



Overview

Per the *Financial Aid Maintenance List* on Mass Packaging change requests, a solution to package Washington College Grant (WCG) and College Bound Scholarship (CBS) based on enrollment level (Financial Aid Load) was requested.

In Scope for this new design

- WCG amounts for each term automatically pro-rates depending on the FA Load for the term.
- CBS amounts for each term automatically pro-rates depending on the FA Load for the term.
- WCG/CBS packages for students who have limited WCG/CBS terms of eligibility and DO NOT have a break in enrollment within the aid year

Out of Scope for this new design

Students in the cases outlined below are not in scope and will remain requiring manual adjustments by staff:

- WCG/CBS correctly packaging students who have limited WCG/CBS terms of eligibility and breaks in enrollment within the aid year
- CBS packaging correct amount for BAS students (this is a separate change request not yet addressed)

The following solution design document contains detailed info about the new design.



Solution Design -
WCG Enrollment-Based

If you would like to continue packaging full-time WCG regardless of FA Load and budget, you will not make the changes outlined in this guide.



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Review/Update Disbursement Split Codes

Before you proceed updating the 2024 packaging plans, confirm the required disbursement split codes and split code formulas exist and are accurate for your college. We noticed some colleges were missing a few required split codes and split code formulas so we created them for you for the 2024 aid year but we still ask that you review them to make sure nothing is amiss.

Disbursement Split Codes

You can run the **CTC_FA_GC_AYRO_DISB_SPLIT_CODE** to get a list of all your split codes or navigate to the Disbursement Split Codes page.

NAVIGATION: Set Up SACR > Product Related > Financial Aid > Awards > Disbursement Split Codes

Disbursement Split Code

Institution

Career UGRD Undergraduate

Aid Year 2024 2023-2024

Disbursement Plan 09 Summer-Fall-Winter-Spring

[Copy](#)

*Split Code	*Description	Short Description		
AY	Fall-Winter-Spring	Fa-Wi-Sp	+	-
F1	Fall	Fall	+	-
F2	Fall-Winter	Fa-Wi	+	-
F5	Fall-Spring	Fa-Sp	+	-
S1	Spring	Spring	+	-
U1	Summer	Summer	+	-
U2	Summer-Fall	Su-Fa	+	-
U3	Summer-Fall-Winter	Su-Fa-Wi	+	-
U4	Sumr-Fall-Winter-Spring	SuFaWiSp	+	-
U5	Summer-Fall-Spring	Su-Fa-Sp	+	-
W1	Winter	Winter	+	-

[Save](#)
[Return to Search](#)
[Notify](#)

Header colleges will need the following disbursement split codes:

Disbursement Plan	Disbursement Split Code
Fall-Winter-Spring	Fall
	Winter
	Spring
Fall-Winter	Fall
	Winter
Fall Only	Fall
Winter-Spring	Winter
	Spring
Winter Only	Winter
Spring Only	Spring
Summer Only	Summer
	Summer
Summer-Fall-Winter-Spring	Fall
	Winter
	Spring
	Summer
Summer-Fall-Winter	Fall
	Winter
	Summer
Summer-Fall	Fall
	Fall

Note: You may have other Disbursement Plans such as Fall-Spring, Summer-Winter, etc. but there is no packaging plan designed for those Disbursement Plans.

Header college's 10 packaging plans

View All			First	1-10 of 10	Last
Academic Institution	Aid Year	Academic Career	Packaging Plan ID	Description	
WA	2024	UGRD	FA-WI	Fall/Winter	
WA	2024	UGRD	FA-WI-SP	Fall/Winter/Spring	
WA	2024	UGRD	FALL ONLY	Fall Only	
WA	2024	UGRD	SPRG ONLY	Spring Only	
WA	2024	UGRD	SU-FA	Summer/Fall	
WA	2024	UGRD	SU-FA-WI	Summer/Fall/Winter	
WA	2024	UGRD	SUFAWISP	Summer/Fall/Winter/Spring	
WA	2024	UGRD	SUMR ONLY	Summer Only	
WA	2024	UGRD	WI-SP	Winter/Spring	
WA	2024	UGRD	WINTR ONLY	Winter Only	

Trailer colleges will need the following disbursement split codes:

Disbursement Plan	Disbursement Split Code
Fall-Winter-Spring	Fall Winter Spring
Fall-Winter	Fall Winter
Fall Only	Fall
Winter-Spring	Winter Spring
Winter Only	Winter
Spring Only	Spring
Summer Only	Summer
Fall-Winter-Spring-Summer	Fall Winter Spring Summer
Winter-Spring-Summer	Winter Spring Summer
Spring-Summer	Spring Summer

Note: You may have other Disbursement Plans such as Fall-Spring, Winter-Spring, etc. but there is no packaging plan designed for those Disbursement Plans.

Trailer college's 10 packaging plans

View All				First	1-10 of 10	Last
Academic Institution	Aid Year	Academic Career	Packaging Plan ID	Description		
WA:	2024	UGRD	FA-WI	Fall/Winter		
WA:	2024	UGRD	FA-WI-SP	Fall/Winter/Spring		
WA:	2024	UGRD	FALL ONLY	Fall Only		
WA:	2024	UGRD	FAWISPSU	Fall/Winter/Spring/Summer		
WA:	2024	UGRD	SP-SU	Spring/Summer		
WA:	2024	UGRD	SPRG ONLY	Spring Only		
WA:	2024	UGRD	SUMR ONLY	Summer Only		
WA:	2024	UGRD	WI-SP	Winter/Spring		
WA:	2024	UGRD	WI-SP-SU	Winter/Spring/Summer		
WA:	2024	UGRD	WNTR ONLY	Winter Only		



Disbursement Split Cd Formula

You can run the **CTC_FA_GC_AYRO_DISB_SPLIT_CODE** to get a list of all your split code formulas or navigate to the Disbursement Split Codes page.

NAVIGATION: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Disbursement Split Cd Formula

Disbursement Split Formula

Institution

Aid Year 2024

2023-2024 Financial Aid Year

Disbursement Plan 09

Summer-Fall-Winter-Spring

Career UGRD

Undergraduate

Split Code W1

Winter

Copy

Even Split Option

Total Disbursement: 100.00

Disbursement Split Percentages				
Disbursement ID	Description	Term	Disbursement Date	Percentage
01	Summer Disbursement 1	2235	06/23/2023	0.00
02	Fall Disbursement 1	2237	09/10/2023	0.00
03	Winter Disbursement 1	2241	12/24/2023	100.00
04	Spring Disbursement 1	2243	03/22/2024	0.00

Header colleges - review each disbursement split code that is listed and confirm 100% of the aid is going into the correct term. For example, a Summer-Fall-Winter-Spring Disbursement Plan with Winter Split Code should have 100% in Winter Term.

Disbursement Plan	Disbursement Split Code
	Fall
Fall-Winter-Spring	Winter
	Spring
Fall-Winter	Fall
	Winter
Fall Only	Fall
Winter-Spring	Winter
	Spring
Winter Only	Winter
Spring Only	Spring
Summer Only	Summer
	Summer
Summer-Fall-Winter-Spring	Fall



WCG & CBS Enrollment-Based Packaging Setup

Summer-Fall-Winter	Winter
	Spring
	Summer
	Fall
Summer-Fall	Winter
	Summer
	Fall

Trailer colleges will review each disbursement split code that is listed and confirm 100% of the aid is going into the correct term. For example, a Fall-Winter-Spring-Summer Disbursement Plan with Winter Split Code should have 100% in Winter Term.

Disbursement Plan	Disbursement Split Code
Fall-Winter-Spring	Fall
	Winter
	Spring
	Fall
Fall-Winter	Winter
Fall Only	Fall
Winter-Spring	Winter
	Spring
Winter Only	Winter
Spring Only	Spring
Summer Only	Summer
	Fall
	Winter
Fall-Winter-Spring-Summer	Spring
	Summer
	Winter
Winter-Spring-Summer	Spring
	Summer
	Spring
Spring-Summer	Summer
	Spring



Review/Update WCG and College Bound Setup Tables

With the existing WCG/CBS packaging design WCG/CBS annual amounts that are not divisible by 3 needed to be adjusted by \$1 on the WCG Setup and CBS Setup pages. **This new design eliminates the need for the \$1 adjustments in setup.**

Note: If you did not make any dollar adjustments to amounts on the WCG/CBS tables for 2024 aid year, you do not have to run a re-calc on your students until WSAC releases the 2023-2024 WCG/CBS award amounts and you update the table with those new values.

WCG Setup

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

Enter the 2024 aid year and review the WCG award amounts. If you had adjusted some WCG amounts by a dollar to make them divisible by three, adjust them back to the original amounts given by WSAC.

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 = 2024

Academic Institution

Aid Year 2024

Award Amounts			Personalize	Find				First	1-5 of 5	Last
	MFI Percent	NonBas Award Amount	Bas Award Amount							
1	60	4466	7161					+	-	
2	65	2680	4297					+	-	
3	70	2233	3581					+	-	
4	75	1094	1754					+	-	
5	100	447	716					+	-	

Watch
<https://wsac.wa.gov/FAA-resources>
for 2023-2024 Award
Amounts table updates from
WSAC



College Bound Setup

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

Enter the 2024 aid year and review the CBS award amounts. If you had adjusted some CBS amounts by a dollar to make them divisible by three, adjust them back to the original amounts given by WSAC.

College Bound Setup

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

▼ Search Criteria

Academic Institution =

Aid Year =

Maximum CBS Awards By Enrollment Levels

Institution

Aid Year

Award Amounts

Find | View All | |

First 1-4 of 4 Last

	Level	Amount		
1	3/4-Time ▼	3725	+	-
2	Full-Time ▼	4966	+	-
3	Half-Time ▼	2483	+	-
4	Qter-Time ▼	1242	+	-

Watch
<https://wsac.wa.gov/FAA-resources>
for 2023-2024 Award
Amounts table updates from
WSAC

After adjusting both WCG and CBS tables back to the original award amounts given by WSAC, run the recalculation process mentioned on **p.11** of the *WCG and CBS Business Processing Guide*

<https://ctclinkreferencecenter.ctclink.us/m/92427/l/1375615-9-2-wcg-and-cbs-processing-business-process-guide>

Updating Packaging Plans

This section will walk you through updating each type of packaging plan but we will start with an overview of what will be happening.

There are four types of packaging plans: one-term (i.e. FALL ONLY), two-term (i.e. FA-WI), three-term (i.e. FA-WI-SP) and four-term (i.e. FA-WI-SP-SU).

The number of WCG item-types in the packaging plan will depend on the number of terms to award in that packaging plan:

- Four-term packaging plans will have WCG listed four times in the packaging plan
- Three-term packaging plans will have WCG listed three times in the packaging plan
- Two-term packaging plans will have WCG listed twice in the packaging plan
- One-term packaging plans will have WCG listed once in the packaging plan

The number of CBS item-types in the packaging plan will depend on the number of terms to award in that packaging plan times two due to having 'Okay to Pay' and 'Okay to Award' eligibility statuses:

- Four-term packaging plans will have CBS listed eight times in the packaging plan
- Three-term packaging plans will have CBS listed six times in the packaging plan
- Two-term packaging plans will have CBS listed four times in the packaging plan
- One-term packaging plans will have CBS listed twice in the packaging plan

There are 20 new equation engines in production:

- 4 new WCG selection equation engines
- 4 new WCG award amount equations
- 4 new CBS 'Okay to Award' selection equation engines
- 4 new CBS 'Okay to Pay' selection equation engines
- 4 new CBS award amount equations

The equation engines will be placed in specific locations within the packaging plans.



WCG & CBS Enrollment-Based Packaging Setup

Running the **CTC_FA_PACKAGING_PLANS** query and downloading the results into a spreadsheet and planning out the Sequence Numbers can be helpful! 😊 Not all college's sequences are spread out by 10s between item-types like the examples provided. There are colleges who have sequence numbers right next to each other like sequence number 60 for CBS 'Okay to Pay' and sequence number 61 for CBS 'Okay to Award.' In cases like those, the college will need to adjust the Sequence Numbers of other item-types within that packaging plan.

Example of a college planning out the sequence number for the new WCG and CBS rows that will be added for a four-term packaging plan.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	Institut	Aid	Care	Plan ID	Stat	Plan Ord	Selection	Sequen	Item Type	Descr	Selection	Item Type M	Item Type Max	Award Acti	D
2		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	10	911000000000	Federal Pell Grant	CTCFASBSP	1	9999999	Offer/Acc	C
3		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	20	912000000000	WA College Grant	CTCFASBSW	1	CTCFASBACBU	Offer/Acc	C
4								21							
5								22							
6								23							
7		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	30	912000000100	WA College Grant-Waitlist	CTCFASBSW	1	CTCFASBASNG4	Offer	C
8		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	40	912000000200	College Bound Scholarship	CTCFASBSC	1	CTCFASBACB4	Offer/Acc	C
9								41							
10								42							
11								43							
12		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	50	912000000200	College Bound Scholarship	CTCFASBSC	1	CTCFASBACB4	Offer	C
13								51							
14								52							
15								53							
16		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	60	911000000100	Federal Suppl Educ Opp Grant		50	900	Offer/Acc	C
17		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	70	911000000110	SEOG Waitlist		50	900	Offer	C

Four-term packaging plans will need 3 more rows of WCG

Four-term packaging plans will need 3 more rows of CBS 'Okay to Pay'

Four-term packaging plans will need 3 more rows of CBS 'Okay to Award'

Example of a college planning out the sequence number for the new WCG and CBS rows that will be added for a three-term packaging plan.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
16		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	140	913000000000		CTCFACNCGS4	50	975	Offer/Acc	D
17		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	150	913000000000		CTCFACNCGS5	50	675	Offer/Acc	D
18		2024	UGRD	SUFAWISP	A	10	CTCFAPUFW	160	930000000000	Work Study Offer	CTCFACNSWKS	810	7290	Offer	C
19		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	10	911000000000	Federal Pell Grant	CTCFASBSP	1	9999999	Offer/Acc	C
20		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	20	912000000000	WA College Grant	CTCFASBSW	1	CTCFASBACB3	Offer/Acc	C
21								21							
22								22							
23		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	30	912000000100	WA College Grant-Waitlist	CTCFASBSW	0	CTCFASBASNG3	Offer	C
24		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	40	912000000200	College Bound Scholarship	CTCFASBSC	1	CTCFASBACB3	Offer/Acc	C
25								41							
26								42							
27		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	50	912000000200	College Bound Scholarship	CTCFASBSC	1	CTCFASBACB3	Offer	C
28								51							
29								52							
30		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	60	911000000100	Federal Suppl Educ Opp Grant		50	900	Offer/Acc	C
31		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	70	911000000110	SEOG Waitlist	CTCFACNSEOG4	50	900	Offer	C
32		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	80	911000000100	Federal Suppl Educ Opp Grant	CTCFACNSEOG2	50	750	Offer/Acc	C
33		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	90	911000000110	SEOG Waitlist	CTCFACNSEOG3	50	750	Offer	C
34		2024	UGRD	FA-WI-SP	A	20	CTCFAPFAWISP	100	913000000100	Need Based Tuition Waiver	CTCFACNNBTW	150	CTCFACNNBTW	Offer/Acc	C

Three-term packaging plans will need 2 more rows of WCG

Three-term packaging plans will need 2 more rows of CBS 'Okay to Pay'

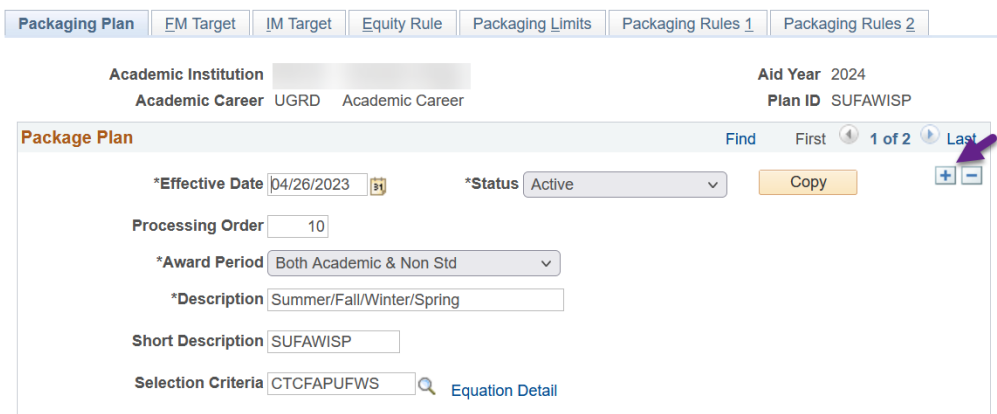
Three-term packaging plans will need 2 more rows of CBS 'Okay to Award'

SUFAWISP or FAWISPSU Packaging Plans

Four-term packaging plans will have WCG listed four times in the packaging plan, one row for each term.
Four-term packaging plans will have CBS listed eight times in the packaging plan, two rows for each term.

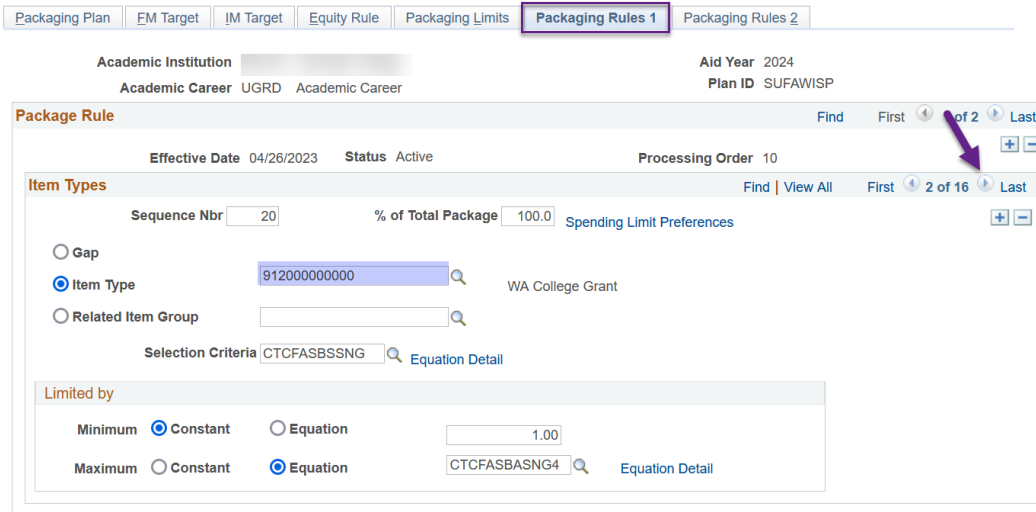
NAVIGATION: Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan

Select your college's four-term packaging plan (**SUFAWISP-header** or **FAWISPSU-trailer**) for 2024 aid year then add an effective dated row of today



THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Summer quarter for headers** versus **Fall quarter for trailers**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow





WCG & CBS Enrollment-Based Packaging Setup

Update the following areas

Selection Criteria: CTCFASBSWCG1 (WCG 1 Qtr check)

Limited by: CTCFASBAWCGU (WCG Award Summer) or CTCFASBAWCGF (WCG Award Fall)

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution [] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find View All First 2 of 17 Last

Sequence Nbr 20 % of Total Package 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type 912000000000 WA College Grant
☐ Related Item Group

Selection Criteria CTCFASBSWCG1 Equation Detail

Limited by

Minimum ☒ Constant ☐ Equation 1.00
Maximum ☐ Constant ☒ Equation CTCFASBACBU Equation Detail

Select the **Packaging Rules 2** tab and update the *Split Code* to **Summer**—header or **Fall**—trailer

IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | **Packaging Rules 2**

Academic Institution [] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find View All First 2 of 19 Last

Sequence Nbr 20 Item Type 912000000000 WA College Grant
Award Action Offer/Accept

Disbursement Plan

☐ Use Item Type Default Disbt Plan 09 Summer-Fall-Winter-Spring
☒ Override Default

Split Code

☐ Use Item Type Default Split Code U1 Summer
☒ Override Default



WCG & CBS Enrollment-Based Packaging Setup

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Fall quarter** for headers versus **Winter quarter** for trailers.

Return to the **Packaging Rules 1** tab and add a new row

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution [] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last
Effective Date 04/26/2023 Status Active Processing Order 10
Item Types Find View All First 3 of 17 Last
Sequence Nbr 161 X % of Total Package 100.0 Spending Limit Preferences
Gap
Item Type []
Related Item Group []
Selection Criteria []
Limited by
Minimum Constant Equation
Maximum Constant Equation

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 21)

Item Type: 912000000000

Selection Criteria: CTCFASBSWCG2 (WCG 2 Qtr check)

Limited by: Equation then CTCFASBAWCGF (WCG Award Fall) or CTCFASBAWCGW (WCG Award Winter)

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution [] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last
Effective Date 04/26/2023 Status Active Processing Order 10
Item Types Find View All First 3 of 17 Last
Sequence Nbr 21 % of Total Package 100.0 Spending Limit Preferences
Gap
Item Type 912000000000 WA College Grant
Related Item Group []
Selection Criteria CTCFASBSWCG2 Equation Detail
Limited by
Minimum Constant Equation
Maximum Constant Equation
Equation CTCFASBAWCGF Equation Detail



Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Su-Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Fall**—header or **Winter**—trailer

The screenshot shows the 'Packaging Rules 2' tab in the ctcLink system. At the top, there are tabs for 'IM Target', 'Equity Rule', 'Packaging Limits', 'Packaging Rules 1', and 'Packaging Rules 2' (which is selected). Below the tabs, there are fields for 'Academic Institution' (a dropdown menu), 'Academic Career' (with options 'UGRD' and 'Academic Career'), 'Aid Year' (set to '2024'), and 'Plan ID' (set to 'SUF AWISP').

The main content area displays configuration for 'Item Type Defaults'. It includes fields for 'Effective Date' (04/26/2023), 'Status' (Active), and 'Processing Order' (10). Below these, there are search and navigation buttons: 'Find', 'First', '1 of 2', and 'Last'. The 'Item Type Defaults' section has a sub-header 'Find | View All' and 'First 3 of 19 Last'. It shows a table with columns for 'Sequence Nbr' (21), 'Item Type' (912000000000), and 'WA College Grant'. The 'Award Action' is set to 'Offer/Accept'. Below the table, there are two sections: 'Disbursement Plan' and 'Split Code'. Each section has two radio buttons: 'Use Item Type Default' and 'Override Default'. The 'Override Default' option is selected in both sections. In the 'Disbursement Plan' section, the 'Disbt Plan' is set to '09' and the text 'Summer-Fall-Winter-Spring' is visible. In the 'Split Code' section, the 'Split Code' is set to 'F1' and the text 'Fall' is visible.

THE THIRD ROW OF WCG will be tied to the **3rd quarter** in your packaging plan: **Winter quarter** for headers versus **Spring quarter** for trailers.

Return to the **Packaging Rules 1** tab and add a new row

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution: [Redacted] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types Find | View All First 5 of 19 Last

Sequence Nbr: 161 ✗ % of Total Package: 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type [Search]
☐ Related Item Group [Search]
Selection Criteria [Search]

Limited by

Minimum ☒ Constant ☐ Equation [Search]
Maximum ☒ Constant ☐ Equation [Search]

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 22)

Item Type: 912000000000

Selection Criteria: CTCFASBSWCG3 (WCG 3 Qtr check)

Limited by: Equation then CTCFASBAWCGW (WCG Award Winter) or CTCFASBAWCGS (WCG Award Spring)

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution: [Redacted] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types Find | View All First 4 of 19 Last

Sequence Nbr: 22 % of Total Package: 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type: 912000000000 WA College Grant
☐ Related Item Group [Search]
Selection Criteria: CTCFASBSWCG3 Equation Detail

Limited by

Minimum ☒ Constant ☐ Equation [Search]
Maximum ☐ Constant ☒ Equation: CTCFASBAWCGW Equation Detail

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Su-Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter-header** or **Spring-trailer**

IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | **Packaging Rules 2**

Academic Institution: [] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Type Defaults Find | View All First 4 of 19 Last

Sequence Nbr: 22 Item Type: 912000000000 WA College Grant
Award Action: Offer/Accept

Disbursement Plan

☐ Use Item Type Default Disbt Plan: 09 Summer-Fall-Winter-Spring
☒ **Override Default**

Split Code

☐ Use Item Type Default Split Code: W1 Winter
☒ **Override Default**

THE FOURTH ROW OF WCG will be tied to the **4th quarter** in your packaging plan: **Spring quarter** for headers versus **Summer quarter** for trailers.

Return to the **Packaging Rules 1** tab and add a new row

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

Academic Institution: [] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types Find | View All First 5 of 19 Last

Sequence Nbr: 161 ✗ % of Total Package: 100.0 Spending Limit Preferences

☐ Gap
☒ **Item Type** []
☐ Related Item Group []
Selection Criteria: []

Limited by

Minimum ☒ Constant ☐ Equation []
Maximum ☒ Constant ☐ Equation []

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 23)

Item Type: 912000000000

Selection Criteria: CTCFASBSWCG4 (WCG 4 Qtr check)

Limited by: Equation then CTCFASBAWCGS (WCG Award Spring) or CTCFASBAWCGU (WCG Award Summer)

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution [Redacted] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find | View All First 5 of 19 Last

Sequence Nbr 23 % of Total Package 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type 912000000000 WA College Grant
☐ Related Item Group

Selection Criteria CTCFASBSWCG4 Equation Detail

Limited by

Minimum ☒ Constant ☐ Equation
Maximum ☐ Constant ☒ Equation CTCFASBAWCGS Equation Detail

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su

Split Code: Override Default then Spring-header or Summer-trailer

IM Target | Equity Rule | Packaging Limits | Packaging Rules 1 | **Packaging Rules 2**

Academic Institution [Redacted] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Find First 1 of 2 Last

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find | View All First 5 of 19 Last

Sequence Nbr 23 Item Type 912000000000 WA College Grant
Award Action Offer/Accept

Disbursement Plan

☐ Use Item Type Default Disbt Plan 09 Summer-Fall-Winter-Spring
☒ Override Default

Split Code

☐ Use Item Type Default Split Code S1 Spring
☒ Override Default

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

IM Target Equity Rule Packaging Limits Packaging Rules 1 **Packaging Rules 2**

Academic Institution Aid Year 2024
 Academic Career UGRD Academic Career Plan ID SUFAWISP

Find First 1 of 2 Last

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find View All First 6 of 19 Last

Sequence Nbr 30 Item Type 912000000100 WA College Grant-Waitlist
 Award Action Offer

Disbursement Plan
☐ Use Item Type Default Disbt Plan 09 Summer-Fall-Winter-Spring
☒ Override Default

Split Code
☐ Use Item Type Default Split Code U4 Sumr-Fall-Winter-Spring
☒ Override Default

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!

IM Target Equity Rule Packaging Limits Packaging Rules 1 **Packaging Rules 2**

Academic Institution Aid Year 2024
 Academic Career UGRD Academic Career Plan ID SUFAWISP

Find First 1 of 2 Last

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find View All First 6 of 18 Last

Sequence Nbr 40 Item Type 912000000200 College Bound Scholarship
 Award Action Offer/Accept

Disbursement Plan
☐ Use Item Type Default Disbt Plan 09 Summer-Fall-Winter-Spring
☒ Override Default

Split Code
☐ Use Item Type Default Split Code U4 Sumr-Fall-Winter-Spring
☒ Override Default

THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Summer quarter** for headers versus **Fall quarter** for trailers.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)** or **CTCFASBACBF (CBS Award Fall)**

[JM Target](#)
[Equity Rule](#)
[Packaging Limits](#)
[Packaging Rules 1](#)
[Packaging Rules 2](#)

Academic Institution Aid Year 2024
 Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find View All First 6 of 18 Last

Sequence Nbr % of Total Package [Spending Limit Preferences](#)

☐ Gap
☒ Item Type College Bound Scholarship
☐ Related Item Group

Selection Criteria [Equation Detail](#)

Limited by

Minimum ☒ Constant ☐ Equation
 Maximum ☐ Constant ☒ Equation [Equation Detail](#)

Select the **Packaging Rules 2** tab and update the *Split Code* to **Summer–header** or **Fall-trailer**

[JM Target](#)
[Equity Rule](#)
[Packaging Limits](#)
[Packaging Rules 1](#)
[Packaging Rules 2](#)

Academic Institution Aid Year 2024
 Academic Career UGRD Academic Career Plan ID SUFAWISP

Packaging Rules 2 Find First 1 of 2 Last

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find View All First 6 of 18 Last

Sequence Nbr 40 Item Type 91200000200 College Bound Scholarship
 Award Action

Disbursement Plan

☐ Use Item Type Default Disbt Plan Summer-Fall-Winter-Spring
☒ Override Default

Split Code

☐ Use Item Type Default Split Code Summer
☒ Override Default

THE SECOND ROW OF CBS ‘Okay to Pay’ will be tied to the **2nd quarter** in your packaging plan: **Fall quarter** for headers versus **Winter quarter** for trailers.

Return to the **Packaging Rules 1** tab and add a new row



WCG & CBS Enrollment-Based Packaging Setup

Packaging Plan EM Target IM Target Equity Rule Packaging Limits **Packaging Rules 1** Packaging Rules 2

Academic Institution Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find | View All First 3 of 17 Last

Sequence Nbr 161  % of Total Package 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type 
☐ Related Item Group 
Selection Criteria 

Limited by

Minimum	☒ Constant	☐ Equation	
Maximum	☒ Constant	☐ Equation	



WCG & CBS Enrollment-Based Packaging Setup

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 41)

Item Type: 912000000200

Selection Criteria: CTCFASBSCBP2 (CBS OK2P 2 Qtr check)

Limited by: CTCFASBACBF (CBS Award Fall) or CTCFASBACBW (CBS Award Winter)

The screenshot shows the 'Packaging Rules' tab in a software interface. At the top, there are tabs for 'JM Target', 'Equity Rule', 'Packaging Limits', 'Packaging Rules 1', and 'Packaging Rules 2'. Below these, the 'Package Rule' section is active, showing 'Effective Date: 04/26/2023', 'Status: Active', and 'Processing Order: 10'. The 'Item Types' section is expanded, showing 'Sequence Nbr: 41', '% of Total Package: 100.0', and 'Spending Limit Preferences'. Under 'Item Types', there are three radio buttons: 'Gap', 'Item Type' (selected), and 'Related Item Group'. The 'Item Type' is set to '912000000200' with a search icon. Below this, 'Selection Criteria' is set to 'CTCFASBSCBP2' with a search icon. The 'Limited by' section has two rows: 'Minimum' with 'Constant' selected and 'Equation' unselected; 'Maximum' with 'Constant' unselected and 'Equation' selected, with the value 'CTCFASBACBF' entered and a search icon.

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su

Split Code: Override Default then Fall-header or Winter-trailer

IM Target Equity Rule Packaging Limits Packaging Rules 1 **Packaging Rules 2**

Academic Institution Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Find First 1 of 2 Last

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find View All First 7 of 20 Last

Sequence Nbr 41 Item Type 912000000200 College Bound Scholarship
Award Action Offer/Accept

Disbursement Plan

☐ Use Item Type Default Disbt Plan 09 Summer-Fall-Winter-Spring
☒ Override Default

Split Code

☐ Use Item Type Default Split Code F1 Fall
☒ Override Default

THE THIRD ROW OF CBS 'Okay to Pay' will be tied to the **3rd quarter** in your packaging plan: **Winter quarter** for headers versus **Spring quarter** for trailers.

Return to the **Packaging Rules 1** tab and add a new row

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

Academic Institution Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find View All First 5 of 10 Last

Sequence Nbr 161  % of Total Package 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type
☐ Related Item Group
Selection Criteria

Limited by

Minimum ☒ Constant ☐ Equation
Maximum ☒ Constant ☐ Equation

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 42)

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCP3 (CBS OK2P 3 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)** or **CTCFASBACBS (CBS Award Spring)**

IM Target Equity Rule Packaging Limits **Packaging Rules 1** Packaging Rules 2

Academic Institution Academic Career UGRD Academic Career Aid Year 2024 Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find View All First 8 of 20 Last

Sequence Nbr 42 % of Total Package 100.0 Spending Limit Preferences

☐ Gap

☒ Item Type 912000000200 College Bound Scholarship

☐ Related Item Group

Selection Criteria CTCFASBSCP3 Equation Detail

Limited by

Minimum ☒ Constant ☐ Equation

Maximum ☐ Constant ☒ Equation CTCFASBAWCGW Equation Detail

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Su-Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**—header or **Spring**—trailer

IM Target Equity Rule Packaging Limits Packaging Rules 1 **Packaging Rules 2**

Academic Institution Academic Career UGRD Academic Career Aid Year 2024 Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Type Defaults Find View All First 8 of 20 Last

Sequence Nbr 42 Item Type 912000000200 College Bound Scholarship

Award Action Offer/Accept

Disbursement Plan

☐ Use Item Type Default ☒ Override Default Disbt Plan 09 Summer-Fall-Winter-Spring

Split Code

☐ Use Item Type Default ☒ Override Default Split Code W1 Winter

THE FOURTH ROW OF CBS 'Okay to Pay' will be tied to the **4th quarter** in your packaging plan: **Spring quarter** for headers versus **Summer quarter** for trailers.



WCG & CBS Enrollment-Based Packaging Setup

Return to the **Packaging Rules 1** tab and add a new row

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution: [] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule: [] Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types: [] Find View All First 5 of 1 Last

Sequence Nbr: 161 X % of Total Package: 100.0 Spending Limit Preferences: []

Gap: []
Item Type: []
Related Item Group: []
Selection Criteria: []

Limited by:

Minimum: ☒ Constant ☐ Equation []
Maximum: ☒ Constant ☐ Equation []

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 43)

Item Type: 91200000200

Selection Criteria: CTCFASBSCBP4 (CBS OK2P 4 Qtr check)

Limited by: CTCFASBACBS (CBS Award Spring) or CTCFASBACBU (CBS Award Summer)

IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution: [] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule: [] Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types: [] Find View All First 9 of 21 Last

Sequence Nbr: 43 % of Total Package: 100.0 Spending Limit Preferences: []

Gap: []
Item Type: 91200000200 College Bound Scholarship
Related Item Group: []
Selection Criteria: CTCFASBSCBP4 Equation Detail

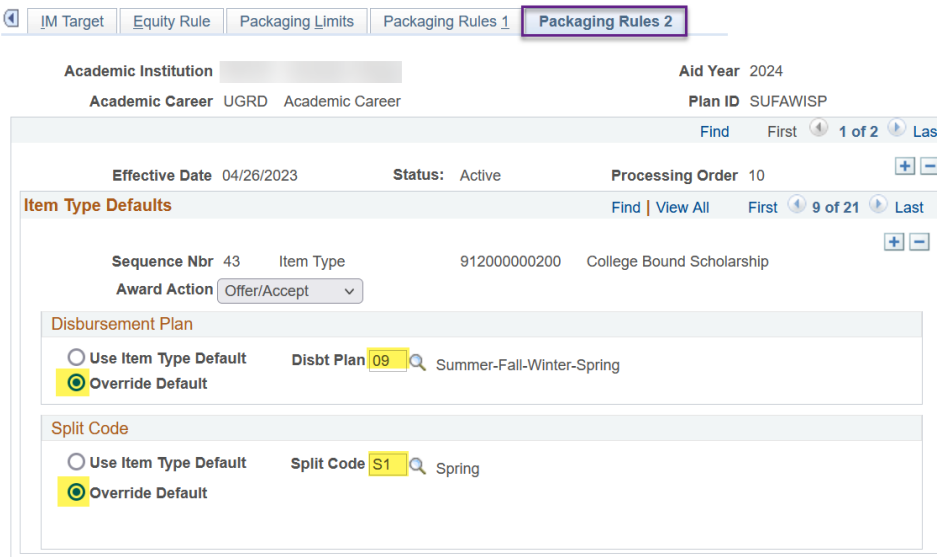
Limited by:

Minimum: ☒ Constant ☐ Equation []
Maximum: ☐ Constant ☒ Equation CTCFASBACBS Equation Detail

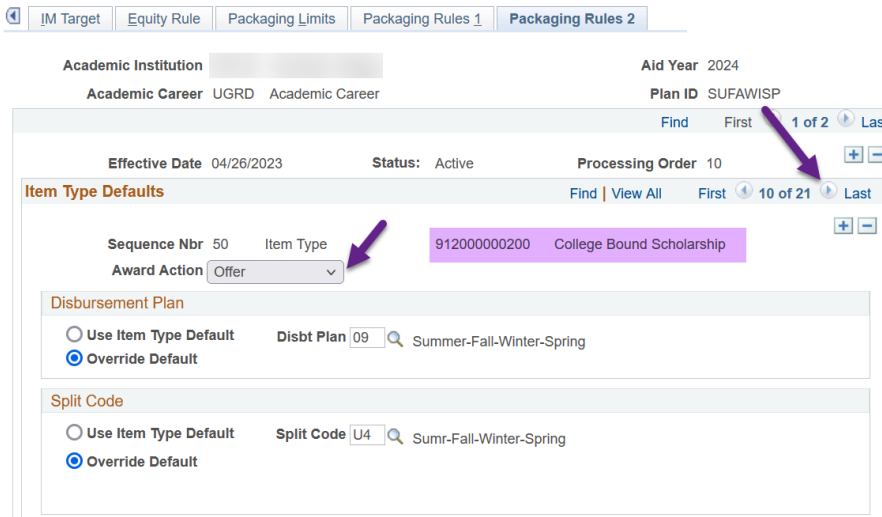
Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su

Split Code: Override Default then **Spring**—header or **Summer**—trailer



Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊



THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Summer quarter for headers** versus **Fall quarter for trailers**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: CTCFASBSCBA1 (CBS OK2A 1 Qtr check)



WCG & CBS Enrollment-Based Packaging Setup

Limited by: CTCFASBACBU (CBS Award Summer) or CTCFASBACBF (CBS Award Fall)

IM Target Equity Rule Packaging Limits **Packaging Rules 1** Packaging Rules 2

Academic Institution [REDACTED] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find View All First 10 of 21 Last

Sequence Nbr 50 % of Total Package 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type 912000000200 College Bound Scholarship
☐ Related Item Group

Selection Criteria CTCFASBSCBA1 Equation Detail

Limited by

Minimum ☒ Constant ☐ Equation 1.00
Maximum ☐ Constant ☒ Equation CTCFASBACBU Equation Detail

Select the **Packaging Rules 2** tab and update the *Split Code* to **Summer**—header or **Fall**—trailer

IM Target Equity Rule Packaging Limits **Packaging Rules 1** **Packaging Rules 2**

Academic Institution [REDACTED] Aid Year 2024
Academic Career UGRD Academic Career Plan ID SUFAWISP

Find First 1 of 2 Last

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find View All First 10 of 21 Last

Sequence Nbr 50 Item Type 912000000200 College Bound Scholarship
Award Action Offer

Disbursement Plan

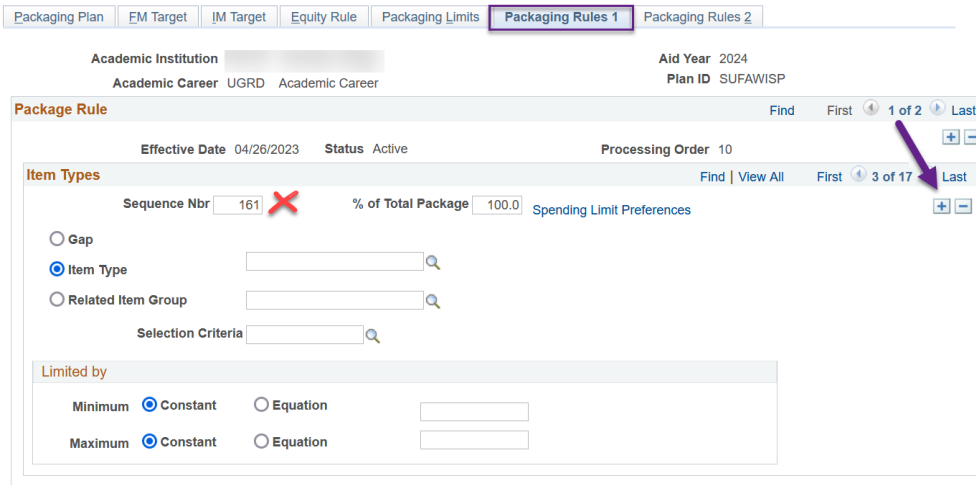
☐ Use Item Type Default Disbt Plan 09 Summer-Fall-Winter-Spring
☒ Override Default

Split Code

☐ Use Item Type Default Split Code U1 Summer
☒ Override Default

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Fall quarter** for headers versus **Winter quarter** for trailers.

Return to the **Packaging Rules 1** tab and add a new row



Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution: [Redacted] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types Find | View All First 3 of 17 Last

Sequence Nbr: 161 ✗ % of Total Package: 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type [Search]
☐ Related Item Group [Search]
Selection Criteria [Search]

Limited by

Minimum ☒ Constant ☐ Equation [Search]
Maximum ☒ Constant ☐ Equation [Search]

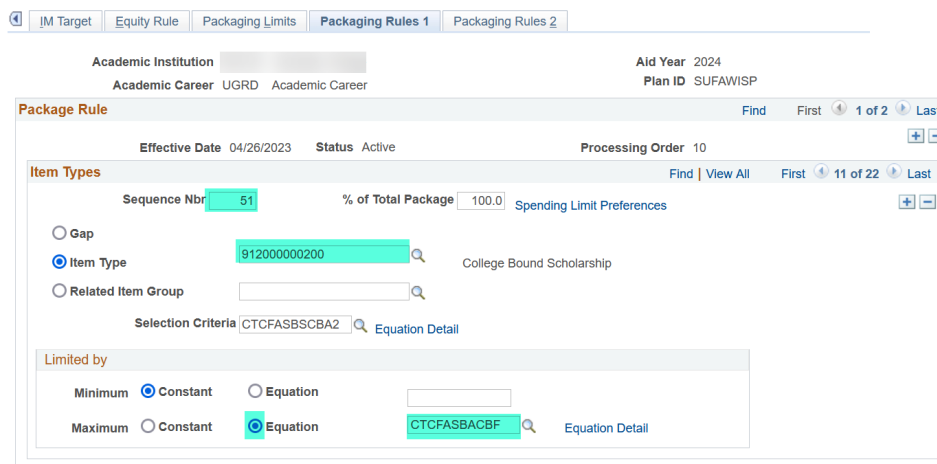
Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 51)

Item Type: 912000000200

Selection Criteria: CTCFASBSCBA2 (CBS OK2A 2 Qtr check)

Limited by: CTCFASBACBF (CBS Award Fall) or CTCFASBACBW (CBS Award Winter)



IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution: [Redacted] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types Find | View All First 11 of 22 Last

Sequence Nbr: 51 % of Total Package: 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type 912000000200 [Search] College Bound Scholarship
☐ Related Item Group [Search]
Selection Criteria: CTCFASBSCBA2 [Search] Equation Detail

Limited by

Minimum ☒ Constant ☐ Equation [Search]
Maximum ☐ Constant ☒ Equation CTCFASBACBF [Search] Equation Detail

Select the **Packaging Rules 2** tab and update the following

Award Action: Offer

Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su



WCG & CBS Enrollment-Based Packaging Setup

Split Code: Override Default then **Fall**—header or **Winter**—trailer

IM Target Equity Rule Packaging Limits Packaging Rules 1 **Packaging Rules 2**

Academic Institution Academic Career UGRD Academic Career Aid Year 2024 Plan ID SUFAWISP

Find First 1 of 2 Last

Effective Date 04/26/2023 Status: Active Processing Order 10

Item Type Defaults Find View All First 11 of 22 Last

Sequence Nbr 51 Item Type 912000000200 College Bound Scholarship

Award Action Offer

Disbursement Plan

☐ Use Item Type Default ☒ Override Default Disbt Plan 09 Summer-Fall-Winter-Spring

Split Code

☐ Use Item Type Default ☒ Override Default Split Code F1 Fall



WCG & CBS Enrollment-Based Packaging Setup

THE THIRD ROW OF CBS 'Okay to Award' will be tied to the **3rd quarter** in your packaging plan: **Winter quarter for headers** versus **Spring quarter for trailers**.

Return to the **Packaging Rules 1** tab and add a new row

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

Academic Institution: [Redacted] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types Find | View All First 5 of 1 Last

Sequence Nbr: 161 X % of Total Package: 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type [Redacted]
☐ Related Item Group [Redacted]
Selection Criteria: [Redacted]

Limited by

Minimum ☒ Constant ☐ Equation [Redacted]
Maximum ☒ Constant ☐ Equation [Redacted]

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 52)

Item Type: 912000000200

Selection Criteria: CTCFASBSCBA3 (CBS OK2A 3 Qtr check)

Limited by: CTCFASBACBW (CBS Award Winter) or CTCFASBACBS (CBS Award Spring)

Packaging Plan | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution: [Redacted] Aid Year: 2024
Academic Career: UGRD Academic Career Plan ID: SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date: 04/26/2023 Status: Active Processing Order: 10

Item Types Find | View All First 12 of 23 Last

Sequence Nbr: 52 % of Total Package: 100.0 Spending Limit Preferences

☐ Gap
☒ Item Type 912000000200 College Bound Scholarship
☐ Related Item Group [Redacted]
Selection Criteria: CTCFASBSCBA3 Equation Detail

Limited by

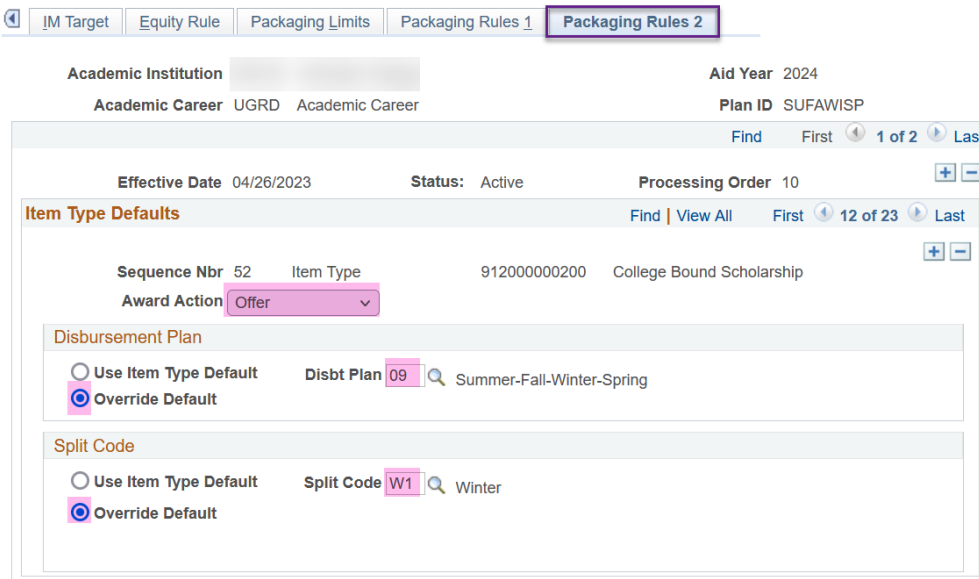
Minimum ☒ Constant ☐ Equation [Redacted]
Maximum ☐ Constant ☒ Equation CTCFASBACBW Equation Detail

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Su-Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**—header or **Spring**—trailer



THE FOURTH ROW OF CBS 'Okay to Award' will be tied to the **4th quarter** in your packaging plan: **Spring quarter for headers** versus **Summer quarter for trailers**.

Return to the **Packaging Rules 1** tab and add a new row

Packaging Plan | EM Target | IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution Aid Year 2024
 Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find | View All First 5 of 1 Last

Sequence Nbr % of Total Package Spending Limit Preferences

☐ Gap
☒ Item Type
☐ Related Item Group
 Selection Criteria

Limited by

Minimum ☒ Constant ☐ Equation
 Maximum ☒ Constant ☐ Equation

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 53)

Item Type: 91200000200

Selection Criteria: CTCFASBSCBA4 (CBS OK2A 4 Qtr check)

Limited by: CTCFASBACBS (CBS Award Spring) or CTCFASBACBU (CBS Award Summer)

IM Target | Equity Rule | Packaging Limits | **Packaging Rules 1** | Packaging Rules 2

Academic Institution Aid Year 2024
 Academic Career UGRD Academic Career Plan ID SUFAWISP

Package Rule Find First 1 of 2 Last

Effective Date 04/26/2023 Status Active Processing Order 10

Item Types Find | View All First 13 of 24 Last

Sequence Nbr % of Total Package Spending Limit Preferences

☐ Gap
☒ Item Type College Bound Scholarship
☐ Related Item Group
 Selection Criteria Equation Detail

Limited by

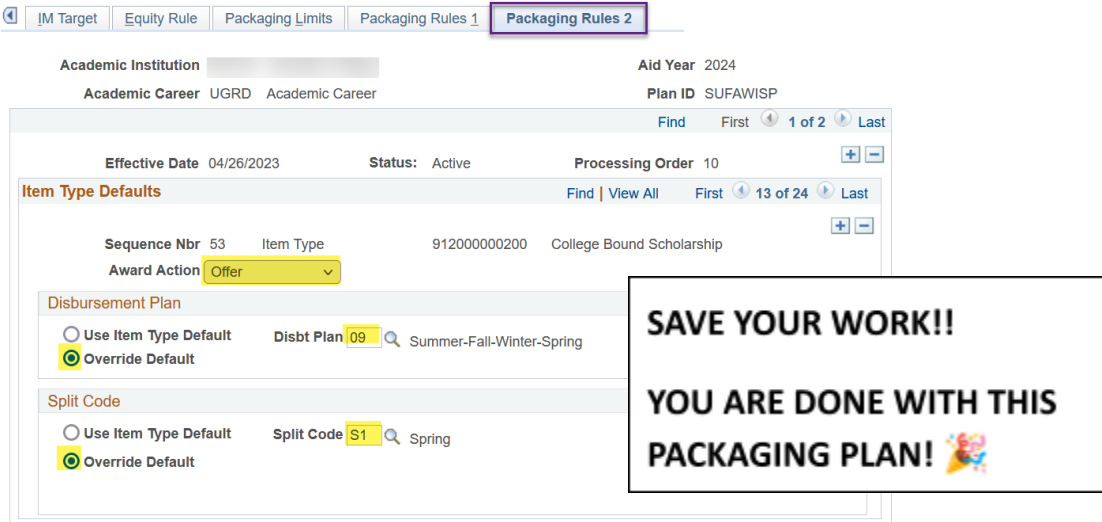
Minimum ☒ Constant ☐ Equation
 Maximum ☐ Constant ☒ Equation Equation Detail

Select the **Packaging Rules 2** tab and update the following

Award Action: Offer

Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su

Split Code: Override Default then Spring-header or Summer-trailer

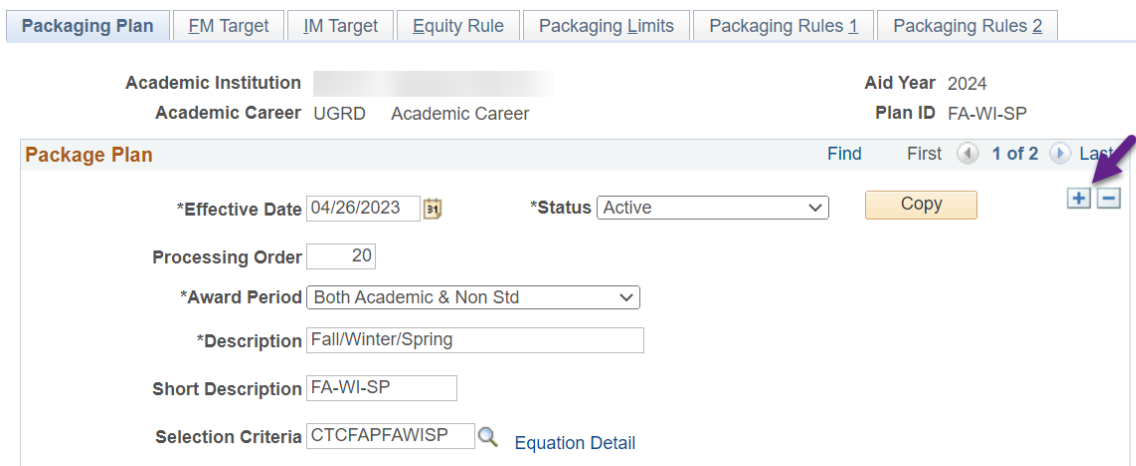


FA-WI-SP Packaging Plan

Three-term packaging plans will have WCG listed three times in the packaging plan, one row for each term. Three-term packaging plans will have CBS listed six times in the packaging plan, two rows for each term.

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

Select the FA-WI-SP for 2024 aid year then add an effective dated row of today



THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Fall quarter**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow



Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGF (WCG Award Fall)**

Select the **Packaging Rules 2** tab and update *Split Code* to **Fall**

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row



Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 21)**

Item Type: **912000000000**

Selection Criteria: **CTCFASBSWCG2 (WCG 2 Qtr check)**

Limited by: **Equation** then **CTCFASBAWCGW (WCG Award Winter)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**

THE THIRD ROW OF WCG will be tied to the **3rd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 22)**

Item Type: **912000000000**

Selection Criteria: **CTCFASBSWCG3 (WCG 3 Qtr check)**

Limited by: **Equation** then **CTCFASBAWCGS (WCG Award Spring)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Spring**

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!



THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Fall**

THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the **2nd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 41)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP2 (CBS OK2P 2 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**

THE THIRD ROW OF CBS 'Okay to Pay' will be tied to the **3rd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 42)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP3 (CBS OK2P 3 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the following



Disbursement Plan: **Override Default** then **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Spring**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Fall**

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 51)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA2 (CBS OK2A 2 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Fa-Wi-Sp**-or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**

THE THIRD ROW OF CBS 'Okay to Award' will be tied to the **3rd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row



Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 52)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA3 (CBS OK2A 3 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Spring**

SAVE YOUR WORK!!
YOU ARE DONE WITH THIS
PACKAGING PLAN! 🎉

SU-FA-WI Packaging Plan ****HEADER ONLY****

Three-term packaging plans will have WCG listed three times in the packaging plan, one row for each term.
Three-term packaging plans will have CBS listed six times in the packaging plan, two rows for each term.

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

Select the SU-FA-WI for 2024 aid year then add an effective dated row of today

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

Academic Institution
Academic Career UGRD Academic Career
Aid Year 2024
Plan ID SU-FA-WI

Package Plan

Find First 1 of 2 Last

*Effective Date 04/26/2023
*Status Active
Copy

Processing Order 30

*Award Period Both Academic & Non Std

*Description Summer/Fall/Winter

Short Description SU-FA-WI

Selection Criteria CTCFAPSUFAWI
Equation Detail

THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Summer quarter**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGU (WCG Award Summer)**

Select the **Packaging Rules 2** tab and update *Split Code* to **Summer**

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab and add a new row Update the following areas



Sequence Nbr: (the next Sequence Nbr i.e. 21)

Item Type: 912000000000

Selection Criteria: CTCFASBSWCG2 (WCG 2 Qtr check)

Limited by: Equation then CTCFASBAWCGF (WCG Award Fall)

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Su-Fa-Wi** or **Su-Fa-Wi-Sp**

Split Code: **Override Default** then **Fall**

THE THIRD ROW OF WCG will be tied to the **3rd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 22)

Item Type: 912000000000

Selection Criteria: CTCFASBSWCG3 (WCG 3 Qtr check)

Limited by: Equation then CTCFASBAWCGW (WCG Award Winter)

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Su-Fa-Wi** or **Su-Fa-Wi-Sp**

Split Code: **Override Default** then **Winter**

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!



THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Summer**

THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the **2nd quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 41)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP2 (CBS OK2P 2 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default then Su-Fa-Wi or Su-Fa-Wi-Sp**

Split Code: **Override Default then Fall**

THE THIRD ROW OF CBS 'Okay to Pay' will be tied to the **3rd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 42)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP3 (CBS OK2P 3 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the following



WCG & CBS Enrollment-Based Packaging Setup

Disbursement Plan: **Override Default** then **Su-Fa-Wi** or **Su-Fa-Wi-Sp**

Split Code: **Override Default** then **Winter**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Summer**

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 51)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA2 (CBS OK2A 2 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Su-Fa-Wi** or **Su-Fa-Wi-Sp**

Split Code: **Override Default** then **Fall**

THE THIRD ROW OF CBS 'Okay to Award' will be tied to the **3rd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas



Sequence Nbr: (the next Sequence Nbr i.e. 52)

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA3 (CBS OK2A 3 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Su-Fa-Wi** or **Su-Fa-Wi-Sp**

Split Code: **Override Default** then **Winter**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**

WI-SP-SU Packaging Plan ****TRAILER ONLY****

Three-term packaging plans will have WCG listed three times in the packaging plan, one row for each term.
Three-term packaging plans will have CBS listed six times in the packaging plan, two rows for each term.

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

Select the WI-SP-SU for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2024

Plan ID

WI-SP-SU

Package Plan

Find

First

1 of 2

List

*Effective Date

04/26/2023

*Status

Active

Copy

+

-

Processing Order

50

*Award Period

Both Academic & Non Std

*Description

Winter/Spring/Summer

Short Description

WI-SP-SU

Selection Criteria

CTCFAPWISPSU

Equation Detail

THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Winter quarter**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGW (WCG Award Winter)**

Select the **Packaging Rules 2** tab and update *Split Code* to **Winter**

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row



Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 21)**

Item Type: **912000000000**

Selection Criteria: **CTCFASBSWCG2 (WCG 2 Qtr check)**

Limited by: **Equation** then **CTCFASBAWCGS (WCG Award Spring)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Wi-Sp-Su**

Split Code: **Override Default** then **Spring**

THE THIRD ROW OF WCG will be tied to the **3rd quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 22)**

Item Type: **912000000000**

Selection Criteria: **CTCFASBSWCG3 (WCG 3 Qtr check)**

Limited by: **Equation** then **CTCFASBAWCGU (WCG Award Summer)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Wi-Sp-Su**

Split Code: **Override Default** then **Summer**

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!



THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Winter**

THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the **2nd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 41)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP2 (CBS OK2P 2 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default then Wi-Sp-Su**

Split Code: **Override Default then Spring**

THE THIRD ROW OF CBS 'Okay to Pay' will be tied to the **3rd quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 42)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP3 (CBS OK2P 3 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the following



Disbursement Plan: **Override Default** then **Wi-Sp-Su**

Split Code: **Override Default** then **Summer**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Winter**

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 51)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA2 (CBS OK2A 2 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Wi-Sp-Su**

Split Code: **Override Default** then **Spring**

THE THIRD ROW OF CBS 'Okay to Award' will be tied to the **3rd quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas



Sequence Nbr: (the next Sequence Nbr i.e. 52)

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA3 (CBS OK2A 3 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Wi-Sp-Su**

Split Code: **Override Default** then **Summer**

SAVE YOUR WORK!!
YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉

FA-WI Packaging Plan

Two-term packaging plans will have WCG listed twice in the packaging plan, one row for each term.
Two-term packaging plans will have CBS listed four times in the packaging plan, two rows for each term.

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

Select the FA-WI for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2024

Plan ID

FA-WI

Package Plan

Find

First

1 of 1

Next

*Effective Date

09/22/2022

*Status

Active

Copy

+

-

Processing Order

20

*Award Period

Both Academic & Non Std

*Description

Fall/Winter

Short Description

FA-WI

Selection Criteria

CTCFAPFAWI

Equation Detail

THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Fall quarter**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGF (WCG Award Fall)**

Select the **Packaging Rules 2** tab and update *Split Code* to **Fall**

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row



Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 21)

Item Type: 912000000000

Selection Criteria: CTCFASBSWCG2 (WCG 2 Qtr check)

Limited by: Equation then CTCFASBAWCGW (WCG Award Winter)

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Fa-Wi** or **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!

THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: CTCFASBSCBP1 (CBS OK2P 1 Qtr check)

Limited by: CTCFASBACBF (CBS Award Fall)

Select the **Packaging Rules 2** tab and update the *Split Code* to **Fall**

THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the **2nd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 41)

Item Type: 912000000200

Selection Criteria: CTCFASBSCBP2 (CBS OK2P 2 Qtr check)



WCG & CBS Enrollment-Based Packaging Setup

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Fa-Wi** or **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Fall**

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 51)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA2 (CBS OK2A 2 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Fa-Wi** or **Fa-Wi-Sp** or **Fa-Wi-Sp-Su**

Split Code: **Override Default** then **Winter**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**

WI-SP Packaging Plan

Two-term packaging plans will have WCG listed twice in the packaging plan, one row for each term.
Two-term packaging plans will have CBS listed four times in the packaging plan, two rows for each term.

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

Select the WI-SP for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2024

Plan ID

WI-SP

Package Plan

Find

First

1 of 2

Last

*Effective Date

04/26/2023

*Status

Active

Copy

+

-

Processing Order

40

*Award Period

Both Academic & Non Std

*Description

Winter/Spring

Short Description

WI-SP

Selection Criteria

CTCFAPWISP

Equation Detail

THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Winter quarter**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGW (WCG Award Winter)**

Select the **Packaging Rules 2** tab and update *Split Code* to **Winter**

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Spring quarter**.



WCG & CBS Enrollment-Based Packaging Setup

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 21)

Item Type: 912000000000

Selection Criteria: CTCFASBSWCG2 (WCG 2 Qtr check)

Limited by: Equation then CTCFASBAWCGS (WCG Award Spring)

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: Override Default then Wi-Sp or Wi-Sp-Su

Split Code: Override Default then Spring

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!

THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: CTCFASBSCBP1 (CBS OK2P 1 Qtr check)

Limited by: CTCFASBACBW (CBS Award Winter)

Select the **Packaging Rules 2** tab and update the *Split Code* to **Winter**

THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the **2nd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: (the next Sequence Nbr i.e. 41)

Item Type: 912000000200

Selection Criteria: CTCFASBSCBP2 (CBS OK2P 2 Qtr check)



Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Wi-Sp** or **Wi-Sp-Su**

Split Code: **Override Default** then **Spring**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Winter quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Winter**

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 51)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA2 (CBS OK2A 2 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Wi-Sp** or **Wi-Sp-Su**

Split Code: **Override Default** then **Spring**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN!** 🎉

SU-FA Packaging Plan ****HEADER ONLY****

Two-term packaging plans will have WCG listed twice in the packaging plan, one row for each term.
Two-term packaging plans will have CBS listed four times in the packaging plan, two rows for each term.

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

Select the SU-FA for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2023

Plan ID

SU-FA

Package Plan

Find

First

1 of 7

Last

*Effective Date

04/26/2023

*Status

Active

Copy

+

-

Processing Order

40

*Award Period

Both Academic & Non Std

*Description

Summer/Fall

Short Description

SU-FA

Selection Criteria

CTCFAPSUFA

Equation Detail

THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Summer quarter**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGU (WCG Award Summer)**

Select the **Packaging Rules 2** tab and update *Split Code* to **Fall**

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab and add a new row



Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 21)**

Item Type: **912000000000**

Selection Criteria: **CTCFASBSWCG2 (WCG 2 Qtr check)**

Limited by: **Equation then CTCFASBAWCGF (WCG Award Fall)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default then Su-Fa or Su-Fa-Wi-Sp**

Split Code: **Override Default then Fall**

Toggle to the **WCG Waitlist** item-type (912000000**100**) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!

THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Summer**

THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the **2nd quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 41)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP2 (CBS OK2P 2 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**



Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Su-Fa** or **Su-Fa-Wi-Sp**

Split Code: **Override Default** then **Fall**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Fall**

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Fall quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 51)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA2 (CBS OK2A 2 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Su-Fa** or **Su-Fa-Wi-Sp**

Split Code: **Override Default** then **Fall**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**

SP-SU Packaging Plan ****TRAILER ONLY****

Two-term packaging plans will have WCG listed twice in the packaging plan, one row for each term.
Two-term packaging plans will have CBS listed four times in the packaging plan, two rows for each term.

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

Select the SP-SU for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2024

Plan ID

SP-SU

Package Plan

Find

First

1 of 2

Next

*Effective Date

04/26/2023

*Status

Active

Copy

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-

Processing Order

60

*Award Period

Both Academic & Non Std

*Description

Spring/Summer

Short Description

SP-SU

Selection Criteria

CTCFAPSPSU

Equation Detail

THE FIRST ROW OF WCG will be tied to the **1st quarter** in your packaging plan: **Spring quarter**.

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGS (WCG Award Spring)**

Select the **Packaging Rules 2** tab and update *Split Code* to **Spring**

THE SECOND ROW OF WCG will be tied to the **2nd quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab and add a new row



Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 21)**

Item Type: **912000000000**

Selection Criteria: **CTCFASBSWCG2 (WCG 2 Qtr check)**

Limited by: **Equation then CTCFASBAWCGU (WCG Award Summer)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default then Sp-Su**

Split Code: **Override Default then Summer**

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!

THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the **1st quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Spring**

THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the **2nd quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 41)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBP2 (CBS OK2P 2 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the following

Disbursement Plan: **Override Default** then **Sp-Su**

Split Code: **Override Default** then **Summer**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

THE FIRST ROW OF CBS 'Okay to Award' will be tied to the **1st quarter** in your packaging plan: **Spring quarter**.

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and update the *Split Code* to **Spring**

THE SECOND ROW OF CBS 'Okay to Award' will be tied to the **2nd quarter** in your packaging plan: **Summer quarter**.

Return to the **Packaging Rules 1** tab and add a new row

Update the following areas

Sequence Nbr: **(the next Sequence Nbr i.e. 51)**

Item Type: **912000000200**

Selection Criteria: **CTCFASBSCBA2 (CBS OK2A 2 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and update the following

Award Action: **Offer**

Disbursement Plan: **Override Default** then **Sp-Su**

Split Code: **Override Default** then **Summer**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**

FALL ONLY Packaging Plan

One-term packaging plans will have WCG listed once in the packaging plan.

One-term packaging plans will have CBS listed twice in the packaging plan.

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

Select the FALL ONLY for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2023

Plan ID

FALL ONLY

Package Plan

Find

First

1 of 6

Last

*Effective Date

04/26/2023

*Status

Active

Copy

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-

Processing Order

80

*Award Period

Both Academic & Non Std

*Description

Fall

Short Description

FALL ONLY

Selection Criteria

CTCFAPFA

Equation Detail

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGF (WCG Award Fall)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Fall**

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!



Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Fall**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBF (CBS Award Fall)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Fall**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**

WINTR ONLY Packaging Plan

One-term packaging plans will have WCG listed once in the packaging plan.

One-term packaging plans will have CBS listed twice in the packaging plan.

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

Select the WINTR ONLY for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2023

Plan ID

WINTR ONLY

Packaging Plan

Find

First

1 of 5

Last

*Effective Date

04/26/2023

*Status

Active

Copy

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Processing Order

90

*Award Period

Both Academic & Non Std

*Description

Winter Only

Short Description

WINTR ONLY

Selection Criteria

CTCFAPWI

Equation Detail

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGW (WCG Award Winter)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Winter**

Toggle to the **WCG Waitlist** item-type (912000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!



WCG & CBS Enrollment-Based Packaging Setup

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Winter**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBW (CBS Award Winter)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Winter**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**

SPRG ONLY Packaging Plan

One-term packaging plans will have WCG listed once in the packaging plan.

One-term packaging plans will have CBS listed twice in the packaging plan.

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

Select the SPRG ONLY for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2023

Plan ID

SPRG ONLY

Package Plan

Find

First

1 of 2

Last

*Effective Date

04/26/2023

*Status

Active

Copy

+

-

Processing Order

100

*Award Period

Both Academic & Non Std

*Description

Spring Only

Short Description

SPRNG ONLY

Selection Criteria

CTCFAPSP

Equation Detail

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGS (WCG Award Spring)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Spring**

Toggle to the **WCG Waitlist** item-type (9120000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!



Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Spring**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBS (CBS Award Spring)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Spring**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**

SUMR ONLY Packaging Plan

One-term packaging plans will have WCG listed once in the packaging plan.

One-term packaging plans will have CBS listed twice in the packaging plan.

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

Select the SUMR ONLY for 2024 aid year then add an effective dated row of today

Packaging Plan

EM Target

IM Target

Equity Rule

Packaging Limits

Packaging Rules 1

Packaging Rules 2

Academic Institution

Academic Career

UGRD

Academic Career

Aid Year

2023

Plan ID

SUMR ONLY

Package Plan

Find

First

1 of 2

Last

*Effective Date

04/26/2023

*Status

Active

Copy

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Processing Order

70

*Award Period

Both Academic & Non Std

*Description

Summer Only

Short Description

SUMR ONLY

Selection Criteria

CTCFAPSU

Equation Detail

Select the **Packaging Rules 1** tab then toggle to the WCG item-type (912000000000) using the right arrow

Update the following areas

Selection Criteria: **CTCFASBSWCG1 (WCG 1 Qtr check)**

Limited by: **CTCFASBAWCGU (WCG Award Summer)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Summer**

Toggle to the **WCG Waitlist** item-type (9120000000100) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.

Once you delete the WCG Waitlist row, you will see you are now going to work on CBS 'Okay to Pay'!



Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBP1 (CBS OK2P 1 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Summer**

Toggle to the CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' 😊

Return to the **Packaging Rules 1** tab then update the following areas

Selection Criteria: **CTCFASBSCBA1 (CBS OK2A 1 Qtr check)**

Limited by: **CTCFASBACBU (CBS Award Summer)**

Select the **Packaging Rules 2** tab and confirm *Split Code* is **Summer**

SAVE YOUR WORK!!

**YOU ARE DONE WITH THAT
PACKAGING PLAN! 🎉**