



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.



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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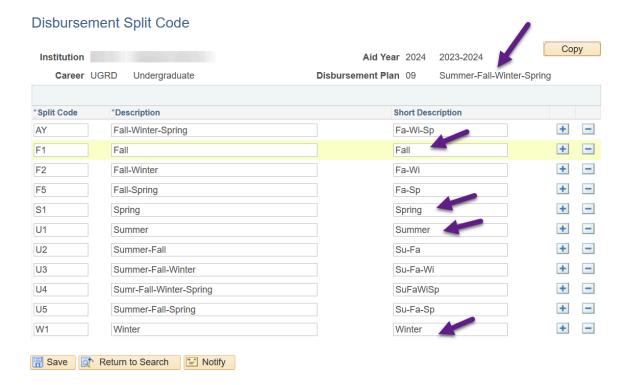
Review/Update Disbursement Split Codes

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





Header colleges will need the following disbursement split codes:

Disbursement Plan	Disbursement Split Code			
	Fall			
Fall-Winter-Spring	Winter			
	Spring			
Fall-Winter	Fall			
i an-venicei	Winter			
Fall Only	Fall			
Winter-Spring	Winter			
vinter opining	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-Fall	Summer			
	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





Trailer colleges will need the following disbursement split codes:

Disbursement Plan	Disbursement Split Code			
	Fall			
Fall-Winter-Spring	Winter			
	Spring			
Fall-Winter	Fall			
ran-winter	Winter			
Fall Only	Fall			
Winter-Spring	Winter			
winter-spring	Spring			
Winter Only	Winter			
Spring Only	Spring			
Summer Only	Summer			
	Fall			
Fall-Winter-Spring-Summer	Winter			
	Spring			
	Summer			
	Winter			
Winter-Spring-Summer	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





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 Copy Institution Aid Year 2024 2023-2024 Financial Aid Year Disbursement Plan 09 Summer-Fall-Winter-Spring Career UGRD Undergraduate Split Code W1 Winter **Even Split Option Total Disbursement:** 100.00 **Disbursement Split Percentages** Disbursement ID **Disbursement Date** Description Term 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 12/24/2023 2241 100.00 03/22/2024 04 Spring Disbursement 1 2243 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
raii-wiiitei	Winter
Fall Only	Fall
Winter-Spring	Winter
winter-spring	Spring
Winter Only	Winter
Spring Only	Spring
Summer Only	Summer
	Summer
Summer-Fall-Winter-Spring	Fall





Summer-Fall-Winter

Summer-Fall

Summer-Fall

Summer-Fall

Fall

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			
Fall-Winter-Spring	Winter			
	Spring			
Fall-Winter	Fall			
Tan-winter	Winter			
Fall Only	Fall			
Winter-Spring	Winter			
	Spring			
Winter Only	Winter			
Spring Only	Spring			
Summer Only	Summer			
	Fall			
Fall-Winter-Spring-Summer	Winter			
Tan tantel opinio	Spring			
	Summer			
	Winter			
Winter-Spring-Summer	Spring			
	Summer			
Spring-Summer	Spring			
	Summer			



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 Av	vards Setup						
Enter any i	nformation you have and	click Search. Leav	e fields blank for a list of all values.				
Find an	Existing Value						
▼ Searc	h Criteria						
Academic	Institution = v 1 Aid Year = v 2024		Q Q				
Search	Clear Basic S	earch 🗗 Save S	earch Criteria				
Awar	ds Amounts Table	MFI Setup Tabl	е				
	Academic Institution						
A	Aid Year	2024	COPY				Watch https://wsac.wa.gov/FAA-res
	Award Amounts	Per	rsonalize Find 💷 🔣	First 1-5	of 5	Last	<u>ources</u>
	MFI Percent	NonBas Award Amount	Bas Award Amount				for 2023-2024 Award
	1 60	4466	7161		+	-	Amounts table updates from WSAC
	2 65	2680	4297		+		WSAC
	3 70	2233	3581		+		
	4 75	1094	1754		+	_	
	5 100	447	716		+	_	



College Bound Setup

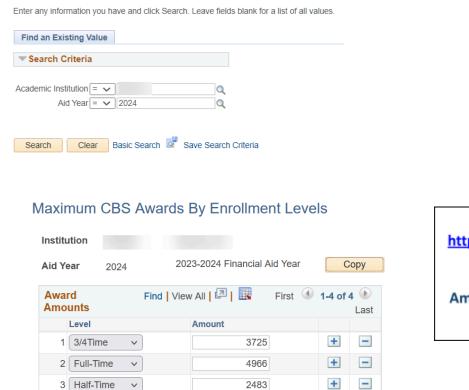
College Bound Setup

4 Qter-Time

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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.



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Watch
https://wsac.wa.gov/FAA-res
ources
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

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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:

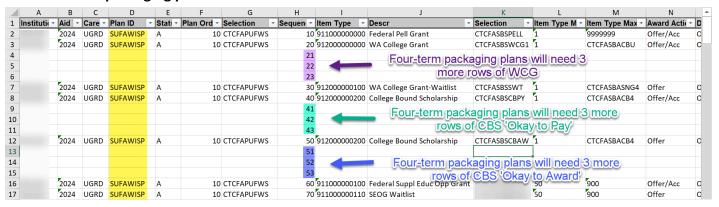
- 4 new WCG selection equation engines
- 4 new WCG award amount equations
- 4 new CBS 'Okay to Award' selection equation engines
- 4 new CBS 'Okay to Pay' selection equation engines
- 4 new CBS award amount equations

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

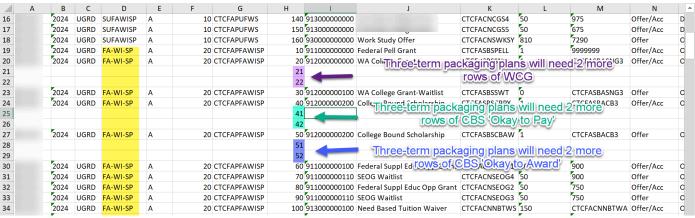


Running the CTC_FA_PACKAGING_PLANS query and downloading the results into a spreadsheet and planning out the Sequence Numbers can be helpful! Not all college's sequences are spread out by 10s between item-types like the examples provided. There are colleges who have sequence numbers right next to each 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.



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.



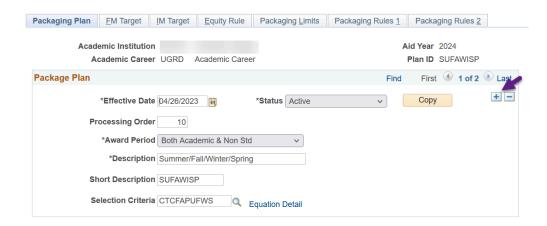


SUFAWISP or FAWISPSU Packaging Plans

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.

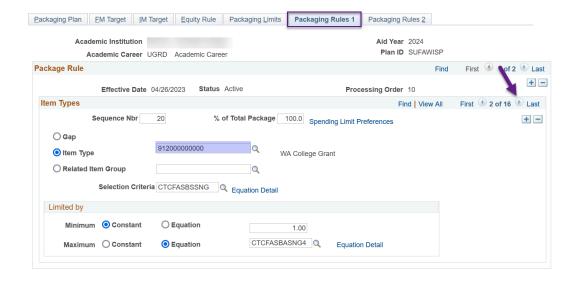
NAVIGATION: Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan

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

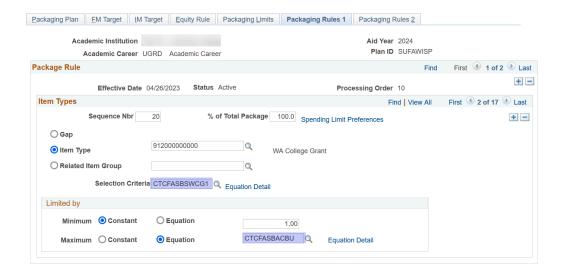




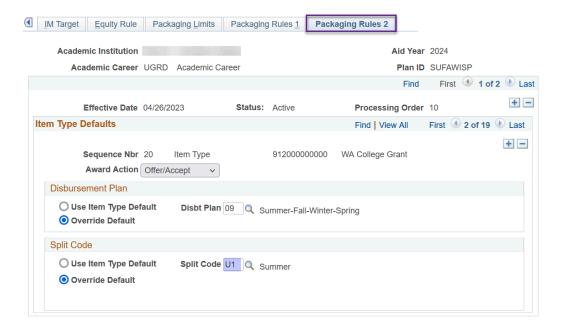
Update the following areas

Selection Criteria: CTCFASBSWCG1 (WCG 1 Qtr check)

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



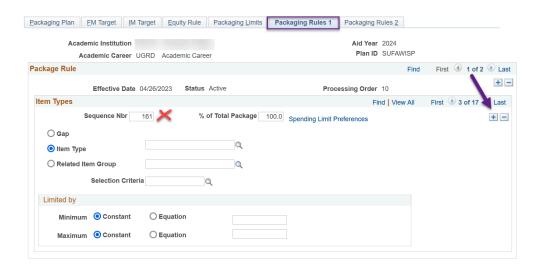
Select the Packaging Rules 2 tab and update the Split Code to Summer-header or Fall-trailer





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



Update the following areas

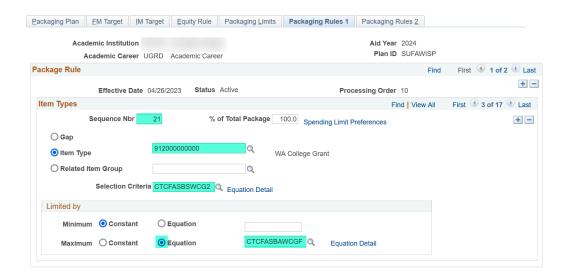
Sequence Nbr: (the next Sequence Nbr i.e. 21)

Item Type: 91200000000

Selection Criteria: CTCFASBSWCG2 (WCG 2 Qtr check)

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

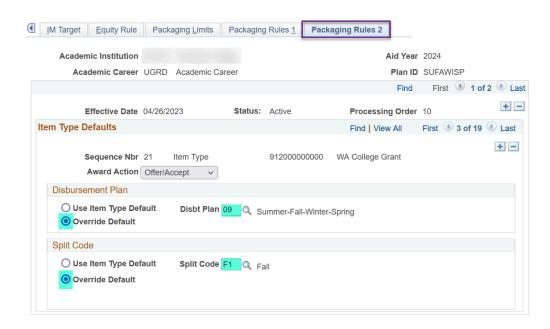
Winter)





Select the Packaging Rules 2 tab and update the following

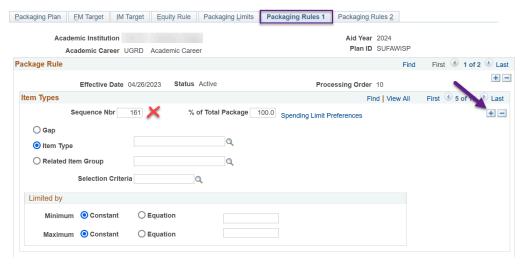
Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su Split Code: Override Default then Fall-header or Winter-trailer



THE 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





Update the following areas

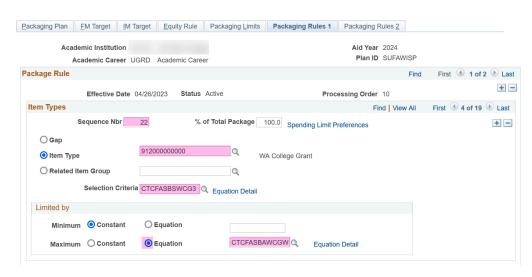
Sequence Nbr: (the next Sequence Nbr i.e. 22)

Item Type: 91200000000

Selection Criteria: CTCFASBSWCG3 (WCG 3 Qtr check)

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

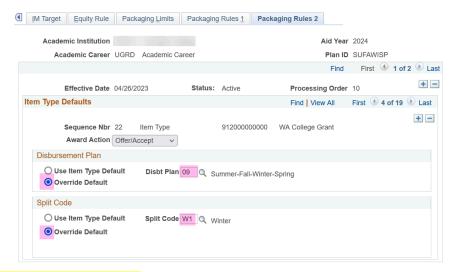
Spring)



Select the Packaging Rules 2 tab and update the following

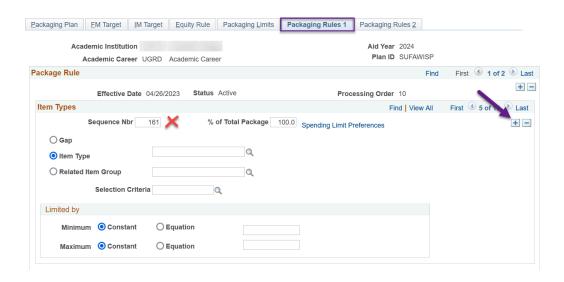
Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su Split Code: Override Default then Winter-header or Spring-trailer





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



Update the following areas

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

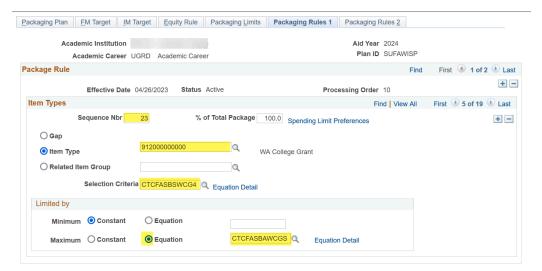
Item Type: 91200000000

Selection Criteria: CTCFASBSWCG4 (WCG 4 Qtr check)

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

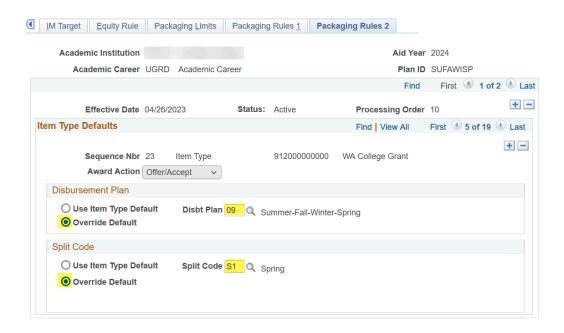
Summer)





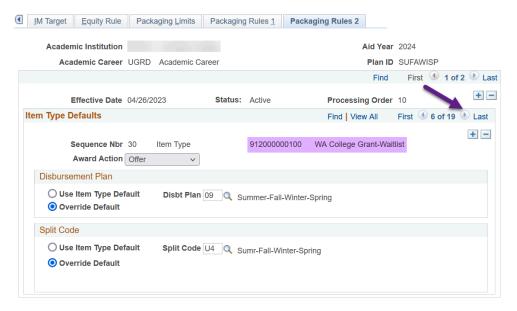
Select the Packaging Rules 2 tab and update the following

Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su Split Code: Override Default then Spring-header or Summer-trailer

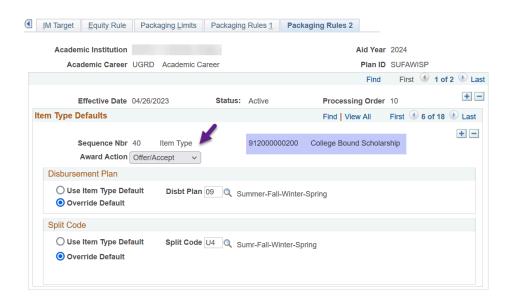


Toggle to the **WCG Waitlist** item-type (912000000**100**) by selecting the right arrow once. Select the **minus sign** in the *Item Type Defaults* section to remove the item-type from the packaging plan. The new CBS equation engines are not dependent on this item-type being in the packaging plan.





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



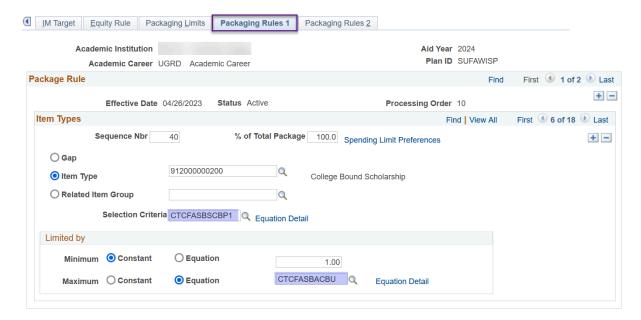
THE FIRST ROW OF CBS 'Okay to Pay' will be tied to the 1st quarter in your packaging plan: Summer quarter for headers versus Fall quarter for trailers.

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

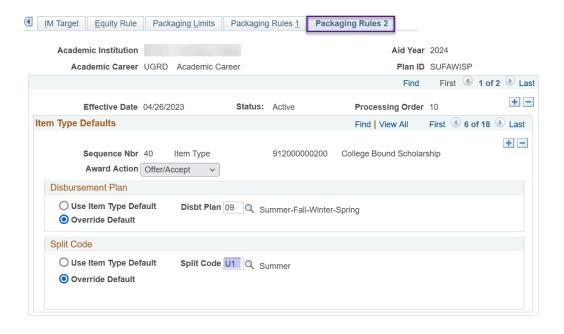
Selection Criteria: CTCFASBSCBP1 (CBS OK2P 1 Qtr check)

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





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

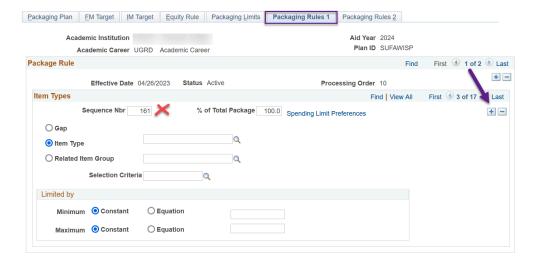


THE SECOND ROW OF CBS 'Okay to Pay' will be tied to the 2nd quarter in your packaging plan: Fall quarter for headers versus Winter quarter for trailers.

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



WCG & CBS Enrollment-Based Packaging Setup





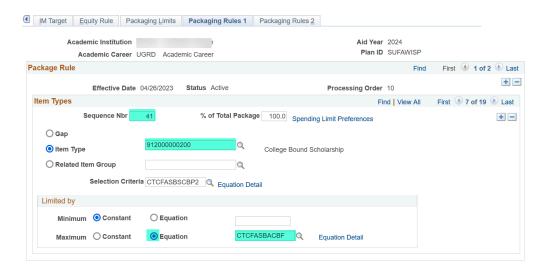
Update the following areas

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

Item Type: 91200000200

Selection Criteria: CTCFASBSCBP2 (CBS OK2P 2 Qtr check)

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

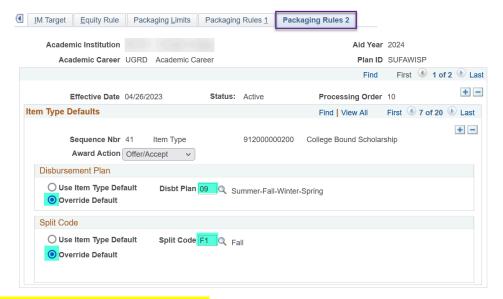


Select the Packaging Rules 2 tab and update the following

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

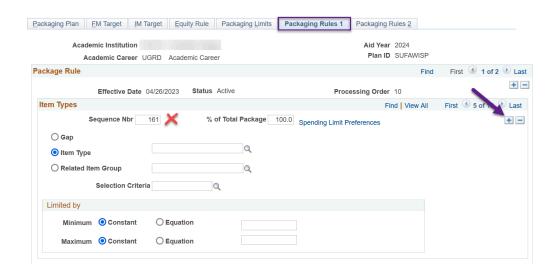
Split Code: Override Default then Fall-header or Winter-trailer





THE 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



Update the following areas

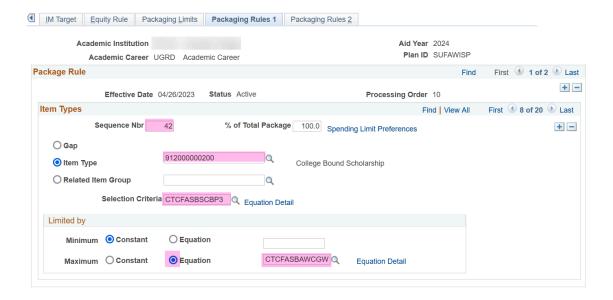
Sequence Nbr: (the next Sequence Nbr i.e. 42)

Item Type: 91200000200

Selection Criteria: CTCFASBSCBP3 (CBS OK2P 3 Qtr check)

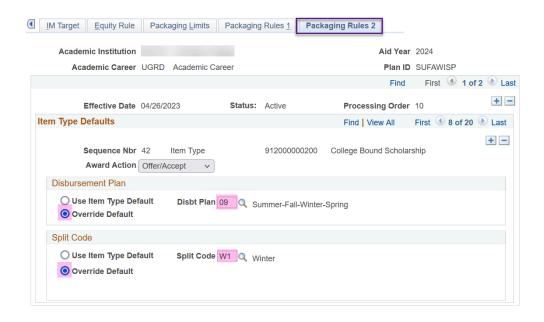
Limited by: CTCFASBACBW (CBS Award Winter) or CTCFASBACBS (CBS Award Spring)





Select the Packaging Rules 2 tab and update the following

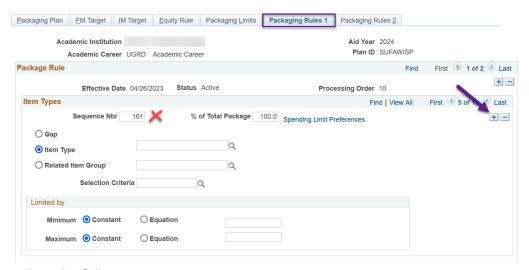
Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su Split Code: Override Default then Winter-header or Spring-trailer



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.



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



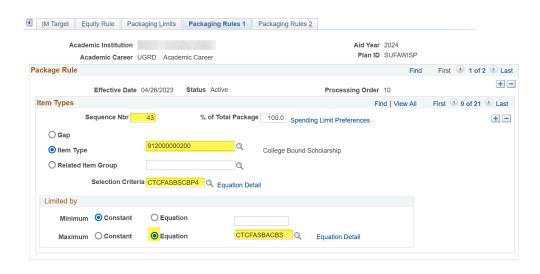
Update the following areas

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)

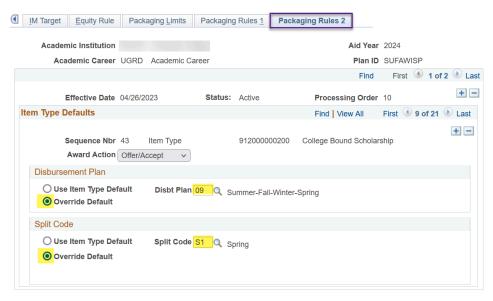


Select the Packaging Rules 2 tab and update the following

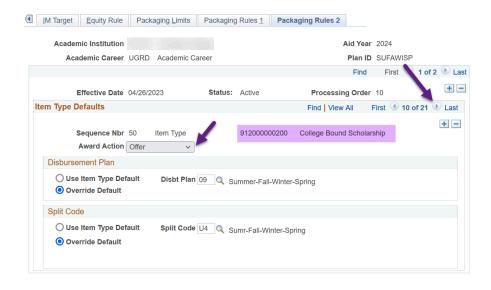
Disbursement Plan: Override Default then Su-Fa-Wi-Sp or Fa-Wi-Sp-Su



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' \bigcirc



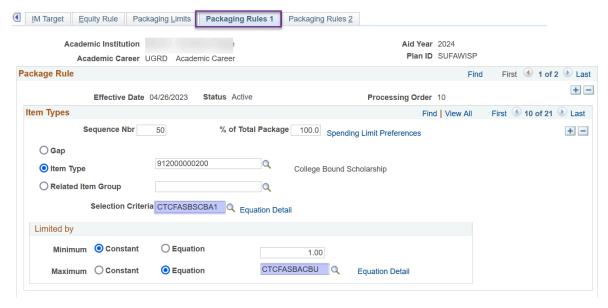
THE FIRST ROW OF CBS 'Okay to Award' will be tied to the 1st quarter in your packaging plan: Summer quarter for headers versus Fall quarter for trailers.

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

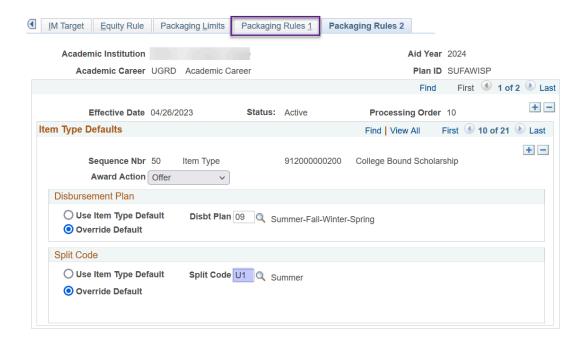
Selection Criteria: CTCFASBSCBA1 (CBS OK2A 1 Qtr check)



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



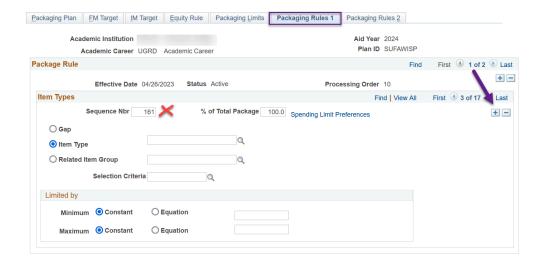
Select the Packaging Rules 2 tab and update the Split Code to Summer-header or Fall-trailer



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



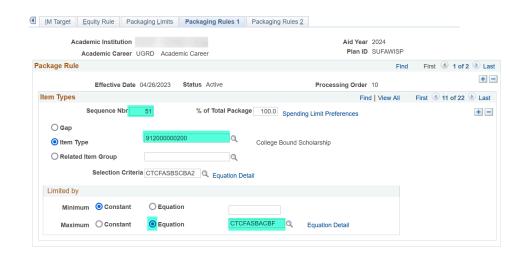
Update the following areas

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

Item Type: 91200000200

Selection Criteria: CTCFASBSCBA2 (CBS OK2A 2 Qtr check)

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



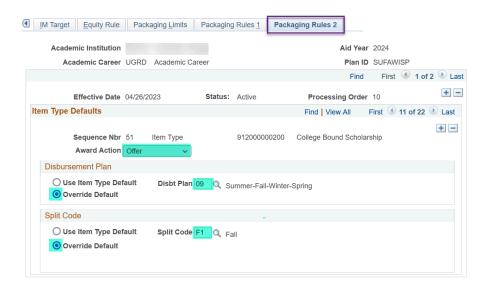
Select the Packaging Rules 2 tab and update the following

Award Action: Offer

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



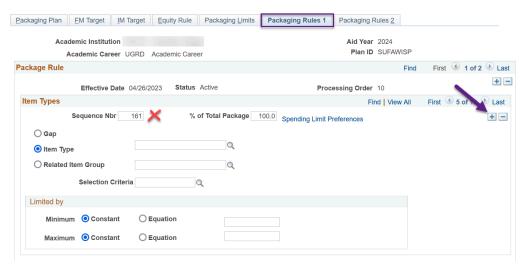
Split Code: Override Default then Fall-header or Winter-trailer





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



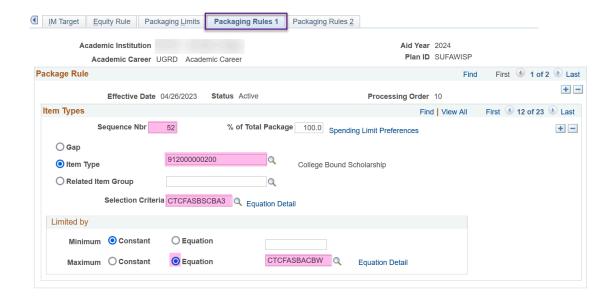
Update the following areas

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

Item Type: 91200000200

Selection Criteria: CTCFASBSCBA3 (CBS OK2A 3 Qtr check)

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



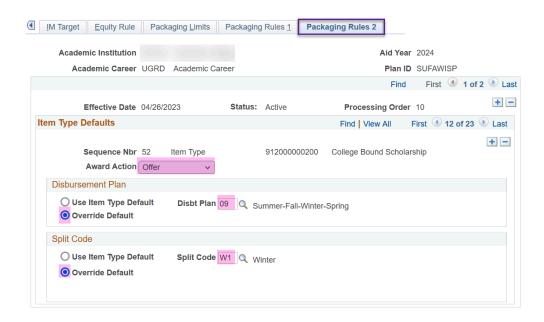


Select the Packaging Rules 2 tab and update the following

Award Action: Offer

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

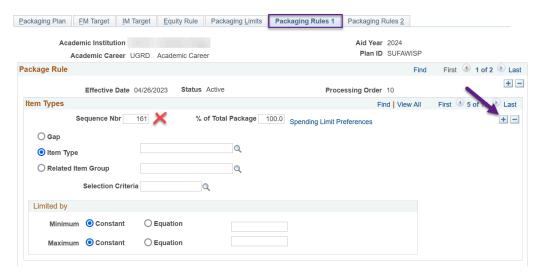
Split Code: Override Default then Winter-header or Spring-trailer



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





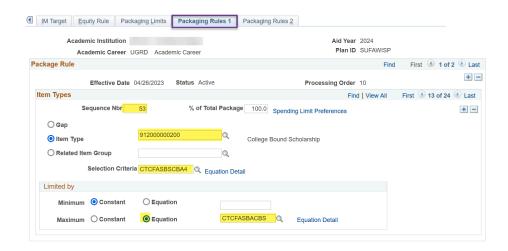
Update the following areas

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)

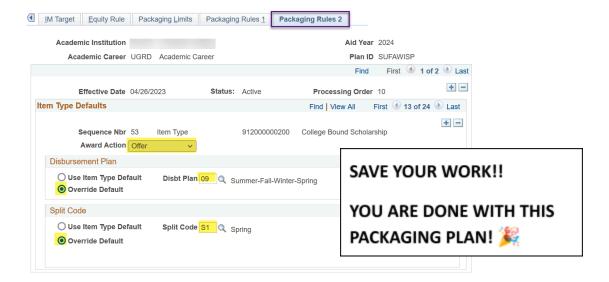


Select the Packaging Rules 2 tab and update the following

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



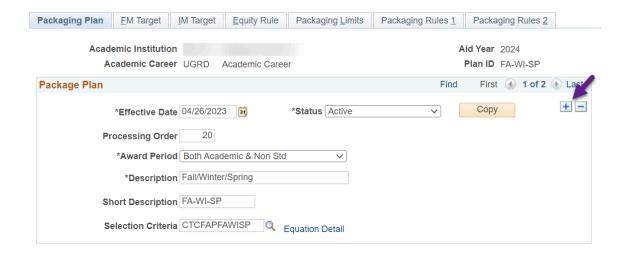


FA-WI-SP Packaging Plan

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 (91200000000) 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: **91200000000**

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: 91200000000

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 (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: 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: **91200000200**

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: **91200000200**

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: **91200000200**

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: **91200000200**

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 R	Rule Packaging Limits Packaging Rules 1 Packaging Rules 2
Academic Institution Academic Career UGRD Academic	Aid Year 2024 Career Plan ID SU-FA-WI
Package Plan	Find First 1 of 2 1 of 2
*Effective Date 04/26/2023	*Status Active Copy
Processing Order 30	
*Award Period Both Academic & No	on Std 🗸
*Description Summer/Fall/Winter	•
Short Description SU-FA-WI	
Selection Criteria CTCFAPSUFAWI	Q 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 (91200000000) 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: **91200000000**

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: **91200000000**

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 (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: **91200000200**

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: 91200000200

Selection Criteria: CTCFASBSCBP3 (CBS OK2P 3 Qtr check)

Limited by: CTCFASBACBW (CBS 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 CBS 'Okay to Award' row by selecting the right arrow once. The 'Okay to Award' row will have an Award Action status of 'Offer' \bigcirc

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: 91200000200

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: **91200000200**

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 <u>L</u> imits	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 1 left		
	*Effective Da	04/26/202	3 31	*Status Active	~	Сору		
Pr	ocessing Ord	er 50						
	*Award Perio	Both Acad	emic & Non Std	V				
	*Description	winter/Spr	ing/Summer					
SI	nort Descriptio	on WI-SP-SU						
S	election Criter	ia CTCFAPW	/ISPSU Q	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 (91200000000) 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: **91200000000**

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: 91200000000

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 (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: 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: **91200000200**

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: 91200000200

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' \bigcirc

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: 91200000200

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: **91200000200**

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	FM Target	IM Target	Equity Rule	Packaging <u>L</u> imits	Packaging Rules 1	Packaging Rules 2
	emic Institutio		Academic Care	er		id Year 2024 Plan ID FA-WI
Package Plan					Find	First 1 of 1 First
	*Effective Da	te 09/22/202	2 🛐	*Status Active	~	Сору
Pr	rocessing Ord	er 20				
	*Award Perio	Both Acad	emic & Non Std	~		
	*Description	Fall/Winte				
SI	hort Description	on FA-WI				
S	election Criter	cTCFAPF	AWI Q	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: 91200000000

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 (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: 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: 91200000200

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 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' \bigcirc

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: **91200000200**

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	FM Target	IM Target	Equity Rule	Packaging <u>L</u> imits	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	● st	
	*Effective Dat	04/26/202	3	*Status Active	~	Сору	+ -	
Pr	rocessing Orde	er 40						
	*Award Perio	d Both Acad	emic & Non Std	V				
	*Descriptio	n Winter/Spi	ing					
St	hort Descriptio	n WI-SP						
S	election Criter	ia CTCFAPV	/ISP Q	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 (91200000000) 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: **91200000000**

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 (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: 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: **91200000200**

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' co

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: **91200000200**

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 FM Target	IM Target Equity Rule	Packaging <u>Limits</u>	Packaging Rules 1	Packaging Rules 2	
Academic Institution Academic Career		or.		id Year 2023 Plan ID SU-FA	
Package Plan			Find	First 1 of 7	E ast
*Effective Date	04/26/2023	*Status Active	~	Сору	+-
Processing Order	40				
*Award Period	Both Academic & Non Std	~			
*Description	Summer/Fall				
Short Description	SU-FA				
Selection Criteria	CTCFAPSUFA Q E	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: **91200000000**

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: **91200000200**

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' \bigcirc

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: **91200000200**

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!



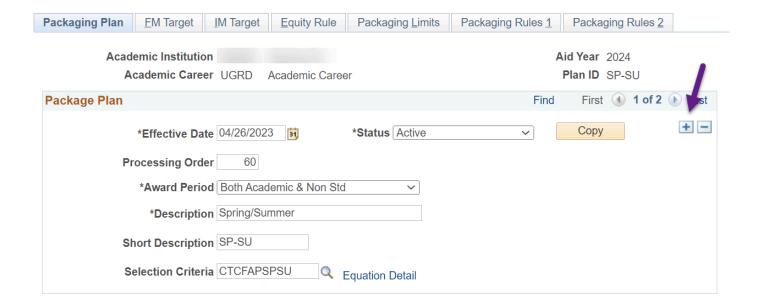
SP-SU Packaging Plan **TRAILER ONLY**

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



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 (91200000000) 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: **91200000000**

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 (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: 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: **91200000200**

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: **91200000200**

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! 🎉





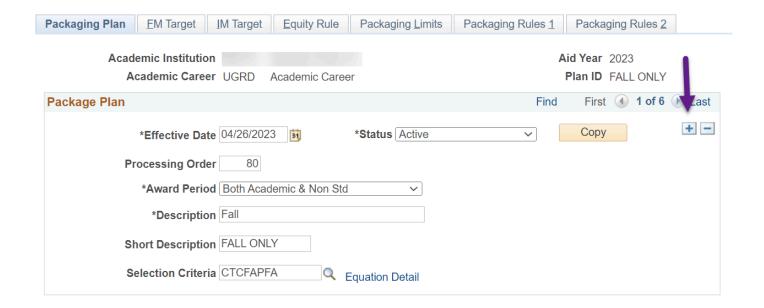
FALL ONLY Packaging Plan

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



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 (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'!





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' \bigcirc

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!



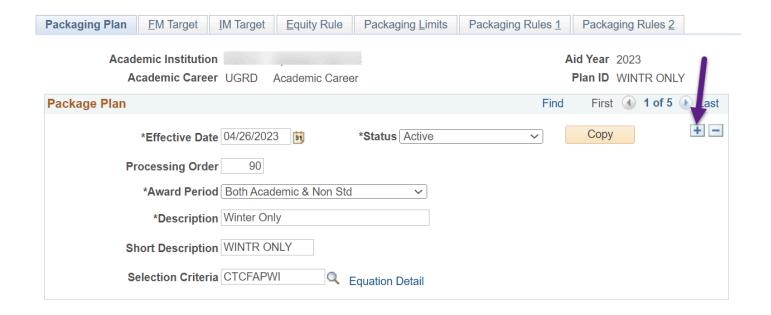
WINTR ONLY Packaging Plan

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



Select the Packaging Rules 1 tab then toggle to the WCG item-type (91200000000) 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 (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'!





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' \bigcirc

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!



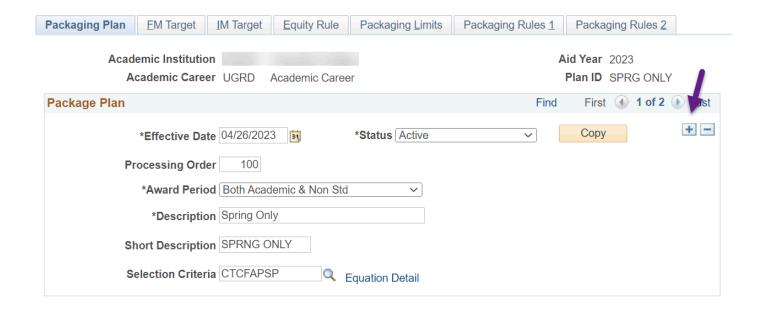
<u>SPRG ONLY Packaging Plan</u>

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



Select the Packaging Rules 1 tab then toggle to the WCG item-type (91200000000) 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 (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'!





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' \bigcirc

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!



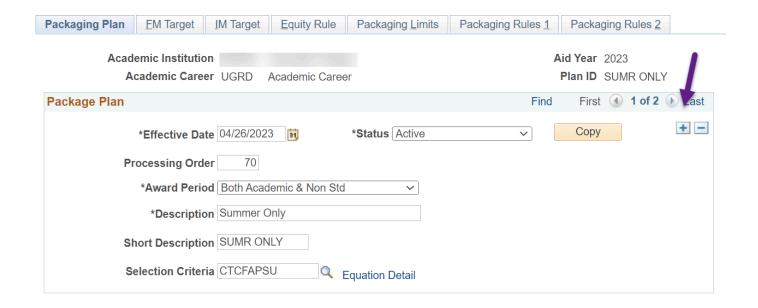
SUMR ONLY Packaging Plan

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



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 (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'!





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' \bigcirc

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!