Chapter 33

Managing Repackaging

Understanding Repackaging

Using repackaging, you can award financial aid for groups of students. An equation, a PS Query, or an external file can identify the group of students for repackaging. You can then associate one or more repackaging plans to that population. You can evaluate your selected population and the repackaging plan associated with each student first. The system selects the optimum repackaging plan for each student based on the combination of your repackaging equations and the processing order of the repackaging plan. Then the system applies the repackaging plan against those selected students, awarding each student based on the defined repackaging plan rules.

Three processes are run as part of repackaging. The first process selects students for evaluation. The second process assigns repackaging plans to students. The third process reviews the student's eligibility, the program rules, and other eligibility criteria and then decreases, increases, or validates existing awards, or assigns new awards to students using the assigned repackaging plans. After the first two processes, you can review the students being selected and the assigned repackaging plans. You can also review the order in which the students are repackaged, again by repackaging plan. You can delete students who should not be repackaged. Finally, you can run the third process in live mode or in simulation mode to review expected repackaging results.

Before repackaging, consider the results that you want the system to produce according to your institution's repackaging philosophies. Determine the student attributes to use in the repackaging equations to select the correct students for each repackaging plan. Review the criteria that each repackaging plan uses to select students. If some of the selected students cannot be matched to any of your repackaging plans, review the list of these students to determine why they did not get matched. Adjust your equations to ensure that these students are assigned correctly.

Unlike Packaging, during Repackaging locked awards are always preserved and unchanged, even if the student is in an overaward situation.

During the loading of external awards, an EA lock attribute is set, such that external awards are treated as locked awards during Repackaging. External awards are always preserved and unchanged, even if the student is in an overaward situation. When the EA lock is set, you cannot remove it.

Note: Your repackaging plans must be established before you begin repackaging; if you change the selection criteria in either Equations or PS Query, rerun the Batch Repackaging Selection routine. If you make changes to your repackaging plans, rerun the Assign Repackaging plans routine before running the Batch Repackaging process. Changing any repackaging plan selection criteria (tied at the plan level) after students have been assigned to repackaging plans may produce incorrect or undesirable results. You should run Need Summary Validation before performing any Repackaging activities.

Related Links

Setting Up a Repackaging Plan

Need Summary Validation

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Loading Data to the Student Award Table

Running the Need Summary Validation Process

This section discusses how to select students for Need Summary Validation.

Page Used to Run the Need Summary Validation Process

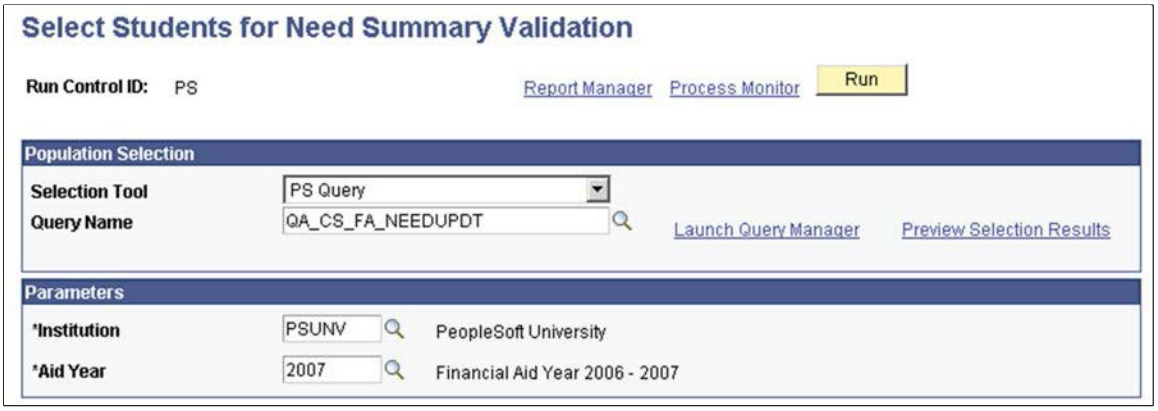
Page Name	*Definition Name*	*Navigation*	*Usage*
Select Students for Need Summary Validation	SFA-RUN-NEEDUPD	Financial Aid, Awards, Need Summary Validation, Select Students for Need Summary Validation	Update the needs summary to reflect changes made to Cost of Attendance (COA) or Effective Family Contribution (EFC).

Selecting Students for Need Summary Validation

Access the Select Students for Need Summary Validation page (Financial Aid, Awards, Need Summary Validation, Select Students for Need Summary Validation).

Image: Select Students for Need Summary Validation page

This example illustrates the fields and controls on the Select Students for Need Summary Validation page. You can find definitions for the fields and controls later on this page.



Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.0: Campus Community).

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Selection Tool Select one of these values: *Equation Engine*, *PS Query*, or *External File*. Additional parameters appear for your selected tool.

Query Name For PS Query, select a population selection query that joins with the bind record SFA-BNSV-BIND, which does not require a career.

Performing Batch Repackaging

This section discusses how to:

- Select students for repackaging.
- Review students selected for batch repackaging.
- Assign repackaging plans to selected students.
- Review repackaging plans assigned by query.
- Review repackaging plans by students.
- Repackage groups of students.
- Review batch repackaging summary.
- Review eligibility and need after repackaging.
- Review batch repackaging details.
- Review batch repackaging errors.

Pages Used to Perform Batch Repackaging

Page Name	*Definition Name*	*Navigation*	*Usage*
Select Students for Repackaging	SFA-RUN-RPKG-SEL	Financial Aid, Awards, Repackaging, Select Students to Repackage, Select Students for Repackaging	Define the population of students to repackage for award eligibility.
Batch Repackaging Students	SFA-RPKG-STDNTLIST	Financial Aid, Awards, Repackaging, View Selected Students, Batch Repackaging Students	View a list of students selected for repackaging. Optionally, select *Valid* or *Invalid* for Process Status.
Assign Repackaging Plan	SFA-RUN-RPKG-ASN	Financial Aid, Awards, Repackaging, Assign Repackaging Plans, Assign Repackaging Plan	For a selected population, assign one or more repackaging plans.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Batch Repackaging Plans Assigned	SFA-RPKG-PLAN-INQ	Financial Aid, Awards, Repackaging, View Assigned Plans, Batch Repackaging Plans Assigned	View all the students assigned to each repackaging plan.
Batch Repackaging Students by Plan	SFA-RPKG-STDNTPLAN	Financial Aid, Awards, Repackaging, View Students by Plan, Batch Repackaging Students by Plan	View individual students and the repackaging plan assigned to each, sorted by specified sort field.
Repackage Students in Batch	SFA-RUN-RPKG	Financial Aid, Awards, Repackaging, Process Batch Repackaging, Repackage Students in Batch	Repackage a select group of students using their assigned repackaging plans.
Batch Repackaging Summary	SFA-BRPKG-SUMM	Financial Aid, Awards, Repackaging, View Batch Repackaging Summary, Batch Repackaging Summary	Display all repackaging plans, number of students selected, number repackaged, and number not repackaged.
Eligibility and Need	SFA-BRPKG-STUDTL	Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Eligibility and Need	View eligibility and need details for a student after repackaging.
Award Detail	SFA-BRPKG-AWDDTL	Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Award Detail	View award details for a student after repackaging.
Batch Repackaging Errors	SFA-BRPKG-ERROR	Financial Aid, Awards, Repackaging, View Batch Repackaging Errors, Batch Repackaging Errors	View message number and error detail for each student for whom repackaging failed.

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Selecting Students for Repackaging

Access the Select Students for Repackaging page (Financial Aid, Awards, Repackaging, Select Students to Repackage, Select Students for Repackaging).

Image: Select Students for Repackaging page

This example illustrates the fields and controls on the Select Students for Repackaging page. You can find definitions for the fields and controls later on this page.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.0: Campus Community).

Select the Population Selection check box.

Image: Select Students for Repackaging: Population Selection check box

This example illustrates the fields and controls on the Select Students for Repackaging: Population Selection check box. You can find definitions for the fields and controls later on this page.

Population Selection Select to use Population Selection to define the student population.

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Selection Tool

Appears if Population Selection check box is selected. Select from *Equation Engine*, PS Query, or *External File.* Additional parameters are displayed for your selected tool.

Query Name

Appears only when PS Query is selected. Select a PS Query that selects a population using one of these bind records

- SFA-BRPKGX-BIND, if population selection is not based on career
- SFA-BRPKG-BIND, if population selection is based on career

Equation Name

If you select *Equation Engine*, the Equation Name field appears. Select an equation that is defined with the application prompt Batch Repackaging Selection.

Processing Status Selection

If the Population Selection check box is not selected, the Processing Status Selection appears.

Aid Processing Status

Select *Repackage* or any status that indicates that the student has been previously packaged and needs to be reevaluated. The External Award Load process assigns the *Repackage* status to any student who has a Loan Certification Request as an external award or if the student's Aid Processing status is *Complete.*

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Reviewing Students Selected for Batch Repackaging

Access the Batch Repackaging Students page (Financial Aid, Awards, Repackaging, View Selected Students, Batch Repackaging Students).

Image: Batch Repackaging Students page

This example illustrates the fields and controls on the Batch Repackaging Students page. You can find definitions for the fields and controls later on this page.

Process Status Indicates whether the student is processed *(Valid)* or not processed *(Invalid)* in the next Repackaging run.

You can delete the student's row or change the Process status to *Invalid* to remove a student from this repackaging batch. If students have multiple careers, a row exists for each career for which they can be repackaged.

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Assigning Repackaging Plans to Selected Students

Access the Assign Repackaging Plan page (Financial Aid, Awards, Repackaging, Assign Repackaging Plans, Assign Repackaging Plan).

Image: Assign Repackaging Plan page

This example illustrates the fields and controls on the Assign Repackaging Plan page. You can find definitions for the fields and controls later on this page.

From the Selection Definition list, select the name of the student group defined on the Select Students for Repackaging page. Then define the repackaging plan for this group of students.

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Repackaging Plan Parameters

Career

Select the academic career to process during this Repackaging run.

Repackaging Plan

Select from the list of repackaging plans for this aid year and career.

Sort Field

Select a field on which to sort students within each plan. Then select ascending or descending order from the Sort Order field. Sort field and sort order determine the order in which students are repackaged. For example, to repackage students with the lowest Federal EFC first and students with the highest Federal EFC last, select *FED_EFC* and then a sort order of *Ascending*.

Select from:

- *ADJ_PAR_CONTRIB* (Adjusted Parent Contribution)
- *AGI_PAR* (Parents' Adjusted Gross Income)
- *AGI_STU* (Students' Adjusted Gross Income)
- *EMPLID* (Employee ID)
- *FED_EFC* (Federal Effective Family Contribution)
- *FED_NEED* (Federal Need)
- *FED_PARENT_CONTRB* (Federal Parent Contribution)
- *FED_STDNT_CONTRB* (Federal Student Contribution)
- *INST_EFC* (Institutional Effective Family Contribution)
- I*NST_PARENT_CONTRB* (Institutional Parent Contribution)
- *INST_STDNT_CONTRB* (Institutional Student Contribution)
- *PRORATED_EFC* (Prorated Effective Family Contribution)
- *TRANS_PROCESS_DT* (Transaction Process Date)

Note: Do not use *FED_EFC* for repackaging plans that have a non-standard award period. FED-EFC represents the PRIMARY-EFC, which is the 9-month EFC that is synonymous with the academic award period. Therefore, all non-standard award period FED-EFC values equal 0.00. If you sort by FED-EFC for non-standard plans, the system defaults the sort order to EMPLID.

Sort Order

Based on the selected sort field, select *Ascending* to order students from lowest to highest or *Descending* to order students from highest to lowest. See Sort Field.

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Reviewing Repackaging Plans Assigned by Query

Access the Batch Repackaging Plans Assigned page (Financial Aid, Awards, Repackaging, View Assigned Plans, Batch Repackaging Plans Assigned).

Image: Batch Repackaging Plans Assigned page

This example illustrates the fields and controls on the Batch Repackaging Plans Assigned page. You can find definitions for the fields and controls later on this page.

To further identify each repackaging plan, the page lists the student's career, the sort field and order from the Assign Repackaging Plan page, and the plan order from the repackaging plan setup.

In this example, Patrick Quijano (FARPK0045) did not meet any of the selection criteria of the repackaging plans defined on the Assign Repackaging Plans page. The batch routine did not assign him a repackaging plan.

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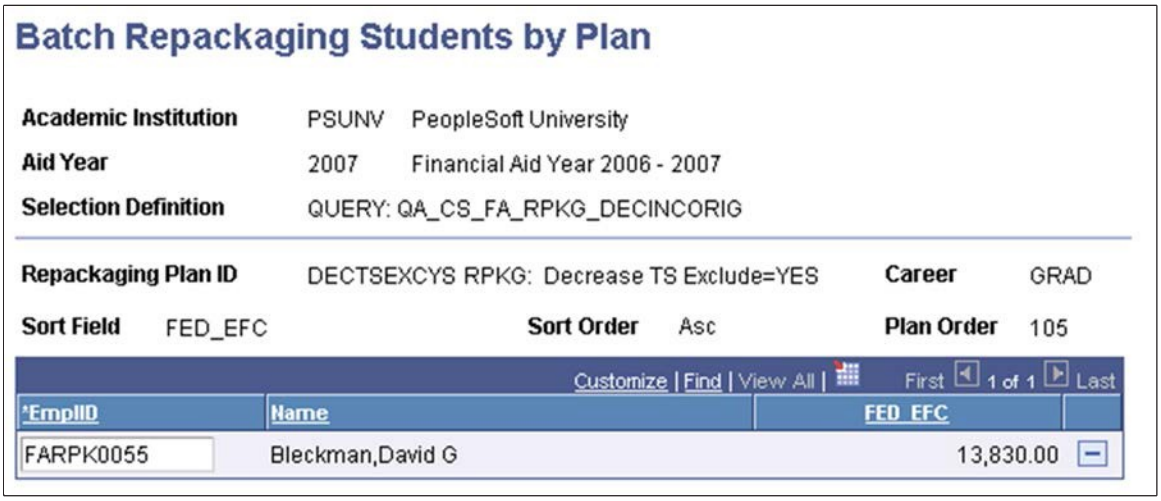
The Sort Field field displays the value of the FED-EFC sort field, which was defined on the Assign Repackaging Plans page.

Reviewing Repackaging Plans by Students

Access the Batch Repackaging Students by Plan page ((Financial Aid, Awards, Repackaging, View Students by Plan, Batch Repackaging Students by Plan).

Image: Batch Repackaging Students by Plan page

This example illustrates the fields and controls on the Batch Repackaging Students by Plan page. You can find definitions for the fields and controls later on this page.



For each repackaging plan, the page displays the repackaging plan ID, career, and sort field and sort order from Assign Repackaging Plan page. The plan order is the processing order for the repackaging plan from the repackaging plan setup.

For each repackaging plan, the selected students are listed as sorted by the sort field and sort order. In this example, the students are listed in ascending FED-EFC order, as defined on the Assign Repackaging Plans page. The Sort Field column, such as FED-EFC, lists the FED-EFC value.

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Repackaging Groups of Students

Bundle 39
Added optional "Methodology" parameter to the process.

Access the Repackage Students in Batch page (Financial Aid, Awards, Repackaging, Process Batch Repackaging, Repackage Students in Batch).

Selection Definition

From the Selection Definition list, select the name of the student group defined on the Select Students for Repackaging page.

Methodology

Select which need analysis Methodology to use: *Federal*, *Institutional*, or *Both*.

This is an optional field where Federal is the default value. It is an information-only field that allows users to define with which Methodology the batch was repackaged.

Live

Select this mode to run the process and commit the awards to the database. This includes tables such as student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log.

Note: Oracle recommends that you run in Simulation mode at least once before running in Live mode.

Simulation

Select this mode to simulate and view results. You can then refine your repackaging plan rules and rerun Batch Repackaging Simulation to produce the desired award amounts. When you are satisfied with the Simulation results, rerun Batch Repackaging in Live mode.

Reviewing Batch Repackaging Summary

Bundle 39
Added "Methodology" field to display.

Access the Batch Repackaging Summary page (Financial Aid, Awards, Repackaging, View Batch Repackaging Summary, Batch Repackaging Summary).

Batch Number

Displays the number that is assigned to the batch of students when you run the Repackaging process.

Batch Date Time

Displays the date and time that you ran the Repackaging process for this batch of students.

Live vs. Simulation

Displays whether the Repackaging process was run in *Live* or *Simulation* mode. Values are:

Live: The Repackaging process updated all award-related tables.

Simulation: You can review the results of the Repackaging process, but award-related tables were not updated.

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Methodology	Displays which need analysis Methodology was specified during the repackaging run: *Federal*, *Institutional*, or *Both*.
Repackaging Plan ID	Displays the repackaging plan used in this Repackaging process.
Total Selected	Displays the total number of students assigned to this repackaging plan.
Total Packaged	Displays the total number of students who were successfully repackaged using this repackaging plan.
Total Not Packaged	Displays the total number of students who were assigned this repackaging plan but did not receive any awards because of one or more errors.

Reviewing Eligibility and Need After Repackaging

Access the Eligibility and Need page (Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Eligibility and Need).

Image: Eligibility and Need page

This example illustrates the fields and controls on the Eligibility and Need page. You can find definitions for the fields and controls later on this page.

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This information is for a single repackaging plan. To view other students, use the Eligibility Summary scroll arrows. To view further information for this student, use the Need Summary by Award Period scroll arrows.

Eligibility Summary

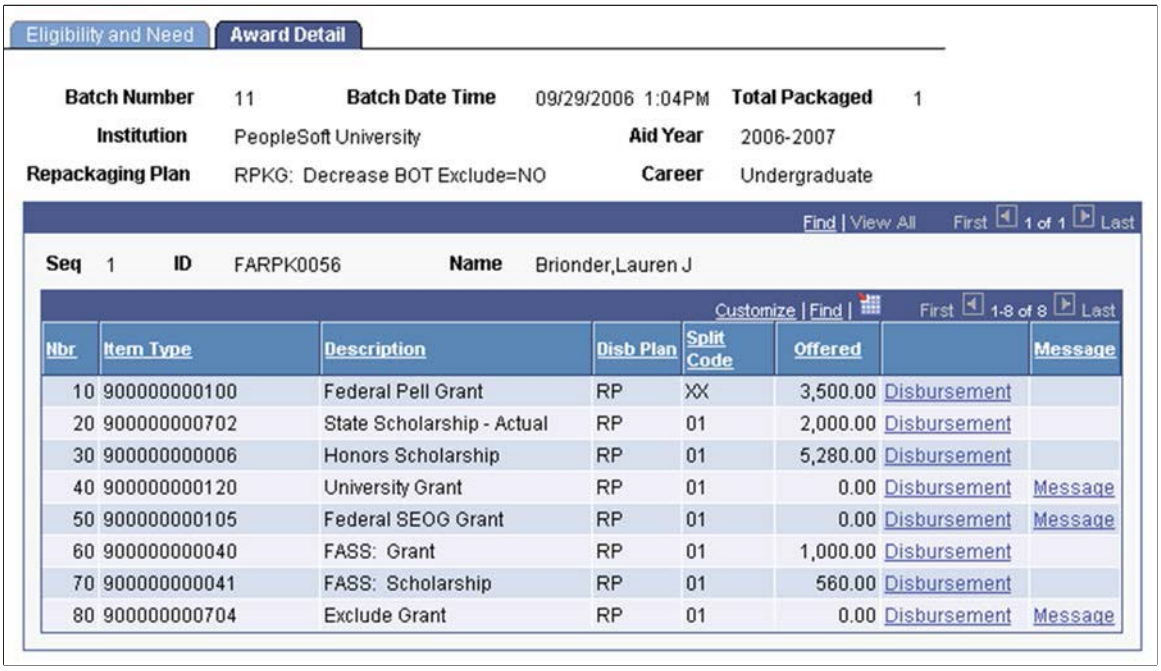
Sequence	Indicates the order in which students were repackaged during the Repackaging process.
Federal Dependency Status	Indicates whether the student is dependent or independent under federal methodology.
Institutional Dependcy Status (institutional dependency status)	Indicates whether the student is dependent or independent under institutional methodology.
Federal PELL Eligibility	Indicates whether the student is eligible to receive a Pell Grant.
Received First Bachelor Degree	Indicates whether the student has already received his or her first bachelor's degree.
Title IV Eligibility	Indicates whether the student is eligible to receive federal Title IV aid.

Reviewing Batch Repackaging Details

Access the Award Detail page (Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Award Detail).

Image: Award Detail page

This example illustrates the fields and controls on the Award Detail page. You can find definitions for the fields and controls later on this page.



All awards in the repackaging plan are listed as zero or nonzero awards. Nonzero awards display a link to the scheduled disbursements.

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Seq (student sequence) Indicates the order in which students were repackaged during the Repackaging process.

Nbr (award number) The sequence number is automatically assigned in increments of ten when awards are entered.

Item Type The financial aid item type of the student's award.

Disb Plan (disbursement plan) The disbursement plan that is assigned to the student's award.

Split Code The split code of the student's award, which indicates how the award is split for disbursement to the student.

Offered If the offered amount for an award is 0.00, then the student was not eligible for that particular award or it was an unlocked, pre-existing award. The zero awards are not visible after the student's award package is posted.

Disbursement Click to access the Batch Repackaging Disbursement page and view scheduled disbursement detail for an award.

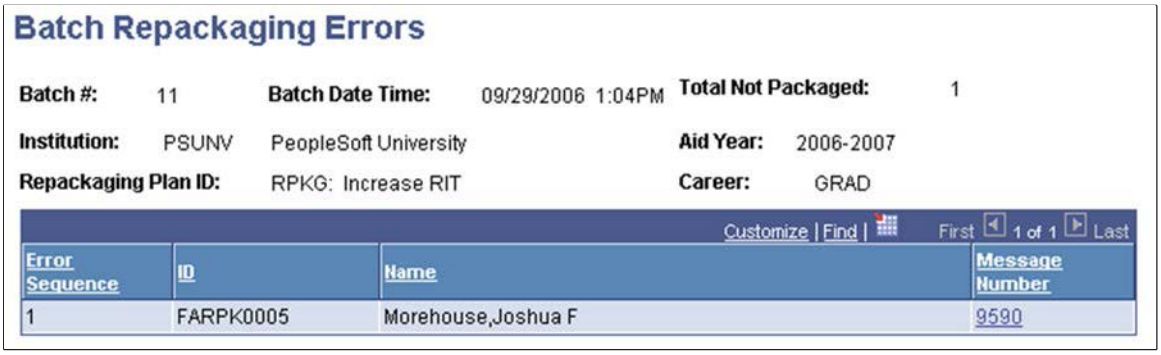
Message Click to access the Batch Repackaging Message page and view the reason that the student did not receive this award.

Reviewing Batch Repackaging Errors

Access the Batch Repackaging Errors page (Financial Aid, Awards, Repackaging, View Batch Repackaging Errors, Batch Repackaging Errors).

Image: Batch Repackaging Errors page

This example illustrates the fields and controls on the Batch Repackaging Errors page. You can find definitions for the fields and controls later on this page.



Only students who had serious errors, such as students who had their financial aid term deleted, are in this list.

Batch # The batch number identifies the particular Repackaging session.

Batch Date Time The date and time that the Repackaging session was run.

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Total Not Packaged The total number of students who were assigned to the repackaging plan but were not repackaged due to an error.

Error Sequence The key by which the error data is sorted.

ID The ID of the student who was not repackaged.

Message Number Click to view the error message.

Repackaging Error Messages

Message Number	*Message Text*	*Explanation*
9221	Repackaged award does not exist; Item Type rejected.	This item type was entered into the Packaging process during repackaging and is marked as a change or cancel. However, the item type does not exist at this stage in the student's current package. As a result, it is being discarded.
9223	Repackaging: Item Type award amount has been decreased.	This item type is being processed in Repackaging for a decrease, and has either been decreased to a lower award amount or set to a 0.00 value and canceled.
9224	Repackaging: Item Type Increase does not meet increase threshold; rejected.	This item type is being processed in Repackaging for an increase, but the need or cost of attendance threshold for the package has not been met. As a result, the item type is rejected.
9225	Item Type with disbursements canceled.	This disbursed award has been canceled. The item type does not meet disbursement protection rules.
9226	Item Type decrease does not meet decrease threshold; rejected.	This item type is being processed in Repackaging for a decrease, but the need or cost of attendance threshold for the package has not been met. As a result, the item type is rejected.
9506	This student was not assigned to a Packaging, or Repackaging, Plan.	The student did not meet the selection criteria for the packaging or repackaging plans defined for the specified career.
9528	Award was auto-canceled.	The award was canceled by an Auto Cancel item type.

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Message Number	*Message Text*	*Explanation*
9544	Invalid equation data for Selection Criteria at the Packaging, or Repackaging, Plan level.	Incorrect or inconsistent equation data is associated with the selection criteria at the packaging or repackaging plan level.
9590	Student has no awards for the specified academic career.	The student cannot be repackaged because no awards exist for the specified academic career.
9591	Student does not have a Packaging Plan.	The Repackaging rule is Original Packaging Plan, but the packaging plan ID is missing from STDNT-AID -ATRBT. Please contact your system administrator for assistance.
9592	Number of Auto-cancel Item Types exceeds the size of an internal table.	The total number of auto-cancel item types exceeds the size of an internal table. Please contact your system administrator for assistance.
9593	Unable to sequence new award as desired.	The system was unable to assign a PKG-SEQ-NBR that would sequence the new award as desired. Please contact your system administrator for assistance.
9594	No awarding from Related Item Type Group.	The system was unable to award any of the item types specified for a related item type group.

Performing Online Repackaging

You should run Need Summary Validation before performing any Repackaging activities.

This section discusses how to repackage an individual student.

Related Links

Awarding Online

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Pages Used to Perform Online Repackaging

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Aid Package	STDNT-AWARD-ENTRY3	Financial Aid, Awards, Award Processing, Assign Awards to a Student, Student Aid Package	Use this page for manual repackaging, auto select repackaging, or auto repackaging. Auto select repackaging and auto repackaging can be combined with manual repackaging in the same online repackaging session.
Professional Judgement	STDNT-AWARD-ENTRY4	Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement	Use professional judgement to override all federal and aggregate rules except for fiscal limits when repackaging online. Repackage students without a budget. All item types awarded from this component are set to PJ locked.
Packaging Status Summary	STDNT-AID-PACKAGE	Financial Aid, View Packaging Status Summary, Packaging Status Summary	View the repackaging plan ID for a student who has been repackaged.

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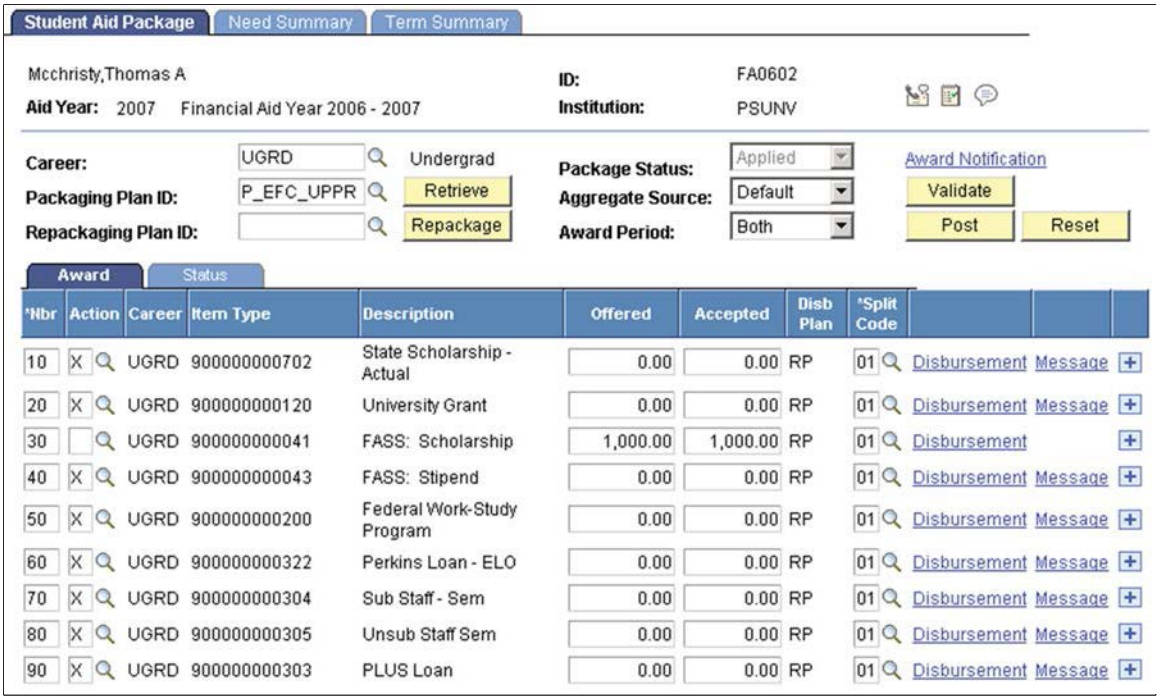
Repackaging an Individual Student

Access the Student Aid Package page (Financial Aid, Awards, Award Processing, Assign Awards to a Student, Student Aid Package) or the Professional Judgement page (Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement).

Image: Student Aid Package page

This example illustrates the fields and controls on the Student Aid Package page. You can find definitions for the fields and controls later on this page.



Common Page Information

Career

The active career for the student to be used for repackaging at this time. If the student has only one career, it is entered into the field by default. If the student has multiple careers, choose from among the active careers for the student, which are defined on the Financial Aid Term record.

After you select a career, do not change this field until after you click the Post button or the Reset button. This prevents you from changing awards for more than one career at a time.

Only the repackaging plans and disbursement plans associated with the active career are available during this session.

Note: If the student has only one career for the aid year, that career is entered into the Career field by default and you do not need to select a career.

Repackaging Plan ID

Either select the repackaging plan from the list to use Auto Repackaging or leave the Repackaging Plan ID field blank to

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use Auto-Select Repackaging. For Auto-Select Repackaging, the system selects the repackaging plan that has the lowest sequence number of the plans for which the student qualifies and populates the Repackaging Plan ID field.

Repackage

Click this button and the system returns award results and the corresponding disbursement plan and split code data. After you post the repackaging results, the repackaging plan ID is displayed on the Student Aid Package, Professional Judgement, and Packaging Status Summary pages.

Award Period

Provides the Repackaging routine with the intended award period processing mode for the award period that you are currently repackaging. The routine uses this information to determine automatically which existing awards are active or passive. The award period that you select functions like the repackaging plan award period attribute in the Repackaging Plan setup in the determination of passive or active mode for existing awards. Values are:

Both: You are currently repackaging the student for both award periods. This is the default value. The Repackaging routine reevaluates all existing awards, processing all awards as active awards. When you select *Both*, all awards are available for reevaluation.

Academic: You are currently repackaging the student for the academic award period (AAP) only. The Repackaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the AAP or for both award periods. The Repackaging routine processes all other existing awards as passive awards.

Non-Std (nonstandard): You are currently repackaging the student for the non-standard award period (NSAP) only. The Repackaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the NSAP or for both award periods. The Repackaging routine processes all other existing awards as passive awards.

Reset

Click to clear this instance.

Post

Click to save the results to the student award table.

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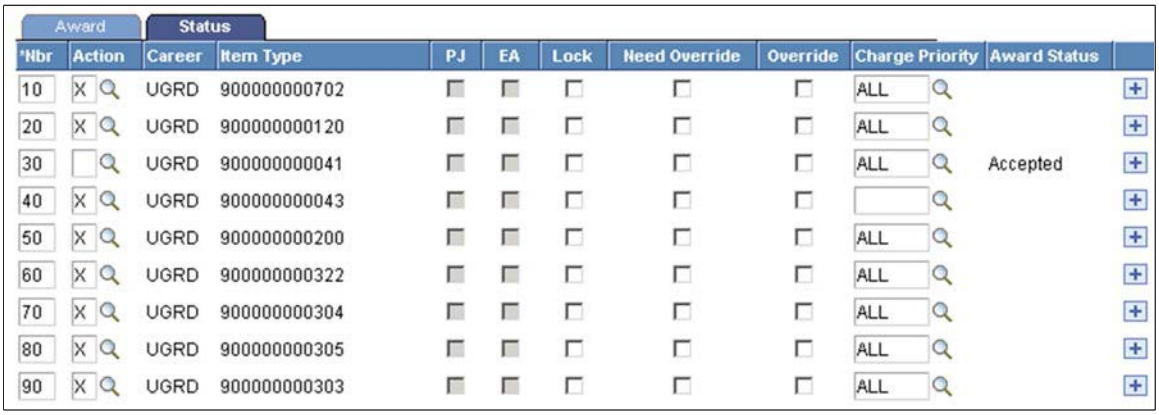
Status tab

Select the Status tab.

Image: Student Aid Package page: Status tab

This example illustrates the fields and controls on the Student Aid Package page: Status tab. You can find definitions for the fields and controls later on this page.



Award | Status

*Nbr	Action	Career	Item Type	PJ	EA	Lock	Need Override	Override	Charge Priority	Award Status
10	X	UGRD	900000000702						ALL	
20	X	UGRD	900000000120						ALL	
30		UGRD	900000000041						ALL	Accepted
40	X	UGRD	900000000043							
50	X	UGRD	900000000200						ALL	
60	X	UGRD	900000000322						ALL	
70	X	UGRD	900000000304						ALL	
80	X	UGRD	900000000305						ALL	
90	X	UGRD	900000000303						ALL	

Lock

Unlike Packaging, during Repackaging locked awards are always preserved and unchanged. Even if the student is in an overaward situation, Repackaging always retains the locked award in its entirety.

EA (external award)

During the loading of external awards, this EA lock attribute is set. External awards are treated as locked awards during Repackaging. External awards are always preserved and unchanged, even if the student is in an overaward situation. You cannot remove the EA lock.

Review a Repackaging Result

This section discusses:

- Repackaging process behavior.
- Example of a decrease repackaging plan.

Repackaging Process Behavior

During the Repackaging process, the system updates the Unmet/Overaward Need and Unmet/Overaward COA totals as each award is adjusted. The system does not wait until all awards have been adjusted to calculate these Need Summary totals. The resulting Unmet/Overaward Need and Unmet/Overaward COA values determine whether further reductions or adjustments are necessary.

For the Decrease - Bottom Up Repackaging rule, the system reduces the student's package from bottom up (highest to lowest sequence), but calculates the Need Summary from top down (lowest to highest sequence). If the student's package contains Special Need/Cost awards and the Repackaging Plan is Decrease - Bottom Up, because the system updates the Need Summary totals top down after each award

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has been reduced, the characteristics of that Special Need/Cost award can change from completely replacing EFC to partially replacing EFC to completely reducing Unmet Need.

Example of a Decrease Repackaging Plan

The Decrease Repackaging Plan example focuses on the FASS Scholarship, a Special Need/Cost award, to highlight the changing nature of the Meet Need/Cost attribute. This behavior is similar to a Stafford Unsub. With each step in the Repackaging example, the FASS Scholarship amount progresses from completely replacing EFC to completely reducing Unmet Need.

Initially, the student was awarded 740 USD FASS Scholarship. During Repackaging, because the student's EFC is reduced to 560 USD and because this is a Special Need/Cost award, Repackaging reduces the award to match the EFC: The original award of 740 less EFC of 560 equals 180. Therefore, the system reduces the original award by 180.

Revised award = 560 (740 - 180 = 560).

When the system determines that the award is 560 USD, it preserves that award in the student's package. However, because that award is defined as Special/Need Cost, its attribute changes from completely replacing EFC to completely reducing Unmet Need.

Original Package Awards

The Student Aid Package page displays the student's initial set of awards.

Image: Original Package, Student Aid Package page

This example illustrates the fields and controls on the Original Package, Student Aid Package page. You can find definitions for the fields and controls later on this page.

This table lists the relevant attributes for the original awards.

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Sequence	*Award*	*Meet Need!Cost*	*Lock*
10	Federal Pell Grant	Straight Need/Cost	Unlocked
20	State Scholarship	Straight Need/Cost	Unlocked
30	Honors Scholarship	Special Need/Cost	Unlocked
40	University Grant	Straight Need/Cost	Unlocked
50	Federal SEOG Grant	Straight Need/Cost	Unlocked
60	FASS Grant	Straight Need/Cost	Locked
70	FASS Scholarship	Special Need/Cost	Unlocked
80	Exclude Grant	Straight Need/Cost	Locked

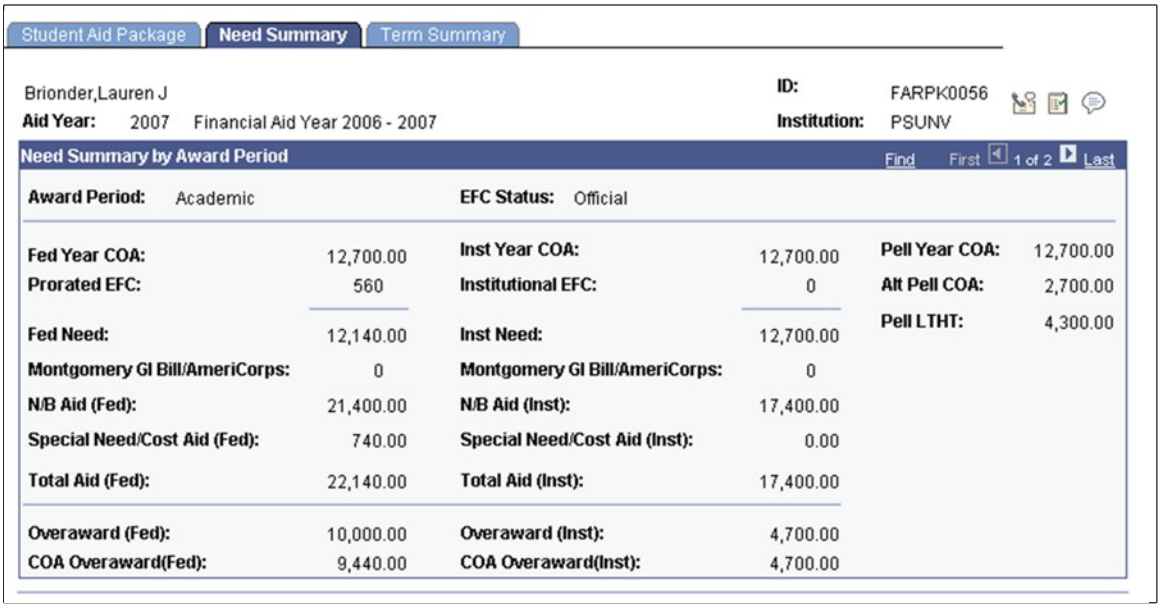
After the original package is made to the student, a change to COA or EFC occurs that forces the student into an overaward situation. As a result, the student is overawarded in both Need and COA.

Original Need Summary Totals

The Need Summary page displays the student's need summary totals after Packaging.

Image: Need summary totals after Packaging

This example illustrates the fields and controls on the Need summary totals after Packaging. You can find definitions for the fields and controls later on this page.



The administrator determines that the student needs to be repackaged.

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Decrease-Bottom Up Repackaging Plan

The Repackaging Plan page displays the Decrease - Bottom Up plan to be applied.

Image: Decrease - Bottom Up Repackaging plan

This example illustrates the fields and controls on the Decrease - Bottom Up Repackaging plan.

Step 1

The system first determines that the student is overawarded. It then locates the highest sequenced award, Exclude Grant, and evaluates it. Exclude Grant is a Straight Need/Cost award. Because it is a locked award, the system does not reduce it; it is preserved and remains unchanged. The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA.

Image: Step 1 calculation

This example illustrates the Step 1 calculation.

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			Step 1		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,440.00)	740.00	(9,000.00)
Exclude Grant	Straight Need/Cost	Y	(9,440.00)	1,000.00	(10,000.00)
(Overaward Need)/ Unmet Need				(10,000.00)	(10,000.00)
(Overaward COA)/ Unmet COA			(9,440.00)	(9,440.00)	

This the Need Summary result after the system processes the Exclude Grant.

Image: Result of step 1 calculation

This example illustrates the Result of step 1 calculation.

Step 1	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	22,140.00
Special Need/Cost Aid	0.00
Total Aid	22,140.00
Overaward Need	(10,000.00)
Overaward COA	(9,440.00)

The student is still overawarded.

Step 2

The next sequenced award, bottom up, is the FASS Scholarship. This is an unlocked Special Need/Cost award. Because the student is overawarded, the Special Need/Cost attribute is applied, and the system reduces the award down to match the EFC: The original award of 740 less EFC of 560 equals 180. Therefore, the system reduces the original award by 180.

Revised award = 560 (740 - 180 = 560).

After the reduction is made, the system then updates the Need Summary totals (top down). Both the COA and Need running totals are reduced based on existing awards as well as on the revised 560 USD FASS Scholarship. In this step, the FASS Scholarship completely replaces EFC.

Image: Step 2 calculation

This example illustrates the Step 2 calculation.

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			Step 2		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,260.00)	560.00	(8,820.00)
Exclude Grant	Straight Need/Cost	Y	(9,260.00)	1,000.00	(9,820.00)
(Overaward Need)/ Unmet Need				(9,820.00)	(9,820.00)
(Overaward COA)/ Unmet COA			(9,260.00)	(9,260.00)	

This the Need Summary result after the system processes the FASS Scholarship.

Image: Result of step 2 calculation

This example illustrates the Result of step 2 calculation.

Step 2	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	21,400.00
Special Need/Cost Aid	560.00
Total Aid	21,960.00
Overaward Need	(9,820.00)
Overaward COA	(9,260.00)

The student is still overawarded.

Step 3

The next sequenced award, bottom up, is the FASS Grant. This is a locked Straight Need/Cost award. Because it is locked, the system preserves the original amount and does not reduce it. The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA. In this step, the FASS Scholarship completely replaces EFC.

Image: Step 3 calculation

This example illustrates the Step 3 calculation.

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			Step 3		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,260.00)	560.00	(8,820.00)
Exclude Grant	Straight Need/Cost	Y	(9,260.00)	1,000.00	(9,820.00)
(Overaward Need)/ Unmet Need				(9,820.00)	(9,820.00)
(Overaward COA)/ Unmet COA			(9,260.00)	(9,260.00)	

This is the Need Summary result after the system processes the FASS Grant.

Image: Result of step 3 calculation

This example illustrates the Result of step 3 calculation.

Step 3	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	21,400.00
Special Need/Cost Aid	560.00
Total Aid	21,960.00
Overaward Need	(9,820.00)
Overaward COA	(9,260.00)

The student is still overawarded.

Step 4

The next sequenced award, bottom up, is the SEOG, an unlocked, Straight Need/Cost award. Because the student still has an Overaward Need amount of 9,820 USD, the system reduces the SEOG award down to 0.00 USD. After the reduction is made, the system updates the Need Summary totals for the student,reducing both the Need and COA totals based on the revised SEOG as well as other existing awards. In this step, the FASS Scholarship completely replaces EFC.

Image: Step 4 calculation

This example illustrates the Step 4 calculation.

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			Step 4		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(2,700.00)	0.00	(3,260.00)
FASS Grant	Straight Need/Cost	Y	(3,700.00)	1,000.00	(4,260.00)
FASS Scholarship	Special Need/Cost	N	(4,260.00)	560.00	(4,820.00)
Exclude Grant	Straight Need/Cost	Y	(5,260.00)	1,000.00	(5,820.00)
(Overaward Need)/ Unmet Need				(5,820.00)	(5,820.00)
(Overaward COA)/ Unmet COA			(5,260.00)	(5,260.00)	

This the Need Summary result after the system processes the SEOG.

Image: Result of step 4 calculation

This example illustrates the Result of step 4 calculation.

Step 4	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	17,400.00
Special Need/Cost Aid	560.00
Total Aid	17,960.00
Overaward Need	(5,820.00)
Overaward COA	(5,260.00)

The student is still overawarded.

Step 5

The next sequenced award, bottom up, is the University Grant, an unlocked, Straight Need/Cost award. Because the student's Overaward Need is 5,820 USD, the system reduces the University Grant to 0.00 USD.

The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/ Overaward COA. After the University Grant reduction, the student is left with remaining Unmet Need and remaining Unmet COA.

The system then subtracts the 1,000 USD locked FASS Grant from the running Need Summary totals. With the handling of this award, it presents a condition in which an overaward exists for Need (-360) but not for COA (+200). Now, because the FASS Scholarship is a Special Need/Cost award, it tries to reduce Unmet Need. Because no Unmet Need exists, it then replaces EFC with 200 USD because Unmet COA is 200 USD. Note that the characteristics of the FASS Scholarship changes since the initial reduction of the FASS Scholarship took place at step 2.

Image: Step 5 calculation

This example illustrates the Step 5 calculation.

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			Step 5		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	1,200.00	0.00	640.00
SEOG	Straight Need/Cost	N	1,200.00	0.00	640.00
FASS Grant	Straight Need/Cost	Y	200.00	1,000.00	(360.00)
FASS Scholarship	Special Need/Cost	N	(360.00)	560.00	(720.00)
Exclude Grant	Straight Need/Cost	Y	(1,360.00)	1,000.00	(1,720.00)
(Overaward Need)/ Unmet Need				(1,720.00)	(1,720.00)
(Overaward COA)/ Unmet COA			(1,360.00)	(1,360.00)	

This is the Need Summary after the system processes the University Grant.

Image: Results of step 5 calculation

This example illustrates the Results of step 5 calculation.

Step 5	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	13,860.00
Special Need/Cost Aid	200.00
Total Aid	14,060.00
Overaward Need	(1,720.00)
Overaward COA	(1,360.00)

The student is still overawarded.

Step 6

The next sequenced award, bottom up, is the Honors Scholarship, an unlocked, Special Need/Cost award. The Overaward Need is 1,720 USD, but from a top down Need Summary perspective, the student has remaining Unmet Need. So the award inherits the Straight Need/Cost characteristic. To account for the Overaward Need of 1,720 USD, the system subtracts 1,720 USD from the original Honors Scholarship amount of 6,000 USD to reduce the award to 4,280 USD (original award 6,000 minus overaward 1,720 equals revised award 4,280).

After reducing the Honors Scholarship, from a Need Summary perspective (top down), the student has remaining Unmet Need of 2,360 USD. Progressing through the package and updating Need Summary, the system accounts for the 1,000 USD FASS Grant, reducing the student's Unmet Need to 1,360 USD. At this point, because the student has remaining Unmet Need and the FASS Scholarship amount of 560 USD is less than the Unmet Need amount of 1,360 USD, the Meet Need/Cost attribute of the FASS Scholarship now inherits the Straight Need/Cost characteristic. This reduces the student's Unmet Need to 800 USD.

Image: Step 6 calculation

This example illustrates the Step 6 calculation.

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			Step 6		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	2,920.00	4,280.00	2,360.00
University Grant	Straight Need/Cost	N	2,920.00	0.00	2,360.00
SEOG	Straight Need/Cost	N	2,920.00	0.00	2,360.00
FASS Grant	Straight Need/Cost	Y	1,920.00	1,000.00	1,360.00
FASS Scholarship	Special Need/Cost	N	1,360.00	560.00	800.00
Exclude Grant	Straight Need/Cost	Y	360.00	1,000.00	(200.00)
(Overaward Need)/ Unmet Need				(200.00)	(200.00)
(Overaward COA)/ Unmet COA			360.00	360.00	

This is the Need Summary result after the system processes the Honors Scholarship.

Image: Results of step 6 calculation

This example illustrates the Results of step 6 calculation.

Step 6	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	12,340.00
Special Need/Cost Aid	0.00
Total Aid	12,340.00
Overaward Need	(200.00)
Unmet COA	360.00

The student is still overawarded in Need.

Step 7

Finally, because the student still has an Overaward Need amount of 200 USD and the Honors Scholarship amount is greater than 0.00 USD, the system reevaluates the Honors Scholarship a second time and reduces it by 200 USD so that the student is no longer in an overaward situation. At this point, when the Need Summary totals are updated, the FASS Scholarship still inherits the Straight Need/Cost characteristic.

Image: Step 7 calculation

This example illustrates the Step 7 calculation.

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			Step 7		
Item	Meet Need/Cost	Lock	Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	3,120.00	4,080.00	2,560.00
University Grant	Straight Need/Cost	N	3,120.00	0.00	2,560.00
SEOG	Straight Need/Cost	N	3,120.00	0.00	2,560.00
FASS Grant	Straight Need/Cost	Y	2,120.00	1,000.00	1,560.00
FASS Scholarship	Special Need/Cost	N	1,560.00	560.00	560.00
Exclude Grant	Straight Need/Cost	Y	560.00	1,000.00	1,000.00
(Overaward Need)/ Unmet Need				0.00	0.00
(Overaward COA)/ Unmet COA			560.00	560.00	

This is the Need Summary result after the system processes the Honors Scholarship a second time to eliminate the overaward.

Image: Results of step 7 calculation

This example illustrates the Results of step 7 calculation.

Step 7	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	12,140.00
Special Need/Cost Aid	0.00
Total Aid	12,140.00
Unmet Need	0.00
Unmet COA	560.00

The student is no longer in an overaward situation.

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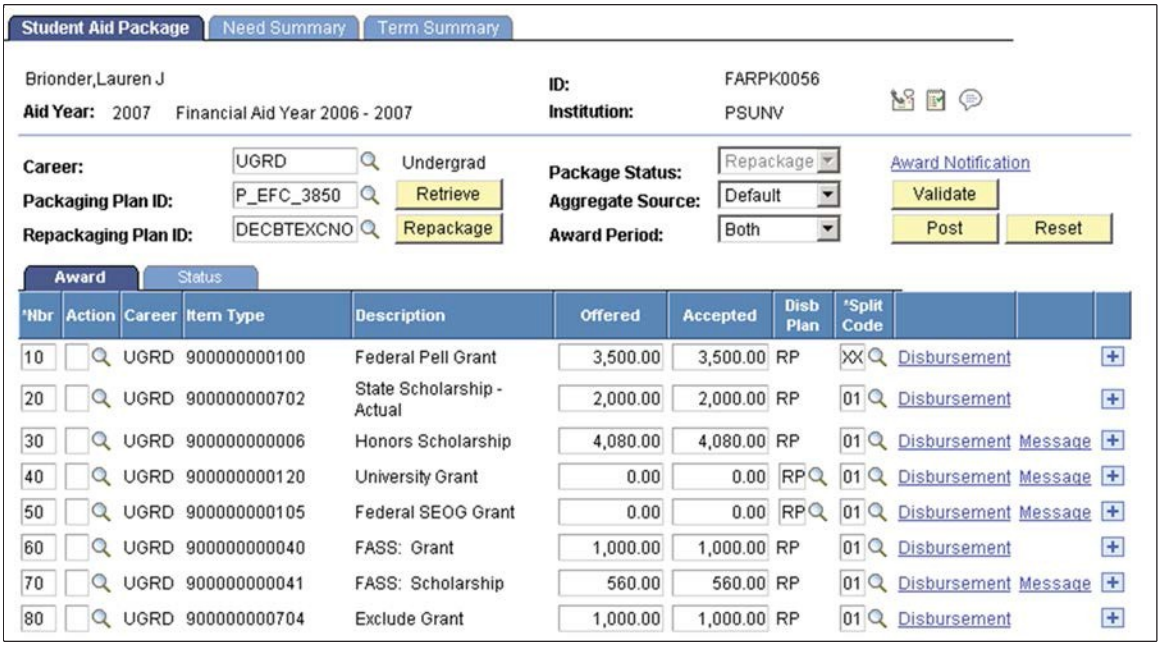
Final Award Results

The Student Aid Package page displays the final set of award results.

Image: Final results, Student Aid Package page

This example illustrates the fields and controls on the Final results, Student Aid Package page.

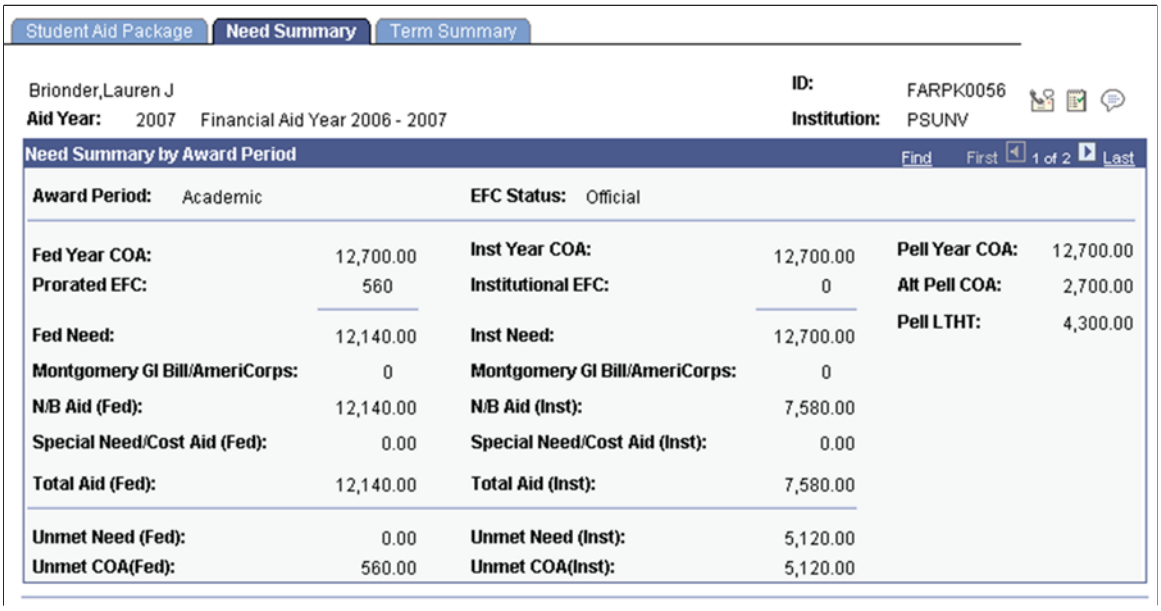


Final Need Summary Results

The Need Summary results page displays the final need totals.

Image: Final need totals, Need Summary page

This example illustrates the fields and controls on the Final need totals, Need Summary page.



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At this point, an administrator might choose to repackage the student for an increase to fill the Unmet COA using a Special Need/Cost award.

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