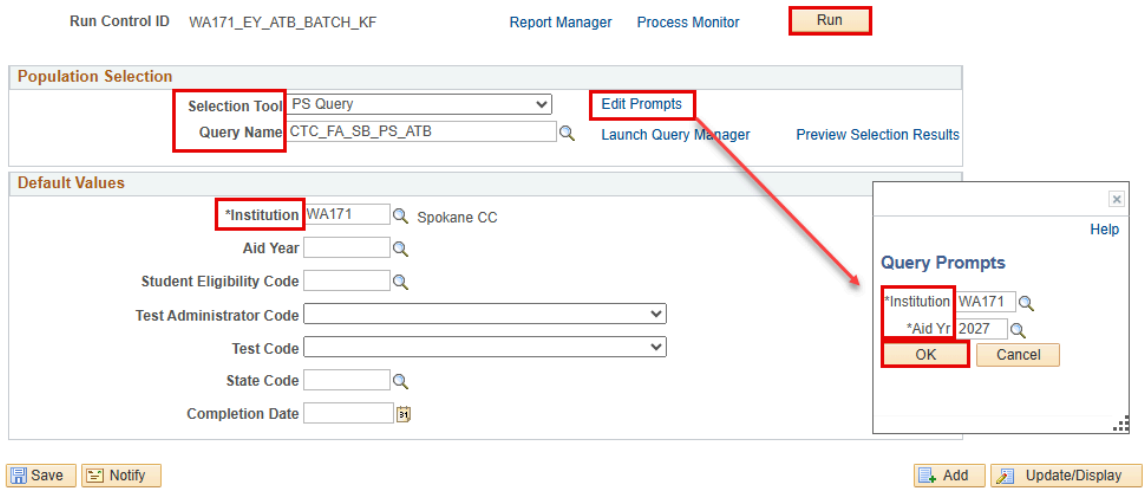
This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If you run ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Choose 'PS Query' from the Selection Tool**
3. **Choose CTC_FA_SB_PS_ATB for the Query Name**
4. **Select Edit Prompts**
5. **Enter Institution and Aid Year – Select OK**
6. **Select Preview Selection and note a student's ID from the preview list to review later**
7. **Enter Academic Institution**

Select Run and OK from the Process Monitor screen if processing immediately, *or*

Select Save, if a Run Control is being created to become part of a JobSet

Please Note – Aid year is not required under Default Values; leave blank



Update Aggregate Push

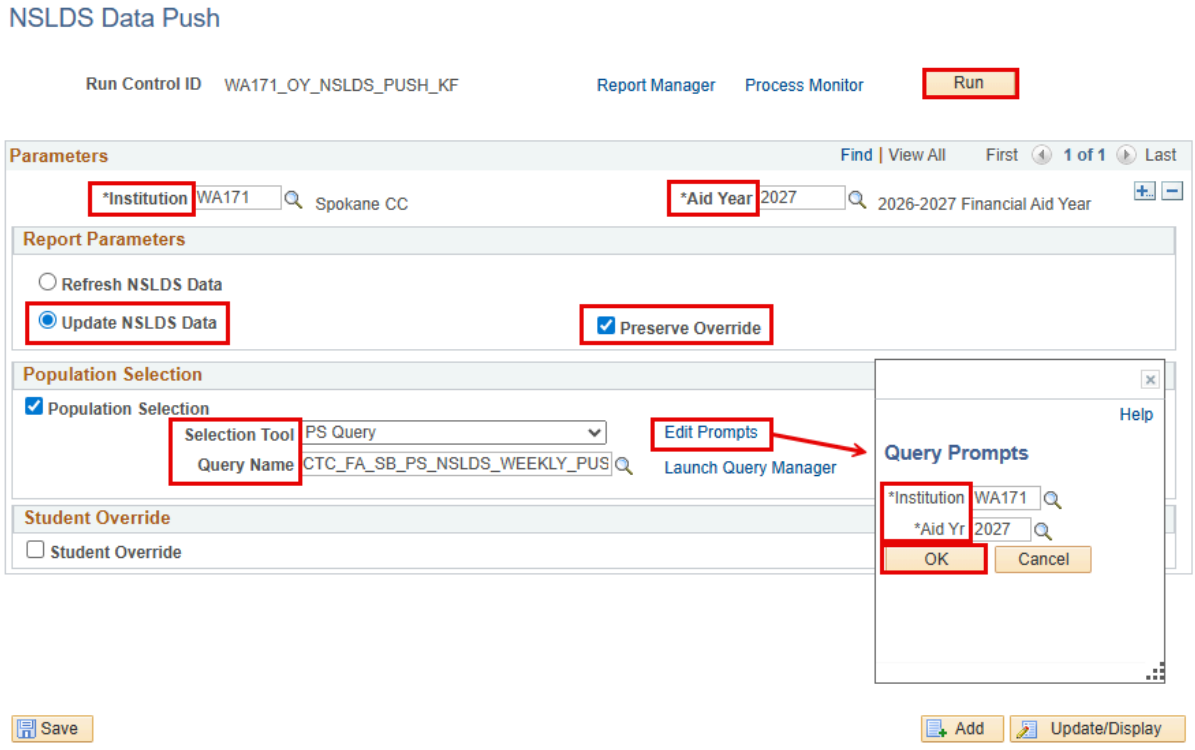
Navigation	Description
Financial Aid > File Management > NSLDS > Update Aggregates with NSLDS	Update NSLDS Aggregate tables with incoming data

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If running ad hoc, select the Run button.

Enter New or use existing Run Control ID

1. **Parameters**
   a. **Enter Institution and Aid Year**
2. **Report Parameters**
   a. **Select the "Update NSLDS Data" radio button**
   b. **Preserve Override – See Note**
3. **Population Selection**
   a. **Selection Tool = PS Query**
   b. **Query Name = CTC_FA_SB_PS_NSLDS_WEEKLY_PUSH**
4. **Select Edit Prompts and enter the following:**
   a. **Institution**
   b. **Aid Year**
5. **Select Run to run ad hoc or Save to add to a JobSet**

Preserve Override Check box: Update does not take place if the NSLDS Total amount has been overridden at the student level.

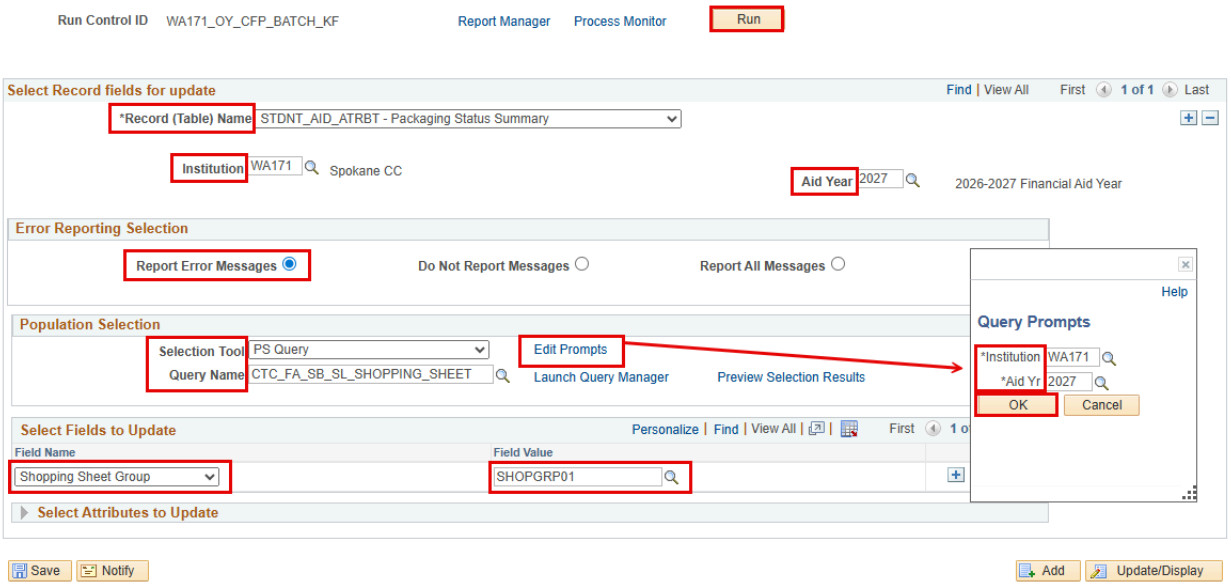


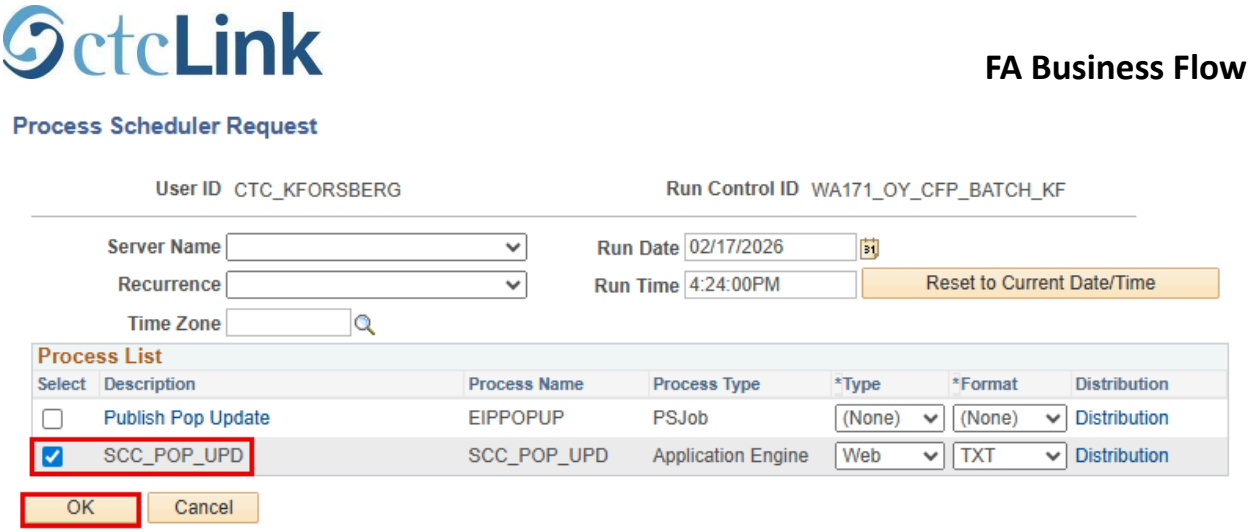
Assign College Financing Plan

Navigation	Description
Set Up SACR > System Administration > Utilities > Population Update > Population Update Process	Assign the College Financing Plan to a group of students. Query selects students with an award offer amount greater than zero

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Choose STDNT_AID_ATRBT – Packaging Status Summary from the Record (Table) Name from the dropdown menu**
3. **Select the Report Error Messages radio button**
4. **Choose PS Query from the Selection Tool dropdown menu**
5. **Use the lookup tool next to the Query Name field to choose CTC_FA_SB_SL_SHOPPING_SHEET**
6. **Select Edit Prompts and enter Institution and Aid Year**
7. **For Field Name select Shopping Sheet Group from the dropdown menu**
8. **For Field Value choose SHOPGRP01**
9. **Select Run (Select Save if adding to a JobSet)**
10. **Ensure process runs to "Success" and "Posted"**




Process Scheduler Request
User ID CTC_KFORSBERG
Run Control ID WA171_OY_CFP_BATCH_KF
Server Name
Recurrence
Time Zone
Run Date 02/17/2026
Run Time 4:24:00PM
Reset to Current Date/Time
Process List
Select
Description
Process Name
Process Type
*Type
*Format
Distribution
Publish Pop Update
EIPPOPUP
PSJob
(None)
(None)
Distribution
SCC_POP_UPD
SCC_POP_UPD
Application Engine
Web
TXT
Distribution
OK
Cancel

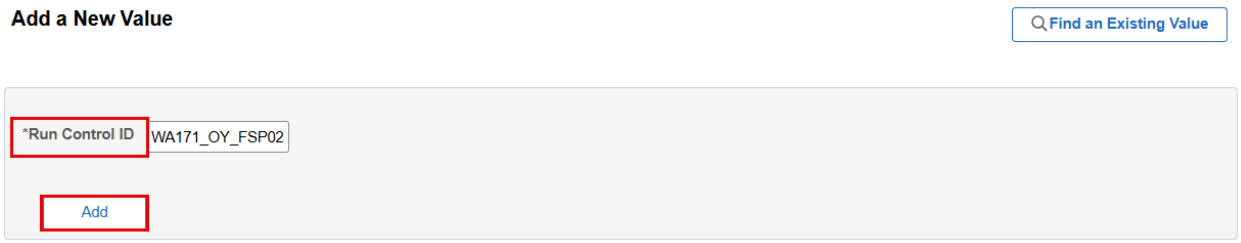
Managing Checklists

Creating and Running Checklist JobSet

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Define 3C engine events to set rules by which the system identifies the sets of checklists for the 3C engine to assign or update.

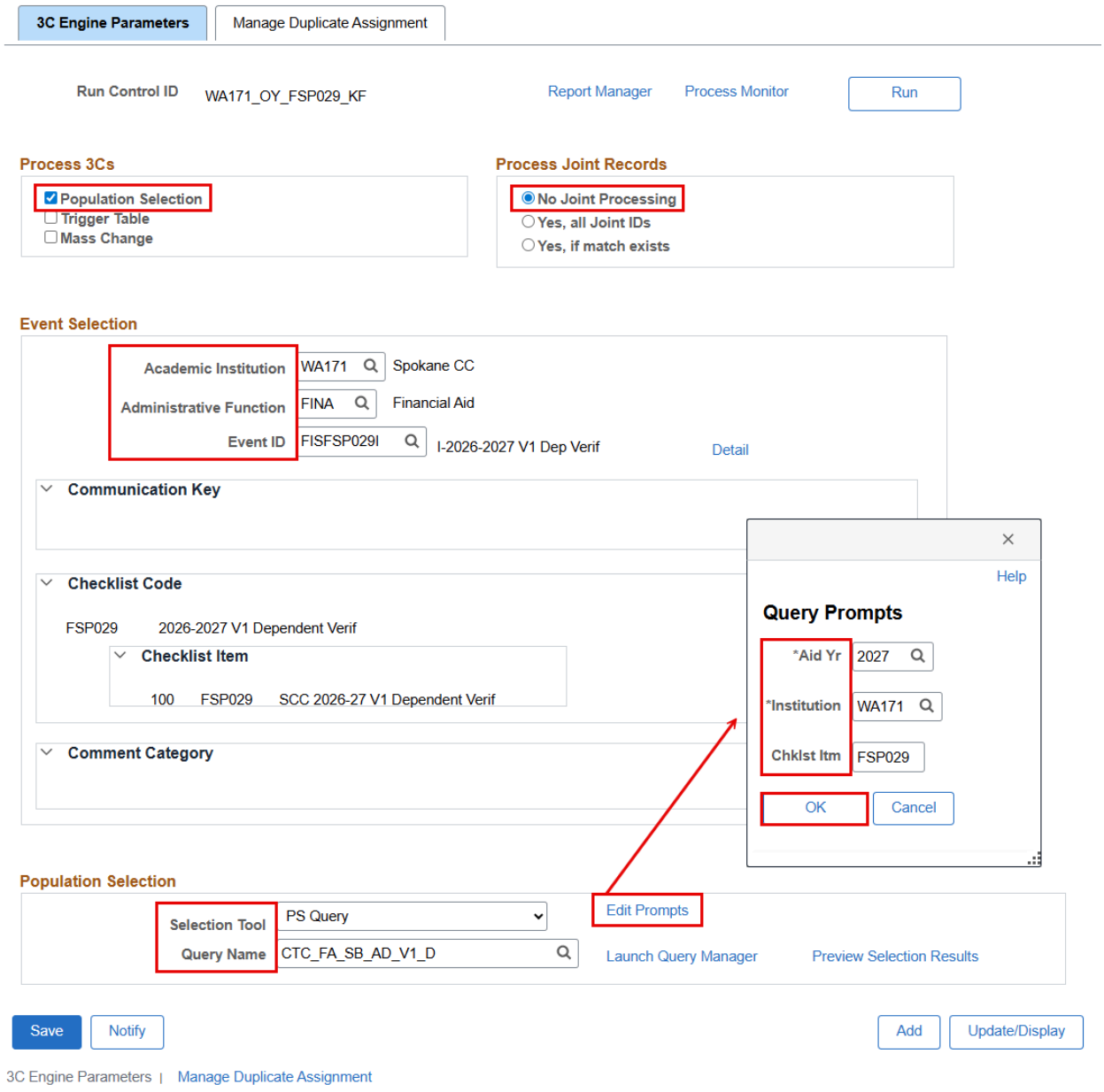
The JobSet provides the ability combine multiple processes into one job

1. **Select Add a New Value**
2. **Create a Run Control ID for the specific Checklist Item Type being set to run. Select Add (See Example Below)**



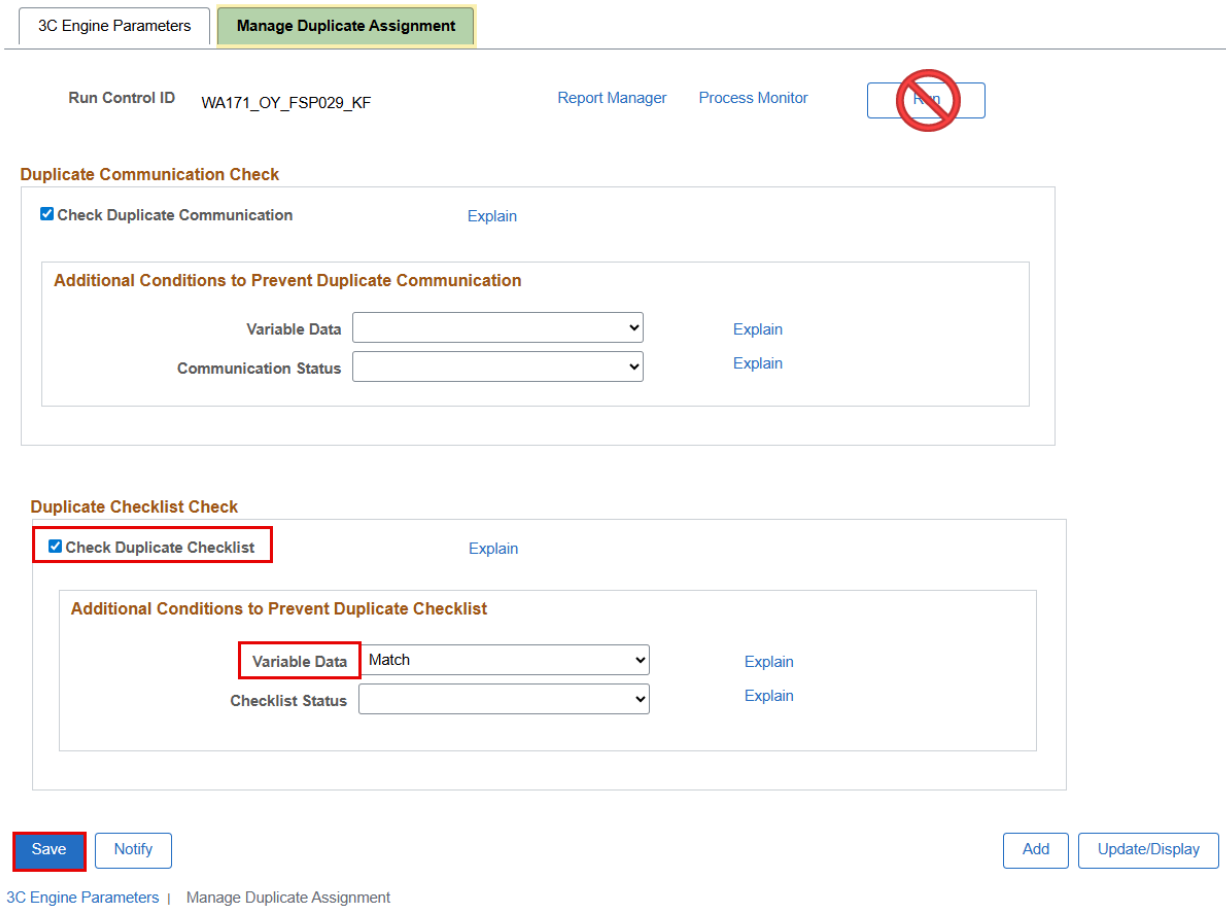
From the 3C Engine Parameters page:

1. **Select the Population Selection box**
2. **Under Event Selection enter:**
    a. **Academic Institution**
    b. **Administrative Function**
    c. **Event ID (*Note – Ensure the Event ID matches the Item Code designated in the Run Control ID)**
3. **Under Checklist Code, the desired Checklist Item Code and name will appear**
4. **Under Population Selection, select 'PS Query' from the dropdown menu**
5. **Use the look up tool next to Query Name to look up the correct query (*Note – The last 3 characters in the query name should match the last 3 characters of the Checklist Item Code)**
6. **Select Edit Prompts and enter the following information:**
    a. **Check List Item (*Note Ensure the Checklist Item Code entered corresponds with the Checklist Code used in the setup)**
    b. **Institution and Aid Year then select OK**



Select the Manage Duplicate Assignment tab

1. **Under the Duplicate Checklist Check section Check the 'Check Duplicate Checklist' checkbox**
2. **Select 'Match' from the Variable Data dropdown menu**
3. **Select Save (Do NOT select the RUN button)**



<u>Repeat the steps for the list of desired checklist assignment values for the institution</u> - (See Aid Year Rollover Checklist Document that comes in the AYRO Prep Session invite in or around October of each year)

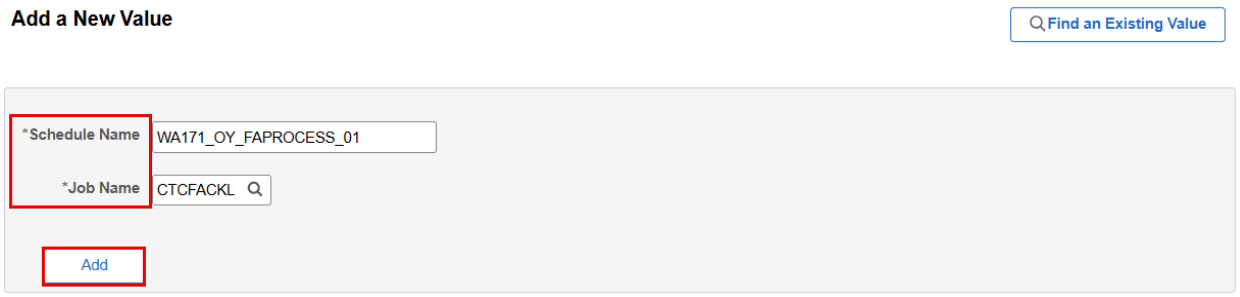
Schedule the JobSet

Navigation	Description
People Tools > Process Scheduler > Schedule JobSet Definitions	Run the Event Replay Schedule load job to set the process recurrence.

1. Select Add a New Value
2. Create the Schedule Name - Please adhere to the SBCTC JobSet Naming Convention

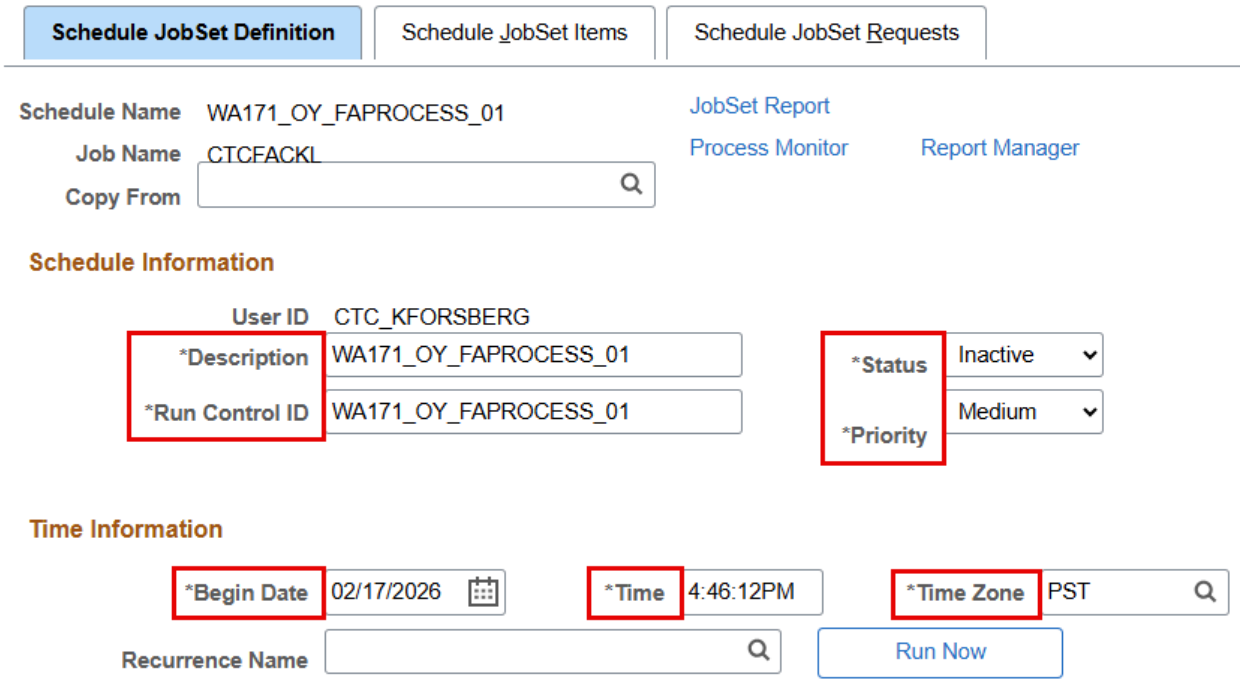
Institution	Even/Odd Year	Description	User
171	OY	FAProcess	#
172	OY	FAProcess	#
220	OY	FAProcess	#

3. Enter Job Name - CTCFACKL
4. Select Add



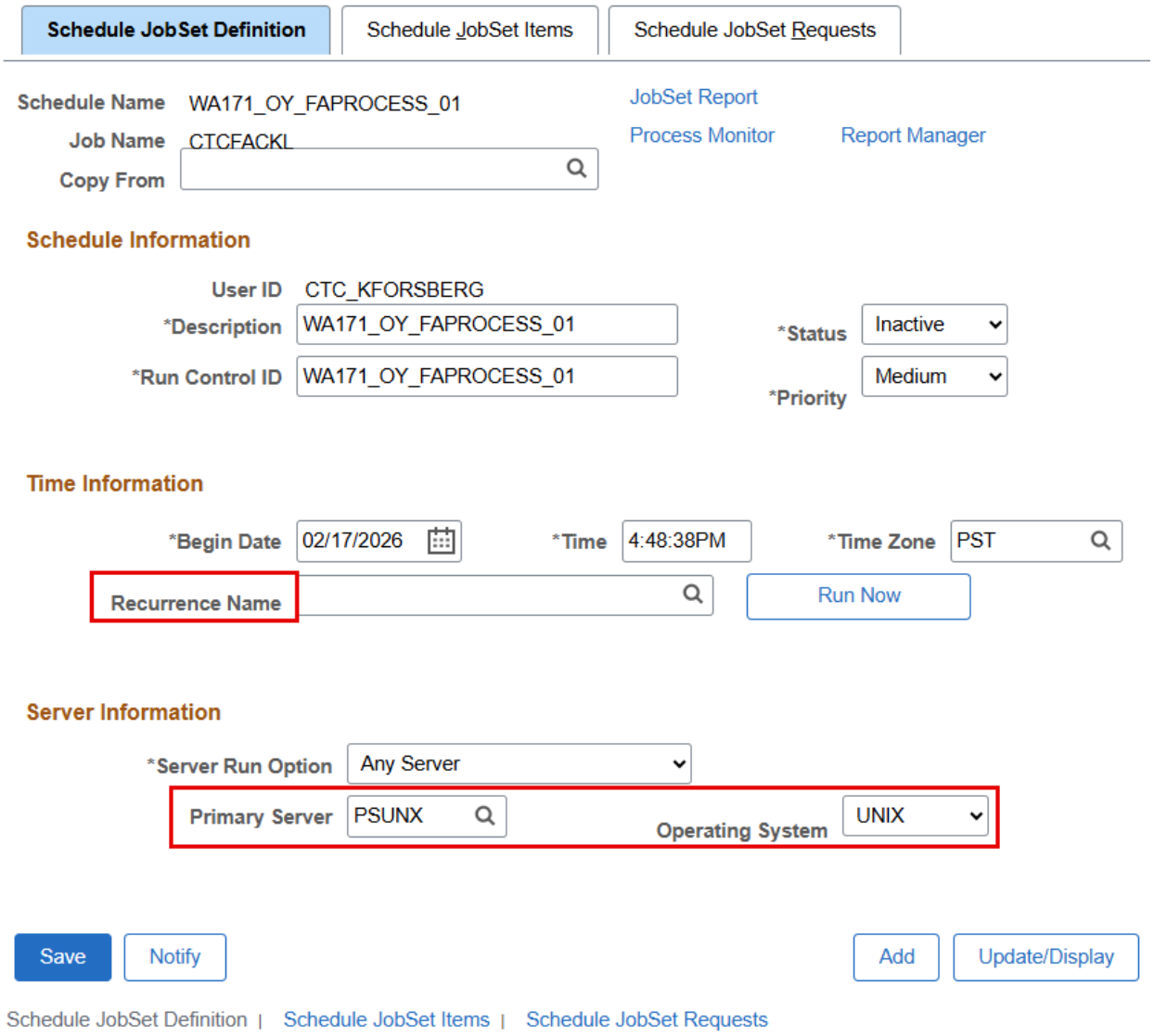
From the Schedule JobSet Definition tab

1. Enter the 'Institution Specific Description' into the Description field
2. Enter 'Institution Specific Information' into the Run Control ID field
3. Verify 'Status' field value = Inactive
4. Verify 'Priority' field vale = Medium
5. Verify Begin Date, Time and Time Zone reflects the current date and time



6. **Verify Recurrence Name field is blank**
7. **Select 'Primary Server' for the Server Run option**
8. **Enter the same server name used in the earlier step into the Primary Server field**

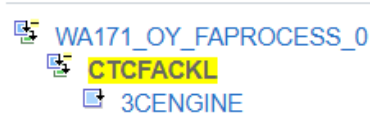
9. **Enter 'UNIX' for the Operating System**



Select the Schedule JobSet Items tab

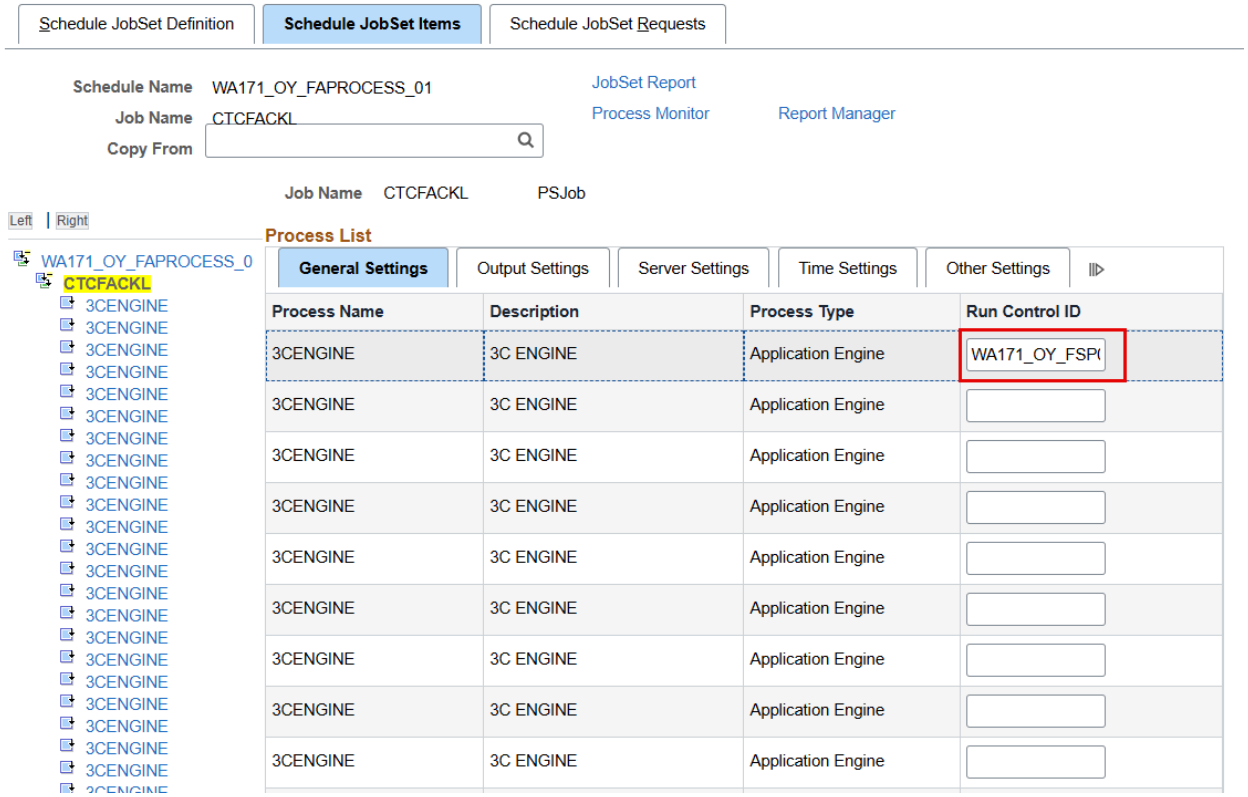
Select on the Process list drop down Icon to the left of the page next to the Job Name link

The 3C Engine Rows will display



The number of rows should be exactly the same number as the number of rows created in earlier steps.

Enter Run Control ID value in each row (*Note – Each row should have a different Run Control ID value)

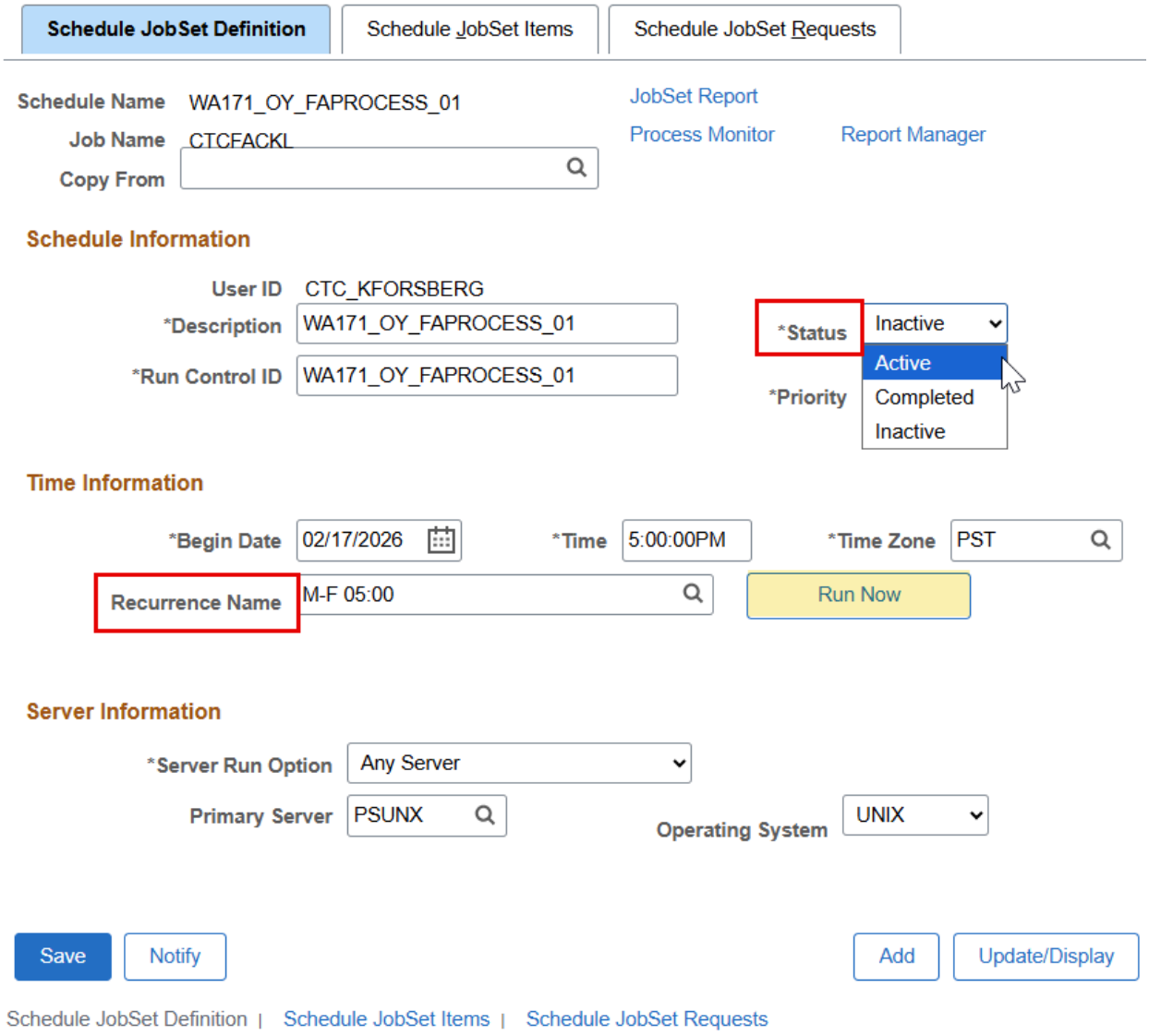


Select the Schedule JobSet Definition tab

Set the Status to <u>Active</u> if starting up in the JobSet. Check your college's assigned scheduled JobSet time and then define the recurrence.

Select the Save button if not starting the JobSet now. The Run Now button starts the JobSet process.

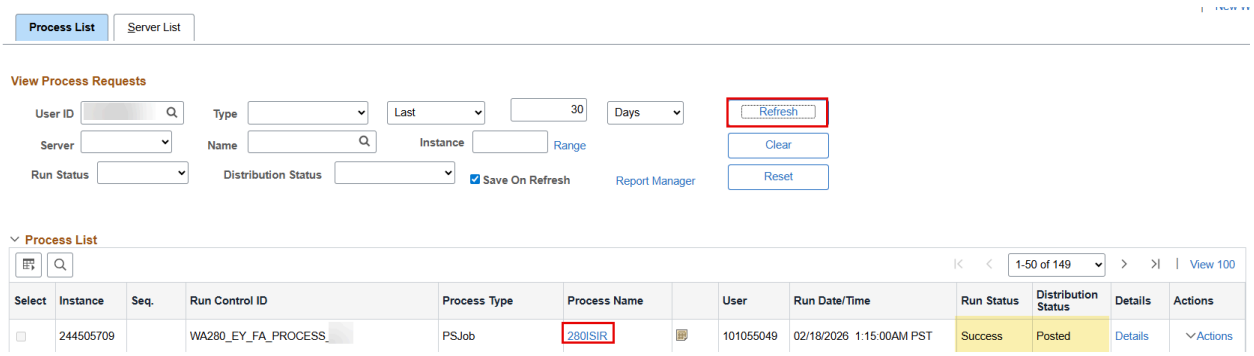
Note: If you select the Run Now button, no Process Instance Number will display on the screen. DO NOT select Run Now again.



Verify JobSet Scheduling

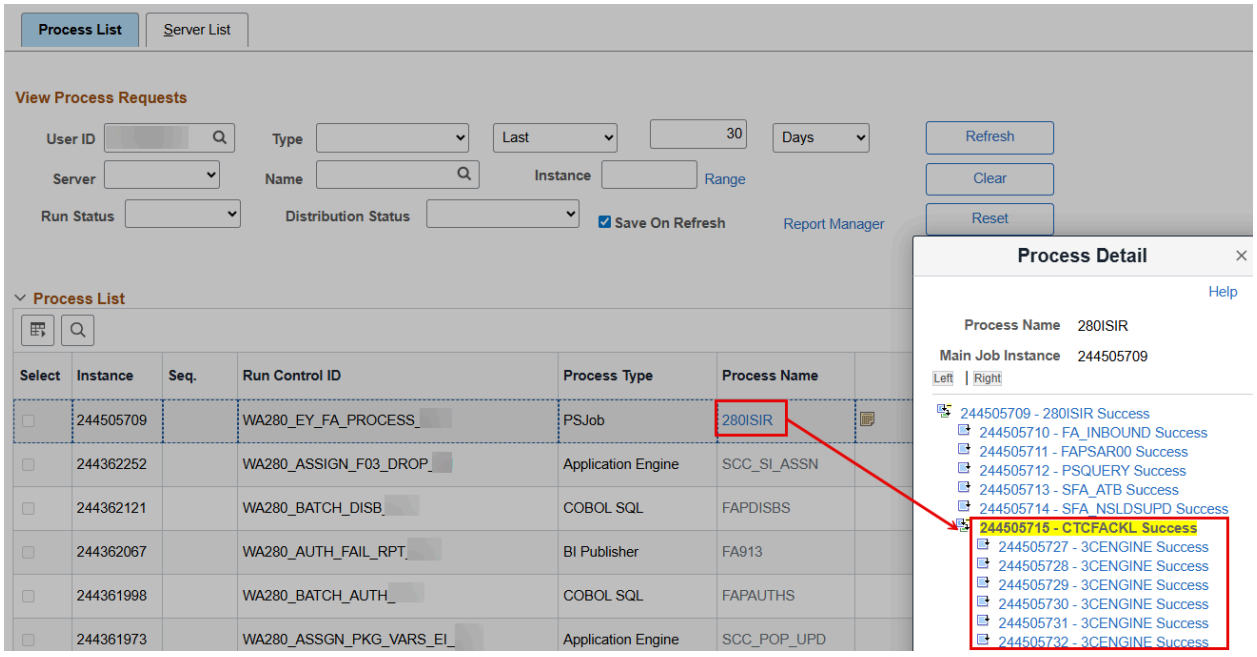
Navigation	Description
People Tools > Process Scheduler > Process Monitor	Process List page, where job status submitted process requests are viewable

1. Locate the ISIR JobSet Process Name and then find the Process Name used in the previous steps. For example, CTCFACKL was used as the Job Name in earlier steps.
2. You may select Refresh until the Run Status reads 'Success' and the Distribution Status reads 'Posted'



By selecting the "Process Name" link the Process Detail page will open

Select the Job Instance links to view processing details



Initial Request Notification

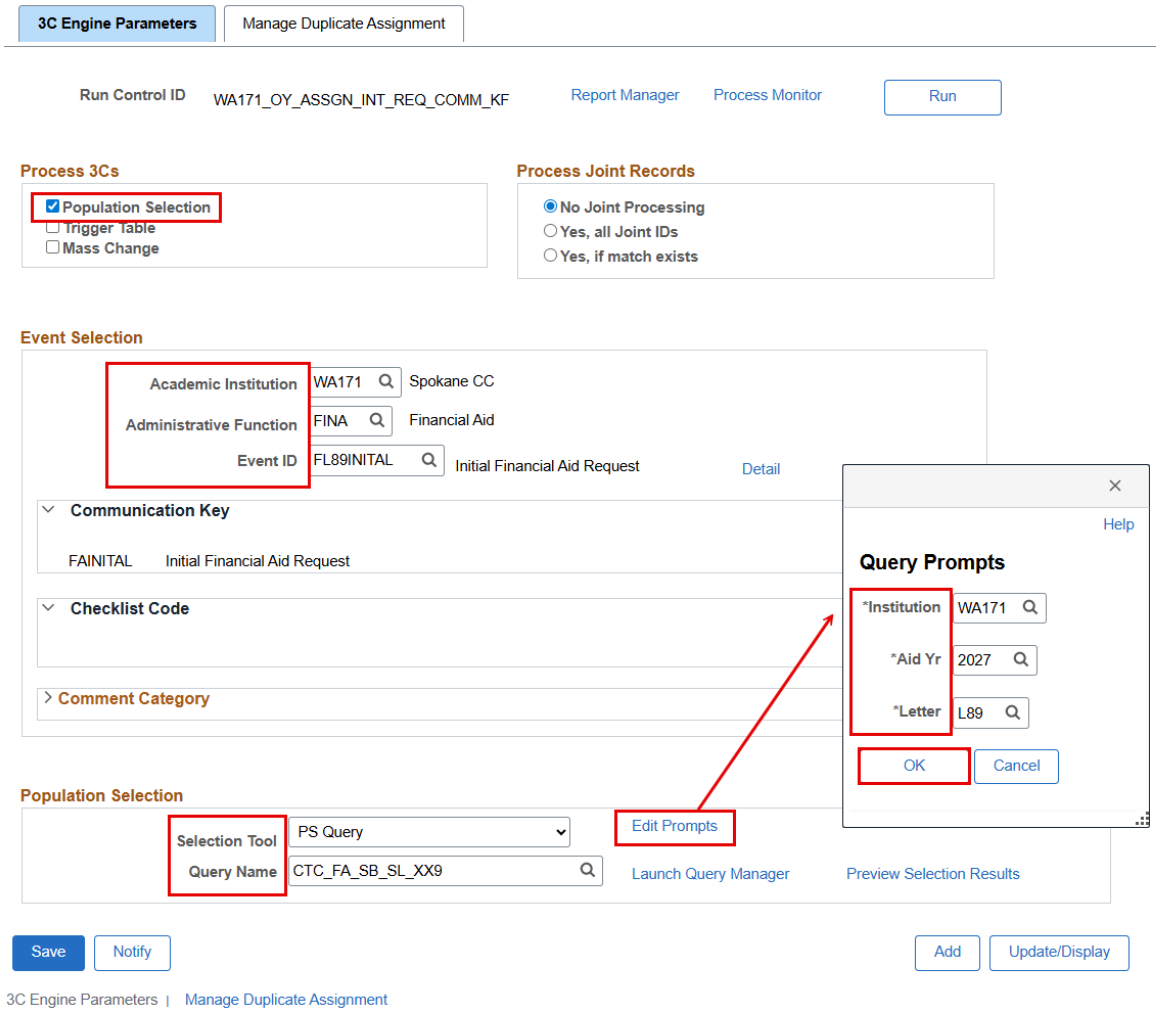
Assigning Initial Request Communication

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Assigning Initial Request for FA Application Materials Communications

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and select the Save button. If running ad hoc, select the Run button.

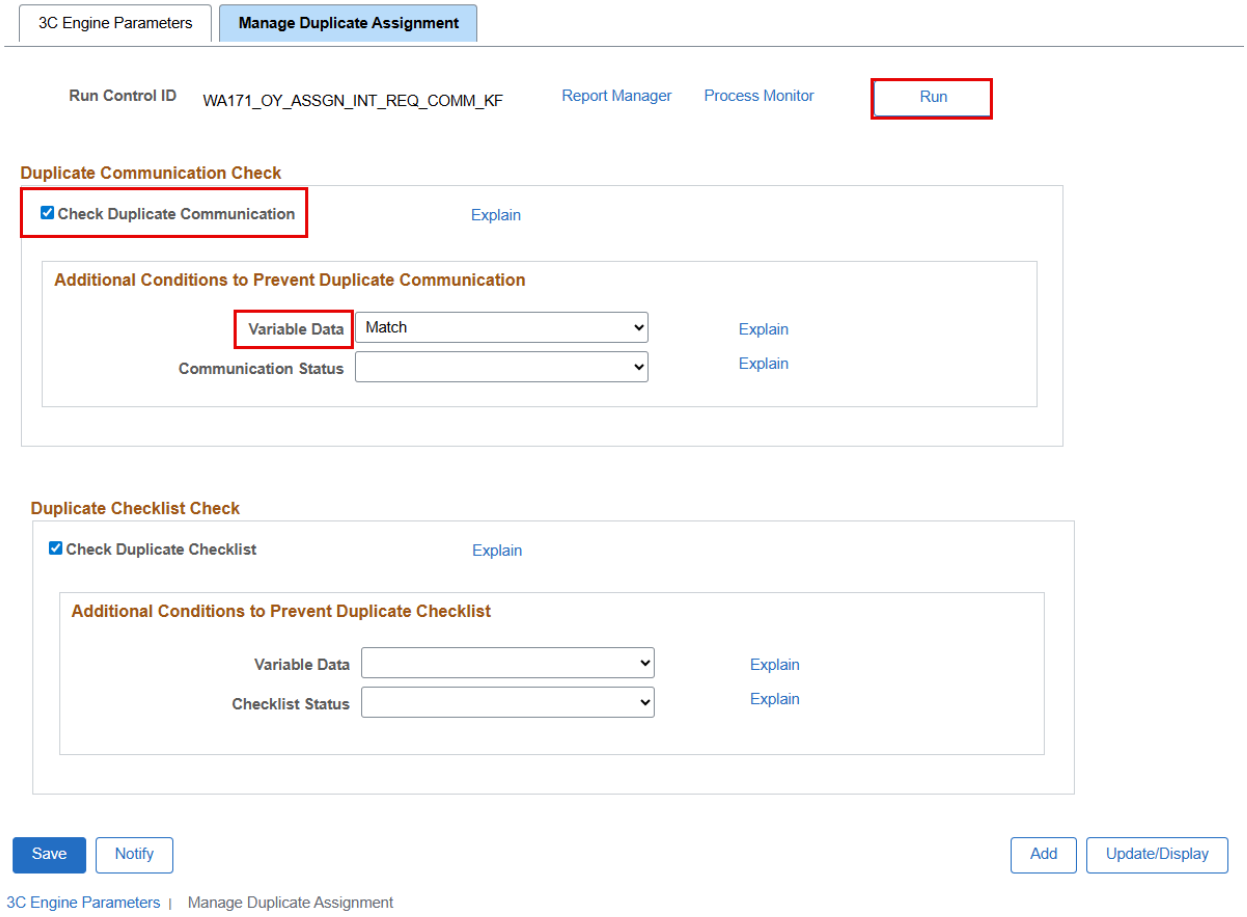
3C Engine Parameters

1. **Enter New or use existing Run Control ID**
2. **Select Population Selection**
3. **Enter Academic Institution**
4. **Administrative Function = FINA**
5. **Function Event ID = Initial Financial Aid Request (Code varies between institutions)**
6. **Selection Tool = PS Query**
7. **Query Name = Use the lookup tool to choose CTC_FA_SB_SL_XX9**
8. **Select Edit Prompts – Enter the following:**
    a. **Institution**
    b. **Aid Year**
    c. **Letter - Make sure the letter code matches the letter code in the Event ID**
9. ***Optional* – You may select Preview Selection Results to see to whom this communication will be assigned**

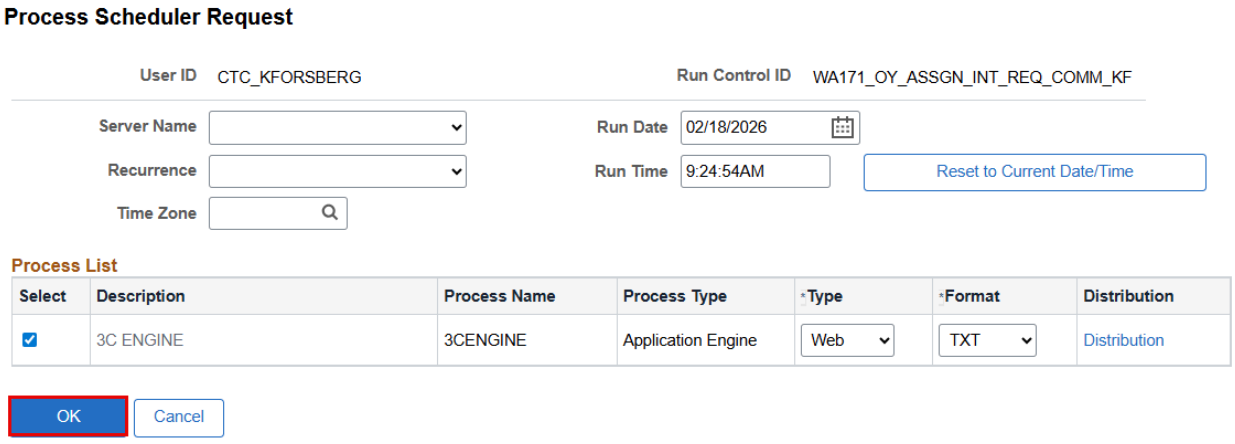


✔ **Select Manage Duplicate Assignment tab**

10. **Under Duplicate Communication Check use the dropdown menu next to 'Variable Data' and choose Match**
11. **Select Run**



12. From the Process Scheduler Request page select the 3C Engine box and select OK



13. Ensure Process Monitor reads Success and Posted

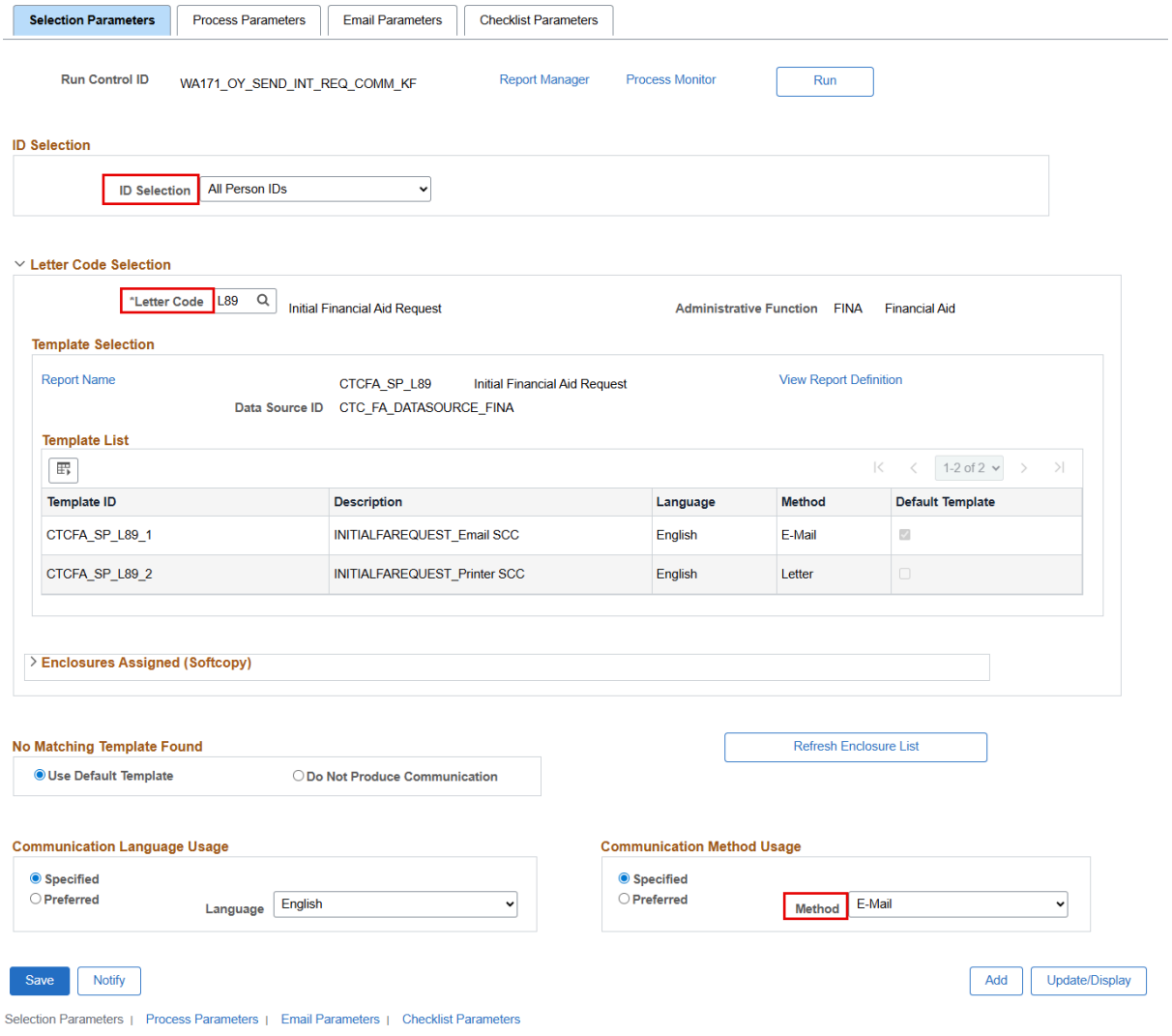
Sending Initial Request Communication

Navigation	Description
Campus Community > Communications > Communication Generation	Sending Initial Request Communications for FA Application Materials to students

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

Selection Parameters

1. **Enter New or use existing Run Control ID**
2. **ID Selection = All Person IDs (Do not select *All IDs*, select *ALL Person IDs*).**
3. **Letter Code = Choose the letter code from the previous steps**
4. **Communication Method Usage – Method = E-Mail**



Process Parameters

Person Communication Usage Section:

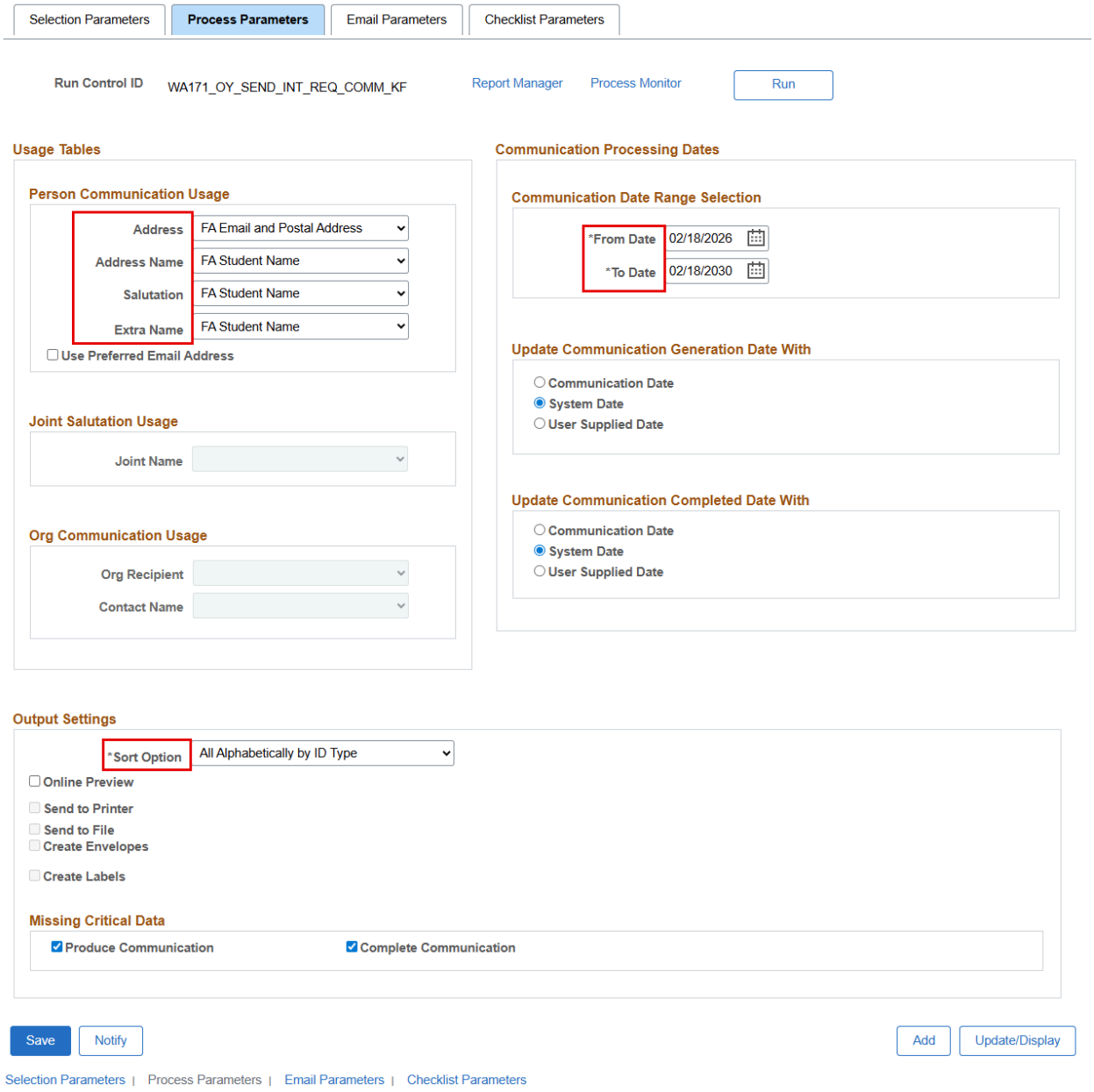
1. **Address = FA Email and Postal Address**
2. **Address Name = FA Student Name**
3. **Salutation = FA Student Name**
4. **Extra Name = FA Student Name**

Communication Date Range Selection

5. **From Date – Select desired date**
6. **To Date – Select a future date**

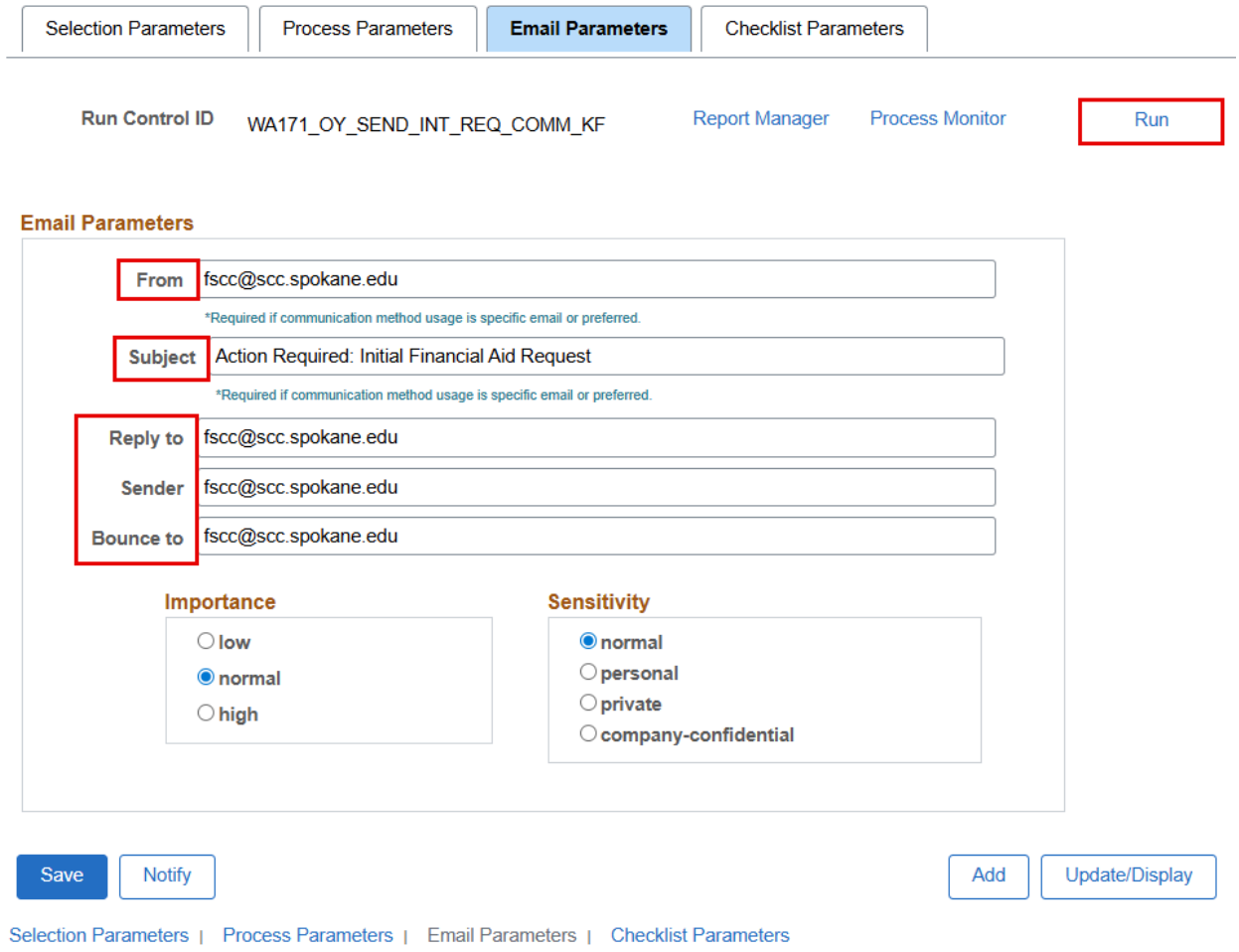
Output Settings

7. **Sort Option – All Alphabetically by ID Type**

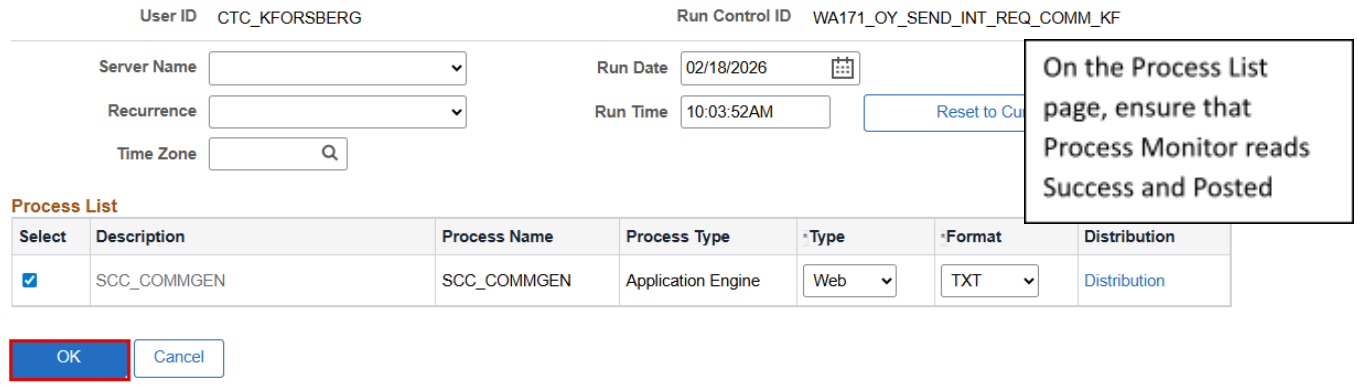


Email Parameters

1. From = Enter the desired email addressed used by the institution
2. Subject = Enter a subject line for the email communication
3. Reply to = Enter the desired email addressed used by the institution
4. Sender = Enter the desired email addressed used by the institution
5. Bounce to = Enter the desired email address used by the institution
6. Select Run



Choose SCC_COMMGEN from the Process Scheduler Request – Select OK



Second Request Notifications

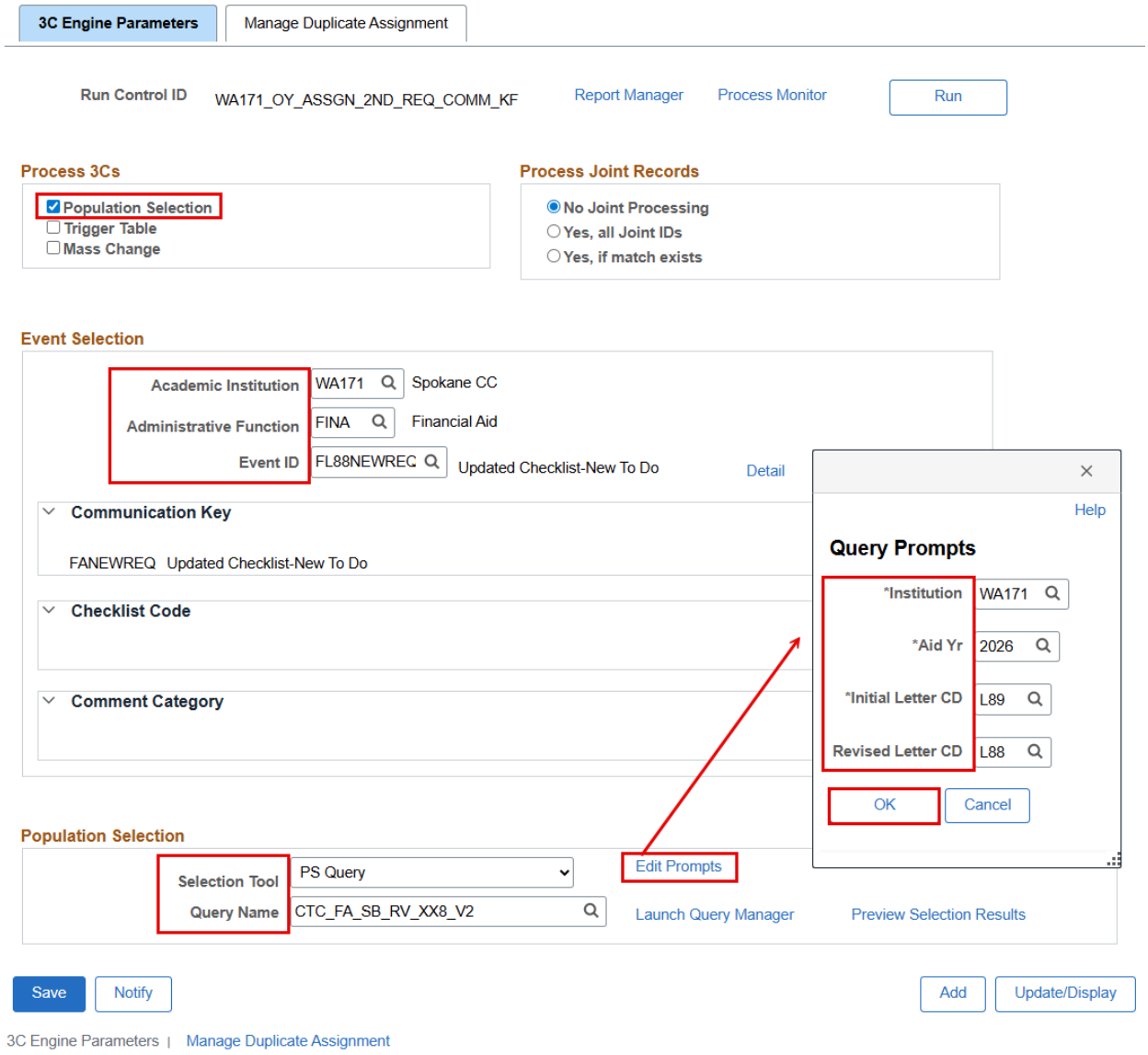
Assigning Second Request Communication – New Checklist Items

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Assigning Second Request Communications when new checklist has been assigned

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

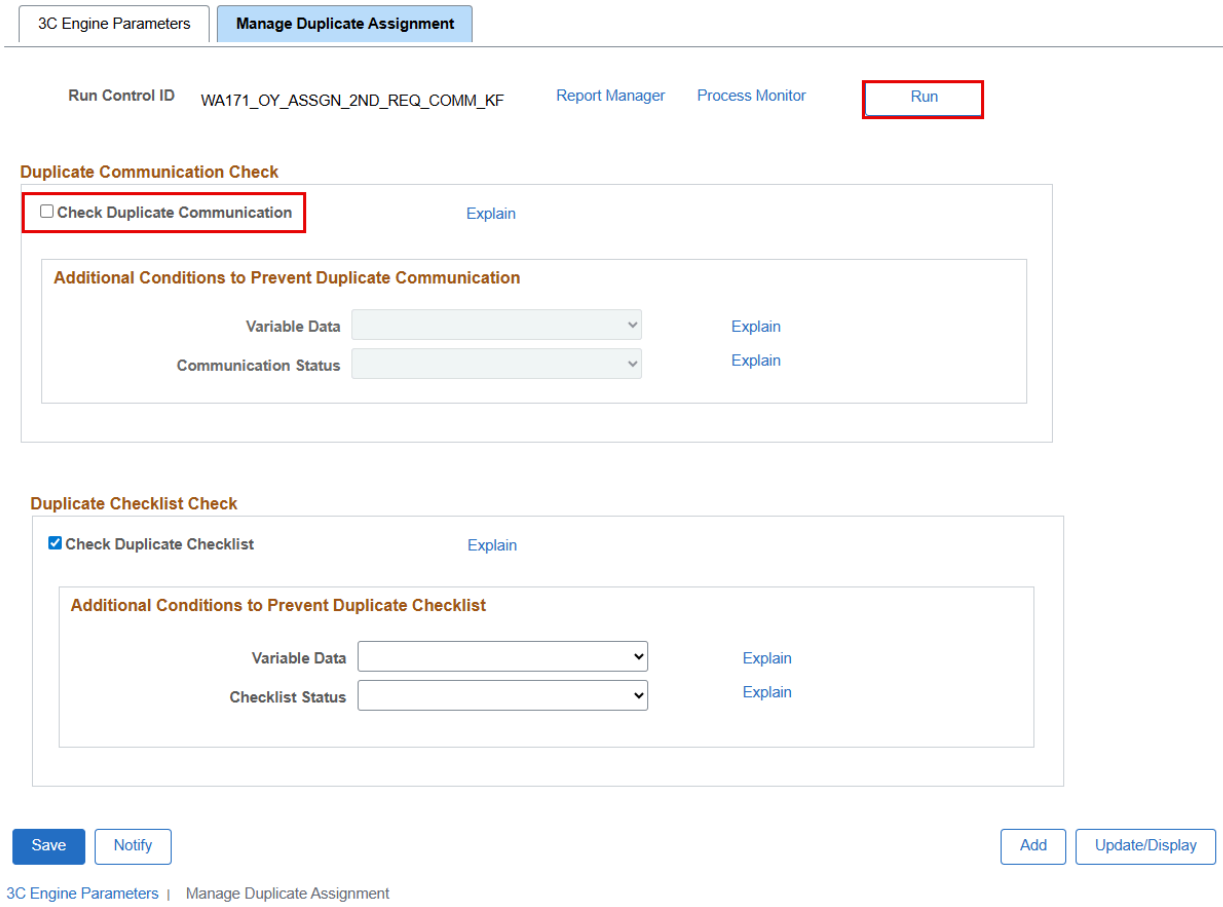
3C Engine Parameters

1. **Enter New or use existing Run Control ID**
2. **Select Population Selection**
3. **Enter Academic Institution**
4. **Administrative Function = FINA**
5. **Function Event ID = Updated Checklist-New To Do (Code varies between institutions)**
6. **Selection Tool = PS Query**
7. **Query Name = Use the lookup tool to choose CTC_FA_SB_RV_XX8_V2**
8. **Select Edit Prompts – Enter the following:**
    a. **Institution**
    b. **Aid Year**
    c. **Initial Letter CD**
    d. **Revised Letter CD**
9. **Select Preview Selection Results**
10. **Select Manage Duplicate Assignment tab**



Manage Duplicate Assignment

11. **Select Manage Duplicate Assignment tab**
12. **Ensure the "Check Duplicate Communication" checkbox is *Unchecked* and the Variable Data field is set to blank. This will allow the communication to be assigned each time a new checklist item is added.**
13. **Select Run**


3C Engine Parameters
Manage Duplicate Assignment
Run Control ID
WA171_OY_ASSGN_2ND_REQ_COMM_KF
Report Manager
Process Monitor
Run
Duplicate Communication Check
Check Duplicate Communication
Explain
Additional Conditions to Prevent Duplicate Communication
Variable Data
Explain
Communication Status
Explain
Duplicate Checklist Check
Check Duplicate Checklist
Explain
Additional Conditions to Prevent Duplicate Checklist
Variable Data
Explain
Checklist Status
Explain
Save
Notify
Add
Update/Display
3C Engine Parameters | Manage Duplicate Assignment

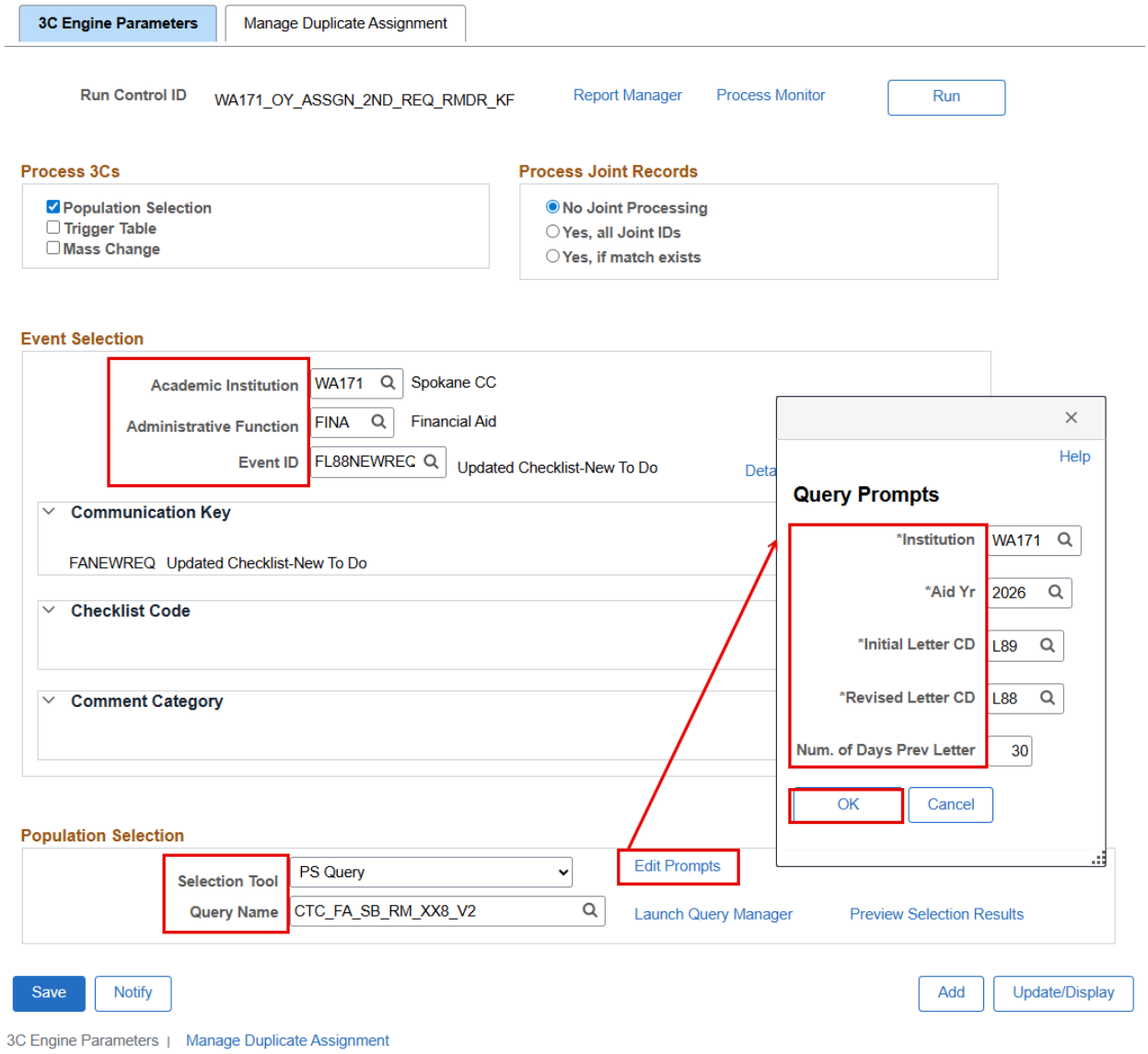
Assigning Second Request Communication – Reminder

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Assign Second Request Communication when checklist items have remained in initiated status

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will select the Save button. If running ad hoc, select the Run button.

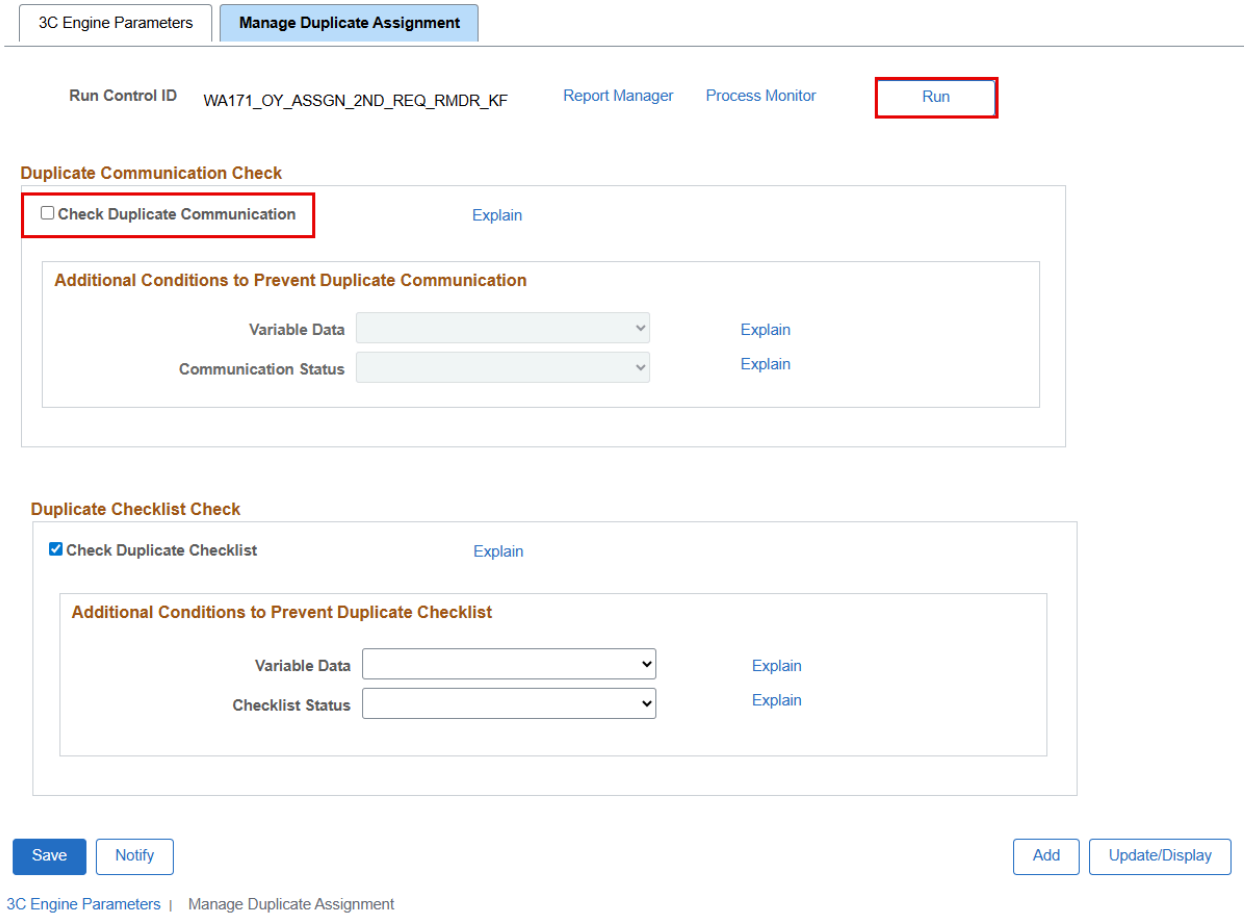
3C Engine Parameters

1. **Enter New or use existing Run Control ID**
2. **Select Population Selection**
3. **Enter Academic Institution**
4. **Administrative Function = FINA**
5. **Function Event ID = Updated Checklist-New To Do (Code varies between institutions)**
6. **Selection Tool = PS Query**
7. **Query Name = Use the lookup tool to choose CTC_FA_SB_RM_XX8_V2**
8. **Select Edit Prompts – Enter the following:**
    a. **Institution**
    b. **Aid Year**
    c. **Initial Letter CD**
    d. **Revised Letter CD**
    e. **Num. of Days Prev Letter - (Colleges' discretion)**
9. **Select Preview Selection Results**
10. **Select Manage Duplicate Assignment tab**



Manage Duplicate Assignment

1. **Select Manage Duplicate Assignment tab**
2. **Ensure the "Check Duplicate Communication" is Unchecked and the Variable Data field is set to blank. (If there is a possibility that the student may receive this communication more than once)**
3. **Select Run**



Use the steps from the "Sending Initial Request Communication" to use Communication Generation for sending out the assigned Second Request Notifications

Please Note – Ensure the selected letter codes for the Communication Generation process reflect the ones assigned for Second Request Notifications

Update FA Progress Units for ABE/AESL

This process is used to update FA Progress Units to zero on the student enrollment page. This process is done for the term for ABE/AESL classes (indicated by CIP code starting with '32').

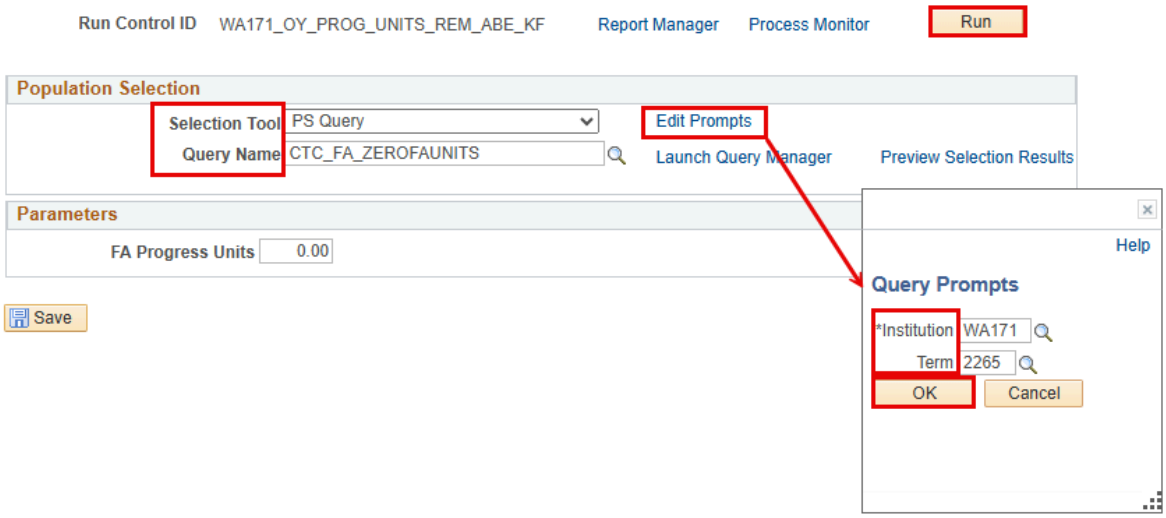
Navigation	Description
Financial Aid > Financial Aid Term > Update FA Progress Units	Updating FA Progress Units

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

Enter New or Existing Run Control ID

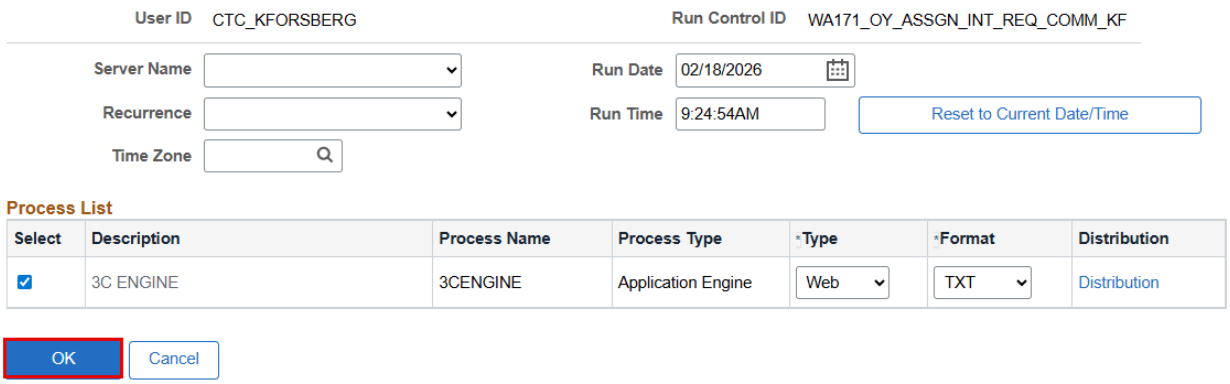
From the Update FA Progress Units page enter the following information:

- **Selection Tool: PS Query**
- **Query Name: CTC_FA_ZEROFAUNITS**
- **Enter Edit Prompts**
  - **Institution**
  - **Term – This Edit Prompt value will need to be updated at the start of each term**
- **Select Preview Selection Results to ensure students are being selected.**
- **FA Progress Units = 0.00**
- **Select the RUN button (If adding to a jobset, choose Save.)**



From the Process Scheduler Request page select OK

Process Scheduler Request



Ensure process runs to Success and Posted

Update FA Progress Units for Enrollment Level Hold

The FA Progress Units/Enrollment Level Hold process helps to stop disbursements on partially withdrawn students. It uses the Update FA Progress Units process to populate FA Progress Units to zero on students' enrollment page when they have withdrawn from a course. The FA term is then updated which will alter the Calculated FA Load value to reflect the correct enrollment load. The Enrollment Level Hold/Service Indicator Process is then run to compare the value on the packaging variables page to the Calculated FA Load Value. The FLF service indicator is then assigned to stop disbursements from occurring until aid is adjusted to reflect load values and packaging variable status matches the Calculated FA Load.

Order of Operations:

1. **FA Progress Units Update**
2. **Build FA Term (Calculated FA Load Value Updated)**
3. **Enrollment Level Hold/Service Indicator Process (run before disbursements see pg. 78)**
4.

Updating FA Progress Units

This process is used to update FA Progress Units on the student enrollment page to zero. This process is run for students who have dropped and have received a "W" grade for the term or for students who receive a grade that indicates non completion of a course (i.e: F, 0.0, Z).

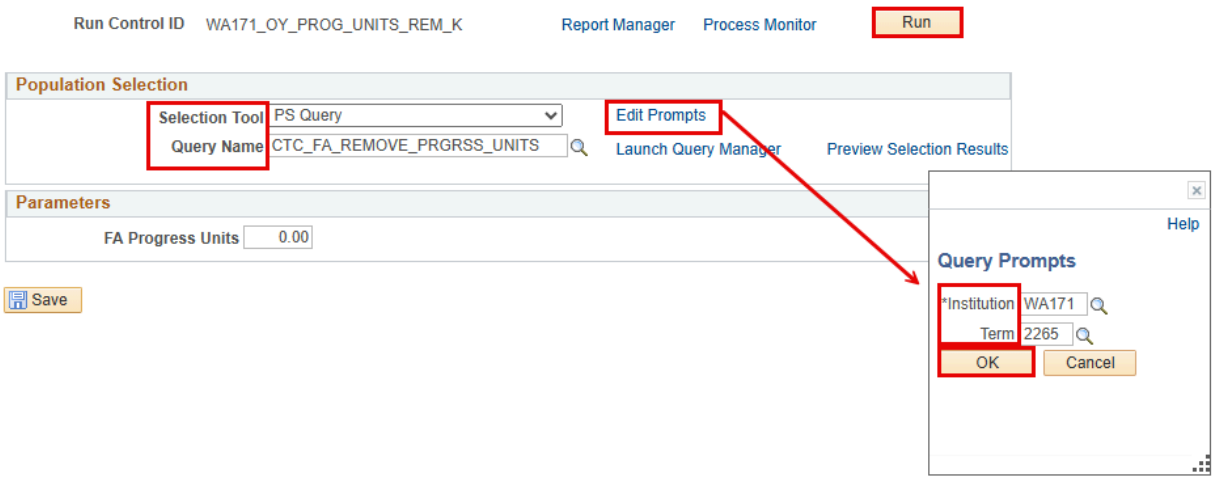
Navigation	Description
Financial Aid > Financial Aid Term > Update FA Progress Units	Updating FA Progress Units

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

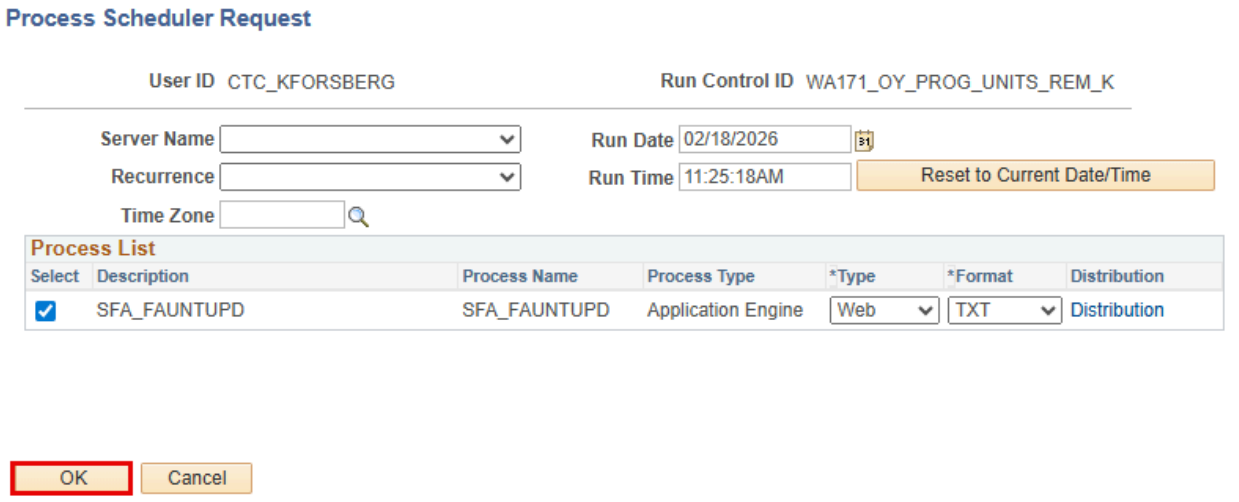
Enter New or Existing Run Control ID

From the Update FA Progress Units page enter the following information:

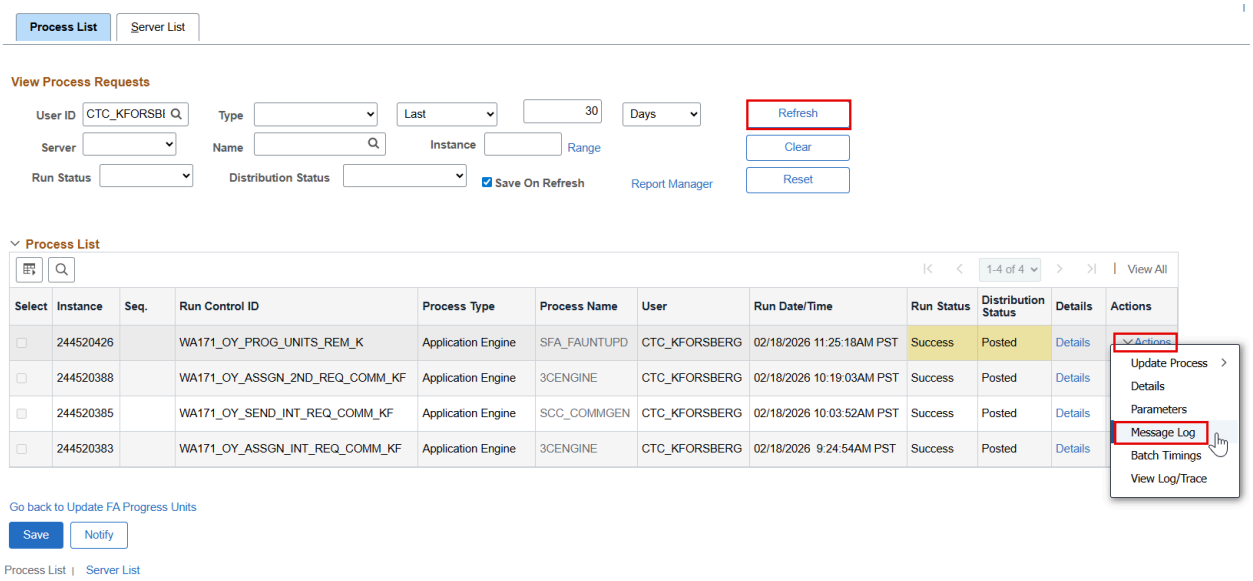
- **Selection Tool: PS Query**
- **Query Name: CTC_FA_REMOVE_PRGRSS_UNITS**
- **Enter Edit Prompts**
  - **Institution**
  - **Term – This Edit Prompt field will need to be updated at the start of each term**
- **Select Preview Selection Results to ensure students are being selected.**
- **FA Progress Units = 0.00**
- **Select the RUN button (If adding to a jobset, choose Save.)**



From the Process Scheduler Request page select OK



Ensure process runs to Success and Posted – Select the Actions Link and select Message Log



Review the Message Log to identify any records that could not be updated.

Message Log

Process

Instance:	209414148	**Type:**	Application Engine
Name:	SFA_FAUNTUPD	**Description:**	

1-8 of 8 | View All

Severity	Log Time	Message Text	Explain
10	3:07:58PM	Program SFA_FAUNTUPD Started	Explain
10	3:10:17PM	Total number of records read: 2	Explain
10	3:10:17PM	Total number of records updated: 2	Explain
10	3:10:17PM	Total number of records skipped due to duplicate data: 0	Explain
10	3:10:17PM	Total number of records not processed due to invalid data: 0	Explain
10	3:10:17PM	Program SFA_FAUNTUPD Completed	Explain
	3:10:22PM	Published message with ID 2cf5b02e-5b7f-11f0-becd-db8002086f71 to create entry in folder GENERAL.	Explain
	3:10:22PM	Successfully posted generated files to the report repository	Explain

Return

Building FA Terms in Batch

Navigation	Description
Financial Aid > Financial Aid Term > Create FA Term Driver Records	**Create FA Term driver records for the batch Financial Aid Term build process**

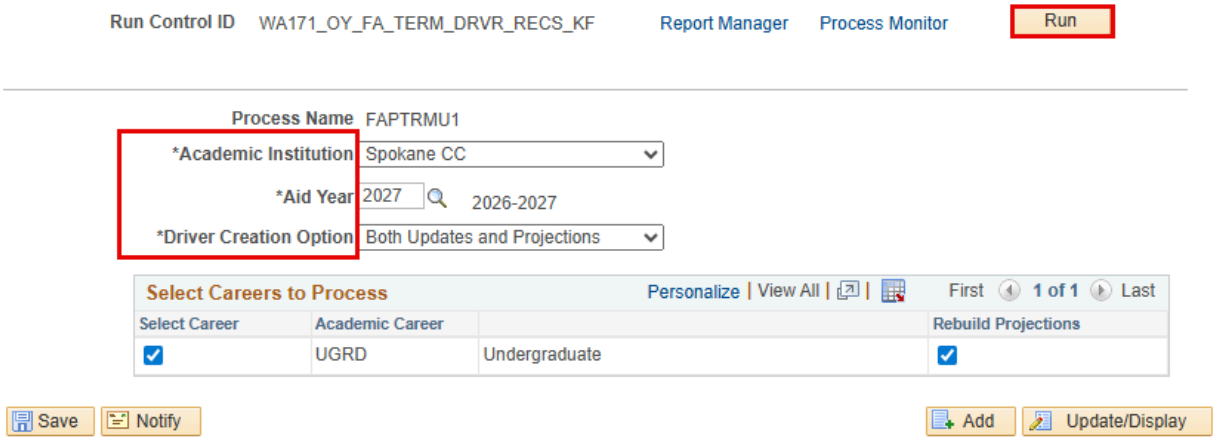
Part 1

Create FA Term Driver Records

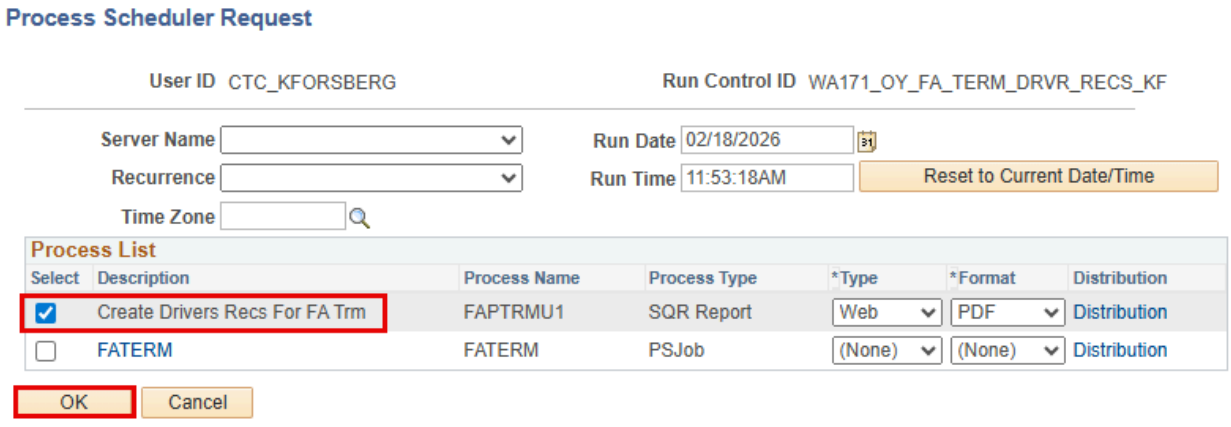
This process is part of your nightly ISIR JobSet but can be run ad hoc along with Batch FA Term. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**

2. **Populate the Academic Institution and Aid Year fields**
3. **Under the Driver Creation Option: select 'Both Updates and Projections' and select 'Run'**
4. **Verify that the Select Career and Rebuild Projections check boxes are selected for the 'UGRD' career**



***<u>Please Note –</u> When running the process please choose "Create Drivers Recs For FA Trm" at the Process Scheduler Request page**



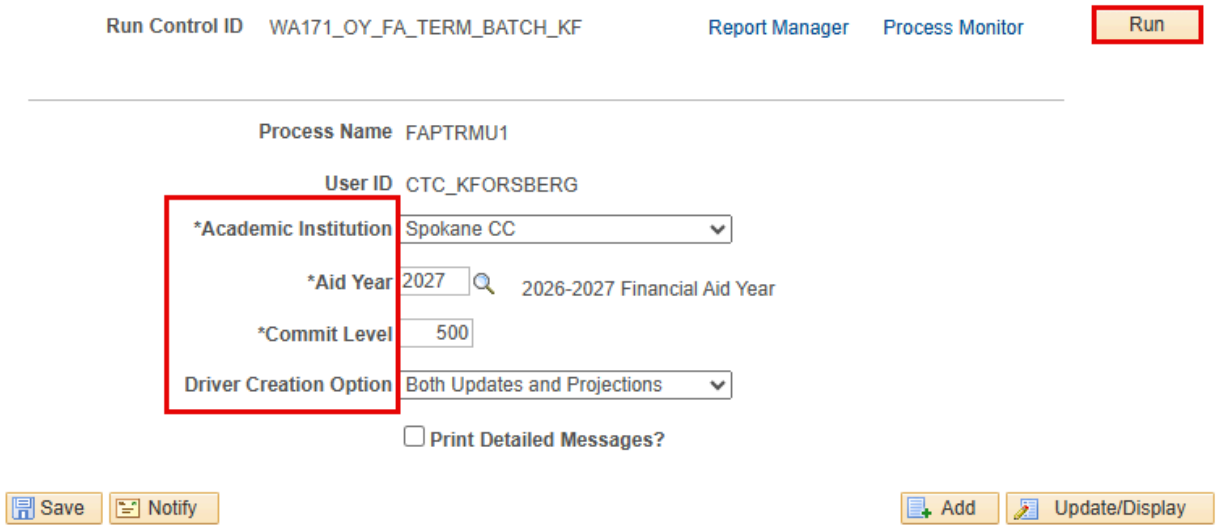
Part 2

Build FA Term in Batch

Navigation	Description
Financial Aid > Financial Aid Term > Build FA Term in Batch	**Create Financial Aid Terms in batch.**

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Populate Academic Institution and Aid Year fields**
3. **Commit Level will be '500' and Driver Creation option will be 'Both Update and Projections'**
4. **Leave Print Detailed Messages 'unchecked' and select Run or Select Save if adding the process to a JobSet**



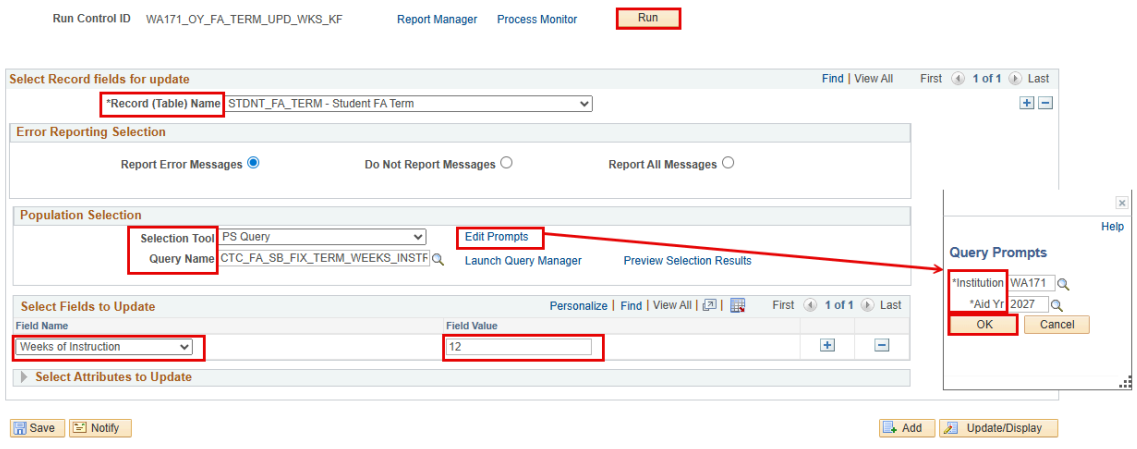
Weeks of Instruction Update

Population Selection Update – Run Control Set Up

Navigation	Description
Set up SACR > System Administration > Utilities > Population Update > Population Update Process	Updating the Weeks of Instruction on FA Term

This process is part of your nightly ISIR JobSet, but can be run ad hoc. Other FA Term processes will have to have been built for the most updated results when running ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Choose STDNT_FA_TERM – Student FA Term from the Record (Table) Name from the dropdown menu**
3. **Select the Report Error Messages radio button**
4. **Choose PS Query from the Selection Tool dropdown menu**
5. **Use the lookup tool next to the Query Name field to choose CTC_FA_SB_FIX_TERM_WEEKS_INSTR**
6. **Select Edit Prompts and enter Institution and Aid Year**
7. **For Field Name select Weeks of Instruction from the dropdown menu**
8. **For Field Value enter 12**
9. **Select Run (Select Save if adding to a JobSet)**
10. **Ensure process runs to "Success" and "Posted"**



Adding Housing into Budgets

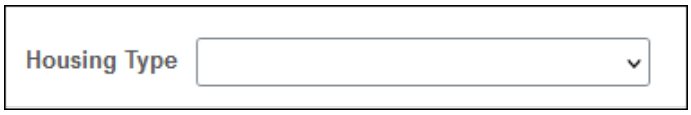
Security Prerequisites

Staff that wish to utilize the population update below will require Population Update Security for the **STDNT_AID_ATRBT** Record.

Global Default Value

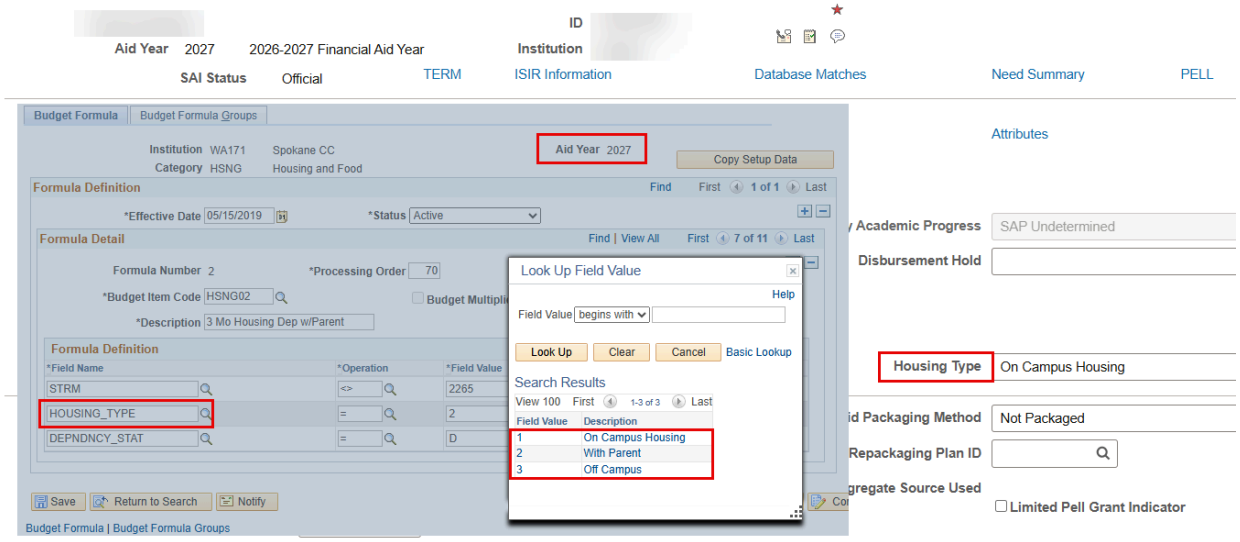
The global default value for the Projected Housing Type is set to *Off Campus*. When the nightly ISIR Jobset runs, CTCFABUD will build all students with a Housing Type of *Off Campus*.

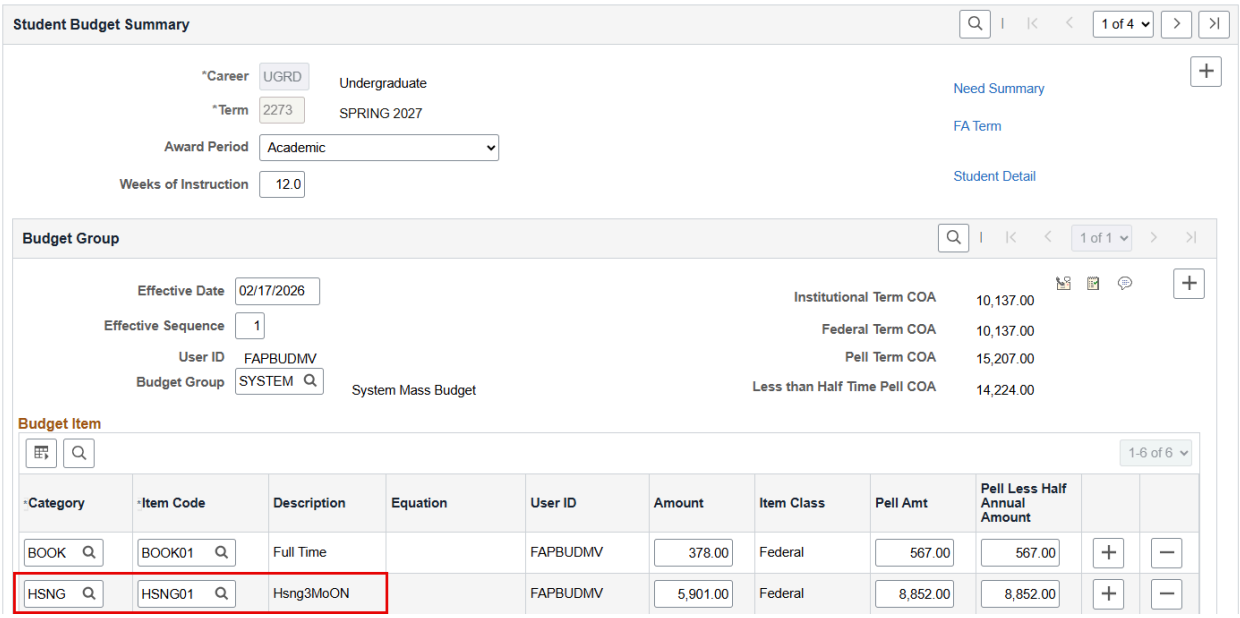
Note: The global default value of *Off Campus* will not automatically populate the Housing Type field on the *View Packaging Status Summary* page. The field will appear blank. The Housing Type field on *View Packaging Status Summary* page is only populated through the Housing Type population update process below or through manual intervention.



Housing Type field & Budget Formulas

Beginning with aid year 2025, the U.S. Department of Education removed the field for students to indicate their housing plan for each school that will receive their FAFSA. This change has also been implemented on the WASFA. Oracle updated budget processing to consider the selected Housing Type of the student. Budget formulas will read the selected Housing Type from the *View Packaging Status Summary* page or the global default to calculate the appropriate amount for the housing category on the *Maintain Student Budget* page.





The population update process below can be used to batch update students to a Housing Type of *With Parent* or *On Campus.*

Housing Type Pop Update

Creating csv file for External File

Navigation	Description
Reporting Tools > Query > Schedule Queries	**File Review Query**

Based on the results from the query below, staff can identify a population of students to create a csv file to pop update the Housing Type field on the View Packaging Status Summary page. The only required field for this process is EMPLID.

IMPORTANT: The projected housing type displayed on the query results pulls from *the Maintain Student Budget* page, not the value on the *View Packaging Status Summary* page.

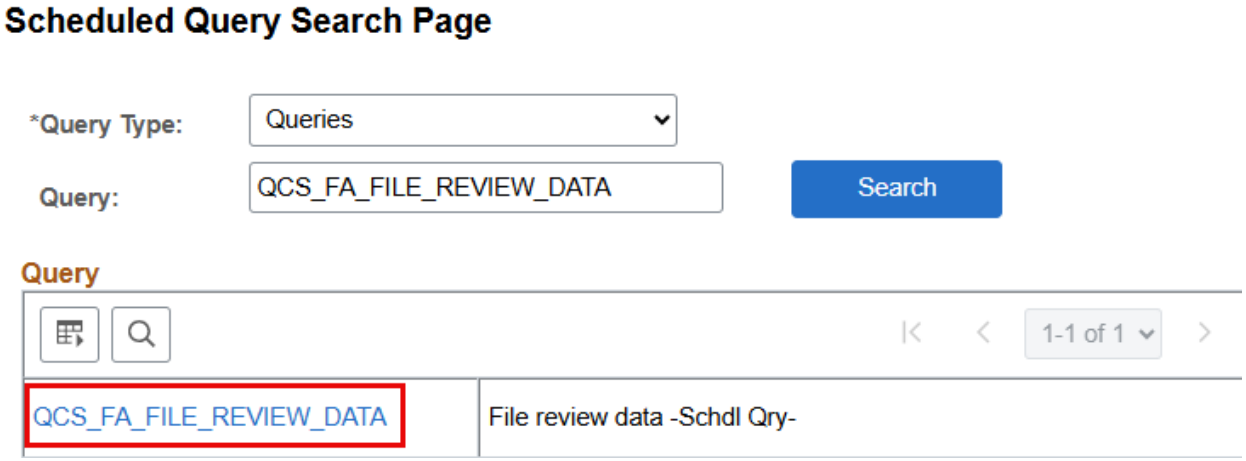
💡 **TROUBLESHOOTING TIP: If the QCS_FA_FILE_REVIEW_DATA query process goes to *No Success*, run QCS_FA_MISSING_NSLDS_LOAN_YEAR query as you may have some students missing values in FA Term that need cleaning up. Leaving the *NSLDS Loan Year* field blank will cause the global file review query QCS_FA_FILE_REVIEW_DATA to go to No Success causing the housing pop-update process to also go to No Success.**

Please make sure to select all required fields in FA Term as mentioned in the QRG (9.2 Manually Awarding Aid for a Student without a FAFSA | 9.2 FA - Packaging and Awards | ctcLink Reference Center) for students that appear in the QCS_FA_MISSING_NSLDS_LOAN_YEAR query results.

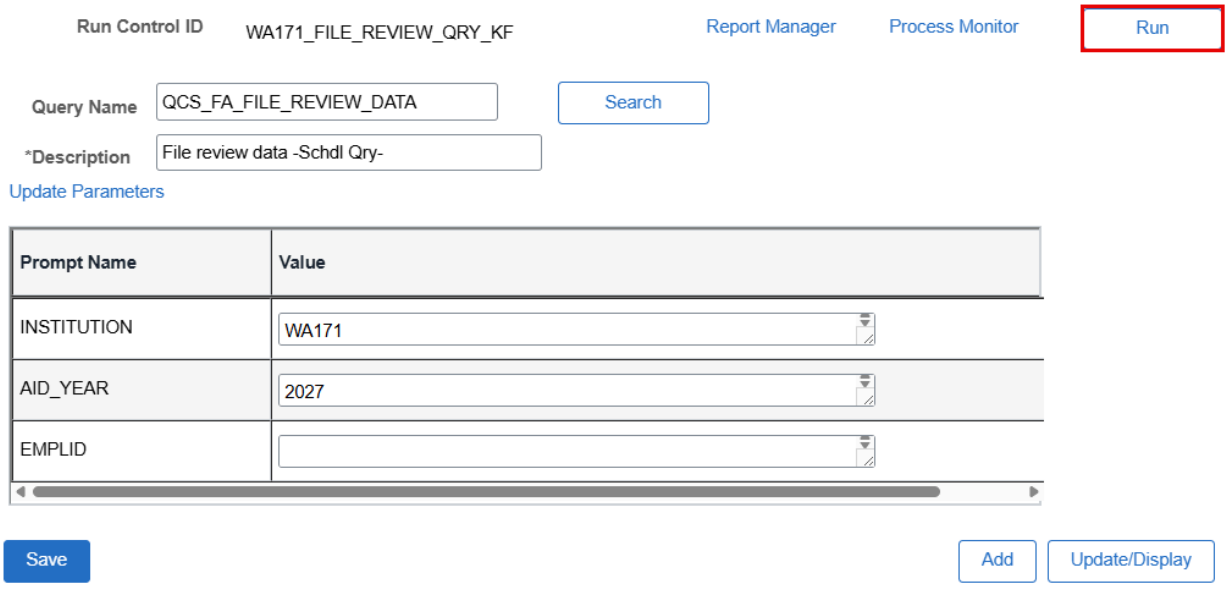
Note: If a list of students already exists, for example, the Housing Department provides a list of students living in the Dorm, skip to Step 11 to create the .csv file

1. Enter New or use existing Run Control ID

2. Enter the following query name and select **Search: QCS_FA_FILE_REVIEW_DATA**
3. From the Scheduled Query Search page, select the query name

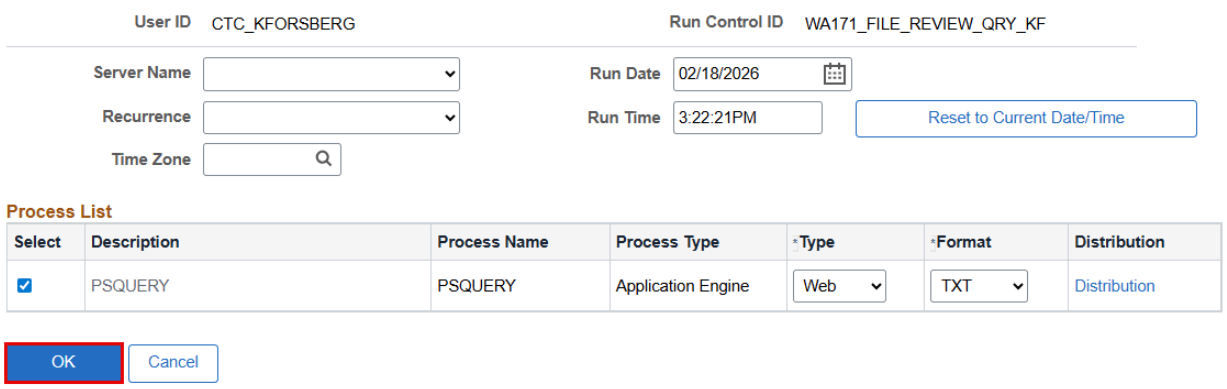


4. When the Edit Prompts open, enter the following:
   - Institution
   - Aid Year
5. Ensure the parameters are correct and select **Run**

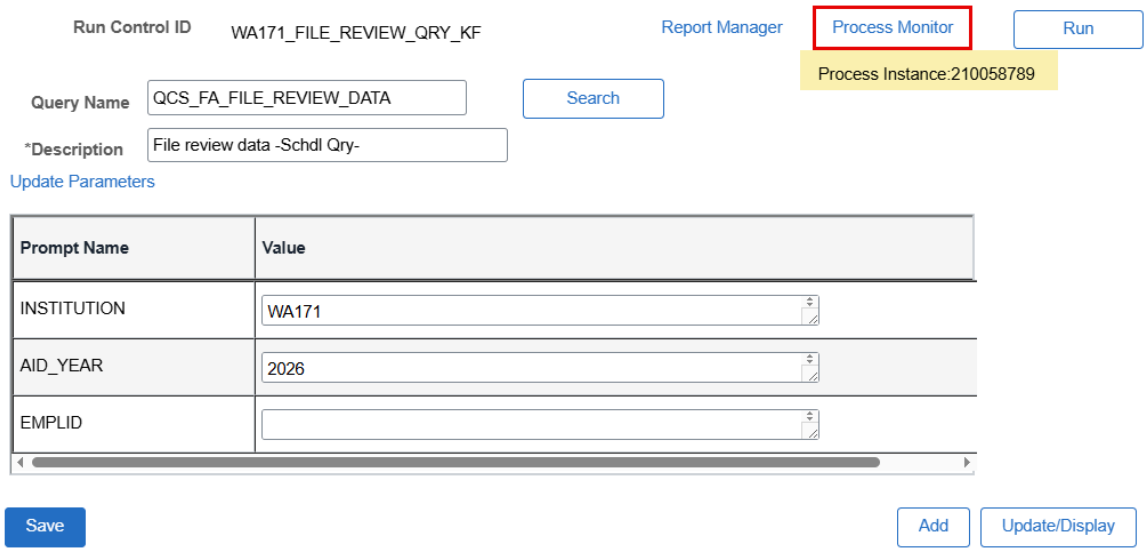


6. Select **OK** from the *Process Scheduler Request* page

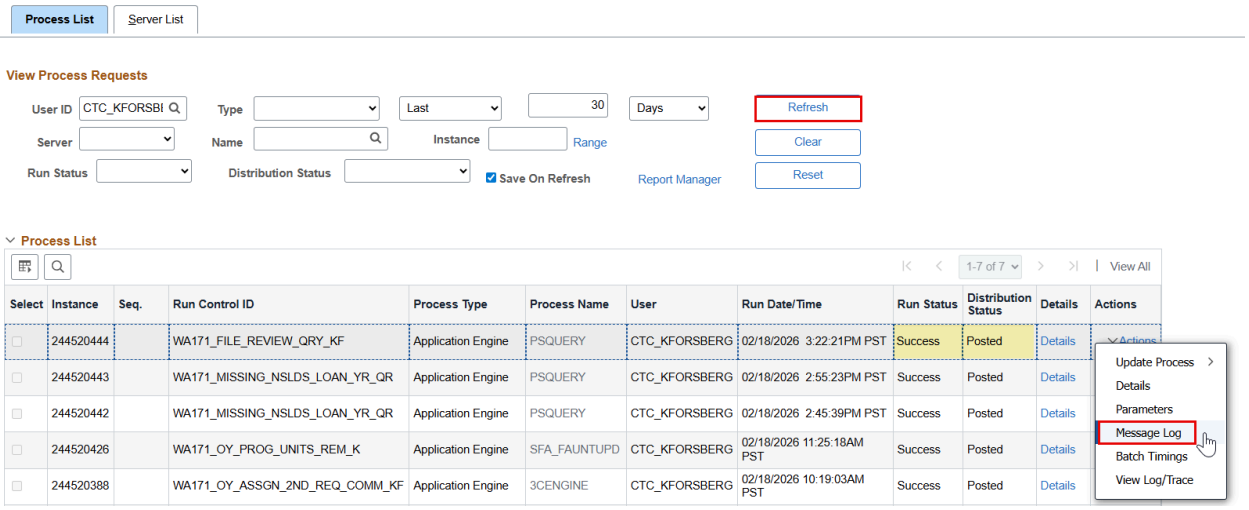
Process Scheduler Request

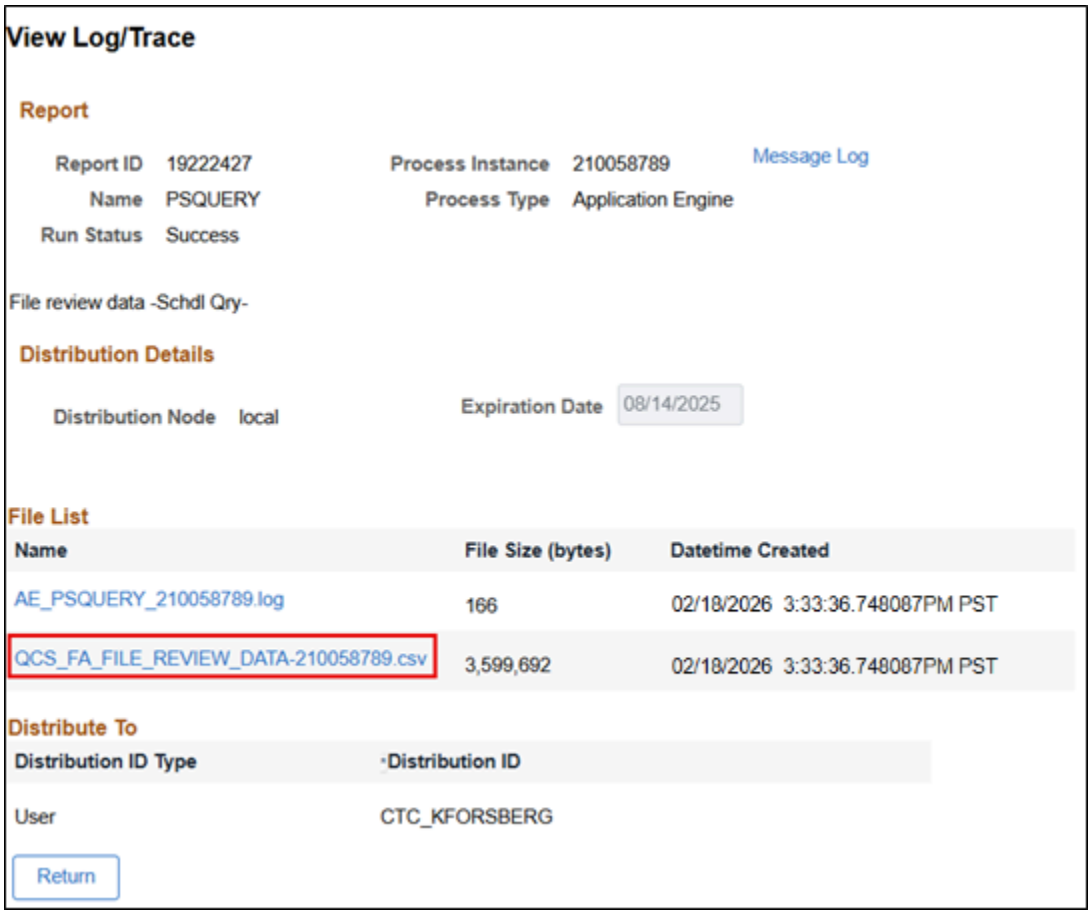


7. Select **Process Monitor** from the *Schedule Queries* page

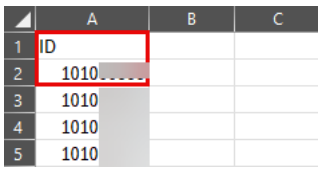


8. Ensure the process runs to **Success** and **Posted**
9. Select the **Actions** link and then the **View Log/Trace** Option to download the query results

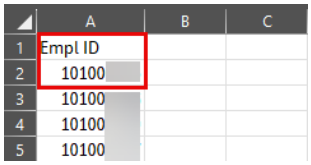




10. Filter query to identify the desired student population
11. Copy and paste the list of EMPLIDs into **column 1** of a new .csv file. *A header is required*. This header name can be either of the following: ***ID*** *or* ***Empl ID.***



or



12. When you are ready to save your file, select ***File*** then ***Save As*****.** The file must be saved as **CSV (comma delimited) (*csv)**



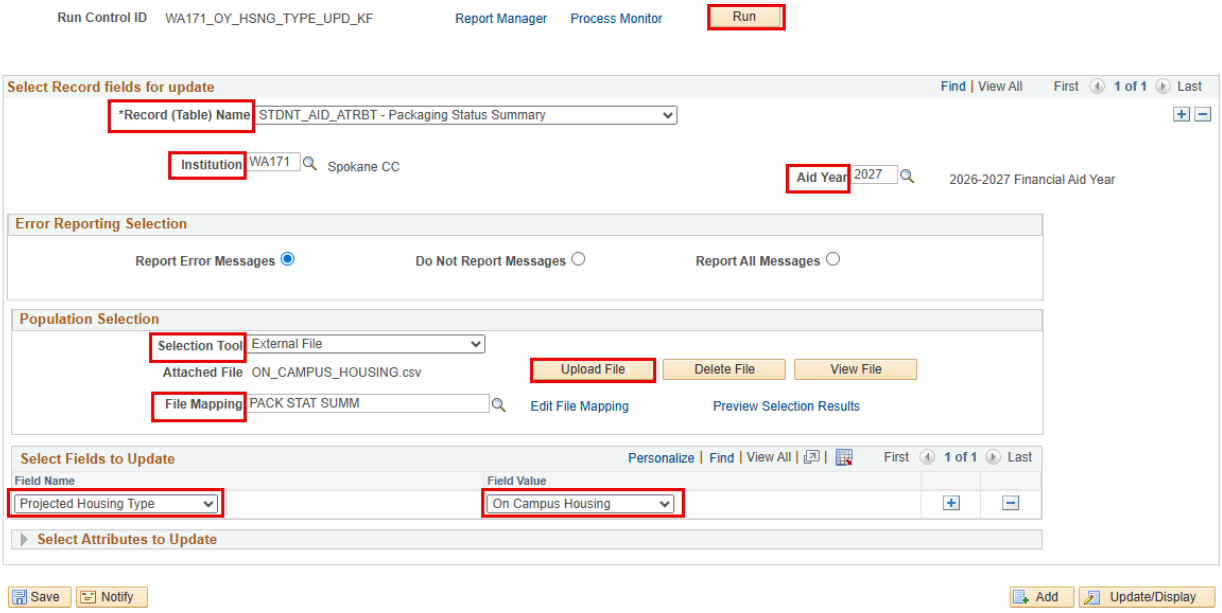
Note: **Do not open the csv file once it has been saved to your desktop.** Opening the csv may cause the file to error during processing.

Population Selection Update – Run Control Set Up

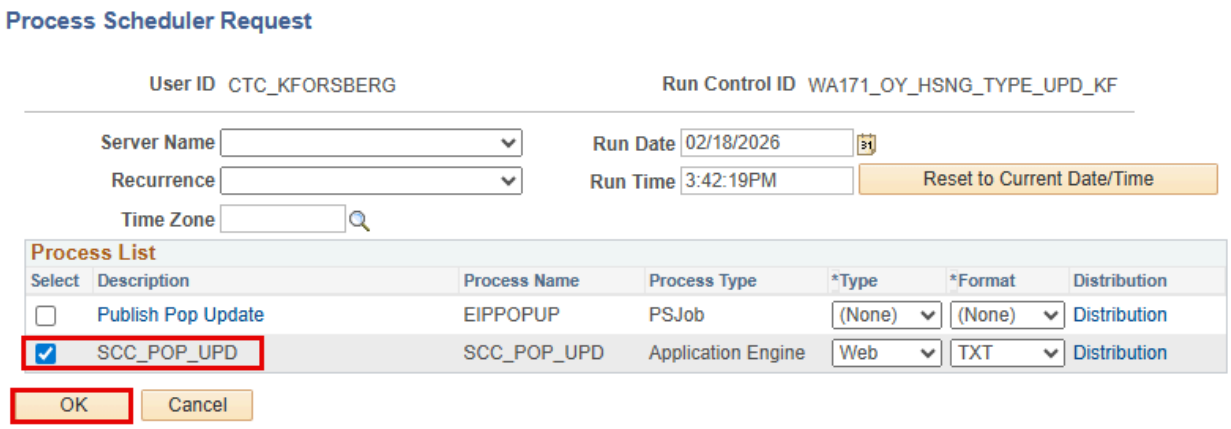
Navigation	Description
Set up SACR > System Administration > Utilities > Population Update > Population Update Process	**This process batch updates the Housing Type field on the View Packaging Status Summary page for the selected student population**

This process should be run on demand before the nightly ISIR Jobset is scheduled to run, so that CTCFABUD can pick up any changes to students' Housing budget. When this pop update runs, it will automatically flip the Budget Required field in FA Term to Yes for the terms in the aid year. **(*This will occur on an existing row, it will not insert a new effective dated row in FA Term. However, maintain student budgets will have a new effective dated row*)**

1. Enter New or use existing Run Control ID
2. **Choose STDNT_AID_ATRBT –** Packaging Status Summary from the Record (Table) Name from the dropdown menu
3. Enter the following:
   - Institution
   - Aid Year
4. Select the **Report Error Messages** radio button
5. Choose **External File** from the **Selection Tool** dropdown menu
6. Select **Upload File**
   - This will load the list of EMPLIDs from the "***Creating Csv File for External File***" step above
   - Students can be verified in Preview Selection Results
7. Use the lookup tool next to File Mapping to choose **PACK STAT SUMM**
8. For **Field Name** select **Projected Housing Type** from the dropdown menu
9. For **Field Value** select the appropriate housing type for the population of students in your file **(On Campus or With Parent)**
10. Select **Run**



11. From the *Process Scheduler Request* page ensure **SCC_POP_UPD** is selected. Then Select **OK.**



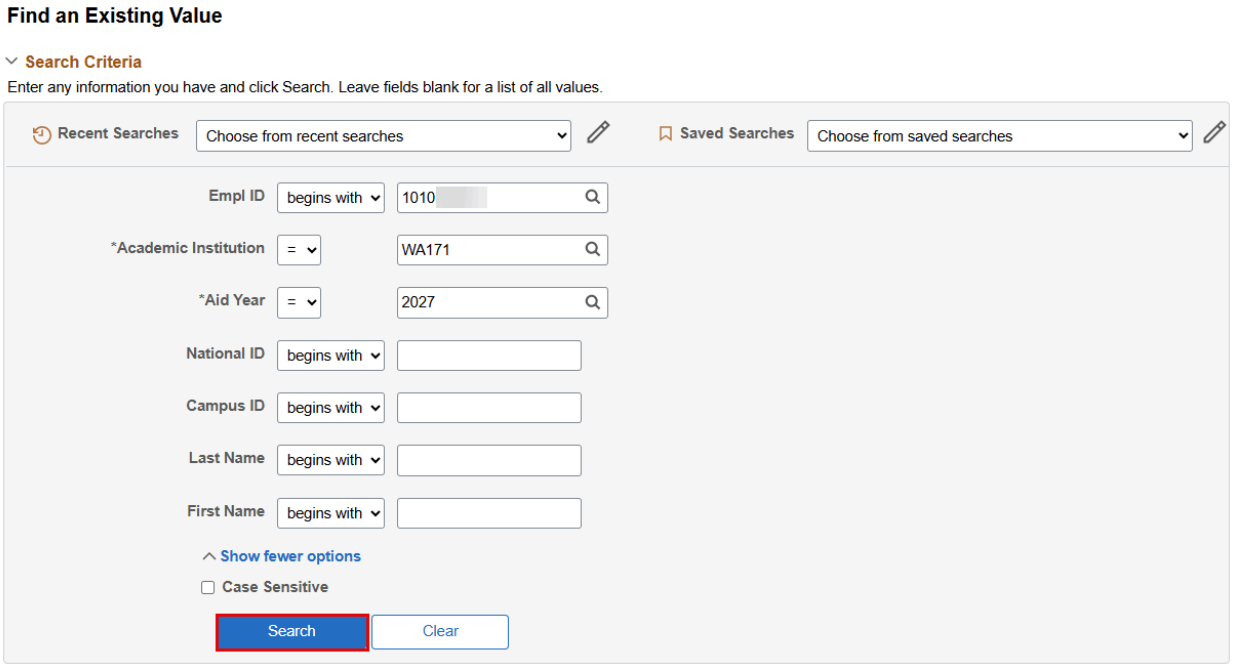
12. Ensure process runs to "**Success**" and "**Posted**"

Manually Updating Housing Type Field

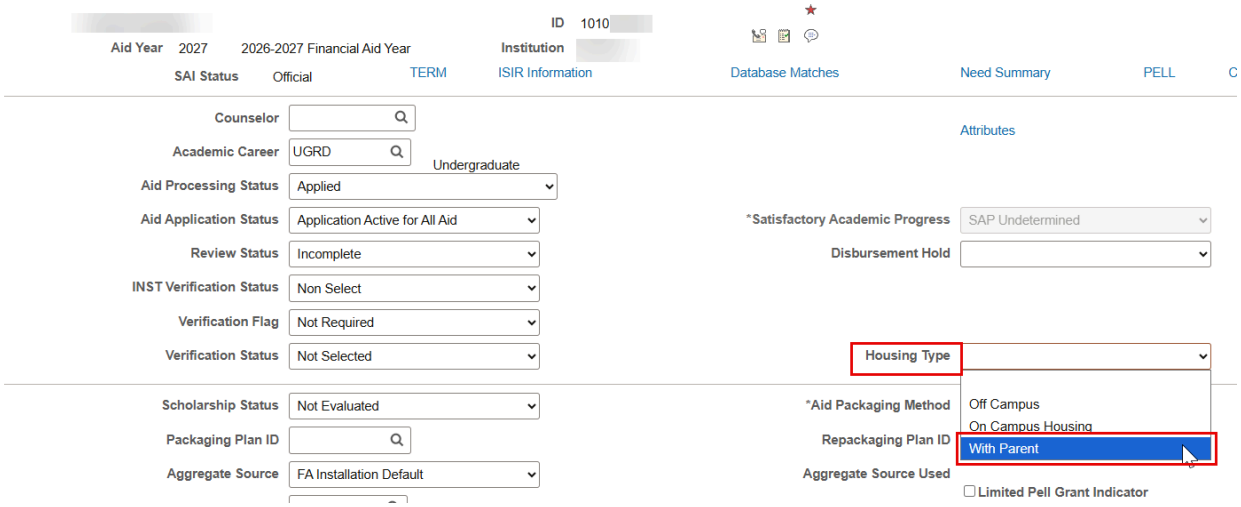
Navigation	Description
Financial Aid > View Packaging Status Summary	**Update the Housing Type field on the View Packaging Status Summary page for an individual student**

From the *View Packaging Status Summary* page enter the following criteria and select **Search**:

- Empl ID
- Institution
- Aid Year



Update the **Housing Type** field to the desired value. Select **Save** when complete



Staff can navigate to *Create Student Budget* to manually rebuild the student's budget to reflect the updated Housing Type. Alternatively, the CTCFABUD job in the nightly ISIR jobset will pick up any changes to the students' housing budget.

Assigning Student Budgets

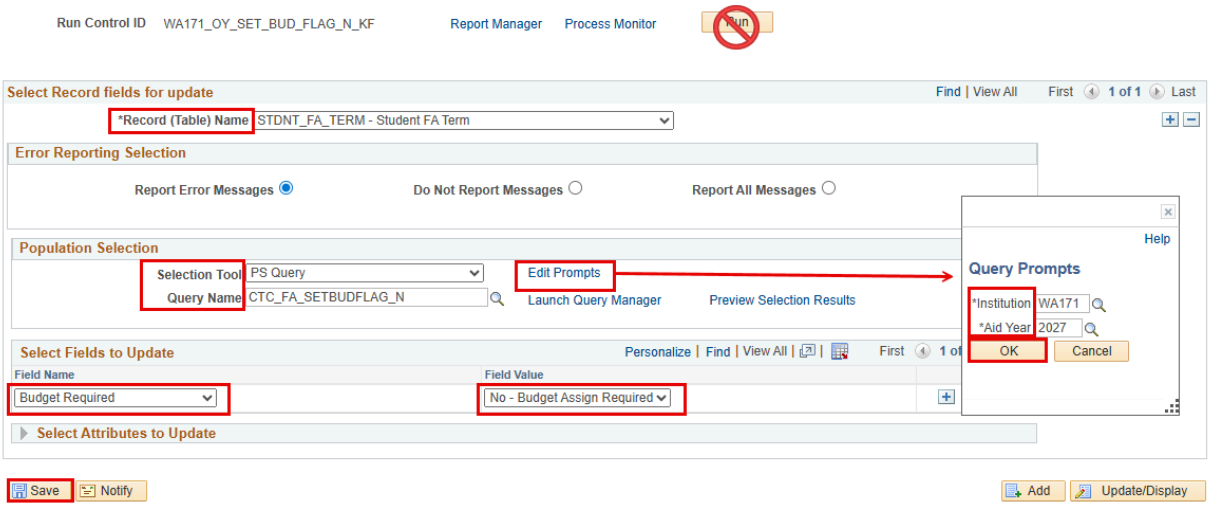
Setting Budget Flag Update Process

Set Budget Required Flag to "N" = "No Budget Assign"

(Do Not Use with Enrollment Based Budgeting)

Navigation	Description
Set up SACR > System Administration > Utilities > Population Update > Population Update Process	Updating the budget flag that keeps a student's budget from rebuilding

1. Enter New or use existing Run Control ID
2. Choose STDNT_FA_TERM – Student FA Term from the Record (Table) Name from the dropdown menu
3. Select the Report Error Messages radio button
4. Choose PS Query from the Selection Tool dropdown menu
5. Use the lookup tool next to the Query Name field to choose CTC_FA_SETBUDFLAG_N
6. Select Edit Prompts and enter Institution and Aid Year
7. For Field Name select Budget Required from the dropdown menu
8. For Field Value select No-Budget Assign Require from the dropdown menu
9. Select Save - DO NOT SELECT RUN

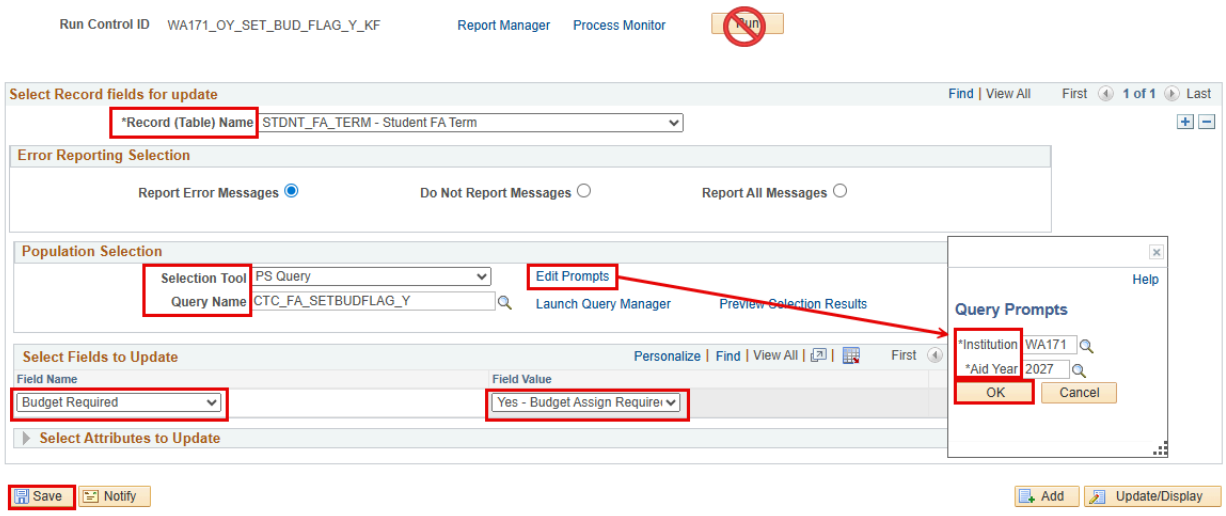


Set Budget Required Flag to "Y" = "Assign Budget"

Navigation	Description
Set up SACR > System Administration > Utilities > Population Update > Population Update Process	Updating the budget flag that allows a student's budget to be built

This process is part of your nightly CTCFABUDYEAR nested JobSet within your ISIR JobSet. When building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button.

1. **Enter New or use existing Run Control ID**
2. **Choose STDNT_FA_TERM – Student FA Term from the Record (Table) Name from the dropdown menu**
3. **Select the Report Error Messages radio button**
4. **Choose PS Query from the Selection Tool dropdown menu**
5. **Use the lookup tool next to the Query Name field to choose CTC_FA_SETBUDFLAG_Y**
6. **Select Edit Prompts and enter Institution and Aid Year**
7. **For Field Name select Budget Required from the dropdown menu**
8. **For Field Value select Yes-Budget Assign Require from the dropdown menu**
9. **Select Save – DO NOT SELECT RUN**



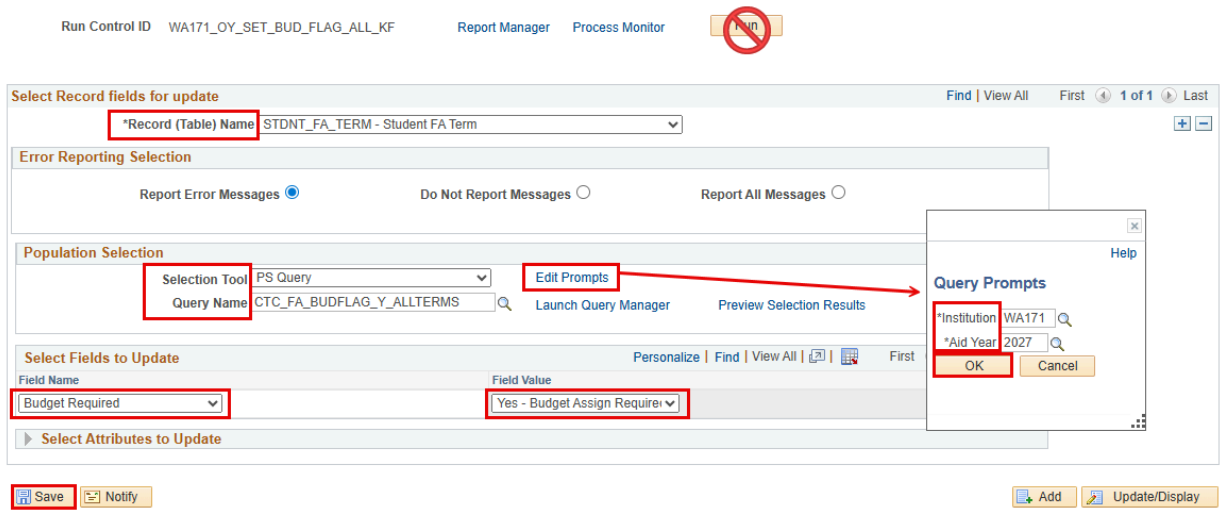
Set Budget Required Flag to "Y" = "Assign Budget" for ALL Terms

(Use with Enrollment Based Budgeting Only)

Navigation	Description
Set up SACR > System Administration > Utilities > Population Update > Population Update Process	Updating the budget flag that allows a student's budget to build for ALL terms

This process is part of your nightly CTCFABUDYEAR nested JobSet within your ISIR JobSet. When building this Run Control ID to enter into a JobSet, you will select the Save button.

1. **Enter New or use existing Run Control ID**
2. **Choose STDNT_FA_TERM – Student FA Term from the Record (Table) Name from the dropdown menu**
3. **Select the Report Error Messages radio button**
4. **Choose PS Query from the Selection Tool dropdown menu**
5. **Use the lookup tool next to the Query Name field to choose CTC_FA_BUDFLAG_Y_ALLTERMS**
6. **Select Edit Prompts and enter Institution and Aid Year**
7. **For Field Name select Budget Required from the dropdown menu**
8. **For Field Value select Yes-Budget Assign Require from the dropdown menu**
9. **Select Save – DO NOT SELECT RUN**

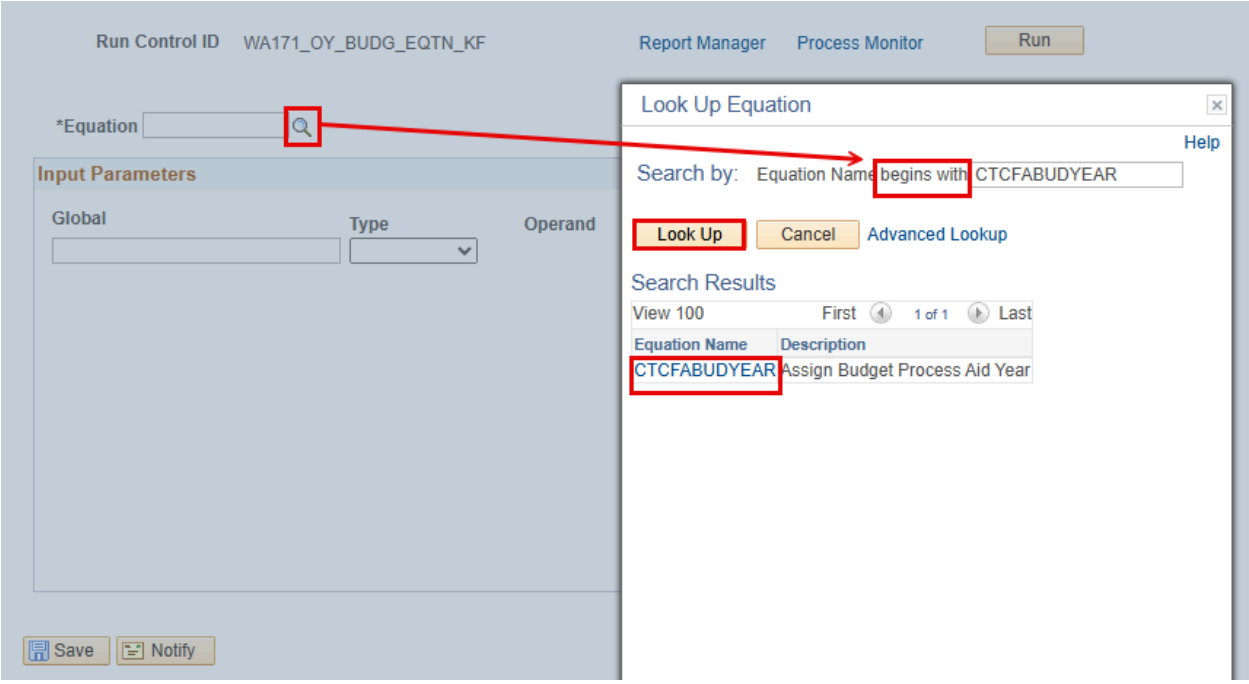


Creating Budget JobSet

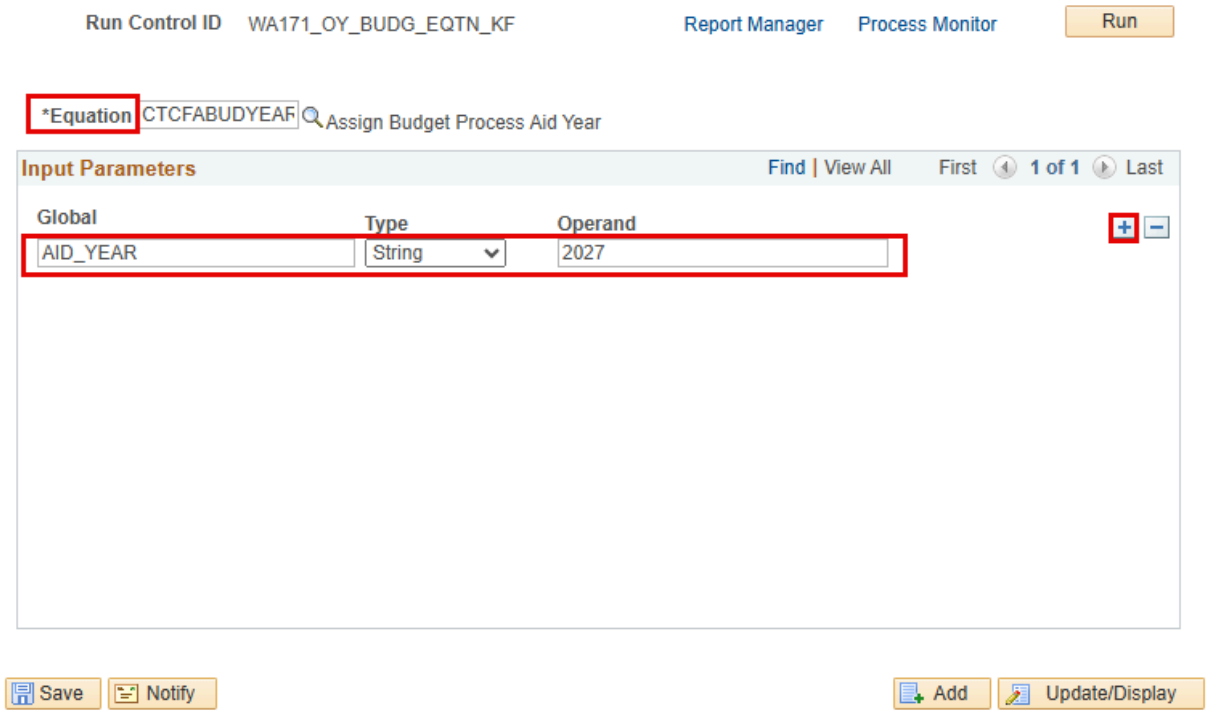
Navigation	Description
Set up SACR > Common Definitions > Equation Engine > Run Equation	**Processing the rules and equations built to construct student budgets.**

This process is the step to build the CTCFABUDYEAR equation to be built in the nested CTCFABUD JobSet to be run within your ISIR JobSet. When building this Run Control ID, you will select the Save button.

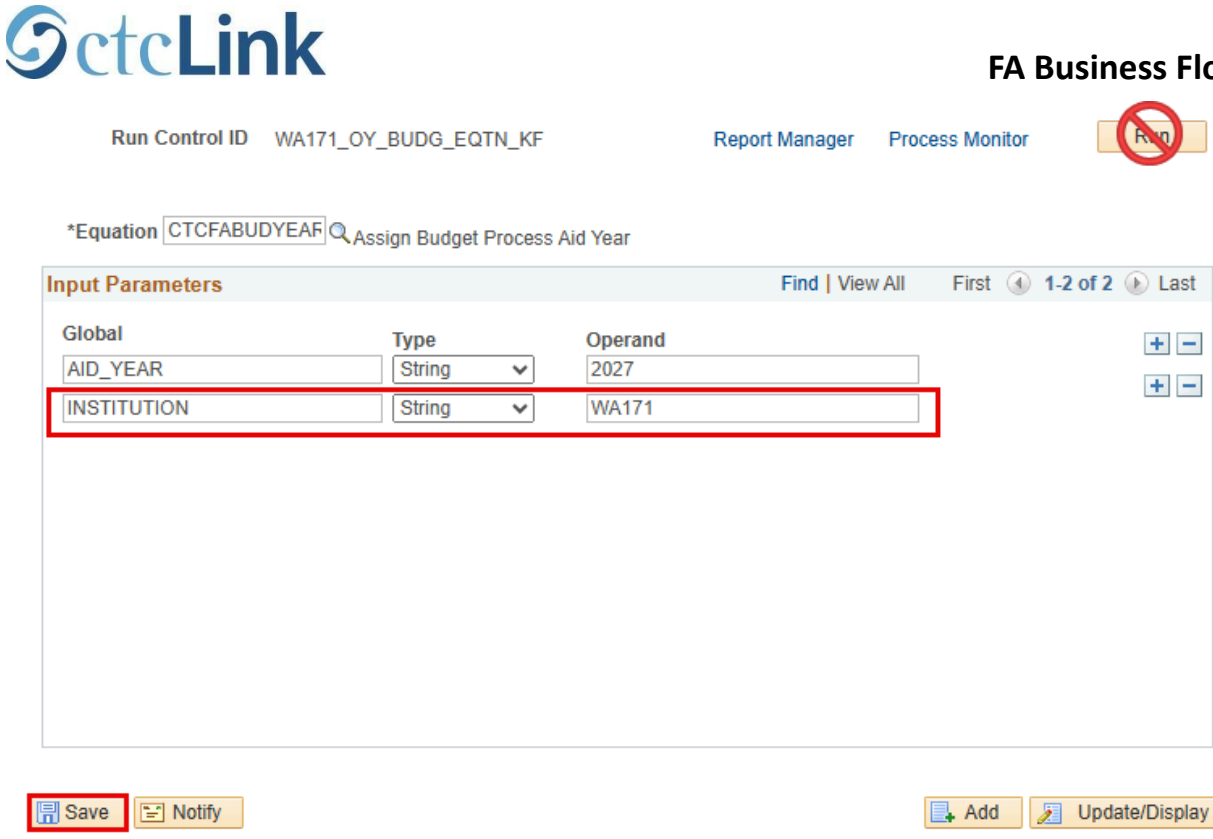
1. **Enter New or use existing Run Control ID**
2. **From the Run An Equation page use the lookup tool to locate the budget equation CTCFABUDYEAR (Assign Budget Process Aid Year)**



3. **Under Input Parameters populate fields with the following information:**
    a. **Populate the Global field with AID_YEAR**
    b. **Populate the Type field with String (*Note – The Operand field will not appear until the Type field is populated)**
    c. **Populate the Operand field with the current aid year (example 2027)**



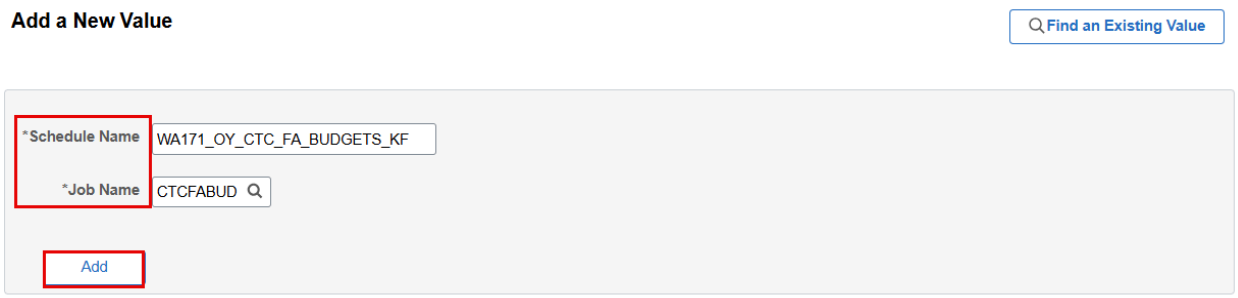
4. **Insert a new row by selecting (+)**
5. **Enter the following data:**
    a. **Populate the Global field with INSTITUTION**
    b. **Populate the Type field with String (*Note – The Operand field will not appear until the Type field is populated)**
    c. **Populate the Operand field with the Institution ID**
6. **Select Save – DO NOT SELECT RUN**


Run Control ID WA171_OY_BUDG_EQTN_KF
Report Manager
Process Monitor
Run
*Equation CTCFABUDYEAF
Assign Budget Process Aid Year
Input Parameters
Find | View All
First 1-2 of 2 Last
Global
Type
Operand
AID_YEAR
String
2027
INSTITUTION
String
WA171
Save
Notify
Add
Update/Display

Schedule Budget JobSet

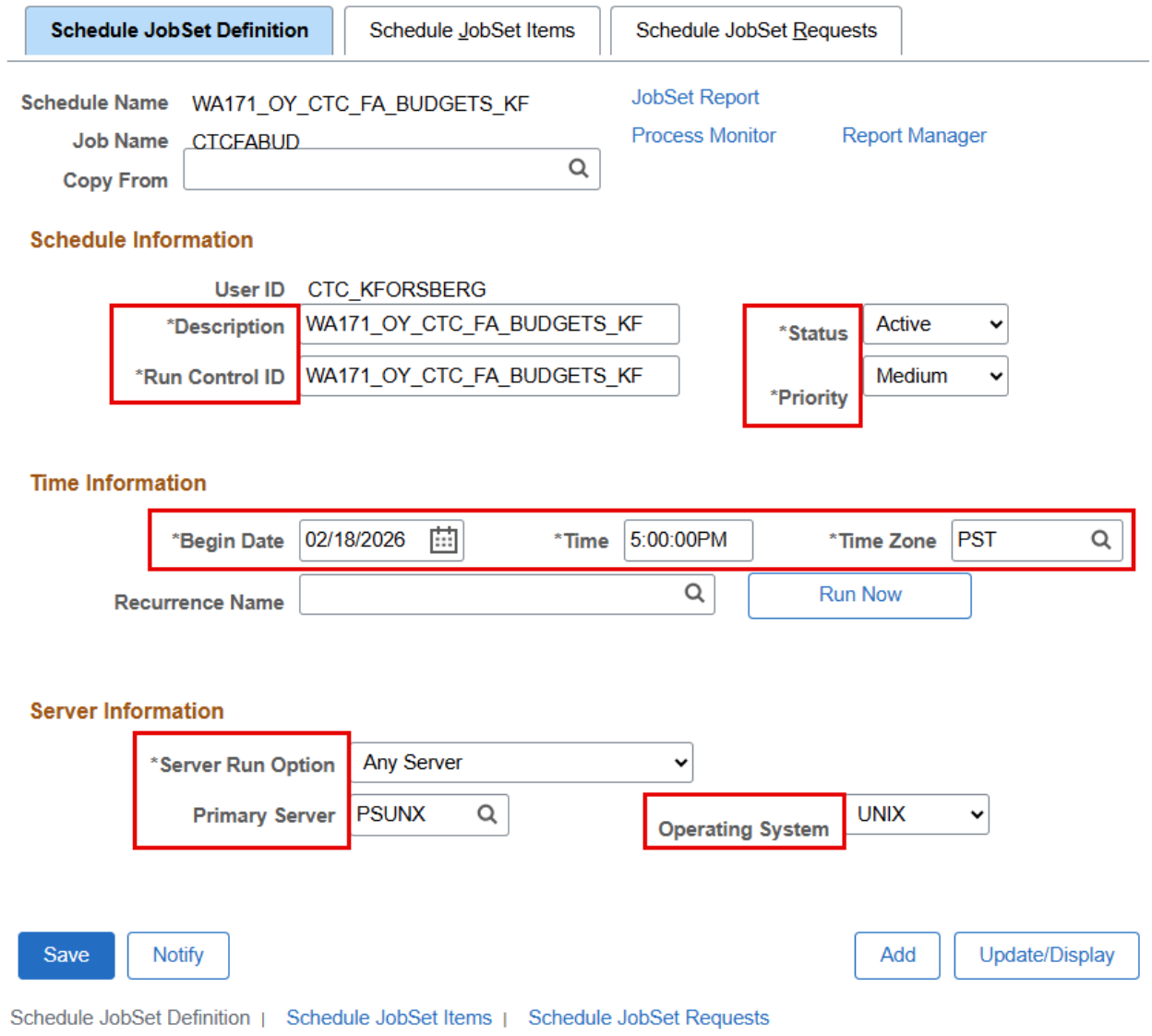
Navigation	Description
PeopleTools > Process Scheduler > Schedule JobSet Definitions	Run the Event Replay Schedule load job to set the process recurrence.

1. Create the Schedule Name
2. Enter the Job Name CTCFABUD
3. Select Add



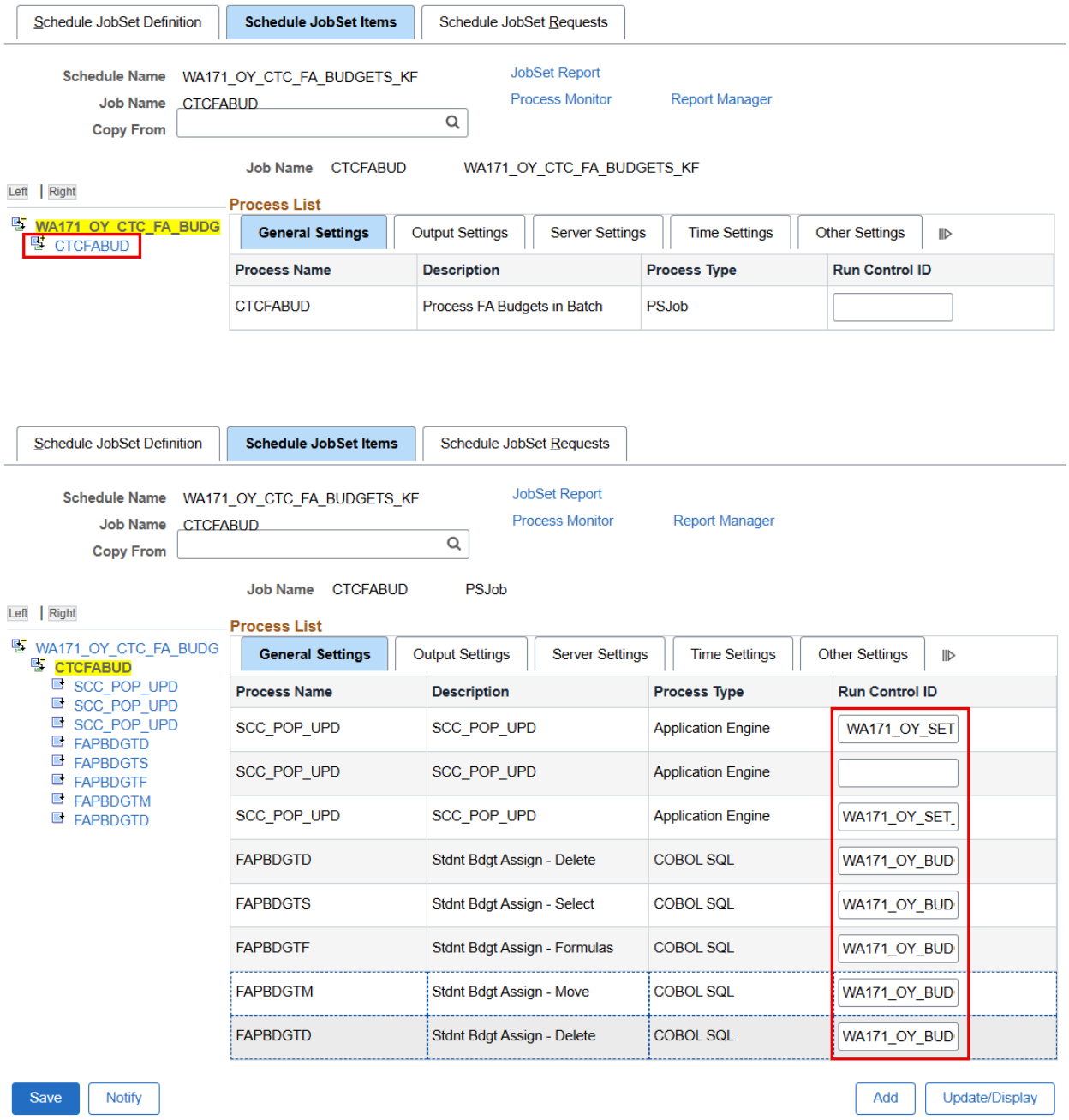
Schedule JobSet Definition tab

1. From the Schedule JobSet Definition tab populate the following fields:
    a. Enter the 'Institution Specific Description' into the Description field
    b. Enter 'Institution Specific Information' into the Run Control ID field
    c. Verify 'Status' field value = Inactive if running now, Active if scheduling
    d. Verify 'Priority' field vale = Medium
    e. Define Begin Date, Time and Time Zone reflects the current date and time, if running now.
    f. Define Recurrence Name field if running in a JobSet
    g. Select 'Any Server' for the Server Run option
    h. Primary Server = PSUNX
    i. Enter 'UNIX' for the Operating System



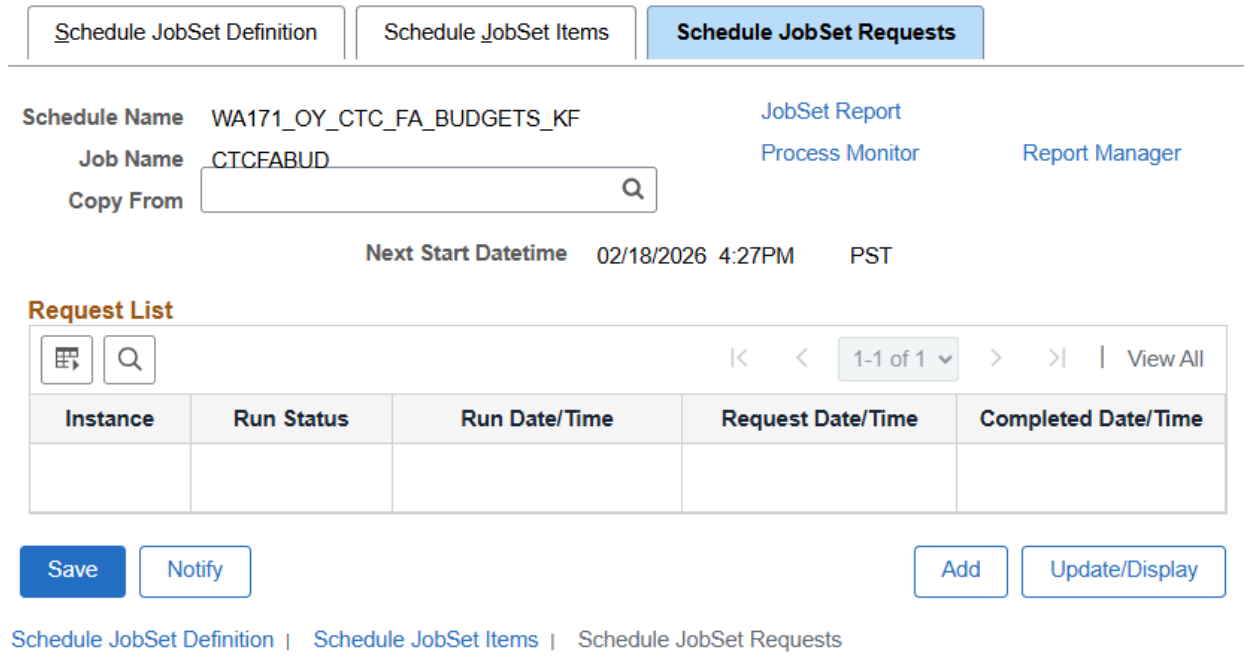
Schedule JobSet Items tab

1. **From the Schedule JobSet Items tab select on the CTCFABUD hyperlink**
2. **When the Process List opens Populate the fields**
    a. **SCC_POP_UPD = Run Controls for the Set Budget flag**
    b. **FAPPREQRN – FAPBDGTD = Run Control for Equation Engine (see above)**



Schedule JobSet Requests tab

No Data Required

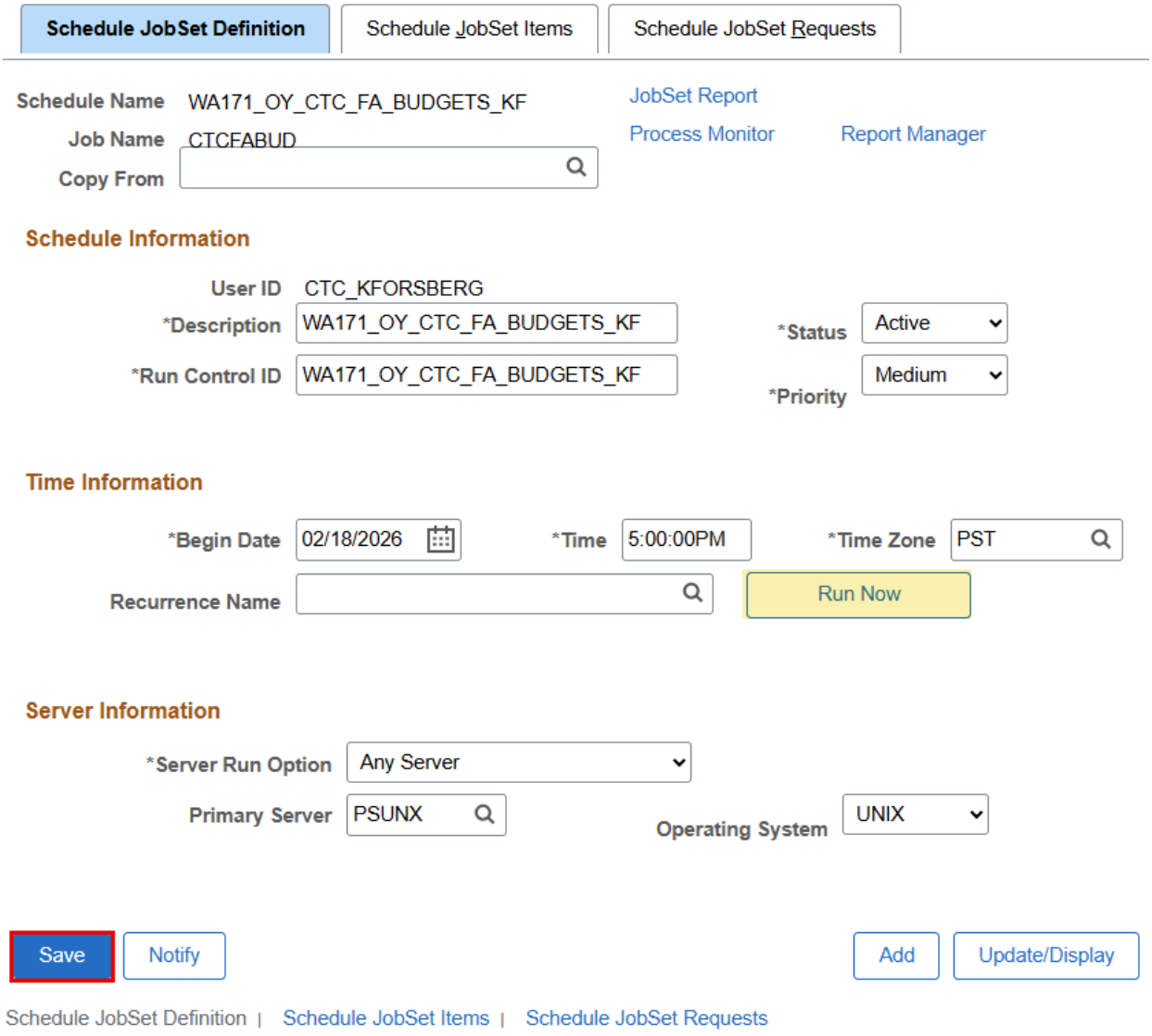


Select the Schedule JobSet Definitions tab

If running ad hoc, select the Run Now button

NOTE: Selecting the Run Now button, no Process Monitor Instance Number will be assigned. <u>Do not press Run Now more than once!</u>

If running in the ISIR JobSet, select the Save button.


Schedule JobSet Definition
Schedule JobSet Items
Schedule JobSet Requests
Schedule Name WA171_OY_CTC_FA_BUDGETS_KF
Job Name CTCFABUD
Copy From
JobSet Report
Process Monitor
Report Manager
Schedule Information
User ID CTC_KFORSBERG
*Description WA171_OY_CTC_FA_BUDGETS_KF
*Run Control ID WA171_OY_CTC_FA_BUDGETS_KF
*Status Active
*Priority Medium
Time Information
*Begin Date 02/18/2026
*Time 5:00:00PM
*Time Zone PST
Recurrence Name
Run Now
Server Information
*Server Run Option Any Server
Primary Server PSUNX
Operating System UNIX
Save
Notify
Add
Update/Display
Schedule JobSet Definition | Schedule JobSet Items | Schedule JobSet Requests

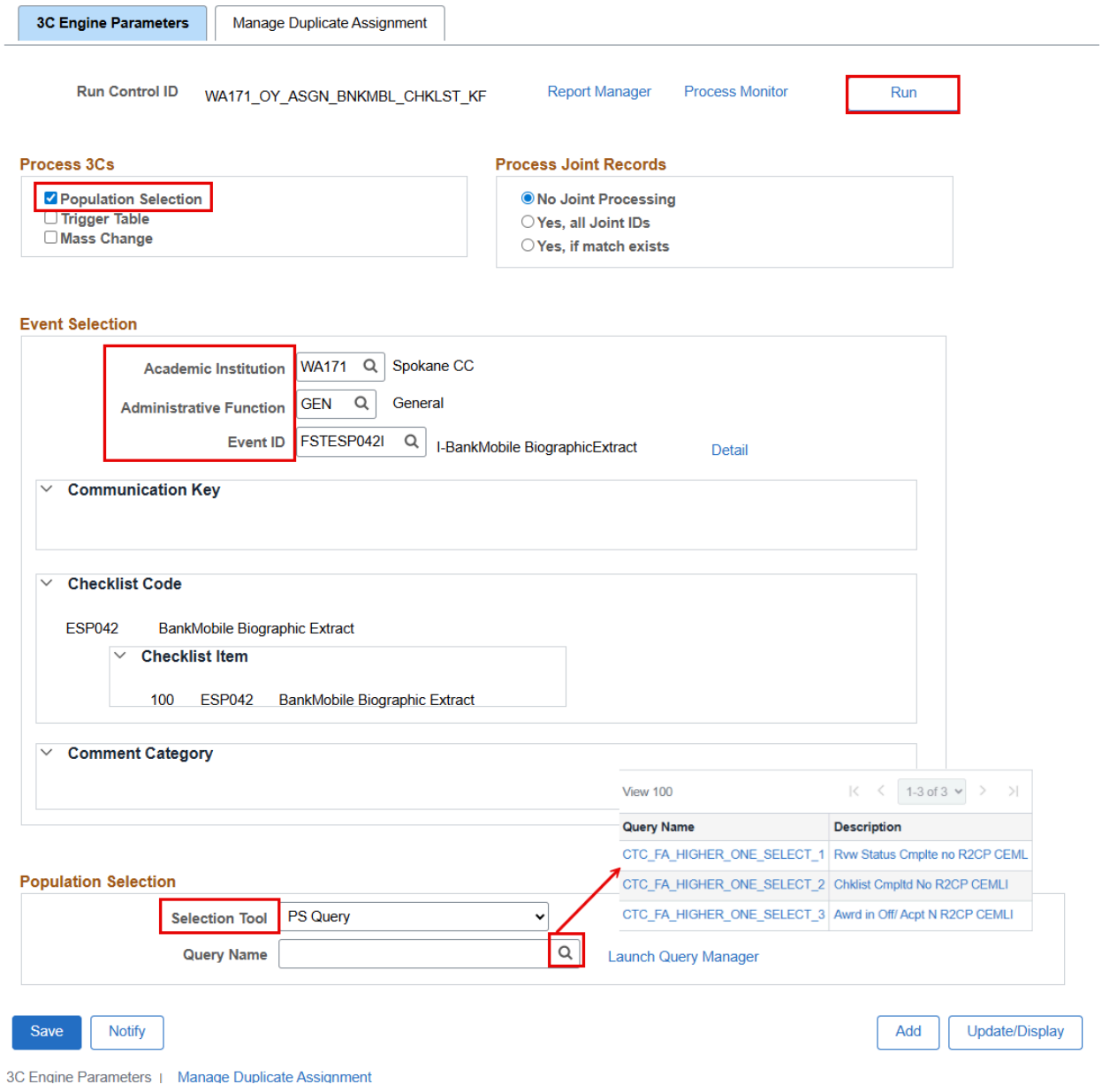
BankMobile

Running BankMobile Options

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Running BankMobile Options for Student Financials to process

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

1. **Enter New or use existing Run Control ID**
2. **Select the Population Selection check box**
3. **Under Event Selection populate the following fields:**
    a. **Academic Institution**
    b. **Administrative Function = GEN**
    c. **Event ID (*Note: this is institution specific) – Always select the Event ID value that ends with an "I" (Student Financials will be completing the checklist during their process)**
4. **Under Population Selection choose PS Query from the dropdown menu**
5. **Choose one of the three Higher One query options for the Query Name field**
    a. **CTC_FA_HIGHER_ONE_SELECT_1 (Selects students that have their Institutional Review Status Completed) – *If selected, run before Packaging***
    b. **CTC_FA_HIGHER_ONE_SELECT_2 (Selects students that have a specific checklist item marked completed. Example: Institutional Form) – *If selected, run after Budget Assignment***
    c. **CTC_FA_HIGHER_ONE_SELECT_3 (Selects students that have at least one FA Item Type in an offered or accepted status) – *If selected, run after Awarding***
6. **Enter the Edit Prompts**
    a. **Academic Institution**
    b. **Aid Year**
7. **Select Run**



WA State Need Grant

This process is part of your nightly ISIR JobSet but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

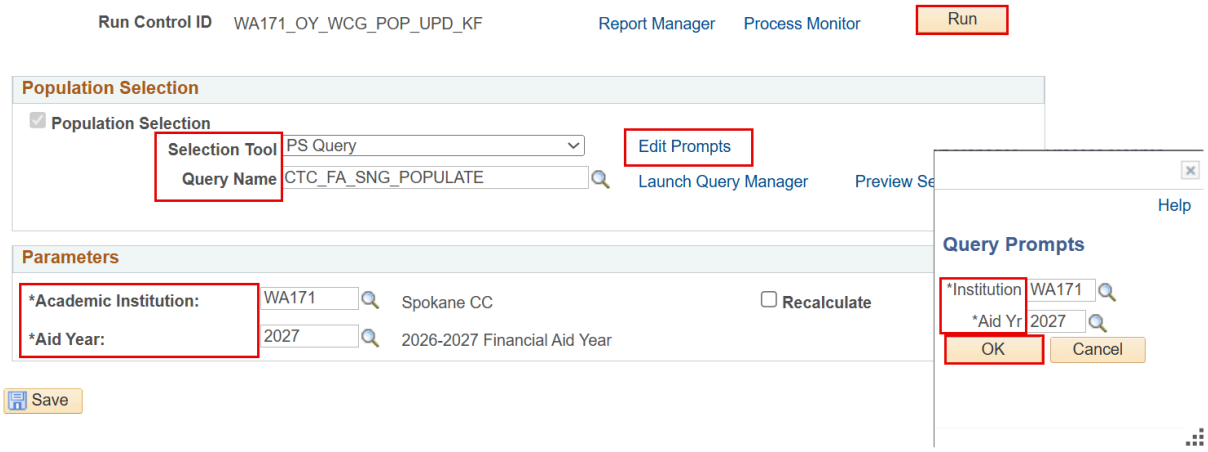
WCG Pop Update

Navigation	Description
Financial Aid > CTC Custom > CTC Interfaces > Washington College Grant > WCG Population/Update	**Selects students who have a valid ISIR for the Aid Year, active FA Term(s), and budgets assigned. The process loads all applicable data into the SNG Eligibility Table**

Enter a New or Existing Run Control ID

- **Selection Tool = PS Query**
- **Use look up tool to find the Query Name: CTC_FA_SNG_POPULATE**
- **Select Edit Prompts and enter the following:**
  - **Institution**
  - **Aid Year**
- **Under the Parameters section enter Institution and Aid Year**
- **Select Preview Selection Results and review student list (OPTIONAL)**
- **Select Run**

Disclaimer
Students are REQUIRED to have FA Term and Budgets built in order for them to be picked up in this process.



The Recalculate checkbox allows colleges to run a batch recalculation for all students whenever a change to the WCG setup is made.

For example, when WSAC updates WCG award amounts or the income cutoff on the MFI chart, colleges that have already loaded ISIRs and run the WCG calculation processes for a new aid year, the "Recalculate" checkbox will allow students that are already calculated to have their eligibility recalculated.

The recalculation process would normally be run only once per year, if necessary.

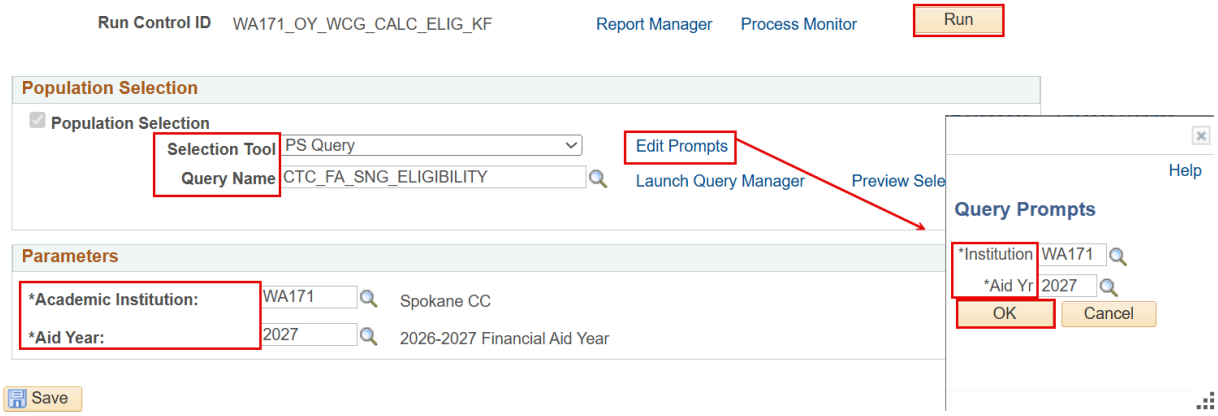
Populate WCG Eligibility Fields

Navigation	Description
Financial Aid > CTC Custom > CTC Interfaces > Washington College Grant > Calculate WCG Eligibility	**Calculates and populates eligibility fields for students who were loaded into the SNG table during the population/update process.**

This process is part of your nightly ISIR JobSet, but can be run ad hoc. If you are building this Run Control ID to enter into a JobSet, you will define the parameters and then select the Save button. If running ad hoc, select the Run button.

Enter a New or Existing Run Control ID

- **Selection Tool = PS Query**
- **Use look up to find the Query Name: CTC_FA_SNG_ELIGIBILITY**
- **Select Edit Prompts and enter the following:**
  - **Institution**
  - **Aid Year**
- **Under the Parameters section enter Institution and Aid Year**
- **Select Preview Selection Results and review student list (OPTIONAL)**
- **Select Run**



WCG Archive Outbound Process

It is the institution's responsibility to check for eligibility prior to awarding and disbursing WCG funds each term.

This process is NOT part of your nightly ISIR JobSet and needs to be run *at least* quarterly and always before a disbursement run.

The WCG Archive is utilized to track:

- **WCG history through the most current annual reconciliation**
- **Eligibility information:**

- Outstanding/defaulted WCG repayments
- Prior associate degrees within WCG program
- Maximum term usage with warnings

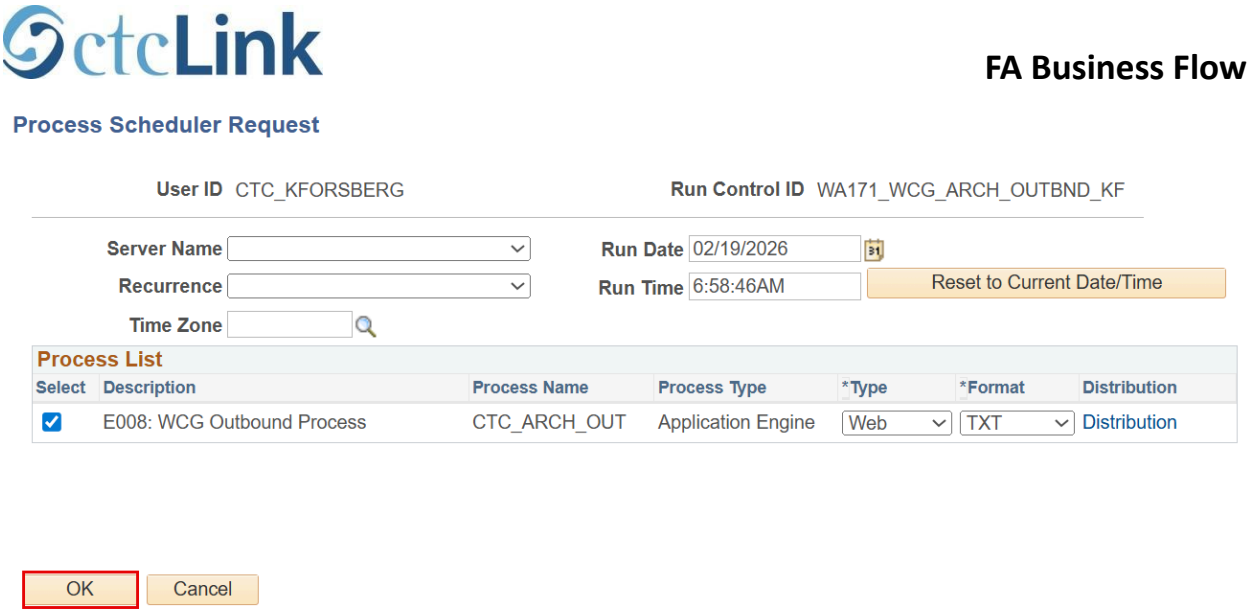
Navigation	Description
Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Archive Outbound	Process selects students who have a record on the WCG Eligibility Data page and generates a file which allows colleges to download then upload to the WSAC Secure Portal

Enter a New or Existing Run Control ID

- Enter Institution and Aid Year
- Check/Uncheck the 'Select Eligible Only' box
  - By checking the box the file will include only WCG eligible students. By unchecking the box, both eligible and ineligible students will be included in the file.
- Select Run



From the Process Scheduler Request page select the Select box and select OK

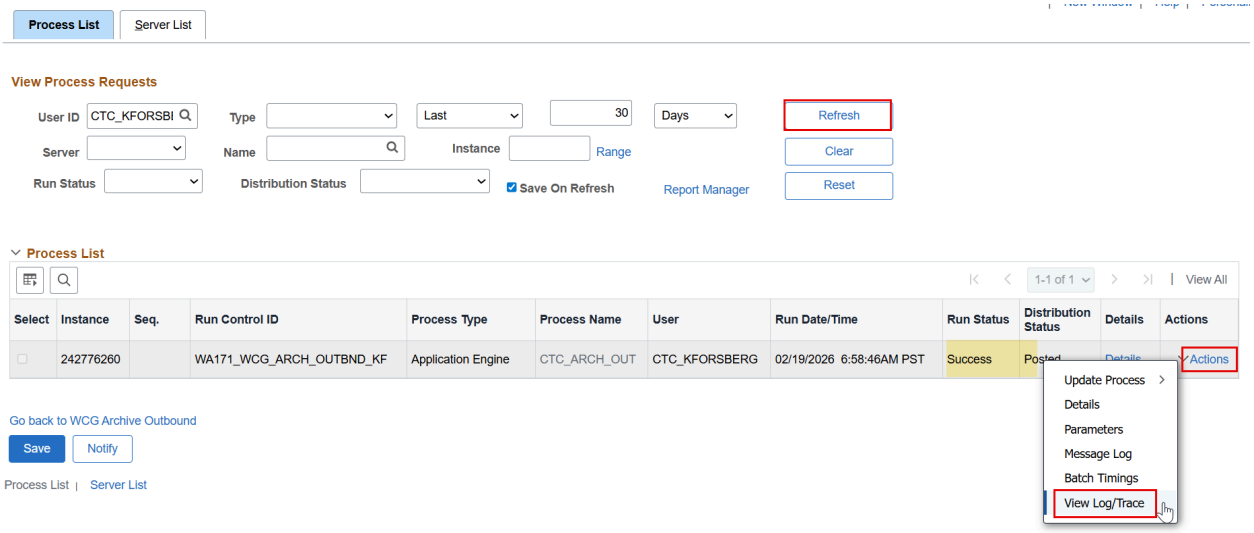


Ensure process runs to Success and Posted

From the WCG Archive Outbound page select Process Monitor



From the Process List select Actions link and then select the View/Log Trace option



From View Log/Trace select WCGArchiveOutbound_20xx.txt

View Log/Trace

Report

Report ID	22037291	Process Instance	242776260	Message Log
Name	CTC_ARCH_OUT	Process Type	Application Engine	
Run Status	Success			

E008: WCG Outbound Process

Distribution Details

Distribution Node	local	Expiration Date	03/21/2026

File List

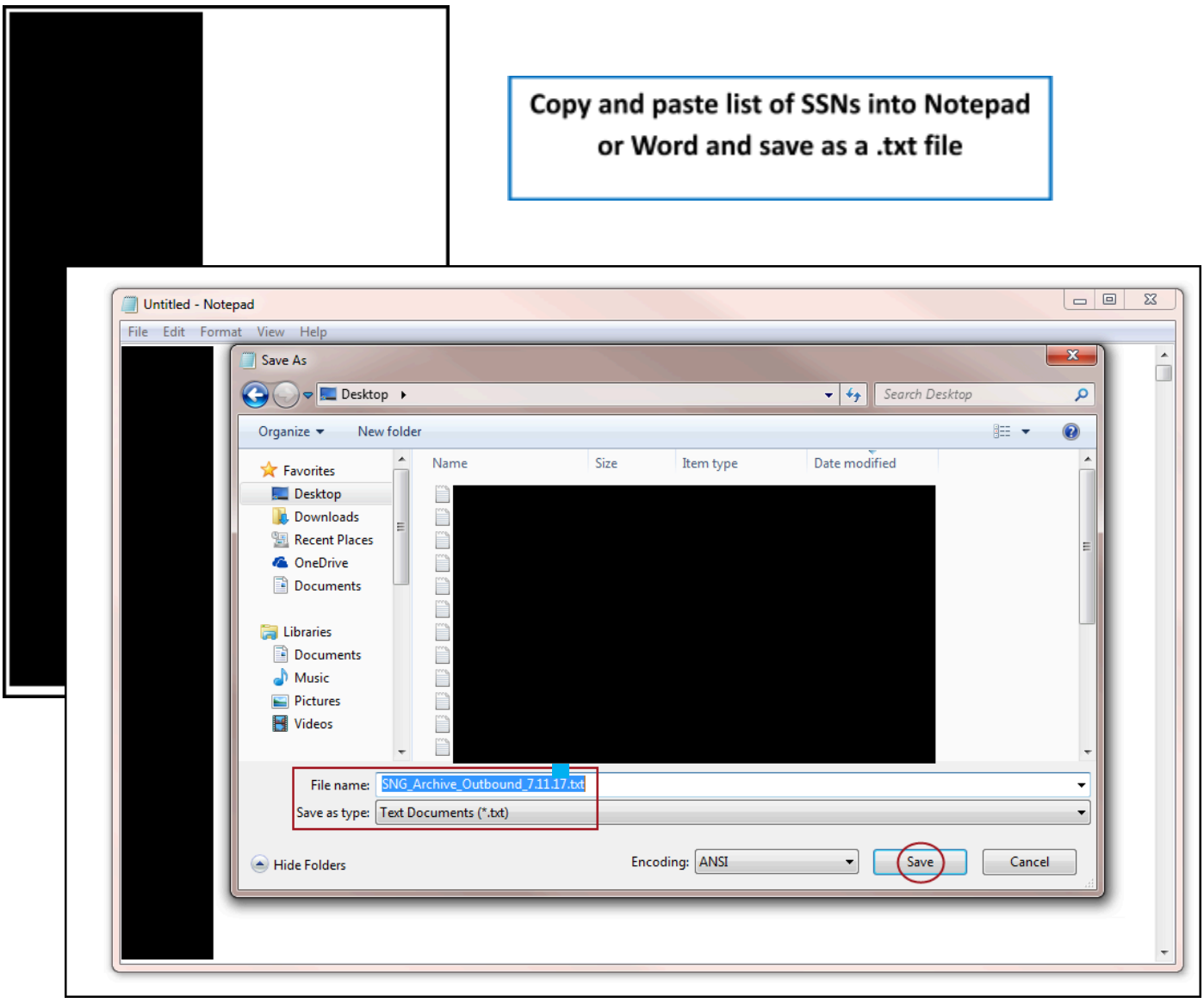
Name	File Size (bytes)	Datetime Created
AE_CTC_ARCH_OUT_242776260.log	205	02/19/2026 7:00:22.662323AM PST
WCG Archive Logfile_242776260.log	1,198	02/19/2026 7:00:22.662323AM PST
WCGArchiveOutbound_2027.txt	48,340	02/19/2026 7:00:22.662323AM PST

Distribute To

Distribution ID Type	*Distribution ID
User	CTC_KFORSBERG

Return

A list of SSNs will open



- **Process the file using the WSAC WCG Archive**
- **Once you process the file through the WCG Archive, DO NOT open the file. Instead, save it directly to your desktop. The format of the file should remain as .csv**

Instructions for using the WSAC Portal can be found at the WSAC resources site.

http://www.wsac.wa.gov/FAA-resources

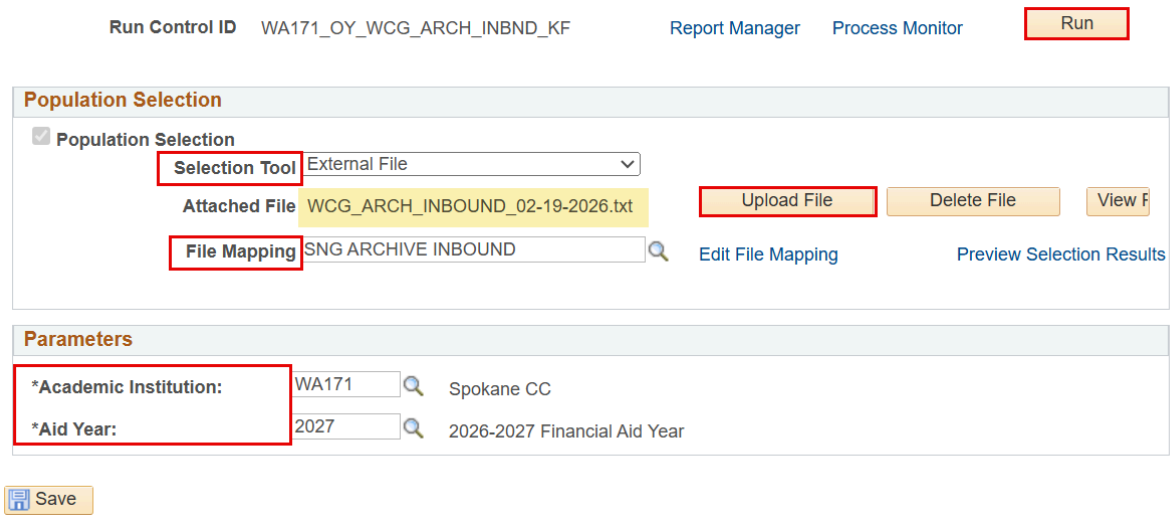
WCG Archive Inbound Process

Navigation	Description
Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Archive Import	Processes data provided in the file from WSAC, inserting a new row on the WCG Archive page with the information. It will also update the WCG eligibility page.

This process is the follow up step to the previous process.

Enter a New or Existing Run Control ID

- **Choose 'External File' from the Selection Tool dropdown**
- **Select Upload File**
- **A browser window will open**
- **Locate file saved from WSAC WCG Archive Eligibility Checker (Once selected the name of the file will populate in the Attached File field.)**
- **Select 'View File' Button to view data**
- **Populate File Mapping field with SNG ARCHIVE INBOUND**
- **Under Parameters populate Academic Institution and Aid Year**
- **Select Preview Selection Results to verify records are being selected**
- **Select Run**



College Bound Scholarship

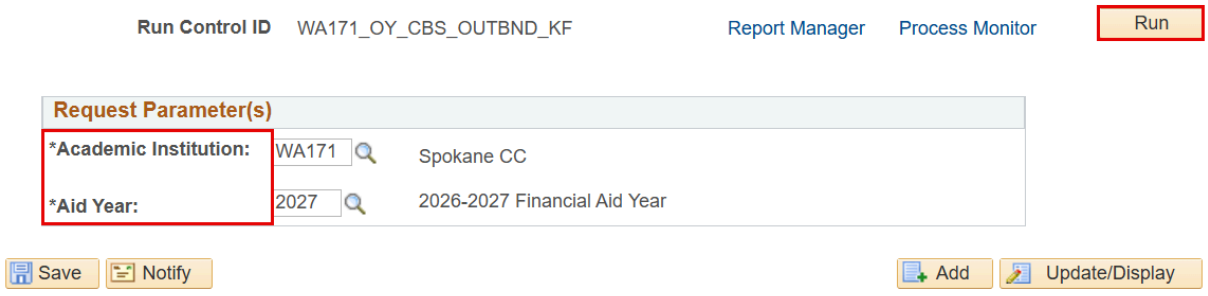
Outbound Process

Navigation	Description
CTC Custom > CTC Interfaces > College Bound Scholarship > College Bound Outbound Process	**Pulls all SSNs for students that are eligible for Washington College Grant and creates a file to upload to the WSAC eligibility checker to collect CBS eligibility data**

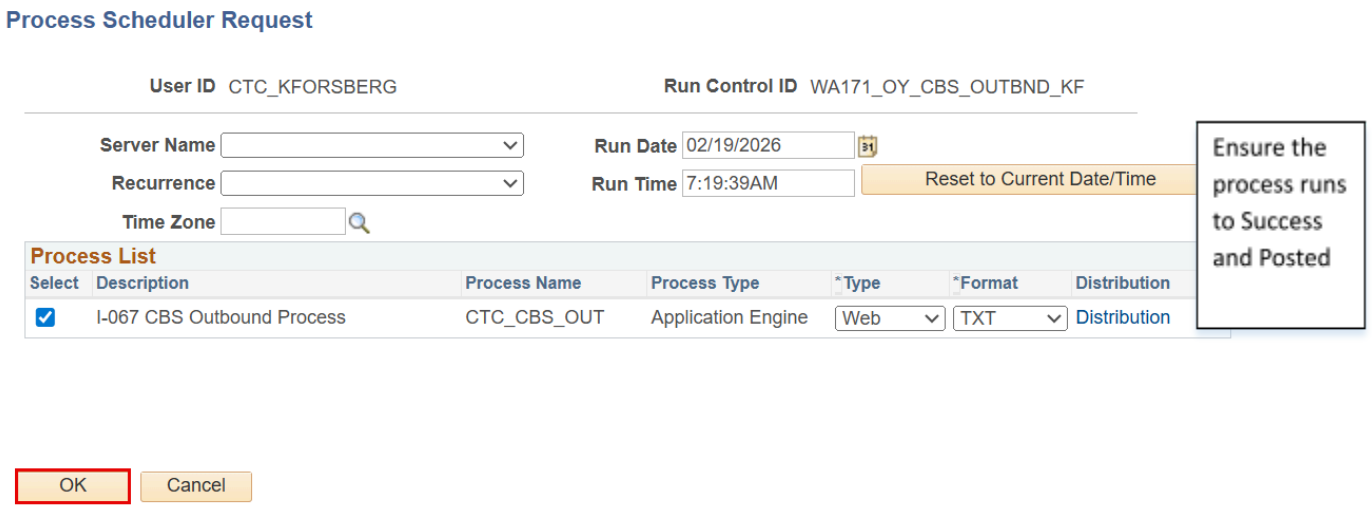
This process is NOT part of your nightly ISIR JobSet and will need to be run before aid offers are published.

Enter a New or Existing Run Control ID

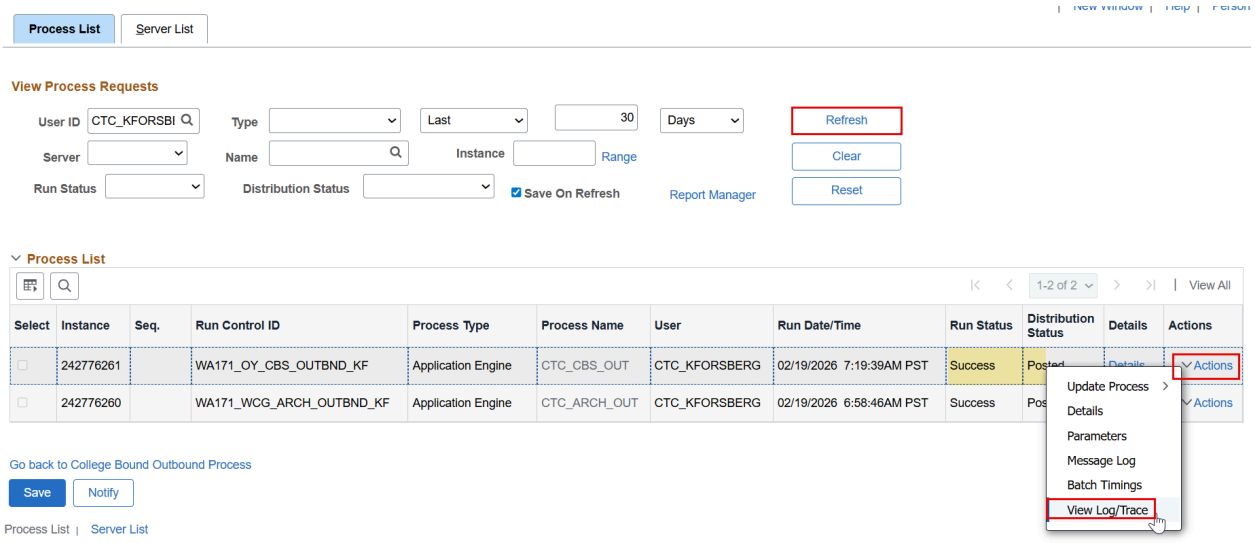
- **Enter Academic Institution**
- **Enter Aid Year**
- **Select Run**



From the Process Scheduler Request page ensure the I-067 checkbox is selected and select OK



From the Process Monitor page select the Actions link and then select the View Log/Trace option



From the View Log/Trace page select on the CBSOutbound_20xx.txt link

View Log/Trace

Report

Report ID	22037292	**Process Instance**	242776261	Message Log
Name	CTC_CBS_OUT	**Process Type**	Application Engine	
Run Status	Success			

I-067 CBS Outbound Process

Distribution Details

Distribution Node	local	**Expiration Date**	03/21/2026

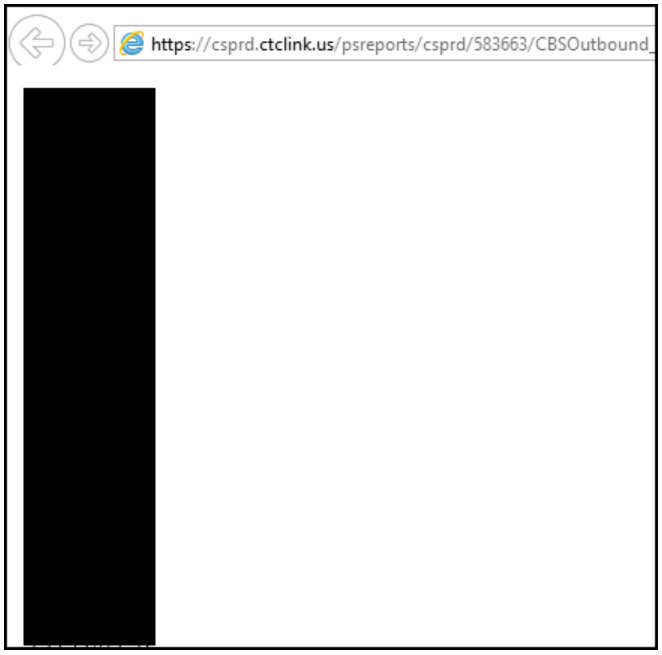
File List

Name	File Size (bytes)	Datetime Created
CBS_OutBound_Log_242776261.log	971	02/19/2026 7:21:55.178773AM PST
AE_CTC_CBS_OUT_242776261.log	203	02/19/2026 7:21:55.178773AM PST
CBSOutbound_2027.txt	48,340	02/19/2026 7:21:55.178773AM PST

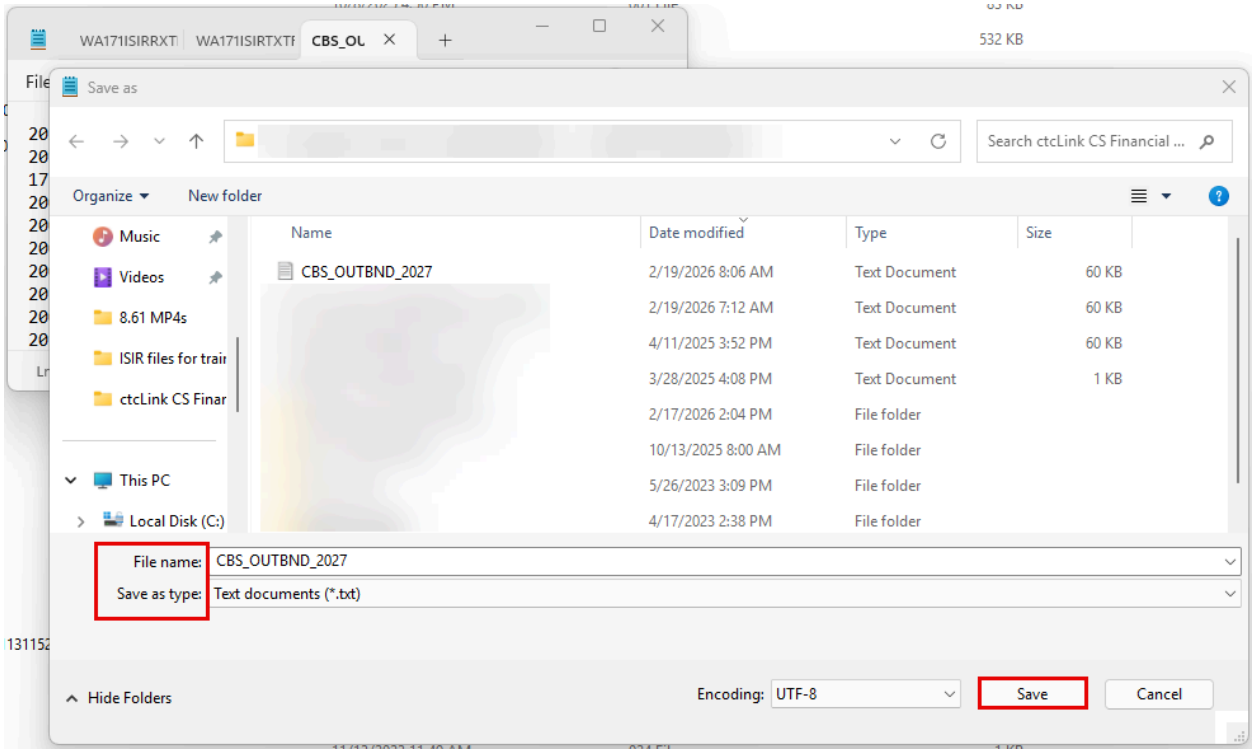
Distribute To

Distribution ID Type	*Distribution ID
User	CTC_KFORSBERG

Return



- A list of Social Security numbers will appear. Copy and paste list into Notepad or Word and save as a .txt file
- Save the newly created file to your computer.
- File is now ready for the WSAC eligibility checker process.



Instructions for using the WSAC Portal can be found at the WSAC resources site.

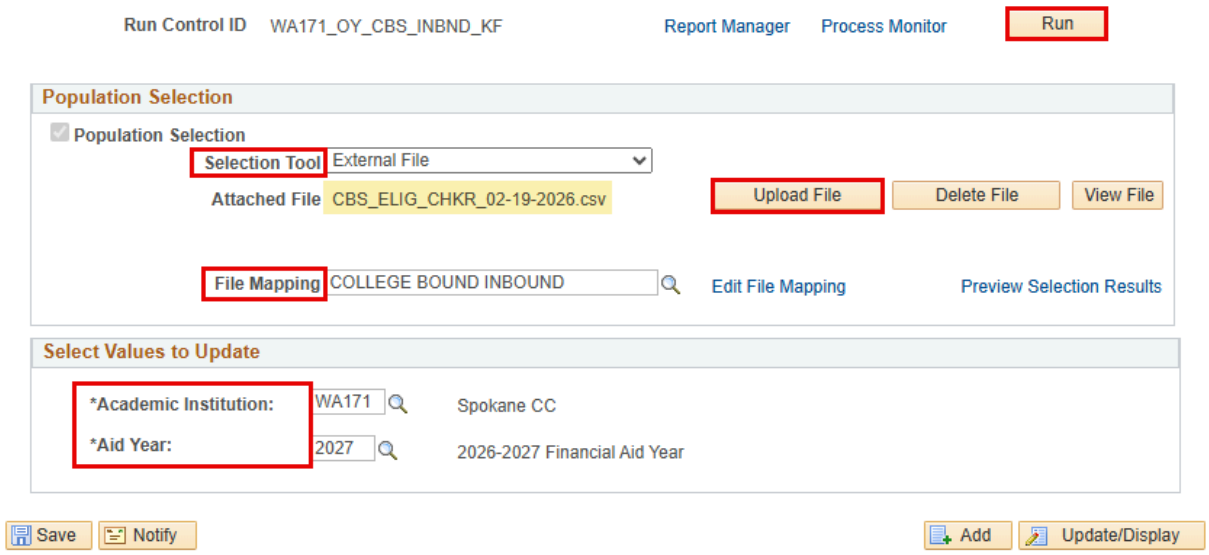
http://www.wsac.wa.gov/FAA-resources

Inbound Process

Navigation	Description
Financial Aid > CTC Custom > CTC Interfaces > College Bound Scholarship > College Bound Inbound Process	Processes data returned in the file received from the WSAC eligibility checker, inserting a new row on the CBS Eligibility Data page with the exact information received in the file.

Enter a New or Existing Run Control ID

- Select External File from the Selection Tool
- Select Upload File
- Select Choose File and choose the appropriate file and select Upload
- Select File Mapping value 'College Bound Inbound'
- Enter Academic Institution and Aid Year
- Select Preview Selection to see student results (take note of a student ID to validate)
- Select Run

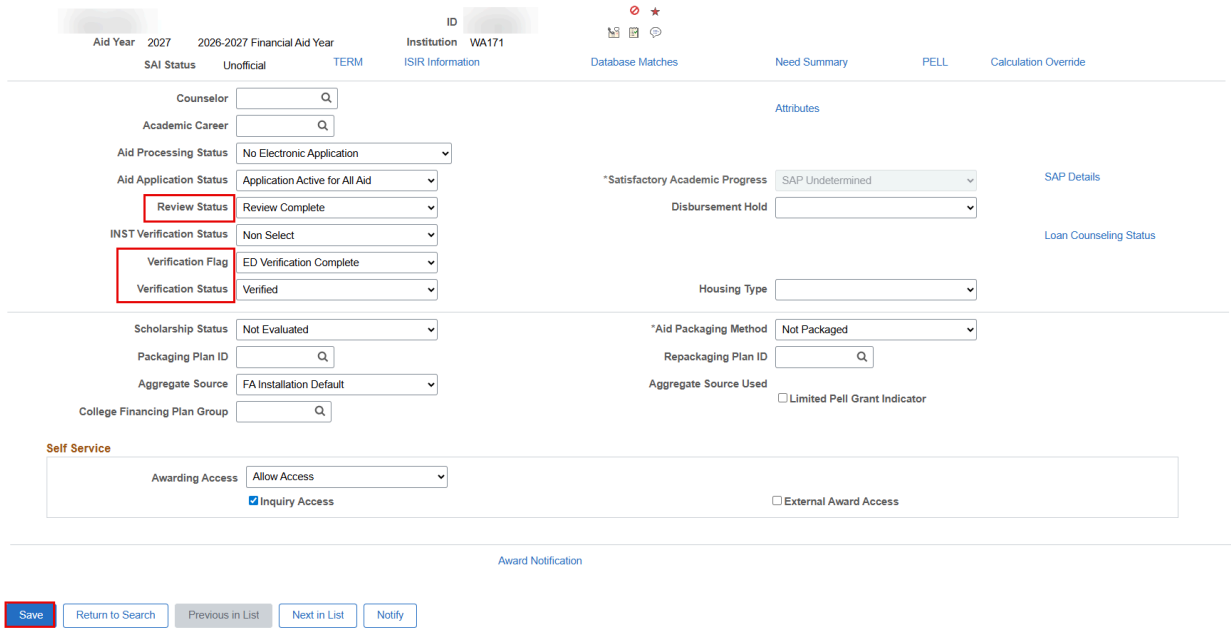


Verification

Setting the Verification Flag

Navigation	Description
Financial Aid > View Packaging Status Summary	Set the verification flags to allow students selected for federal verification to be selected for packaging

1. Verification Flag row = "ED Verification Complete".
2. Verification Status row = "Verified".
3. If the file review is now completed, Review Status = "Review Complete"
4. Select the Save button.

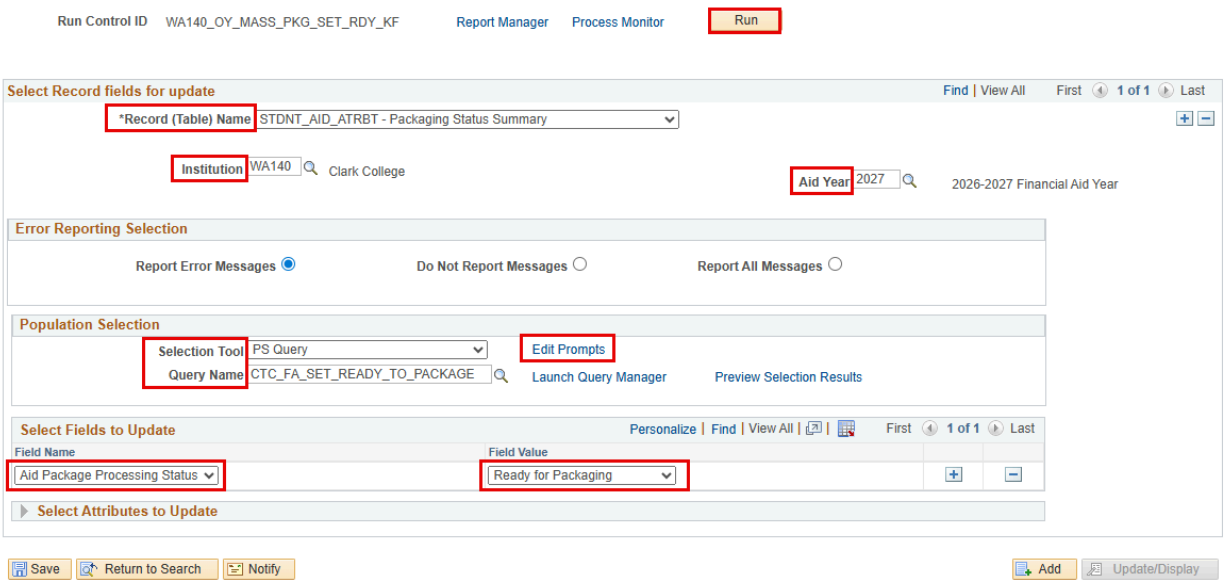


Mass Packaging

Setting Ready to Package

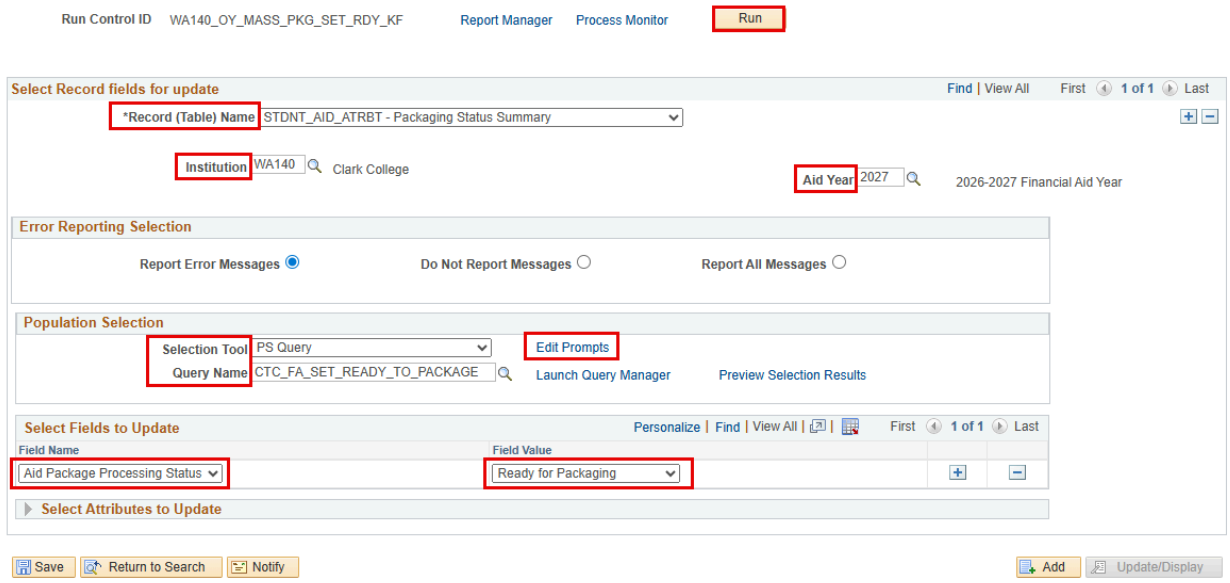
Navigation	Description
Set up SACR > System Administration > Utilities > Population Update > Population Update Process	Set parameters for running the Population Update process

1. Enter New or use existing Run Control ID
2. Choose STDNT_AID_ATRBT from the *Record (Table) Name dropdown menu
3. Enter Institution and Aid Year
4. Keep 'Report Error Messages' radio button selected
5. Choose PS Query from the Selection Tool dropdown menu
6. Use the look up tool to locate the CTC_FA_SET_READY_TO_PACKAGE query – (NOTE: the query pulls students who have an "Aid Processing Status" of *Applied* and a "Review Status" of Review *Complete* on the View Packaging Status Summary page)
7. Select Edit Prompts and enter the Academic Institution and Aid Year
8. Under Select Fields to Update populate the fields with the following information:
    a. Field Name = Aid Package Processing Status
    b. Field Value = Ready for Packaging
9. Select RUN



From the Process Scheduler Request select the SCC_POP_UPD box.

Select OK

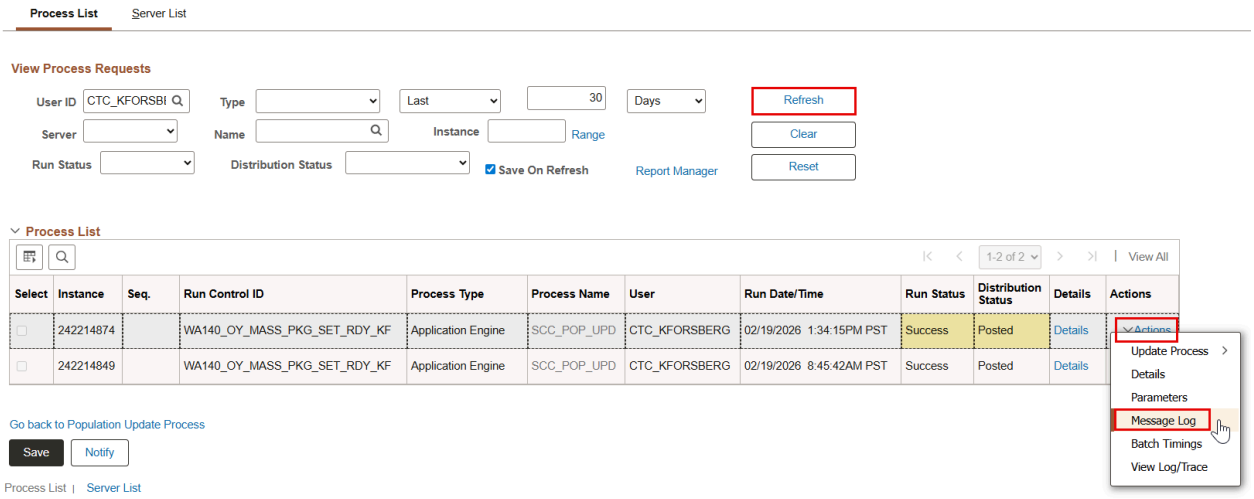


You will be directed back to the Population Update Process page

Select the Process Monitor link to ensure the process runs to Success and Posted



Select the Actions link and then select the Message Log option



Review the number of records updated

Message Log

Process

Instance: 242214874 **Type:** Application Engine

Name: SCC_POP_UPD **Description:**

1-9 of 9 | View All

Severity	Log Time	Message Text	Explain
10	1:34:57PM	'SCC_POP_UPD' started at 2026-02-19-13.34.56.000000	Explain
10	1:34:57PM	Processing record STDNT_AID_ATRBT.	Explain
10	1:34:57PM	Total number of records read : 13	Explain
10	1:34:57PM	Total number of records updated successfully : 13	Explain
10	1:34:57PM	Total number of records failed : 0	Explain
10	1:34:57PM	'SCC_POP_UPD' ended at 2026-02-19-13.34.56.000000	Explain
	1:35:11PM	Published message with ID dee808dc-0dda-11f1-8dda-bfde7181b242 to create entry in folder GENERAL.	Explain
	1:35:11PM	Successfully posted generated files to the report repository	Explain

Return

Student Selection – Step 1

Navigation	Description
Financial Aid > Awards > Mass Packaging > Select Students	Select groups of students for packaging based on specific selection criteria.

When selecting a population of students for mass packaging institutions will have three processing options:

CTC_FA_MASS_PACKAGE_SELECT_01 (By FPS Process Date or Current Date)

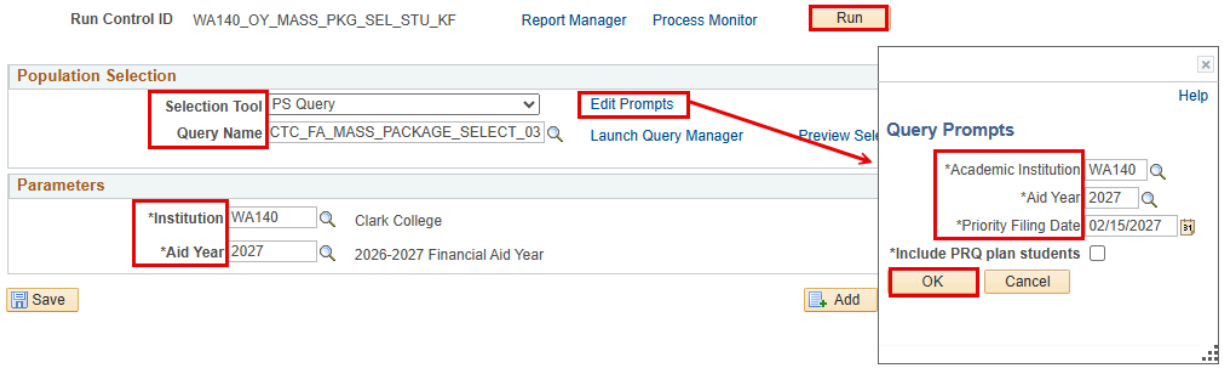
CTC_FA_MASS_PACKAGE_SELECT_02 (By last completed required checklist)

CTC_FA_MASS_PACKAGE_SELECT_03 (By FPS Process Date or Current Date with a SAP Status of anything but "N")

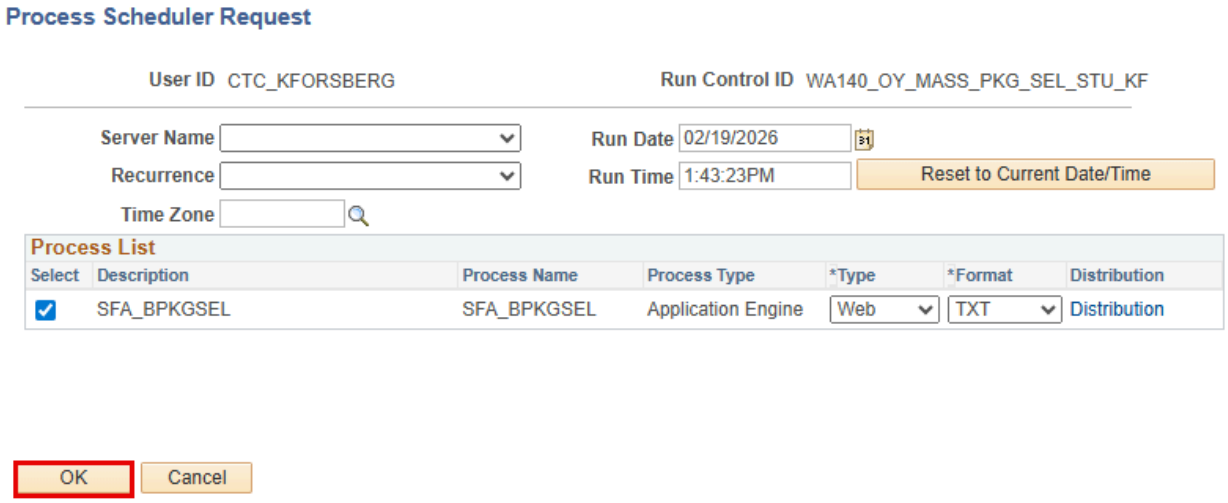
Remember existing Run Control IDs used will have previously selected processing option.

From the Mass Packaging Select page:

1. **Enter New or use existing Run Control ID**
2. **Choose PS Query from the Selection Tool dropdown menu**
3. **Use the look up tool next to the Query Name field to located the desired query noted above**
4. **Select Edit Prompts (*Note – Edit Prompts Fields will vary depending on query chosen)**
5. **Enter Edit Prompts and select OK**
6. **Select Preview Selection Results to verify records are being selected**
7. **Select Run**

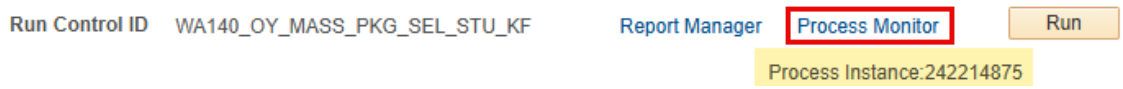


From the Process Scheduler page select the SFA_BPKGEL box and select OK

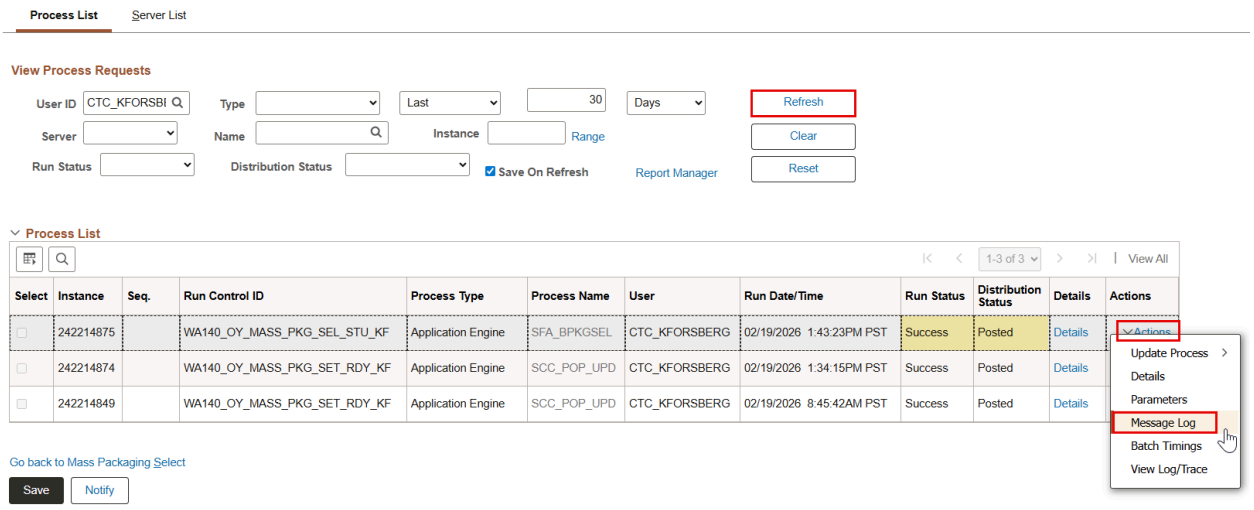


You will be directed to the Select Students page

Select the Process Monitor link and ensure the process runs to Success and Posted



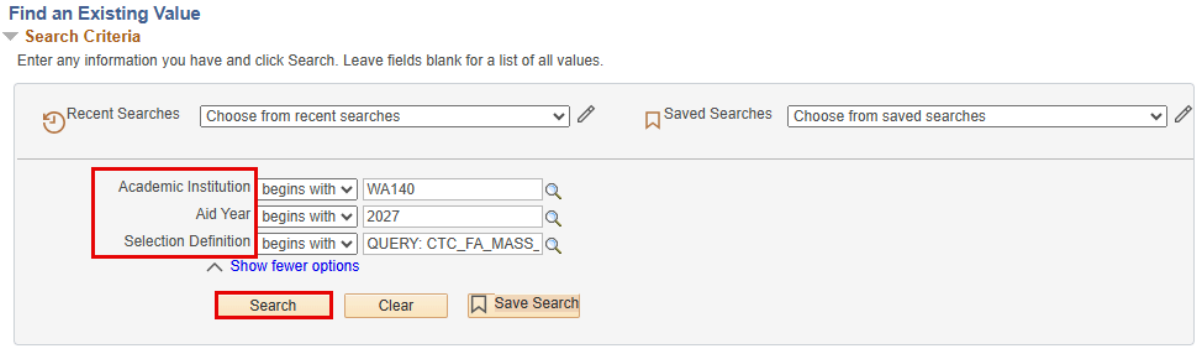
Select the Actions link and select the Message Log option to review the number of records processed

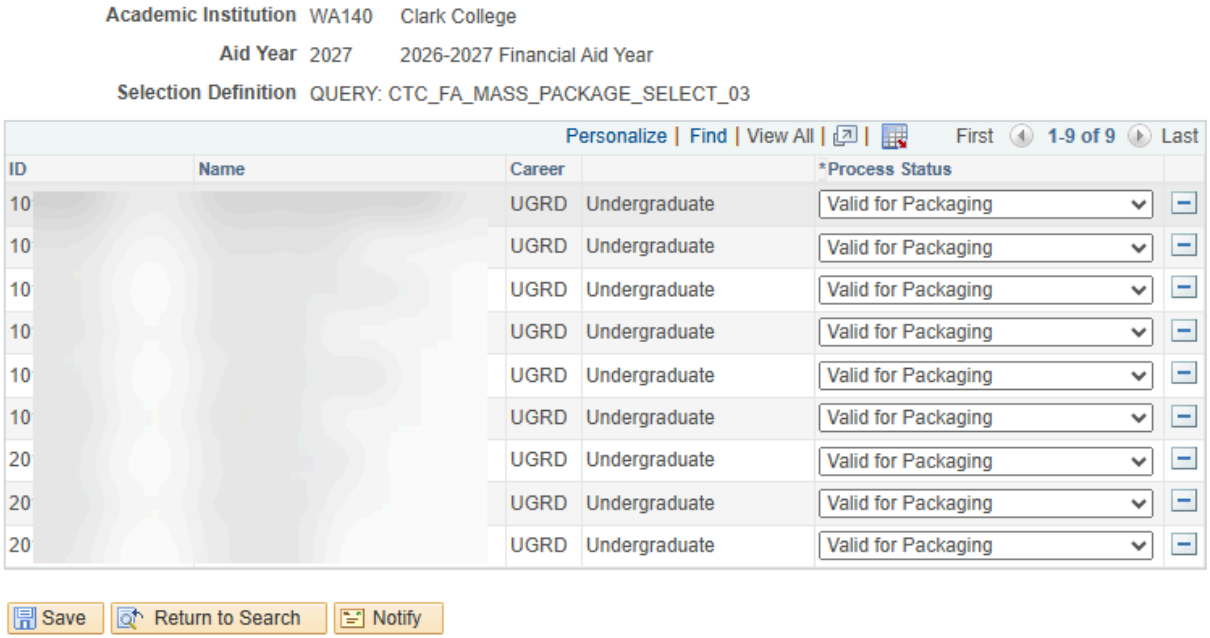


View Student Selection Results – Step 1

Navigation	Description
Financial Aid > Awards > Mass Packaging > View Results by Students	Review students selected from previous process

1. Enter Academic Institution and Aid Year
2. Enter Select Definition Query: (Depending on which query was used to select students for mass packaging)
   a. QUERY: CTC_FA_MASS_PACKAGE_SELECT_01
   b. QUERY: CTC_FA_MASS_PACKAGE_SELECT_02
   c. QUERY: CTC_FA_MASS_PACKAGE_SELECT_03
3. Select Search to view list of students

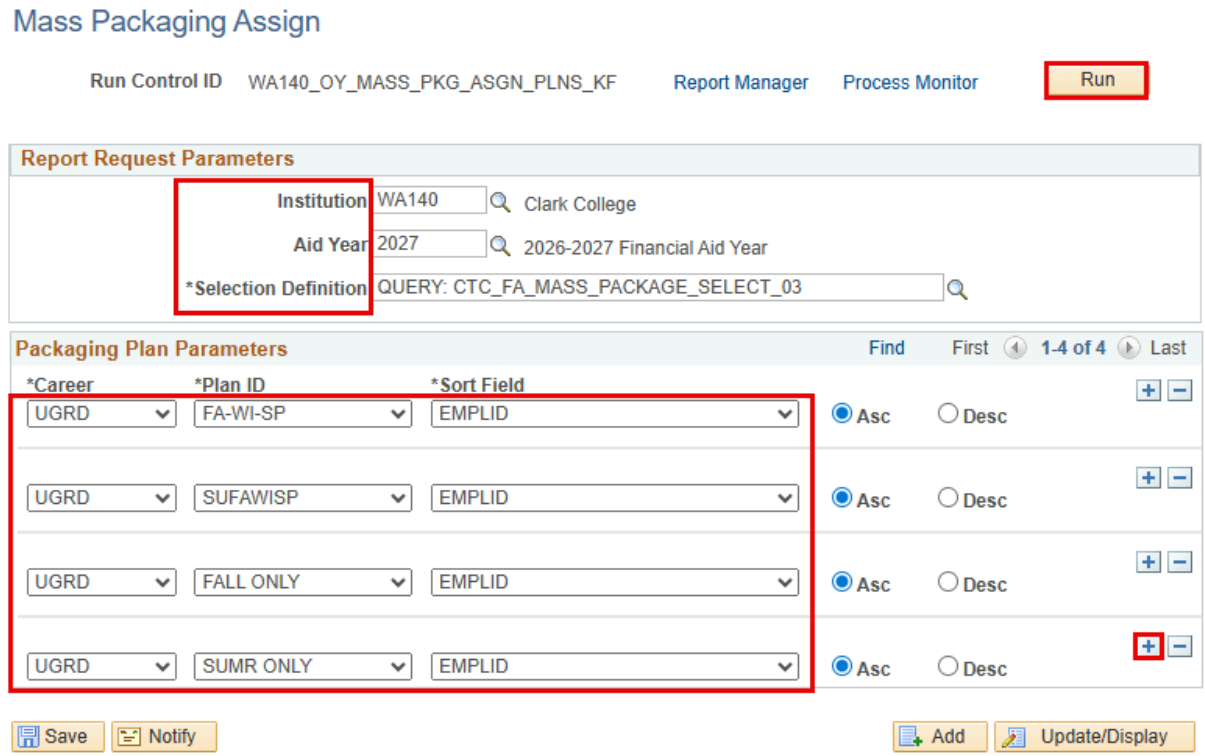




Assign Packaging Plans – Step 2

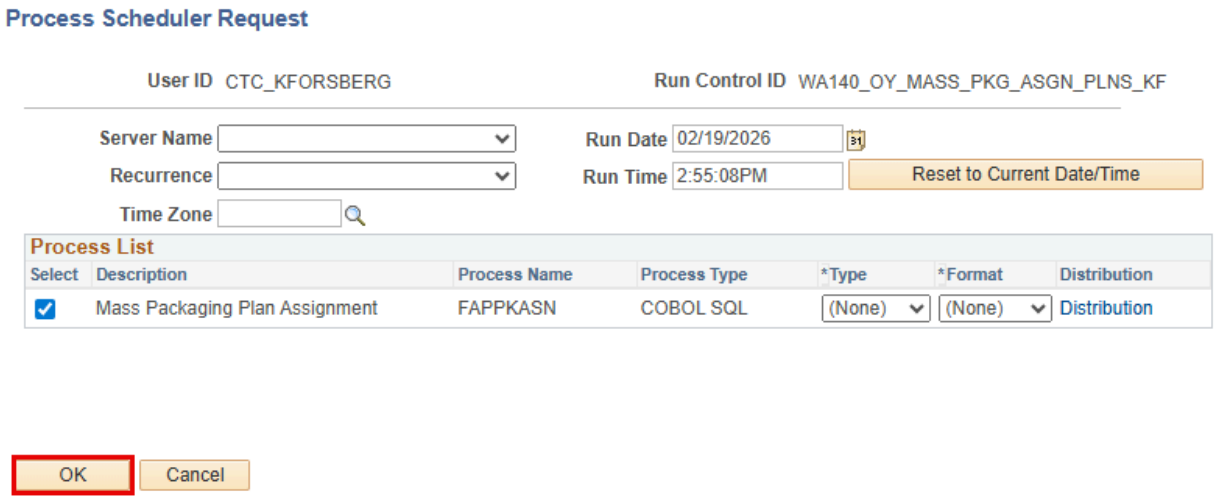
Navigation	Description
Financial Aid > Awards > Mass Packaging > Assign Plans	Assigning packaging plans to selected students.

1. Enter New or use existing Run Control ID
2. Enter Institution and Aid Year
3. Enter Select Definition Query: (depending on which query was used to select students for mass packaging)
    a. QUERY: CTC_FA_MASS_PACKAGE_SELECT_01
    b. QUERY: CTC_FA_MASS_PACKAGE_SELECT_02
    c. QUERY: CTC_FA_MASS_PACKAGE_SELECT_03
4. Enter Career = UGRD
5. Enter Plan ID
6. Select Sort Field option
7. Select 'Asc' (Ascending) or 'Desc' (Descending) order
8. To include multiple Plan IDs into the same process, select the (+) symbol to add a new row
9. Select Run



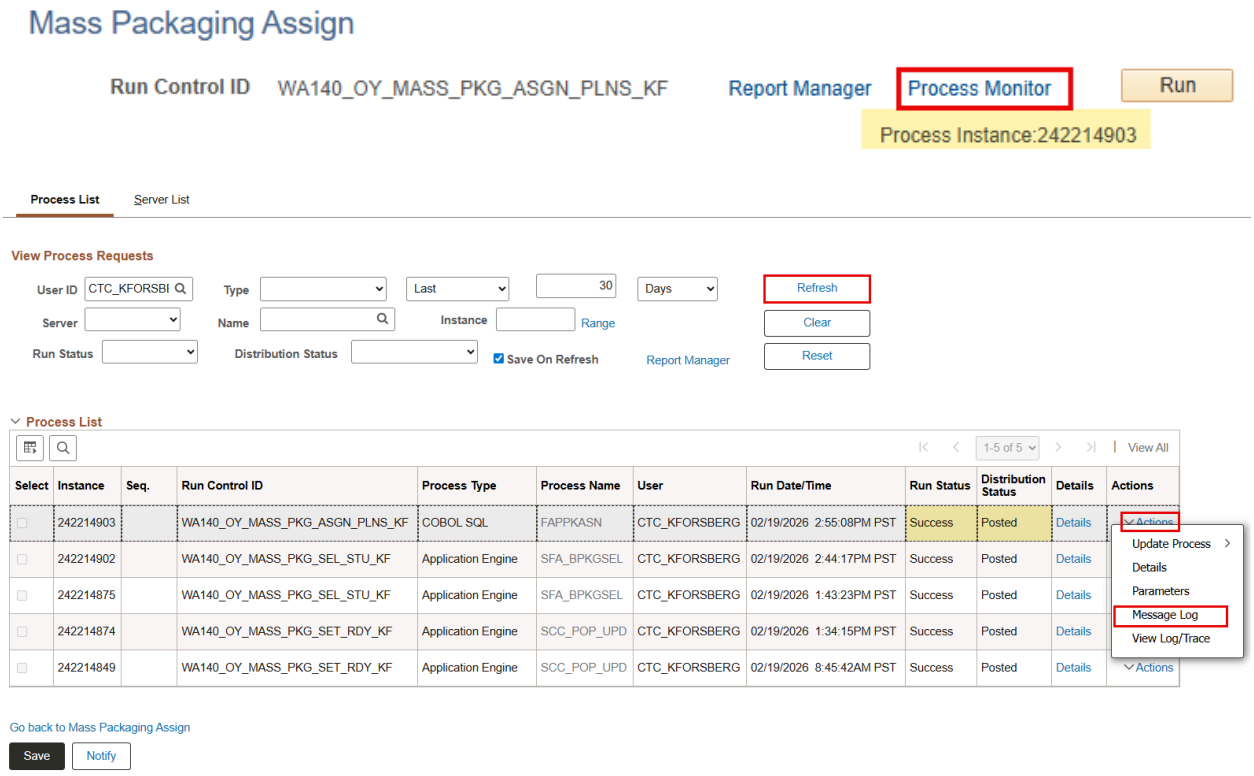
From the Process Scheduler page select the Mass Packaging Plan Assignment box

Select OK



You will be directed back to the Assign Plans page

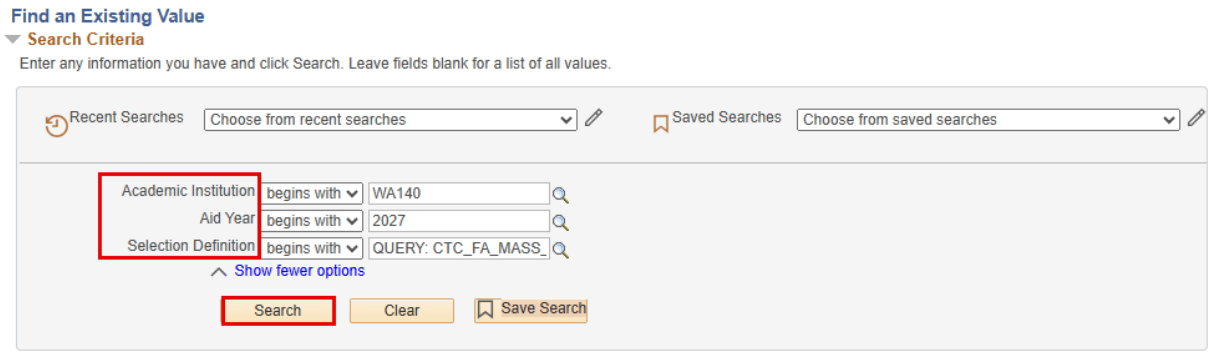
Select the Process Monitor link and ensure the process runs to Success and Posted. You can select the Actions link and the Message Log option to review what processed.



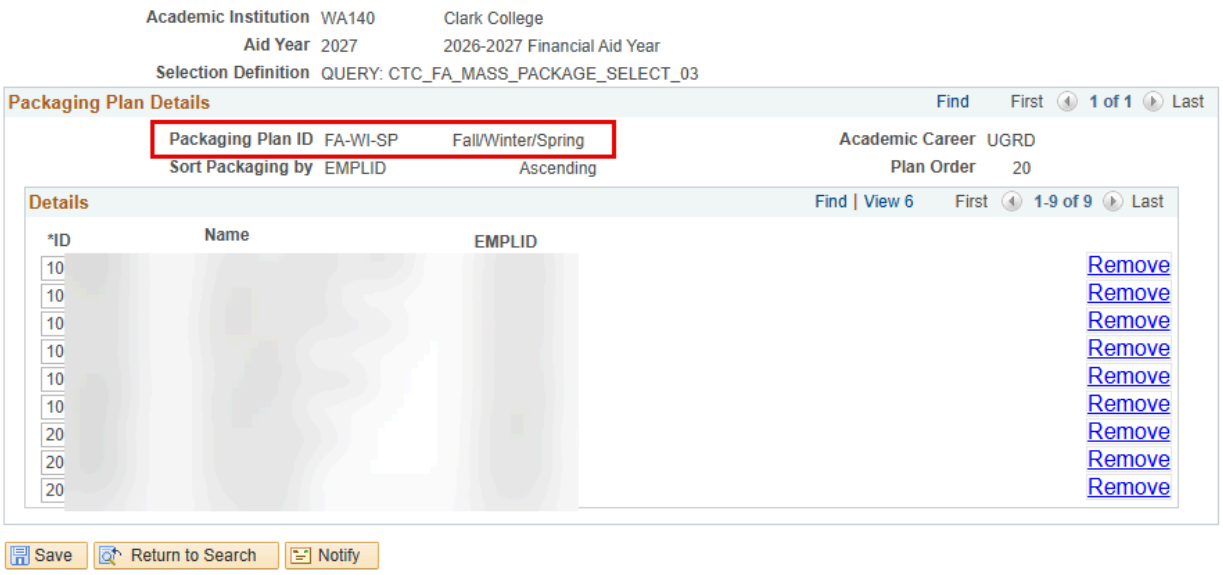
View Results of Plan Assignment – Step 2

Navigation	Description
Financial Aid > Awards > Mass Packaging > View Results by Query	Review the packaging plans assigned to students

1. **Enter Institution and Aid Year**
2. **Enter Select Definition Query: (depending on which query was used to select students for mass packaging)**
    a. **QUERY: CTC_FA_MASS_PACKAGE_SELECT_01**
    b. **QUERY: CTC_FA_MASS_PACKAGE_SELECT_02**
    c. **QUERY: CTC_FA_MASS_PACKAGE_SELECT_03**
3. **Select Search to view results**



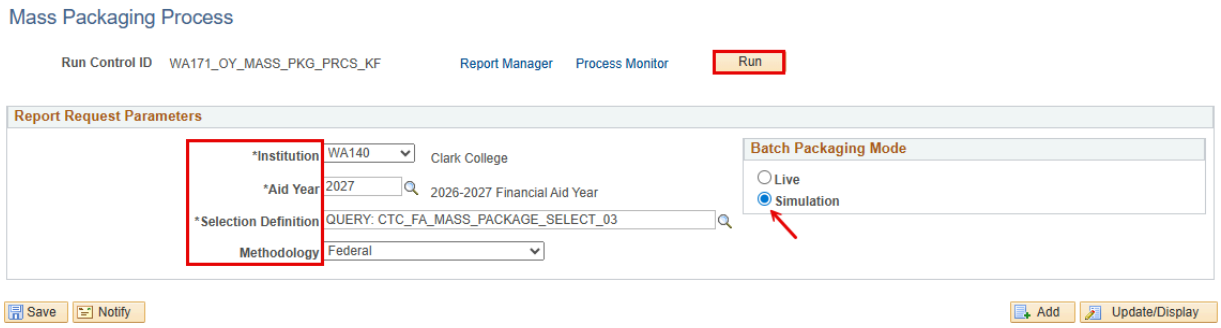
A list of the students will appear for each Packaging Plan ID selected during the Assign Plans process.


Academic Institution WA140 Clark College
Aid Year 2027 2026-2027 Financial Aid Year
Selection Definition QUERY: CTC_FA_MASS_PACKAGE_SELECT_03
Packaging Plan Details
Find First 1 of 1 Last
Packaging Plan ID FA-WI-SP Fall/Winter/Spring
Sort Packaging by EMPLID Ascending
Academic Career UGRD
Plan Order 20
Details
Find | View 6 First 1-9 of 9 Last
*ID
Name
EMPLID
10
10
10
10
10
10
20
20
20
Remove
Remove
Remove
Remove
Remove
Remove
Remove
Remove
Remove
Save
Return to Search
Notify

Process Awards from Assigned Plans – Step 3

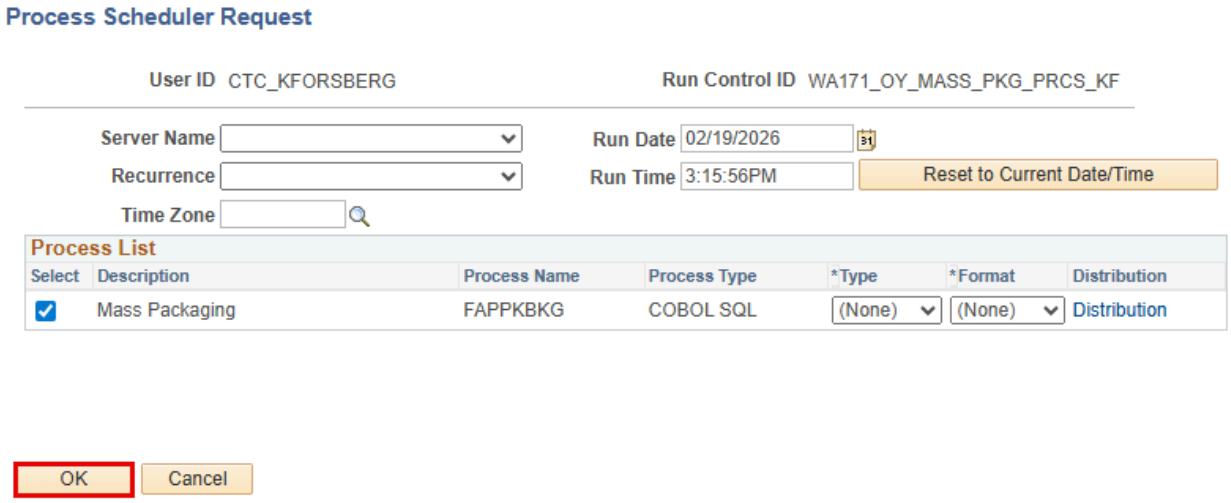
Navigation	Description
Financial Aid > Awards > Mass Packaging > Process Mass Packaging	Select the Mass Packaging Selection Definition that you are using to select your students for the current Mass Packaging run.

1. Enter New or use existing Run Control ID
2. Enter Institution and Aid Year
3. Enter Select Definition Query: (depending on which query was used to select students for mass packaging)
    a. QUERY: CTC_FA_MASS_PACKAGE_SELECT_01
    b. QUERY: CTC_FA_MASS_PACKAGE_SELECT_02
    c. QUERY: CTC_FA_MASS_PACKAGE_SELECT_03
4. Select LIVE for final packaging assignment
5. Select Simulation for preliminary/simulate assignment
6. Select Run



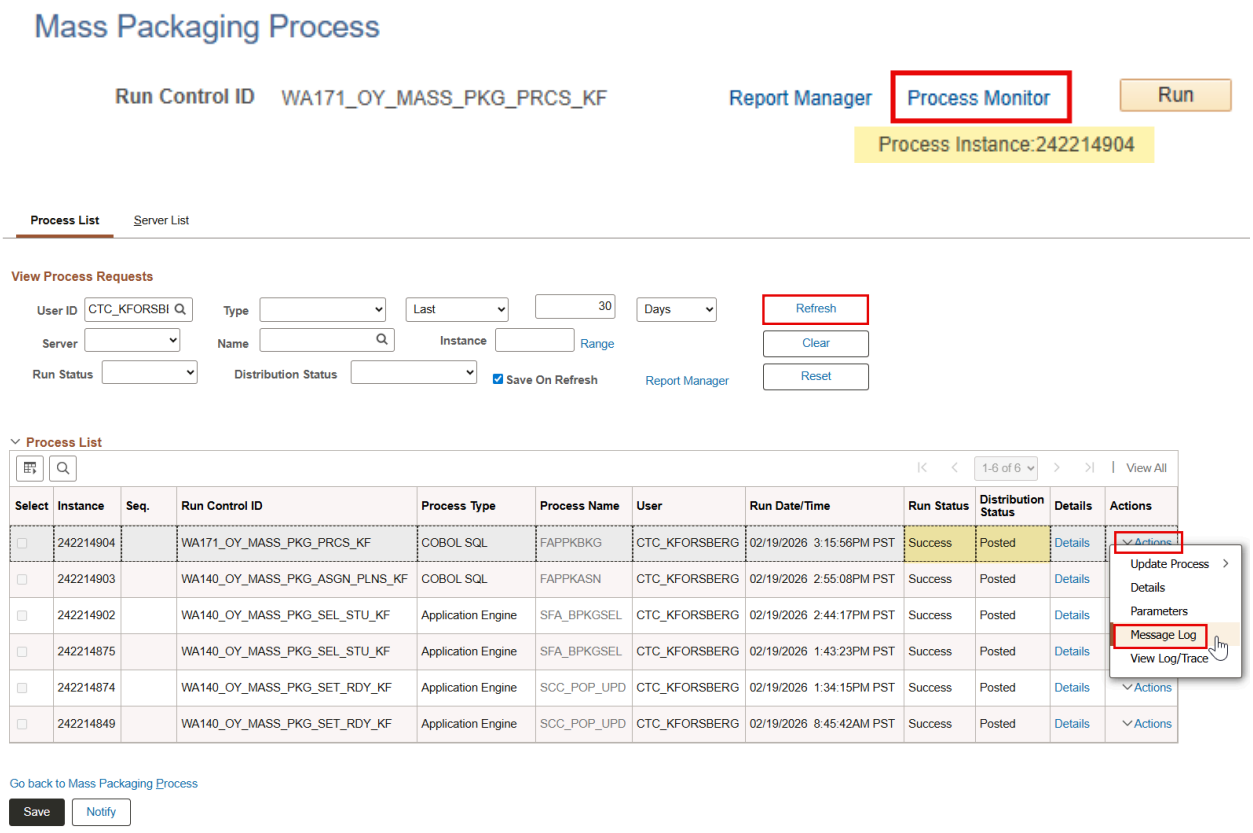
From the Process Scheduler page select the Mass Packaging box.

Select OK



You will be directed back to the Process Mass Packaging page

Select the Process Monitor link and ensure the process runs to Success and Posted

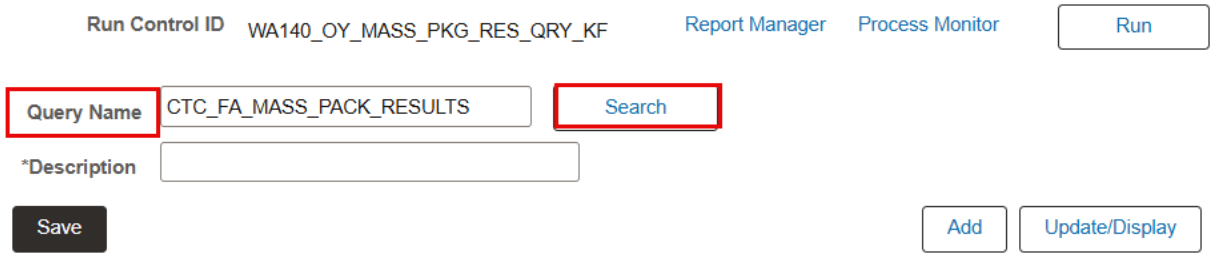


Mass Packaging Results – (Latest Batch)

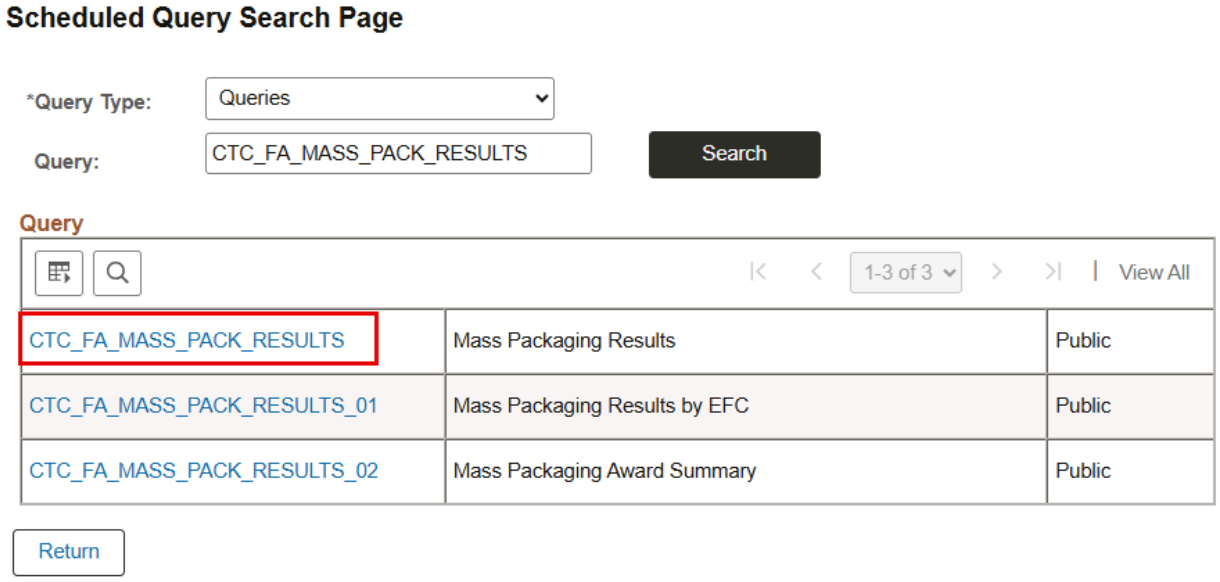
This query pulls the most current list of students who were mass packaged

Navigation	Description
Reporting Tools > Query > Schedule Queries	Viewing the packaging batch details.

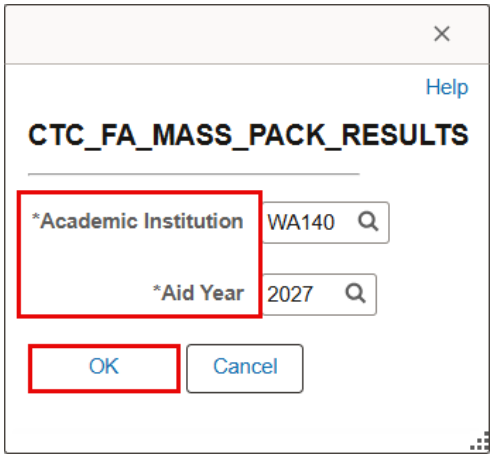
1. **Enter New or use existing Run Control ID**
2. **Enter CTC_FA_MASS_PACK_RESULTS into the Query Name field**
3. **Select Search**



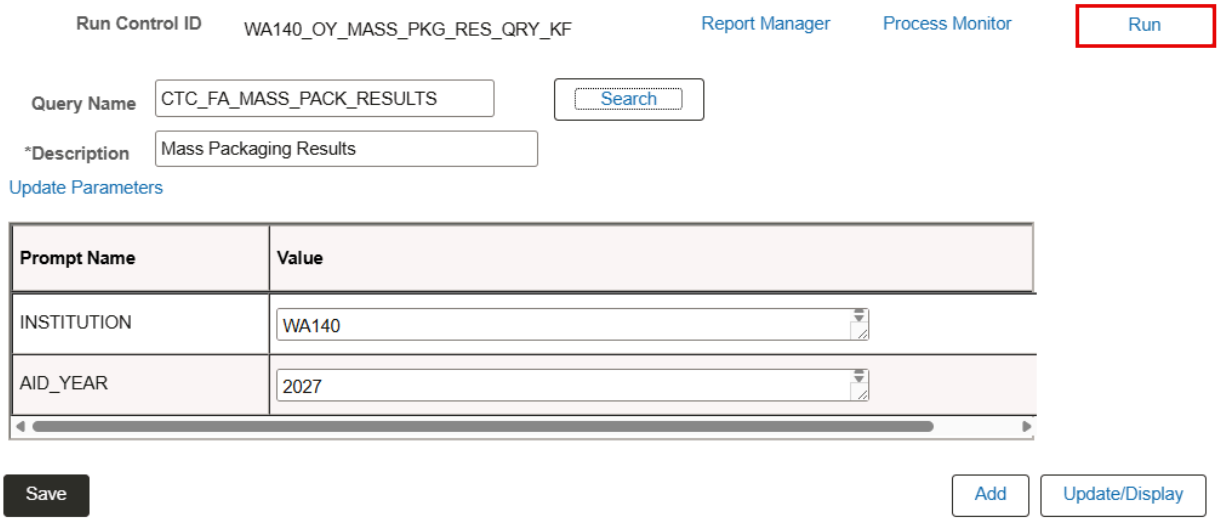
4. **Select the desired Query**



5. **Enter the Edit Prompts and select OK**

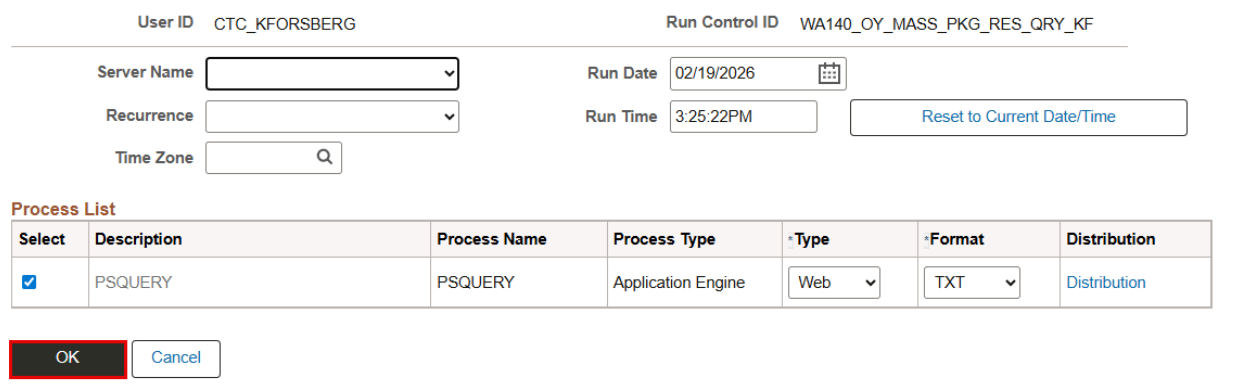


6. **From the Schedule Queries page select Run**



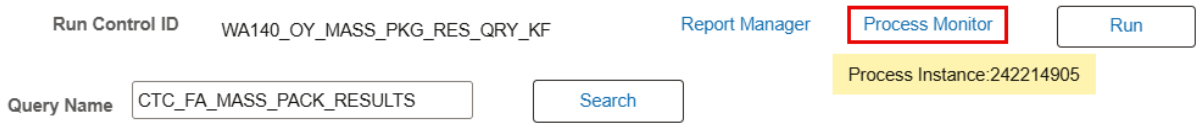
From the Process Scheduler Request page select OK button

Process Scheduler Request

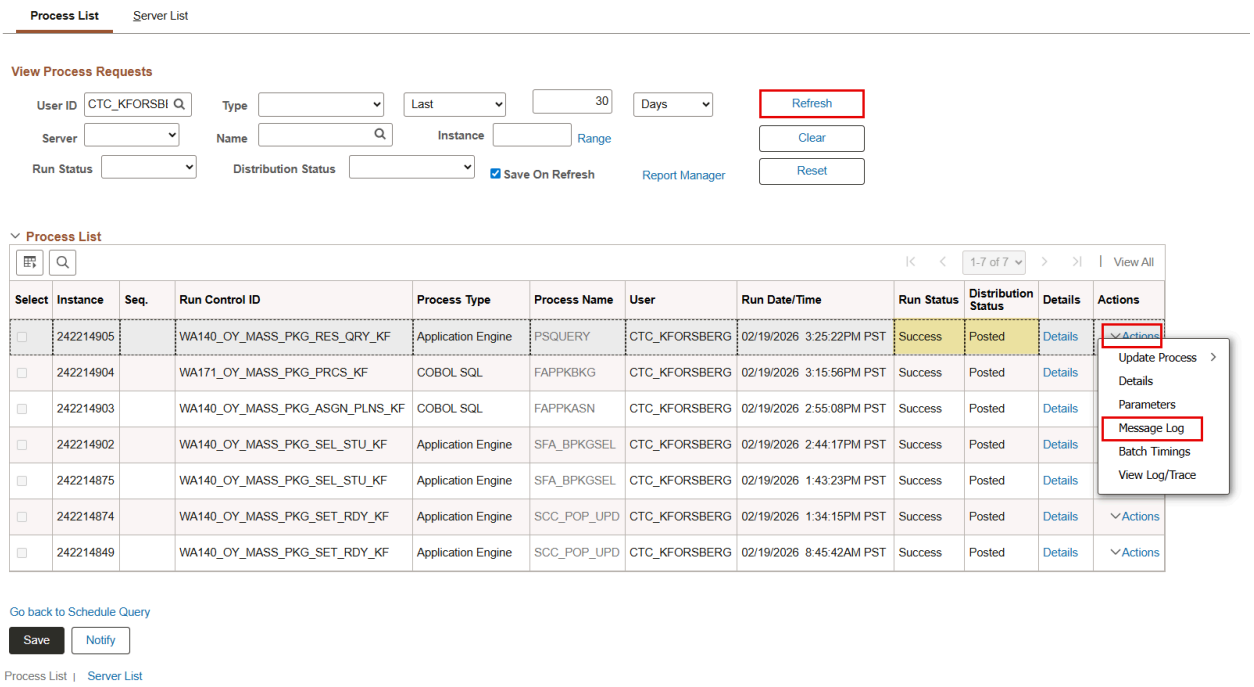


You will be directed back to the Schedule Queries page

Select the Process Monitor link and ensure the process runs to Success and Posted



Select the Actions link from the Process Monitor page and select the View Log/Trace option



Select the CTC_FA_MASS_PACK_RESULTS-xxxxxx.csv link to open results

View Log/Trace

Report

Report ID	21989588	**Process Instance**	242214905	Message Log
Name	PSQUERY	**Process Type**	Application Engine	
Run Status	Success			

Mass Packaging Results

Distribution Details

Distribution Node	local	**Expiration Date**	03/21/2026

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_242214905.log	166	02/19/2026 3:26:56.531947PM PST
CTC_FA_MASS_PACK_RESULTS-242214905.csv	48,820	02/19/2026 3:26:56.531947PM PST

Distribute To

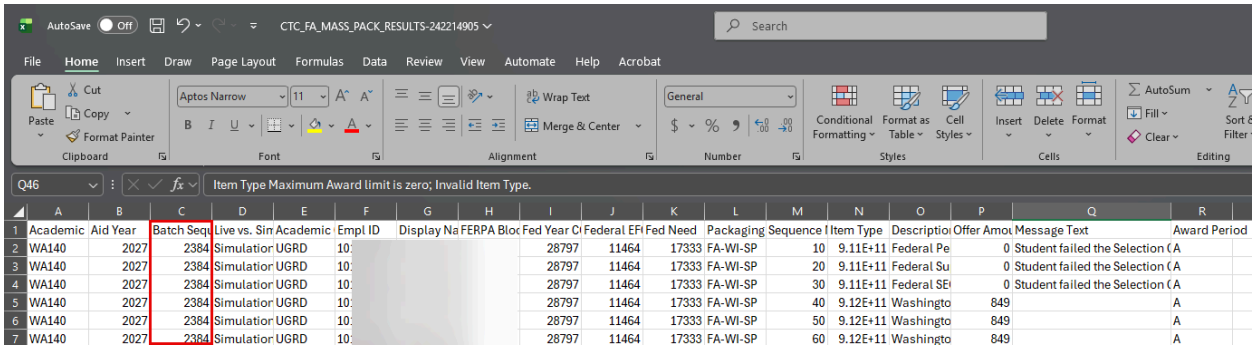
Distribution ID Type	*Distribution ID
User	CTC_KFORSBERG

Return

A dialogue box will open depending on browser, select OK or OPEN to view results

Allow the file to open into an Excel spreadsheet

(*Note – the Batch Sequence number for next step)

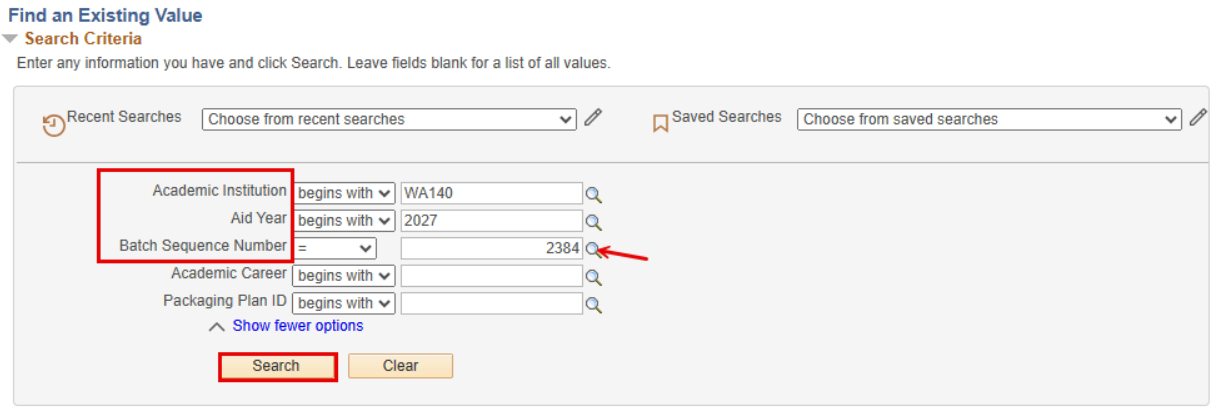


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Academic	Aid Year	Batch Sequ	Live vs. Sin	Academic	Empl ID	Display Na	FERPA Bloc	Fed Year Cl	Federal EFI	Fed Need	Packaging	Sequence I	Item Type	Descriptio	Offer Amou	Message Text	Award Period
2	WA140	2027	2384	Simulatior	UGRD	10			28797	11464	17333	FA-WI-SP	10	9.11E+11	Federal Pe	0	Student failed the Selection (	A
3	WA140	2027	2384	Simulatior	UGRD	10			28797	11464	17333	FA-WI-SP	20	9.11E+11	Federal Su	0	Student failed the Selection (	A
4	WA140	2027	2384	Simulatior	UGRD	10			28797	11464	17333	FA-WI-SP	30	9.11E+11	Federal SE	0	Student failed the Selection (	A
5	WA140	2027	2384	Simulatior	UGRD	10			28797	11464	17333	FA-WI-SP	40	9.12E+11	Washingto	849		A
6	WA140	2027	2384	Simulatior	UGRD	10			28797	11464	17333	FA-WI-SP	50	9.12E+11	Washingto	849		A
7	WA140	2027	2384	Simulatior	UGRD	10			28797	11464	17333	FA-WI-SP	60	9.12E+11	Washingto	849		A

View Mass Packaging Details

Navigation	Description
Financial Aid > Awards > Mass Packaging > View Mass Packaging Details	View mass packaging results by batch sequence number

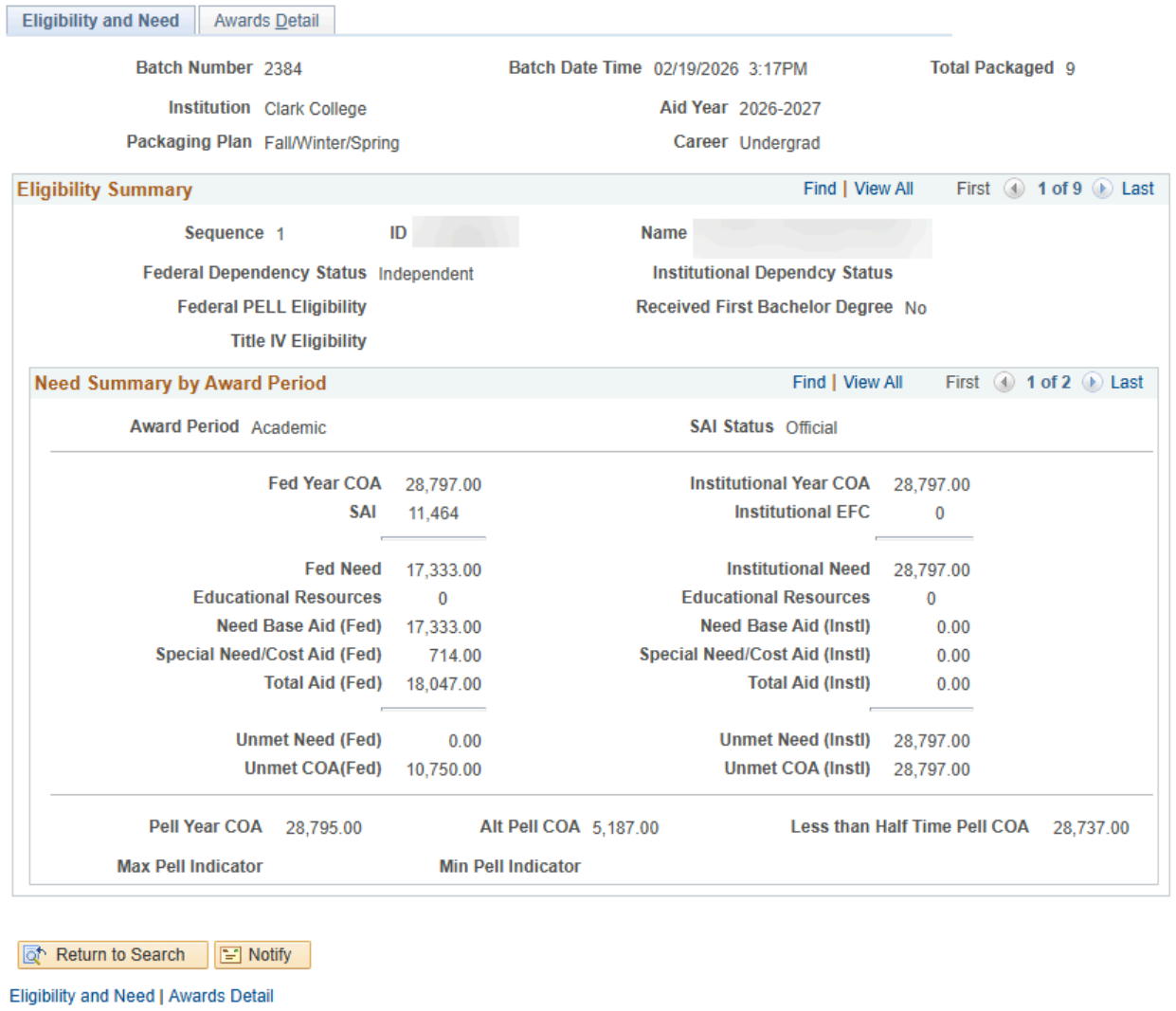
Enter the Batch Sequence noted in the report into the Batch Sequence Number field, then select Search



This will be a "Per Plan" view of the packaging that occurred for the indicated sequence number.

Choose the desired plan to review.

Review students' packages – Eligibility and Need on tab



Eligibility and Need | Awards Detail

Batch Number 2384 Batch Date Time 02/19/2026 3:17PM Total Packaged 9

Institution Clark College Aid Year 2026-2027

Packaging Plan Fall/Winter/Spring Career Undergrad

Eligibility Summary Find | View All First 1 of 9 Last

Sequence 1 ID [redacted] Name [redacted]

Federal Dependency Status Independent Institutional Dependcy Status

Federal PELL Eligibility Received First Bachelor Degree No

Title IV Eligibility

Need Summary by Award Period Find | View All First 1 of 2 Last

Award Period Academic SAI Status Official

Fed Year COA	28,797.00	Institutional Year COA	28,797.00
SAI	11,464	Institutional EFC	0
Fed Need	17,333.00	Institutional Need	28,797.00
Educational Resources	0	Educational Resources	0
Need Base Aid (Fed)	17,333.00	Need Base Aid (Instl)	0.00
Special Need/Cost Aid (Fed)	714.00	Special Need/Cost Aid (Instl)	0.00
Total Aid (Fed)	18,047.00	Total Aid (Instl)	0.00
Unmet Need (Fed)	0.00	Unmet Need (Instl)	28,797.00
Unmet COA(Fed)	10,750.00	Unmet COA (Instl)	28,797.00

Pell Year COA 28,795.00 Alt Pell COA 5,187.00 Less than Half Time Pell COA 28,737.00

Max Pell Indicator Min Pell Indicator

Return to Search Notify

Eligibility and Need | Awards Detail

Review students' package – Awards Detail on tab 2

Eligibility and Need | Awards Detail

Batch Number 2384 Batch Date Time 02/19/2026 3:17PM Total Packaged 9

Institution Clark College Aid Year 2026-2027

Packaging Plan Fall/Winter/Spring Career Undergrad

Find | View All First 1 of 9 L

Student Packaging Sequence 1 ID

Personalize | | 1-24 of 24

Sequence	Item Type		Disbt Plan		Split Code		Offer Amount		
10	911000000000	PELL					$0.00	Message	Disbursement
20	911000000100	FSEOG					$0.00	Message	Disbursement
30	911000000110	SEOGWAIT					$0.00	Message	Disbursement
40	912000000000	WCG	09	SuFaWiSp	F1	Fall	$849.00		Disbursement
50	912000000000	WCG	09	SuFaWiSp	W1	Wi	$849.00		Disbursement
60	912000000000	WCG	09	SuFaWiSp	S1	Sp	$849.00		Disbursement
70	912000000200	COLLBOUND					$0.00	Message	Disbursement
80	912000000200	COLLBOUND					$0.00	Message	Disbursement
90	912000000200	COLLBOUND					$0.00	Message	Disbursement
100	912000000200	COLLBOUND					$0.00	Message	Disbursement
110	912000000200	COLLBOUND					$0.00	Message	Disbursement
120	912000000200	COLLBOUND					$0.00	Message	Disbursement
130	912000000250	WBG					$0.00	Message	Disbursement
140	913000000000	TUITGRNT					$0.00	Message	Disbursement
150	913000000010	FACCGW					$0.00	Message	Disbursement
160	913000000000	TUITGRNT					$0.00	Message	Disbursement
170	913000000100	NBGRANT					$0.00	Message	Disbursement
180	913000000101	NBGRANTWT					$0.00	Message	Disbursement
190	913000000100	NBGRANT					$0.00	Message	Disbursement
200	930000000000	OFFERWS	09	SuFaWiSp	AY	Fa-Wi-Sp	$6,000.00		Disbursement
210	961000001100	SUBDL1	30	Ln FaWiSp	L1	Fa-Wi-Sp	$0.00	Message	Disbursement
220	961000002100	UNSUBDL1	30	Ln FaWiSp	L1	Fa-Wi-Sp	$0.00	Message	Disbursement
230	961000001100	SUBDL1	30	Ln FaWiSp	L1	Fa-Wi-Sp	$3,500.00		Disbursement
240	961000002100	UNSUBDL1	30	Ln FaWiSp	L1	Fa-Wi-Sp	$6,000.00		Disbursement

Return to Search Notify

Eligibility and Need | Awards Detail

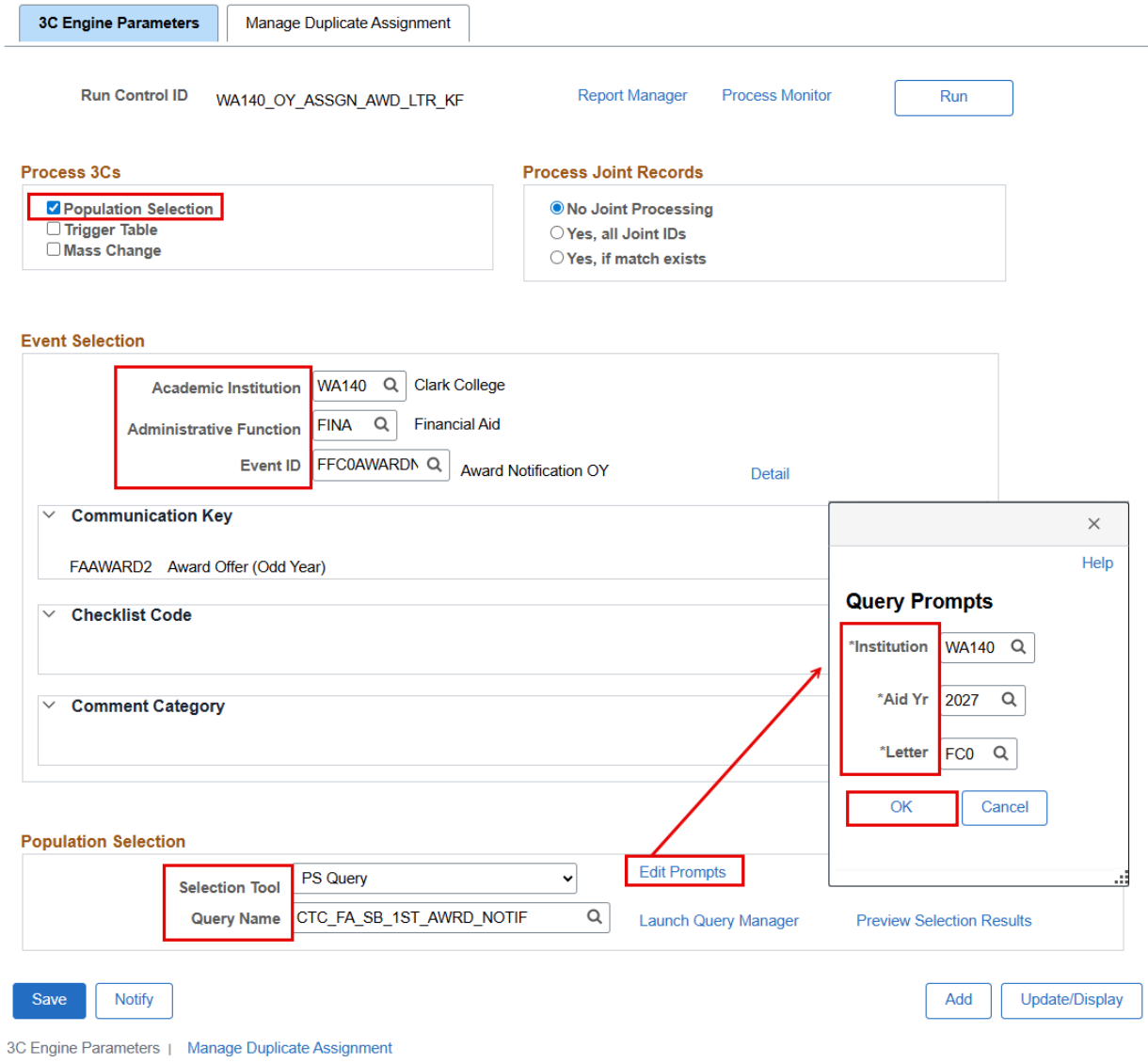
Award Notification

Assigning Award Communication

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Assigning and Sending Award Notifications

3C Engine Parameters

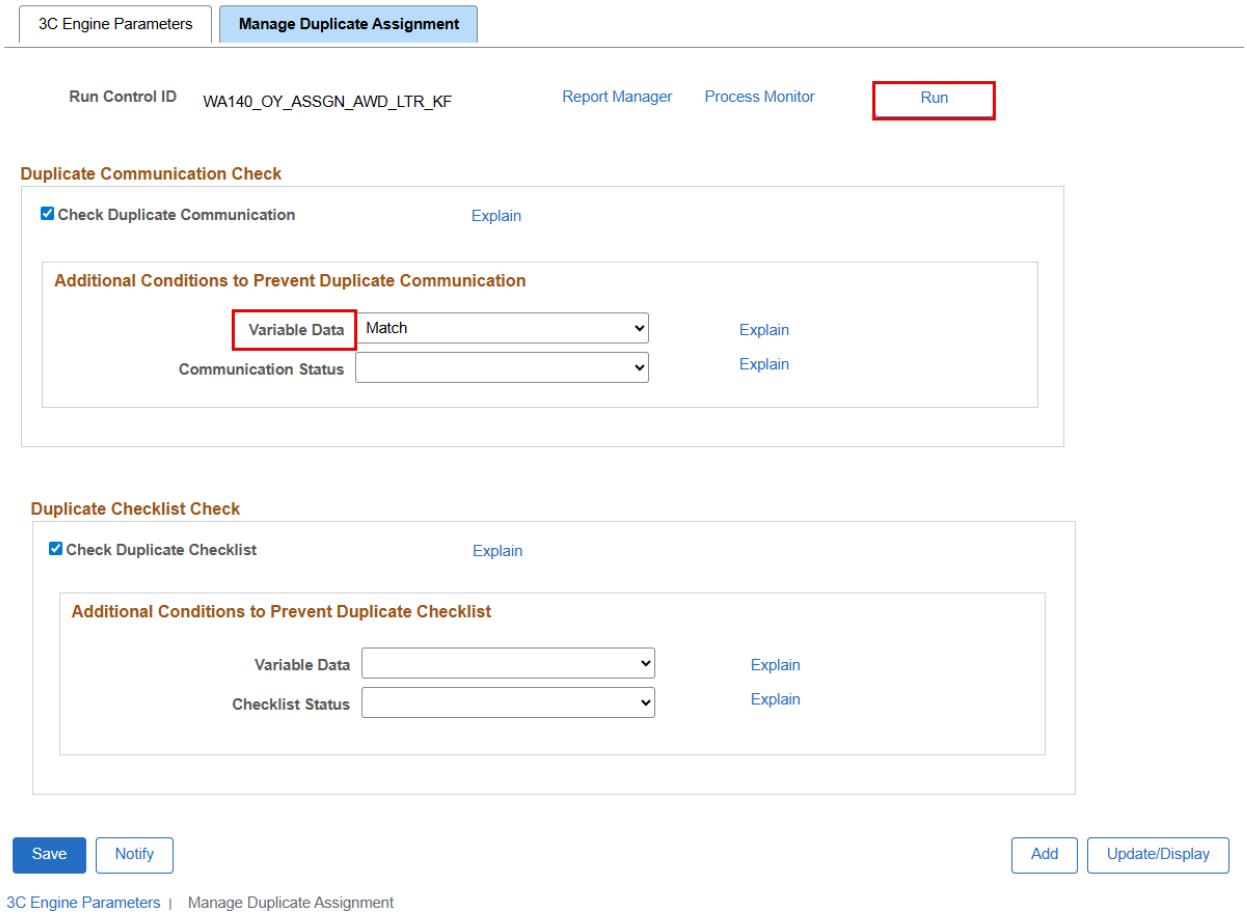
1. Enter New or use existing Run Control ID
2. Select Population Selection
3. Enter Academic Institution
4. Administrative Function = FINA
5. Function Event ID = Choose Award Notification (Code varies between institutions)
6. Selection Tool = PS Query
7. Query Name = CTC_FA_SB_1ST_AWRD_NOTIF (Will include students who have not received an award notification)
8. Select Edit Prompts – Enter the following:
    a. Institution
    b. Aid Year
    c. Letter - Make sure the letter code matches the letter code in the Event ID
9. Select Preview Selection Results



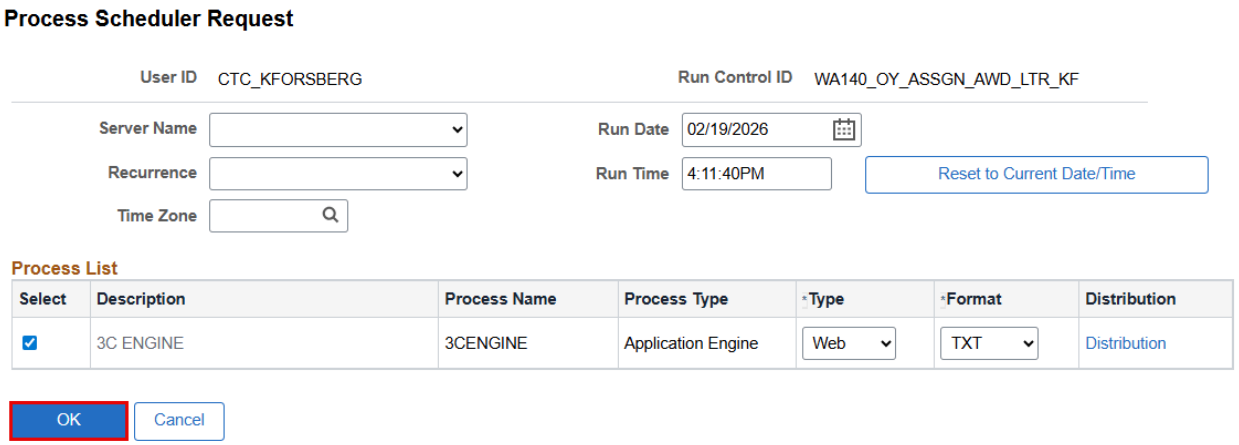
✔ **Select Manage Duplicate Assignment tab**

10. **Under Duplicate Communication Check use the dropdown menu next to 'Variable Data' and choose Match**
11. **Select Run**

Remember – When using the match functionality the student will only receive this letter code once for the aid year. When using the same letter code for 1st *and* revised notifications, uncheck the Duplicate Communication box and leave the Variable Data field blank.



12. From the Process Scheduler Request page select the 3C Engine box and select OK



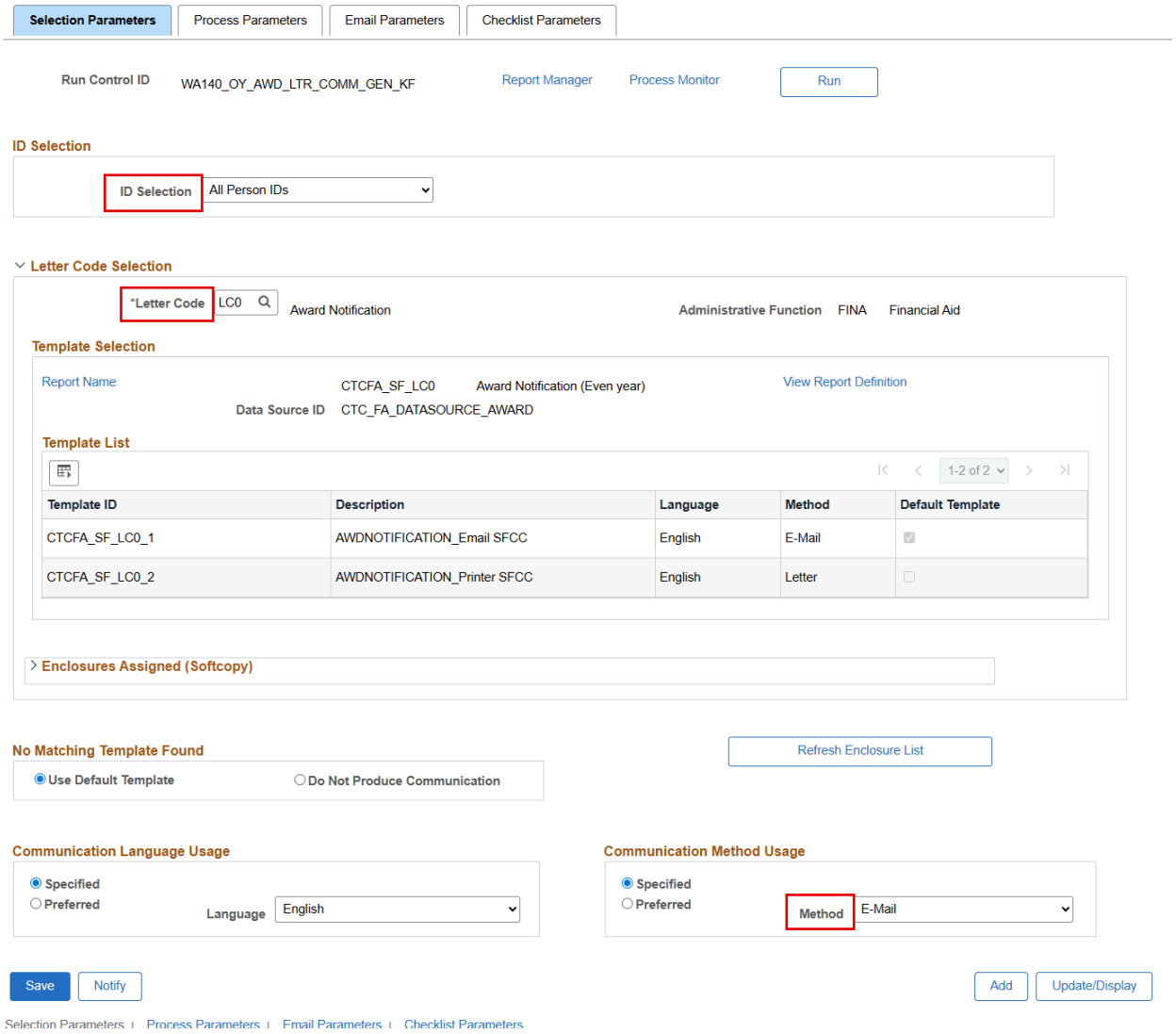
13. Ensure Process Monitor reads Success and Posted

Sending Award Communication

Navigation	Description
Campus Community > Communications > Communication Generation	Assigning and Sending Award Notifications

Selection Parameters

1. Enter New or use existing Run Control ID
2. ID Selection = All Person IDs
3. Letter Code = Choose the letter code from the previous steps
4. Communication Method Usage – Method = E-Mail



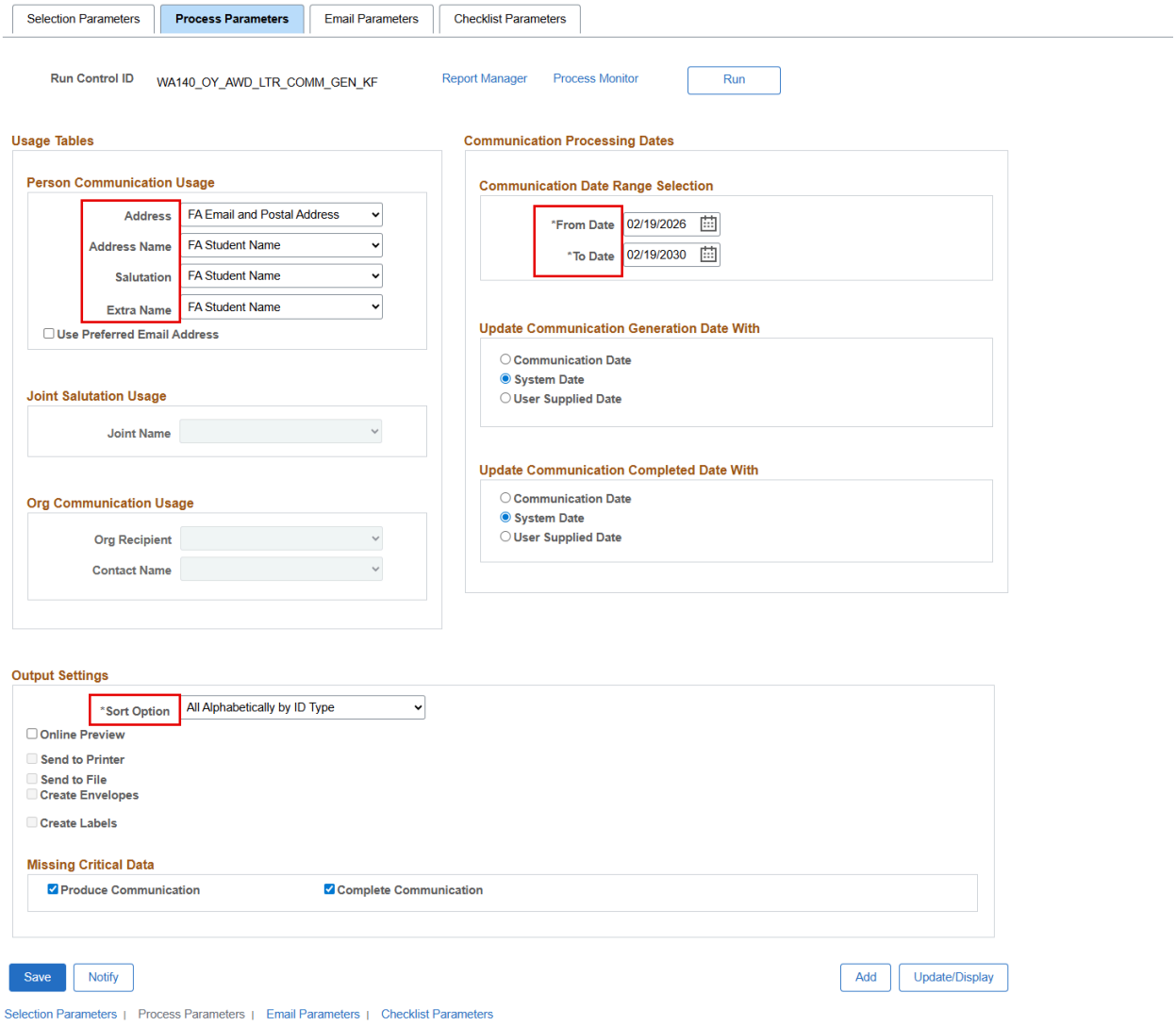
Process Parameters

Person Communication Usage Section:

8. **Address = FA Email and Postal Address**
9. **Address Name = FA Student Name**
10. **Salutation = FA Student Name**
11. **Extra Name = FA Student Name**

Communication Date Range Selection

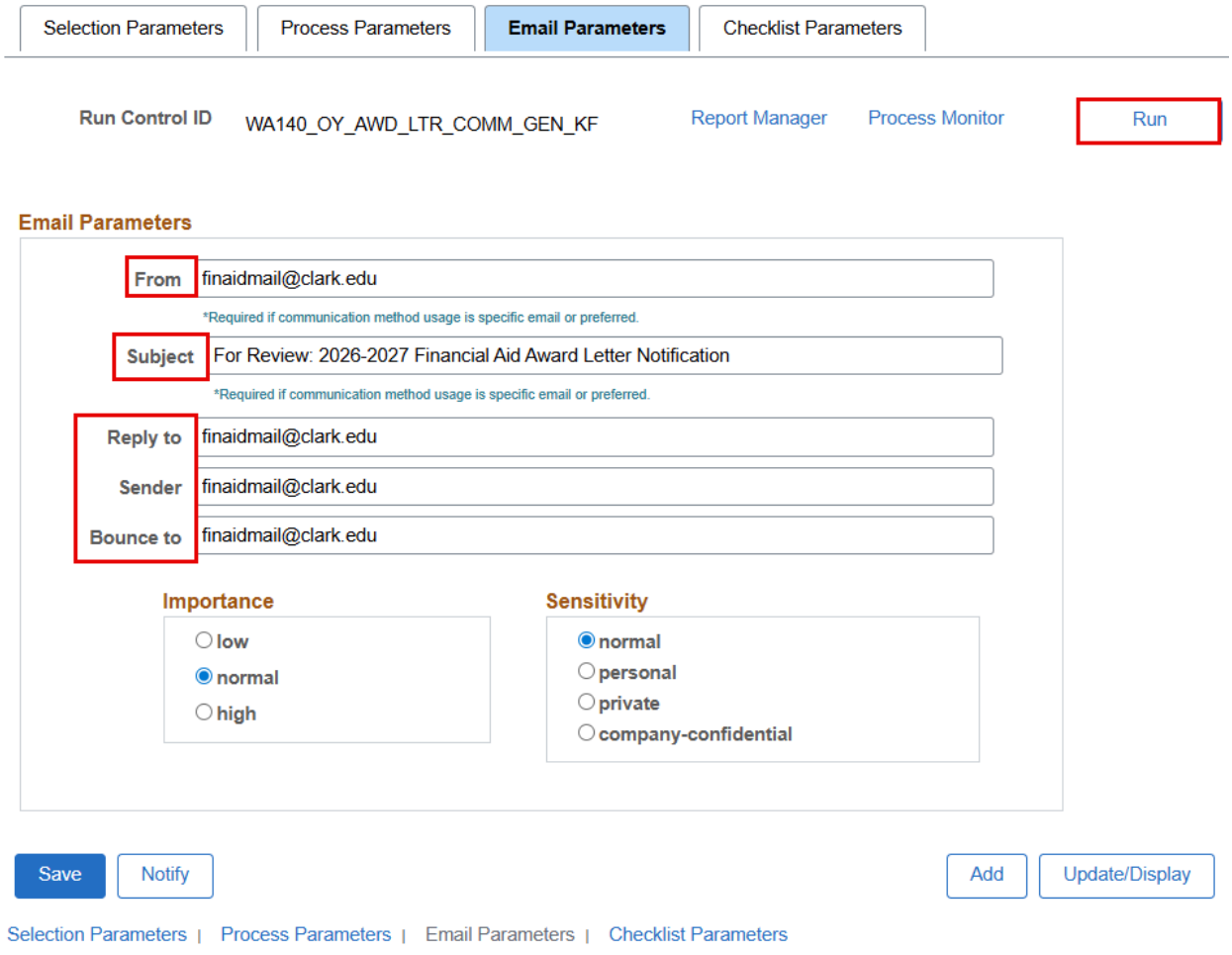
12. **From Date – Select desired date**
13. **To Date – Select current date**
14. **Sort Option – All Alphabetically by ID Type**



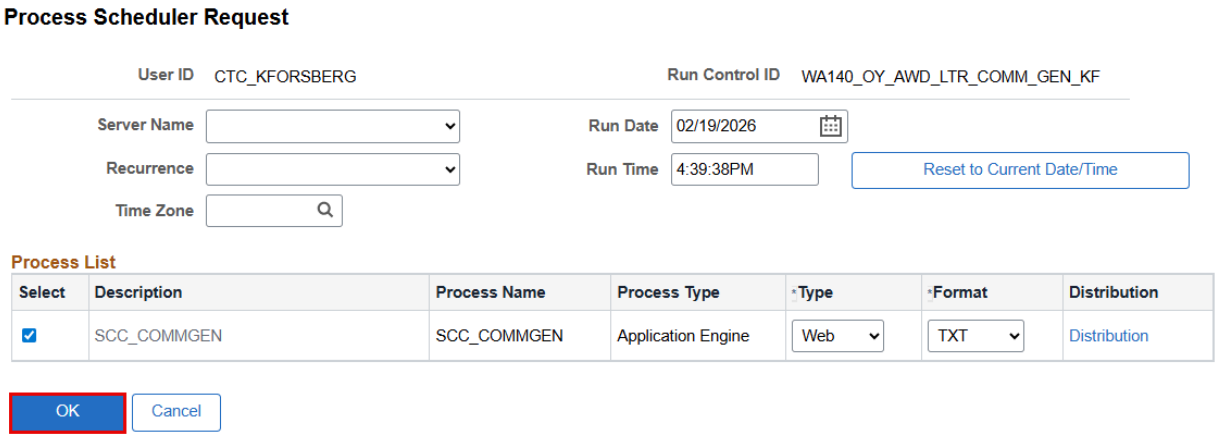
Email Parameters

7. From = Enter the desired email addressed used by the institution
8. Subject = Enter a subject line for the email communication
9. Reply to = Enter the desired email addressed used by the institution
10. Sender = Enter the desired email addressed used by the institution
11. Bounce to = Enter the desired email addressed used by the institution

12. Select Run



Choose SCC_COMMGEN from the Process Scheduler Request – Select OK



Be sure Process Monitor reads Success and Posted

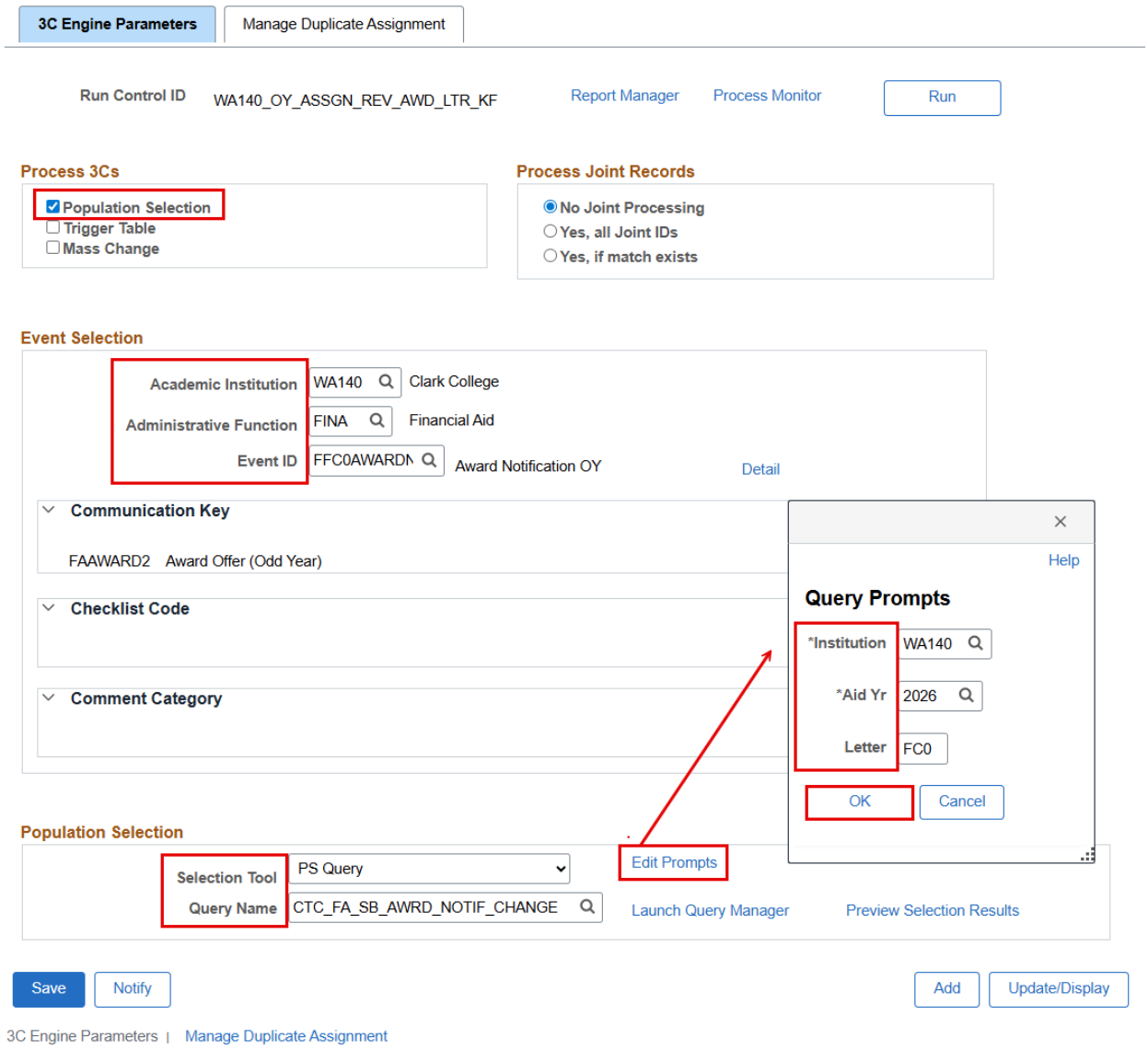
Revised Award Notification

Assigning Revised Award Communication

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Assigning and Sending Revised Award Notifications

3C Engine Parameters

1. Enter New or use existing Run Control ID
2. Select Population Selection
3. Enter Academic Institution
4. Administrative Function = FINA
5. Function Event ID = Choose Award Notification (Code varies between institutions)
6. Selection Tool = PS Query
7. Query Name = QCS_FA_SB_AWRD_NOTIF_CHANGE (Will include students who are receiving a revision award notification)
8. Select Edit Prompts – Enter the following:
    a. Institution
    b. Aid Year
    c. Letter - Make sure the letter code matches the letter code in the Event ID
9. Optional - Select Preview Selection Results

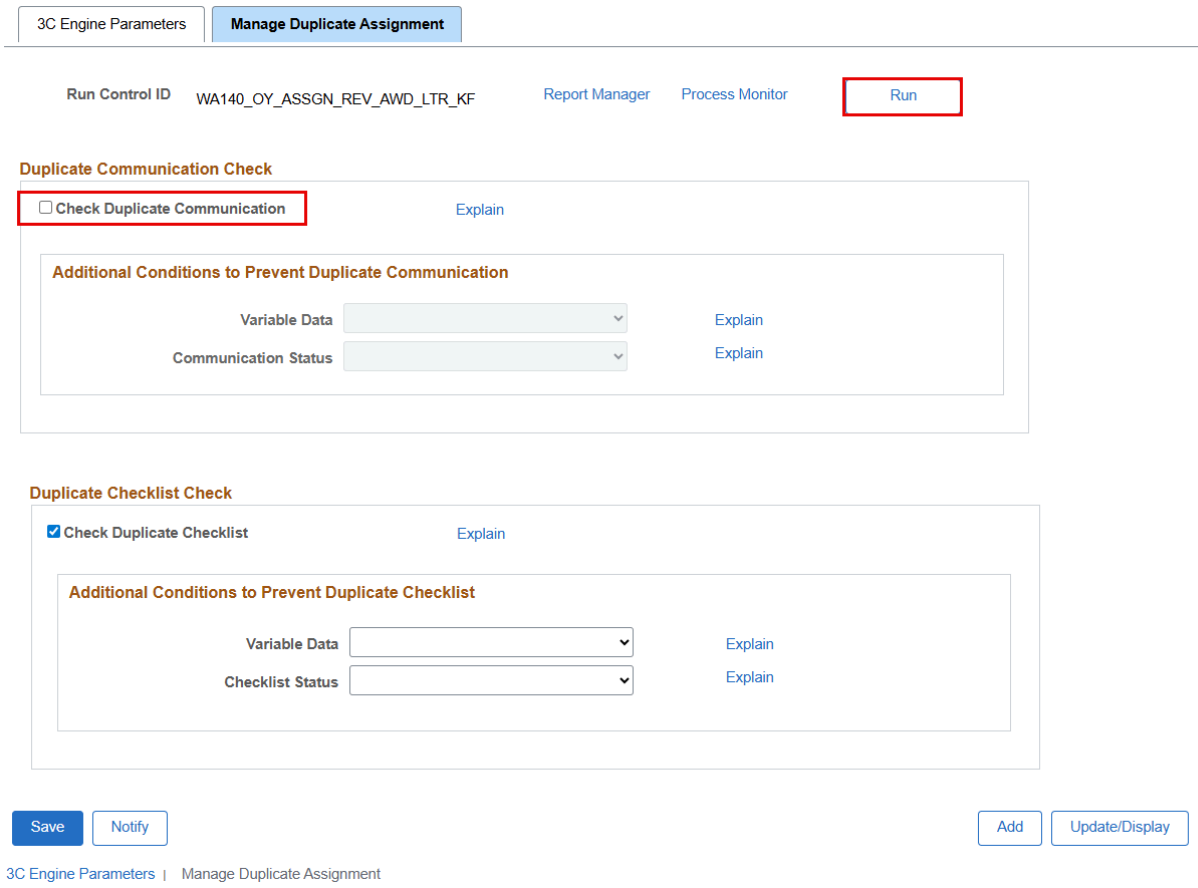


✔ **Select Manage Duplicate Assignment tab**

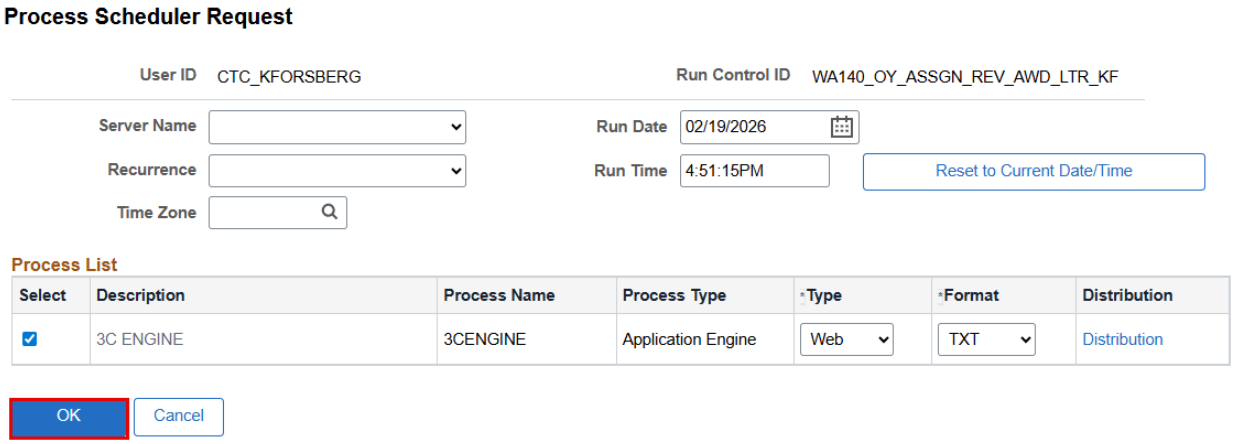
10. The Duplicate Communication Check box should be unchecked

11. Select Run

Remember – When using the match functionality the student will only receive this letter code once for the aid year. When using the same letter code for 1st *and* revised notifications, uncheck the Duplicate Communication box and leave the Variable Data field blank.



12. From the Process Scheduler Request page select the 3C Engine box and select OK



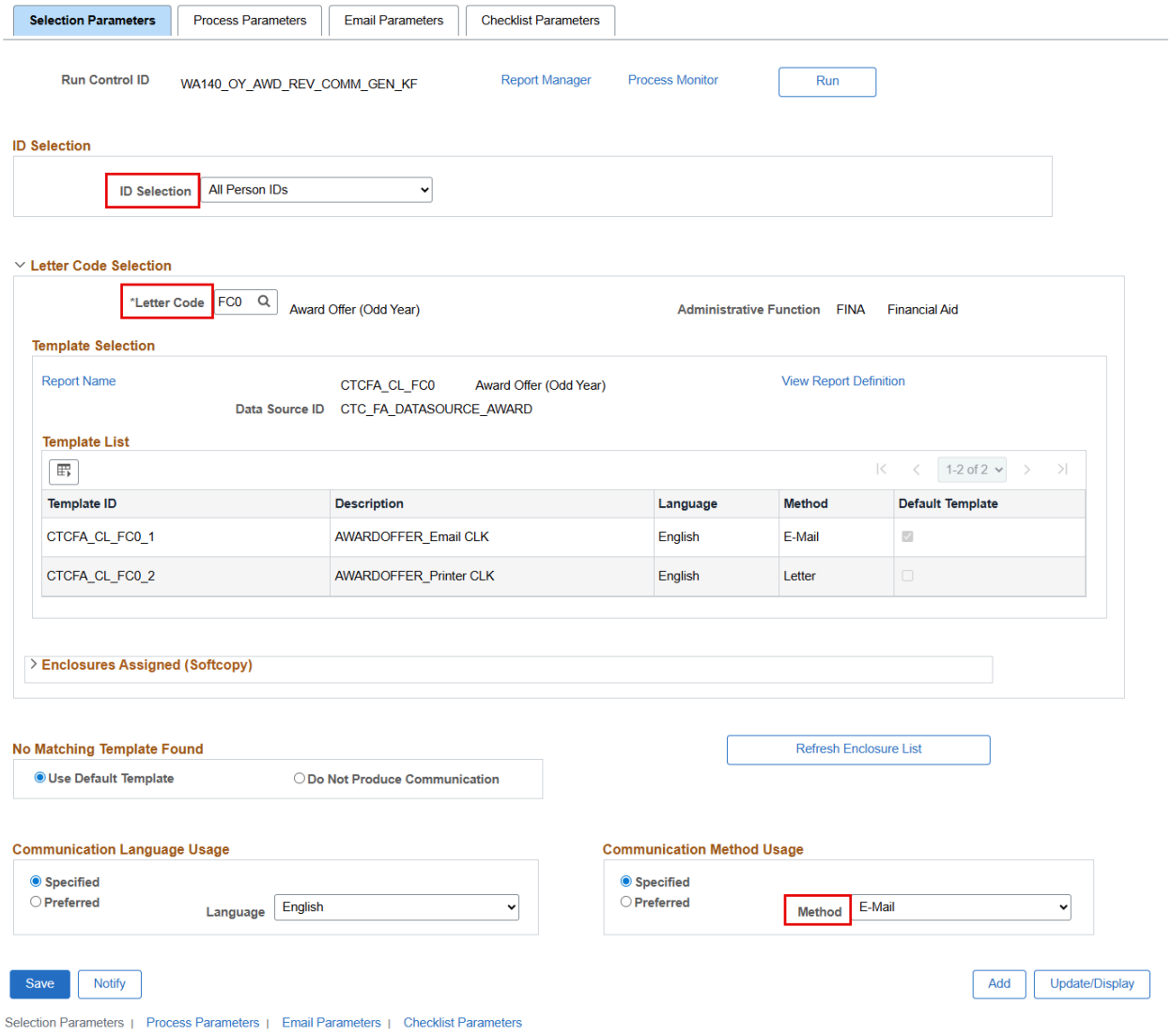
13. Ensure Process Monitor reads Success and Posted

Sending Revised Award Communication

Navigation	Description
Campus Community > Communications > Communication Generation	Assigning and Sending Revised Award Notifications

Selection Parameters

5. Enter New or use existing Run Control ID
6. ID Selection = All Person IDs
7. Letter Code = Choose the letter code from the previous steps
8. Communication Method Usage – Method = E-Mail



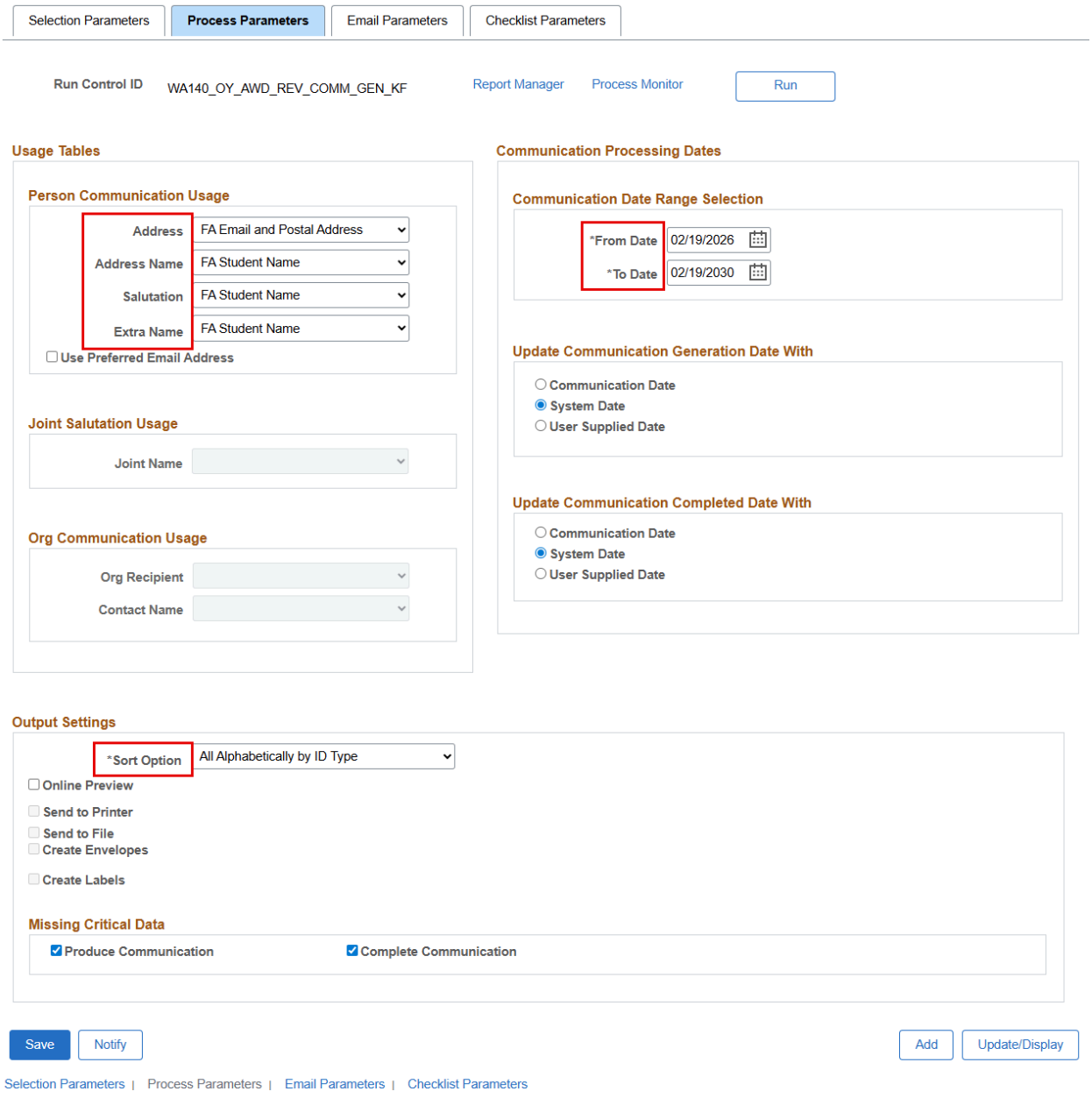
Process Parameters

Person Communication Usage Section:

15. **Address = FA Email and Postal Address**
16. **Address Name = FA Student Name**
17. **Salutation = FA Student Name**
18. **Extra Name = FA Student Name**

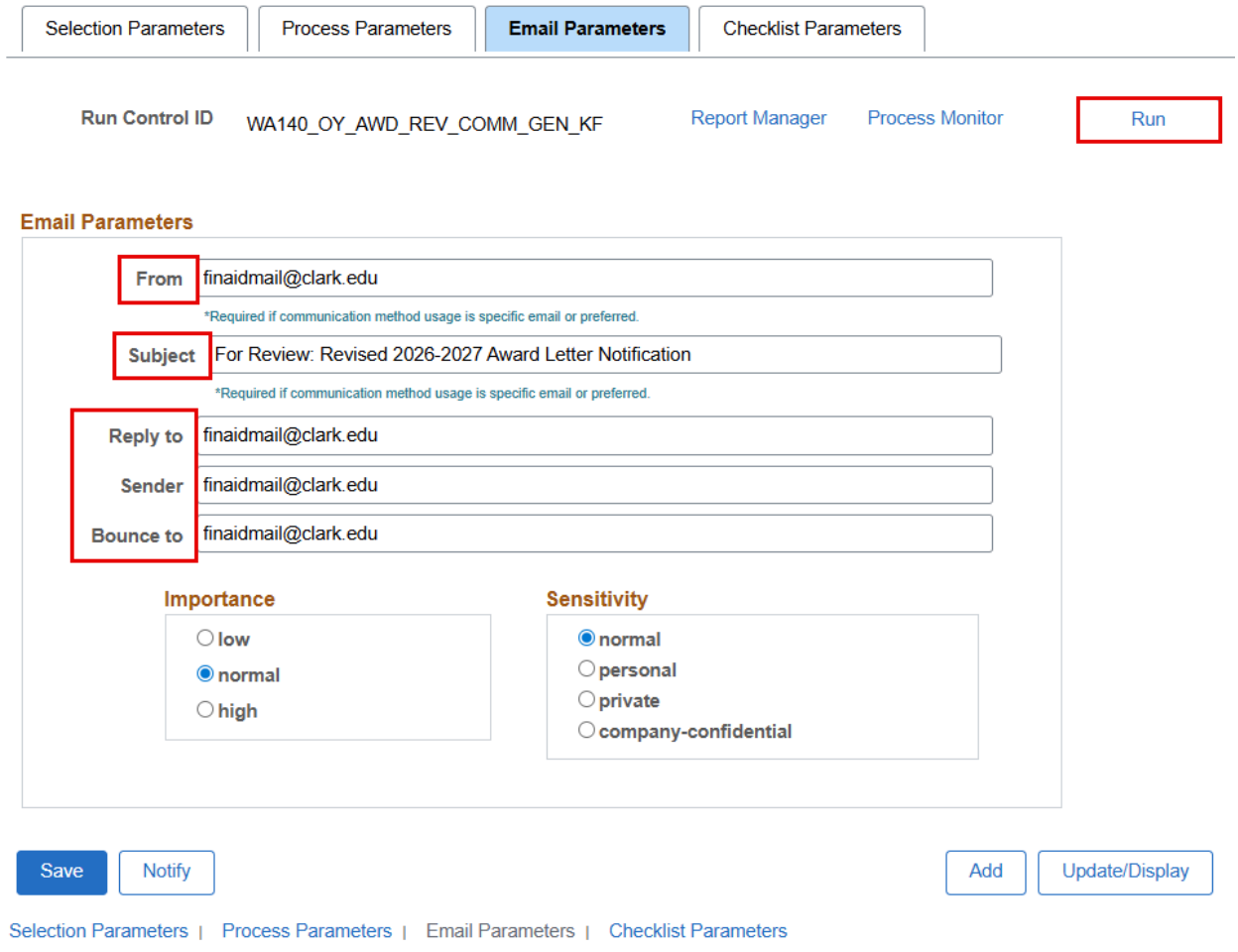
Communication Date Range Selection

19. **From Date – Select desired date**
20. **To Date – Select current date**

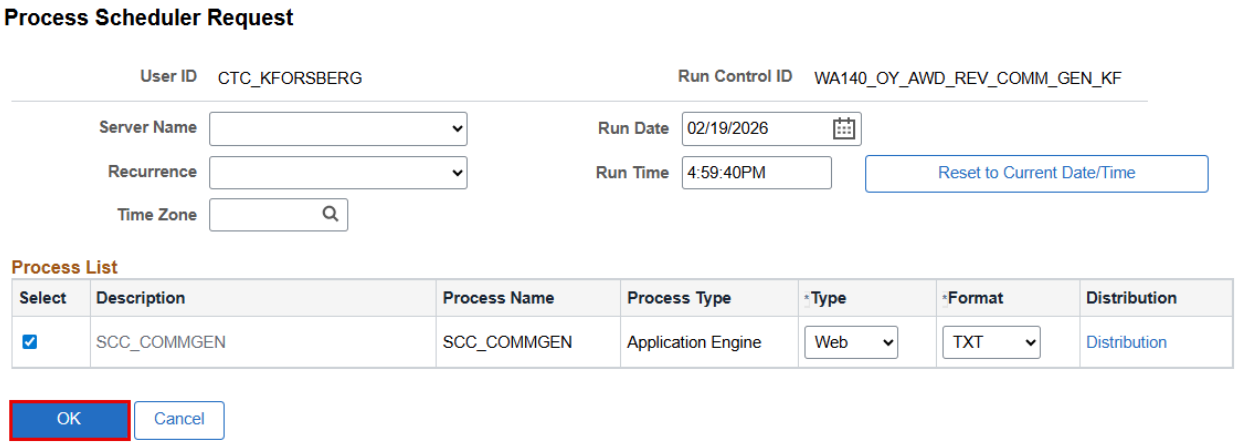


Email Parameters

13. From = Enter the desired email addressed used by the institution
14. Subject = Enter a subject line for the email communication
15. Reply to = Enter the desired email addressed used by the institution
16. Sender = Enter the desired email addressed used by the institution
17. Bounce to = Enter the desired email addressed used by the institution
18. Select Run



Choose SCC_COMMGEN from the Process Scheduler Request – Select OK



Be sure Process Monitor reads Success and Posted

WCG Override Process (Optional)

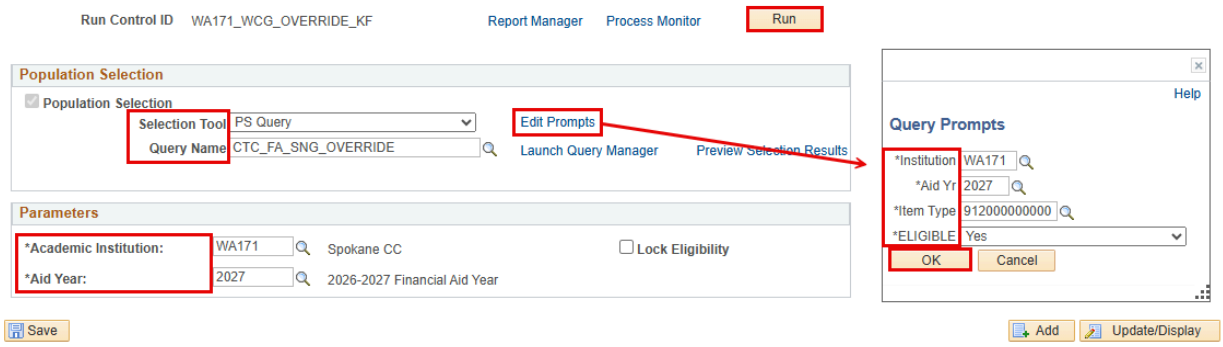
This process is used to lock students' WCG Eligible Data page once their eligibility has been determined (i.e. file review process is complete) and the student has already gone through auto/mass packaging. By locking the WCG Eligible Data page, it would prevent changing the student's eligibility without the college knowing, i.e., if a subsequent ISIR is loaded with updated information.[1]

WCG Override Process

Navigation	Description
Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Override Process	**This optional process checks the Lock Eligibility Override checkbox on the WCG Eligible Data page for students who have already been packaged a WCG award with an Offer Amount greater than zero.**

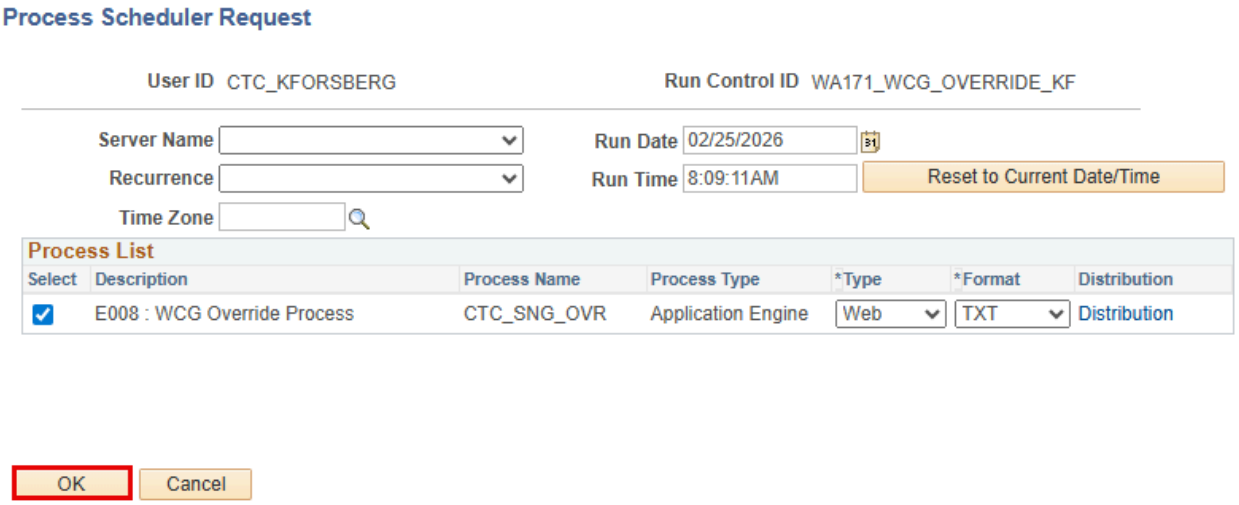
Enter New or use existing Run Control ID

- **Choose PS Query from the Selection Tool dropdown menu**
- **Use the look up tool next to Query Name to choose: QCS_FA_SNG_OVERRIDE**
- **Select the Edit Prompts link and enter the following information:**
  - **Institution**
  - **Aid Year**
  - **Item Type – e.g. Washington College Grant Item Type 912000000000**
  - **Choose 'Yes' from the Eligible dropdown menu**
- **Under Parameters enter Institution and Aid Year**
- **Select the 'Lock Eligibility' checkbox**
- **Select Run**



[1] For colleges who have used the FAM application prior to conversion to ctcLink, this process was intended to mimic when the Date Received field was populated for 'WA' track code to prevent the student's eligibility from changing when a new ISIR was loaded.

From the Process Scheduler Request page select the Select box and select OK



Ensure the process runs to Success and Posted

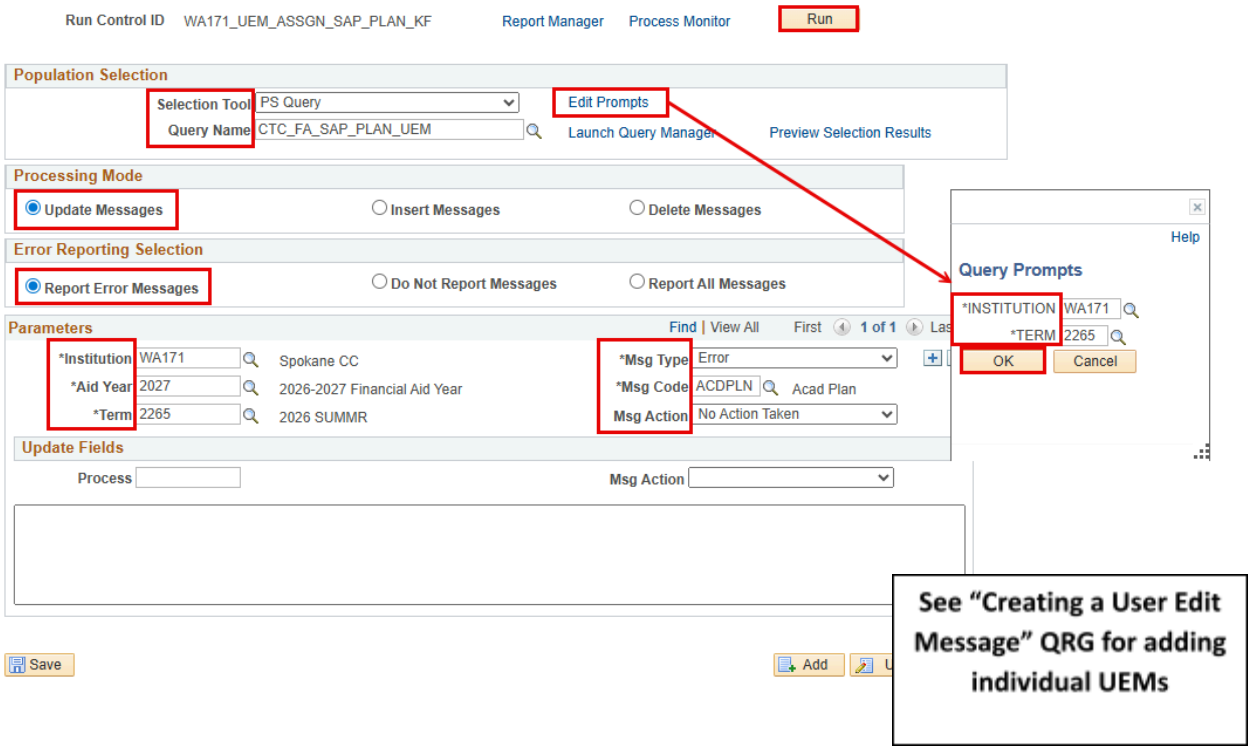
Managing User Edit Messages – UEMs

Assign User Edit Messages (Batch) - For SAP Plan Students

Navigation	Description
Financial Aid > Disbursement > Process User Edit Message	Assign UEMs to block disbursement for students who have a SAP status of 'PLAN' and an accepted award this an amount greater than zero

*Note ctcLink has configured UEMs that will impact only traditional aid

1. Enter New or use existing Run Control ID
2. Choose PS Query for the Selection Tool field
3. Use the look up tool next to the Query Name field and populate with the following: CTC_FA_SAP_PLAN_UEM
4. Select the Edit Prompts link and populate with Institution and Aid Year
5. In the Processing Mode section select the Update Messages radio button
6. In the Error Reporting Selection sector select the Report Error Messages radio button
7. Under the Parameters section populate the following fields:
    a. Institution = Desired Institution
    b. Aid Year = Desired Aid Year
    c. Term = Desired Term
    d. Process = Blank
    e. Msg Type = Error
    f. Msg Code = ACDPLN (Acad Plan)
    g. Msg Action = None Taken
8. Select Run then OK
9. Watch the Process Monitor for 'Success' and 'Posted'



Enrollment Level Hold/Service Indicator Process-Enrollment Intensity

The steps in this section support the authorization and disbursement process, preventing the disbursement of financial aid that exceeds the amount for which the student is eligible, based on enrollment intensity. The process identifies students whose enrollment intensity at the time of awarding is different than the enrollment intensity at the time of authorization and disbursement. In addition, the process identifies students who need their awards adjusted from full-time to less-than-full-time.

By following these steps, the colleges will be:

- Mass updating the packaging variables page to include '1.00'(full-time) enrollment intensity for all term in the Var **Num** 1-4 fields. The current FLF process uses the Var **Char** 1-4 fields.
- Mass assigning the 'FLF' service indicator for students whose Enrollment Intensity value on FA Term is other than full-time and the packaging variable is '1.00.' for the term. If the 'LFTDH' service impact is included in the Define Item Type Rules setup, disbursement of aid will not occur until colleges have a chance to review and make necessary adjustments.
- Reviewing the Authorization Failure Report (or FLF only query list) and making any necessary adjustments to the packaging variables page, awards, and/or Enrollment Intensity on FA Term.
- Mass releasing the 'FLF' service indicator for students whose Enrollment Intensity value on FA Term matches the packaging variable value.

FA Support added an additional Reason Code of FAEI-*Enroll Intent less than 100%* to each college's FLF Service Indicator Code. **Please note you will need to have your LSA add this to your Service Indicator Security.**

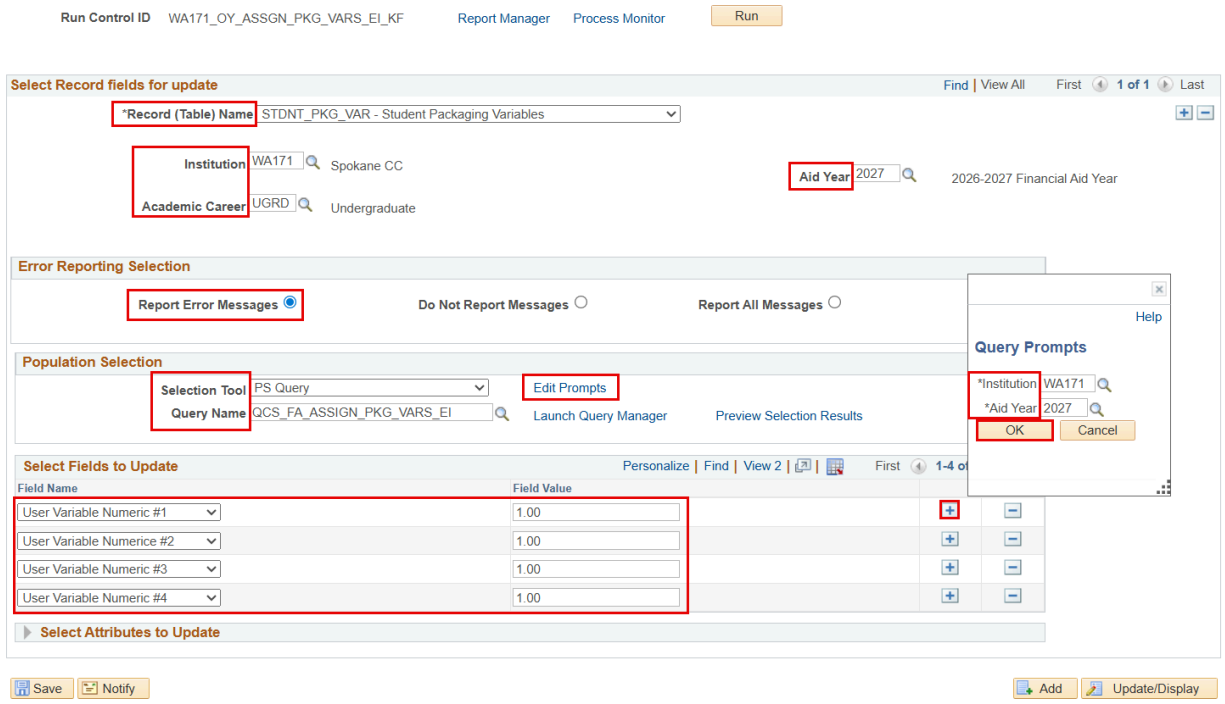
Updating Packaging Variables

Navigation	Description
Set Up SACR > System Administration > Utilities > Population Update > Population Update Process	This process updates the User Var Num #1 - #4 fields on the Assign Packaging Variables page from '0' to '1.00': setting all 4 terms to enrollment intensity 100%. **Note:** • User Variable Number #1 = Fall Term • User Variable Number #2 = Winter Term • User Variable Number #3 = Spring Term • User Variable Number #4 = Summer Term

1. Enter New or use existing Run Control ID
2. Record (Table) Name = STDNT_PKG_VAR – Student Packaging Variables
3. Enter the following:
   - Institution
   - Aid Year
   - Academic Career = UGRD
4. Error Reporting Selection = Check the "Report Error Messages" radio button
5. Selection Tool = PS Query
6. Query Name = QCS_FA_ASSIGN_PKG_VARS_EI
7. Select Edit Prompts and enter the following:
   - Institution
   - Aid Year
   - Select OK
8. Enter the following in the Select Fields to Update section:

Field Name	Field Value
• User Variable Number #1	1.00
• User Variable Number #2	1.00
• User Variable Number #3	1.00
• User Variable Number #4	1.00

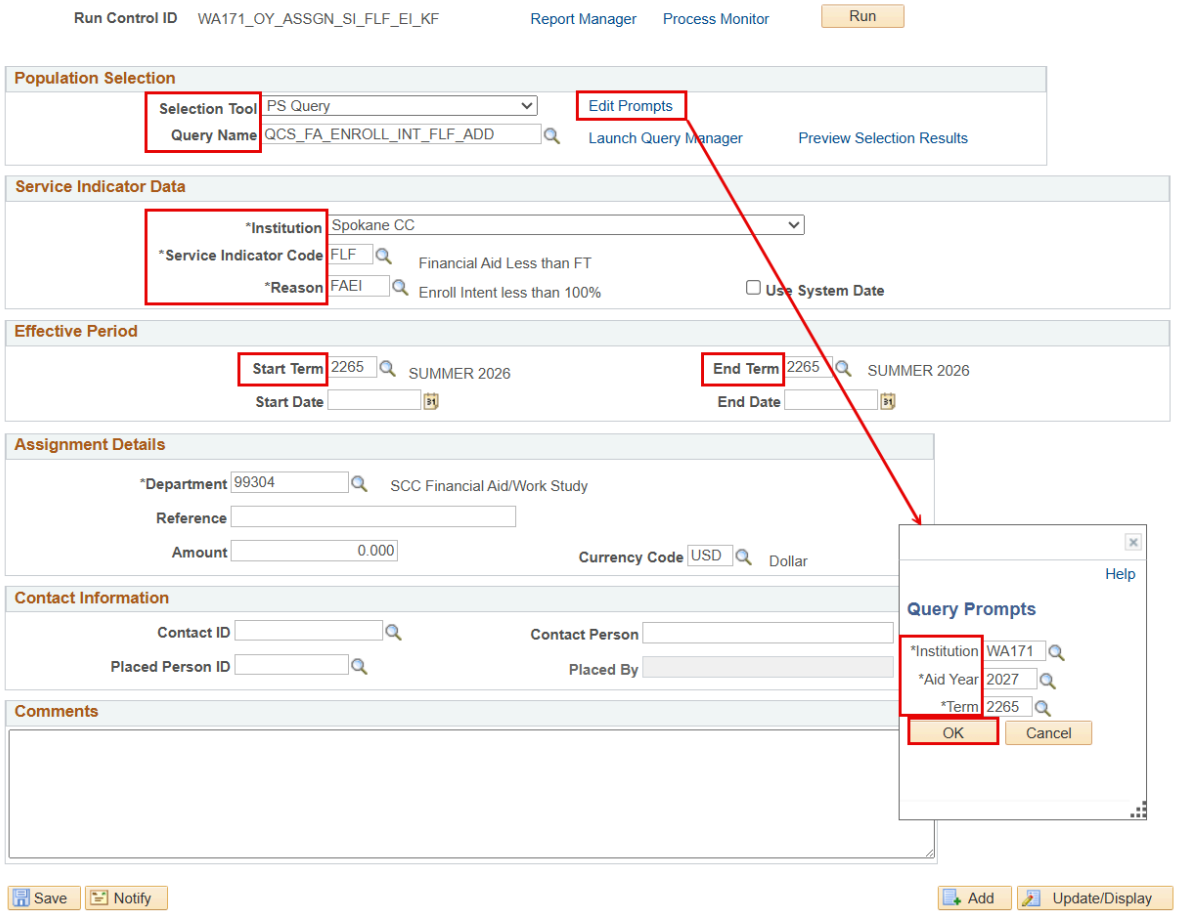
9. Select Preview Selection Results to review list of students receiving the pop update
10. Select Run
11. Ensure the SCC_POP_UPD checkbox is selected, and select OK
12. Ensure process runs to "Success" and "Posted"


Run Control ID WA171_OY_ASSGN_PKG_VARS_EI_KF
Report Manager
Process Monitor
Run
Select Record fields for update
Find | View All
First 1 of 1 Last
*Record (Table) Name STDNT_PKG_VAR - Student Packaging Variables
Institution WA171 Spokane CC
Academic Career UGRD Undergraduate
Aid Year 2027 2026-2027 Financial Aid Year
Error Reporting Selection
Report Error Messages
Do Not Report Messages
Report All Messages
Population Selection
Selection Tool PS Query
Query Name QCS_FA_ASSIGN_PKG_VARS_EI
Edit Prompts
Launch Query Manager
Preview Selection Results
Select Fields to Update
Personalize | Find | View 2 |
First 1-4 of
Field Name
Field Value
User Variable Numeric #1 1.00
User Variable Numerice #2 1.00
User Variable Numeric #3 1.00
User Variable Numeric #4 1.00
Select Attributes to Update
Help
Query Prompts
*Institution WA171
*Aid Year 2027
OK
Cancel
Save
Notify
Add
Update/Display

Assign FLF Service Indicator

Navigation	Description
Campus Community > Service Indicators (Student) > Mass Assign	This process batch-assigns the 'FLF' service indicator to students who have a '1.00' value in the corresponding User Var Num field for the term on which the process is being run but have a value other than '1.00' in the Enrollment Intensity field on FA Term for the same term.

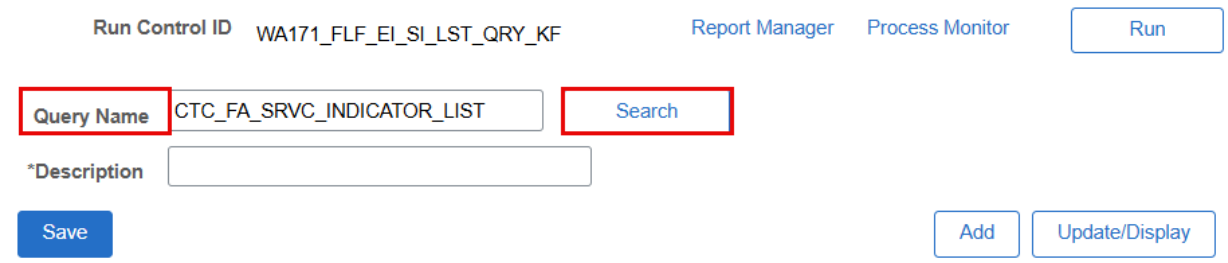
1. Enter New or use existing Run Control ID
2. Query Name = QCS_FA_ENROLL_INT_FLF_ADD
3. Select Edit Prompts and enter the following:
    a. Institution
    b. Aid Year
    c. Term
    d. Select OK
4. Under Service Indicator Data enter the following:
    a. Institution
    b. Service Indicator Code = FLF Financial Aid Less than FT
    c. Reason = FAEI Enrollment Intensity Less Than 100%
5. Under Effective Period choose the desired Start Term and End Term
6. Select Run
7. Select the SCC_SI ASSN checkbox and then select OK
8. Ensure process runs to "Success" and "Posted"



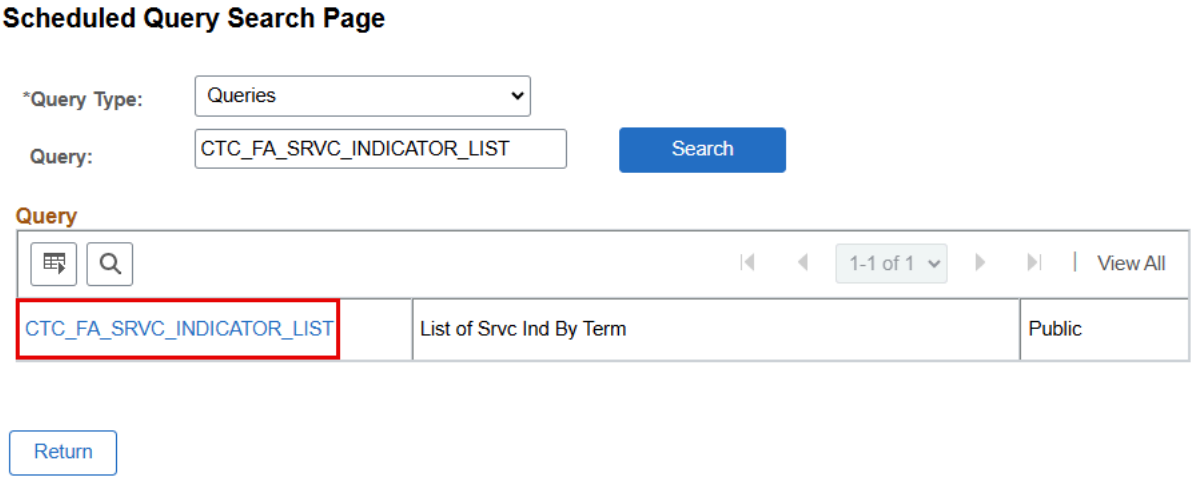
Service Indicator List Query (Optional)

Navigation	Description
Reporting Tools > Query > Schedule Queries	In addition to using the Authorization Failure Report to identify students who have the 'FLF' service indicator assigned that need aid adjusted, and Packaging Variables page updated for the appropriate term, colleges have the option to run a query. The query will list only students with the 'FLF' service indicator.

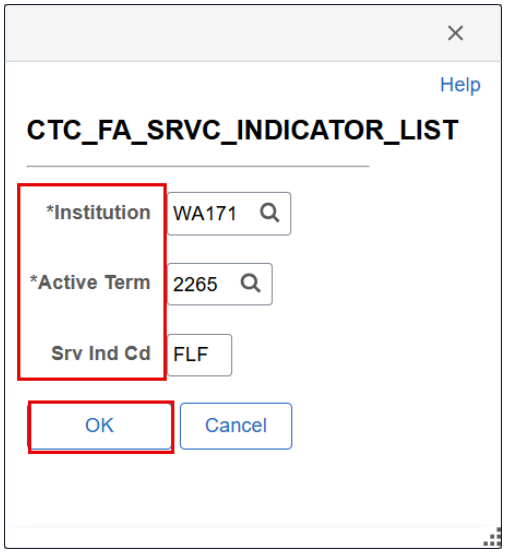
1. Enter New or use existing Run Control ID
2. Query Name = CTC_FA_SRVC_INDICATOR_LIST
3. Select Search



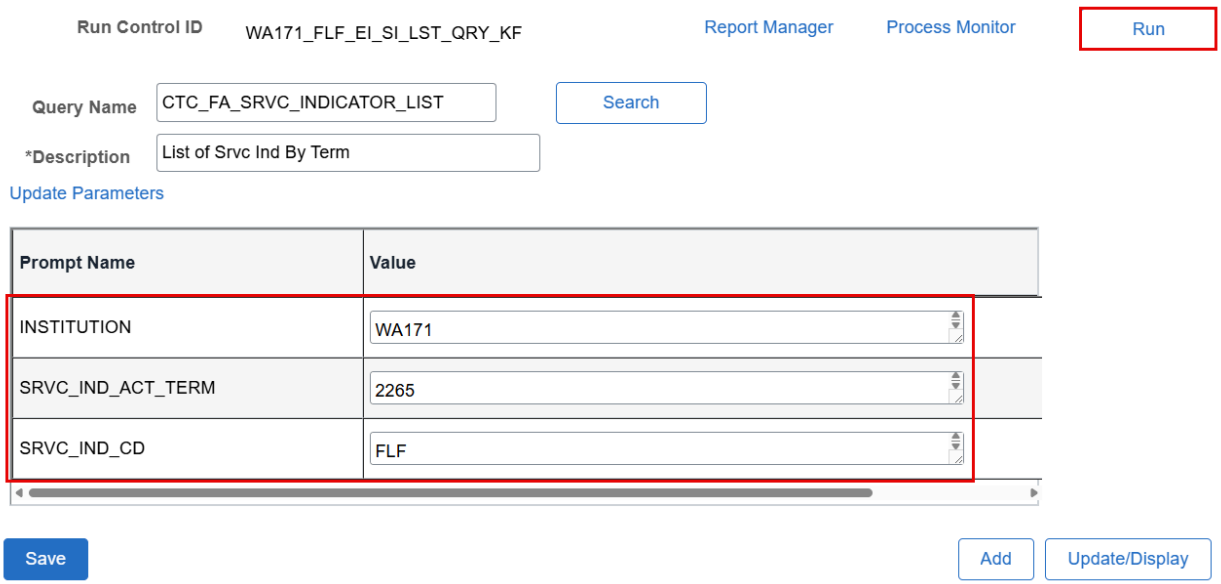
4. **Choose the appropriate Query from the Search results**



5. **Enter the following when the Edit Prompts appear:**
   - **Institution**
   - **Active Term**
   - **Service Indicator Code = FLF**
   - **Select OK**



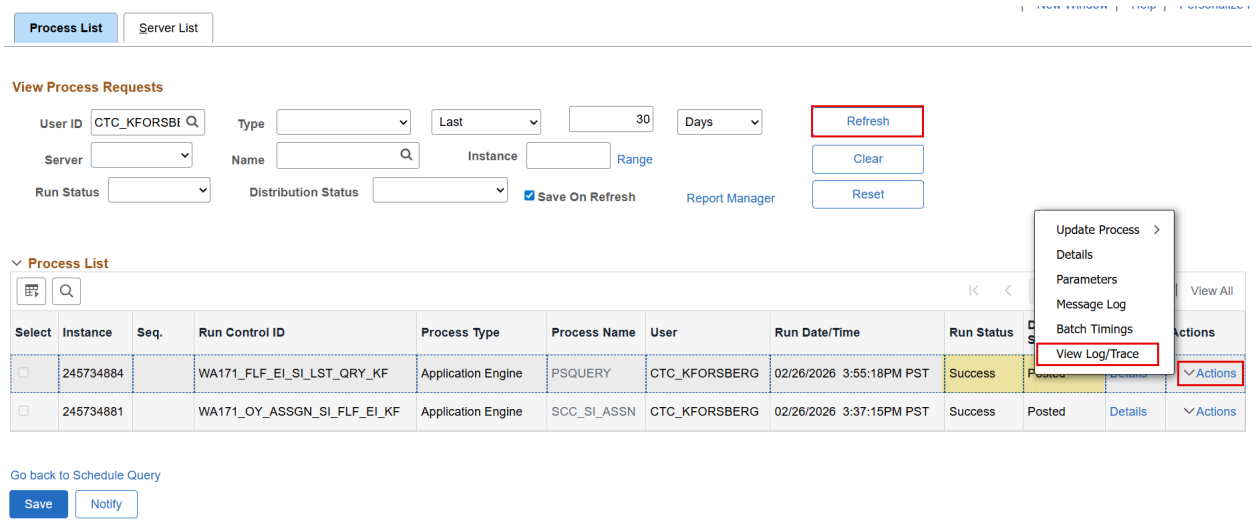
6. **You will be returned to the Schedule Queries page with the fields populated**
7. **Select Run**



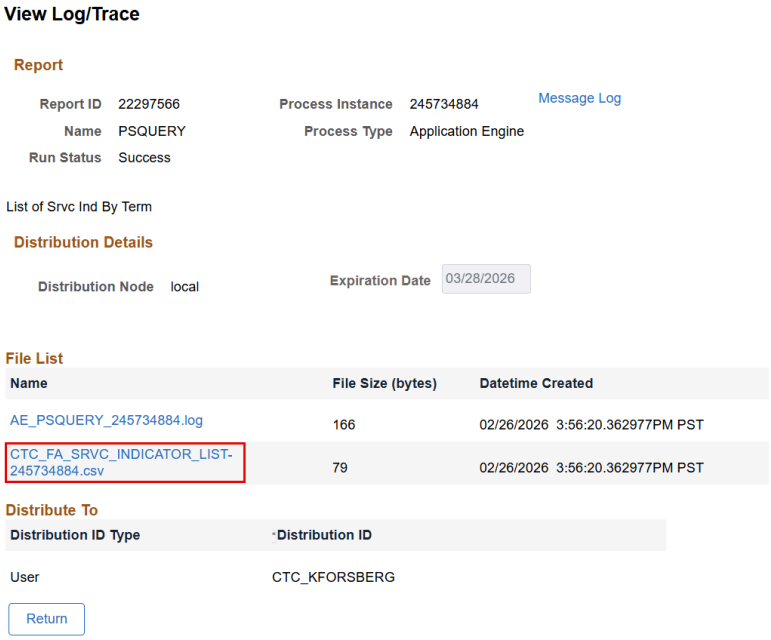
8. **Ensure process runs to "Success" and "Posted"**

Select Process Monitor

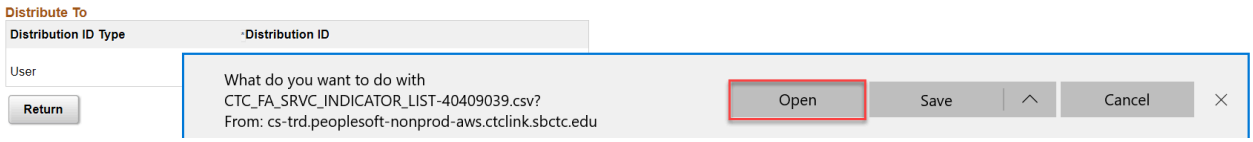
From the Process List select Actions, and then select the View Log/Trace option



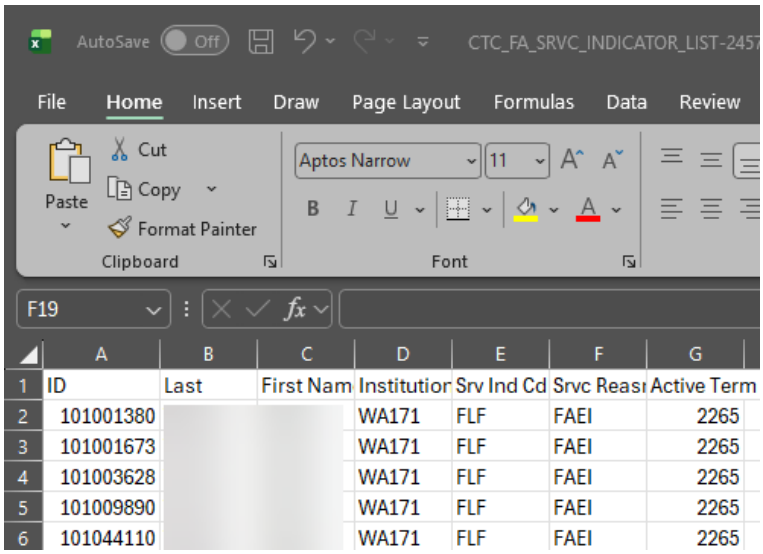
Select the CTC_FA_SRVC_INDICATOR_LIST-xxxxxxx.csv



This link will open a request to open the results in an Excel Spreadsheet Select OK or OPEN



Use the report to update the students listed



	A	B	C	D	E	F	G
1	ID	Last	First Nam	Institutior	Srv Ind Cd	Srvc Reası	Active Term
2	101001380			WA171	FLF	FAEI	2265
3	101001673			WA171	FLF	FAEI	2265
4	101003628			WA171	FLF	FAEI	2265
5	101009890			WA171	FLF	FAEI	2265
6	101044110			WA171	FLF	FAEI	2265

Adjust aid as necessary

Updating Packaging Variables

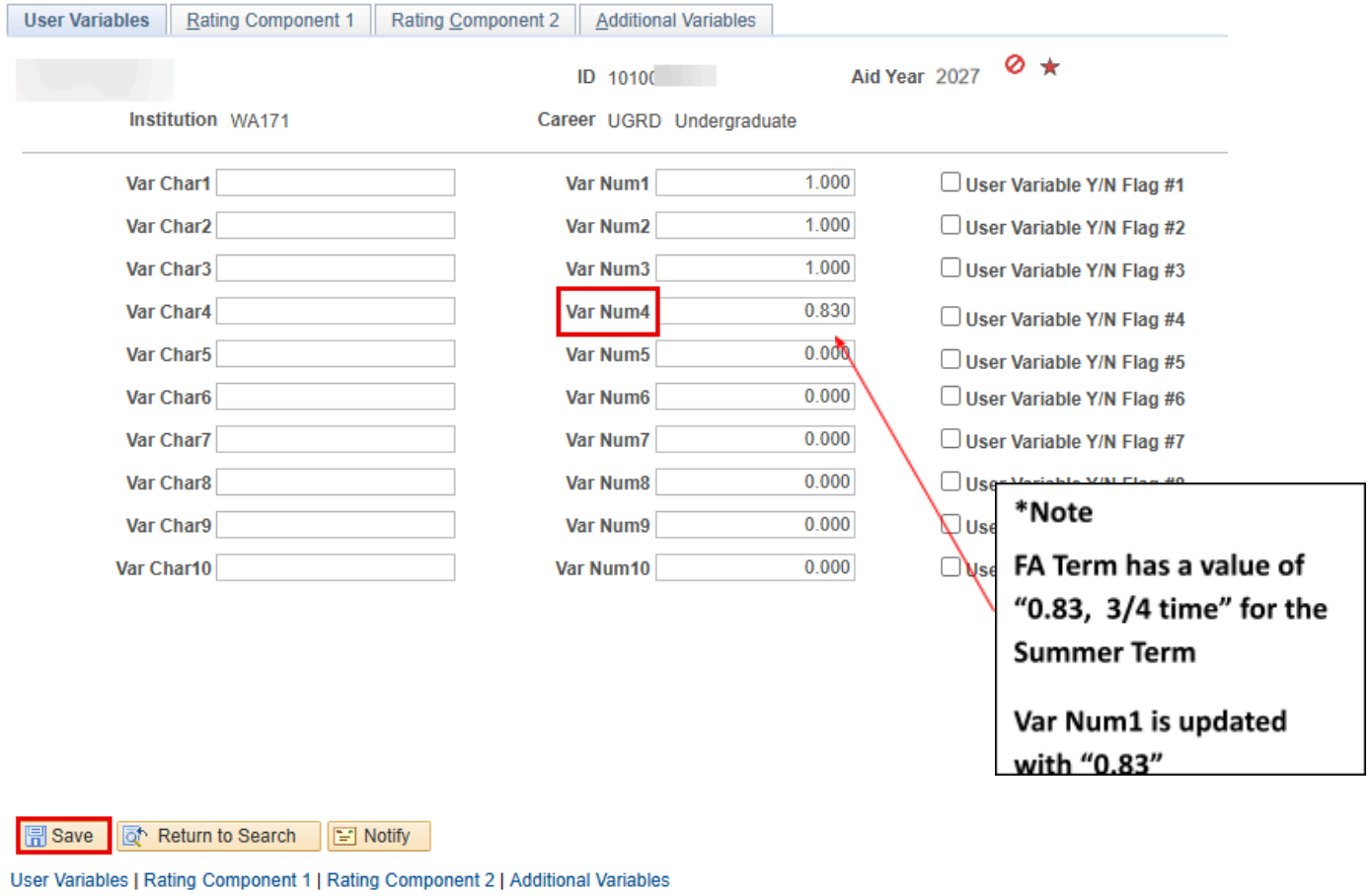
Navigation	Description
Awards > Award Processing > Assign Packaging Variables	Update Packaging Variables to reflect student's enrollment intensity on FA Term

From the Assign Packaging Variables page enter the following:

- **Student ID**
- **Institution**
- **Aid Year**
- **Select Search**

Update Packaging Variable Term values. If, for example, awards for fall are modified, set the Var Num1 to match the FA Term load. The next time the FLF Service Indicator Mass Release runs, the Service Indicator will be removed. They can also be removed manually. Be sure to select Save when updating Packaging Variables.

Note: Var Num1 = Fall, Var Num2 = Winter, Var Num3 = Spring, Var Num4 = Summer

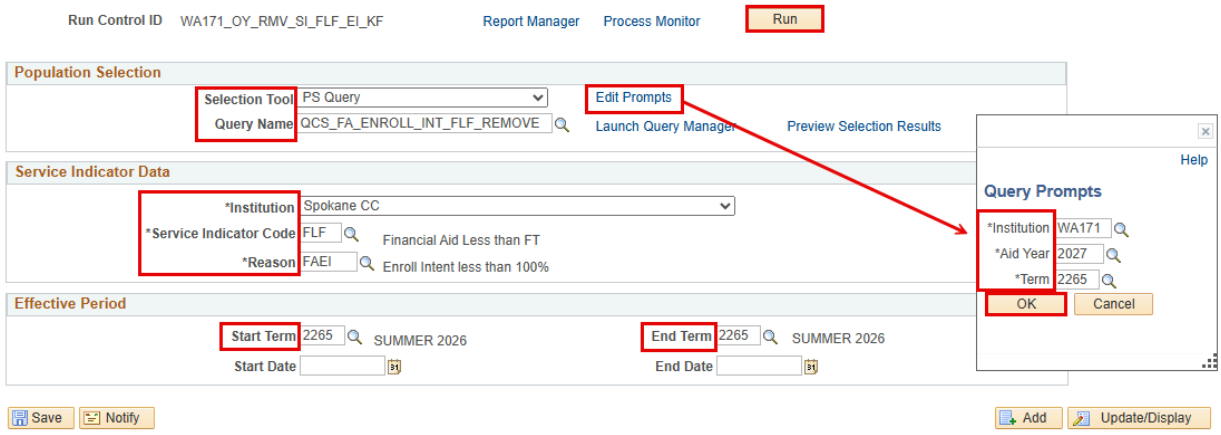


Once the Packaging Variables are updated the awards can be updated to reflect the less than full time enrollment values.

Remove FLF Service Indicator

Navigation	Description
Campus Community > Service Indicators (Student) > Mass Release	Remove FLF Service Indicators from students where all aid has disbursed, or Packaging Variable now matches the corresponding FA Term row.

1. Enter New or use existing Run Control ID
2. Query Name = QCS_FA_ENROLL_INT_FLF_REMOVE
3. Select Edit Prompts and enter the following:
    a. Institution
    b. Aid Year
    c. Term
    d. Select OK
4. Under Service Indicator Data enter the following:
    a. Institution
    b. Service Indicator Code = FLF Financial Aid Less than FT
    c. Reason = FAEI Enroll Intent less than 100%
5. Under Effective Period choose the desired Start Term and End Term
6. Select Run
7. Ensure the select SCC_SI_RLS checkbox is selected and select OK
8. Ensure process runs to “Success” and “Posted”

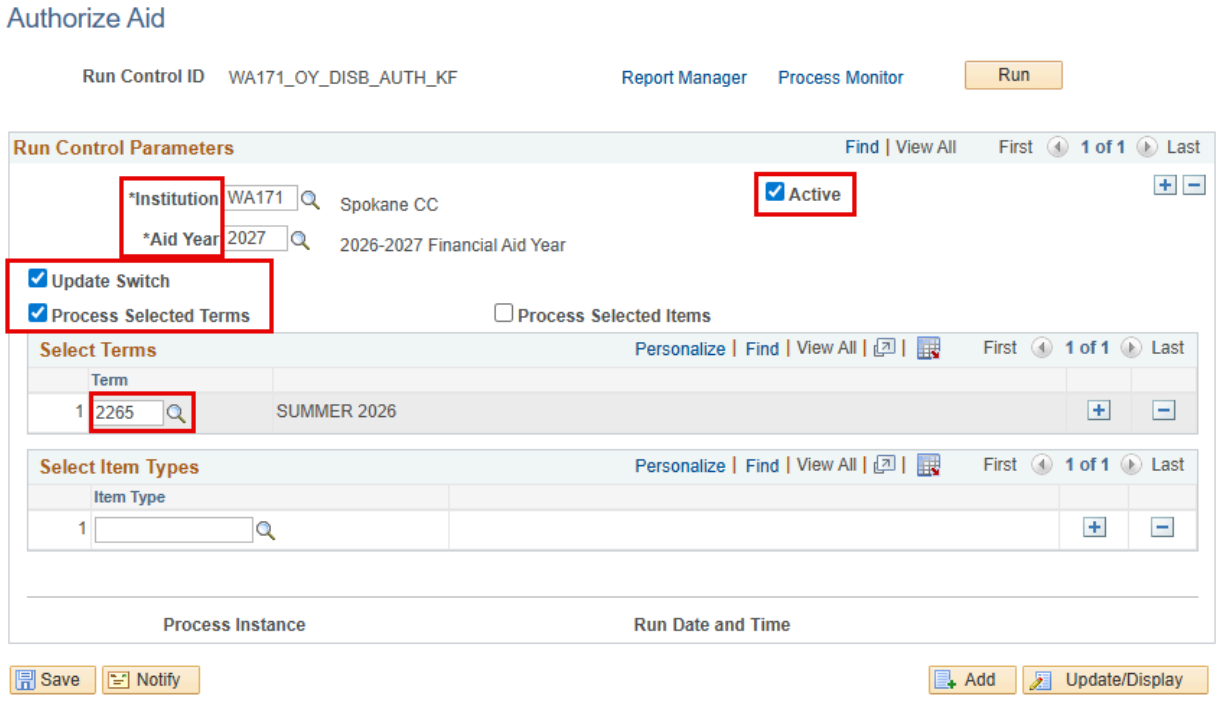


Disbursing Financial Aid

Processing Award Authorization

Navigation	Description
Financial Aid > Disbursement > Process Award Authorizations	Authorize financial aid in batch by selecting records for authorization in preparation for disbursement

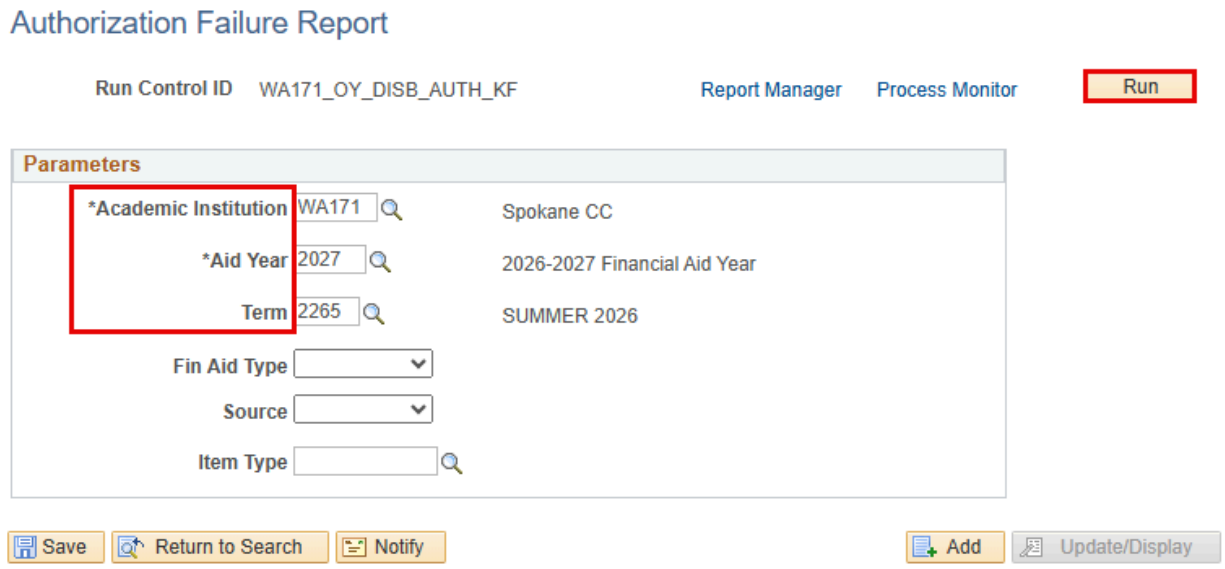
1. Enter New or use existing Run Control ID
2. Under Run Control Parameters populate Institution and Aid Year fields
3. Check the 'Update Switch' and 'Process Selected Term' boxes
    a. *Note – When Update Switch is unchecked an institution is able to run the process in Simulation mode and still view results on the Authorization Failure Report
    b. By checking the Update Switch box an institution is able to run the process in Live mode
4. Under Select Terms fields populate the Term information with the desired term code
5. Ensure the 'Active' box is checked
6. Select Run



Authorization Failure Report

Navigation	Description
Financial Aid > Disbursement > Authorization Failure Report	Used to review student aid that failed to authorize for disbursement.

1. Enter New or Use existing Run Control ID
2. Under Parameters populate the following fields:
    a. Academic Institution
    b. Aid Year
    c. Term (*Note – Ensure this matches the term used in the authorization process)
3. Select Run



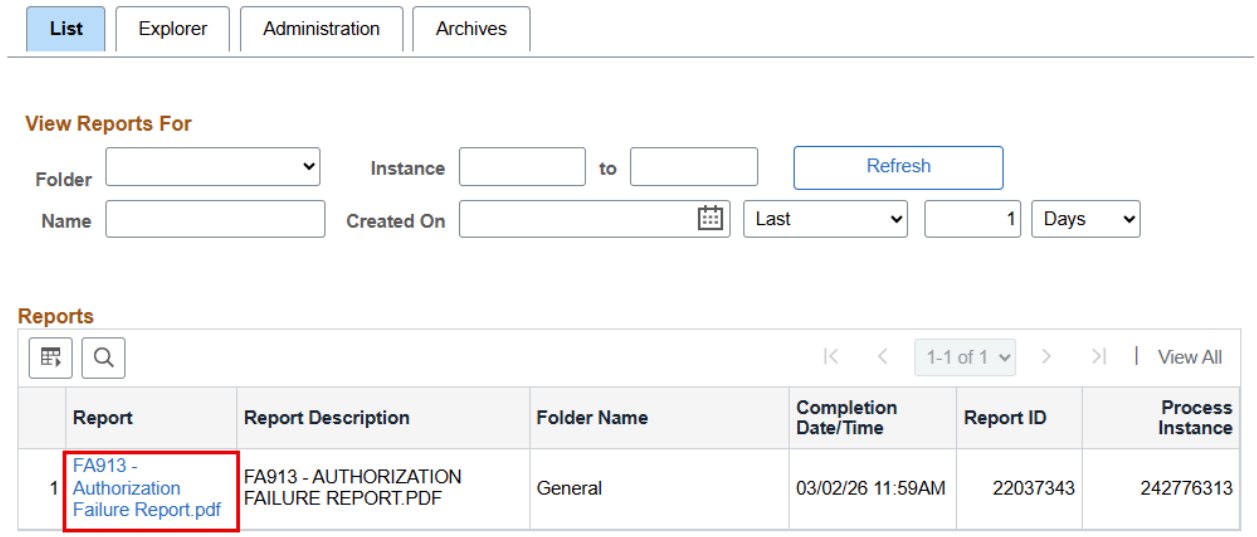
The Process Scheduler Request page will open

- Choose the 'Select' box for the Authorization Failure Report for the Process Type of 'BI Publisher'
- Select OK – Ensure the Process Monitor reads 'Success' and 'Posted'

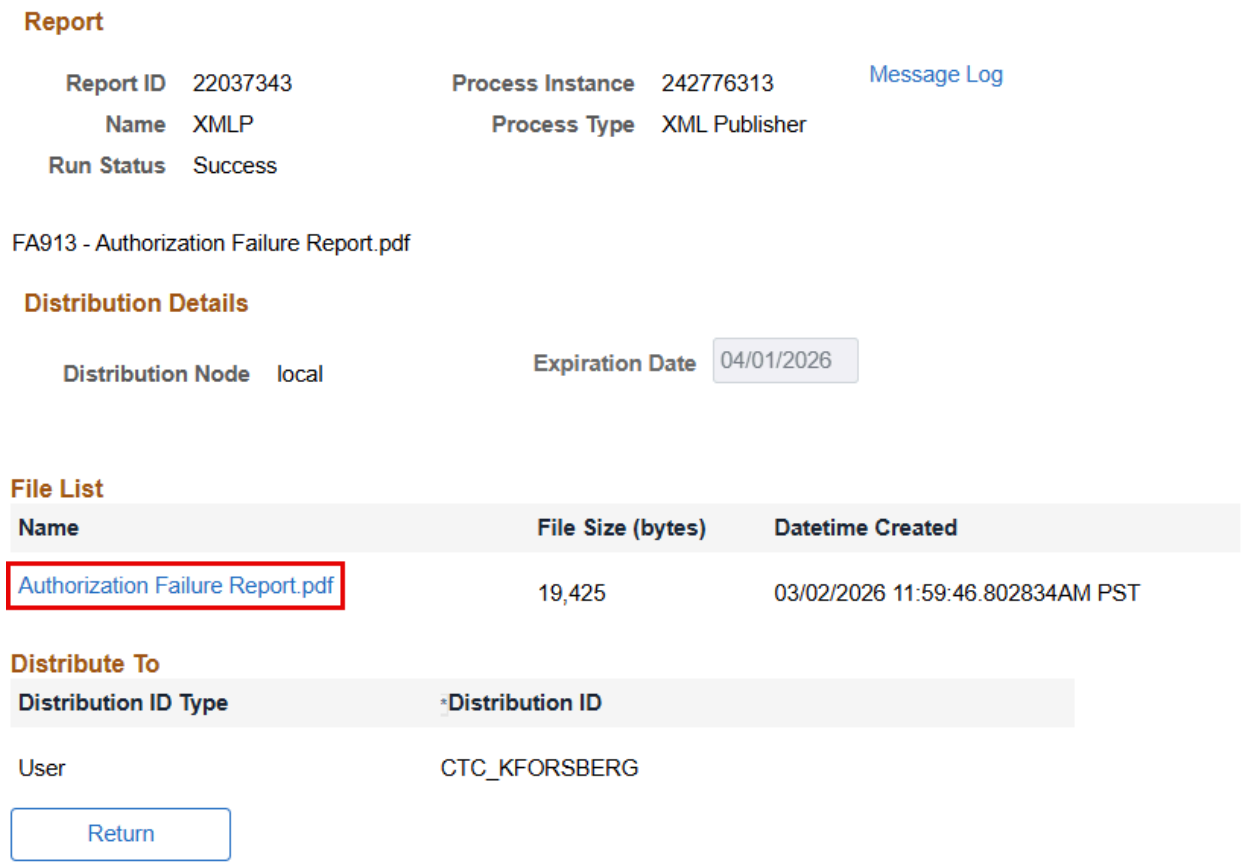
Return to the Authorization Failure Report page and select Report Manger



Select the "FA913-Authorization Failure Report.pdf" link



When the Report opens select the "Authorization Failure Report.pdf" link



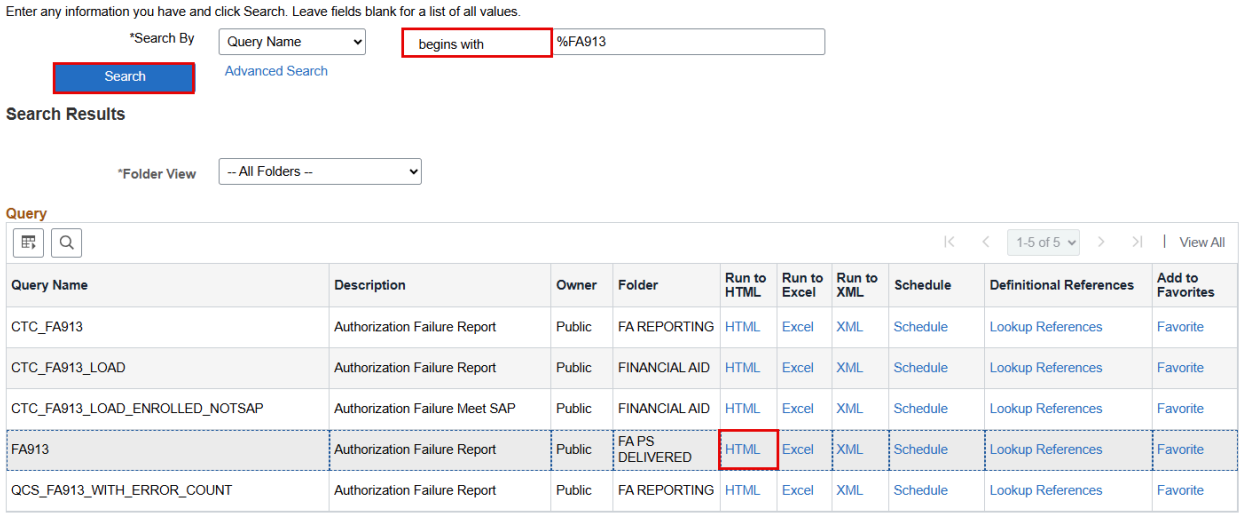
Optional:

The Authorization Failure Report can be run as a query and put into an Excel spreadsheet

Navigation	Description
Reporting Tools > Query > Query Viewer	Used to work the student list whose aid failed to authorize for disbursement.

1. In the Search By fields next to 'begins with' enter: CTC_FA913
2. Select Search
3. Select Run to Excel
4. Enter the 'User ID' and 'Run Control ID' of the person who ran Authorization Failure Report

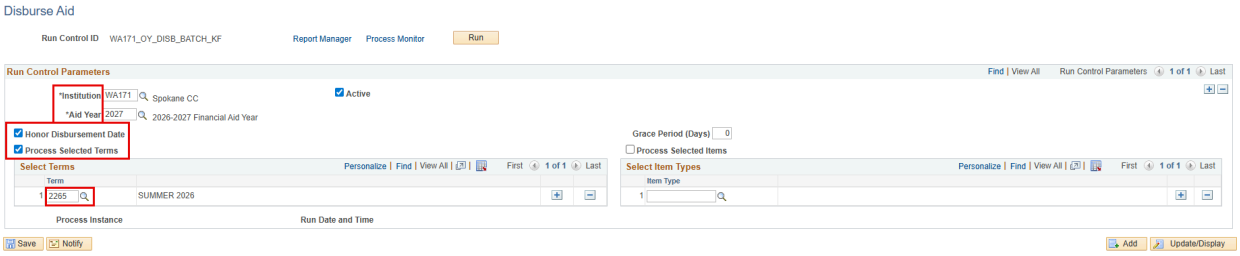
💡 ***Tip!*** **Alternatively, query QCS_FA913_WITH_ERROR_COUNT can be run. This query counts the number of authorization errors a student has.**



Process Disbursements

Navigation	Description
Financial Aid > Disbursement > Process Disbursements	Moves disbursements from authorized to disbursed

1. Enter New or use existing Run Control ID
2. Under Control Parameters populate the following fields:
    a. Institution
    b. Aid Year
    c. Check the Honor Disbursement Date box
    d. Check the Process Selected Terms box
3. Under Select Terms populate the Term field with the desired term code (*Note – Ensure Term Code is the same as the ones used in the previous steps)
4. Ensure the 'Active' box is checked
5. Select Run - Ensure the Process Monitor reads 'Success' and 'Posted'



Notify Student Financials that the group post is ready to be scheduled

Assign Tuition Hold Service Indicators

Tuition Hold Selection Criteria – OPTIONS (CHOOSE 1):

CTC_FA_TUIT_HOLD_SI_ASSIGN_01 – *If selected, run after Packaging*

- **Student has a FA Item Type with Accepted amount greater than zero**
- **Student has unpaid balance in Customer Account (Student Financials) greater than zero for the same term as the award**

CTC_FA_TUIT_HOLD_SI_ASSIGN_02 – *If selected, run before Packaging*

- **Sap value is not 'Not Meets' or 'Undetermined'**
- **EFC = Official**
- **Review Stats = Complete**
- **Processing Status = Ready for Packaging**
- **Student has unpaid balance in Customer Account (Student Financials) greater than zero for the same award year**

CTC_FA_TUIT_HOLD_SI_ASSIGN_03 – *If selected, run before Packaging*

- **Prompted to select students by specific checklist item and checklist status**
- **Student has unpaid balance in Customer Account (Student Financials) greater than zero for the same award year**

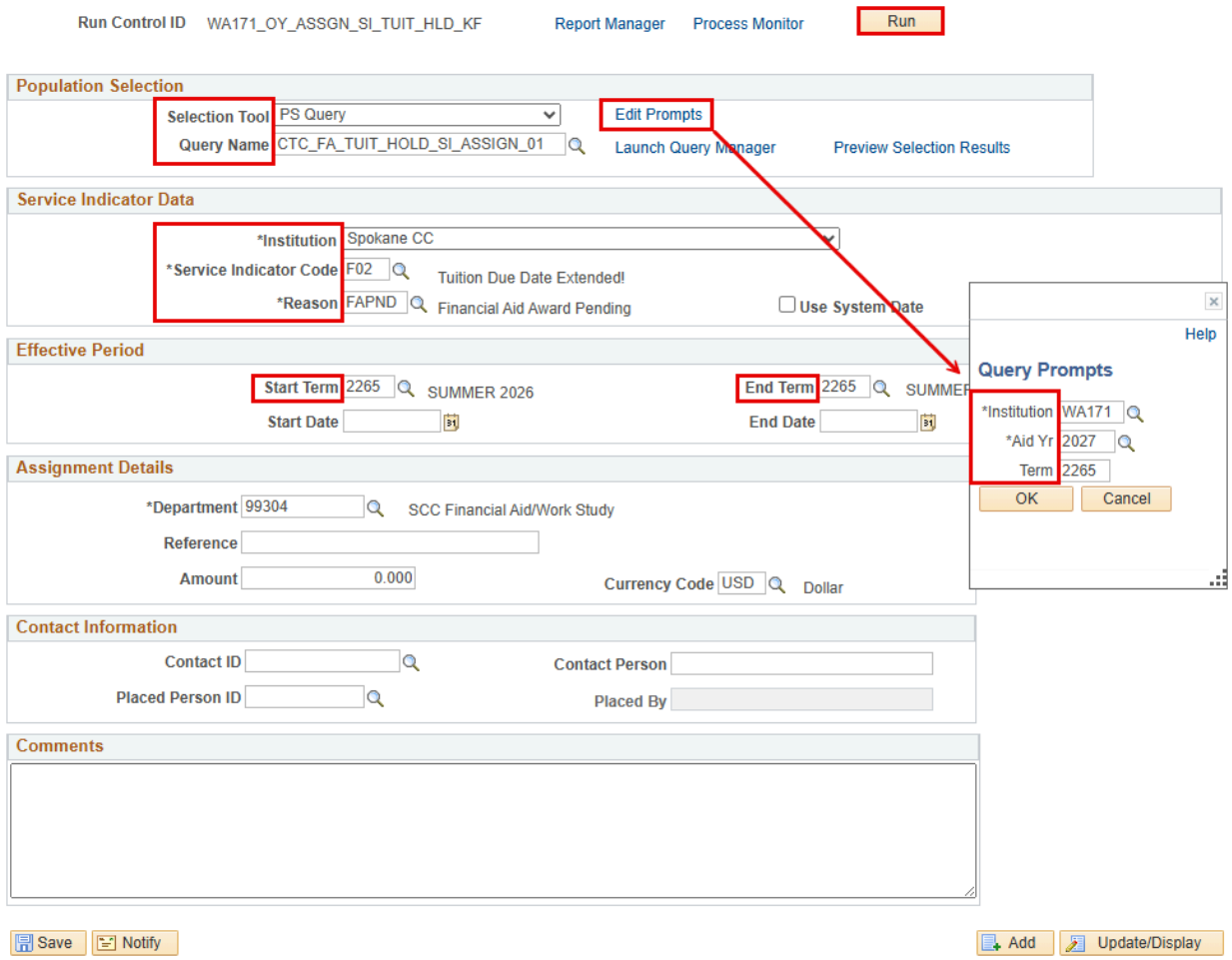
CTC_FA_TUIT_HOLD_SI_ASSIGN_04 – *If selected, run before Packaging*

- **Students Awards have been disbursed for current term**
- **Student has unpaid balance in Customer Account (Student Financials) greater than zero for the same term as the award**

Mass Assign Tuition/Class Hold Service Indicator

Navigation	Description
Campus Community > Service Indicators (Student) > Mass Assign	Assign a specific service indicator to group of students in batch

1. Enter New or use existing Run Control ID
2. Choose PS Query from the Selection Tool dropdown menu
3. Choose the desired query from the list above for the Query Name field
4. Select Edit Prompts and populate the fields and select ok
5. Under Service Indicator Data section, populate the following fields:
    a. Institution
    b. Service Indicator Code = F02 (FA Tuition/Class Hold)
    c. Reason = FAPND (Financial Aid Award Pending)
6. Under the Effective Period section, enter the desired terms in the Start Term and End Term fields
7. Select Run



A Mass Release can be run at the institution's discretion