

Objective:

The 2025-2026 Aid Year Rollover Sessions have been scheduled to start mid-December 2024 to allow FA Customer Support time to test and understand Oracle's new aid year updates through December.

FA Customer Support reviewed all the processes in Aid Year Rollover and determined areas colleges can start updating on their own before the Aid Year Rollover Sessions. In other words, Aid Year Rollover has been split into two parts: **Part 1** (everyone on their own) & **Part 2** (scheduled work session or drop-in session)

This guide, *Aid Year Rollover Part 1*, walks through the areas colleges are expected to complete **before** Day 1 of Aid Year Rollover Part 2.

The following is the schedule of AYRO Work Sessions:

College	Group		Header/Trailer	Day 1	Day 2
WA171	DG1	Spokane	Header	N/A	N/A
WA172	DG1	Spokane Falls	Header	N/A	N/A
WA140	DG2	Clark	Header	N/A	N/A
WA130	DG3A	Lower Columbia	Header	N/A	N/A
WA030	DG3A	Olympic	Header	17-Dec	18-Dec
WA110	DG3B	Pierce	Header	17-Dec	18-Dec
WA120	DG4A	Centralia	Header	21-Jan	22-Jan
WA230	DG4A	Edmonds	Header	21-Jan	22-Jan
WA040	DG5A	Skagit Valley	Header	21-Jan	22-Jan
WA300	DG3B	Cascadia	Header	21-Jan	22-Jan
WA100	DG5A	Green River	Header	21-Jan	22-Jan
WA180	DG5B	Big Bend	Header	4-Feb	5-Feb
WA250	DG5B	Bellingham Tech	Header	4-Feb	5-Feb
WA010	DG3B	Peninsula	Header	4-Feb	5-Feb
WA020	DG5C	Grays Harbor	Header	4-Feb	5-Feb
WA050	DG5C	Everett	Header	11-Feb	12-Feb
WA080	DG5C	Bellevue	Header	11-Feb	12-Feb
WA070	DG6A	Shoreline	Header	11-Feb	12-Feb
WA260	DG6A	Lake Washington Tech	Header	11-Feb	12-Feb
WA270	DG6A	Renton Tech	Header	18-Feb	19-Feb
WA290	DG6B	Clover Park Tech	Header	18-Feb	19-Feb

WA200	DG6B	Walla Walla	Header	18-Feb	19-Feb
WA240	DG6C	South Puget Sound	Header	18-Feb	19-Feb
WA090	DG4A	Highline	Trailer	25-Feb	26-Feb
WA220	DG1	Tacoma	Trailer	25-Feb	26-Feb
WA150	DG4A	Wenatchee Valley	Trailer	25-Feb	26-Feb
WA210	DG5B	Whatcom	Trailer	25-Feb	26-Feb
WA063	DG4B	North Seattle	Trailer	4-Mar	5-Mar
WA062	DG4B	Seattle Central	Trailer	4-Mar	5-Mar
WA064	DG4B	South Seattle	Trailer	4-Mar	5-Mar
WA190	DG6B	Columbia Basin	Trailer	11-Mar	12-Mar
WA280	DG6C	Bates Tech	Trailer	11-Mar	12-Mar
WA160	DG6C	Yakima Valley	Trailer	11-Mar	12-Mar

Note: The first group (WA171, WA172, WA140 & WA130) do not have a scheduled Aid Year Rollover Session as they will do Aid Year Rollover Part 2 on their own. A drop-in support session will be provided for this group.



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Process 1: Closing Out Prior Year Checklists

Identify Checklist

Colleges will use **CTC_FA_PRIOR_YR_CHCKLST_REVIEW** to determine which checklists are in an *Initiated* status for the prompted aid year. Colleges that have already closed out checklists for the previous aid year (2024), you're welcome to skip this process and move on to [Process 2](#) or run this first portion of Process 1 of reviewing checklists still in Initiated status.

NAVIGATION: Reporting Tools > Query > Query Viewer

Enter the query name **CTC_FA_PRIOR_YR_CHCKLST_REVIEW** then select **Search**

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By

Query Name

begins with

CTC_FA_PRIOR_YR_CHCKLST_REVIEW

Search

[Advanced Search](#)

Search Results

*Folder View

-- All Folders --

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule
CTC_FA_PRIOR_YR_CHCKLST_REVIEW	PY Checklist Review	Public	FINANCIAL AID	HTML	Excel	XML	Schedule

After selecting **HTML**, enter values for the following prompts then select **View Results**

Institution

Aid Year (i.e. 2024)

CTC_FA_PRIOR_YR_CHCKLST_REVIEW - PY Checklist Review

Institution

Aid Yr 2024

[View Results](#)

Open a new window to keep this page available to reference or download the results to reference in the next steps.

Edit Existing/Create New Event Definition

This step drives the information used in the *Run 3C Engine* process. If you have multiple checklists to cancel, you will return to this step multiple times.

IMPORTANT Some users may feel the urge to list all the checklist codes in this Event Definition to mass cancel all prior year checklists at once instead of repeating the process multiple times for each checklist. That will have unfavorable consequences! When you stack checklists on an Event Definition that updates the status of existing checklists, know that it will update all the listed checklists on the selected student.

Example

Student A has EBB001 in Completed status and EBB002 in Initiated status. On my Event Definition, I listed EBB001, EBB002, EBB003, etc.

When I run the Run 3C Engine process, I start with selecting students with EBB001 in *Initiated* status so the student does not pick up and nothing happens. Nice.

When I run the Run 3C Engine process selecting the students who have EBB002 in *Initiated*, the student gets picked up. As a result, the process updates both EBB001 and EBB002 to Cancelled. Not nice. ☹

NAVIGATION: Campus Community > 3C Engine > Set Up 3C Engine > Event Definition

Enter your **Academic Institution** and in the *Event ID* field put **%CAPC** to search for an existing *Event Definition* for cancelling prior year checklists.

▼ Search Criteria

Academic Institution

begins with

Event ID

begins with

%CAPC

Description

begins with

Administrative Function

begins with

☐ Include History
 ☒ Correct History
 ☐ Case Sensitive

Search Results

View All

First

1-2 of 2

Last

Academic Institution	Event ID	Description	Administrative Function
		NURS Acceptance-LPN2RN opt-in ADMA	
	FIS CAPC	C-Cancel all PPY Checklist	FINA

If the Event ID exists

Select the **Event ID** then add a new effective dated row of today

Event Definition

Academic Institution

Event ID

FISE

CAPC

Event Detail

Find | View All

First

1 of 1

Last

*Effective Date

12/01/2024

*Status

Active

*Description

C-Cancel all PPY Checklist

*Short Description

C-Canc All

*Function

FINA

Financial Aid

☐ User Selection

Variable Data Joint Rules

Update the **Checklist Code** field with the first checklist code you'd like to cancel (refer to the query results in the [Identify Checklist](#) step)

Communications

Communication Key

Detail

Comments

*Comment Category

Detail

Checklists

*Checklist Code
NSLDS Exceeds Loan Limits

Detail

☒ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100		NSLDSLnLmt		Cancelled		30	

Save

Return to Search

Notify

Add

Update/Display

Include History

Correct History

Update the *Item Status* back to **Cancelled** if it changes to a different status

Communications

Communication Key

Detail

Comments

*Comment Category

Detail

Checklists

*Checklist Code
NSLDS Exceeds Loan Limits

Detail

☒ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100		NSLDSLnLmt		Cancelled		30	

Save

Return to Search

Notify

Add

Update/Display

Include History

Correct History

Verify the two *Responsible ID* fields have the Financial Aid Office ID. One of the *Responsible ID* fields is hidden in the **Detail** link

Communications

Communication Key

Detail

Comments

*Comment Category

Detail

Checklists

*Checklist Code
NSLDS Exceeds Loan Limits

Detail

☒ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100		NSLDSLnLmt		Cancelled		30	

Save

Return to Search

Notify

Add

Update/Display

Include History

Correct History

Checklist Detail

Default Due Date	<input type="text" value="31"/>	Due Days	<input type="text" value="30"/>	
Due Amount	<input type="text"/>	Currency	<input type="text"/>	Tracking Group
Responsible ID	<input type="text" value=""/>			
Comments	<div></div>			

OK Cancel

Update *Responsible ID* field if necessary, then select **OK** and **Save**

Note: When running this process on the same day for multiple checklists, go into the page in **Correct History** mode to edit the *Checklists* section since you cannot add multiple effective dates of the same day. Always verify *Item Status* value remains as '**Cancelled**' before selecting **Save** and moving on to the *Run 3C Engine* process.

[Move on to Run 3C Engine process.](#)

If the Event ID does NOT exist

Select the **Add a New Value** tab then enter the **Academic Institution** and **Event ID** for your institution using the naming convention '**FISXXXCAPC**' where '**XXX**' represents your institution's 3-character checklist naming convention prefix (i.e. EBB for Big Bend, ECC or Centralia, etc.)

Event Definition

Find an Existing Value **Add a New Value**

*Academic Institution

*Event ID

Add

Select **Add** then complete the following areas:

Description: C-Cancel all PPY Checklist

Short Description: C-Canc All

Function: FINA

Checklist Code: The first checklist code you'd like to cancel (refer to the query results in the [Identify Checklist](#) step)

Item Code: It should auto-populate

Responsible ID: Update to the institution's Financial Aid Office ID

Item Status: Cancelled

Update Status box: Selected

Event Definition

Academic Institution

Event ID FIS CAPC

Event Detail Find | View All First 1 of 1 Last

*Effective Date 12/01/2024

*Status Active

*Description Cancel all PPY Checklist

*Short Description Cancel All

*Function FINA Financial Aid

☐ User Selection

Variable Data Joint Rules

Communications

Communication Key

Detail

Comments

*Comment Category

Detail

Checklists

*Checklist Code NSLDS Exceeds Loan Limits ☒ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	<input type="text"/>	NSLDSLnt	<input type="text"/>	Cancelled	<input type="text"/>	30	<input type="text"/>

Save Return to Search Notify Add Update/Display Include History Correct History

One of the *Responsible ID* fields is hidden in the **Detail** link

Event Definition

Academic Institution

Event ID FIS CAPC

Event Detail Find | View All First 1 of 1 Last

*Effective Date *Status

*Description

*Short Description ☐ User Selection

*Function Financial Aid Variable Data Joint Rules

Communications

Communication Key Detail

Comments

*Comment Category Detail

Checklists

*Checklist Code NSLDS Exceeds Loan Limits Detail ☒ Update Status

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	<input type="text"/>	NSLDSLnLmt	<input type="text"/>	<input type="text" value="Cancelled"/>	<input type="text"/>	30	<input type="text"/>

Save Return to Search Notify Add Update/Display Include History Correct History

Checklist Detail

Default Due Date Due Days

Due Amount Currency Tracking Group

Responsible ID Financial Aid Office

Comments

OK Cancel

Update the Responsible ID field to the institution's Financial Aid Office, select **OK** then **Save**.

Create Event 3C Groups (required for New Event Definitions)

This page is used to assign Event Definition access to specified user groups. If this step is not completed on the Event Definition, you will not be able to see it when you set up your *Run 3C Engine* Run Control ID.

NAVIGATION: Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups

Enter your **Academic Institution** and **Event ID** then select **Search**.

Note: If you moved to this page right after creating the Event Definition, this page may open without needing to enter parameters.

Event 3C Groups

Academic Institution

Event ID FISECLCAPC Cancel all PPY Checklist

Function Financial Aid

Update/Inquiry Group			
*Group	Description		
FASU	FA Super User	+	-
FAVO	FA View Only	+	-
FAVU	FA View Update	+	-

Enter the three FA 3C Security Groups to allow access to the Event Definition. The global Financial Aid 3C Security Groups are listed below.

- FASU (FA Super User)
- FAVO (FA View Only)
- FAVU (FA View Update)

Note: You are welcome to limit access to just one or two of the three FA 3C Security Groups by listing only the ones you want for the new Event Definition.

Run 3C Engine

This step will identify and update selected students, and the checklist listed in the Event Definition.

NAVIGATION: Campus Community > 3C Engine > Run 3C Engine

1. Enter a New or Existing Run Control ID
 - Run Control ID naming convention example WAXXX_PY_CHECKLIST_CNCL_YY
 - XXX = Institution's destination (i.e. 030, 160, etc.)
 - YY = User's initials
2. Under the *Process 3C's section* select the **Population Selection** check box
3. Under the *Event Selection section* populate the following fields:

Academic Institution: Your Institution

Administrative Function: FINA

Event ID: If you enter %CAPC, your Event Definition should appear given there is no typo in your Event Definition and the proper FA 3C Security Groups are assigned

3C Engine Parameters

Manage Duplicate Assignment

Run Control ID

WA PY_CHECKLIST_CNCL

Report Manager

Process Monitor

Run

Process 3Cs

☒ Population Selection
☐ Trigger Table
☐ Mass Change

Process Joint Records

☒ No Joint Processing
☐ Yes, all Joint IDs
☐ Yes, if match exists

Event Selection

Academic Institution

FINA

Administrative Function

FISE

Event ID

CANCEL all PPY Checklist

Financial Aid

Detail

Communication Key

Checklist Code

E060

Citizenship Status

Checklist Item

100 E060

Citizenship Status

Note: The current **Checklist Code** that is selected in the *Event Definition* will populate. If it's a different checklist than what you're expecting, [return to the Event Definition](#) and select the different Checklist Code.

- Under the *Population Selection* section set the *Selection Tool* to **PS Query** then enter **CTC_FA_PRIOR_YR_CHKCLST_CANCEL** for the *Query Name*

Comment Category

Population Selection

Selection Tool

PS Query

Edit Prompts

Query Name

CTC_FA_PRIOR_YR_CHKCLST_CANCEL

Launch Query Manager

Preview Selection Results

Save

Notify

Add

Update/Display

- Select the **Edit Prompts** link and enter the following parameters:

Aid Year

Institution

Checklist Code

▼

Comment Category

Population Selection

Selection Tool

PS Query

▼

Query Name

CTC_FA_PRIOR_YR_CHKCLST_CANCE

Q

Edit Prompts

Launch Query Manager

Preview Selection Results

Save

Notify

Add

Update/Display

6. Select the **Preview Selection Results** link and note some sample students for validation after the process has been run

▼

Comment Category

Population Selection

Selection Tool

PS Query

▼

Query Name

CTC_FA_PRIOR_YR_CHKCLST_CANCE

Q

Edit Prompts

Launch Query Manager

Preview Selection Results

Save

Notify

Add

Update/Display

7. Select the **Manage Duplicate Assignment** tab
8. Ensure the **Check Duplicate Checklist** check box is checked
9. Select **Variable Data: Match** and **Checklist Status: Initiated**

3C Engine Parameters

Manage Duplicate Assignment

Run Control ID

WA PY_CHECKLIST_CNCL

Report Manager

Process Monitor

Run

Duplicate Communication Check

☐ Check Duplicate Communication
 Explain

Additional Conditions to Prevent Duplicate Communication

Variable Data

▼

Communication Status

▼

Explain

Duplicate Checklist Check

☒ Check Duplicate Checklist
 Explain

Additional Conditions to Prevent Duplicate Checklist

Variable Data

Match

▼

Checklist Status

Initiated

▼

Explain

Note: The Check Duplicate Communication can be selected or unselected. This Event Definition is tied to checklists and not communications, so the checkbox has no effect on this Run Control ID.

Note 2: This Run Control ID is tied to an Event Definition that updates existing checklists so there really is no duplicate checking that occurs but just in case your Event Definition is set up incorrectly with the Update Status checkbox not selected, it's best to set these parameters to avoid additional checklists being added to the student instead of updating the existing checklist.

10. Return to the **3C Engine Parameters** tab and select **Save** then **Run**

11. Wait until the process runs to *Success* and *Posted* in the *Process Monitor* before moving on to reviewing outcomes.

Reviewing Outcomes

To verify that the students' checklists updated appropriately, use the students from the Run 3C Engine *Preview Selection Results* and confirm the checklists reflect a status of '**Cancelled**' on the *View Financial Aid Status* page. The checklist should no longer appear on the student's *To Do List* in the *Student Services Center*.

The query **CTC_FA_CANCEL_PY_CHKLST_VAL** can be used to validate the students who had their checklists cancelled. This query displays the prompted checklist for the prompted aid year, regardless of status. The query could be run before running 3C Engine as well as after as a compare to see which students were updated.

Return to [Edit Existing/Create New Event Definition](#)

Process 2: Review/Update Checklists



Some users like to work on one checklist all the way through then move on to the next one. The important thing is that you update *Checklist Item* first, then update *Checklist Table* then *Event Definition*. You'll see as you progress through the guide that those pages feed into each other.

Checklist Item Table

This page allows users to view and update checklist item descriptions. Depending on your security you may go through Set Up SACR or Campus Community to get to the page.

NAVIGATION 1: Set Up SACR > Common Definitions > Checklists > Checklist Item Table

NAVIGATION 2: Campus Community > Checklists > Set up Checklists > Checklist Item Table

For Aid Year specific Checklist Items, a user will need to insert a new effective dated row of today and update the descriptions. (Example – Parent Tax Transcript)

Even and Odd Coding has been created. Be sure to note the coding and apply to the appropriate aid year.

- **Exx###** - Checklists that start with **E** are non-aid-year specific as well as even-year specific
 - Example of a non-aid year specific checklist **Exx000 Birth Certificate**
 - Example of an even-year specific checklist **Exx032 V5 2025-2026**
- **Fxx###** – Checklists that start with **F** are odd-year specific such as **Fxx032 V5 2024-2025**

The aid year that you're updating this time around is 2025-2026 which is an even year so start with looking for your checklists that start with E.

Be sure to save changes.

Checklist Item Table

Checklist Item Code E 031

Item Code Detail Find | View All First 1 of 5 Last

*Effective Date 12/01/2024 *Status Active

*Checklist Code Descr V4 Custom 2025-2026

Short Description V4 Form 26

Item Association

Comments

Paragraph

Please submit the 2025-2026 Identity and Educational

- The 2025-2026 Identity and Statement of Educational Purpose For
- A copy of your valid unexpired government-issued

the Identity and Statement of Educational Purpose For
 finaid@whatcom.edu or in-person at Orca Central, WC
 support. Orca Central is located on the Main Floor of Heiner Center.

Fluid Field Display

Note: Do NOT use correct history. Be sure to insert a new effective dated row of today and keep previous rows active. This step will be essential for keeping a history for checklists that have been assigned with this code in previous Aid Years.

Check out [Appendix II: Solution to Checklist Error Message](#) if you run into the error message “Cannot change current or history records unless in Correction mode (15,1),” when adding a new effective dated row.

Checklist Table Setup

This setup can include function selection, display in Self Service, and checklist sequencing.

NAVIGATION 1: Set Up SACR > Common Definitions > Checklists > Checklist Table

NAVIGATION 2: Campus Community > Checklists > Set up Checklists > Checklist Table

For Aid Year specific Checklist Items a user will need to insert a new effective dated row of today and update descriptions. (Example – Parent Tax Transcript)

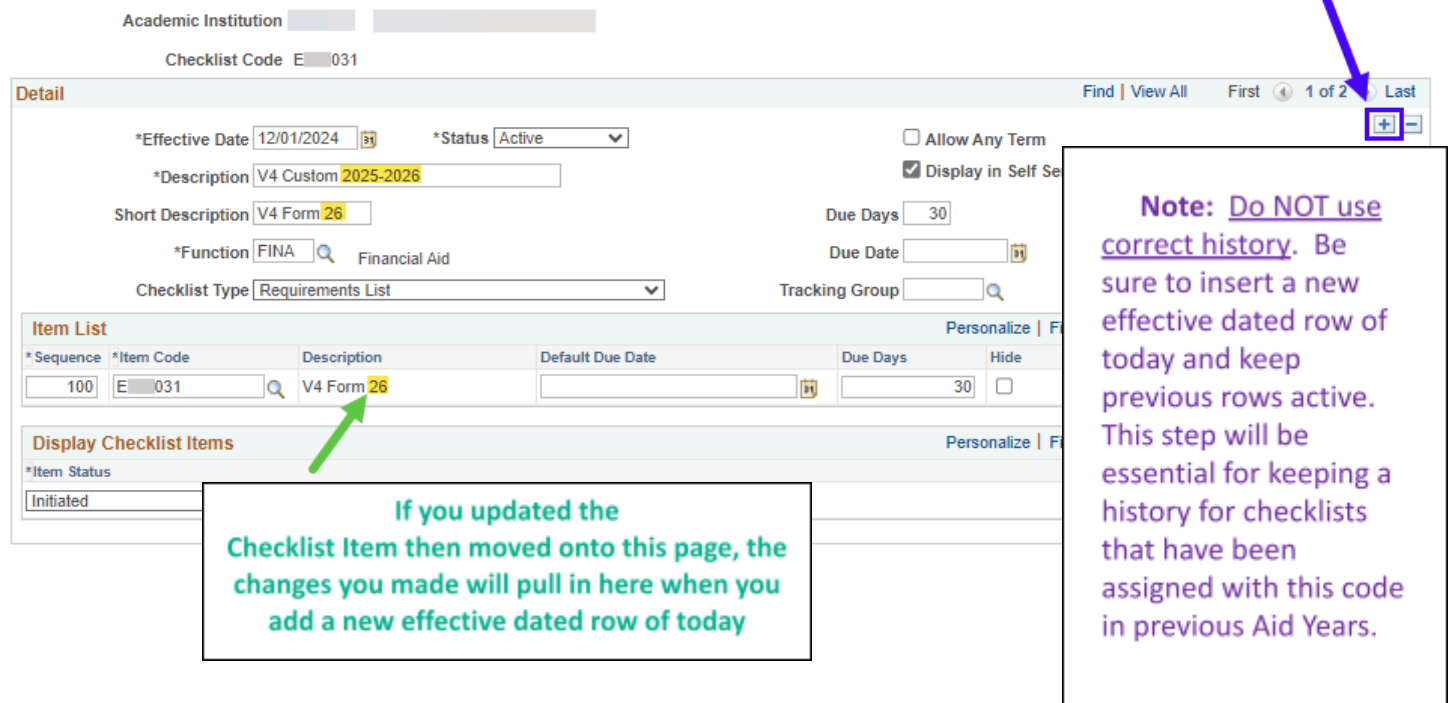
Even and Odd Coding has been created. Be sure to note the coding and apply to the appropriate aid year.

- **Exx###** - Checklists that start with **E** are non-aid-year specific as well as even-year specific
 - o Example of a non-aid year specific checklist is **Exx000 Birth Certificate**

- o Example of an even-year specific checklist is **Exx032 V5 2025-2026**
- **Fxx###** – Checklists that start with **F** are odd-year specific such as **Fxx032 V5 2024-2025**

Be sure to save changes.

Checklist Table



The screenshot shows the 'Checklist Table' interface. At the top, there are fields for 'Academic Institution' and 'Checklist Code E031'. Below this is a 'Detail' section with various input fields: '*Effective Date' (12/01/2024), '*Status' (Active), '*Description' (V4 Custom 2025-2026), 'Short Description' (V4 Form 26), '*Function' (FINA), 'Checklist Type' (Requirements List), 'Due Days' (30), and 'Due Date'. A blue arrow points to a '+' button in the top right corner of the interface. Below the detail section is an 'Item List' table with columns: *Sequence, *Item Code, Description, Default Due Date, Due Days, and Hide. The table contains one row with *Sequence 100, *Item Code E031, and Description V4 Form 26. A green arrow points to the 'Description' cell in this row. Below the table is a 'Display Checklist Items' section with a table showing *Item Status as 'Initiated'. Two callout boxes provide additional instructions: one green box says 'If you updated the Checklist Item then moved onto this page, the changes you made will pull in here when you add a new effective dated row of today', and one purple box says 'Note: Do NOT use correct history. Be sure to insert a new effective dated row of today and keep previous rows active. This step will be essential for keeping a history for checklists that have been assigned with this code in previous Aid Years.'

Event Definition

This page allows users to associate selection criteria to certain checklist items and communications for 3C engine to assign or update. **Checklist Item and Checklist Table must be updated before updating the associated event definition.**

NAVIGATION: Campus Community > 3C Engine > Set Up 3C Engine > Event Definition

For Aid Year specific Event Definitions a user will need to add an effective dated row of today and update descriptions. (Example – Verification and Tax Documents)

Even and Odd Coding has been created. Be sure to note the coding and apply to the appropriate aid year.

- **Exx###** - Event IDs that start with **E** are non-aid-year specific as well as even-year specific
 - o Example of a non-aid year specific Event ID is **FISExx000I I-Birth Certificate**
 - o Example of an even-year specific Event ID is **FISExx032I I-Aggregate 2025-2026**

- **Fxx###** – Event IDs that start with **F** are odd-year specific such as **FISFxx0321 I-Aggregate 2024-2025**

Be sure to save changes.

Event Definition

Academic Institution

Event ID FISE 0311

Find | View All First 1 of 2 Last

*Effective Date 12/01/2024 *Status Active

*Description I-Custom 2025-2026

*Short Description I-CstV26

*Function FINA

Communications

Communication Key

Comments

*Comment Category

Checklists

*Checklist Code E 031 V4 Custom 2025-2026

Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days
100	E 031	V4 Form 26		Initiated		3

If your FA office has an EMPLID, update the Responsible ID on this page as well as the Checklist Detail page which you can get to by selecting the Detail link.

Note: Do NOT use correct history. Be sure to insert a new effective dated row of today and keep previous rows active. This step will be essential for keeping a history for checklists that have been assigned with this code in previous Aid Years.

If you updated the Checklist Item and Checklist Table, then moved onto this page, the changes you made will pull in here when you add a new effective dated row of today



There are not many waive Event IDs so it's easy to forget about them, but don't forget to update the few **Aid Year specific waive Event IDs!** For example, **FISFxx025W W-Parent Tax Transcript 2023**

Check out [Appendix III: Creating an FA Office EMPLID](#) if your office does not have an FA Office EMPLID and you will be working with your Student Records office to create one.

Process 3: Communications Review



Most FA communications have merge fields in areas that mention a specific aid year or term so that the communications could be used for any aid year or term. Common communications that require updating are ones that have links to websites, forms and policies.

Create BIP Report Definitions

This page during Aid Year Rollover is used to update communication templates.

NAVIGATION: Reporting Tools > BI Publisher > Create BIP Report Definitions

Change the *Search by* to **Report Category ID** then type 'FA' which will populate a list of colleges to select from. Select your college then select the *Search* button.

Report Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value | Add a New Value

*Search by Report Category ID =

☐ Include History ☐ Correct History

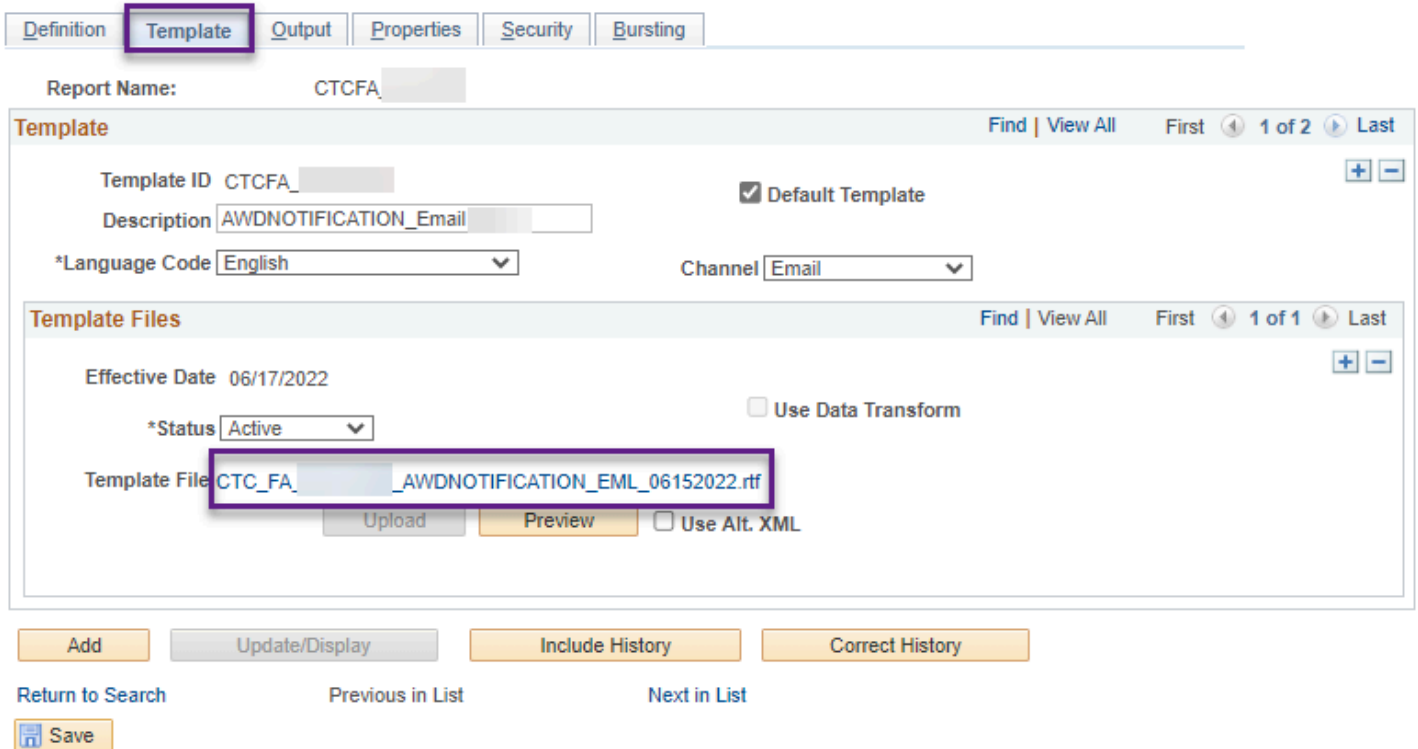
Search Advanced Search

Find an Existing Value | Add a New Value

Report Category ID	Description	Object Owner ID
FA BATES TECH	Bates Tech FA Admin	Fin Aid
FA BELLEVUE	Bellevue FA Admin	Fin Aid
FA BELLINGHAM	Bellingham FA Admin	Fin Aid
FA BIG BEND CC	Big Bend CC FA Admin	Fin Aid
FA CASCADIA CC	Cascadia CC FA Admin	Fin Aid
FA CENTRALIA	Centralia College FA Admin	Fin Aid
FA CLARK CC	Clark FA Admin	Fin Aid
FA CLOVER PARK	Clover Park Tech FA Admin	Fin Aid
FA COLUMBIA BASIN	Columbia Basin CC FA Admin	Fin Aid
FA EDMONDS	Edmonds College FA Admin	Fin Aid
FA EVERETT CC	Everett CC FA Admin	Fin Aid
FA GRAYS HARBOR	GRAYS HARBOR FA Admin	Fin Aid
FA GREEN RIVER CC	Green River CC FA Admin	Fin Aid
FA HIGHLINE	Highline College FA Admin	Fin Aid
FA LAKE WASHINGTON	LW Tech FA Admin	Fin Aid
FA LOWER COLUMBIA	Lower Columbia CC FA Admin	Fin Aid
FA NORTH SEATTLE	North Seattle FA Admin	Fin Aid

Note: You can continue typing after FA to narrow down to a smaller list of colleges to select from. For example, typing "FA E" will limit the results to FA EDMONDS and FA EVERETT CC. 😊

Once the communication to review is chosen, select the **Template** tab, then the **Template File** link



Definition **Template** Output Properties Security Bursting

Report Name: CTCFA_

Template Find | View All First 1 of 2 Last

Template ID CTCFA_ ☐ Default Template

Description AWDNOTIFICATION_Email

*Language Code English Channel Email

Template Files Find | View All First 1 of 1 Last

Effective Date 06/17/2022 ☐ Use Data Transform

*Status Active

Template File CTC_FA_AWDNOTIFICATION_EML_06152022.rtf

Upload Preview ☐ Use Alt. XML

Add Update/Display Include History Correct History

Return to Search Previous in List Next in List

Save

To update the template:

- Open up the Word RTF template you downloaded from PS
- Make your changes avoiding the merge fields indicated in grey
- Save As the revised template with a new name
 - Including the date the changes were made in the name is a best practice
 - Keep the format Word RTF
 - Avoid using fancy fonts as PS does not accept all fonts. If you upload your template and get an error message indicating the template cannot be processed, you may be using an unacceptable font
- Insert a new effective dated row of today under the *Template Files* section
- Update the *Status* from to **Active**
- Select **Upload** to add your updated template
- Select Save

Note: If the communication you are reviewing has both a *Channel: Email* and *Channel: Printer*, make sure to update both templates.

With the changing from EFC to SAI in the 2024-2025 aid year, Aid Year specific have been created for each college. With the Even-Year letter not having certain data elements, such as SAI, that populates in the current Odd-Year global Award Notification template, you will need to download your Odd-Year letter and upload as a new template for your Even-Year and include any additional updates in the text of the letter as needed.

11/29/2023

Process 4: Define Financial Aid Year

NAVIGATION: Set Up SACR > Product Related > Financial Aid > Aid Year > Define Financial Aid Years

Complete the new aid year row with the *Start Date* and *End Date* for the Academic Year then select **Save**.

- Be careful of typos (last AYRO there were a couple colleges that made a typo on End Date, specifically the year)
- Be sure that the date range **includes all four terms** included in the Academic Year

Financial Aid Year

Academic Institution WA

Aid Year Setup
Find | View All
First 1-8 of 14 Last

*Aid Year	Description	Short Desc	Academic Year		
			Start Date	End Date	
2026	2025-2026 Financial Aid Year	2025-2026			+ -
2025	2024-2025 Financial Aid Year	2024-2025	07/01/2024	06/18/2025	+ -
2024	2023-2024 Financial Aid Year	2023-2024	07/03/2023	06/14/2024	+ -
2023	2022-2023 Financial Aid Year	2022-2023	07/05/2022	06/16/2023	+ -
2022	2021-2022 Financial Aid Year	2021-2022	07/01/2021	06/17/2022	+ -
2021	2020-2021 Financial Aid Year	2020-2021	07/01/2020		
2020	2019-2020 Financial Aid Year	2019-2020	07/01/2019		
2019	2018-2019 Financial Aid Year	2018-2019	07/02/2018		

Save
Return to Search
Notify

These dates are used by the DL Origination process and populates the Academic Year values in the COD XML file

Note: Headers and Trailers will have different dates

Process 5: WCG and College Bound

WCG Aid Year Review and Update

Equation Processing Options

NAVIGATION: Set Up SACR > Product Related > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > Equation Processing Options

Enter your **Academic Institution** and desired **Aid Year** then select **Search**

Equation Processing Options


Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

*Academic Institution = ▼ 🔍

*Aid Year = ▼ 2026 🔍

Search Clear Basic Search  Save Search Criteria

Select the following then save:

Application Prompt ID: Fin Aid SNG Evaluation

Equation Name: CTCFAWCGELIG

Equation Processing Options

Academic Institution: WA
Aid Year: 2026 2025-2026 Financial Aid Year

Make sure to save changes

Mapping Details Find | View All First 1 of 1 Last

Application Prompt ID: Fin Aid SNG Evaluation

Equation Name: CTCFAWCGELIG Determine WCG Eligibility

Save Return to Search Notify

WCG Setup

NAVIGATION: Set Up SACR > Product Related > Financial Aid > CTC Custom > CTC Interfaces > WA College Grant > WCG Setup



WCG and CBS pages are add-ons to PS so they do not get captured during Aid Year Setup rollover processes. For these pages, colleges will copy the existing numbers from the prior aid year to the new aid year. Tables will need to be updated when new figures are released from WSAC.

The following steps are required for updating WCG tables for the upcoming aid year

WCG Awards Setup

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

*Academic Institution =

*Aid Year = 2025

Search Clear Basic Search Save Search Criteria

Open the page for the **current aid year** to copy to the upcoming aid year

Awards Amounts Table tab

Awards Amounts Table

MFI Setup Table

Academic Institution
Aid Year 2025

COPY

Award Amounts

Personalize | Find |

First 1-4 of 4 Last

	MFI Percent	NonBas Award Amount	Bas Award Amount		
1	65	4763	7610	+	-
2	70	2382	3805	+	-
3	75	1167	1864	+	-
4	100	476	761	+	-

Save

Return to Search

Notify

Selecting Copy will open the page below

Enter the following in the **Copy To** fields then select **OK**:

- Academic Institution
- Aid Year

Copying Setup from one aid year to another

Copy From

Copy To

Academic Institution:
Aid Year: 2025

Academic Institution:
Aid Year: 2026

OK

Cancel



Move on to the MFI Setup Table tab and perform the same steps

MFI Setup Table tab




Awards Amounts Table **MFI Setup Table**

Academic Institution

Aid Year 2025 **COPY**

MFI Setup Personalize | Find | View All |   First 1-10 of 80 Last

	Family Size	MFI Percent	Income CutOff		
1	1	65	40500.00	+	-
2	2	65	53000.00	+	-
3	3	65	65500.00	+	-
4	4	65	78500.00	+	-
5	5	65	91000.00	+	-
6	6	65	103500.00	+	-
7	7	65	105500.00	+	-
8	8	65	108000.00	+	-
9	9	65	110500.00	+	-
10	10	65	112500.00	+	-



 Save  Return to Search  Notify

Select the **Copy** button

Enter the following in the **Copy To** fields then select **OK**:

- Academic Institution
- Aid Year

Copying Setup from one aid year to another

Copy From	Copy To
Academic Institution: <input type="text"/>	Academic Institution: <input type="text"/> 
Aid Year: 2025	Aid Year: 2026 
<div>OK Cancel</div>	

Select **Save**

Awards Amounts Table
MFI Setup Table

Academic Institution

Aid Year 2025
COPY

MFI Setup
Personalize | Find | View All | First | 1-10 of 80 | Last

	Family Size	MFI Percent	Income CutOff		
1	1	65	40500.00	+	-
2	2	65	53000.00	+	-
3	3	65	65500.00	+	-
4	4	65	78500.00	+	-
5	5	65	91000.00	+	-
6	6	65	103500.00	+	-
7	7	65	105500.00	+	-
8	8	65	108000.00	+	-
9	9	65	110500.00	+	-
10	10	65	112500.00	+	-

Save
Return to Search
Notify

After copying is complete, you will see values in the 2026 aid year WCG tables.

Awards Amounts Table
MFI Setup Table

Academic Institution

Aid Year 2026
COPY

Award Amounts
Personalize | Find | First | 1-

	MFI Percent	NonBas Award Amount	Bas Award Amount
1	65	4763	7610
2	70	2382	3805
3	75	1167	1864
4	100	476	761

Save
Return to Search
Notify

Watch for 2025-2026 Award Amounts table updates from WSAC -- Be sure to update this table accordingly prior to awarding!

They are estimates and the values can change so it's up to the college to wait for the final numbers or update now and update again later should the values change.

CBS Aid Year Review and Update

College Bound Setup

NAVIGATION: Set Up SACR > Product Related > Financial Aid > CTC Custom > CTC Interfaces > College Bound Scholarship > College Bound Setup



WCG and CBS pages are add-ons to PS so they do not get captured during Aid Year Setup rollover processes. For these pages, colleges will copy the existing numbers from the prior aid year to the new aid year. Tables will need to be updated when new figures are released from WSAC.

The following steps are required for updating CBS table for the upcoming aid year

College Bound Setup


Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

*Academic Institution =

*Aid Year =


Search Clear Basic Search  Save Search Criteria



Open the page for the **current aid year** to copy to the upcoming aid year

Maximum CBS Awards By Degree Levels

Institution

Aid Year 2024-2025 Financial Aid Year



Award Amounts Find | View All |   First 1-2 of 2 Last

Degree Level	Amount		
1 BAS	8110	<input type="button" value="+"/>	<input type="button" value="-"/>
2 Non-BAS	5263	<input type="button" value="+"/>	<input type="button" value="-"/>



Selecting Copy will open the page below

Enter the following in the **Copy To** fields then select **OK**:

- Academic Institution
- Aid Year

Copying Setup from one aid year to another

Copy From	Copy To
Academic Institution: <input type="text"/>	Academic Institution: <input type="text"/>
Aid Year: 2025	Aid Year: 2026
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Select **Save**

Maximum CBS Awards By Degree Levels

Institution

Aid Year 2025 2024-2025 Financial Aid Year

Award Amounts Find | View All | | First 1-2 of 2 Last

	Degree Level	Amount		
1	BAS	8110	<input type="button" value="+"/>	<input type="button" value="-"/>
2	Non-BAS	5263	<input type="button" value="+"/>	<input type="button" value="-"/>

After copy is complete, you will see values in the new aid year WCG tables.







Maximum CBS Awards By Degree Levels

Institution


Aid Year  2026


2025-2026 Financial Aid Year

[Copy](#)

Award Amounts			
Find View All   First  1-2 of 2 			
	Degree Level	Amount	
1	<input type="text" value="BAS"/>	<input type="text" value="8110"/>	
2	<input type="text" value="Non-BAS"/>	<input type="text" value="5263"/>	

 Save

 Return to Search

 Notify

Watch for 2025-2026 Award Amounts table updates from WSAC -- Be sure to update this table accordingly prior to awarding!

They are estimates and the values can change so it's up to the college to wait for the final numbers or update now and update again later should the values change.

Appendix I: Setup Review Queries

List of queries mentioned throughout this guide as well as other helpful ones.

Query	Description
QCS_FA_CHKLST_DESCRP	List of all FINA checklists and their descriptions.
CTC_FA_LC_AYRO_CHECKLIST_ITEMS	List of all E and F checklists and their descriptions.
CTC_FA_LC_AYRO_3CEVENT_DEFINED	Allows users to query the Event IDs and review the values in order to verify the setup.
CTC_FA_LC_AYRO_3C_EVENT_GROUPS	Allows users to query the Event 3C Groups and review the values in order to verify the setup.
QCS_CC_COMM_INST	List of Communications for the prompted institution.

Appendix II: Solution to Checklist Error Message

The Issue

You attempt to add a row to the Checklist Item, and the below error message “Cannot change current or history records unless in Correction mode” comes up immediately before you can make any changes.

Message

Cannot change current or history records unless in Correction mode. (15,1)

You have attempted to change a record that is effective dated, and the record contains an effective date that makes it either the current record or a historical record. Either use the Add (+) button to create a new record with a future effective date, or change your mode to Correction.

OK

The Solution

If you know you have Correct History access:

1. Back out of the Checklist Item
2. Click the Correct History checkbox
3. Add a row and move forward with your adjustments (Make sure not to make changes to preexisting rows.)

***** This workaround should only be used when you see this error message. Otherwise, as a general rule, Correct History mode should not be used to make changes to Checklist Items. *****

Checklist Item Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Search Criteria

Checklist Item Code

begins with

E026

Description

begins with

☐ Include History
 ☒ **Correct History**
☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All

First

1-3 of 3

Last

Checklist Item Code	Description
E026	FA Parent W2 2019
E026	FA Parent W2 2021
E026	Parent W2 2019

If you need Correct History access (you are not able to check the box in the screenshot above):

1. Request that your local security team to grant you the security role ZC FA Local Configuration
2. Follow the steps above.

*****Correct History access is typically only granted to FA Directors and super users, and this level of access should be granted sparingly. *****

[Return to Checklist Item Table section](#)

Appendix III: Creating an FA Office EMPLID

The Issue

Using an actual staff member's EMPLID leads to a large volume of calls and emails directed at the assigning person. In response, colleges have asked how to set up a "Financial Aid Office" EMPLID that can be used instead; similar to what Spokane and TCC use in their Event Definitions.

****Event Definitions will need to be updated with the new FA Office EMPLID prior to activating the ISIR Jobset for the new aid year****

The Solution

Step 1: Work with your local Records team to create a new "Financial Aid Office" EMPLID.

Below please find two screenshots with examples of the set up for Add/Update Person AND a search on the **"Financial Aid Office" EMPLID containing NO SECURITY ROLES WHATSOEVER**. This record is to be created solely to display contact information tied to the assigned checklist item. **NO ONE should have any ability to log into the account.**

Example of Add/Update Person screen values:

Name: Financial Aid XXX Office

Date of Birth: 01/01/1901

SSN: All XXX's

Phone Number: Campus Phone Number you want the student to call (Financial Aid Office #)

Email: Campus Email with your desired email address (Financial Aid Office email address)

Biographical Details | Addresses | Regional | Personal

Financial Aid Office Spokane Falls Community College 201272292 Names

Person Information

Date of Birth 01/01/1901 Birth Information Campus ID

Biographical History Find | View All First 1 of 1 Last

*Effective Date 09/01/2015

*Marital Status Unknown

*Sex Unknown

As of 09/01/2015

Legal Definition of Sex

National ID Personalize | Find | View All First 1 of 1 Last

*Country USA

*National ID Type Social Security Number

National ID XXX-XX-XXXX

Primary

Add

Contact Information Find | View All First 1 of 1 Last

Addresses No current addresses exist. Addresses

Phone

*Type	*Phone	Ext	Country	Preferred
Campus	509/533-3550			<input checked="" type="checkbox"/>

Add

Email

*Email Type	*Email Address	Preferred
Campus	sfcc.finaid@sfcc.spokane.edu	<input checked="" type="checkbox"/>

Add

Visa/Permit Data Citizenship

Example of User ID Security Access (No Roles at all):

User Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Search Criteria

User ID begins with 201272292

Description begins with

Search

Clear

Basic Search



Save Search Criteria

No matching values were found.

Step 2: Update Event Definitions with the new Responsible ID

Return to your Event Definition Configuration page and add a new effective dated row of today then enter the newly created Responsible ID in the two Responsible ID fields.

Please DO NOT use Correct History, and be sure to leave previous rows as "Active". This will be essential for keeping a history for checklists that have been assigned with this code in previous aid years.

NAVIGATION: Nav Bar > Navigator > Campus Community > 3C Engine > Set Up 3C Engine > Event Definition

Event Definition

Academic Institution Tacoma CC

Event ID FISFTC0271

Event Detail Find | View All First 6 of 6 Last

*Effective Date 12/13/2021 *Status Active

*Description I-Stdnt/Spouse TaxTrmscpt2020

*Short Description I-STax20 ☐ User Selection

*Function FINA Financial Aid Variable Data Joint Rules

Communications

Communication Key Detail

Comments

*Comment Category Detail

Checklists

*Checklist Code FTC027 Stdnt/Spouse Tax Trmscpt 2020 Detail ☐ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	FTC027	STax18	201272057	Initiated		30	

The first Responsible ID field is on the Event Definition page. Enter your newly created "Financial Aid Office" EMPLID in that field.

Event Definition

Academic Institution Tacoma CC

Event ID FISFTC0271

Event Detail Find | View All First 1 of 7 Last

*Effective Date 02/17/2022 *Status Active

*Description I-Stdnt/Spouse TaxTrmscpt2020

*Short Description I-STax20 ☐ User Selection

*Function FINA Financial Aid Variable Data Joint Rules

Communications

Communication Key Detail

Comments

*Comment Category Detail

Checklists

*Checklist Code FTC027 Stdnt/Spouse Tax Trmscpt 2020 Detail ☐ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	FTC027	STax20		Initiated		30	



Aid Year Rollover Part 1

The second Responsible ID fields is hidden in the **Detail link**. Enter your newly created "Financial Aid Office" EMPLID then click OK.

Checklist Detail

Default Due Date	<input type="text"/>	Due Days	<input type="text" value="30"/>	
Due Amount	<input type="text"/>	Currency	<input type="text"/>	Tracking Group
Responsible ID	<input type="text"/>			
Comments	<input type="text"/>			

OK Cancel

After completing both areas, select Save.

[Return to Event Definition section](#)